

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

Vancouver Island 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. Vancouver Island

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 Vancouver Island tourism region encompasses Vancouver Island, the Gulf Islands, as well as a portion of the mainland around the central BC coast. It has one of the world's most diverse ecosystems, including: rainforests, marshes, meadows, beaches, mountains, oceans, rivers and lakes creating habitats for multitudes of wildlife species. The Vancouver Island region is known as one of the world's premier locations for whale watching, birding, as well as salmon and trout fishing.

The Beaufort Mountain Range bisects Vancouver Island north to south. Within the range lie Strathcona Provincial Park and Mount Washington Ski Resort, a downhill, cross-country and snow-sport destination which regularly accumulates the largest snow base of all winter resorts in the province. Mount Washington is primarily a winter operation but also attracts enthusiastic hikers and mountain bikers during the summer months but has no real shoulder season.

Victoria is a very important destination within the Vancouver Island tourism region. It offers a vibrant urban atmosphere along with history, heritage and superb scenery. This combination makes for quality shopping, dining, and attractions/entertainment, plus a variety of outdoor activities, such as hiking, cycling, camping, golfing, kayaking, and fishing. Victoria also has a significant business/government and conference/meetings trade.

Throughout the Vancouver Island region, tourism operators pride themselves on the islands' scenic beauty and warm hospitality of tourism hosts. The tranquility of Vancouver Island and the nearby Gulf Islands make them a popular place for artists and artisans to reside. Art galleries, studios and shops selling unique, locally produced arts and crafts are found in many communities. Culture, heritage and aboriginal tourism products are predominant throughout Vancouver Island and also on the mainland coast area. Culinary and wine tourism are important growth markets.

General touring and outdoor pursuits are the priority activities of visitors to the Vancouver Island tourism region. There has been some expansion of the luxury resort tourism market in the region as evidenced by several new resorts and spas in the past decade or so, as well as the recent rebuilding of the well-established Oak Bay Hotel near Victoria. The new property is more luxurious and has a spa component. Otherwise, no significant new developments are anticipated.

The Vancouver Island tourism region was harshly affected by the recent economic recession, having experienced noticeable declines in visitation, revenues and employment. The region's dependence on the US travel market was also hampered by the strong Canadian dollar. In addition, rising fuel prices and ferry fares made access to the area more expensive. A forward growth rate of 1% per annum is seen as positive for this region. Although the Vancouver Island tourism region is affected by seasonality and retention issues, especially in the occupations of cooks, housekeeping and front desk staff, recruiting and retaining workers is presently viewed as less of a concern than attracting and growing the visitor market by some of the region's stakeholders. However, with expected constraints in labour supply due to increasing retirements and declining workforce entrants, even with potentially "soft" tourism economic growth, the need for tourism and hospitality labour force planning is acknowledged.

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/CBoC 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%. 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 Vancouver Island / Coast development region has been in decline, at a rate of 1.9% per year, compared with the provincial average rate of 1.2% per year. Within those tourism and hospitality related industries, accommodation and food services industry and the finance, insurance, real estate and leasing industry in the development region were two industries that experienced decrease in employment, compared with the provincial averages in the same industries (-1.1% compared with 2.8%, and -8% compared with no change at the provincial level). Employment in the transportation and warehousing industry, in the business, building and other support services industry, and in the information, culture and recreation industry has grown at rates faster than the provincial averages in the same industries.

Figure 1: Employment in Tourism and Hospitality Related Industries, Vancouver Island/Coast Development Region and BC

Employment ('000s)	BC			Annual Growth Vancouver Island/Coast			Annual Growth Rate 2010-12	
	2010	2011	2012	Rate 2010-12	2010	2011		2012
All Industries	2,256.5	2,274.7	2,312.5	1.2%	383.8	367.1	369.5	-1.9%
Goods-Producing Sector	442.7	447.4	459.1	1.8%	67.2	62.6	59.7	-5.7%
Agriculture	31.8	26.1	26.0	-9.6%	5.1	3.7	3.6	-16.0%
Forestry, Fishing, Mining, Oil and Gas	40.6	40.1	46.1	6.6%	5.5	7.9	8.2	22.1%
Utilities	14.0	12.8	14.9	3.2%	x	x	1.6	
Construction	190.5	204.6	192.9	0.6%	35.8	31.7	27.7	-12.0%
Manufacturing	165.8	163.9	179.2	4.0%	19.7	18.1	18.8	-2.3%
Services-Producing Sector	1,813.8	1,827.2	1,853.4	1.1%	316.6	304.5	309.8	-1.1%
Trade	370.1	355.0	356.6	-1.8%	63.4	58.0	60.2	-2.6%
Transportation and Warehousing	118.6	124.1	128.9	4.3%	13.8	14.9	15.6	6.3%
Finance, Insurance, Real Estate and Leasing	141.8	139.4	141.8	0.0%	22.1	18.0	18.7	-8.0%
Professional, Scientific and Technical Services	174.3	182.1	173.0	-0.4%	26.7	28.3	26.6	-0.2%
Business, Building and Other Support Services	91.0	94.2	97.6	3.6%	15.2	16.7	16.8	5.1%
Educational Services	167.3	167.1	177.3	2.9%	28.2	24.4	27.4	-1.4%
Health Care and Social Assistance	264.2	261.3	274.5	1.9%	59.3	52.1	57.1	-1.9%
Information, culture and recreation	108.1	109.4	116.0	3.6%	14.0	16.7	15.9	6.6%
Accommodation and food services	162.3	181.8	171.6	2.8%	27.9	31.4	27.3	-1.1%
Other services	104.7	103.9	113.9	4.3%	16.3	15.4	16.6	0.9%
Public administration	111.4	108.9	102.4	-4.1%	29.7	28.7	27.6	-3.6%

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 Vancouver Island/Coast development region, employment for all industries is projected to grow at an average rate of 0.2% 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, transportation and warehousing is projected to grow slightly faster than the provincial average for that industry. Other services industry (which is the broader industry group that includes the entertainment and recreation subgroup) is projected to grow as fast as the provincial average in that industry. The other two 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, Vancouver Island/Coast Development Region and BC

	Projected Annual Growth Rate 2010-2020	
	<u>BC</u>	<u>Vancouver Island/Coast</u>
All Industries Total	1.2%	0.2%
Transportation & Warehousing	1.4%	1.5%
Finance, Insurance & Real Estate	0.8%	-1.2%
Professional, Scientific & Managerial	1.8%	0.9%
Other Services	1.6%	1.6%
Accommodation & Food Services	1.7%	0.9%

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, Vancouver Island / Coast

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	1,373	1,456	1,496	1,540	1,552	1,563	1,559	1,567	1,594	1,630	1,666
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	299	317	325	335	338	340	340	341	347	355	363
Pursers and Flight Attendants (G712)/(NOC6432)	230	244	250	258	260	261	261	262	267	273	279
Airline Sales and Service Agents (G713)/(NOC6433)	286	304	312	321	324	326	325	327	333	340	348
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	97	102	105	108	109	110	110	110	112	115	117
Air Transport Ramp Attendants (H737)/(NOC7437)	81	86	88	90	91	92	92	92	94	96	98
All other Air Transportation Occupations	381	404	415	427	430	433	432	434	442	452	462
Rail transportation	72	75	77	79	79	79	78	77	77	78	77
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	33	34	35	36	36	36	35	35	35	35	35
Railway Conductors and Brakemen/women (H722)/(NOC7362)	39	41	42	43	43	43	43	42	42	42	42
Other Transportation	2,670	2,769	2,848	2,945	2,971	3,000	2,992	3,009	3,060	3,118	3,153
Transportation Managers (A373)/(NOC0713)	58	60	62	64	64	65	65	65	66	68	68
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	47	49	50	52	52	53	53	53	54	55	55
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	113	117	120	124	126	127	126	127	129	132	133
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	829	859	884	914	922	931	929	934	950	968	979
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	338	350	360	373	376	380	379	381	388	395	400
All other Transportation Occupations (excl. air)	1,286	1,333	1,371	1,418	1,430	1,444	1,440	1,448	1,473	1,501	1,518
Accommodation	9,886	10,064	9,447	10,268	10,438	10,595	10,598	10,669	10,784	11,010	11,182
Accommodation Service Managers (A222)/(NOC0632)	710	724	680	740	753	766	767	774	784	801	815
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	487	496	466	507	516	525	526	530	537	549	559
Chefs (G411)/(NOC6241)	191	193	180	194	196	198	196	195	195	197	198
Cooks (G412)/(NOC6242)	290	296	278	303	308	313	314	316	321	328	334
Bartenders (G512)/(NOC6452)	118	120	113	123	125	127	127	129	130	133	135
Food and Beverage Servers (G513)/(NOC6453)	1,072	1,092	1,027	1,118	1,138	1,156	1,158	1,169	1,183	1,210	1,232
Hotel Front Desk Clerks (G715)/(NOC6435)	1,161	1,183	1,112	1,210	1,232	1,252	1,254	1,265	1,281	1,311	1,334
Light Duty Cleaners (G931)/(NOC6661)	1,854	1,878	1,754	1,898	1,921	1,941	1,928	1,927	1,934	1,960	1,975
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	431	439	413	449	457	465	466	470	476	486	495
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	401	409	384	418	425	432	433	437	442	453	461
All other occupations in accommodation	3,172	3,233	3,039	3,307	3,366	3,421	3,428	3,458	3,501	3,581	3,644

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	21,588	21,838	20,397	22,010	22,149	22,367	22,307	22,405	22,590	22,997	23,236
Restaurant & food service manager (A221)/(NOC0631)	1,679	1,698	1,586	1,711	1,722	1,738	1,733	1,741	1,755	1,787	1,805
Food Service Supervisors (G012)/(NOC6212)	583	589	550	594	598	603	602	604	609	620	627
Cashiers (G311)/(NOC6611)	1,352	1,367	1,277	1,378	1,387	1,400	1,396	1,402	1,414	1,439	1,454
Chefs (G411)/(NOC6241)	938	950	889	961	969	981	978	982	990	1,008	1,018
Cooks (G412)/(NOC6242)	3,004	3,039	2,838	3,063	3,082	3,113	3,105	3,119	3,145	3,202	3,235
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	691	699	653	704	709	715	714	717	723	736	743
Bartenders (G512)/(NOC6452)	695	703	657	708	713	720	718	721	727	740	747
Food and Beverage Servers (G513)/(NOC6453)	4,698	4,753	4,438	4,789	4,819	4,866	4,853	4,874	4,914	5,003	5,055
Bakers (G942)/(NOC6252)	223	226	211	227	229	231	230	231	233	237	240
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	6,022	6,091	5,689	6,138	6,176	6,236	6,220	6,247	6,299	6,412	6,479
Delivery drivers (H714)/(NOC7414)	188	190	178	192	193	195	194	195	197	200	202
All other Food and Beverage occupations	1,515	1,533	1,431	1,544	1,554	1,569	1,565	1,571	1,584	1,613	1,630
Recreation and Entertainment	6,527	6,754	6,405	6,987	6,986	7,013	6,902	6,949	7,108	7,322	7,459
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	171	177	168	183	183	184	181	182	186	192	196
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	81	84	79	86	86	87	85	86	88	91	92
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	750	776	736	803	803	806	793	798	817	841	857
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	442	457	433	473	473	475	467	471	481	496	505
Cashiers (G311)/(NOC6611)	209	216	205	223	223	224	221	222	227	234	239
Security Guards and Related Occupations (G631)/(NOC6651)	98	101	96	104	104	105	103	104	106	109	111
Casino Occupations (G723)/(NOC6443)	174	180	171	186	186	187	184	185	189	195	199
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	382	395	374	408	408	410	403	406	415	428	436
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	110	114	108	118	118	119	117	118	120	124	126
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	198	205	194	212	212	213	209	211	216	222	226
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	316	327	310	338	338	339	334	336	344	354	361
All other Recreation and Entertainment occupations	3,597	3,723	3,530	3,851	3,851	3,865	3,804	3,831	3,918	4,036	4,111
Travel Services	1,612	1,699	1,699	1,673	1,669	1,664	1,643	1,634	1,638	1,658	1,663
Retail Trade Managers (A211)/(NOC0621)	108	114	114	112	112	111	110	109	110	111	111
Travel Counsellors (G711)/(NOC6431)	602	635	635	625	624	622	614	610	612	619	621
All other Travel Services Occupations	902	951	951	936	934	931	920	914	916	928	931
Total Tourism and Related Industries	43,727	44,655	42,368	45,502	45,844	46,280	46,078	46,311	46,853	47,811	48,437

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 air transportation industry are projected to grow the fastest. However, 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 (545);
- Food and beverage servers (516);
- Cooks (275);
- Hotel Front Desk Clerks (173);
- Bus drivers (150);
- Cashiers (132);
- Restaurant and food service managers (126);
- Light duty cleaners (121); and
- Program Leaders and Instructors in Recreation and Sport (107)

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, Vancouver Island / Coast, 2011 to 2020

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Air transportation	293	530	823
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	64	136	201
Pursers and Flight Attendants (G712)/(NOC6432)	49	80	129
Airline Sales and Service Agents (G713)/(NOC6433)	61	100	161
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	21	39	59
Air Transport Ramp Attendants (H737)/(NOC7437)	17	29	46
All other Air Transportation Occupations	81	146	227
Rail transportation	5	30	35
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	2	14	16
Railway Conductors and Brakemen/women (H722)/(NOC7362)	3	16	19
Other Transportation	483	962	1,445
Transportation Managers (A373)/(NOC0713)	11	26	36
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	8	11	19
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	20	34	55
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	150	316	467
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	62	129	191
All other Transportation Occupations (excl. air)	232	447	678
Accommodation	1,297	2,523	3,820
Accommodation Service Managers (A222)/(NOC0632)	105	280	385
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	72	88	160
Chefs (G411)/(NOC6241)	7	38	45
Cooks (G412)/(NOC6242)	43	61	104
Bartenders (G512)/(NOC6452)	17	15	32
Food and Beverage Servers (G513)/(NOC6453)	160	134	294
Hotel Front Desk Clerks (G715)/(NOC6435)	173	381	554
Light Duty Cleaners (G931)/(NOC6661)	121	594	715
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	64	143	208
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	60	45	105
All other occupations in accommodation	473	745	1,217

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Food & Beverage Services	1,648	3,577	5,226
Restaurant & food service manager (A221)/(NOC0631)	126	637	763
Food Service Supervisors (G012)/(NOC6212)	44	138	182
Cashiers (G311)/(NOC6611)	103	215	317
Chefs (G411)/(NOC6241)	80	190	270
Cooks (G412)/(NOC6242)	231	603	835
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	53	83	136
Bartenders (G512)/(NOC6452)	52	84	136
Food and Beverage Servers (G513)/(NOC6453)	356	565	921
Bakers (G942)/(NOC6252)	17	46	63
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	457	648	1,105
Delivery drivers (H714)/(NOC7414)	14	66	80
All other Food and Beverage occupations	114	303	418
Recreation and Entertainment	932	1,612	2,544
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	25	71	95
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	12	27	39
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	107	135	242
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	64	95	158
Cashiers (G311)/(NOC6611)	30	34	64
Security Guards and Related Occupations (G631)/(NOC6651)	14	38	52
Casino Occupations (G723)/(NOC6443)	25	47	72
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	54	84	138
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	16	37	52
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	28	22	50
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	45	79	124
All other Recreation and Entertainment occupations	514	943	1,457
Travel Services	52	540	591
Retail Trade Managers (A211)/(NOC0621)	3	40	43
Travel Counsellors (G711)/(NOC6431)	19	191	210
All other Travel Services Occupations	29	309	338
Total Tourism and Related Industries	4,710	9,775	14,484

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

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Food & Beverage Services	1,739	3,558	5,297
Restaurant & food service manager (A221)/(NOC0631)	133	633	767
Food Service Supervisors (G012)/(NOC6212)	46	137	184
Cashiers (G311)/(NOC6611)	108	214	322
Chefs (G411)/(NOC6241)	84	189	273
Cooks (G412)/(NOC6242)	244	600	844
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	56	83	138
Bartenders (G512)/(NOC6452)	55	83	138
Food and Beverage Servers (G513)/(NOC6453)	376	562	938
Bakers (G942)/(NOC6252)	18	46	64
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	482	645	1,127
Delivery drivers (H714)/(NOC7414)	15	66	81
All other Food and Beverage occupations	121	302	422
Recreation and Entertainment	1,173	1,661	2,834
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	31	73	104
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	15	28	43
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	135	139	274
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	80	97	177
Cashiers (G311)/(NOC6611)	37	36	73
Security Guards and Related Occupations (G631)/(NOC6651)	17	39	56
Casino Occupations (G723)/(NOC6443)	31	48	80
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	68	86	155
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	20	38	58
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	36	23	58
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	57	82	138
All other Recreation and Entertainment occupations	647	972	1,619
Travel Services	57	542	599
Retail Trade Managers (A211)/(NOC0621)	4	40	44
Travel Counsellors (G711)/(NOC6431)	21	192	213
All other Travel Services Occupations	32	310	342
Total Tourism and Related Industries	5,077	9,791	14,868

Source: RKA based on BC Labour Market Scenario Model

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 can potentially be much higher.

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 (715);
- Food and beverage servers (699);
- Cooks (664);
- Restaurant and food service managers (637);
- Light duty cleaners (594);
- Hotel front desk clerks (381);
- Bus drivers (316);
- Accommodation Service Managers (280);
- Cashiers (249); and
- Chefs (227).

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 Vancouver Island/Coast development region, labour force growth is projected to be at an average rate of 0.4% per year between 2010 and 2020, compared with the projected employment growth rate of 0.2% per year in the region during the same period.

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, Vancouver Island / Coast

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	1,382	1,447	1,483	1,520	1,518	1,518	1,510	1,514	1,534	1,556	1,571
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	300	312	318	324	322	320	316	315	317	319	320
Pursers and Flight Attendants (G712)/(NOC6432)	234	246	253	260	260	261	261	262	266	271	274
Airline Sales and Service Agents (G713)/(NOC6433)	286	300	306	314	313	313	311	312	316	320	323
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	97	102	106	109	109	110	110	111	113	115	117
Air Transport Ramp Attendants (H737)/(NOC7437)	82	87	90	93	94	94	95	96	98	100	102
All other Air Transportation Occupations	382	400	410	420	420	420	418	419	425	431	435
Rail transportation	70	73	75	77	76	76	75	75	76	77	77
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	32	33	34	35	35	35	34	34	34	35	35
Railway Conductors and Brakemen/women (H722)/(NOC7362)	38	40	41	42	42	42	41	41	41	42	42
Other Transportation	2,661	2,786	2,854	2,925	2,921	2,922	2,907	2,914	2,953	2,997	3,025
Transportation Managers (A373)/(NOC0713)	52	55	56	57	57	58	57	57	58	59	60
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	47	49	50	51	51	51	51	51	51	52	52
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	114	120	122	125	124	124	123	123	125	126	127
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	816	854	875	897	895	896	891	893	905	918	927
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	334	351	362	372	374	376	375	377	384	391	396
All other Transportation Occupations (excl. air)	1,297	1,357	1,389	1,422	1,419	1,418	1,410	1,412	1,430	1,451	1,463
Accommodation	9,945	10,157	9,531	10,291	10,329	10,349	10,295	10,315	10,380	10,557	10,685
Accommodation Service Managers (A222)/(NOC0632)	717	735	692	750	755	759	757	761	768	783	795
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	489	499	468	505	507	507	504	505	508	516	522
Chefs (G411)/(NOC6241)	187	191	179	193	194	195	194	194	195	199	201
Cooks (G412)/(NOC6242)	292	298	280	303	304	305	303	304	306	311	315
Bartenders (G512)/(NOC6452)	119	122	114	123	123	123	122	121	122	124	125
Food and Beverage Servers (G513)/(NOC6453)	1,080	1,100	1,030	1,109	1,109	1,108	1,100	1,100	1,105	1,121	1,132
Hotel Front Desk Clerks (G715)/(NOC6435)	1,168	1,191	1,115	1,202	1,204	1,204	1,195	1,194	1,199	1,217	1,228
Light Duty Cleaners (G931)/(NOC6661)	1,871	1,916	1,803	1,952	1,964	1,973	1,969	1,978	1,997	2,037	2,067
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	429	439	412	446	448	450	448	450	454	462	469
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	403	412	386	416	417	418	415	415	418	424	429
All other occupations in accommodation	3,189	3,254	3,052	3,293	3,303	3,307	3,287	3,291	3,309	3,363	3,401

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	21,739	22,057	20,551	22,040	21,977	21,880	21,681	21,643	21,701	21,995	22,187
Restaurant & food service manager (A221)/(NOC0631)	1,696	1,725	1,611	1,732	1,732	1,728	1,716	1,715	1,723	1,749	1,767
Food Service Supervisors (G012)/(NOC6212)	589	597	556	596	594	591	585	583	584	592	597
Cashiers (G311)/(NOC6611)	1,354	1,374	1,279	1,372	1,367	1,360	1,349	1,348	1,353	1,372	1,385
Chefs (G411)/(NOC6241)	938	954	891	958	957	955	948	948	953	967	978
Cooks (G412)/(NOC6242)	2,994	3,045	2,844	3,056	3,054	3,048	3,026	3,026	3,040	3,087	3,120
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	698	706	655	701	696	691	683	680	680	688	692
Bartenders (G512)/(NOC6452)	704	712	662	708	703	698	689	684	683	689	692
Food and Beverage Servers (G513)/(NOC6453)	4,749	4,807	4,468	4,780	4,754	4,721	4,666	4,646	4,646	4,697	4,726
Bakers (G942)/(NOC6252)	225	229	214	230	230	229	228	228	229	233	235
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	6,076	6,152	5,720	6,121	6,090	6,050	5,987	5,969	5,978	6,051	6,096
Delivery drivers (H714)/(NOC7414)	191	194	181	195	194	194	192	192	193	196	198
All other Food and Beverage occupations	1,524	1,563	1,471	1,593	1,605	1,614	1,612	1,621	1,638	1,673	1,701
Recreation and Entertainment	6,529	6,964	6,601	7,085	6,955	6,895	6,736	6,722	6,809	6,938	7,007
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	177	190	181	195	192	191	187	187	190	194	197
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	81	86	82	88	86	86	84	84	85	86	87
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	755	802	758	810	792	782	761	758	765	777	782
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	391	418	398	428	421	419	410	410	416	425	430
Cashiers (G311)/(NOC6611)	213	227	215	231	227	226	221	220	224	228	231
Security Guards and Related Occupations (G631)/(NOC6651)	102	109	103	111	108	107	105	104	106	107	108
Casino Occupations (G723)/(NOC6443)	174	186	176	189	186	184	180	180	182	186	188
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	397	423	401	430	422	418	408	408	413	421	425
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	113	120	114	123	121	120	117	117	119	121	123
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	199	212	201	216	212	210	205	205	208	212	214
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	321	342	323	346	339	335	327	326	329	335	337
All other Recreation and Entertainment occupations	3,607	3,849	3,650	3,919	3,849	3,817	3,730	3,724	3,773	3,845	3,885
Travel Services	1,619	1,703	1,711	1,693	1,697	1,696	1,688	1,691	1,709	1,740	1,764
Retail Trade Managers (A211)/(NOC0621)	108	115	116	116	117	117	118	118	120	123	126
Travel Counsellors (G711)/(NOC6431)	605	637	641	635	637	637	634	636	644	657	666
All other Travel Services Occupations	905	951	954	943	944	942	936	936	945	960	972
Total Tourism and Related Industries	43,945	45,188	42,806	45,631	45,473	45,336	44,893	44,874	45,162	45,861	46,316

Source: RKA based on BC Labour Market Scenario Model and Conference Board of Canada 2012 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, Vancouver Island / Coast

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	-10	8	13	20	34	44	49	53	60	73	95
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	-1	4	7	11	16	20	23	27	31	36	43
Pursers and Flight Attendants (G712)/(NOC6432)	-5	-2	-3	-2	-1	0	0	0	1	2	5
Airline Sales and Service Agents (G713)/(NOC6433)	0	4	6	8	11	13	15	15	17	20	24
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	-1	0	0	-1	0	0	0	-1	-1	0	1
Air Transport Ramp Attendants (H737)/(NOC7437)	-1	-1	-2	-2	-2	-3	-3	-4	-4	-4	-4
All other Air Transportation Occupations	-2	3	4	7	10	13	14	15	17	20	26
Rail transportation	2	2	2	2	3	3	3	2	2	1	0
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	1	1	1	1	1	1	1	1	1	0	0
Railway Conductors and Brakemen/women (H722)/(NOC7362)	2	2	1	2	2	2	2	1	1	1	0
Other Transportation	9	-17	-6	20	50	77	85	95	107	120	128
Transportation Managers (A373)/(NOC0713)	6	5	6	6	7	7	8	8	8	8	9
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	0	0	1	1	2	2	2	3	3	3
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	-2	-3	-2	0	1	3	3	4	5	5	6
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	13	5	9	17	27	35	38	41	45	50	52
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	4	-1	-1	0	3	4	4	4	4	4	3
All other Transportation Occupations (excl. air)	-11	-24	-18	-4	11	26	30	36	43	50	55
Accommodation	-59	-94	-84	-23	109	247	303	354	404	452	498
Accommodation Service Managers (A222)/(NOC0632)	-7	-11	-12	-10	-2	6	10	13	16	18	20
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	-3	-3	-2	2	10	17	21	25	29	33	37
Chefs (G411)/(NOC6241)	5	3	1	1	2	3	2	1	0	-2	-3
Cooks (G412)/(NOC6242)	-2	-3	-2	0	4	8	11	13	15	17	19
Bartenders (G512)/(NOC6452)	-1	-1	-1	1	3	5	6	7	8	10	11
Food and Beverage Servers (G513)/(NOC6453)	-9	-8	-3	9	28	48	58	68	79	89	99
Hotel Front Desk Clerks (G715)/(NOC6435)	-8	-8	-3	8	28	48	60	71	82	94	105
Light Duty Cleaners (G931)/(NOC6661)	-17	-38	-48	-54	-43	-32	-41	-51	-63	-77	-92
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	2	0	0	3	9	15	17	19	22	24	26
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-3	-3	-2	2	8	15	18	22	25	28	31
All other occupations in accommodation	-17	-21	-13	14	63	114	141	166	192	218	243

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	-151	-219	-155	-30	172	487	625	762	890	1,002	1,049
Restaurant & food service manager (A221)/(NOC0631)	-17	-27	-25	-21	-10	10	18	26	32	38	38
Food Service Supervisors (G012)/(NOC6212)	-6	-8	-6	-2	4	13	17	21	25	28	30
Cashiers (G311)/(NOC6611)	-2	-6	-2	6	19	40	47	54	61	67	69
Chefs (G411)/(NOC6241)	0	-4	-2	3	12	26	30	34	38	41	40
Cooks (G412)/(NOC6242)	10	-6	-5	6	28	65	79	93	105	114	115
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	-7	-7	-3	4	12	24	30	37	42	48	51
Bartenders (G512)/(NOC6452)	-9	-9	-5	1	9	22	29	36	44	50	55
Food and Beverage Servers (G513)/(NOC6453)	-51	-54	-29	9	65	144	186	228	268	306	329
Bakers (G942)/(NOC6252)	-2	-4	-3	-3	-1	1	2	3	4	5	5
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-54	-60	-31	18	86	187	232	278	321	361	383
Delivery drivers (H714)/(NOC7414)	-3	-4	-3	-3	-1	1	2	3	4	4	5
All other Food and Beverage occupations	-9	-30	-39	-49	-51	-45	-47	-50	-54	-61	-71
Recreation and Entertainment	-2	-210	-196	-98	31	118	166	228	300	384	452
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	-6	-13	-13	-11	-9	-7	-6	-5	-4	-2	-1
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	0	-3	-3	-2	0	1	2	2	3	4	5
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	-5	-26	-22	-7	11	24	31	41	52	64	74
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	51	39	36	45	52	56	57	61	65	71	75
Cashiers (G311)/(NOC6611)	-4	-11	-10	-8	-4	-1	0	2	4	6	8
Security Guards and Related Occupations (G631)/(NOC6651)	-4	-8	-7	-6	-4	-3	-2	-1	0	2	3
Casino Occupations (G723)/(NOC6443)	0	-6	-6	-3	0	2	4	5	7	9	11
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	-15	-28	-26	-21	-13	-8	-5	-1	2	7	11
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	-2	-6	-6	-5	-3	-1	-1	0	1	2	3
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-1	-7	-7	-4	0	3	4	6	8	10	12
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	-5	-15	-13	-8	-1	4	7	11	15	19	23
All other Recreation and Entertainment occupations	-10	-126	-120	-68	2	48	74	107	146	190	227
Travel Services	-7	-4	-12	-20	-28	-32	-44	-57	-71	-82	-101
Retail Trade Managers (A211)/(NOC0621)	0	-1	-2	-4	-5	-6	-8	-9	-11	-12	-14
Travel Counsellors (G711)/(NOC6431)	-3	-3	-6	-10	-13	-15	-20	-26	-32	-37	-45
All other Travel Services Occupations	-4	-1	-4	-7	-10	-11	-16	-22	-28	-33	-41
Total Tourism and Related Industries	-217	-533	-438	-129	371	945	1,186	1,437	1,691	1,950	2,121

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 Vancouver Island region, along with industry stakeholders' expectation on the regional strength and development priorities in the near future. We 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 Vancouver Island region is projected to grow at an average compound rate of 1.0% per year between 2010 and 2020, which is much slower than the labour demand growth in the tourism and hospitality sector in BC over the same period (1.6% per year).

Within the sector in the region, employment in the air transportation and in other transportation industry is expected to grow faster than the average rate of the entire sector, while employment in the travel services industry is expected to grow much more slowly than the sector average. In total, about 4,710 new full-year jobs are expected to be generated in the region as a result of increased tourism activities between 2010 and 2020. This is equivalent to about 10% of all potential new full-year jobs potentially available in the province.

In addition, we have shown that a total of 9,750 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 67% 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. In fact, this region has the highest ratio of the number of replacement jobs. This implies that the average age of workers in the Vancouver Island region tourism and hospitality sector is the highest amongst their provincial counterparts, and therefore the pressure for employers to look for replacement workers adds to the tightness of the labour market.

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, Vancouver Island and the Province

Industry/Occupation	Van. Island/Coast			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Air transportation	290	540	2.0%	2,360	4,100	1.8%
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	60	140		520	960	
Pursers and Flight Attendants (G712)/(NOC6432)	50	80		400	670	
Airline Sales and Service Agents (G713)/(NOC6433)	60	100		490	830	
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	20	40		150	290	
Air Transport Ramp Attendants (H737)/(NOC7437)	20	30		130	220	
All other Air Transportation Occupations	80	150		660	1,130	
Rail transportation	10	30	0.7%	30	230	0.6%
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	0	10		10	100	
Railway Conductors and Brakemen/women (H722)/(NOC7362)	0	20		20	130	
Other Transportation	480	970	1.7%	3,850	7,260	1.6%
Transportation Managers (A373)/(NOC0713)	10	30		80	200	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	10	10		70	80	
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	20	30		150	270	
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	150	320		1,180	2,290	
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	60	130		510	990	
All other Transportation Occupations (excl. air)	230	450		1,840	3,430	
Accommodation	1,300	2,500	1.2%	7,560	11,030	1.7%
Accommodation Service Managers (A222)/(NOC0632)	110	280		520	1,090	
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	70	90		340	360	
Chefs (G411)/(NOC6241)	10	40		170	190	
Cooks (G412)/(NOC6242)	40	60		220	260	
Bartenders (G512)/(NOC6452)	20	10		80	50	
Food and Beverage Servers (G513)/(NOC6453)	160	130		780	560	
Hotel Front Desk Clerks (G715)/(NOC6435)	170	380		840	1,650	
Light Duty Cleaners (G931)/(NOC6661)	120	590		1,720	2,840	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	60	140		310	630	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	60	40		290	240	
All other occupations in accommodation	470	740		2,300	3,160	

Industry/Occupation	Van. Island/Coast			BC		Annual Grwth Rt
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	
Food & Beverage Services	1,650	3,570	0.7%	25,250	24,720	1.7%
Restaurant & food service manager (A221)/(NOC0631)	130	640		1,980	3,780	
Food Service Supervisors (G012)/(NOC6212)	40	140		680	890	
Cashiers (G311)/(NOC6611)	100	210		1,580	1,520	
Chefs (G411)/(NOC6241)	80	190		1,350	1,340	
Cooks (G412)/(NOC6242)	230	600		3,530	4,070	
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	50	80		790	550	
Bartenders (G512)/(NOC6452)	50	80		770	540	
Food and Beverage Servers (G513)/(NOC6453)	360	560		5,390	3,690	
Bakers (G942)/(NOC6252)	20	50		270	370	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	460	650		6,960	5,570	
Delivery drivers (H714)/(NOC7414)	10	70		220	390	
All other Food and Beverage occupations	110	300		1,740	2,010	
Recreation and Entertainment	930	1,600	1.3%	6,420	10,990	1.3%
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	20	70		170	440	
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	10	30		70	180	
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	110	130		740	850	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	60	90		430	610	
Cashiers (G311)/(NOC6611)	30	30		210	250	
Security Guards and Related Occupations (G631)/(NOC6651)	10	40		80	240	
Casino Occupations (G723)/(NOC6443)	20	50		520	1,040	
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	50	80		390	580	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	20	40		100	280	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	30	20		200	200	
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	40	80		300	540	
All other Recreation and Entertainment occupations	510	940		3,220	5,780	
Travel Services	50	540	0.3%	1,240	3,450	1.2%
Retail Trade Managers (A211)/(NOC0621)	0	40		80	250	
Travel Counsellors (G711)/(NOC6431)	20	190		450	1,240	
All other Travel Services Occupations	30	310		700	1,960	
Total Tourism and Related Industries	4,710	9,750	1.0%	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 shortage in the accommodation industry accounts for 23% of all shortages in that year in the tourism and hospitality sector, while shortage in the food and beverage services industry accounts for 49% of all shortages in that year in the sector. Expected shortage in the recreation and entertainment industry will account for 21% of the total shortages in the sector in that year.

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 370 full-year jobs) in 2014, gradually increasing to almost 5% of labour supply (or equivalent to 2,120 full year jobs) by 2020.⁵ 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. Occupations facing the most severe labour shortages include air pilots, flight engineers and flying instructors; transportation managers; retail sales persons; and to a lesser extent, bartenders and food and beverage servers.

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 9,800 full-year job openings for replacement needs, or about 980 openings to fill per year. This is in addition to a total of 4,700

⁵ 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.

full-year jobs (or about 470 full-year jobs per year) expected as a result of labour demand due to increased economic activities.

Also, because this analysis does not account for normal turnover in the workforce (employee quits and firings), these potential labour shortage estimates are very conservative, as turnover in tourism is a significant factor.

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.⁶ 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.

⁶ 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