

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

Cariboo-Chilcotin-Coast 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. Cariboo Chilcotin Coast

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

Also known as “the land without limits”, the Cariboo Chilcotin Coast tourism region stretches from the Pacific coast to the rolling Cariboo Mountains. This region actually encompasses three regions within its vast area. The *Cariboo* follows the routes of pioneers and goldpanners known as the Cariboo Wagon Road from Lillooet to Barkerville. The *Chilcotin* contains forests, lakes, rivers, mountains, ice fields and the flat plains/grasslands of the Chilcotin Plateau. It also includes Tweedsmuir Provincial Park, BC's largest. BC's central Coast is the western border of the region, covering 15,000km of private coves and inlets, pristine beaches and rocky shores. This part of the region offers some of the best saltwater fishing and wildlife viewing of sea birds, whales and porpoises in the world, as well as kayaking and boating in pristine waterways.

The Cariboo Chilcotin Coast has always had a wild-west and cowboy adventure spirit in its tourism theme. There are many guest ranches, lodges and guide outfitters based in this region. Barkerville is one of BC's most famous and popular historic sites. The Bowron Lake Canoe Circuit is well known internationally. The region also offers winter activities: nordic skiing, dog sledding, snowmobiling, as well as some downhill skiing and snowboarding (including heli). A possible sternwheeler operation in Williams Lake is the only major (potential) new tourism product anticipated for the region.

The tourism sector in the Cariboo Chilcotin Coast is primarily tied to the region's diverse natural features and the rural, historical setting of the region. Peak season is summer, with lower tourism volumes during the winter and very limited shoulder seasons. Operators in the Cariboo Chilcotin Coast are mostly smaller family-run operations and concentrated in hospitality services, including accommodation, food and beverage, and guiding. There are generally few retail stores. The profitability of these small businesses is highly sensitive to changes in economic and market conditions, dollar exchanges, use of the natural environment, seasonality, taxes, and operating costs. Although offering an abundance of quality fishing, horseback riding and other recreational opportunities, as many as 19 resorts/lodges actually closed within the last 10 years along Highway 24 - “The Fishing Highway”. In addition, due to the

importance of the land base to the sustainability of the region's tourism sector, the regional DMO has taken on an additional advocacy role around some of the issues of land use, tenure and rural resort taxation.

Visitation to the Cariboo Chilcotin Coast has declined since the 2008 economic recession and is just starting to show signs of some recovery. Many businesses have been forced to focus their main efforts on staying profitable and have reduced staff levels as a result. On the other hand, operators often cannot find and retain sufficient qualified staff when they need them. The region lacks access to a major population centre and anchor community for drawing employees. This is in addition to the issues of high seasonality and the remoteness of many operations. Also, few young people are pursuing tourism and hospitality careers in the region, due in part to limited tourism and hospitality training in the region. In addition, skills training and the economic focus in the region have been more oriented towards mining, logging and mechanics.

A number of tourism operators in the Cariboo Chilcotin Coast originate from Europe and cater specifically to the European tourist. They often draw some of their staff from overseas, as they are well-equipped and trained with the necessary skills and attitudes for their customer base. The abundance of significant local First Nations populations also offers good prospects for long term labour market development in this region.

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 growth in the Cariboo development region has been more positive than the provincial average. The information, culture and recreation industry and the accommodation and food services industry in the development region experienced much stronger employment growth than the provincial average in the same industries (4.4% compared with 3.6%, and 6.0% compared with 2.8% respectively). Employment in the transportation and warehousing industry, finance, insurance, real estate and leasing industry, business, building and other support services industry, has experienced decline between 2010 and 2012.

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

Employment ('000s)	BC			Annual Growth Rate 2010-12	Cariboo			Annual Growth Rate 2010-12
	2010	2011	2012		2010	2011	2012	
All Industries	2,256.5	2,274.7	2,312.5	1.2%	80.3	81.2	85.2	3.0%
Goods-Producing Sector	442.7	447.4	459.1	1.8%	22.3	21.1	27.4	10.8%
Agriculture	31.8	26.1	26.0	-9.6%	2.0	x	x	
Forestry, Fishing, Mining, Oil and Gas	40.6	40.1	46.1	6.6%	5.2	4.2	7.4	19.3%
Utilities	14.0	12.8	14.9	3.2%	x	x	x	
Construction	190.5	204.6	192.9	0.6%	6.1	6.6	7.0	7.1%
Manufacturing	165.8	163.9	179.2	4.0%	8.4	8.8	11.3	16.0%
Services-Producing Sector	1,813.8	1,827.2	1,853.4	1.1%	57.9	60.1	57.7	-0.2%
Trade	370.1	355.0	356.6	-1.8%	13.8	12.5	13.4	-1.5%
Transportation and Warehousing	118.6	124.1	128.9	4.3%	5.6	6.5	5.4	-1.8%
Finance, Insurance, Real Estate and Leasing	141.8	139.4	141.8	0.0%	3.0	3.4	2.5	-8.7%
Professional, Scientific and Technical Services	174.3	182.1	173.0	-0.4%	3.1	4.1	3.5	6.3%
Business, Building and Other Support Services	91.0	94.2	97.6	3.6%	2.3	2.4	2.1	-4.4%
Educational Services	167.3	167.1	177.3	2.9%	5.8	5.9	6.1	2.6%
Health Care and Social Assistance	264.2	261.3	274.5	1.9%	9.0	10.3	10.7	9.0%
Information, culture and recreation	108.1	109.4	116.0	3.6%	2.2	2.6	2.4	4.4%
Accommodation and food services	162.3	181.8	171.6	2.8%	5.2	5.9	5.8	5.6%
Other services	104.7	103.9	113.9	4.3%	4.4	3.1	3.2	-14.7%
Public administration	111.4	108.9	102.4	-4.1%	3.4	3.5	2.6	-12.6%

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 Cariboo development region, employment for all industries is projected to grow at an average rate of 0.5% 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 industry is projected to grow the fastest, and it will also grow slightly 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, Cariboo Development Region and BC

	Projected Annual Growth Rate 2010-2020	
	<u>BC</u>	<u>Cariboo</u>
All Industries Total	1.2%	0.5%
Transportation & Warehousing	1.4%	0.7%
Finance, Insurance & Real Estate	0.8%	-0.1%
Professional, Scientific & Managerial	1.8%	1.2%
Other Services	1.6%	0.0%
Accommodation & Food Services	1.7%	2.0%

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

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	557	635	518	579	584	588	597	596	599	604	625
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	123	140	114	127	129	129	131	131	132	133	138
Purser and Flight Attendants (G712)/(NOC6432)	94	107	87	98	98	99	101	100	101	102	105
Airline Sales and Service Agents (G713)/(NOC6433)	116	133	108	121	122	123	125	125	125	126	131
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	38	44	36	40	40	41	41	41	41	42	43
Air Transport Ramp Attendants (H737)/(NOC7437)	32	37	30	33	34	34	34	34	34	35	36
All other Air Transportation Occupations	154	175	143	160	161	162	165	164	165	167	172
Rail transportation	29	33	27	30	30	30	30	29	29	29	29
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	13	15	12	13	13	14	14	13	13	13	13
Railway Conductors and Brakemen/women (H722)/(NOC7362)	16	18	15	16	16	16	16	16	16	16	16
Other Transportation	1,084	1,208	986	1,108	1,118	1,128	1,146	1,145	1,150	1,156	1,183
Transportation Managers (A373)/(NOC0713)	21	23	19	22	22	22	22	22	22	22	23
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	20	22	18	20	20	20	21	21	21	21	21
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	47	52	42	48	48	48	49	49	49	50	51
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	330	368	300	338	341	344	349	349	350	353	361
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	138	154	126	141	143	144	146	146	147	148	151
All other Transportation Occupations (excl. air)	528	588	480	539	544	549	558	557	560	563	576
Accommodation	1,547	1,571	1,652	1,732	1,734	1,745	1,737	1,763	1,768	1,781	1,791
Accommodation Service Managers (A222)/(NOC0632)	111	113	119	124	124	125	125	127	127	128	129
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	76	77	81	85	85	85	85	86	87	87	88
Chefs (G411)/(NOC6241)	29	30	31	33	33	33	33	33	33	34	34
Cooks (G412)/(NOC6242)	46	46	49	51	51	52	51	52	52	53	53
Bartenders (G512)/(NOC6452)	18	19	20	20	21	21	21	21	21	21	21
Food and Beverage Servers (G513)/(NOC6453)	168	170	179	188	188	189	188	191	192	193	194
Hotel Front Desk Clerks (G715)/(NOC6435)	181	184	194	203	203	204	204	206	207	209	210
Light Duty Cleaners (G931)/(NOC6661)	296	300	316	331	332	334	332	337	338	341	343
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	66	67	70	74	74	74	74	75	75	76	76
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	63	64	67	70	71	71	71	72	72	72	73
All other occupations in accommodation	494	502	527	553	553	557	554	562	564	568	571

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	4,296	4,397	4,659	4,910	4,924	4,987	5,003	5,116	5,171	5,243	5,293
Restaurant & food service manager (A221)/(NOC0631)	334	342	362	381	382	387	388	397	401	407	411
Food Service Supervisors (G012)/(NOC6212)	116	119	126	133	133	135	135	138	140	142	143
Cashiers (G311)/(NOC6611)	269	275	292	308	308	312	313	320	324	328	332
Chefs (G411)/(NOC6241)	187	192	203	214	215	217	218	223	226	229	231
Cooks (G412)/(NOC6242)	598	612	649	684	686	695	697	713	721	731	738
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	137	141	149	157	157	159	160	164	165	168	169
Bartenders (G512)/(NOC6452)	138	141	150	158	158	160	160	164	166	168	170
Food and Beverage Servers (G513)/(NOC6453)	934	956	1,013	1,068	1,071	1,084	1,088	1,112	1,124	1,140	1,151
Bakers (G942)/(NOC6252)	44	45	48	51	51	51	52	53	53	54	55
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	1,201	1,230	1,303	1,373	1,377	1,394	1,399	1,430	1,446	1,466	1,480
Delivery drivers (H714)/(NOC7414)	38	38	41	43	43	44	44	45	45	46	46
All other Food and Beverage occupations	299	306	324	342	343	347	348	356	360	365	368
Recreation and Entertainment	1,422	1,199	1,104	1,351	1,368	1,362	1,344	1,346	1,353	1,371	1,385
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	38	32	30	36	37	36	36	36	36	37	37
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	18	15	14	17	17	17	17	17	17	17	17
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	165	139	128	157	158	158	156	156	157	159	160
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	84	71	66	80	81	81	80	80	80	81	82
Cashiers (G311)/(NOC6611)	46	39	36	44	45	44	44	44	44	45	45
Security Guards and Related Occupations (G631)/(NOC6651)	22	19	17	21	21	21	21	21	21	21	22
Casino Occupations (G723)/(NOC6443)	88	74	68	84	85	84	83	83	84	85	86
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	87	73	68	83	84	83	82	82	83	84	85
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	25	21	19	23	24	24	23	23	23	24	24
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	43	37	34	41	42	41	41	41	41	42	42
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	70	59	54	66	67	67	66	66	66	67	68
All other Recreation and Entertainment occupations	736	621	571	699	708	705	696	696	701	710	717
Travel Services	208	245	219	226	224	223	219	220	218	217	219
Retail Trade Managers (A211)/(NOC0621)	14	16	15	15	15	15	15	15	15	15	15
Travel Counsellors (G711)/(NOC6431)	78	92	82	85	84	83	82	82	81	81	82
All other Travel Services Occupations	116	137	123	127	126	125	123	123	122	121	123
Total Tourism and Related Industries	9,142	9,289	9,164	9,936	9,981	10,063	10,077	10,214	10,289	10,402	10,525

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 food and beverage services industry, and accommodation 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 (287);
- Food and beverage servers (243);
- Cooks (147);
- Restaurant and food service managers (77);
- Cashiers (61);
- Chefs (48);
- Light duty cleaners (47);
- Bartenders (35);
- Bus drivers (31); and
- Hotel Front Desk Clerks (29).

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, Cariboo, 2011 to 2020

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Air transportation	68	176	244
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	15	42	57
Pursers and Flight Attendants (G712)/(NOC6432)	11	28	40
Airline Sales and Service Agents (G713)/(NOC6433)	14	35	49
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	5	13	18
Air Transport Ramp Attendants (H737)/(NOC7437)	4	9	13
All other Air Transportation Occupations	19	48	67
Rail transportation	0	10	10
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	0	5	5
Railway Conductors and Brakemen/women (H722)/(NOC7362)	0	6	5
Other Transportation	99	350	450
Transportation Managers (A373)/(NOC0713)	2	9	11
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	2	4	6
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	4	12	16
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	31	113	143
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	13	47	60
All other Transportation Occupations (excl. air)	48	166	214
Accommodation	244	377	621
Accommodation Service Managers (A222)/(NOC0632)	17	41	59
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	12	14	26
Chefs (G411)/(NOC6241)	5	5	10
Cooks (G412)/(NOC6242)	7	8	15
Bartenders (G512)/(NOC6452)	3	2	5
Food and Beverage Servers (G513)/(NOC6453)	26	17	43
Hotel Front Desk Clerks (G715)/(NOC6435)	29	57	86
Light Duty Cleaners (G931)/(NOC6661)	47	98	144
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	10	22	32
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	10	5	15
All other occupations in accommodation	78	108	186

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Food & Beverage Services	996	684	1,680
Restaurant & food service manager (A221)/(NOC0631)	77	128	205
Food Service Supervisors (G012)/(NOC6212)	27	30	57
Cashiers (G311)/(NOC6611)	62	59	121
Chefs (G411)/(NOC6241)	44	35	79
Cooks (G412)/(NOC6242)	140	112	252
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	32	14	46
Bartenders (G512)/(NOC6452)	32	14	46
Food and Beverage Servers (G513)/(NOC6453)	217	97	313
Bakers (G942)/(NOC6252)	10	11	21
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	278	108	386
Delivery drivers (H714)/(NOC7414)	9	14	23
All other Food and Beverage occupations	69	61	131
Recreation and Entertainment	-36	300	264
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	-1	12	11
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	0	6	6
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	-4	26	22
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	-2	16	13
Cashiers (G311)/(NOC6611)	-1	8	7
Security Guards and Related Occupations (G631)/(NOC6651)	-1	7	6
Casino Occupations (G723)/(NOC6443)	-2	25	23
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	-2	16	14
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	-1	7	6
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-1	3	2
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	-2	10	8
All other Recreation and Entertainment occupations	-19	164	146
Travel Services	12	72	83
Retail Trade Managers (A211)/(NOC0621)	1	6	7
Travel Counsellors (G711)/(NOC6431)	4	24	28
All other Travel Services Occupations	6	42	49
Total Tourism and Related Industries	1,383	1,969	3,352

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 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 (116);
- Food and beverage servers (113);
- Restaurant and food service managers (128);
- Cooks (120);
- Bus drivers (113);
- Light duty cleaners (98);
- Cashiers (67);
- Hotel front desk clerks (57);
- Taxi and Limousine Drivers and Chauffeurs (47); and
- Accommodation Service Managers (41).

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 Cariboo development region, labour force growth is projected to be at an average rate of 0.5% per year between 2010 and 2020, similar to the projected employment growth rate of 0.5% 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, Cariboo

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	561	631	513	572	571	571	578	576	576	577	589
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	123	138	112	125	125	125	126	126	125	126	128
Pursers and Flight Attendants (G712)/(NOC6432)	95	107	87	97	97	97	99	99	99	99	102
Airline Sales and Service Agents (G713)/(NOC6433)	117	132	107	118	118	118	119	118	118	118	120
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	38	43	35	39	39	40	40	40	40	40	41
Air Transport Ramp Attendants (H737)/(NOC7437)	32	37	30	33	34	34	34	34	34	34	35
All other Air Transportation Occupations	155	175	142	158	158	158	160	159	159	160	163
Rail transportation	28	32	26	29	29	29	29	29	28	28	29
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	13	15	12	13	13	13	13	13	13	13	13
Railway Conductors and Brakemen/women (H722)/(NOC7362)	15	17	14	16	16	16	16	16	16	15	16
Other Transportation	1,080	1,215	988	1,100	1,099	1,099	1,113	1,109	1,109	1,112	1,135
Transportation Managers (A373)/(NOC0713)	21	24	19	21	21	21	22	22	22	22	22
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	19	22	18	20	20	20	20	20	20	20	21
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	46	52	43	47	47	48	48	48	48	48	50
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	329	370	300	334	332	332	335	333	332	332	338
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	138	157	129	146	147	149	153	154	156	158	163
All other Transportation Occupations (excl. air)	526	590	479	532	530	529	535	532	531	531	541
Accommodation	1,556	1,586	1,667	1,736	1,716	1,705	1,688	1,704	1,702	1,708	1,711
Accommodation Service Managers (A222)/(NOC0632)	112	114	121	126	125	124	123	125	125	125	126
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	76	78	82	85	84	83	82	83	83	83	83
Chefs (G411)/(NOC6241)	29	30	31	32	32	32	31	32	32	32	32
Cooks (G412)/(NOC6242)	46	47	49	51	50	50	49	50	50	50	50
Bartenders (G512)/(NOC6452)	19	19	20	20	20	20	19	19	19	19	19
Food and Beverage Servers (G513)/(NOC6453)	169	172	180	187	184	183	181	182	182	182	182
Hotel Front Desk Clerks (G715)/(NOC6435)	183	186	195	202	199	198	195	197	196	196	196
Light Duty Cleaners (G931)/(NOC6661)	295	303	320	335	333	332	331	336	337	340	342
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	66	68	71	74	73	72	71	71	71	71	71
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	63	64	68	70	69	69	68	68	68	68	68
All other occupations in accommodation	498	507	532	554	547	543	537	542	541	542	543

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	4,326	4,441	4,695	4,917	4,886	4,878	4,863	4,942	4,968	5,015	5,054
Restaurant & food service manager (A221)/(NOC0631)	337	347	367	385	383	383	382	387	389	392	395
Food Service Supervisors (G012)/(NOC6212)	117	120	127	132	131	131	130	132	133	134	135
Cashiers (G311)/(NOC6611)	271	280	296	311	310	311	312	319	323	328	333
Chefs (G411)/(NOC6241)	187	193	204	214	213	214	213	216	217	219	221
Cooks (G412)/(NOC6242)	599	616	653	685	682	683	680	691	695	701	707
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	138	141	149	156	155	154	154	157	158	160	161
Bartenders (G512)/(NOC6452)	139	142	149	155	153	152	150	152	151	152	152
Food and Beverage Servers (G513)/(NOC6453)	941	963	1,015	1,060	1,050	1,045	1,039	1,054	1,057	1,065	1,071
Bakers (G942)/(NOC6252)	45	46	49	51	51	51	51	52	52	53	54
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	1,211	1,240	1,307	1,365	1,353	1,347	1,340	1,360	1,365	1,376	1,385
Delivery drivers (H714)/(NOC7414)	38	39	41	43	42	42	42	43	43	43	43
All other Food and Beverage occupations	302	315	338	359	362	366	369	379	384	392	399
Recreation and Entertainment	1,422	1,237	1,137	1,370	1,362	1,339	1,312	1,301	1,296	1,299	1,302
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	38	33	31	37	37	37	36	36	36	36	36
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	18	15	14	17	17	17	16	16	16	16	16
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	165	143	131	158	156	153	150	149	148	148	148
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	85	74	68	82	82	81	79	79	79	79	79
Cashiers (G311)/(NOC6611)	46	40	37	45	45	44	43	43	43	44	44
Security Guards and Related Occupations (G631)/(NOC6651)	22	19	18	21	21	21	20	20	20	20	20
Casino Occupations (G723)/(NOC6443)	88	77	70	85	84	83	81	81	81	81	81
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	86	75	69	83	83	81	79	79	79	79	79
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	25	21	20	24	24	23	23	23	23	23	23
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	43	38	35	42	42	41	40	40	40	40	40
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	70	60	55	66	65	64	62	61	60	59	59
All other Recreation and Entertainment occupations	736	640	589	710	706	695	681	676	673	675	677
Travel Services	209	246	221	229	228	227	225	228	227	228	233
Retail Trade Managers (A211)/(NOC0621)	14	17	15	16	16	16	16	16	16	16	16
Travel Counsellors (G711)/(NOC6431)	78	92	82	85	85	85	84	85	85	85	86
All other Travel Services Occupations	117	138	123	128	128	127	126	127	127	127	130
Total Tourism and Related Industries	9,182	9,389	9,247	9,953	9,890	9,848	9,808	9,888	9,908	9,967	10,052

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, Cariboo

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	-4	4	4	8	13	17	19	20	23	27	36
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	0	2	2	2	4	4	5	6	6	8	10
Pursers and Flight Attendants (G712)/(NOC6432)	-1	0	0	0	1	2	2	2	2	2	3
Airline Sales and Service Agents (G713)/(NOC6433)	-1	1	2	3	4	5	6	6	7	8	10
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	0	0	0	1	1	1	1	1	1	2	2
Air Transport Ramp Attendants (H737)/(NOC7437)	0	0	0	0	0	0	0	0	0	0	1
All other Air Transportation Occupations	-2	0	1	2	3	4	5	5	6	7	9
Rail transportation	1	1	1	1	1	1	1	1	1	0	0
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	0	0	0	0	0	0	0	0	0	0	0
Railway Conductors and Brakemen/women (H722)/(NOC7362)	1	1	0	1	1	1	1	1	0	0	0
Other Transportation	4	-7	-2	7	19	29	32	36	40	45	48
Transportation Managers (A373)/(NOC0713)	0	0	0	0	0	1	1	1	1	1	1
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	0	0	0	0	0	0	0	1	1	1
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	0	0	0	0	1	1	1	1	1	1	1
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	1	-2	0	4	8	12	14	16	18	21	23
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	0	-3	-3	-4	-5	-5	-7	-8	-9	-10	-12
All other Transportation Occupations (excl. air)	2	-2	1	8	14	20	23	26	29	32	35
Accommodation	-9	-15	-15	-4	18	41	50	58	66	73	80
Accommodation Service Managers (A222)/(NOC0632)	-1	-2	-2	-2	0	1	1	2	2	3	3
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	-1	-1	-1	0	1	2	3	3	4	4	5
Chefs (G411)/(NOC6241)	0	0	0	0	1	1	1	2	2	2	2
Cooks (G412)/(NOC6242)	0	0	0	0	1	2	2	2	3	3	3
Bartenders (G512)/(NOC6452)	0	0	0	0	1	1	1	2	2	2	2
Food and Beverage Servers (G513)/(NOC6453)	-1	-1	-1	1	3	6	7	9	10	11	12
Hotel Front Desk Clerks (G715)/(NOC6435)	-1	-2	-1	1	4	7	8	10	11	12	13
Light Duty Cleaners (G931)/(NOC6661)	0	-2	-4	-4	-1	1	1	1	1	1	0
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	-1	-1	-1	0	1	2	3	4	4	5	6
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-1	-1	0	0	1	2	3	3	4	4	5
All other occupations in accommodation	-4	-5	-5	-1	7	14	18	21	24	26	29

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	-30	-44	-35	-7	38	109	140	174	204	228	239
Restaurant & food service manager (A221)/(NOC0631)	-3	-5	-5	-4	-1	4	7	10	12	15	16
Food Service Supervisors (G012)/(NOC6212)	-1	-1	-1	0	2	4	5	6	7	8	8
Cashiers (G311)/(NOC6611)	-2	-4	-5	-4	-2	2	1	1	1	0	-2
Chefs (G411)/(NOC6241)	0	-1	-1	0	1	4	5	7	8	9	10
Cooks (G412)/(NOC6242)	0	-4	-4	-1	4	12	17	22	26	30	31
Maîtres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	-1	-1	0	1	3	5	6	7	8	8	8
Bartenders (G512)/(NOC6452)	-1	-1	0	2	5	8	10	12	14	17	18
Food and Beverage Servers (G513)/(NOC6453)	-7	-7	-2	8	21	40	49	59	67	75	80
Bakers (G942)/(NOC6252)	0	-1	-1	-1	0	0	1	1	1	1	1
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-10	-10	-4	8	24	48	59	70	81	90	95
Delivery drivers (H714)/(NOC7414)	0	0	0	0	1	1	2	2	2	3	3
All other Food and Beverage occupations	-3	-9	-13	-17	-19	-19	-21	-23	-25	-27	-31
Recreation and Entertainment	-1	-37	-34	-19	6	23	32	44	57	72	84
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	0	-1	-1	-1	0	0	0	0	1	1	1
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	0	0	0	0	0	0	0	0	1	1	1
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	-1	-4	-3	-1	2	5	6	7	9	11	12
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	-3	-3	-2	-1	0	0	1	2	2	3
Cashiers (G311)/(NOC6611)	0	-1	-1	-1	0	0	0	1	1	1	1
Security Guards and Related Occupations (G631)/(NOC6651)	0	0	0	0	0	1	1	1	1	2	2
Casino Occupations (G723)/(NOC6443)	0	-2	-2	-1	0	1	2	2	3	4	5
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	1	-2	-1	0	1	2	3	3	4	5	6
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	-1	-1	0	0	0	0	0	1	1	1
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	0	-1	-1	-1	0	1	1	1	2	2	2
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	0	-2	-1	0	2	3	4	5	6	8	9
All other Recreation and Entertainment occupations	0	-20	-18	-11	2	10	15	21	27	35	41
Travel Services	-1	-1	-2	-3	-4	-4	-6	-8	-10	-11	-13
Retail Trade Managers (A211)/(NOC0621)	0	0	0	0	-1	-1	-1	-1	-1	-1	-1
Travel Counsellors (G711)/(NOC6431)	0	0	0	-1	-1	-1	-2	-2	-3	-4	-5
All other Travel Services Occupations	0	0	-1	-2	-2	-2	-3	-4	-5	-6	-7
Total Tourism and Related Industries	-40	-99	-82	-16	91	215	268	326	381	435	473

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 Cariboo Chilcotin Coast 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 Cariboo Chilcotin Coast region is projected to grow at an average compound rate of 1.4% per year between 2010 and 2020, which is slightly more slowly 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 food and beverage services industry is expected to grow faster than the average rate of the entire sector, while employment in rail transportation and in the recreation and entertainment industry is expected to experience little growth at all. In total, about 1,380 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 2,000 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 59% 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 Cariboo Chilcotin Coast region tourism and hospitality sector is the higher than 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, Cariboo Chilcotin Coast and the Province

Industry/Occupation	Cariboo			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Air transportation	70	180	1.2%	2,360	4,100	1.8%
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	20	40		520	960	
Pursers and Flight Attendants (G712)/(NOC6432)	10	30		400	670	
Airline Sales and Service Agents (G713)/(NOC6433)	10	40		490	830	
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	0	10		150	290	
Air Transport Ramp Attendants (H737)/(NOC7437)	0	10		130	220	
All other Air Transportation Occupations	20	50		660	1,130	
Rail transportation	0	10	-0.1%	30	230	0.6%
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	0	0		10	100	
Railway Conductors and Brakemen/women (H722)/(NOC7362)	0	10		20	130	
Other Transportation	100	350	0.9%	3,850	7,260	1.6%
Transportation Managers (A373)/(NOC0713)	0	10		80	200	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	0		70	80	
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	0	10		150	270	
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	30	110		1,180	2,290	
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	10	50		510	990	
All other Transportation Occupations (excl. air)	50	170		1,840	3,430	
Accommodation	240	390	1.5%	7,560	11,030	1.7%
Accommodation Service Managers (A222)/(NOC0632)	20	40		520	1,090	
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	10	10		340	360	
Chefs (G411)/(NOC6241)	0	10		170	190	
Cooks (G412)/(NOC6242)	10	10		220	260	
Bartenders (G512)/(NOC6452)	0	0		80	50	
Food and Beverage Servers (G513)/(NOC6453)	30	20		780	560	
Hotel Front Desk Clerks (G715)/(NOC6435)	30	60		840	1,650	
Light Duty Cleaners (G931)/(NOC6661)	50	100		1,720	2,840	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	10	20		310	630	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	10	10		290	240	
All other occupations in accommodation	80	110		2,300	3,160	

Industry/Occupation	Cariboo			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Food & Beverage Services	1,000	680	2.1%	25,250	24,720	1.7%
Restaurant & food service manager (A221)/(NOC0631)	80	130		1,980	3,780	
Food Service Supervisors (G012)/(NOC6212)	30	30		680	890	
Cashiers (G311)/(NOC6611)	60	60		1,580	1,520	
Chefs (G411)/(NOC6241)	40	40		1,350	1,340	
Cooks (G412)/(NOC6242)	140	110		3,530	4,070	
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	30	10		790	550	
Bartenders (G512)/(NOC6452)	30	10		770	540	
Food and Beverage Servers (G513)/(NOC6453)	220	100		5,390	3,690	
Bakers (G942)/(NOC6252)	10	10		270	370	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	280	110		6,960	5,570	
Delivery drivers (H714)/(NOC7414)	10	10		220	390	
All other Food and Beverage occupations	70	60		1,740	2,010	
Recreation and Entertainment	-40	320	-0.3%	6,420	10,990	1.3%
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	0	10		170	440	
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	0	10		70	180	
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	0	30		740	850	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	20		430	610	
Cashiers (G311)/(NOC6611)	0	10		210	250	
Security Guards and Related Occupations (G631)/(NOC6651)	0	10		80	240	
Casino Occupations (G723)/(NOC6443)	0	30		520	1,040	
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	0	20		390	580	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	10		100	280	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	0	0		200	200	
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	0	10		300	540	
All other Recreation and Entertainment occupations	-20	160		3,220	5,780	
Travel Services	10	70	0.5%	1,240	3,450	1.2%
Retail Trade Managers (A211)/(NOC0621)	0	10		80	250	
Travel Counsellors (G711)/(NOC6431)	0	20		450	1,240	
All other Travel Services Occupations	10	40		700	1,960	
Total Tourism and Related Industries	1,380	2,000	1.4%	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 will account for 17% 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. Expected shortage in the recreation and entertainment industry will account for 18% 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 in 2014 (or equivalent to 90 full-year jobs), gradually increasing to almost 5% of labour supply by 2020 (or equivalent to 470 full-year jobs).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. 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

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.

there are expected to be a total of 2,000 full-year job openings for replacement needs, or about 200 openings to fill per year. This is in addition to a total of 1,400 full-year jobs (or about 140 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