

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

Northern British Columbia 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. Northern BC

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

Northern BC comprises vast wilderness and is the largest tourism region in BC. It is all the area north of Prince George and encompasses northeastern BC, northwestern BC and Haida Gwaii (formerly the Queen Charlotte Islands). Dawson Creek is Mile 0 of the Alaska Highway, the more than 2,000 km historical route that ends in Delta Junction Alaska.

The landscape of Northern BC is stunning and includes mountain ranges which dominate the northern landscape along with rivers, lakes, valleys, hot springs, rugged coastlines and island archipelagos. Much of Northern BC is preserved and protected by a world-class system of provincial parks and nature reserves. In addition to touring, which is the number one tourism activity in the region, there are many products focused around the outdoor experience. The most popular ones are freshwater and saltwater fishing, hunting and soft adventure which includes horseback riding, hiking, fishing and canoe/kayaking. The region has unique wildlife viewing opportunities, i.e. grizzly bears. Northern BC also offers winter sports: alpine and nordic skiing, snowboarding, snowmobiling, etc. Aboriginal tourism is a key component of the Haida Gwaii experience and is also a consistent element throughout the northwestern part of the tourism region.

From a more urban perspective, the University of North BC in Prince George has become a significant economic generator. While attracting students from across Canada and even the world, this also brings in academic professionals and all their friends, family, colleagues etc. who may visit. Prince George similarly acts as a regional hub for business and conference/meetings travel. Sports tourism, such as tournaments and events has also been identified as a growth opportunity.

The region's two largest geographic target markets are the western provinces of BC and the western US. The region also has large appeal to European visitors fascinated by what seems like the "final frontier". Tourist visitation to Northern BC suffered at the time of the recent recession and visitor growth ever since has been very flat. There appears potential for upward movement in the 3-5% range,

much of this fuelled by the economic boom the North has experienced in the resource sector.

The increase in natural resource activity has, of course, been a huge economic gain for many Northerners and their livelihood. In the tourism sector, it has helped with seasonality problems but has also stirred up longtime challenges around the land base and new ones on the labour front. While it is not new for tourism to compete with higher paying industries, now many of the resource companies are also filling the hotels and restaurants with their staff and contractors who require long term accommodation. This makes it more difficult for visitors during the tourist season.

Prince George has some additional hotel development on the way, which will help relieve pressure on the accommodation supply side. Economic expansion is happening quickly in other communities as well, including: Prince Rupert, Terrace, Kitimat, Tumbler Ridge and Fort St. John. Food and beverage workers are lured by the resource sector which has made otherwise remote camps more comfortable by providing better quality food service as well as overall improved accommodations and services/facilities.

Many food and beverage operators in Northern BC communities have had to rely on foreign workers from Mexico, Central America and/or the Philippines because there is such a limited supply of local/regional workers and youth. In some cases there are potential workers unwilling to work in tourism and hospitality and/or are completely without the appropriate skill set. The labour market situation in Northern BC is among the tightest in the province and not expected to improve for some time.

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 Northern BC development regions (comprising the North Coast, Nechako, and Northeast development regions) has been slower than the provincial average. It should be noted that in the chart below, the sign “-” refers to industries where employment values in one or two of the development regions were lower than 1,500, and as such there is not enough information to show values in these cells.

Where data are available, it is shown that accommodation and food services industry in the Northern BC development regions, as well as the transportation and warehousing industry, experienced much slower employment growth than the provincial average in the same industries (-1.2% compared with 2.8%, and -1.8% compared with 4.3%).

Figure 1: Employment in Tourism and Hospitality Related Industries, North Coast, Nechako, and Northeast Development Regions Combined and BC

Employment ('000s)	BC			Annual Growth Rate 2010-12	Northern BC			Annual Growth Rate 2010-12
	2010	2011	2012		2010	2011	2012	
All Industries	2,256.5	2,274.7	2,312.5	1.2%	77.4	80.5	79.0	1.0%
Goods-Producing Sector	442.7	447.4	459.1	1.8%	23.9	21.9	24.1	0.4%
Agriculture	31.8	26.1	26.0	-9.6%	-	-	-	
Forestry, Fishing, Mining, Oil and Gas	40.6	40.1	46.1	6.6%	9.4	6.4	6.9	-14.3%
Utilities	14.0	12.8	14.9	3.2%	-	-	-	
Construction	190.5	204.6	192.9	0.6%	6.2	6.9	9.5	23.8%
Manufacturing	165.8	163.9	179.2	4.0%	7.2	6.9	6.7	-3.5%
Services-Producing Sector	1,813.8	1,827.2	1,853.4	1.1%	53.6	58.5	54.8	1.1%
Trade	370.1	355.0	356.6	-1.8%	12.8	11.5	11.5	-5.2%
Transportation and Warehousing	118.6	124.1	128.9	4.3%	5.5	6.8	5.3	-1.8%
Finance, Insurance, Real Estate and Leasing	141.8	139.4	141.8	0.0%	-	-	-	
Professional, Scientific and Technical Services	174.3	182.1	173.0	-0.4%	4.7	4.4	3.8	-10.1%
Business, Building and Other Support Services	91.0	94.2	97.6	3.6%	-	-	1.7	
Educational Services	167.3	167.1	177.3	2.9%	4.6	7.3	6.3	17.0%
Health Care and Social Assistance	264.2	261.3	274.5	1.9%	8.4	8.2	7.2	-7.4%
Information, culture and recreation	108.1	109.4	116.0	3.6%	-	-	-	
Accommodation and food services	162.3	181.8	171.6	2.8%	4.3	4.8	4.2	-1.2%
Other services	104.7	103.9	113.9	4.3%	-	5.3	4.6	
Public administration	111.4	108.9	102.4	-4.1%	-	-	-	

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 Northern BC (combining three development regions – North Coast, Nechako, and Northeast), employment for all industries is projected to grow at an average rate of 1.3% per year between 2010 and 2020, similar to the projected provincial average of 1.2% per year. Of the five broad tourism and hospitality related

industry groups, transportation and warehousing industry and other services industry are projected to grow much faster than the provincial average for that industry. In finance, insurance and real estate industry, on the other hand, employment is projected to decline over the period of analysis. The other two industry groups are projected to grow at rates similar to 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, Northern BC Development Regions and BC

	Projected Annual Growth Rate 2010-2020	
	<u>BC</u>	<u>Northern BC</u>
All Industries Total	1.2%	1.3%
Transportation & Warehousing	1.4%	2.2%
Finance, Insurance & Real Estate	0.8%	-0.2%
Professional, Scientific & Managerial	1.8%	1.9%
Other Services	1.6%	2.2%
Accommodation & Food Services	1.7%	1.9%

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, Northern BC

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	547	664	508	629	634	638	636	655	668	694	716
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	120	146	112	138	139	140	140	144	147	153	158
Purser and Flight Attendants (G712)/(NOC6432)	92	112	86	106	107	107	107	110	113	117	121
Airline Sales and Service Agents (G713)/(NOC6433)	114	139	106	131	132	133	133	137	140	145	150
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	38	46	35	43	44	44	44	45	46	48	49
Air Transport Ramp Attendants (H737)/(NOC7437)	32	38	29	36	36	37	37	38	38	40	41
All other Air Transportation Occupations	151	183	140	173	175	176	175	181	184	191	197
Rail transportation	29	34	26	32	32	32	32	32	32	33	33
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	13	16	12	15	15	15	14	15	15	15	15
Railway Conductors and Brakemen/women (H722)/(NOC7362)	16	19	14	18	18	18	18	18	18	18	18
Other Transportation	1,064	1,264	968	1,202	1,213	1,224	1,221	1,258	1,283	1,329	1,355
Transportation Managers (A373)/(NOC0713)	21	25	19	23	24	24	24	24	25	26	26
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	19	23	17	22	22	22	22	23	23	24	24
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	46	54	42	52	52	53	52	54	55	57	58
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	324	385	295	366	370	373	372	384	391	405	413
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	136	161	124	153	155	156	156	161	164	170	173
All other Transportation Occupations (excl. air)	518	616	471	585	591	596	595	613	624	647	660
Accommodation	1,232	1,240	1,168	1,396	1,406	1,423	1,399	1,405	1,442	1,459	1,501
Accommodation Service Managers (A222)/(NOC0632)	88	89	84	100	101	102	100	101	104	105	108
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	60	61	57	68	69	70	68	69	71	71	73
Chefs (G411)/(NOC6241)	23	23	22	26	26	27	26	26	27	27	28
Cooks (G412)/(NOC6242)	36	37	34	41	42	42	41	42	43	43	44
Bartenders (G512)/(NOC6452)	15	15	14	17	17	17	17	17	17	17	18
Food and Beverage Servers (G513)/(NOC6453)	133	134	126	151	152	154	151	152	156	158	163
Hotel Front Desk Clerks (G715)/(NOC6435)	144	145	137	163	165	167	164	165	169	171	176
Light Duty Cleaners (G931)/(NOC6661)	235	237	223	267	269	272	267	269	276	279	287
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	52	53	50	59	60	61	60	60	61	62	64
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	50	50	47	57	57	58	57	57	59	59	61
All other occupations in accommodation	393	396	373	445	449	454	446	448	460	466	479

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	3,587	3,603	3,391	4,042	4,045	4,090	4,023	4,045	4,156	4,207	4,317
Restaurant & food service manager (A221)/(NOC0631)	279	280	263	314	314	318	312	314	323	327	335
Food Service Supervisors (G012)/(NOC6212)	97	97	92	109	109	111	109	109	112	114	117
Cashiers (G311)/(NOC6611)	225	226	212	253	253	256	252	253	260	264	270
Chefs (G411)/(NOC6241)	156	157	148	176	176	178	175	176	181	183	188
Cooks (G412)/(NOC6242)	500	502	472	563	564	570	561	564	579	587	602
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	115	115	108	129	129	131	129	129	133	134	138
Bartenders (G512)/(NOC6452)	115	116	109	130	130	131	129	130	133	135	138
Food and Beverage Servers (G513)/(NOC6453)	780	783	737	879	880	889	875	879	904	915	939
Bakers (G942)/(NOC6252)	37	37	35	42	42	42	41	42	43	43	45
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	1,003	1,008	948	1,130	1,131	1,144	1,125	1,131	1,162	1,176	1,207
Delivery drivers (H714)/(NOC7414)	31	31	30	35	35	36	35	35	36	37	38
All other Food and Beverage occupations	250	251	236	281	282	285	280	281	289	293	300
Recreation and Entertainment	1,228	1,452	1,281	1,406	1,406	1,399	1,381	1,361	1,412	1,431	1,490
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	33	39	34	38	38	37	37	36	38	38	40
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	15	18	16	17	17	17	17	17	18	18	18
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	142	168	148	163	163	162	160	158	164	166	173
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	73	86	76	84	84	83	82	81	84	85	89
Cashiers (G311)/(NOC6611)	40	47	42	46	46	46	45	44	46	47	49
Security Guards and Related Occupations (G631)/(NOC6651)	19	23	20	22	22	22	22	21	22	22	23
Casino Occupations (G723)/(NOC6443)	76	90	79	87	87	87	85	84	87	89	92
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	75	89	78	86	86	86	84	83	86	88	91
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	21	25	22	24	24	24	24	24	24	25	26
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	37	44	39	43	43	43	42	41	43	44	45
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	60	71	63	69	69	68	68	67	69	70	73
All other Recreation and Entertainment occupations	635	751	663	728	728	724	715	705	731	741	772
Travel Services	231	253	266	266	263	262	258	254	255	258	263
Retail Trade Managers (A211)/(NOC0621)	15	17	18	18	18	18	17	17	17	17	18
Travel Counsellors (G711)/(NOC6431)	86	94	99	99	98	98	96	95	95	96	98
All other Travel Services Occupations	129	141	149	149	147	147	144	142	143	144	147
Total Tourism and Related Industries	7,917	8,510	7,608	8,972	8,999	9,068	8,949	9,010	9,249	9,412	9,675

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 air transportation industry and other 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 (223);
- Food and beverage servers (188);
- Cooks (110);
- Bus drivers (89);
- Restaurant and food service managers (57);
- Cashiers (54);
- Light duty cleaners (52);
- Chefs (37);
- Taxi and Limousine Drivers and Chauffeurs (37); and
- Hotel Front Desk Clerks (31).

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, Northern BC, 2011 to 2020

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Air transportation	168	188	356
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	37	39	76
Pursers and Flight Attendants (G712)/(NOC6432)	28	31	59
Airline Sales and Service Agents (G713)/(NOC6433)	35	38	73
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	12	15	27
Air Transport Ramp Attendants (H737)/(NOC7437)	10	12	21
All other Air Transportation Occupations	46	53	99
Rail transportation	4	15	19
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	2	7	9
Railway Conductors and Brakemen/women (H722)/(NOC7362)	2	8	11
Other Transportation	291	363	653
Transportation Managers (A373)/(NOC0713)	6	10	15
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	5	4	9
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	12	13	25
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	89	114	203
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	37	48	85
All other Transportation Occupations (excl. air)	141	174	315
Accommodation	269	329	598
Accommodation Service Managers (A222)/(NOC0632)	19	36	56
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	13	11	24
Chefs (G411)/(NOC6241)	5	5	10
Cooks (G412)/(NOC6242)	8	8	16
Bartenders (G512)/(NOC6452)	3	2	5
Food and Beverage Servers (G513)/(NOC6453)	29	19	48
Hotel Front Desk Clerks (G715)/(NOC6435)	31	46	78
Light Duty Cleaners (G931)/(NOC6661)	52	78	129
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	11	17	29
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	11	9	20
All other occupations in accommodation	86	98	184

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Food & Beverage Services	730	735	1,465
Restaurant & food service manager (A221)/(NOC0631)	57	114	170
Food Service Supervisors (G012)/(NOC6212)	20	31	50
Cashiers (G311)/(NOC6611)	46	40	85
Chefs (G411)/(NOC6241)	32	35	67
Cooks (G412)/(NOC6242)	102	113	215
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	23	16	39
Bartenders (G512)/(NOC6452)	23	16	40
Food and Beverage Servers (G513)/(NOC6453)	159	110	268
Bakers (G942)/(NOC6252)	8	12	19
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	204	179	383
Delivery drivers (H714)/(NOC7414)	6	11	17
All other Food and Beverage occupations	51	59	110
Recreation and Entertainment	263	341	603
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	7	17	24
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	3	6	9
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	30	26	56
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	16	16	32
Cashiers (G311)/(NOC6611)	9	7	16
Security Guards and Related Occupations (G631)/(NOC6651)	4	6	10
Casino Occupations (G723)/(NOC6443)	16	29	45
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	16	22	38
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	5	7	12
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	8	7	15
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	13	12	25
All other Recreation and Entertainment occupations	136	186	322
Travel Services	32	82	115
Retail Trade Managers (A211)/(NOC0621)	2	7	9
Travel Counsellors (G711)/(NOC6431)	12	28	40
All other Travel Services Occupations	18	48	66
Total Tourism and Related Industries	1,757	2,053	3,810

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 (195);
- Food and beverage servers (129);
- Cooks (121);
- Restaurant and food service managers (114);
- Bus drivers (114);
- Light duty cleaners (78);
- Taxi and Limousine Drivers and Chauffeurs (48);
- Cashiers (47);
- Hotel front desk clerks (46); and
- Chefs (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 Northern BC development regions (combining North Coast, Nechako, and Northeast development regions), labour force growth is projected to be at an average rate of 1.2% per year between 2010 and 2020, compared with the projected employment growth rate of 1.3% 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, Northern BC

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	551	661	504	620	619	620	616	633	643	663	675
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	121	145	110	136	136	136	135	138	140	144	146
Pursers and Flight Attendants (G712)/(NOC6432)	93	112	86	105	105	106	105	109	110	114	117
Airline Sales and Service Agents (G713)/(NOC6433)	115	138	105	129	128	128	127	130	132	136	138
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	38	45	35	43	43	43	43	44	45	46	47
Air Transport Ramp Attendants (H737)/(NOC7437)	32	38	29	36	36	37	37	38	38	40	40
All other Air Transportation Occupations	152	183	139	172	171	171	170	175	178	184	187
Rail transportation	28	33	25	31	31	31	31	31	32	33	33
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	13	15	12	14	14	14	14	14	14	15	15
Railway Conductors and Brakemen/women (H722)/(NOC7362)	15	18	14	17	17	17	17	17	17	18	18
Other Transportation	1,060	1,271	970	1,194	1,192	1,193	1,186	1,218	1,238	1,277	1,300
Transportation Managers (A373)/(NOC0713)	21	25	19	23	23	23	23	24	24	25	25
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	19	23	17	22	22	22	22	22	23	23	24
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	46	55	42	52	52	52	51	53	54	56	57
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	323	387	295	362	361	360	357	366	371	382	387
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	136	164	127	158	160	162	163	169	174	182	187
All other Transportation Occupations (excl. air)	516	617	470	577	575	574	570	584	593	610	620
Accommodation	1,239	1,252	1,178	1,399	1,391	1,390	1,359	1,358	1,388	1,399	1,434
Accommodation Service Managers (A222)/(NOC0632)	89	90	85	102	101	101	99	99	102	103	105
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	61	61	58	68	68	68	66	66	67	68	69
Chefs (G411)/(NOC6241)	23	23	22	26	26	26	25	25	26	26	26
Cooks (G412)/(NOC6242)	36	37	35	41	41	41	40	40	40	41	42
Bartenders (G512)/(NOC6452)	15	15	14	16	16	16	16	15	16	16	16
Food and Beverage Servers (G513)/(NOC6453)	134	135	127	151	149	149	145	145	148	149	153
Hotel Front Desk Clerks (G715)/(NOC6435)	145	147	138	163	162	161	157	157	160	161	165
Light Duty Cleaners (G931)/(NOC6661)	235	239	226	270	270	271	266	268	275	279	287
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	53	53	50	59	59	59	57	57	58	58	59
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	50	51	48	57	56	56	55	54	55	56	57
All other occupations in accommodation	396	400	376	446	443	442	432	432	441	444	455

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	3,612	3,639	3,417	4,047	4,014	4,000	3,910	3,907	3,992	4,024	4,122
Restaurant & food service manager (A221)/(NOC0631)	281	284	267	317	315	314	307	306	313	315	322
Food Service Supervisors (G012)/(NOC6212)	98	98	92	109	108	107	105	104	107	107	110
Cashiers (G311)/(NOC6611)	227	229	216	256	255	255	251	252	260	263	272
Chefs (G411)/(NOC6241)	156	158	149	176	175	175	171	171	175	176	180
Cooks (G412)/(NOC6242)	500	505	475	564	560	560	547	547	558	563	576
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	115	116	109	128	127	126	124	124	127	128	131
Bartenders (G512)/(NOC6452)	116	116	109	128	126	125	121	120	122	122	124
Food and Beverage Servers (G513)/(NOC6453)	786	789	739	872	862	857	836	833	849	854	873
Bakers (G942)/(NOC6252)	37	38	35	42	42	42	41	41	42	43	44
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	1,011	1,016	951	1,124	1,111	1,104	1,078	1,075	1,097	1,104	1,129
Delivery drivers (H714)/(NOC7414)	32	32	30	35	35	35	34	34	34	34	35
All other Food and Beverage occupations	252	258	246	295	297	301	297	299	309	314	325
Recreation and Entertainment	1,228	1,497	1,320	1,426	1,400	1,376	1,348	1,316	1,353	1,356	1,400
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	33	40	36	39	38	38	37	36	37	37	38
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	15	19	16	18	17	17	17	16	17	17	17
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	143	173	152	164	161	157	154	150	154	155	160
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	73	89	79	86	84	83	82	80	82	82	85
Cashiers (G311)/(NOC6611)	40	49	43	47	46	45	45	44	45	45	47
Security Guards and Related Occupations (G631)/(NOC6651)	19	23	20	22	22	21	21	20	21	21	21
Casino Occupations (G723)/(NOC6443)	76	93	82	88	87	85	84	82	84	84	87
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	75	91	80	86	85	83	82	80	82	82	85
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	21	26	23	25	24	24	24	23	24	24	25
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	37	46	40	43	43	42	41	40	41	41	43
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	60	73	64	69	67	65	63	61	63	62	64
All other Recreation and Entertainment occupations	636	775	684	739	726	714	700	684	703	705	728
Travel Services	232	254	268	269	268	267	264	263	266	271	279
Retail Trade Managers (A211)/(NOC0621)	16	17	18	18	18	18	18	18	18	19	19
Travel Counsellors (G711)/(NOC6431)	87	95	100	100	100	99	98	98	99	101	104
All other Travel Services Occupations	130	142	150	151	150	149	148	147	149	151	156
Total Tourism and Related Industries	7,950	8,607	7,682	8,986	8,915	8,876	8,715	8,727	8,912	9,023	9,243

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, Northern BC

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	-4	4	4	8	14	18	20	22	25	31	41
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	0	2	2	3	4	5	5	6	7	9	11
Pursers and Flight Attendants (G712)/(NOC6432)	-1	0	0	0	1	2	2	2	2	3	4
Airline Sales and Service Agents (G713)/(NOC6433)	-1	1	2	3	5	6	6	7	8	10	12
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	5	5	6	6	8	11
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	1	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	-8	-2	8	20	32	35	40	45	51	55
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	1	1	1	1
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	0	0	0	0	1	1	1	1	1	1	2
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	1	-2	0	4	9	13	15	18	20	24	26
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	0	-3	-3	-5	-5	-6	-7	-9	-10	-12	-14
All other Transportation Occupations (excl. air)	2	-2	1	8	15	22	24	28	32	36	40
Accommodation	-7	-12	-10	-3	15	33	40	47	54	60	67
Accommodation Service Managers (A222)/(NOC0632)	-1	-1	-1	-1	0	1	1	1	2	2	2
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	-1	-1	0	0	1	2	2	3	3	4	4
Chefs (G411)/(NOC6241)	0	0	0	0	1	1	1	1	1	2	2
Cooks (G412)/(NOC6242)	0	0	0	0	1	1	2	2	2	2	3
Bartenders (G512)/(NOC6452)	0	0	0	0	1	1	1	1	1	2	2
Food and Beverage Servers (G513)/(NOC6453)	-1	-1	-1	0	3	5	6	7	8	9	10
Hotel Front Desk Clerks (G715)/(NOC6435)	-1	-1	-1	1	3	6	7	8	9	10	11
Light Duty Cleaners (G931)/(NOC6661)	0	-2	-3	-3	-1	1	1	1	1	1	0
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	-1	0	0	1	2	2	3	4	4	5
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	0	0	0	0	1	2	2	3	3	4	4
All other occupations in accommodation	-3	-4	-3	-1	5	12	14	17	19	22	24

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	-25	-36	-26	-6	31	89	113	138	164	183	195
Restaurant & food service manager (A221)/(NOC0631)	-3	-4	-4	-3	-1	3	5	8	10	12	13
Food Service Supervisors (G012)/(NOC6212)	-1	-1	0	0	2	3	4	5	6	6	7
Cashiers (G311)/(NOC6611)	-2	-3	-3	-3	-2	1	1	1	1	0	-1
Chefs (G411)/(NOC6241)	0	-1	-1	0	1	3	4	5	7	7	8
Cooks (G412)/(NOC6242)	0	-3	-3	-1	3	10	14	17	21	24	25
Maîtres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	-1	-1	0	1	2	4	5	5	6	6	7
Bartenders (G512)/(NOC6452)	-1	-1	0	2	4	6	8	10	12	13	15
Food and Beverage Servers (G513)/(NOC6453)	-6	-6	-1	6	17	32	39	46	54	60	65
Bakers (G942)/(NOC6252)	0	-1	-1	0	0	0	0	1	1	1	1
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-8	-8	-3	7	20	39	47	56	65	72	78
Delivery drivers (H714)/(NOC7414)	0	0	0	0	0	1	1	2	2	2	3
All other Food and Beverage occupations	-3	-7	-10	-14	-16	-16	-17	-18	-20	-22	-25
Recreation and Entertainment	0	-45	-39	-20	6	24	33	45	60	75	90
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	-1	-1	0	0	0	0	1	1	1	1
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	0	-5	-4	-1	2	5	6	7	9	11	13
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	-3	-3	-2	-1	0	0	1	2	3	3
Cashiers (G311)/(NOC6611)	0	-2	-2	-1	0	0	0	1	1	1	2
Security Guards and Related Occupations (G631)/(NOC6651)	0	-1	0	0	0	1	1	1	1	2	2
Casino Occupations (G723)/(NOC6443)	0	-3	-3	-1	0	1	2	2	3	4	5
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	1	-2	-2	0	1	2	3	3	4	5	6
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	-1	-1	-1	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	3
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	0	-2	-1	0	2	3	4	5	7	8	9
All other Recreation and Entertainment occupations	0	-24	-21	-11	2	10	15	21	28	36	44
Travel Services	-1	-1	-2	-3	-4	-5	-7	-9	-11	-13	-16
Retail Trade Managers (A211)/(NOC0621)	0	0	0	0	-1	-1	-1	-1	-1	-1	-2
Travel Counsellors (G711)/(NOC6431)	0	0	-1	-1	-1	-1	-2	-3	-4	-4	-5
All other Travel Services Occupations	0	0	-1	-2	-2	-3	-4	-5	-6	-7	-9
Total Tourism and Related Industries	-33	-96	-74	-14	84	192	235	283	337	388	432

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 Northern BC 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 Northern BC region is projected to grow at an average compound rate of 2.0% per year between 2010 and 2020, which is faster than the labour demand growth in the tourism and hospitality sector in BC over the same period (1.6% per year). In fact, this region is projected to experience the fastest employment growth rate in the tourism and hospitality sector within the province.

Within the sector in the region, employment in the air transportation industry and in other transportation industry is expected to grow faster than the average rate of the entire sector, while employment in rail transportation and in the travel services industry is expected to experience much slower growth. In total, about 1,750 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 2,100 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 55% 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 Northern BC region tourism and hospitality sector is younger than their provincial counterparts. However, the positive outlook in the tourism and hospitality sector in the region is closely tied to the strong economic outlook in the region related to the resource sector, and therefore even though the average age of workers may be younger, and the attrition needs lower, the recruitment and retention challenges may be even bigger due to higher wages offered in resource related industries.

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, Northern BC and the Province

Industry/Occupation	Northern BC			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Air transportation	170	180	2.7%	2,360	4,100	1.8%
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	40	40		520	960	
Pursers and Flight Attendants (G712)/(NOC6432)	30	30		400	670	
Airline Sales and Service Agents (G713)/(NOC6433)	40	40		490	830	
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	10	10		150	290	
Air Transport Ramp Attendants (H737)/(NOC7437)	10	10		130	220	
All other Air Transportation Occupations	50	50		660	1,130	
Rail transportation	0	20	1.5%	30	230	0.6%
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	0	10		10	100	
Railway Conductors and Brakemen/women (H722)/(NOC7362)	0	10		20	130	
Other Transportation	290	350	2.4%	3,850	7,260	1.6%
Transportation Managers (A373)/(NOC0713)	10	10		80	200	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	10	0		70	80	
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	10	10		150	270	
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	90	110		1,180	2,290	
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	40	50		510	990	
All other Transportation Occupations (excl. air)	140	170		1,840	3,430	
Accommodation	270	350	2.0%	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)	10	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	50		840	1,650	
Light Duty Cleaners (G931)/(NOC6661)	50	80		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	90	100		2,300	3,160	

Industry/Occupation	Northern BC			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Food & Beverage Services	730	740	1.9%	25,250	24,720	1.7%
Restaurant & food service manager (A221)/(NOC0631)	60	110		1,980	3,780	
Food Service Supervisors (G012)/(NOC6212)	20	30		680	890	
Cashiers (G311)/(NOC6611)	50	40		1,580	1,520	
Chefs (G411)/(NOC6241)	30	40		1,350	1,340	
Cooks (G412)/(NOC6242)	100	110		3,530	4,070	
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	20	20		790	550	
Bartenders (G512)/(NOC6452)	20	20		770	540	
Food and Beverage Servers (G513)/(NOC6453)	160	110		5,390	3,690	
Bakers (G942)/(NOC6252)	10	10		270	370	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	200	180		6,960	5,570	
Delivery drivers (H714)/(NOC7414)	10	10		220	390	
All other Food and Beverage occupations	50	60		1,740	2,010	
Recreation and Entertainment	260	370	2.0%	6,420	10,990	1.3%
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	10	20		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)	30	30		740	850	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	20	20		430	610	
Cashiers (G311)/(NOC6611)	10	10		210	250	
Security Guards and Related Occupations (G631)/(NOC6651)	0	10		80	240	
Casino Occupations (G723)/(NOC6443)	20	30		520	1,040	
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	20	20		390	580	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	10		100	280	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	10	10		200	200	
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	10	10		300	540	
All other Recreation and Entertainment occupations	140	190		3,220	5,780	
Travel Services	30	90	1.3%	1,240	3,450	1.2%
Retail Trade Managers (A211)/(NOC0621)	0	10		80	250	
Travel Counsellors (G711)/(NOC6431)	10	30		450	1,240	
All other Travel Services Occupations	20	50		700	1,960	
Total Tourism and Related Industries	1,750	2,100	2.0%	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 will account for 15% of all shortages in that year in the tourism and hospitality sector, while shortage in the food and beverage services industry accounts for 45% 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 in 2014 (or equivalent to 80 full-year jobs), gradually increasing to almost 5% of labour supply by 2020 (or equivalent to 430 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 2,100 full-year job openings for replacement needs, or about 210 openings to fill per year. This is in addition to a total of 1,800 full-year jobs (or about 180 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