

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

Final Report

**Vancouver, Coast and Mountains
Tourism Region**

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The views expressed in this paper are those of the author.
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Table of Contents

Table of Contents	ii
1. Introduction	1
2. Methodology	3
2.1. Defining Total Tourism and Hospitality Related Employment	3
2.2. Quantitative Approach	5
2.2.1. Defining Labour Demand, Labour Supply, and Potential Imbalances	5
2.2.2. Labour Demand Projections by Industry and by Occupation	6
2.2.3. Labour Supply Projections by Industry and by Occupation	7
2.2.4. Update to 2011 BC Labour Market Outlook	8
2.3. Qualitative Approach	9
3. Region 3 – Vancouver, Coast and Mountains	10
3.1. Regional Tourism Priorities	10
3.2. Labour Demand Projections by Industry and by Occupation	11
3.2.1. Regional Employment Growth in the Recent Past	11
3.2.2. Regional Employment Projections	13
3.2.3. Replacement Needs	17
3.3. Labour Supply Projections by Industry and by Occupation	20
3.4. Supply and Demand Imbalances	23
3.5. Summary of Findings	26
References	31
Appendix I List of Industry Included in Total Tourism and Hospitality Employment Conforming to HRM	32
Appendix II List of Occupations within Each Tourism and Hospitality Industry Conforming to HRM	35
Appendix III Concordance between Industry Groupings in BC Labour Market Scenario Model and NAICS	37
Appendix IV List of Stakeholders Interviewed	38



1. Introduction

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

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

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

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

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

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

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

2. Methodology

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

2.1. Defining Total Tourism and Hospitality Related Employment

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

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

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

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

¹ World Tourism Organization.

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

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

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

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

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

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

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

2.2. Quantitative Approach

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

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

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

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

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

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

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

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

2.2.2. Labour Demand Projections by Industry and by Occupation

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

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

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

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

2.2.3. Labour Supply Projections by Industry and by Occupation

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

Following the steps above, details are described below:

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

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

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

2.2.4. Update to 2011 BC Labour Market Outlook

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

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

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

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

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

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

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

2.3. Qualitative Approach

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

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

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

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

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

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

3. Vancouver, Coast and Mountains

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

3.1. Regional Tourism Priorities

The Vancouver, Coast and Mountains (VCM) tourism region is situated in the southwest corner of BC. The nature of the region presents mountains, oceans, lakes, rivers and beaches and provides the perfect venue for a vast array of outdoor adventures, such as biking, hiking, camping, kayaking, golfing, fishing, skiing and snowboarding. The City of Vancouver, and surrounding metropolitan area including the North Shore mountains are all part of the VCM region. The eastern part of the region contains the Fraser Valley, which offers outdoor activities as well as a growing range of agri-tourism attractions and activities (farm-fresh produce; culinary attractions and refined local wineries). The Sunshine Coast encompasses quaint ocean-side villages with artisan shops, restaurants, farmers markets and beautiful scenery. The northern part of VCM boasts the all-season resort and destination community of Whistler and other world-class outdoor recreation opportunities in the Squamish to Lillooet corridor. As a whole, the VCM region offers a tourism experience balanced by both the great outdoors and many cosmopolitan activities such as fine dining, high-end shopping, museums, art galleries, spas and conferences/meetings and events.

There is also significant new tourism product development taking place throughout the region. Highlights include Surrey, the fastest growing part of the Metro Vancouver region, which is working hard at developing conference/meeting and events business supported by the construction of new accommodations. Richmond is anticipating similar opportunities in the conference/meeting sector along with a possible future hotel development. The Vancouver Airport Authority recently announced plans for a luxury outlet mall near the airport, along the Canada Line. Vancouver also has at least one major hotel expected to open in the next few years. Special events and festivals are valuable as a way to draw local and regional visitors. Sports tourism, such as the 2012 BC Summer Games held in Surrey, has also been identified as a priority product to generate visitor activity.

In VCM's outdoor environment, there are projects underway to develop biking,

hiking and interpretive trails as well as camping, ziplining and other activities in Maple Ridge, Pitt Meadows, Mission and the Hemlock Mountain ski area. The “Experience the Fraser” project is a unique vision that is intended to eventually connect communities, parks, natural features, historic and cultural sites and experiences from the Lower Fraser River to Hope by means of over 550 kilometres of trail (43% of which is already in place) and via the river itself.

In the Whistler and Sea-to-Sky corridor, Whistler/Blackcomb is planning an \$18 million capital expansion for 2013/14. This will enhance skiers’ visitor experience while Whistler strives to regain visitor volumes which were eroded during the recent global recession and due to the stronger Canadian dollar. The Sunshine Coast area of VCM also continues to improve and expand its tourism product, capitalizing on the natural setting and offering an ever-wider range of quality outdoor activities and accommodations.

In recent years VCM has experienced and further anticipates low to moderate growth of visitation and tourism revenues around 1% or less per annum. Interestingly, one of the fast growing segments taking in all that VCM has to offer is that of motorcycle touring. Auto and RV touring have been always been a mainstay market. Recent trends suggest strong growth in the family market and VCM can count on this segment because of the large close-in BC resident base.

From a human resource perspective, for the most part VCM remains an employers’ market which can be satisfied by the local/regional supply of workers. The main exception to this is Whistler which brings in a significant part of its workforce from other parts of Canada and overseas. Otherwise, the retention issues around seasonality do apply in VCM but to a lesser extent than in most other parts of BC.

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 Mainland/Southwest development region has been more positive than the provincial average. The transportation and warehousing industry, the finance, insurance, real estate and leasing industry, and the information, culture and recreation industry have experienced much stronger employment growth than the provincial average in the same industries (5.9% compared with 4.3%, 2.2% compared with no change in employment, 5.0% compared with 3.6%). However, employment in the business, building and other support services industry, and the accommodation and food services industry has experienced growth slower than the provincial averages in the same industries.

Figure 1: Employment in Tourism and Hospitality Related Industries, Mainland / Southwest Development Region and BC

Employment ('000s)	BC			Annual Growth Rate 2010-12	Mainland/Southwest			Annual Growth Rate 2010-12
	2010	2011	2012		2010	2011	2012	
All Industries	2,256.5	2,274.7	2,312.5	1.2%	1,388.4	1,419.1	1,447.4	2.1%
Goods-Producing Sector	442.7	447.4	459.1	1.8%	242.4	260.3	268.8	5.3%
Agriculture	31.8	26.1	26.0	-9.6%	15.0	12.9	13.3	-5.8%
Forestry, Fishing, Mining, Oil and Gas	40.6	40.1	46.1	6.6%	7.6	10.9	9.0	8.8%
Utilities	14.0	12.8	14.9	3.2%	9.5	7.8	10.6	5.6%
Construction	190.5	204.6	192.9	0.6%	108.2	125.7	115.6	3.4%
Manufacturing	165.8	163.9	179.2	4.0%	102.1	103.0	120.2	8.5%
Services-Producing Sector	1,813.8	1,827.2	1,853.4	1.1%	1,146.1	1,158.8	1,178.6	1.4%
Trade	370.1	355.0	356.6	-1.8%	226.3	221.5	220.4	-1.3%
Transportation and Warehousing	118.6	124.1	128.9	4.3%	79.2	82.2	88.9	5.9%
Finance, Insurance, Real Estate and Leasing	141.8	139.4	141.8	0.0%	97.3	100.8	101.7	2.2%
Professional, Scientific and Technical Services	174.3	182.1	173.0	-0.4%	121.6	128.4	118.9	-1.1%
Business, Building and Other Support Services	91.0	94.2	97.6	3.6%	61.7	61.0	64.0	1.8%
Educational Services	167.3	167.1	177.3	2.9%	109.5	110.0	114.0	2.0%
Health Care and Social Assistance	264.2	261.3	274.5	1.9%	149.6	147.1	155.2	1.9%
Information, culture and recreation	108.1	109.4	116.0	3.6%	74.1	75.3	81.7	5.0%
Accommodation and food services	162.3	181.8	171.6	2.8%	100.4	110.7	104.9	2.2%
Other services	104.7	103.9	113.9	4.3%	65.6	62.0	72.3	5.0%
Public administration	111.4	108.9	102.4	-4.1%	60.8	59.9	56.6	-3.5%

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 Mainland/Southwest development region, employment for all industries is projected to grow at an average rate of 1.5% per year between 2010 and 2020, faster than the projected provincial average of 1.2% per year. Of the five broad tourism and hospitality related industry groups, professional, scientific, and managerial services industry is projected to grow the fastest. All five industry

groups are projected to grow faster 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, Mainland/Southwest Development Region and BC

	Projected Annual Growth Rate 2010-2020	
	<u>BC</u>	<u>Mainland/Southwest</u>
All Industries Total	1.2%	1.5%
Transportation & Warehousing	1.4%	1.5%
Finance, Insurance & Real Estate	0.8%	1.4%
Professional, Scientific & Managerial	1.8%	2.0%
Other Services	1.6%	1.7%
Accommodation & Food Services	1.7%	1.8%

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, Mainland / Southwest

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	7,879	8,032	8,523	8,427	8,680	8,904	9,052	9,172	9,287	9,425	9,615
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	1,713	1,747	1,854	1,834	1,890	1,939	1,971	1,997	2,023	2,053	2,095
Pursers and Flight Attendants (G712)/(NOC6432)	1,319	1,344	1,426	1,410	1,452	1,490	1,514	1,535	1,554	1,577	1,609
Airline Sales and Service Agents (G713)/(NOC6433)	1,644	1,676	1,779	1,759	1,812	1,858	1,889	1,914	1,938	1,967	2,007
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	554	565	600	593	611	626	637	645	653	663	676
Air Transport Ramp Attendants (H737)/(NOC7437)	463	472	501	495	510	523	531	538	545	553	564
All other Air Transportation Occupations	2,185	2,227	2,363	2,337	2,406	2,468	2,509	2,542	2,574	2,612	2,665
Rail transportation	414	416	437	432	443	453	454	453	451	449	446
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	188	189	198	196	201	206	206	205	205	204	202
Railway Conductors and Brakemen/women (H722)/(NOC7362)	226	227	239	236	242	247	248	247	246	245	243
Other Transportation	15,324	15,276	16,229	16,115	16,615	17,095	17,367	17,614	17,825	18,032	18,204
Transportation Managers (A373)/(NOC0713)	326	325	345	343	354	364	370	375	380	384	388
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	274	273	290	288	297	305	310	314	318	322	325
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	650	648	688	684	705	725	737	747	756	765	773
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	4,685	4,671	4,962	4,928	5,081	5,228	5,311	5,387	5,452	5,515	5,568
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	2,048	2,042	2,170	2,155	2,222	2,287	2,324	2,357	2,385	2,413	2,437
All other Transportation Occupations (excl. air)	7,342	7,318	7,774	7,718	7,957	8,185	8,315	8,433	8,534	8,632	8,714
Accommodation	21,191	21,012	21,381	21,685	22,386	23,132	23,685	24,116	24,485	24,781	25,080
Accommodation Service Managers (A222)/(NOC0632)	1,534	1,518	1,542	1,561	1,608	1,659	1,695	1,721	1,743	1,760	1,776
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	1,031	1,021	1,037	1,049	1,081	1,116	1,140	1,158	1,172	1,184	1,195
Chefs (G411)/(NOC6241)	425	425	435	444	461	480	494	506	518	527	537
Cooks (G412)/(NOC6242)	623	617	626	634	654	674	689	700	709	715	722
Bartenders (G512)/(NOC6452)	242	240	243	246	254	262	267	271	275	277	280
Food and Beverage Servers (G513)/(NOC6453)	2,271	2,248	2,283	2,311	2,382	2,458	2,510	2,550	2,583	2,607	2,632
Hotel Front Desk Clerks (G715)/(NOC6435)	2,456	2,430	2,469	2,499	2,575	2,657	2,714	2,757	2,792	2,819	2,845
Light Duty Cleaners (G931)/(NOC6661)	4,118	4,111	4,211	4,298	4,464	4,640	4,792	4,922	5,040	5,146	5,254
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	912	903	917	929	957	988	1,009	1,025	1,038	1,048	1,058
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	856	847	860	871	897	926	946	960	973	982	991
All other occupations in accommodation	6,723	6,654	6,758	6,842	7,051	7,274	7,430	7,547	7,643	7,716	7,789

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	90,428	89,773	91,536	92,790	95,425	98,691	101,339	103,509	105,384	106,895	108,145
Restaurant & food service manager (A221)/(NOC0631)	7,169	7,114	7,252	7,348	7,554	7,810	8,018	8,189	8,335	8,453	8,551
Food Service Supervisors (G012)/(NOC6212)	2,419	2,401	2,447	2,480	2,550	2,636	2,706	2,764	2,814	2,853	2,886
Cashiers (G311)/(NOC6611)	5,743	5,700	5,811	5,889	6,054	6,260	6,427	6,564	6,682	6,777	6,855
Chefs (G411)/(NOC6241)	4,142	4,136	4,241	4,322	4,469	4,644	4,780	4,895	4,995	5,080	5,154
Cooks (G412)/(NOC6242)	12,715	12,620	12,866	13,040	13,408	13,866	14,238	14,542	14,805	15,017	15,191
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	2,863	2,841	2,896	2,935	3,018	3,121	3,204	3,273	3,332	3,379	3,418
Bartenders (G512)/(NOC6452)	2,821	2,800	2,854	2,892	2,973	3,074	3,156	3,223	3,281	3,327	3,366
Food and Beverage Servers (G513)/(NOC6453)	19,393	19,247	19,620	19,883	20,443	21,137	21,702	22,164	22,562	22,883	23,147
Bakers (G942)/(NOC6252)	948	941	959	972	1,000	1,034	1,061	1,084	1,103	1,119	1,132
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	25,096	24,907	25,389	25,730	26,453	27,352	28,082	28,680	29,196	29,610	29,952
Delivery drivers (H714)/(NOC7414)	787	782	797	807	830	858	881	900	916	929	940
All other Food and Beverage occupations	6,331	6,283	6,405	6,490	6,672	6,899	7,082	7,233	7,363	7,467	7,553
Recreation and Entertainment	30,092	28,887	30,350	30,218	31,327	32,312	33,090	33,710	34,156	34,582	34,965
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	799	767	806	802	832	858	879	895	907	918	929
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	373	358	376	374	388	400	410	418	423	429	433
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	3,452	3,314	3,481	3,466	3,593	3,706	3,795	3,866	3,917	3,966	4,010
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	1,956	1,878	1,973	1,965	2,037	2,102	2,152	2,193	2,222	2,250	2,275
Cashiers (G311)/(NOC6611)	973	934	981	977	1,012	1,044	1,069	1,089	1,104	1,118	1,130
Security Guards and Related Occupations (G631)/(NOC6651)	455	436	458	456	473	488	500	509	516	522	528
Casino Occupations (G723)/(NOC6443)	2,748	2,638	2,772	2,760	2,861	2,951	3,022	3,079	3,120	3,159	3,194
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	1,799	1,727	1,814	1,806	1,872	1,930	1,977	2,014	2,040	2,065	2,088
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	517	497	522	519	538	555	569	579	587	594	601
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	915	878	923	919	952	982	1,006	1,025	1,038	1,051	1,063
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	1,439	1,381	1,451	1,445	1,498	1,545	1,582	1,611	1,633	1,653	1,671
All other Recreation and Entertainment occupations	14,667	14,080	14,793	14,729	15,270	15,750	16,129	16,431	16,649	16,857	17,044
Travel Services	7,050	7,150	7,160	7,401	7,566	7,762	7,870	7,953	8,011	8,073	8,100
Retail Trade Managers (A211)/(NOC0621)	467	474	474	490	501	514	521	527	531	535	537
Travel Counsellors (G711)/(NOC6431)	2,627	2,665	2,668	2,758	2,820	2,893	2,933	2,964	2,985	3,008	3,018
All other Travel Services Occupations	3,956	4,012	4,017	4,153	4,246	4,356	4,416	4,463	4,495	4,530	4,545
Total Tourism and Related Industries	172,378	170,547	175,616	177,069	182,442	188,349	192,858	196,526	199,599	202,237	204,555

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 are projected to grow the fastest. On the other hand, 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 (5,140);
- Food and beverage servers (4,115);
- Cooks (2,575);
- Restaurant and food service managers (1,382);
- Cashiers (1,269);
- Light duty cleaners (1,136);
- Chefs (1,125);
- Bus drivers (883);
- Bartenders (582); and
- Program Leaders and Instructors in Recreation and Sport (558).

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, Mainland/Southwest, 2011 to 2020

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Air transportation	1,737	2,694	4,431
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	382	627	1,008
Pursers and Flight Attendants (G712)/(NOC6432)	290	447	737
Airline Sales and Service Agents (G713)/(NOC6433)	362	558	920
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	122	189	311
Air Transport Ramp Attendants (H737)/(NOC7437)	101	138	239
All other Air Transportation Occupations	479	735	1,215
Rail transportation	32	148	181
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	15	67	82
Railway Conductors and Brakemen/women (H722)/(NOC7362)	17	81	99
Other Transportation	2,879	4,691	7,570
Transportation Managers (A373)/(NOC0713)	62	127	189
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	51	56	107
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	123	188	311
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	883	1,463	2,346
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	388	640	1,028
All other Transportation Occupations (excl. air)	1,372	2,216	3,589
Accommodation	3,889	5,517	9,406
Accommodation Service Managers (A222)/(NOC0632)	243	491	734
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	164	160	324
Chefs (G411)/(NOC6241)	112	95	207
Cooks (G412)/(NOC6242)	99	133	232
Bartenders (G512)/(NOC6452)	38	30	68
Food and Beverage Servers (G513)/(NOC6453)	361	285	646
Hotel Front Desk Clerks (G715)/(NOC6435)	390	797	1,186
Light Duty Cleaners (G931)/(NOC6661)	1,136	1,503	2,639
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	145	317	462
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	136	137	273
All other occupations in accommodation	1,067	1,568	2,635

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Food & Beverage Services	17,717	16,600	34,317
Restaurant & food service manager (A221)/(NOC0631)	1,382	2,330	3,712
Food Service Supervisors (G012)/(NOC6212)	467	553	1,021
Cashiers (G311)/(NOC6611)	1,112	970	2,082
Chefs (G411)/(NOC6241)	1,012	923	1,935
Cooks (G412)/(NOC6242)	2,476	2,756	5,232
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	556	365	921
Bartenders (G512)/(NOC6452)	544	360	904
Food and Beverage Servers (G513)/(NOC6453)	3,754	2,475	6,229
Bakers (G942)/(NOC6252)	184	245	429
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	4,856	4,075	8,931
Delivery drivers (H714)/(NOC7414)	152	242	394
All other Food and Beverage occupations	1,222	1,305	2,527
Recreation and Entertainment	4,874	7,120	11,993
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	130	280	410
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	60	112	172
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	558	533	1,091
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	320	389	709
Cashiers (G311)/(NOC6611)	157	161	318
Security Guards and Related Occupations (G631)/(NOC6651)	73	138	211
Casino Occupations (G723)/(NOC6443)	445	799	1,244
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	289	365	654
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	84	179	262
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	148	146	294
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	232	375	607
All other Recreation and Entertainment occupations	2,377	3,643	6,020
Travel Services	1,049	2,366	3,416
Retail Trade Managers (A211)/(NOC0621)	69	164	233
Travel Counsellors (G711)/(NOC6431)	391	861	1,252
All other Travel Services Occupations	589	1,341	1,931
Total Tourism and Related Industries	32,177	39,137	71,314

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 (4,357);
- Cooks (2,889);
- Food and beverage servers (2,760);
- Restaurant and food service managers (2,330);
- Light duty cleaners (1,503);
- Bus drivers (1,463);
- Cashiers (1,131);
- Chefs (1,018)
- Casino occupations (799); and
- Hotel front desk clerks (797).

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 Mainland/Southwest development region, labour force growth is projected to be at an average rate of 1.3% per year between 2010 and 2020, compared with the projected employment growth rate of 1.5% 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, Mainland / Southwest

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	7,934	7,985	8,450	8,317	8,488	8,653	8,768	8,860	8,934	9,002	9,068
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	1,732	1,732	1,821	1,781	1,806	1,829	1,840	1,847	1,850	1,851	1,852
Pursers and Flight Attendants (G712)/(NOC6432)	1,344	1,357	1,441	1,423	1,457	1,490	1,514	1,535	1,552	1,568	1,584
Airline Sales and Service Agents (G713)/(NOC6433)	1,650	1,662	1,759	1,731	1,767	1,802	1,828	1,850	1,869	1,886	1,902
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	544	549	582	575	588	601	610	618	624	630	636
Air Transport Ramp Attendants (H737)/(NOC7437)	459	465	496	492	505	519	529	538	546	553	561
All other Air Transportation Occupations	2,205	2,221	2,351	2,316	2,365	2,413	2,446	2,473	2,494	2,514	2,533
Rail transportation	401	403	426	419	427	435	438	440	442	442	443
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	184	185	195	192	195	199	200	201	202	202	202
Railway Conductors and Brakemen/women (H722)/(NOC7362)	217	218	231	227	232	236	238	239	240	240	241
Other Transportation	15,271	15,369	16,263	16,007	16,335	16,653	16,876	17,056	17,201	17,335	17,464
Transportation Managers (A373)/(NOC0713)	295	297	313	308	314	319	323	326	328	330	332
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	276	278	295	291	297	303	308	312	315	318	322
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	658	661	698	686	699	711	719	725	730	734	738
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	4,593	4,602	4,848	4,750	4,825	4,896	4,941	4,974	4,996	5,015	5,031
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	2,064	2,120	2,289	2,299	2,393	2,489	2,560	2,626	2,687	2,748	2,809
All other Transportation Occupations (excl. air)	7,384	7,411	7,820	7,674	7,807	7,935	8,025	8,093	8,144	8,190	8,232
Accommodation	21,317	21,207	21,571	21,734	22,152	22,594	23,009	23,316	23,567	23,763	23,964
Accommodation Service Managers (A222)/(NOC0632)	1,559	1,560	1,595	1,616	1,656	1,698	1,736	1,766	1,792	1,814	1,837
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	1,036	1,027	1,042	1,046	1,063	1,081	1,097	1,109	1,117	1,123	1,130
Chefs (G411)/(NOC6241)	416	414	422	426	435	444	452	458	463	467	472
Cooks (G412)/(NOC6242)	629	627	639	644	658	672	684	693	701	707	713
Bartenders (G512)/(NOC6452)	243	238	239	237	238	239	240	240	239	238	237
Food and Beverage Servers (G513)/(NOC6453)	2,285	2,262	2,290	2,296	2,329	2,364	2,401	2,426	2,446	2,459	2,473
Hotel Front Desk Clerks (G715)/(NOC6435)	2,468	2,444	2,475	2,482	2,518	2,556	2,593	2,616	2,634	2,644	2,656
Light Duty Cleaners (G931)/(NOC6661)	4,161	4,178	4,290	4,363	4,488	4,620	4,740	4,840	4,928	5,006	5,086
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	907	900	914	919	935	952	969	981	991	999	1,007
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	862	856	869	874	889	905	921	932	941	948	955
All other occupations in accommodation	6,752	6,700	6,797	6,831	6,944	7,063	7,176	7,253	7,313	7,355	7,399

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	91,060	90,675	92,230	92,917	94,684	96,542	98,499	99,988	101,235	102,238	103,263
Restaurant & food service manager (A221)/(NOC0631)	7,318	7,295	7,428	7,491	7,641	7,798	7,952	8,069	8,165	8,242	8,320
Food Service Supervisors (G012)/(NOC6212)	2,445	2,428	2,463	2,475	2,515	2,557	2,604	2,638	2,665	2,686	2,707
Cashiers (G311)/(NOC6611)	5,760	5,756	5,875	5,939	6,072	6,212	6,380	6,519	6,644	6,754	6,866
Chefs (G411)/(NOC6241)	4,139	4,143	4,235	4,288	4,391	4,499	4,607	4,693	4,768	4,832	4,897
Cooks (G412)/(NOC6242)	12,740	12,750	13,034	13,197	13,514	13,847	14,177	14,442	14,674	14,871	15,071
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	2,880	2,852	2,885	2,890	2,928	2,968	3,016	3,049	3,073	3,091	3,108
Bartenders (G512)/(NOC6452)	2,834	2,788	2,802	2,789	2,808	2,829	2,848	2,854	2,852	2,842	2,833
Food and Beverage Servers (G513)/(NOC6453)	19,530	19,327	19,535	19,556	19,802	20,061	20,346	20,531	20,662	20,742	20,823
Bakers (G942)/(NOC6252)	964	966	989	1,003	1,029	1,056	1,082	1,103	1,121	1,136	1,152
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	25,295	25,113	25,467	25,578	25,984	26,410	26,923	27,306	27,621	27,869	28,121
Delivery drivers (H714)/(NOC7414)	801	800	816	824	841	859	878	892	903	913	923
All other Food and Beverage occupations	6,353	6,456	6,701	6,887	7,160	7,446	7,686	7,894	8,086	8,261	8,441
Recreation and Entertainment	30,102	29,786	31,280	30,641	31,188	31,768	32,296	32,606	32,716	32,771	32,848
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	822	817	863	849	869	889	906	917	923	927	931
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	374	370	389	381	388	396	402	406	408	409	410
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	3,466	3,413	3,567	3,476	3,521	3,569	3,618	3,643	3,645	3,641	3,639
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	1,793	1,777	1,869	1,834	1,869	1,907	1,941	1,963	1,972	1,978	1,986
Cashiers (G311)/(NOC6611)	987	980	1,032	1,014	1,035	1,057	1,079	1,094	1,102	1,108	1,115
Security Guards and Related Occupations (G631)/(NOC6651)	469	463	486	475	483	491	498	502	502	501	501
Casino Occupations (G723)/(NOC6443)	2,754	2,727	2,866	2,809	2,861	2,916	2,965	2,994	3,005	3,011	3,019
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	1,849	1,834	1,930	1,895	1,933	1,974	2,012	2,037	2,050	2,059	2,070
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	525	522	551	542	554	567	579	586	590	593	597
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	917	908	954	935	952	971	987	997	1,000	1,002	1,005
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	1,447	1,421	1,481	1,440	1,455	1,471	1,485	1,488	1,483	1,475	1,467
All other Recreation and Entertainment occupations	14,698	14,553	15,293	14,990	15,267	15,561	15,823	15,979	16,037	16,067	16,109
Travel Services	7,081	7,168	7,211	7,491	7,693	7,910	8,083	8,232	8,361	8,474	8,589
Retail Trade Managers (A211)/(NOC0621)	468	476	481	502	518	535	549	561	572	582	592
Travel Counsellors (G711)/(NOC6431)	2,643	2,675	2,691	2,796	2,871	2,952	3,018	3,076	3,126	3,170	3,215
All other Travel Services Occupations	3,971	4,017	4,039	4,193	4,304	4,422	4,516	4,595	4,663	4,723	4,783
Total Tourism and Related Industries	173,167	172,593	177,432	177,526	180,967	184,555	187,968	190,499	192,456	194,026	195,639

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, Mainland /Southwest

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	-55	46	73	110	193	251	284	312	352	423	548
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	-19	15	33	53	84	110	131	150	173	202	243
Pursers and Flight Attendants (G712)/(NOC6432)	-25	-13	-14	-13	-4	0	0	0	2	9	25
Airline Sales and Service Agents (G713)/(NOC6433)	-6	15	20	27	45	57	61	64	69	81	105
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	10	16	17	18	23	26	27	28	29	33	41
Air Transport Ramp Attendants (H737)/(NOC7437)	4	6	4	3	4	4	2	0	-1	0	3
All other Air Transportation Occupations	-19	7	12	20	41	55	63	70	80	98	132
Rail transportation	13	13	11	13	16	18	16	12	9	7	3
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	4	4	3	4	6	7	6	4	3	2	0
Railway Conductors and Brakemen/women (H722)/(NOC7362)	9	9	8	9	10	11	10	8	7	5	3
Other Transportation	53	-93	-34	108	280	441	491	557	624	697	740
Transportation Managers (A373)/(NOC0713)	30	28	32	35	40	45	47	49	52	54	56
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	-2	-5	-5	-3	0	2	2	3	3	3	3
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	-8	-13	-10	-3	6	14	18	22	26	31	35
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	92	68	114	178	256	332	370	413	456	500	537
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	-16	-78	-119	-144	-171	-202	-236	-269	-302	-335	-373
All other Transportation Occupations (excl. air)	-43	-93	-46	44	149	250	290	340	389	442	482
Accommodation	-127	-195	-190	-49	234	538	676	800	918	1,018	1,116
Accommodation Service Managers (A222)/(NOC0632)	-25	-42	-53	-55	-48	-39	-42	-45	-49	-54	-60
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	-5	-7	-5	3	19	35	42	49	55	60	65
Chefs (G411)/(NOC6241)	9	10	13	18	27	36	42	48	54	60	66
Cooks (G412)/(NOC6242)	-6	-10	-12	-10	-4	3	5	6	8	8	9
Bartenders (G512)/(NOC6452)	-1	2	5	9	16	23	27	31	35	39	43
Food and Beverage Servers (G513)/(NOC6453)	-14	-14	-7	15	53	94	110	124	137	148	159
Hotel Front Desk Clerks (G715)/(NOC6435)	-12	-14	-6	17	58	101	121	140	158	174	190
Light Duty Cleaners (G931)/(NOC6661)	-43	-68	-79	-64	-24	20	52	82	112	140	168
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	6	3	3	9	22	36	40	43	46	49	51
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-6	-9	-9	-3	8	21	25	28	32	34	36
All other occupations in accommodation	-30	-46	-39	11	107	211	255	293	330	361	390

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	-632	-902	-695	-127	740	2,149	2,841	3,521	4,150	4,657	4,883
Restaurant & food service manager (A221)/(NOC0631)	-150	-181	-176	-142	-86	13	66	120	170	211	230
Food Service Supervisors (G012)/(NOC6212)	-26	-27	-16	5	35	79	103	126	149	168	179
Cashiers (G311)/(NOC6611)	-17	-56	-64	-50	-18	48	47	45	38	23	-11
Chefs (G411)/(NOC6241)	2	-7	6	34	78	145	174	202	228	248	257
Cooks (G412)/(NOC6242)	-25	-130	-168	-157	-106	20	60	100	132	146	120
Maîtres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	-18	-11	11	45	90	152	188	224	258	289	310
Bartenders (G512)/(NOC6452)	-12	12	52	103	165	246	308	369	429	485	532
Food and Beverage Servers (G513)/(NOC6453)	-137	-79	85	327	641	1,076	1,356	1,633	1,900	2,141	2,324
Bakers (G942)/(NOC6252)	-16	-25	-30	-31	-30	-23	-21	-19	-17	-17	-20
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-199	-206	-78	151	469	941	1,160	1,374	1,575	1,742	1,831
Delivery drivers (H714)/(NOC7414)	-14	-18	-19	-16	-11	-1	3	8	12	16	17
All other Food and Beverage occupations	-21	-172	-296	-397	-487	-547	-604	-661	-723	-794	-888
Recreation and Entertainment	-11	-898	-930	-423	139	544	794	1,104	1,439	1,812	2,117
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	-23	-50	-57	-47	-37	-31	-28	-22	-16	-8	-3
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	-1	-12	-13	-7	0	5	8	12	16	20	24
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	-15	-99	-85	-10	72	137	177	223	272	325	370
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	162	101	104	131	168	195	211	230	250	272	289
Cashiers (G311)/(NOC6611)	-15	-46	-51	-37	-22	-13	-9	-4	2	10	15
Security Guards and Related Occupations (G631)/(NOC6651)	-14	-27	-28	-19	-10	-4	1	7	14	21	27
Casino Occupations (G723)/(NOC6443)	-6	-89	-94	-49	0	35	57	85	115	148	175
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	-50	-107	-116	-89	-62	-44	-36	-24	-10	6	18
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	-8	-26	-29	-23	-16	-12	-10	-7	-3	1	4
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-2	-30	-31	-16	0	12	19	28	38	49	58
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	-8	-40	-30	5	43	74	97	123	150	178	204
All other Recreation and Entertainment occupations	-32	-473	-500	-261	2	189	306	452	612	790	935
Travel Services	-31	-18	-51	-90	-126	-147	-212	-279	-350	-401	-490
Retail Trade Managers (A211)/(NOC0621)	-1	-2	-7	-12	-17	-21	-28	-34	-41	-47	-55
Travel Counsellors (G711)/(NOC6431)	-15	-10	-23	-38	-52	-60	-86	-112	-141	-162	-197
All other Travel Services Occupations	-15	-5	-21	-40	-58	-67	-99	-132	-168	-193	-238
Total Tourism and Related Industries	-789	-2,047	-1,816	-457	1,475	3,794	4,890	6,027	7,143	8,212	8,916

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

3.5. Summary of Findings

In this Section, we have provided a general overview of the tourism market and products in the Vancouver Coast and Mountains 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 Vancouver, Coast and Mountains region is projected to grow at an average compound rate of 1.7% per year between 2010 and 2020, which is slightly faster than the labour demand growth in the tourism and hospitality sector in BC over the same period (1.6% per year).

Within the sector in the region, employment in the air transportation and in the food and beverage services industry are expected to grow faster than the average rate of the entire sector, while employment in rail transportation as well as in the travel services industry is expected to grow more slowly than the sector average. In total, about 32,180 new full-year jobs are expected to be generated in the region as a result of increased tourism activities between 2010 and 2020. Because this region is the population centre in the province, the number of potential new jobs accounts for almost 69% of all potential new job openings in the province.

In addition, we have shown that a total of 39,170 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 Vancouver, Coast and Mountain region tourism and hospitality sector is slightly younger than their provincial counterparts.

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

Industry/Occupation	Mainland/Southwest			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Air transportation	1,740	2,710	2.0%	2,360	4,100	1.8%
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	380	630		520	960	
Pursers and Flight Attendants (G712)/(NOC6432)	290	450		400	670	
Airline Sales and Service Agents (G713)/(NOC6433)	360	560		490	830	
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	120	190		150	290	
Air Transport Ramp Attendants (H737)/(NOC7437)	100	140		130	220	
All other Air Transportation Occupations	480	740		660	1,130	
Rail transportation	30	150	0.8%	30	230	0.6%
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	10	70		10	100	
Railway Conductors and Brakemen/women (H722)/(NOC7362)	20	80		20	130	
Other Transportation	2,880	4,700	1.7%	3,850	7,260	1.6%
Transportation Managers (A373)/(NOC0713)	60	130		80	200	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	50	60		70	80	
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	120	190		150	270	
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	880	1,460		1,180	2,290	
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	390	640		510	990	
All other Transportation Occupations (excl. air)	1,370	2,220		1,840	3,430	
Accommodation	3,890	5,530	1.7%	7,560	11,030	1.7%
Accommodation Service Managers (A222)/(NOC0632)	240	490		520	1,090	
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	160	160		340	360	
Chefs (G411)/(NOC6241)	110	100		170	190	
Cooks (G412)/(NOC6242)	100	130		220	260	
Bartenders (G512)/(NOC6452)	40	30		80	50	
Food and Beverage Servers (G513)/(NOC6453)	360	290		780	560	
Hotel Front Desk Clerks (G715)/(NOC6435)	390	800		840	1,650	
Light Duty Cleaners (G931)/(NOC6661)	1,140	1,500		1,720	2,840	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	150	320		310	630	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	140	140		290	240	
All other occupations in accommodation	1,070	1,570		2,300	3,160	

Industry/Occupation	Mainland/Southwest		BC			
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Food & Beverage Services	17,720	16,600	1.8%	25,250	24,720	1.7%
Restaurant & food service manager (A221)/(NOC0631)	1,380	2,330		1,980	3,780	
Food Service Supervisors (G012)/(NOC6212)	470	550		680	890	
Cashiers (G311)/(NOC6611)	1,110	970		1,580	1,520	
Chefs (G411)/(NOC6241)	1,010	920		1,350	1,340	
Cooks (G412)/(NOC6242)	2,480	2,760		3,530	4,070	
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	560	370		790	550	
Bartenders (G512)/(NOC6452)	540	360		770	540	
Food and Beverage Servers (G513)/(NOC6453)	3,750	2,470		5,390	3,690	
Bakers (G942)/(NOC6252)	180	250		270	370	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	4,860	4,070		6,960	5,570	
Delivery drivers (H714)/(NOC7414)	150	240		220	390	
All other Food and Beverage occupations	1,220	1,310		1,740	2,010	
Recreation and Entertainment	4,870	7,120	1.5%	6,420	10,990	1.3%
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	130	280		170	440	
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	60	110		70	180	
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	560	530		740	850	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	320	390		430	610	
Cashiers (G311)/(NOC6611)	160	160		210	250	
Security Guards and Related Occupations (G631)/(NOC6651)	70	140		80	240	
Casino Occupations (G723)/(NOC6443)	450	800		520	1,040	
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	290	370		390	580	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	80	180		100	280	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	150	150		200	200	
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	230	370		300	540	
All other Recreation and Entertainment occupations	2,380	3,640		3,220	5,780	
Travel Services	1,050	2,360	1.4%	1,240	3,450	1.2%
Retail Trade Managers (A211)/(NOC0621)	70	160		80	250	
Travel Counsellors (G711)/(NOC6431)	390	860		450	1,240	
All other Travel Services Occupations	590	1,340		700	1,960	
Total Tourism and Related Industries	32,180	39,170	1.7%	46,700	61,800	1.6%

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

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

In absolute terms, because of the size of the sub-industries, the accommodation industry, the food and beverage services industry and the recreation and entertainment industry are expected to generate the largest share of the projected labour shortages. For example, by 2020, expected labour shortage in the accommodation industry accounts for 13% of all shortages in that year in the tourism and hospitality sector, while shortage in the food and beverage services industry accounts for 55% of all shortages in that year in the sector. Expected shortage in the recreation and entertainment industry will account for 24% of the total shortages in the sector in that year.

When expressed as a percentage of potential labour supply, the overall labour shortages are projected to be about 1% of labour supply (or equivalent to 1,480 full year jobs) in 2014, gradually increasing to almost 5% of labour supply (or equivalent to 8,920 full year jobs) by 2020.⁵ Again such a pattern is in line with the occupational labour imbalance patterns in the CTHRC/CBoC study.

In relative terms, the air transportation industry and the recreation and entertainment industry are expected to experience shortages more intensely than the sector average, with shortages reaching 6% of labour supply by 2020. For occupations, air pilots, flight engineers and flying instructors; transportation managers; bus drivers, subway and other transit operators; chefs; bartenders; maîtres d'hôtel and hosts/hostesses; food and beverage servers; program leaders and instructors in recreation and sports; retail sales persons; and landscaping and ground maintenance labourers are occupations likely to face the most severe labour 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

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.

jobs for employers to fill. As we showed in Figure 4, over the 10 year period there are expected to be a total of 39,170 full-year job openings for replacement needs, or about 3,910 openings to fill per year. This is in addition to a total of 32,200 full-year jobs (or about 3,220 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