

The British Columbia Tourism Labour Market Strategy (2012 – 2016)

Technical Report & Research Backgrounder

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1. The Impetus & Imperative

The British Columbia (BC) tourism and hospitality sector has been and will continue to be one of the province's most significant economic and employment growth drivers. In order for the sector to remain vibrant, viable, and competitive, achieving its growth targets, it must have an effective, innovative labour market strategy.

In the spring of 2010, go2 – the tourism industry's labour market and HR agency – embarked on a comprehensive process to review and update the *2003 Tourism HR Action Plan*, with support of tourism and hospitality sector partners, as well as the BC Ministry of Jobs, Tourism and Innovation.

This technical report provides a summary of the process and research undertaken to support the updated Tourism Labour Market Strategy.

Looking 10 Years Back...

In the fall of 2001 – faced with a looming shortage of skilled labour – 28 CEOs, general managers, human resource directors, industry association leaders and tourism educators formed a task force to lead the strategy project *Recruit, Retain & Train: Developing a Super, Natural Tourism Workforce in British Columbia*.

More than 100 industry representatives participated through several working groups, ensuring that task force members considered diverse, industry-wide perspectives regarding tourism's workforce needs. Working from October 2001 to April 2003, the task force developed a 5-year plan and established a coordinating organization and industry governance structure.

The Action Plan resulted in go2 being mandated as the agency to coordinate the labour force initiatives and strategies outlined in the Plan.

A key goal in revising the existing provincial Tourism HR Action Plan is to build on the successes achieved as a result of the implementation of recommendations included in the 2003 HR Action Plan. A review of these action areas, achievements, and possible alternatives was a key activity in the strategy update. Some examples of the successes:

- Broad BC tourism business utilization of customized workforce planning materials and services via a central portal – www.go2hr.ca; ¹

¹ For 2010 the www.go2hr.ca website received over 700,000 unique visits, with visitation increasing each year since 2003.

- Creation of a tourism Industry Training Organization to oversee the expansion of word class trades training across the industry, including increase of Professional Chef apprentices by over 900 or 46% in 3 years since the ITO was created;
- Establishment of a biennial industry compensation survey and database (now expanded to national level), as well as other labour market projections and relevant studies;
- Several initiatives to expand tourism operator recruitment of immigrants and foreign workers;
- Several website, social media and branding tools and initiatives to promote tourism careers and jobs to students, various labour force groups and the general public, including 450 tourism career awareness sessions to over 12,000 students in BC high schools; and,
- Promotion of retention tools and best practices including a “For Employers” section of the portal website and (with Tourism BC) *The Employees First Guide*.

Going Forward...

Over a one-year period ending in early 2012 and with the support of the BC Ministry of Jobs, Tourism and Innovation, go2 led a process to review and update the *2003 Tourism Human Resources Action Plan*. This included updating research, scanning trends and best practices in other jurisdictions, assessing progress in B.C. over the past several years, undertaking direct consultations with industry and stakeholders across B.C., and developing practical, specific strategies going forward over the next five years.

While the review and assessment has been exhaustive, this work is nonetheless a “refresh” of the highly successful 2003 Action Plan. Industry has been continually reviewing and updating the 2003 Action Plan strategies and tactics on an ongoing basis, often with strong alignment with provincial and federal government policies and programs. As a result, there is much continuity with past successes in the updated strategy, with specific enhancements and refocusing of priorities to take the industry’s labour market competitiveness to the next level.

In developing the TLMS, approximately 1,000 tourism and hospitality industry representatives and stakeholders were reached through discussions with the go2 Board and 3 working groups, employer and employee surveys, and ten regional consultation sessions. In addition, the Project Team reviewed numerous pertinent domestic and international sources of data, research and best practices reports. This rich body of work and input reflected in Chart 1 has enabled go2 and its partners to update the 2003 Action Plan to reflect changing economic, business context and labour market conditions.

Chart 1
Inputs for Updating the Tourism Human Resource Action Plan



In developing and implementing an updated strategy, it is critical to ensure that provincial strategy and regional tourism strategies are linked to labour market initiatives. BC's tourism industry is diverse in many ways, and the new strategy will need to reflect this.

Two key themes were identified during the research. The first one is addressing labour and skills shortages. The second one is the need for a segmented or stratified approach to addressing tourism operators' human resource needs. We have heard from many tourism operators and tourism regional and sector associations that a cookie-cutter approach will not work in meeting their workforce needs, and that strong partnerships amongst all stakeholders are a key to success.

2. The Situational Context

The Big Picture

Notwithstanding various tourism developments, in BC and beyond, key drivers that will continue to affect the tourism labour market include:

- An aging population and workforce, reducing the size of the available labour pool, but creating the opportunity to retain older workers with flexible HR practices;
- Declining fertility rates, reducing the size of the youth cohort, a crucial labour force component for tourism operators;
- An increasing knowledge-based economy and use of technology, meaning changes in skills and work practices;
- Increased globalization and interdependent economies and policies, increasing opportunities to recruit from other countries, and potentially more vulnerability to shocks and other developments around the world;
- Increased worker mobility, increasing opportunities to recruit from outside one's company (but also enhancing risks of losing talent), and greater opportunities for common occupational standards;
- Increased global competition for talent from employers in other jurisdictions and other industries, making good HR practices more valuable than ever.

Another important consideration is global economic uncertainty and volatility. This will have implications for contingency planning, for prioritization of strategies and tactics, and for how the TLMS is implemented and updated.

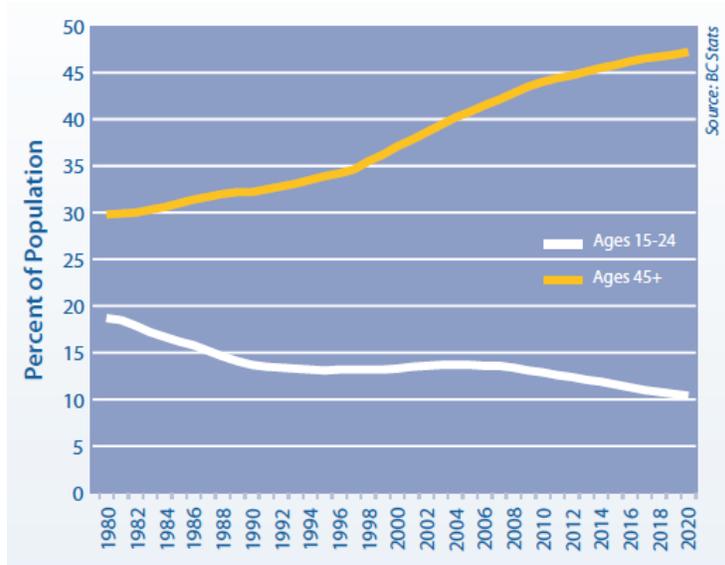
Population and Labour Force

Rick Miner, in *People Without Jobs, Jobs Without People* (2010), states: "There is a looming demographic and labour market crisis which has the potential to shake the very foundations of our society and economy. This crisis arises from the intersection of two mega-trends: an aging population and an emerging knowledge economy."² The Conference Board of Canada estimates that 20% of Canada's working age population will reach retirement by 2025 – not far away.³ Chart 2 below poignantly shows the increasing proportion of the BC population 45 years and older and the declining youth cohort.

²Rick Miner, Ph.D. *People Without Jobs, Jobs Without People*. February 2010.

³ Conference Board of Canada. *Immigrant-Friendly Businesses: Effective Practices for Attracting, Integrating, and Retaining Immigrants in Canadian Workplaces*. November 2009.

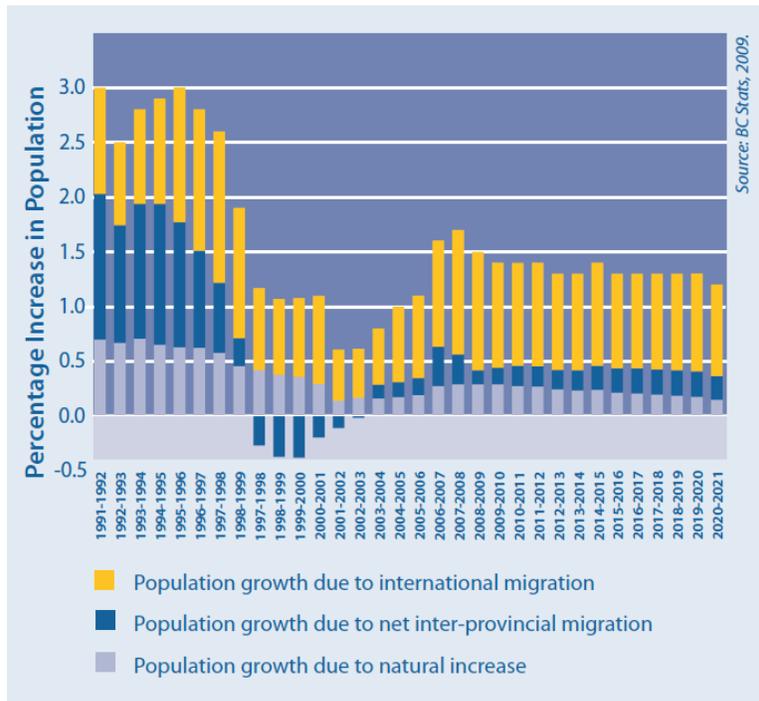
Chart 2
Aging of the BC Population



Source: Ministry of Jobs, Tourism and Innovation. *Skills for Growth*. 2010.

As Chart 3 shows, the majority of current and future population growth in BC will come from international immigration.

Chart 3



Source: Ministry of Jobs, Tourism and Innovation

Also, as the Business Council of BC indicates, population in many BC regions is shrinking or expected to grow relatively slowly. Since only 11% of British Columbians live outside the Lower Mainland, Vancouver Island and Thompson Okanagan regions, employers have a small pool of workers from which to recruit.⁴ They reported that “all regions except the Lower Mainland and the Northeast have seen their ‘core’ working age population (25-49) decline. In the Cariboo and Northcoast/Nechako the number of people in this age cohort has slumped by 20% or more over the past 10 years.”⁵

Labour Market Cycles

At a macro level, since 2003 the tourism industry has undergone one full labour market cycle, responding to the extreme labour shortages during the 2006-2008 period, as well as the sharp labour market contraction in late 2008 during the global recession. This labour market cycle taught the industry many valuable lessons about recruitment and retention planning that must be more formally and collectively evaluated for incorporation into an updated province-wide strategy. Foremost is the need for a multi-faceted and balanced approach that is flexible and responsive to changing conditions, particularly when changes are more sudden and sharper than anticipated.

Major Events and Developments

Since 2003 a number of significant external events have impacted the tourism system. These include events such as SARS, terrorism-related traveler restrictions, unprecedented fuel price inflation, natural disasters such as the mountain pine beetle infestation and forest fires, Canadian exchange rate inflation, and others. Furthermore, the implosion of BC’s traditional inbound tourist markets in recent years – particularly the U.S., Japan, and Mexico – has had a profound impact on the industry’s competitive position, structure and possible responses. Conversely, rapid upturns can also cause challenges if the industry and tourism operators do not anticipate them and are not prepared.

There have been a number of events that have taught the industry many valuable lessons that must be more formally assessed and incorporated into a new strategy. Foremost is the recent hosting of the 2010 Olympic and Paralympic Winter Games, including the many infrastructure developments and related workforce planning associated with Games-related preparations. Additional events and developments

⁴ Business Council of BC, October 2011, op. cit., page 27.

⁵ Ibid., page 26.

have also repositioned the industry, such as the development of new emerging markets and the removal of barriers to inbound visitation from the Asia-Pacific region. Another development has been the mass adoption of new technologies intended to reduce labour costs coupled with the wholesale shift toward the use of technology for planning and booking travel.

Internal Industry Changes

The BC tourism industry has also undergone dramatic internal changes since the 2003 strategy was developed, including but not limited to:

- Expansion and recognition of go2 as the industry's central HR/workforce coordinating agency;
 - Establishment of the tourism and hospitality Industry Training Organization and Health and Safety Association under the go2 umbrella;
- Creation of approximately thirty new community Destination Marketing Organizations (DMOs) in communities across BC, and significant advancement in tourism planning and marketing via these DMOs and our six regional DMOs; and,
- Considerable tourism destination and resort development, coupled with a significant increase in market-ready product development, as well as overall sector maturation and professionalization
- Reintegration of planning and promotions of the provincial DMO – Tourism BC – within the provincial government.

Broad Tourism Industry Trends

Over the last two decades, B.C.'s tourism sector has generally experienced steady growth (with the exception of occasional dips resulting from significant geopolitical and health events that affect travel decisions) and, likewise, the long-term potential of the sector is generally very positive. According to BC Stats, tourism is the single largest "primary resource industry" in the province, generating an annual real GDP (\$2002) of \$6.3 billion in 2009, ahead of forestry (\$1.96 billion), mining, oil and gas extraction (\$4.14 billion), and agriculture (\$1.62 billion).⁶ A key benefit of tourism is that it has the potential to contribute to the economic, environmental and social health of literally every community in the province.

⁶ Ministry of Jobs, Tourism and Innovation. *The Value of Tourism in British Columbia: Trends from 1999 to 2009*. April 2011.

In 2003, the year the Tourism HR Action Plan was published, B.C.'s tourism sector generated approximately \$9.8 billion in revenue, 4.0% of GDP, and 112,200 jobs. These jobs represented 5.6% of the labour force.⁷

As Table 1 (next page) shows, by 2010, B.C.'s tourism revenue is estimated at \$13.45 billion, up from a previous peak of \$13.33 billion in 2008. The sector generated over 4% of GDP and provided 127,400 direct jobs (5.6% of the provincial employment). Overall, between 2004 and 2010, B.C.'s tourism revenues grew by a total of 25.5%, representing an average annual growth rate of 4.2%.

As Table 1 demonstrates, BC's revenues over the period 2004-2010 experienced fluctuations with short-lived dips amid long-term growth. However, the decline in 2009 is expected to be temporary due to a number of factors, including the tremendous exposure from the 2010 Games; the granting of Approved Destination Status for Canada in China; and long-term global tourism growth trends (i.e., global tourism arrivals have been increasing at four times the rate of global population growth over the last 12 years). Yet all of this is contingent on the health and stability of the global economy.

Employment trends in BC tourism will be discussed in detail in the next section. Direct tourism employment has grown 24.4% over the last decade (2000-2010) or a sizeable annual average of 2.4%, despite the 2008-09 downturn.⁸ These numbers refer to direct tourism employment, and not the broader definition of tourism sector or tourism-related jobs.

While the current economic climate has eased challenges related to labour force shortages, the industry knows that this is a short-term situation. With the passing of the recession and associated travel activity rebounds, the ability of tourism operators to grow and prosper will be highly dependent on their ability to recruit and retain good workers.

2010 Tourism Recovery⁹

BC Stats recently indicates that tourism is an important sector in BC, generating nearly \$6.5 billion of real gross domestic product (GDP) in 2010 (making up over 4% of the province's total real GDP). Further, as indicated earlier, the BC tourism industry grew by 4.3% in 2010, following a 2.7% downturn in the previous year.

⁷ Ibid.

⁸ BC Stats. *BC Tourism and High Technology GDP and Employment: 1998-2010*. http://www.bcstats.gov.bc.ca/data/bus_stat/bcea/satacct.asp

⁹ Unless otherwise indicated, all statistics in this sub-section are from: BC Stats. "Tourism Sector Recovers in 2010". *Infoline Report*, Issue 11-40, October 7, 2011.

Table 1 provides a summary of key tourism economic trends in BC during 2004 through 2010. Generally, BC tourism shows a healthy bounce-back or recovery from the 2008-2009 recession.

Table 1
BC Tourism Industry Trends, 2004-2010

BC Tourism	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Revenue (\$ million)	9,339	9,582	9,720	9,799	10,717	11,465	12,208	12,911	13,332	12,661	13,446
<i>% change</i>	8.7	2.6	1.4	0.8	9.4	7.0	6.5	5.8	3.3	-5.0	6.2
GDP (\$ million)	5,048	5,191	5,238	5,233	5,692	6,150	6,510	6,881	7,068	6,744	7,197
<i>% change</i>	5.0	2.8	0.9	-0.1	8.8	8.0	5.8	5.7	2.7	-4.6	6.7
Real GDP (\$2002 million)	5,263	5,273	5,238	5,261	5,579	5,883	6,080	6,282	6,359	6,185	6,450
<i>% change</i>	3.9	0.2	-0.7	0.4	6.0	5.5	3.4	3.3	1.2	-2.7	4.3
Implicit price index (2002 = 100)	95.7	98.3	100.0	99.4	102.0	104.5	107.1	109.5	111.1	109.0	111.6
<i>% change</i>	1.3	2.7	1.7	-0.6	2.6	2.5	2.5	2.2	1.5	-1.9	2.4
Employment, SEPH ('000)	102.4	109.9	110.1	112.2	115.2	118.4	123.5	127.3	131.4	128.7	127.4
<i>% change</i>	0.5	7.3	0.2	1.9	2.7	2.8	4.3	3.1	3.2	-2.1	-1.0
Wages & salaries (\$ million)	3,200	3,374	3,352	3,387	3,607	3,834	4,148	4,369	4,553	4,362	4,389
<i>% change</i>	3.0	5.4	-0.7	1.0	6.5	6.3	8.2	5.3	4.2	-4.2	0.6
Consumption taxes (\$ million)	849	864	936	988	1,049	1,090	1,092	1,091	1,007	984	1,210
<i>% change</i>	7.3	1.8	8.3	5.5	6.2	3.9	0.2	-0.1	-7.6	-2.3	23.0

Source: BC Stats. "Tourism Sector Recovers in 2010". *Infoline Report*, Issue 11-40, October 7, 2011.

Tourism revenues increased by 6.2% in 2010, to \$13.4 billion. The sub-sectors with most revenue growth in 2010 were Retail (+5.4%), Transportation (+6.3%) and Accommodation & Food Services (+7.9%).

In 2010, nearly three-quarters of economic activity in tourism was represented by Accommodation & Food Services (36%) and Transportation & Related Services (35%), with 10% coming from Retail.

Air and Water Transportation and related services (e.g. operation of airports, harbours, etc.) are the largest industries within the Transportation category, including bus, taxi and rail services.

Among the main tourism sub-sectors, Accommodation & Food Services had the largest gain (+6.3%) in GDP in 2010, driving most of the growth for the industry. This sub-sector also reached its highest level of employment ever in July 2011 at 194,600. The second highest month was September 2011, at 187,700. This is a 16.9% year over year increase since last September, or 27,000 jobs. This is a 10.5% increase since January 2011 or a growth of 17,800 jobs. This compares with employment growth for all industries in BC of 35,000 or 1.5% year over year and 48,100 or 2.1% since January 2011.

The BC tourism workforce earned \$4.4 billion in wages and salaries in 2010, a 0.6% increase despite slightly (1.0%) declining employment. This is likely due to higher pay, with average weekly wages increasing 1.7% to \$660.70. While earnings in Transportation & Related decreased 4.4%, Retail (+2.4%) and Accommodation & Food Services increased by 4.1%.

In comparing revenue generated by the BC tourism industry and wages and salaries paid to tourism workers, the trend over the last 6 years shows an increase in revenue generated per wages and salaries paid. Tourism revenue increased by 25.5% or \$2.73 billion; and wages and salaries increased by 21.7% or \$0.78 billion. This means during 2004-2010, this ratio increased from \$2.97 generated per \$1 wage/salary paid to \$3.06 per \$1; or a 3% increase in this ratio.

Lastly, BC tourism tax revenue increased by 7.6% in 2010, totaling over 2.5 billion in tax revenues for all levels of government.¹⁰

¹⁰ BC Stats, op. cit.

Government Policy Context

Federal Government

In addition to its agreements with BC (Canada-BC Labour Market Development Agreement, Canada-BC Labour Market Agreement and Canada-BC Immigration Agreement), the federal government is involved in labour market matters through programs administered by Human Resource and Skills Development Canada, its immigration policy and programs, labour market initiatives for Aboriginal people, and *Canada's Federal Tourism Strategy*, led by Industry Canada.

In recent years, the federal government has made improvements in the Federal Skilled Worker Program, the Temporary Foreign Worker Program and International Experiences Canada. These improvements have reflected a shift toward economic immigration. While improvements have been made, the BC tourism industry has called for additional enhancements to make these programs flexible and responsive to local, regional and provincial labour market needs. Also, more alignment between labour market needs and family class immigration could be pursued.

Earlier this fall, the Honourable Maxime Bernier, Minister of State (Small Business and Tourism), launched the National Tourism Strategy to “help position Canada’s tourism sector for long-term growth and global competitiveness...[it] will better align the tourism activities of some 15 federal departments and agencies.”¹¹ The initiative includes 30 measures in four priority areas, including “fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality.”

BC Government

Gaining the Edge: BC Tourism Strategy

Launched in October 2011, *Gaining The Edge: A Five-Year Strategy for Tourism in British Columbia, 2012-2016*, is the first sector strategy launched by the BC Government under the *BC Jobs Plan*.¹² It is intended to increase marketing efforts in areas that most compel people to choose BC, including the following areas: touring vacations; city experiences; skiing-snowboarding; Aboriginal tourism; outdoor adventure/ecotourism, and meetings and conventions. This Labour Market Strategy will further support existing initiatives, such as partnerships with ski resorts for seasonal recruitment support, and training world class culinary experts for our many restaurants and attractions in urban and increasingly in rural areas.

¹¹ Minister of State (Small Business and Tourism). “Minister of State Bernier Launches New Tourism Strategy to Strengthen Canada’s Tourism Advantage.” *News Release*. October 6, 2011.

¹² Ministry of Jobs, Tourism and Innovation. *Gaining the Edge: A Five-Year Strategy for Tourism in British Columbia, 2012-2016*. 2011.

The Strategy's target is an annual five percent growth in tourism revenue – reaching \$18 billion by 2016. The Strategy emphasizes marketing partnerships with industry, regions and communities.

Within its goal of "World Class Visitor Experiences", the BC Tourism Strategy references the importance of the "human element" to achieving success in terms of the tourism experience: "A well-trained, consumer-focused workforce is a critical aspect of the tourism experience."¹³ The workforce-related actions in the Strategy are:

- Work with the tourism sector to ensure that labour market strategies are in place that identify and address the industry's unique labour market pressures.
- Work with stakeholders including employers, secondary and post secondary educators to address gaps and capitalize on opportunities in training and education programs.
- Work in partnership with tourism human resource and training delivery organizations to provide a range of industry training tools across the province.

This research report has assessed key factors related to the achievement of these actions and directions.

For several years go2 has been a key partner in assisting with the development of the Ministry's work on workforce issues, and vice versa, to ensure that the priorities and strategies identified by go2, the industry and the Ministry are aligned and complementary.

Labour Market Policy and Programs

Since 2003, a number of provincial government developments have occurred which are pertinent to an updated Tourism HR Action Plan. It is critical that this tourism labour market strategy builds on existing industry-government partnerships and alignment with the workforce and tourism policies and priorities of the Province, as well as federal and even local levels of government.

Overall Canadian and British Columbian labour market policy and programs have shifted toward more flexible, efficient and demand-sensitive labour market measures. Notable trends in labour market policy developments in BC include the following:

- A Canada-BC Immigration Agreement with new, flexible provisions and funding, including improvements in policy and processes regarding temporary foreign workers, Provincial Nominees, and visa and international students;

¹³ Ibid., p. 29.

- A new BC Labour Market Outlook with occupational demand and supply projections, as well as the Job Trend Tracker for viewing and comparing forecasts;
- Increased emphasis on ensuring training and employment programs are linked to labour market demand;
- Creation and expansion of the Industry Training Authority and subsequent seven Industry Training Organizations, including a tourism ITO within go2;
- Increased focus on trades and technical skills and local/regional labour market development by post-secondary institutions and government programming;
- Targeted initiatives for under-represented/utilized labour force groups such as Aboriginal people, persons with disabilities, older workers, and others;
- Devolution of Employment Insurance (EI) and related programming to BC under a Canada-BC Labour Market Development Agreement;
- A Canada-BC Labour Market Agreement providing programming for non-EI clients, including low-skilled workers.

Earlier in 2011, provincial ministries were restructured to create a new Ministry of Jobs, Tourism and Innovation (MJTI). In addition to including immigration, labour market and productivity and innovation responsibilities, the Ministry is responsible for tourism and former Tourism BC responsibilities, as well as the BC Jobs Plan. Most recently, Premier Clark announced this ministry's 2012-2016 Tourism Strategy that is intended to be implemented through a partnership of government and industry.

This provincial public policy environment has fostered a general business development focus since 2001, including industry-led processes, flexible labour markets, fact-based industry development approaches, and regional economic development. While still relatively new, these industry-led and government supported processes, such as the creation of a tourism ITO and the tourism health and safety association in partnership with WorkSafeBC, have already demonstrated considerable successes in enhancing industry knowledge and capacity through the sharing of best practices and coordinated planning.

Skills for Growth

Also of note is *Skills for Growth: BC's Labour Market Strategy to 2020*¹⁴. This comprehensive provincial initiative supports economic growth and a higher quality of life through 3 goals:

1. Increase the skill level and labour market success of British Columbians.
2. Attract workers and entrepreneurs from outside the province who meet BC's regional economic needs.

¹⁴ Ministry of Regional Economic and Skills Development. *Skills for Growth: British Columbia's Labour Market Strategy to 2020*. 2010..

3. Improve workplace productivity.

Within each of these goals, there are several objectives and actions that will be linked to in the Tourism Labour Market Strategies later in this document. Most notable ones relevant to tourism operator needs relate to expanding apprenticeship, making post-secondary education more flexible and responsive to industry needs, recruiting permanent immigrants and temporary foreign workers, productivity improvement through workplace training, and enhancing industry health and safety training and practices.

This is all supported by high quality and accessible labour market information and the BC labour market forecasting model, the BC Labour Market Scenario Model.

Canada Starts Here: The BC Jobs Plan¹⁵

In September 2011, Premier Christy Clark announced the Province of BC's Jobs Plan. The Plan has three "pillars" to address recent economic uncertainty and to ensure robust growth in the future:

- Working with employers and communities to enable job creation across BC;
- Strengthening our infrastructure to get our goods to market; and,
- Expanding markets for BC products and services, particularly in Asia.

These pillars will be supported by the Government's continuing commitment to ensure BC's skills and training programs "lead the way to the jobs of tomorrow."

Most importantly, the BC Jobs Plan identified eight sectors including tourism for sector-specific strategies. Tourism and the other industries were selected because they drive new investment in BC, BC has a competitive advantage in tourism, and every community in BC (both Aboriginal and non-Aboriginal) has its local economy supported by tourism. Tourism and the other industries have been identified as "critical for BC's growth."

This *Tourism Labour Market Strategy*, and thus go2's mandate align with key actions identified in the BC Jobs Plan and which build on existing initiatives, including:

- Creating partnerships to ensure training spaces are matched with regional employment needs, and participating in regional workforce tables – go2 and regional partners are working together to meet these needs;
- Participating in sectoral partnerships on skill and workforce needs – go2 and tourism sector associations have worked together on a number initiatives

¹⁵ *Canada Starts Here: The BC Jobs Plan*. Government of British Columbia. September 2011.

described in this labour market strategy, and will explore additional opportunities;

- Participating in a provincial trades training conference – go2's Tourism ITO plays an important role in promoting innovative and effective trades training programs for tourism operators;
- Promoting BC's extended Apprenticeship Training Tax Credit to tourism operators – through its website and other information vehicles, go2 promotes this and other employer and workers training and employment programs, services and other supports..

Further many other strategies in this Action Plan will support the growth of tourism throughout the province.

Ministry of Jobs, Tourism and Innovation (MJTI) Service Plan

MJTI's 2012/13 – 2014/2015 Service Plan includes the following goals, all of which will be supported by a long-term tourism business plan and a supporting HR strategy:

1. British Columbia is recognized as a preferred place to invest and do business.
2. Investment potential in B.C.'s regions and communities is maximized.
3. British Columbia is positioned as one of North America's preferred tourism destinations.
4. British Columbia has a highly skilled and competitive labour force.
5. B.C.'s knowledge-based society and economy are advanced through leadership in research and innovation.

The updating of the *BC Tourism Labour Market Strategy* complements these goals and many of the Ministry Service Plan's supporting objectives.

Industry Training Programs

BC's industry training system has evolved over the past two decades. Increasingly, employers – including tourism operators – have called for flexible, relevant workplace-based training that directly responds to provincial and regional economic needs. This includes developing formal standards and credentials that enable worker mobility and transferability, and which provide confidence for employers that their training costs have a strong return on investment.

In 2004, the BC Government created the Industry Training Authority (ITA) to achieve a truly industry-driven trades training system for employers and workers. . The ITA's vision is "Highly skilled and productive people making British Columbia's industries

prosperous and globally competitive.” In its *2012/13-2014/15 Service Plan*¹⁶, the ITA sets three goals:

1. The industry training system makes valuable contribution to B.C.’s prosperity.
2. Employers and industry have the skilled workers they need to be successful.
3. Individuals are recognized for their skills and knowledge and have opportunities to develop to their full potential
4. Credentials are valued by a broad range of industries and individuals, and align with the economic needs of B.C.
5. Employment-based apprenticeship training is viable, efficient and effective in producing credentialed workers

The BC tourism industry has its own Industry Training Organization (ITO) through go2, managing cook/chef, baker, meatcutter, and tidal angling guide education, training and apprenticeship programs.

The BC tourism industry and go2 – through its ITO – has responded to what operators needed in one of the province’s largest trades – Professional Cook. This program and the Baker and Meatcutter programs have been reviewed by go2 and industry. Participation, credentials, interest and innovation have increased within the tourism industry through go2’s and its partners’ improvements and promotion of these programs. These efforts have also led to the first brand new tourism apprenticeship program in several years, the Tidal Angling Guide for open ocean sport fishing guiding.

The ITA and go2 have also worked together to promote the trades to young people in school and increased participation in tourism-related programs in the Secondary School Apprenticeship Program and the Accelerated Credit Enrolment in Industry Training Program.

Tourism apprenticeship outcomes will be discussed further later in this report.

¹⁶ Industry Training Authority. *ITA Service Plan: 2012/13-2014/15*. 2012.

3. The BC Tourism Labour Market and Human Resources

A 2009 tourism labour market study undertaken at the national level by the Conference Board of Canada for the CTHRC¹⁷ near the peak of the global financial crisis demonstrated that the tight tourism labour market across Canada experienced prior to the 2008/09 global recession was bound to return in the very near future due to a variety of economic and demographic forces. Within the BC tourism sector, signs of labour market pressures in certain regions and occupations began re-emerging as soon as the worst depths of the economic downturn was over, by late 2009 / early 2010. These labour shortages and related pressures are expected to increase gradually and then more rapidly in the latter half of the next 10 years.

In terms of general labour market trends, data reported by the Ministry of Jobs, Tourism and Innovation (in *British Columbia Labour Market Outlook: 2010-2020*) projects 1.027 million job openings in BC over the next decade due to retirements and economic growth.¹⁸ The result will be a tight labour market supply situation in most regions (first in the Cariboo and Northeast regions) of the province by 2016 with the increase in demand for workers expected to exceed the growth in supply of workers by approximately 61,500 by 2020. Additionally, according to the Ministry of Jobs, Tourism and Innovation's BC Labour Market Outlook, the BC labour market will increasingly rely on new migrants (i.e. from other parts of Canada and other countries) to fill job openings – one-third of total openings to 2020.

This section highlights current and expected labour market trends in BC and the tourism industry. It will include highlights of key labour demand and supply trends as well as demand/supply gaps and other labour market and human resource issues.

BC General Labour Market Trends

Some fundamental trends in BC's economy are shaping the developments in its labour market. These trends include the following:

- A significant shift from a primarily resource-based economy to a diverse knowledge-driven economy. Employment in primary industries was nearly one-third of the total provincial jobs in the 1970s and has declined to 19.6% as of 2010, while service-producing industries represented over 80% of total BC employment.¹⁹

¹⁷ Conference Board of Canada, op. cit.

¹⁸ Ministry of Jobs, Tourism and Innovation. *BC Labour Market Outlook: 2010-2020*. 2011.

¹⁹ BC Stats. *Labour Force Survey Summary Tables, September 2011*. October 2011.

- Increasing regional diversity and growing opportunities for economic development to many major resource-based projects and their impacts on services required in local communities.
- BC has a higher proportion (86.4%) of small businesses and self employment (19.2%) than all parts of Canada except Saskatchewan (87.3 and 19.3%).²⁰
- As Canada's Pacific Gateway, BC is becoming a trade hub for goods and services and people traveling to and from the Asia-Pacific region to Canada and the U.S.
- The advancement and application of new technologies in both goods and service industries and their implications for productivity, required skills, and other workforce facets.

At a broad level, there are a number of key labour market trends in BC that have direct implications for the demand for and supply of human resources across the economy, including tourism. These include the following:

- A significant number of new job openings (450,000 new jobs plus 676,000 openings from retirements), a substantial number potential vacancies when one considers there are currently only 650,000 young people in BC's K-12 education system – even if all of them fit well into new job openings, it leaves almost half a million openings to be filled through other means.²¹
- The “Baby Boomer” generation has started to reach retirement age, meaning that 56,000 to 62,000 people in BC will retire each year between 2010 and 2020. This combined with lower birth rates and rising life expectancies means more pressure on labour force supply.²²
- The increasing rate of change and application of technology is increasing the number of new skills workers will have to acquire in the future. BC's increasingly knowledge-based economy is also raising the bar in terms of level of education and training needed by workers. Compared to 67% only 3 years ago, BC's *Skills for Growth* strategy to 2020 indicates: “...78 percent of job openings over the next decade will require a college diploma, trade certificate, university degree, or higher. Many of these new jobs will require advanced skills, including increased science and technology skills.”²³
- The “War for Talent” has arrived, with most other developed jurisdictions around the world having the same aging and declining birthrate challenges. BC employers will increasingly be challenged to increase their recruiting workers from outside BC and from other countries.

²⁰ BC Stats, Ministry of Jobs, Tourism and Innovation, and Western Economic Diversification Canada. *Small Business Profile 2011*. 2011.

²¹ Ministry of Jobs, Tourism and Innovation, op. cit.

²² Ministry of Jobs, Tourism and Innovation, op. cit.

²³ *Ibid.*, p.6. Note: *Skills for Growth* (2009) indicates that 77% of job openings will require post-secondary education, whereas the updated Labour Market Scenarios Model (2010) indicates that this has increased to 78%.

- Both the *BC Labour Market Outlook* and the recent Business Council of BC labour supply report emphasize the increased labour shortages in certain regions of the province in the coming decade.²⁴ As regional economies grow and diversify and their populations leave and age, more people and people with new skill sets and entrepreneurs will be vital to supporting this. The increasing diversity of BC regions also means “cookie-cutter” labour market strategies will not be as effective going forward.
- BC’s labour productivity has fallen behind the Canadian average (6th among provinces). As Skills for Growth states, increasing workforce productivity through “strategic investments in human resources” (as well as via new methods of production and physical capital such as machinery and equipment), “can decrease the demand for labour” and “improve the returns and profits for employers, and drive up wages for workers.”²⁵
- BC’s workforce is becoming more diverse, with a growing Aboriginal youth cohort, immigrants filling a higher proportion of new job vacancies, some older workers staying in the workforce longer, and persons with disabilities becoming increasingly job-ready,. Tourism employers will need to continue to tap under-utilized talent pools in order to fill jobs in the future.

The largest tourism-related occupations (in which the majority of the jobs are in tourism) in BC in terms of employment in 2010 were:²⁶

Food counter attendants, kitchen helpers and related occupations	47,000
Cooks	30,300
Food and beverage servers	29,900
Restaurant and food service managers	16,200
Program leaders and instructors in recreation, sport and fitness	12,900
Chefs	8,800
Bakers	6,300
Accommodation service managers	5,900
Bartenders	5,000
Food service supervisors	5,300
Maitres d'hôtel and hosts	3,700

One challenge regarding recent labour market trends is how quickly things can change. For example, increasingly, conventional wisdom suggested that the aging of the Canadian population will mean higher rates of retirements and decreased labour supply. However, two recent pieces of research raise questions about this assumption. Statistics Canada found that the employment rate of individuals 55 or over has grown from 22% in 1997 to 34% in 2010.²⁷ A CBC poll conducted by

²⁴ Business Council of BC. October 2011, op. cit.

²⁵ Ministry of Jobs, Tourism and Innovation. 2010, op. cit., p. 7.

²⁶ Ministry of Jobs, Tourism and Innovation. *BC Labour Market Scenario Model, 2010-2020*. September 2011.

²⁷ Y. Carriere and D. Galarneau, Statistics Canada. “Delayed Retirement: A New Trend?” *Perspectives on Labour and Income*. October 26, 2011

Harris/Decima found that 80% of British Columbians (highest in Canada) plan to continue working in retirement.²⁸

While this trend may mean more people than expected will be available to work, it also suggests employers will need to accommodate the needs and preferences of older workers and this will further increase workplace diversity and the generational differences.

What is the result of all these and other economic and labour market trends for BC's tourism industry? As mentioned at the start of this report and as one will see in subsequent sections, labour shortages are not coming – there are here, they are expected to build up and become more widespread as we get closer to 2020. That is, unless tourism organizations and operators work together to minimize or prevent such talent gaps.

Tourism Labour Supply Trends

This section describes the key potential sources of human capital for BC tourism operators. Labour supply sources include youth currently in the education system, immigrants and non-residents with temporary work permits, as well as various labour force groups that have been traditionally under-utilized in tourism and other industries (e.g. Aboriginal people, persons with disabilities, and others).

Post-Secondary Education Outputs and Outcomes

The B.C. tourism post-secondary system has evolved significantly from 2003 through 2011, increasing from approximately 200 programs in 2003 to nearly 300 programs in 2011. Sixty per cent (173) of the programs were in public institutions, where more than 6,000 students were enrolled in 2011.

Overall, the tourism education and training system in B.C. is recognized for its innovative and relevant programming. This is verified by former student surveys which show high education-related employment rates of former tourism and hospitality students within both the tourism sector and in other sectors. The data also suggest that former students of technical/trades training programs are more likely to work directly within their field of study.

²⁸ Tracy Sherlock. "Working Beyond the Age of 65: The New 'Retirement' Reality." *Vancouver Sun*. October 26, 2011.

Enrolments, Completion and Credentials

The overall pattern of tourism-related enrolments among the 25 public post-secondary institutions in BC showed a 12.6% growth (in headcount) from 6,830 in 2006/07 to 7,688 in 2009/10.²⁹ This consisted of the following components:

- *Hospitality Administration/Management* (includes: Hospitality Administration/Management, General; Tourism and Travel Services Management; Hotel/Motel Administration/Management; Restaurant/Food Services Management; Resort Management; and Other Hospitality Administration/Management) – Increased from 2,354 to 2,752, or 16.9%.
- *Culinary Arts and Related Services* (includes: Cooking and Related Culinary Arts, General; Baking and Pastry Arts/Baker/Pastry Chef; Culinary Arts/Chef Training; Food Preparation/Professional Cooking/Kitchen Assistant; Meat Cutting/Meat Cutter; Institutional Food Workers; and Other Culinary Arts and Related Services) – Increased from 2,504 to 2,666 during this same period, or 6.5%.
- *Parks, Recreation, Leisure and Fitness Studies* (includes: Parks, Recreation and Leisure Studies; Parks, Recreation and Facilities Management) – Increased from 887 to 978 or 10.3%.
- *Leisure and Recreational Activities* (includes: Leisure and Recreational Activities, General) – Increased from 1,085 to 1,356, or 25.0%.

Credentials awarded during 2006/07-2009/10 increased for the 21 public institutions (colleges, institutes and teaching universities) excluding the 4 research universities, by 14.0% or from 1,709 to 1,948.³⁰ From a separate database, credentials in tourism-related programs at the research universities increased from 208 to 419, or roughly 200%.³¹ The research university data is for *calendar* year instead of *fiscal* year.

Table 2 shows the headcount and credentials awarded in the same tourism-related post-secondary programs during 2006/07-2009/10 at the 21 colleges, institutes and teaching universities.

²⁹ Ministry of Advanced Education. *Central Data Warehouse, October 2010 Submission, Program Level and Credentials Awarded pivots*. July 2011.

³⁰ Ibid.

³¹ Ibid.

Table 2
Headcount and Credentials Awarded by Region
Tourism-Related Post-Secondary Programs

Region	Headcount					Credentials Awarded				
	06/07	07/08	08/09	09/10	Change (%)	06/07	07/08	08/09	09/10	Change (%)
Mainland/Southwest	2,539	2,469	2,927	2,739	200 7.9	768	784	756	803	35 4.6
Vancouver Island/Coast	1,376	1,358	1,405	1,521	145 10.5	538	404	42	369	-169 -31.4
Thompson-Okanagan	944	1,084	1,192	1,218	274 29.0	181	166	228	210	29 16.0
Kootenay	429	455	515	453	24 5.6	162	140	183	130	-32 -19.8
Cariboo	181	156	155	201	20 11.0	46	62	59	116	70 152.2
North	248	191	134	175	-73 -29.4	88	99	62	38	-50 -56.8
Total	5,717	5,713	6,328	6,307	590 10.3	1,783	1,655	1,710	1,666	-117 -6.6

Source: Ministry of Advanced Education, *Central Data Warehouse*. 2011³².

While the enrolments show steady growth, it is difficult to determine why the credentials awarded for colleges, institutes and teaching universities showed a decline.

The Thompson-Okanagan region overall saw the most growth with 29% growth in enrolments and 16% growth in credentials. The Cariboo region also experienced growth in both indicators (11% and 152.2%, respectively). The Mainland/Southwest saw modest growth in both. The Northern BC region experienced a decrease of 29.4% in tourism-related enrolments and a 56.8% decline in credentials awarded. Vancouver Island/Coast and Kootenay regions both saw growth in enrolments and declines in credentials.

There is no similar data available on enrolments and credentials for private training institutions. In a 2010 report produced by the Private Career Training Institutes Agency for the 12-month period ending November 1, 2009, two tourism-related programs were most prevalent.³³ Nine Food & Beverage Server programs were delivered in this period, with a total of 998 enrolments and 1,022 graduates. Eighteen Chefs programs were delivered, involving 451 enrolments and 345 graduates.

While the numbers for post-secondary institution enrolment and credentials include apprenticeship programs, they are not specifically broken out in the above figures,

³² Difference in total headcount and credentials awarded in prior table due to data suppression.

³³ Private Career Training Institutes Agency. *PCTIA Focus on Enrolment*, 2009. 2010.

except programs in private training institutions are not included. Table 3 below shows data from the ITA for the Baker, Meatcutter and Professional Cook programs.³⁴

Table 3
Tourism and Hospitality Apprenticeship Programs

Trade	Active Apprentices			
	September 2008	September 2011	Difference	Percent Change
Professional Cook	1982	2,888	906	45.7%
Baker	195	148	-47	-24.1%
Meatcutter	60	101	41	68.3%
Total	2,237	3,137	900	40.2%

These statistics show 40% growth overall for the three-year period ending September 30, 2011, including 906 additional Professional Cook apprentices, for a 45.7% increase during this period. This trend can be attributed to improvements such as greater engagement with industry (including go2hr becoming the Industry Training Organization for the tourism and hospitality industry in 2006), more focused program marketing, and more capacity in the number of training seats and the ways to achieve credentials.

Student Outcomes³⁵

An important part of post-secondary education data-gathering is what is called student outcomes, through which post-secondary graduates are surveyed months after graduation and asked about their current employment and other questions geared toward assessing the effectiveness and relevance of their training.

Outcomes data has been obtained from the Ministry of Advanced Education for the period 2006 through 2010 for Baking and Pastry Arts/Baker/Pastry Chef, Culinary Arts/Chef Training, Food Preparation/Professional Cooking/Kitchen Assistant, Parks Recreation and Leisure Studies, and Parks Recreation and Leisure Facilities Management Programs.

In response to questions about whether they are currently employed, job relevance to training, and whether they are in permanent jobs, the positive responses are all

³⁴ Industry Training Authority. *ITA Performance Measurement Report, Updated to September 30, 2008*; and *ITA Performance Measurement Report, Updated to September 30, 2008*.

³⁵ Data for this sub-section provided by the Ministry of Advanced Education, and sourced from: 2006-2010 *Diploma, Associate Degree, and Certificate Student Outcomes Survey*; 2006-2010 *Baccalaureate Graduates Survey*; and 2006-2010 *Apprenticeship Student Outcomes Survey*. July 2011.

quite high, ranging from the mid-70% to mid-90% range. Table 4 provides annual averages for three culinary program areas.

One difference in terms of whether they were employed in a permanent job and whether they were in a training-related job. Graduates in Parks, Recreation and Leisure Studies and Facilities Management programs were slightly lower than the other three categories, ranging from 41% to 84% for the two questions compared to 76% to 97% over the four years.

Average starting hourly wages for recent graduates were \$12-\$14 for Baking/Pastry and Culinary Arts/Chef and Food Prep/Kitchen Asst. graduates, compared to \$14-\$19 for the Parks, Recreation and Leisure Studies and Facilities Management graduates. However, the graduates from lower wage categories had a higher education satisfaction rating than the higher wage programs. Seventy-five to 91% of the graduates of Baking/Pastry/etc., Culinary Arts/Chef and Food Prep/Kitchen Asst. programs rated their education “very/somewhat useful” in getting a job”. The figure was 62% to 80% for the Parks & Recreation-related program graduates.

The data in Table 4 demonstrate that former students of tourism-related programs may work in a variety of occupations – many of which may not be considered traditional “tourism” occupations. The exception is for cook/chef and bakers, where a high proportion of jobs become open for recent graduates – primarily from these specialized trades training programs.

Table 4
Diploma and Certificate Student Outcomes: Employment Outcomes 2006-2010
Includes Community Colleges, Institutes, and Teaching-Intensive Universities

Program Area (6-digit CIP Codes) ¹		Respondents	Response Rate	Currently Employed	Employed In Permanent Job	Unemployment Rate ²	Average Hourly Wage (main job) ³	Median Hourly Wage (main job) ³	Rated Education "Very/Somewhat Useful" in Getting Job	
120501	Baking and Pastry Arts/Baker/Pastry Chef									
		2010	62	62%	84%	91%	9%	\$12	\$12	84%
		2009	49	51%	76%	86%	12%	\$12	\$12	91%
		2008	55	56%	93%	98%	6%	\$13	\$12	83%
		2007	47	57%	85%	87%	5%	\$12	\$11	87%
		2006	46	55%	85%	97%	5%	\$12	\$12	83%
120503	Culinary Arts/Chef Training									
		2010	141	50%	81%	82%	10%	\$13	\$13	75%
		2009	143	51%	85%	78%	10%	\$13	\$13	81%
		2008	147	52%	86%	87%	5%	\$14	\$13	82%
		2007	145	54%	81%	93%	10%	\$13	\$12	84%
		2006	146	48%	86%	85%	5%	\$12	\$12	84%
120505	Food Preparation/Professional Cooking/Kitchen Assistant									
		2010	130	49%	78%	79%	11%	\$13	\$12	86%
		2009	126	53%	79%	76%	13%	\$14	\$12	89%
		2008	167	48%	78%	86%	16%	\$13	\$12	84%
		2007	176	56%	85%	84%	5%	\$13	\$12	78%
		2006	167	47%	82%	85%	10%	\$12	\$11	85%

¹There were either no survey respondents or the data are not shown to preserve confidentiality in the following programs: 120500 Cooking and Related Culinary Arts, General; and 120506 Meat Cutting/Meat Cutter.

²Unemployment rate - percentage is out of those in the labour force.

³Hourly wage data obtained since 2005. Monthly salary data only available before 2005.

An area of the outcomes data where there was relative variability among the program areas was graduates' unemployment rates (from 2% to 16% depending on year and program) and not being in the labour force (from 2% to 19%). However, there were no discernible patterns. For instance, some had higher unemployment rates in 2008 and 2009 (recession period) while others had lower unemployment rates.

The outcomes research also included survey apprentices, particularly in the Culinary Arts/Chef Training program category. Whether they were currently employed, currently in a training-related job, or employed in a permanent job, graduates of apprentice programs showed significantly higher ranges than the programs mentioned above. Unemployment rates and non-labour force participation rates were both significantly lower, and average hourly wages were higher (\$16-\$18). Further, their satisfaction rating with their programs was 85% to 95% over the four-year period; significantly higher than for graduates of the other program categories mentioned earlier.

Table 5 looks at graduates from a different perspective; it shows the occupations in which former tourism-related program graduates have been working over the last four years ending in 2010.

Table 5
Most Frequent Occupations of Graduates in Tourism-Related Programs
(2006-2010)

Occupations (including National Occupational Classification no.)	New Entrants to the BC Labour Market	
	n	%
6242 - Cooks	854	27%
6241 - Chefs	198	6%
6252 - Bakers	179	6%
6435 - Hotel front desk clerks	116	4%
6453 - Food and beverage servers	93	3%
6421 - Retail salespersons and sales clerks	80	3%
6641 - Food counter attendants, kitchen helpers and related occupations	77	2%
0631 - Restaurant and food services managers	72	2%
6431 - Travel counsellors	58	2%
5254 - Program leaders and instructors in recreation, sport and fitness	54	2%
Subtotal	1781	56%
All other occupational groups for tourism-related program graduates	1412	44%
Total	3193	100%

Table 6 shows tourism-related graduates from another angle. It lists the most frequent programs of study for graduates employed in key tourism-related occupations during 2006-2010.

Table 6
Most Frequent Programs of Study for Graduates Employed in Selected Tourism-Related Occupations 2006-2010

Programs of Study (including Classification of Instructional Programs [CIP] codes)	New Entrants to the BC Labour Market	
	n	%
120503 - Culinary Arts/Chef Training	663	8%
520201 - Business Administration and Management, General	619	7%
120505 - Food Preparation/Professional Cooking/Kitchen Assistant	509	6%
521401 - Marketing/Marketing Management, General	369	4%
520903 - Tourism and Travel Services Management	269	3%
520401 - Administrative Assistant and Secretarial Science, General	245	3%
120501 - Baking and Pastry Arts/Baker/Pastry Chef	236	3%
420101 - Psychology, General	225	3%
520901 - Hospitality Administration/Management, General	210	2%
230101 - English Language and Literature, General	192	2%
240101 - Liberal Arts and Sciences/Liberal Studies	181	2%
260101 - Biology/Biological Sciences, General	170	2%
520301 - Accounting	160	2%
540101 - History, General	141	2%
520304 - Accounting and Finance	140	2%
450701 - Geography	117	1%
470604 - Automobile/Automotive Mechanics Technology/Technician	104	1%
460201 - Carpentry/Carpenter	103	1%
451001 - Political Science and Government, General	100	1%
450601 - Economics, General	96	1%
Subtotal	4,849	55%
All other tourism-related program graduates for occupational groups	3,934	45%
Total	8,783	100%

One conclusion drawn from this data is that employers hire graduates from a variety of fields of study and that a significant number of these graduates have direct tourism training. Five of the top ten programs of study of recent graduates working in the tourism industry were tourism and hospitality programs.

Labour Force Groups

Youth

The BC tourism industry is the largest employer of 15-24 years olds (30.3% of its total workforce) and also often represents the first job for young people in the province. While the 15-24 year old cohort will have the lowest labor force growth rate over the next 20 years, is it still a significant labour pool overall. The youth unemployment rate in January 2012 is nearly double the provincial average – 13.5% versus 6.9% - and much higher than the over-25 age groups (5.8%). The pool of unemployed youth in September was 54,500.³⁶

Youth unemployment will get more attention in Canada as it is seen as a risk to global recovery. The federal Human Resources Minister, the Honourable Diane Finley, recently said, "getting more young people working requires better relationships with industry and other levels of government." This sentiment has led G20 countries to meet and develop strategies to address youth unemployment in September 2011.

The youth cohort is not necessarily a homogenous group of job-seekers or potential employees. In the context of increasing youth awareness about and recruiting youth into tourism jobs and careers, the industry needs to consider various youth segments (e.g. high school students, post-secondary students, youth employees, unemployed youth, youth in rural communities, etc.), and tailor its marketing and promotion. There are also youth segments with under-utilized labour force groups such as Aboriginal people, immigrants, and persons with disabilities.

Immigration and Foreign Workers

The BC Government indicates that immigration will be BC's key driver of labour force growth.³⁷ The Conference Board of Canada cites Statistics Canada data that indicates after 2025, *all* net population growth in Canada is expected to come from immigration.³⁸

Immigrants, temporary foreign workers and various foreign student programs are a critical source of human resources for tourism operators throughout BC. In addition to the Federal Skilled Worker Program, the tourism industry has increasingly relied on the BC Provincial Nominee Program (PNP), the federal Temporary Foreign Worker Program (TFWP), as well as International Experiences Canada Program and international student programs.

³⁶ BC Stats. Labour Force Survey Summary Tables, September 2011. Data from Statistics Canada, *Labour Force Survey*.

³⁷ Government of BC. *Skills for Growth: British Columbia's Labour Market Strategy to 2020*. 2010.

³⁸ Conference Board of Canada, op. cit.

Through the support and promotion of go2 and industry sector associations, tourism operators have become much more engaged in the foreign worker/student programs, involving tens of thousands of jobs each year. go2's Foreign Worker Guide for Tourism and Hospitality Employers has become very popular and useful, with over 1,600 downloads between 2006-2011.

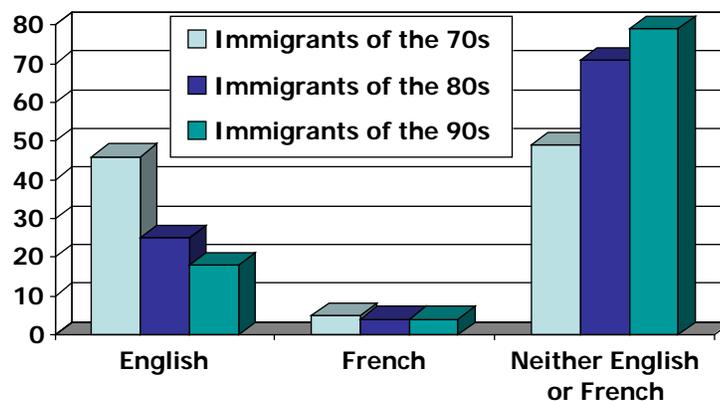
A key barrier to participating in immigration/foreign worker programs for tourism employers involves the challenge of going through the process to apply and qualify for recruiting immigrants and foreign workers – particularly the Labour Market Opinion process with regard to the TFWP. Barriers for immigrants and workers to succeed in their migration and to find meaningful employment include having their foreign credentials recognized, language, familiarity with workplace culture and practices, and geography mismatches (i.e. not able or willing to locate in a rural area for employment).

The number of immigrants is not the whole story. As Chart 4 (next page) shows, immigrants increasingly lack language skills upon entering Canada.

Temporary Foreign Worker Program (TFWP)

Despite the challenges with recruiting foreign workers, with the majority of new labour force growth in the coming decades being immigrants, this trend in tourism recruiting will need to continue. During this project, tourism operators and associations throughout BC identified many challenges in accessing these programs, particularly the TFWP. During 2006-2011, while 18,229 positions were confirmed in Labour Market Opinions (LMOs) for tourism occupations in BC, another 15,247 were refused – a 45.6% refusal rate.³⁹

Chart 4
Skills of Immigrants in Canada, 1970s, 1980s, 1990s



³⁹ Service Canada. *go2 Freedom of Information Request to Service Canada*. 2011.

A typical TFWP recruitment requires considerable effort to compile and at considerable expense, and operators are often frustrated and/or confused about the reasons for LMO refusals. As a recent Business Council of BC survey concluded, "...many of the respondents that have had to obtain an LMO found the process long, pedantic, and a disincentive for employers and foreign candidates to immigrate to Canada."⁴⁰ Often these can involve regional nuances and local challenges unknown by reviewing agencies, despite general efforts and some successes with engaging and responding to industry.

As indicated, the TFWP in particular is an important tool for tourism particularly on a regional basis. As the Business Council concluded, "The diversity of locations where temporary workers have settled suggests they can be an effective resource for meeting regional labour demand. In contrast to permanent immigrants, of whom just 15% settle outside of Metro Vancouver, close to half of all temporary workers are located outside of the Greater Vancouver region."⁴¹ Another benefit of the TFWP is that it is being increasingly used as a path to permanent residency.

In its recent comprehensive report on labour force growth, the Business Council calls for "smart immigration policy," where the TFWP "can play a role in expanding and adding to the flexibility of labour supply, particularly in an economy that remains subject to cyclical swings" (and we would add, subject to global shocks).⁴² Also, international students – given this element of the recently announced BC Jobs Plan – and International Experiences Canada participants also add flexible labour supply sources for employers.

Provincial Nominee Program (PNP)

The BC PNP has seen positive growth and increased flexibility, and will continue to be important for tourism operators, particularly the Entry-Level and Semi-Skilled (ELSS) category of the Strategic Occupations class. For the top 15 PNP tourism occupations of 3,412 applications, 2,799 were nominated, with only 613 (18%) being refused.⁴³ BC tourism employers have also indicated a high satisfaction rating for the PNP in the go2 employer survey, rating the program 3.69/5.0 (the TFWP and FSWP were 3.46 and 3.22, respectively, out of 5.0). As a result, industry strongly feels that the BC PNP should be expanded and not decreased in order to respond to future labour demand changes.

⁴⁰ Business Council of BC. *Results of the Temporary Foreign Worker Program and Provincial Nominee Program Survey*. March 2011.

⁴¹ Business Council of BC. October 2011, p. 9.

⁴² *Ibid.*, p. 45.

⁴³ Ministry of Jobs, Tourism and Innovation. *BC Provincial Nominee Program*. November 2011.

According to a review of the ELSS Pilot Project:⁴⁴

- There are 22 ELSS occupations, including 15 in tourism.
- ELSS is 21% of total Strategic Occupation nominations in PNP.
- Ninety percent of ELSS nominations are in tourism, including 47% of total nominations outside the Lower Mainland.
- Sixty-five percent of ELSS nominations have been for Food Counter Attendants (NOC 6641) and Food and Beverage Servers (NOC 6453), totaling 896. Chef and Cooks totaled 381 in 2010. Also, 13%, 5% and 4% of ELSS nominations have been for light duty cleaners, hotel front desk clerks, and truck drivers, respectively.

One can see the importance to the tourism industry of continuing the ELSS component of PNP.

International Students and Mobile Youth

This is an important labour market supply demographic for the BC tourism industry that could represent an area of opportunity for employer recruitment. Overall the International Experiences Canada program (formerly the Working Holiday Program) is highly utilized and well regarded by industry.

There are many attributes to the programs that make it ideal for some operators, including the relative ease of securing potential employees (there is no LMO process) as well as the lack of requirements to transport or settle workers (similar to lower skilled LMO workers).

The International Experiences Canada program received the highest score of all foreign worker programs by operators involved in the employer survey, scoring 4.0 out of 5.0.

A related labour supply, post-graduation foreign students who have completed their studies in Canada, also has the potential to grow in the future. This is particularly true given the recent objective in the BC Jobs Plan to double the number of international exchange students admitted to BC post-secondary institutions.

Another potential opportunity is related to the spring 2011 decision of CIC to begin enabling international student graduates of private training institutions to work in Canada post-graduation. With tens of thousands of international students in various tourism and non tourism related programs in private institutions, the opportunities to strategically recruit from this pool are significant.

⁴⁴ Ministry of Jobs, Tourism and Innovation. *Entry-Level and Semi-Skilled (ELSS) Pilot Project Program Review, Tourism and Hospitality, July 21, 2011*. Power Point Slides.

Aboriginal People

In contrast to the overall youth population in BC, the Aboriginal population is relatively young. By 2026, it is projected that the percentage of Registered Indian and Non-Status Indian populations 14 years old and younger will be 24% and 35%, respectively, compared to 15% for the total Canadian population.⁴⁵ By the same year, the median age of the total Aboriginal population in BC is projected to be 31.0 years compared to 43.3 years for the total BC population.

According to the CTHRC, the BC tourism sector employs Aboriginal peoples at a higher rate than the overall Canadian tourism industry, with 3.2% of the tourism sector labour force in BC being Aboriginal. This compares to 2.8% for all of Canada.⁴⁶ Aboriginals constituted 4.1% of the overall BC labour force in 2006, meaning there is potential to increase Aboriginal participation rates in the BC (and Canadian) tourism labour force, particularly with the relatively fast growing Aboriginal youth population.⁴⁷

The underutilization of Aboriginal talent is also reflected in the much higher unemployment rates compared to non-Aboriginal labour force participants. For example, during 2008 through 2011 in BC, the annual unemployment rate for non-Aboriginals 15 years and over was 4.4%, 7.4%, 7.4%, and 7.2%.⁴⁸ In comparison, the Aboriginal rates for the same age group was 10.5%, 16.4%, 14.6% and 14.4% - essentially twice as high as for non-Aboriginals.

The Aboriginal Tourism Association of British Columbia (AtBC) is a non-profit, membership-based organization that is committed to growing and promoting a sustainable, culturally rich Aboriginal tourism industry.⁴⁹ It is a one-stop resource for Aboriginal entrepreneurs and communities who are operating or looking to start a tourism company. AtBC works closely with tourism, business, education and government organizations to help BC's Aboriginal tourism operators offer high-quality experiences and promotes these experiences to visitors and local residents.

In 2005, AtBC completed the development of its *Aboriginal Cultural Tourism Blueprint Strategy*, and began implementing it in 2006. The Strategy focused on strengthening and growing the Aboriginal cultural tourism industry in BC through three kinds of activities: 1) Building awareness of cultural tourism opportunities;

⁴⁵ Public Works and Government Services Canada. "Hope or Heartbreak: Aboriginal Youth and Canada's Future." *Horizon*, Volume 10, No. 1. 2008.

⁴⁶ Canadian Tourism Human Resource Council. *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. 2009.

⁴⁷ BC Stats. *BC Statistical Profile of Aboriginal Peoples 2006: With Emphasis on Labour Market and Post-Secondary Issues*. http://www.bcstats.gov.bc.ca/data/cen01/abor/ap_main.asp.

⁴⁸ B.C. Stats, *Labour Characteristics of the Off-Reserve Population*, based on Labour Force Survey data. May 2011.

⁴⁹ Aboriginal Tourism Association of BC. <http://www.aboriginalbc.com>.

2) Supporting product development through skills training, partnerships, and market readiness initiatives; and 3) Promoting products through a range of targeted marketing and communications programs.

One of AtBC's strategic goals is to "support tourism-based community, human resources and economic development in Aboriginal communities." AtBC and go2 have worked together on key awareness and promotion, training and employment programs. It is also important to note that Aboriginal tourism was identified as one of the product sector priorities in the 2011 Tourism Strategy.

Persons with Disabilities

Persons with disabilities are an important labour pool for tourism employers to tap into because they are under-utilized, representing an untapped potential of 300,000 people in BC – 34,000 with post-secondary diplomas, 30,000 with trade certificates, and 28,000 with university degrees.⁵⁰ Contrary to many myths about their employability and productivity, research indicates 90% of persons with disabilities who are under 35 have moderate to mild conditions and fewer than 20% required any accommodation in the workplace.⁵¹

The top five tourism occupations that employed the largest share of disabled persons in Canada were: taxi and limousine drivers and chauffeurs (18%); janitors and caretakers (17%); bus drivers and transit operators (17%); light-duty cleaners (17%); and ticket agents (16%).⁵²

According to Statistics Canada data, 96% of persons with disabilities did as well or better at jobs; and 86% rated average or better in attendance than non-disabled co-workers.⁵³

The proportion of persons with disabilities in the Canadian and BC tourism labour forces was 11.8% and 11.5%, respectively.⁵⁴ With the aging of BC's workforce and to tap into the older worker pool as well, tourism operators need to consider the labour supply source. go2 has supported this by focusing efforts to recruit qualified persons with disabilities to connect them with tourism jobs. This is also important when one considers that travelers with accessibility needs is one of the fastest growing international markets. According to go2, persons with disabilities in North America spend more than \$13 billion each year on travel.⁵⁵

⁵⁰ go2. *Vancouver International Airport: Recruiting People with Disabilities*. <http://www.go2hr.ca/ForbrEmployers/BCSuccessStories/VancouverInternationalAirportAuthority/tabid/898/Default.aspx>

⁵¹ BC Chamber of Commerce. *Closing the Skills Gap*. 2006.

⁵² Canadian Tourism Human Resource Council. *Demographic Profile of Tourism Sector Employees*. 2009.

⁵³ go2, op. cit.

⁵⁴ Canadian Tourism Human Resource Council, op. cit.

⁵⁵ Workforce Inclusion Initiative. *Our Mission, Our Vision*. <http://www.wiistepbc.ca/about-us/accessible-tourism-program/>

Further, an American national survey found:⁵⁶

- 92 % consumers felt more favourable towards businesses that hire people with disabilities.
- 87 % agreed they would prefer to give their business to companies that hire persons with disabilities.

Therefore employers who tap into this talent pool have a better chance of attracting such visitors.

In early 2011 go2 launched a pilot initiative to enhance the recruitment of persons with disabilities into tourism occupations, but it is premature to assess the program results and future opportunities at this time.

Older Workers

Another under-represented group and important potential growth source are older workers, usually defined as 50+ or 55+ years of age. This group is especially important for potential workers because, as mentioned earlier, people are living longer, and because of economic trends many are working beyond what was traditionally considered retirement age.

According to Statistics Canada, within ten years, the proportion of those 55 years and over in Canada will increase from 16.9% of the total labour force to close to one in four. Overall the average age of BC's labour force is increasing, and Statistics Canada expects labour force growth to slow and the labour force participation rate to decline over the next twenty years.⁵⁷

This all means, as has been heard from tourism operators throughout the province, that older workers are an important labour pool to access, particularly in many rural communities with relatively low population growth (and even declines).⁵⁸

Labour Market Projections: Supply and Demand

A crucial part of the 2011 *BC Tourism Labour Market Strategy* is projecting the nature and extent of labour market demand and potential labour shortfalls that could be expected because of insufficient labour supply. These made-in-BC tourism sector labour market projections will be continuously refined in methodology and updated.

⁵⁶ G. Siperstein, N. Romano, A. Mohler and R. Parker. "A National Survey of Consumer Attitudes Toward Companies that Hire People with Disabilities." *Journal of Vocational Rehabilitation*, 22 (2005), pp. 1-7.

⁵⁷ Statistics Canada. "Projected trends to 2031 for the Canadian Labour Force". *Canadian Observer*. August 2011, Catalogue #11-010.

⁵⁸ Business Council of BC, October 2011, op. cit.

As the Business Council of BC report on labour force supply suggested, “A comprehensive level of analysis is necessary to adequately understand looming sectoral shortfalls, and to develop well-grounded, industry-specific strategies to manage and meet future occupational requirements.”⁵⁹

In order to achieve this, Research and Labour Market Information Working Group was established to oversee the development of labour market projections in addition to other key quantitative data regarding sector labour market performance. This “blue ribbon” group was composed of key agencies with expertise in labour market analysis, including representatives of BC Stats, the Ministry of Jobs, Tourism and Innovation (BC Labour Market Outlook), Tourism BC, CTHRC, tourism operators, and researchers from the BC post-secondary education system.

As well as advising go2 on this priority, the Committee recommended that a qualified labour economist be retained. Dr. Roslyn Kunin, principal of Roslyn Kunin & Associates, Ltd. led an intensive project to develop new tourism sector labour market projections for BC. A summary of this work follows.

Before providing the results of these made-in-BC labour market projections, Table 7 summarizes the top tourism-related job openings for the period 2010-2020 based on the recent BC Government labour market forecast.

Table 7
Tourism-Related Employment Growth including Replacement, 2010-2020⁶⁰

Occupational Code	Occupational Category	Total Openings 2010-2020 (Expansion + Replacement)
NOC 063	Managers in food service and accommodation	11,200
NOC 624	Chefs and cooks	14,000
NOC 643	Occupations in travel and accommodation	7,900
NOC 644	Tour and recreation guides and casino operations	3,600
NOC 645	Occupations in food and beverage service	11,100
NOC 664	Food counter attendants, kitchen helpers and related occupations	14,600
NOC 667	Other occupations in travel, accommodation, amusement and recreation	1,800
	Top Tourism Employment Occupations	64,200

Source: Ministry of Jobs, Tourism and Innovation, *BC LM Outlook 2010-2020*. July 2011.

⁵⁹ Business Council of BC. October 2011, op. cit., p. 3.

⁶⁰Excludes other large occupational categories in which significant tourism employment exists in BC. For example, 34,635 job openings projected for Retail Salespersons; 32,010 openings for Cleaners; 29,241 openings for Drivers; 12,313 openings for Cleaners; and 5,499 openings for Athletes, Coaches, Referees and Related Occupations.

New BC Tourism Sector Labour Market Projections

Despite the 2008-2009 global recession and ongoing global economic volatility, the BC tourism industry continues to perform well, with episodic labour shortages re-appearing and gaining in frequency and duration. Communities within the Northeast region of the province, and in rural communities like Whistler, Tofino and parts of the Kootenay Rockies region are reporting acute shortages. Forty-five percent of tourism employers surveyed in May 2011 indicated they had at least one difficult-to-fill vacancy within the previous 12 months. Certain occupations continue to be difficult to fill in most regions of the province, including kitchen staff, cleaners, and many front-line service positions – particularly in peak seasons (summer and winter), as well as in resort and rural communities. Management and leadership skills shortages are apparent in some regions and increasingly prevalent according to many recruiting directors and management.

At the end of a recent comprehensive review of labour force supply in BC, the Business Council of BC concluded the following: “One thing is clear: the impending retirement of the large baby-boom generation heralds big changes for the labour market and will give rise to human resource issues for employers in many sectors of our economy.”⁶¹

Analysis

Roslyn Kunin & Associates was retained to project potential labour demand, potential labour force supply, and resulting labour surplus/shortage for tourism-related industries and occupations. This is a centre-piece of the Tourism Labour Market Strategy – for the first time, the tourism industry has a “made-in-BC” labour projection model.

RKA examined different data sources and labour market analysis models to develop an approach to develop a model to estimate potential labour supply and demand. This model was informed and is supported by BC Stats, the Canadian Tourism Human Resource Council, the Ministry of Jobs, Tourism and Innovation – both its BC Labour Market Outlook and Tourism BC sections.

RKA projects tourism sector employment to grow from 255,860 in 2010 to 300,080 by 2020, at an average rate of 1.6% per year during this period. Such an average rate of growth is higher than the average for all industries in the province.

RKA also estimate between 2012 and 2016, tourism sector employment is “projected to grow at an average rate of 2.1% per year, as real GDP in the sector is expected to grow on average 2.9% per year.”⁶² RKA indicates this is consistent with the provincial

⁶¹ Business Council of BC. People, Skills and Prosperity: The BC Labour Market in a Post-Recession Context. Business Council of BC. October 2011, p.56.

⁶² RKA, op. cit. p. v.

government’s projection of 5% per year of nominal GDP growth target for the tourism sector.

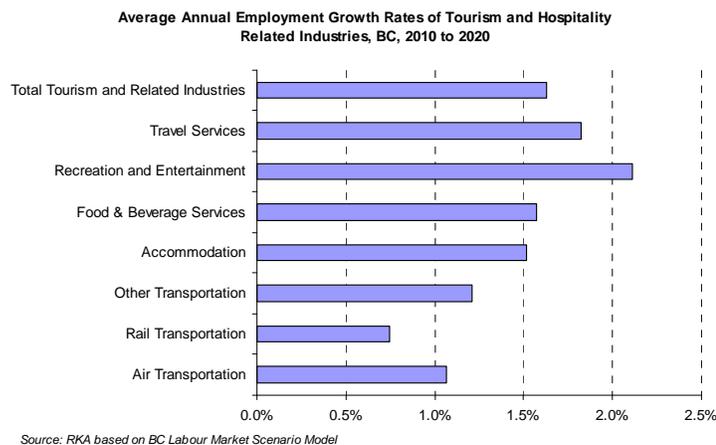
According to RKA, the combined new jobs from expansion (44,220) and openings from replacement needs (57,210) will total 101,430 job openings in tourism in BC by 2020 – as indicated, this is a significant 10% of the province’s expected job openings by 2020. RKA emphasized that that replacement openings are minimum estimates as there are also replacement openings due to turnover that RKA did not account for.

RKA concluded the following: “The upcoming demographic patterns described in the report indicate that the labour across all sectors will be tighter than it has been historically. Unless steps are taken in tourism and hospitality to at least hold and ideally improve its relative position, shortages could be much greater than the analysis of existing data indicate.”⁶³

Tables 8, 9 and 10 on the following pages present the total job openings by industry and occupation within each industry, by industry, and by occupation, respectively.

RKA found that the expected fastest growing tourism sectors will be Recreation and Entertainment (2.1%) and Travel Services (1.8%). Food & Beverage Services, Accommodation, and industries in Transportation are expected to grow more slowly than average. However, because of the sizes of the food and beverage services and accommodation industries, they are projected to generate the largest number of new job openings. As per Tables 8 and 9, Food & Beverage Services (43,410), Recreation and Entertainment (20,530), and Accommodation (18,920) accounted for 80% of total job openings to 2020. Chart 5 from RKA’s work shows the projected average annual employment growth rate for all tourism-related industries.

Table 5



⁶³ RKA, op. cit., p. vii.

Table 8
Projected BC Tourism-Related Employment Demand by Industry and Occupation, 2010-2020

Employment Demand by Industry and by Occupation	2010	2020	New openings due to expansion	Openings due to replacement needs	Total openings
Air transportation	11,090	12,330	1,240	3,380	4,620
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	2,450	2,720	270	870	1,140
Pursers and Flight Attendants (G712)/(NOC6432)	1,860	2,070	210	550	760
Airline Sales and Service Agents (G713)/(NOC6433)	2,320	2,580	260	690	950
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	770	850	80	250	330
Air Transport Ramp Attendants (H737)/(NOC7437)	640	710	70	180	250
All other Air Transportation Occupations	3,050	3,390	340	840	1,180
Rail transportation	570	610	40	200	240
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	260	280	20	90	110
Railway Conductors and Brakemen/women (H722)/(NOC7362)	310	340	30	110	140
Other Transportation	21,050	23,740	2,690	6,580	9,270
Transportation Managers (A373)/(NOC0713)	400	450	50	150	200
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	370	420	50	70	120
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	900	1,020	120	230	350
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	6,400	7,220	820	2,460	3,280
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	2,700	3,040	340	810	1,150
All other Transportation Occupations (excl. air)	10,270	11,580	1,310	2,860	4,170
Accommodation	43,870	50,980	7,110	11,810	18,920
Accommodation Service Managers (A222)/(NOC0632)	3,150	3,660	510	1,250	1,760
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	1,940	2,250	310	310	620
Chefs (G411)/(NOC6241)	820	960	140	180	320

Employment Demand by Industry and by Occupation	2010	2020	New openings due to expansion	Openings due to replacement needs	Total openings
Cooks (G412)/(NOC6242)	1,300	1,510	210	240	450
Bartenders (G512)/(NOC6452)	520	600	80	80	160
Food and Beverage Servers (G513)/(NOC6453)	4,750	5,530	780	530	1,310
Hotel Front Desk Clerks (G715)/(NOC6435)	5,130	5,960	830	1,580	2,410
Light Duty Cleaners (G931)/(NOC6661)	8,400	9,760	1,360	2,650	4,010
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	1,860	2,170	310	650	960
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	1,780	2,070	290	240	530
All other occupations in accommodation	14,210	16,520	2,310	4,090	6,400
Food & Beverage Services	128,830	150,540	21,710	21,700	43,410
Restaurant & food service manager (A221)/(NOC0631)	9,980	11,660	1,680	3,190	4,870
Food Service Supervisors (G012)/(NOC6212)	3,490	4,070	580	550	1,130
Cashiers (G311)/(NOC6611)	8,070	9,430	1,360	1,330	2,690
Chefs (G411)/(NOC6241)	5,620	6,570	950	1,200	2,150
Cooks (G412)/(NOC6242)	17,900	20,910	3,010	3,350	6,360
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	4,130	4,830	700	290	990
Bartenders (G512)/(NOC6452)	4,130	4,830	700	680	1,380
Food and Beverage Servers (G513)/(NOC6453)	28,040	32,770	4,730	3,150	7,880
Bakers (G942)/(NOC6252)	1,330	1,560	230	290	520
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	36,070	42,150	6,080	4,830	10,910
Delivery drivers (H714)/(NOC7414)	1,130	1,320	190	260	450
All other Food and Beverage occupations	8,940	10,440	1,500	2,580	4,080
Recreation and Entertainment	41,570	51,240	9,670	10,860	20,530
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	1,130	1,390	260	440	700
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	710	880	170	230	400
Program Leaders/Instructors in Recreation, Sport (F154)/(NOC5254)	4,810	5,920	1,110	790	1,900

Employment Demand by Industry and by Occupation	2010	2020	New openings due to expansion	Openings due to replacement needs	Total openings
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	2,480	3,060	580	510	1,090
Cashiers (G311)/(NOC6611)	1,360	1,670	310	230	540
Security Guards and Related Occupations (G631)/(NOC6651)	660	810	150	210	360
Casino Occupations (G723)/(NOC6443)	2,560	3,150	590	740	1,330
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	2,570	3,160	590	530	1,120
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	720	890	170	260	430
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	1,000	1,230	230	140	370
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	2,030	2,500	470	440	910
All other Recreation and Entertainment occupations	21,550	26,570	5,020	6,340	11,360
Travel Services	8,880	10,640	1,760	2,680	4,440
Retail Trade Managers (A211)/(NOC0621)	600	710	110	210	320
Travel Counsellors (G711)/(NOC6431)	3,310	3,960	650	1,020	1,670
All other Travel Services Occupations	4,980	5,970	990	1,440	2,430
Total Tourism and Related Industries	255,860	300,080	44,220	57,210	101,430

Source: RKA based on BC Labour Market Scenario Model

Table 9
Tourism-Related Job Openings (New + Replacement) by Industry, 2010-2020

Employment Demand by Industry	2010	2020	New openings due to expansion	Openings due to replacement needs	Total openings
Air transportation	11,090	12,330	1,240	3,380	4,620
Rail transportation	570	610	40	200	240
Other Transportation	21,050	23,740	2,690	6,580	9,270
Accommodation	43,870	50,980	7,110	11,810	18,920
Food & Beverage Services	128,830	150,540	21,710	21,700	43,410
Recreation and Entertainment	41,570	51,240	9,670	10,860	20,530
Travel Services	8,880	10,640	1,760	2,680	4,440
Total Tourism and Related Industries	255,860	300,080	44,220	57,210	101,430

Source: RKA based on BC Labour Market Scenario Model. November 2011.

Table 10
Top Tourism-Related Occupations by Total Job Openings (New + Replacement Jobs)

Employment Demand by Industry and by Occupation	2010	2020	New openings due to expansion	Openings due to replacement needs	Total openings
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	38,850	45,450	6,600	5,110	11,810
All other Recreation and Entertainment occupations	21,550	26,570	5,020	6,340	11,360
Food and Beverage Servers (G513)/(NOC6453)	32,790	38,300	5,510	3,680	9,190
Cooks (G412)/(NOC6242)	19,200	22,420	3,220	3,590	6,810
All other occupations in accommodation	14,210	16,520	2,310	4,090	6,400
Restaurant & food service manager (A221)/(NOC0631)	9,980	11,660	1,680	3,190	4,870
All other Transportation Occupations (excl. air)	10,270	11,580	1,310	2,860	4,170
All other Food and Beverage occupations	8,940	10,440	1,500	2,580	4,080
Light Duty Cleaners (G931)/(NOC6661)	8,400	9,760	1,360	2,650	4,010
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	6,400	7,220	820	2,460	3,280
Program Leaders and Instructors in Recreation, Sport and Fitness (F154)/(NOC5254)	6,750	8,170	1,420	1,100	2,520
Cashiers (G311)/(NOC6611)	9,430	11,100	1,670	1,560	3,230
All other Travel Services Occupations	4,980	5,970	990	1,440	2,430
Chefs (G411)/(NOC6241)	6,440	7,530	1,090	1,380	2,470
Total Tourism and Related Occupations	255,860	300,080	44,220	57,210	101,430

Source: RKA based on BC Labour Market Scenario Model. November 2011.

The top ten occupational categories expected to generate the largest number of new openings (new jobs + replacement jobs) are:

- Food Counter Attendants and Kitchen Helpers – 11,810
- All other Recreation and Entertainment occupations – 11,360
- Food and Beverage Servers - 9190
- Cooks – 6,810
- All other occupations in accommodation – 6,400
- Restaurant & food service manager – 4,870
- All other Transportation Occupations (excl. air) – 4,170
- All other Food and Beverage occupations – 4,080
- Light Duty Cleaners – 4,010
- Bus Drivers and Subway and Other Transit Operators – 3,280

Regional Labour Markets

Tourism Regional Studies: 2006-2009⁶⁴

Recognizing the highly diverse nature of BC's tourism regions, since 2003, go2 has developed regional labour market studies for five regions of BC: Sea-to-Sky region (2006); Kootenay-Rockies (2007); Vancouver Island (2009); Thompson-Okanagan (2009); and Vancouver, Coast and Mountains (2009).

While the studies demonstrated that each region possesses unique labour market and industry characteristics, they also showed a great deal of similarity in tourism labour market conditions in all regions, including:

- The overall increasing urgency and challenges of addressing various tourism workforce issues – recruitment, retention, and training - even during relatively soft labour markets;
- Structural, long-term labour market shortages, due to population demographics, migration / settlement patterns, and other socioeconomic pressures – resulting in a need to focus on non-traditional labour supply options and young entrants;

⁶⁴ This sub-section is based on the following regional studies:

Ruth Emery, Canbritic Consultants Ltd. *Tourism Labour Market Demand: Analysis for Sea-to-Sky Region*. May 2006.

Ruth Emery, Canbritic Consultants Ltd. *Tourism Labour Market Analysis for the Kootenay Rockies Region*. June 2007.

Roslyn Kunin & Associates, Inc. (RKA). *Vancouver Island Labour Market Study: Final Report*. May 27, 2009.

RKA. *Thompson-Okanagan Labour Market Study: Final Report*. May 29, 2009.

RKA. *Vancouver Coast Mountains Tourism Region (Excluding Sea-to-Sky Corridor) Tourism Labour Market Study: Final Report*. May 29, 2009.

- Anticipated severe recruitment challenges for specific occupations, particularly cooks, hotel cleaning staff, food servers and food counter attendants, and several management positions;
- Coordination challenges in addressing the various issues across multiple tourism-related sectors, as well as a lack of regional capacity to plan, implement, and monitor sector workforce strategies; and,
- A need to enhance the use of non-monetary incentives, professional development, innovative retention tools (e.g., sustainability, health and safety promotion) to attract and retain staff in the increasingly competitive labour market.

The five regional studies also demonstrated numerous differences that require more localized solutions to address, including but not limited to:

- Worker age demographics, with the more rural regions generally having older populations, resulting in entry-level position recruitment challenges;
- Greater seasonality of operations in rural regions, often with bi-modal summer and winter peaks; and,
- Higher levels of immigration and settlement to urban areas, alleviating seasonal and overall labour market demands in urban areas while exacerbating shortages in rural locations.

The three most recent regional studies were conducted in 2009 in the three largest regions – Mainland/Southwest, Vancouver Island/Coast, and Thompson-Okanagan. In total, Roslyn Kunin & Associates, Inc. estimated job openings of 34,864, 14,790 and 9,975, respectively, during the period 2009-2015. This excludes the Sea-to-Sky and Kootenay regions which were completed in 2006 and 2007, respectively, and used different metrics.

Shortages appeared to be most acute in Cook and Chef, Food Service Attendant, and Housekeeping occupations, due to a lack of domestic supply of workers, out-migration of youth to urban centres, etc. Less acute but still identified as challenging to recruit and/or keep workers in, were Food Server, Front Desk, Guides and Sales occupations in tourism.

Generally, these regional strategies were not implemented in a comprehensive and integrated manner because of a lack of support/central agency mandated and resourced to execute at the local and regional levels. A fundamental lesson learned with these studies was the need for a more integrated approach that balances local/regional needs with centralized resources.

2011 Regional Consultations

A key element to the update of the BC TLMS was conducting consultations with tourism operators across the province to identify challenges that they were facing from a recruitment, retention and training perspective and to identify possible solutions. Over the course of three months, 11 consultations were held across all six tourism regions in BC, involving the participation of 163 mostly tourism operators and tourism industry regional organizations.

The consultations were conducted in partnership with the local community/regional destination marketing organizations and/or chamber of commerce. The consultations ranged from one to three hours in length and were held in a roundtable style format. In Northeastern BC, we also visited seven operators individually. Below is high-level summary of the themes from the regional consultations.

Recruitment

	Challenges	Solutions
Overall	<ul style="list-style-type: none"> • Poor perception of tourism jobs, not viewed as viable careers • Processes for foreign worker programs • Expectations of new graduates to start in senior positions 	<ul style="list-style-type: none"> • Increase awareness of career opportunities and link recruitment to consumer marketing • Identify motivators for youth and others to join industry • Increase awareness of opportunities with youth earlier in school • Segment approach for jobs versus careers, rural versus urban, regional, sectors • Showcase long-term career opportunities • Provide education on foreign worker programs and process
Regional Differences	<ul style="list-style-type: none"> • Availability of local labour supply (much greater challenge in rural areas) • High seasonality of operations (mostly rural) • Location and lifestyle as recruitment motivator (some areas more/less desirable) • Low wages are a disincentive to working in tourism versus collecting EI • Degree of competition with other industries • Limited infrastructure (housing, transportation, health coverage) 	<ul style="list-style-type: none"> • Focus product and marketing to address seasonality • Develop programs to share staff across operators with summer and winter operations • Partner with operators in individual regions on tailored recruitment activities • Promote unique local/regional lifestyles as benefit and opportunity • Target older workers for lifestyle and part-time work • Help identify and support solutions for infrastructure issues

Retention

	Challenges	Solutions
Overall	<ul style="list-style-type: none"> • Low value placed on good HR practices • Limited HR skills across operators (especially small businesses) • Very high turnover and lack of understanding of “normal” turnover rates/cost of turnover • Understanding how to manage multiple generations • Availability of relevant, practical HR information 	<ul style="list-style-type: none"> • Identify and communicate ROI of good HR practices • Provide training and development opportunities to employees • Develop HR tools that are relevant for small business • Help businesses benchmark and assess their turnover rates • Offer flexible work schedules • Utilize simple, cost effective tools to support retention • Help operators to develop incentives (money, training) to seasonal staff who complete season
Regional Differences	<ul style="list-style-type: none"> • Competition from other industries • Limited succession planning • Lack of career growth opportunities • Increasingly mobile workforce (also an opportunity) • Low employee engagement versus lifestyle (e.g. just want to ski) 	<ul style="list-style-type: none"> • Promote lifestyle (experience, flexibility) over compensation • Create a family atmosphere • Highlight opportunities for faster career growth vs city • Work with employees on career development • Create one-stop shop for new/seasonal workers (housing, health care, transportation)

Training & Development

	Challenges	Solutions
Overall	<ul style="list-style-type: none"> • Low value placed on formal training • Content of programs does not address key competencies (customer service, conflict resolution, supervisory skills) • Programs are too long and expensive • Training very costly, especially considering high turnover • Lack of supervisory/management training • Unrealistic expectations of new graduates • School schedule does not align with tourism season 	<ul style="list-style-type: none"> • Provide training on key competency gaps (customer service, conflict resolution, • Utilize more co-op and internship programs • Develop short training resources (e.g. videos, quick tips)
Regional Differences	<ul style="list-style-type: none"> • Lack of relevant options available locally 	<ul style="list-style-type: none"> • Establish mentoring relationships within organizations • Partner with other operations in region to approach training institutions to develop more relevant programs • Work with chamber and DMOs to increase regional knowledge

The remainder of this section provides a short summary of each consultation that primarily highlights challenges and solutions that were unique to the region.

Vancouver, Coast & Mountains

Vancouver

- Keeping up with changing regulations around foreign worker programs
- Limited understanding of the cost of turnover and the value of good HR practices
- School schedule does not align with peak summer tourism season
- Gaps between what students are learning in school and what is required by employers
- Solution – promote “a year or a career” opportunities in tourism
- Solution – create a high school task force to identify motivations to recruit youth

Whistler

- Challenges with foreign worker programs (processing time, visa extensions, prevailing wage rates, LMO refusals)
- Identifying HR practices that are relevant to small vs. large operators
- Seasonality of operations
- Lack of adequate public transportation
- Solution – provide ongoing education on foreign worker programs and processes
- Solution – partner with DMO on marketing to potential workers
- Solution – create more opportunities for co-op, internship and apprentice programs
- Solution – increase awareness of existing funding programs for training
- Lack of local labour pool in more remote locations
- High cost of living and lack of accommodation and transportation in remote regions
- Managing an increasingly multi-generational workforce
- Inability to utilize temporary foreign workers across two employers over summer/winter season
- Solution – segment recruitment efforts and adapt to the audience being recruited
- Solution – look at sharing staff across operators with summer vs. winter operations
- Solution – look at portable health care benefits for employees moving through the tourism industry

Vancouver Island

Victoria

- Lack of local labour pool in more remote locations
- High cost of living and lack of accommodation and transportation in remote regions
- Managing an increasingly multi-generational workforce
- Inability to utilize temporary foreign workers across two employers over summer/winter season
- Solution – segment recruitment efforts and adapt to the audience being recruited
- Solution – look at sharing staff across operators with summer vs. winter operations
- Solution – look at portable health care benefits for employees moving through the tourism industry

Thompson Okanagan

Sun Peaks

- Very high seasonality
- Lack of local labour pool
- Lack of affordable accommodation, high cost of living and limited transportation
- Managing an increasingly multi-generational workforce
- Lack of time to dedicate to training and development
- Solution – look at sharing staff across operators with summer vs. winter operations

Kootenay Rockies

Nelson | Cranbrook | Revelstoke

- Lack of local labour pool
- Very high seasonality with more acute labour shortages over a short summer season
- Many locals would rather collect EI than work for minimum wage
- Locals often seeking lifestyle and do not want to work full time
- Increasing competition from Northern BC and Alberta
- High unemployment rates resulting in LMO refusals
- Managing an increasingly multi-generational workforce
- Lack of infrastructure (accommodation, transportation)
- Solution – promote lifestyle to attract workers
- Solution – create partnerships with operators and local agencies to support recruitment needs
- Solution – create a local one-stop resource for new workers coming to region (domestic and foreign)

Cariboo Chilcotin Coast

108 Mile House

- Remote location and lifestyle not for everyone
- Limited local labour pool
- Locals are often not interested in seasonal work or minimum wage jobs
- Lack of affordable accommodation and transportation
- Solution – create family environment and culture
- Solution – look at sharing staff across operators with summer vs. winter operations
- Solution – support operators with accessing labour market development funding programs

Northern BC

Prince George

- Lifestyle and location not for everyone
- Increasing competition from other sectors, especially forestry
- Youth do not see long-term career opportunities in tourism
- Low awareness and use of foreign worker programs
- Limited understanding of the cost of turnover and the value of good HR practices
- Lack of relevant training courses in region
- Solution – position community as a stepping stone for career development

Dawson Creek | Fort. St. John

- Lack of local labour pool and extremely low unemployment (4.3%)
- Accommodation operators running at nearly full capacity year-round
- Aggressive competition from other sectors, including oil & gas
- Culture of very high employee turnover as there are many job opportunities available
- Managers working in long hours in high pressure environments due to labour shortages
- Lack of affordable local accommodation and public transportation very limited
- Solution – provide flexible benefits and work schedules
- Solution – mentoring long-term employees has been used successfully in many organizations

Tourism Labour Market Trends and Issues

This section describes other tourism labour market trends and issues, including analysis of the BC labour for profile and demographics, staff turnover, compensation levels, and the experiences of other jurisdictions.

To help frame the analysis of current trends and issues in the tourism workforce, go2 asked operators to identify their top recruitment, retention, and training/development challenges in its employer survey. The results were as follows:

Top Recruitment Challenges

- Finding qualified staff – 49%
- Attitude/reliability/expectations potential employees – 21%
- Ability to meet pay expectations – 20.5%

Top Retention Challenges

- Affordable compensation to retain staff – 44.6%
- Seasonality – 28.2%
- Hours/scheduling – 26.6%

Top Training & Development Challenges

- Cost of training – 42.5%
- Time to prepare for and participate in training – 41.9%

These issues are further explored in the sections below.

Labour and Skills Shortages

As indicated earlier in this report, a key labour market issue for tourism employers is current and future labour and skills shortages.

While taking a very careful approach to analyzing labour supply, the Business Council of BC recently concluded the following on labour shortages in BC:

Despite this, anecdotal reports of hiring difficulties coupled with a relatively high unemployment rate suggest that skill mismatches, geographic labour mismatches, and accelerating skill obsolescence are already affecting the provincial labour market. As a result, there is reason to believe that future skill shortages in BC may be more serious and persistent than suggested by the scenarios and forecasts summarized above.⁶⁵

While tourism labour and skills shortages are not currently as extreme as 2006-2008, tourism operators in BC still identify “finding qualified workers” as a top concern. This is expected to increase as demographic factors and economic growth converge in the coming years.

In the survey of tourism operators, 45% of respondents indicated they had one or more difficult-to-fill vacancies in the last 12 months. As Table 11 shows, 84% of these were front-line or back-of-house staff and almost 10% involved managers and supervisors. Further, 121 operators or almost 30% of respondents had a total 410 *current* difficult-to-fill vacancies as of May 2011. Again, 81% of these are front-line and back-of-house positions and 11% are managerial/supervisory positions.

⁶⁵ Business Council of BC. October 2011, op. cit., pp. 40, 43.

Table 11
Difficult to Fill Vacancies, Last 12 Months and Currently (n=121)

Occupational Category	Last 12 Months			Current		
	Number	% of Total	Average per Respondent	Number	% of Total	Average per Respondent
Front-line staff (e.g. customer service, food service, guides, reservations, lift operators, instructors, agents, etc.)	767+	41.3	6.3	162	39.5	1.3
Back of house staff (e.g. line cooks, kitchen helpers, housekeeping, engineering, maintenance, etc.)	785+	42.3	6.5	169	41.2	1.4
Administrative staff	79	4.3	0.7	14	3.4	0.1
Managers and supervisors	178	9.6	1.5	45	11.0	0.4
Executives, General Managers and Owners	24	1.3	0.2	8	2.0	0.1
Other	24	1.3	0.2	12	2.9	0.1
Total	1,857+	100.0	15.3	410	100.0	3.4

Table 12 shows the regional differences in the extent of difficult-to-fill vacancies, the reasons for these, and the impact of them. It shows that difficult-to-fill vacancies – a proxy for labour shortages – varied from a high of 54.6% of operators in Kootenay Rockies region to a low of 27.3% in the Cariboo Chilcotin Coast region. This is an important finding – the region of BC with the highest unemployment rate had the most challenges in recruiting staff, suggesting a decoupling of available labour market supply from employer needs.

The top reasons for these difficult-to-fill vacancies were compensation (inability to pay what was expected), seasonal work, lack of qualified people available, cost of living, and lack of community infrastructure. Seasonality was not an issue in the Lower Mainland but was in all other regions. A lack of community infrastructure (transportation, accommodation, community resources) was only a top issue in the Cariboo Chilcotin Coast and Kootenay Rockies regions.

Table 12

**Regional Difficult-to-Fill Vacancies, Reasons and Impacts
Tourism Operators, 2011**

Region	Had 1 or More Difficult-to-Fill Vacancies in Last 12 Months	Top 2 Reasons for Difficult-to-Fill Vacancies		Top 2 Impacts of Difficult-to-Fill Vacancies	
		Reason	%	Impact	%
Kootenay Rockies	54.6%	1. Seasonal work 2. Lack of community infrastructure	19.8 9.1	1. Had to work more hours 2. Reduced customer service	41.4 24.1
Thompson Okanagan	48.7%	1. Seasonal work 2. Cannot attract qualified people	13.5 10.9	1. Had to work more hours 2. Reduced customer service	31.3 22.4
Vancouver, Coast & Mountains	47%	1. Compensation 2. Cannot attract qualified people	14 14	1. Had to work more hours 2. Reduced customer service	32.7 24.4
Northern BC	46.2%	1. Compensation 2. Seasonal work	10.2 10.2	1. Had to work more hours 2. Reduced customer service	39.1 30.4
Vancouver Island	35.2%	1. Seasonal work 2. Cost of living	15.4 9.7	1. Had to work more hours 2. Reduced customer service and missed business opportunities	33.3 17.1
Cariboo Chilcotin Coast	27.3%	1. Seasonal work 2. Lack of community infrastructure	13.8 10.3	1. Had to work more hours 2. Reduced customer service	38.9 27.8

Source: go2 Employer Survey, 2011.

It should be noted that while it is only in the “top 2 impacts” in the Vancouver Island region, “missed business opportunities ranged from 15.5% of respondents in the Kootenay Rockies region to 22.2% in the Cariboo Chilcotin Coast region – a significant impact throughout the province.

When asked what kind of measures would help them with labour shortages, the most popular response (23%) among tourism operators was tax credits for hiring and training workers. The top 2 responses for each region were:

- Vancouver, Coast and Mountain region – Tax credits (22%) and an employment referral service (18.2%);
- Vancouver Island region – Tax credits (25.9%) and an employment referral service and assistance in developing a competitive compensation package (both 12.5%);
- Thompson Okanagan region – Tax credits (16.7%) and an employment referral service (13.6%);
- Northern BC – Tax credits (19.2%) and more relevant training in schools (19.2%)
- Cariboo Chilcotin Coast region – Tax credits and more accessible apprenticeship training (both 23.1%) and assistance with a competitive compensation package (15.4%); and,
- Kootenay Rockies region – Tax credits (25.9%) and an employment referral service (13.8%)

Juxtaposed with this, it was found at regional consultations that tourism operators had a lower awareness of government support programs including tax credits. The survey findings show that there is an opportunity to more vigorously increase employer awareness of such assistance – “did you know if you hired an apprentice, you are eligible for federal and provincial tax credits!” These findings also show that operators in a majority of regions have a degree of interest in some form of employment referral service. Lastly, the responses to this survey question also underline the regional differences and the care that is needed to not take a “cookie-cutter” approach to addressing needs

The BC Labour Market Outlook 2010-2020 suggests labour shortages will be acute in all regions except the Lower Mainland, in part because the core working age population of 25-49 years is declining – particularly in rural and remote regions of the province. In Cariboo and Northcoast/Nechako, for example, this age group has declined by 20% or more over the last 10 years. Further, as the Business Council of BC points out, “[labour market] adjustment may also be hindered by small local population bases and the preference of many people – including most immigrants –

to reside in larger urban communities.”⁶⁶ This means labour shortages and geographic mismatches may linger longer in smaller regions.

Supporting the above findings, in a more focused recent survey of 69 hotels, 49% of respondents were concerned about labour shortages in 2010/11, which increased to 78% when asked about the next five years.⁶⁷ The figures were 71% and 86%, respectively, for larger properties.

Demographics

A concern about an aging population and a smaller youth cohort in BC was a key issue in the 2003 Tourism HR Action Plan. Canada’s relatively low fertility rate is driving a smaller number of births and the pool of new entrants for tourism. While BC’s tourism workforce is relatively young, still 30% of it is 45 years and over. These demographic facts have only gotten stronger since 2003, and caused the sector to recommend tourism operators look to the following potential sources of growth for labour supply:

- Older workers
- New immigrants to Canada
- Temporary foreign workers
- Aboriginal communities
- Increasing the productivity of the labour force

The Province’s *Skills for Growth* strategy positions the importance of internationally trained workers in a global competition for talent:

“Many other jurisdictions share similar challenges with an aging workforce and increasing demand for higher skills. Migration – both international and interprovincial – of skilled workers, entrepreneurs, and students will be key to the economic future of all regions in the province...Skilled immigrant entrepreneurs will be also critical for business succession across the province, and growing new businesses for economic development and job creation.”

The BC Labour Market Scenarios Model (2010) points to forecasts that indicate 33% of job openings over the next decade will need to be filled by skilled workers from outside BC.

⁶⁶ Business Council of BC. October 2011, op. cit. p. 41.

⁶⁷ Deborah Forsyth, Ph.D. Student. *BC Hotel Survey: Labour Shortages and Recruitment*. University of Strathclyde. 2011.

The 2011 Council of the Federation meeting chaired by the Honourable Christy Clark, Premier of BC, included as a priority focus, “Increasing the Flows of People and Talent.”⁶⁸ The Council’s statement included some key tourism-relevant priorities:

- Facilitate the movement of people – this includes tourists, immigrants, international students, and business people – and capitalize on the opportunities available to Canada through globally connected Canadians and the linkages they can create between Canada and the world.
- Joint participation in selecting and setting overall levels for skilled economic immigrants is essential to ensure the success of talented newcomers and to sustain economic growth. The Provincial Nominee Program, the Federal Skilled Worker Class and the Canadian Experience Class are crucial to reaching this objective.

In light of the Government of BC’s better understanding of local labour market conditions, its focus on economic development and tourism, and other factors, this decentralization of powers and responsibility vis-à-vis immigration is strongly supported by the BC tourism industry.

Turnover

One of the major challenges of the BC tourism industry with respect to labour force availability and employment of high-caliber workers is the high rate of staff turnover. Further, reliable and updated information on tourism employee turnover has only recently been developed.

The total 2009 turnover rate in the BC tourism sector for full-time employees leaving their employers was 30.7% and the involuntary rate was 11.8% – higher than the 26.1% and 9.5% rates, respectively, seen nationally.⁶⁹ The rate was 55.3% for part-time employees and 38.4% for seasonal employees in BC.

The Accommodation and Travel Services components of BC’s tourism industry had lower than average total voluntary turnover rates of 26.8% and 21.7%, respectively; while Food and Beverage Services (36.8%) and Recreation and Entertainment (42.2%) has higher than average voluntary turnover.

For voluntary turnover, the top reason for part-time and seasonal employees was “returned to school” (35.7% and 56.9%, respectively); and for full-time tourism

⁶⁸ *Canada in the Global Economy: A Strategy to Harness the Strengths of Provinces and Territories and Help Canada Better Compete in the Global Economy*. The Council of the Federation. July 2011.

⁶⁹ Hay Group. *2010 Canadian Tourism Sector Compensation Study*. Prepared for the Canadian Tourism Human Resource Council. March 2011. “Voluntary” turnover is defined as an employee terminating an employment contract, with “involuntary” turnover relating to employers terminating an employment contract with employees. Overall, voluntary employment is the main category that businesses attempt to influence through good HR practices.

employees in BC it was “higher pay from another business”, with “returned to school” being a reason for only 20.6% of such employees.

From discussions with tourism operators, the key is “bad” turnover – losing good employees in core or critical occupations. A certain amount of turnover is desirable, especially in seasonal operations. Regardless of good or bad, a start would be for operators to measure and benchmark turnover against an industry standard, and this is now being undertaken.

After conducting research in conjunction with its 2010 compensation survey, the CTHRC and Conference Board identified key drivers of turnover, attraction and retention:⁷⁰

- Having competitive pay;
- Encouraging employee innovation;
- Engagement in corporate social responsibility initiatives;
- Fostering a collaborative working environment;
- Having staff performance management systems in place.

When tourism operators were asked in the TLMS employer survey, which incentives/supports does your organization find to be the most effective for retention (i.e. reducing turnover), the most frequent responses were:

1. Flexible work schedules (23.8%);
2. Training (15.3%);
3. Special benefits (13%); and,
4. Professional development (12.7%).

In light of the above, it may be surprising that 90% of employees surveyed by go2 indicated an interest in continuing to work in the sector in the next five years. When employees were asked what they liked best, they said: working with people (69.9%); fun working environment (66.0%); flexibility (44.8%); and supportive management (44.0%). When asked what they liked the least, they said: low competitive pay (50.0%); limited training opportunities (28.5%); poor benefits and perks (27.7%); and no opportunity for career development (26.8%). Compensation was not the only or main factor – professional development and career advancement were seen as key, as well of quality of the working environment and other benefits.

⁷⁰ Hay Group, op. cit.

Compensation⁷¹

Worker compensation has been identified as a factor in the attractiveness of tourism jobs and in retention and turnover issues.

In March 2011, the CTHRC released the results of its third compensation study (for 2010), undertaken with the assistance of provincial/territorial HR Organizations and other tourism associations by the Hay Group. The two earlier studies were for 2005 and 2008.

The 2010 study showed an overall increase in salaries and wages when compared to 2008. Hourly occupations had a greater average increase of 8.3% compared to salaried jobs at 5.5%. Food counter attendants and kitchen helpers showed the highest hourly increase at 14.2% and executive chef's average salaries increased the highest at 10%.

There was a tendency for the food & beverage services sector to pay below the median level for all tourism jobs. This was consistent for all employee levels and full and part-time employees. Workers in the accommodation sector tended to pay higher wages for the same jobs in food & beverage services. The CTHRC report suggested this may be due to high levels of unionization in accommodation and the fact that food & beverage services businesses are mostly small independent establishments.

In BC, there were mixed patterns of salary increases and decreases in 2010 over 2008 in terms of occupational averages:

- Accommodations service manager – Decreased from \$45,000 annual total cash to \$42,750;
- Director of sales and marketing – Increased from \$66,500 to \$72,250;
- General manager – Decreased from \$72,650 to \$67,500;
- Travel counselor – Increased from \$35,500 to \$43,500; and,
- Many others remained the same if decreased or increased very slightly.

In terms of wages, there was a similar mixed pattern:

- Executive chef – Increased from \$22.19 hourly total cash to \$24.00 in 2010;
- Food & beverage server supervisor – Decreased from \$14.57 to \$14.00;
- Host/hostess – Decreased from \$10.46 to \$10.20;
- Housekeeping room attendant – Increased from \$12.20 to \$12.50;

⁷¹ Facts in this section are from: Hay Group. *2010 Canadian Tourism Sector Compensation Study*. Prepared for the CTHRC. March 2011.

- Landscaping grounds maintenance labourer – Increased from \$13.05 to \$14.00;
- Sous chef – Decreased from \$17.60 to \$17.00.r

Food & beverage services workers received the highest levels of gratuities, with bartenders and food & beverage servers receiving the most and housekeeping room attendants and cooks receiving the least. The most frequent gratuity level was 15% or less of a worker's base salary/wage. Approximately two-thirds of businesses with staff receiving gratuities have some type of gratuity splitting policy in place.

Bonuses continued to be an important incentive for employees across the tourism sector. They were much more prevalent at the supervisory and management levels. As the CTHRC points out, "...flexibility in compensation is crucial since businesses are hyper-exposed to the volatility of the economy and other factors that affect revenue and profitability."⁷²

The 2011 study indicates that more organizations offered benefits in 2010 than in previous periods. Health and dental, short and long-term disability and employee life insurance programs were the most prevalent; and the proportion of businesses offered employee perquisites and special programs increased since the 2008 study.

The top 5 types of benefits, perquisites and work arrangements offered by companies in BC were:

1. Training and development – 87%
2. Employee discounts/free services – 85%
3. Health/dental insurance – 83%
4. Employee life insurance – 75%
5. Long term disability – 72%

The compensation increases seen in the study are consistent with the CTHRC data on attraction and retention, which showed key HR programs used by tourism employers included ensuring compensation packages are competitive against the market.

Tourism Awareness and Attraction

Awareness Among Job-Seekers

A lack of awareness of and interest in tourism careers was a key issue identified in the 2003 Action Plan and continues to be an ongoing issue for the industry. While go2 and others have put much energy and resources into turning this around, this still needs to be a centre of attention by the tourism industry.

⁷² Ibid. p. ii (Executive Summary).

An annual omnibus survey conducted for go2 by the Mustel Group shows little improvement in perception of the BC tourism industry among youth and other age groups. Since the first survey was undertaken in 2005, scores for the perception of tourism career opportunities have been generally fair to middling (averaging six to seven on a ten-point scale).

The one area where perceptions are somewhat better is with youth. In 2011, the proportion of 16 to 24 year olds answered “yes” to whether they “plan to consider tourism as a job or career choice,” more than doubled from 13% in 2010 to 27% this year – the highest recorded since tracking began in 2005.⁷³ While this is likely somewhat due to the 2010 Olympic Games, it also potentially reflects the extensive career awareness activities of the industry targeting youth.

Employee Engagement

In addition to its employer survey, go2 conducted a survey of tourism employees in BC in September/October 2011 and received responses from 411 individuals. The profile of the respondents was as follows:

- 84% are currently working in tourism in BC;
- Almost 60% have worked in the industry for three years or more, and 22% for 10 years or more;
- 41% are working in Food and Beverage Services, and 23% in Accommodation;
- 51% of the respondents are front-line employees, while 22% are managers or supervisors;
- Two-thirds of those who responded are women;
- 29% are 24 years old or younger, and 59% are 25 to 49 years old; and,
- Almost two-thirds of employees who responded were born in Canada.

When asked how they heard about tourism jobs in BC, 69% indicated an online job board, while 48%, 31% and 29% indicated word-of-mouth, a newspaper, and social media, respectively, were the next most frequent means. When asked about what websites they have used in the past for searching tourism jobs, the go2 Job Board drew a 69% response. Craigslist at 62% and Monster/Workopolis were the next most frequent at 62% and 37%, respectively.

The employee survey results become more revealing when respondents are asked about what attracts them to tourism and what they like and dislike about the industry. The most frequent responses were similar when asked about what

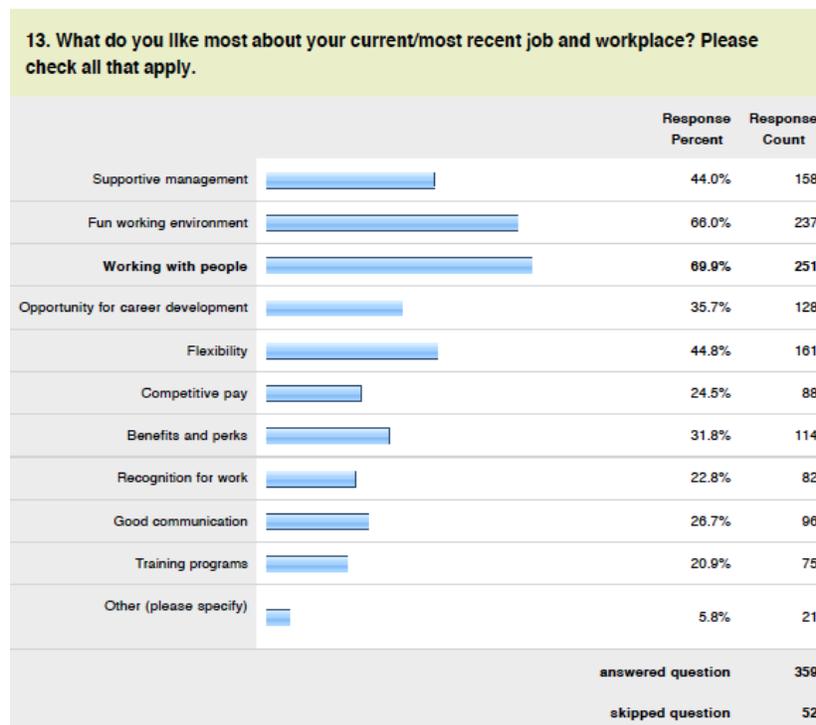
⁷³ Mustel Group Market Research. *Careers in Tourism – 2011 Tracking Province Wide Omnibus Survey Results*. Prepared for go2. April 2011.

attracted them to the industry and what they like most about their current or most recent job and workplace in tourism.

When asked what attracted them to the industry, it was not all about the money. About three-quarters of employees indicated working with people and a fun working environment were the top factors that attracted them to the industry. A flexible work schedule (47%), career development opportunity (45%), and benefits and perks (33%) were the next top features that attracted them. Interestingly, competitive pay (19%) was relatively low on the list.

As Chart 6 shows, the top features that employees liked most about their current or most recent tourism job were similar. Seventy percent and 66% said working with people and a fun working environment, respectively, were the top two, while flexibility (45%), supportive management (44%) and career development opportunities ((36%) were the next highest. Again, wages/salary was a relatively lower motivator, seventh on the list at 25% of those surveyed.

Chart 6
Employee Survey



Source: go2 Employee Online Survey. 2011.

When asked what they disliked most about their current or most recent tourism job, 50% said low competitive pay, followed by limited training opportunities (29%), poor benefits and perks (28%), and lack of career development opportunities (27%).

As mentioned earlier, the survey yielded a highly positive response from 90% of the employees who indicated that they plan to continue working in the tourism industry.

Of the small number who responded negatively to this question, the main reason (43%) was “compensation is insufficient to meet my needs.”

Work-Related Education and Training Needs

Tourism operators and employees indicated, through the project Working Groups, the employer survey and other forums, that they need access to flexibly structured and delivered skills training. In addition to cost (33% of employer survey respondents), releasing employees to participate in training is a key barrier to training (29%). Training needs to be flexibly scheduled (i.e. part-time), in small chunks or modules, workplace-based, and delivered in different formats (face-to-face, online, distance, etc.). Tourism operators also need help in wading through a plethora of training programs to assess what is best for their needs. Further, another barrier found in the employer survey was that needed training was not always available locally (14.5% of operators).

When asked what education and training suppliers could do to enhance their delivery for tourism operators, the top 4 responses were:

- Flexible scheduling (16.5%);
- Workplace-based delivery (16.1%);
- Online/videoconferencing formats (14.1%); and,
- Shorter duration programs (13.1%).

These preferences were reinforced at TLMS regional consultation sessions throughout the province.

In the survey of tourism employees, when asked about what they disliked most about their current/recent tourism job, 29% cited limited training opportunities and 27% pointed to a lack of career development opportunities.

In the same survey, the most frequent type of training received by employees in their current/most recent company, 61% cited orientation training, followed by people skills/customer service (35%) and specific technical or professional skills training (32%).

When asked what kind of training or education would help them in their current/most recent tourism job, respondents identified several types of training. Of 216 respondents, they cited the following (percentage of total):

- Management and supervisory training – 10.6%
- Sales and/or marketing – 10.2%
- Specific technical or professional skills training – 10.2%
- Wine-related or bartender training – 6.5%
- Customer service training – 5.6%
- Health and safety training – 4.2%
- Computer, financial, and conflict resolution training – each 3.7%
- Language or culture training – 3.2%

Industry recognition and credentialing of acquired skills – particularly short-term, skill set-based training – is an important part of the tourism industry. An example of this that has become an international success story is the *SuperHost*[®] Program delivered by *WorldHost*[®] Training Services. While introduced to prepare British Columbians to host the world for Expo '86, close to 1 million people have been trained around the world. As a *WorldHost*[®] fact sheet states, "It costs 5 times as much to attract a new customer as it does to keep an existing customer."⁷⁴

Human Resource Practices and Productivity

Researchers at the University of Guelph School of Business have recently emphasized that "in order to remain competitive, firms in tourism industries must focus on increasing productivity" and that "Human Resource Management (HRM) can play a pivotal role in improving individual productivity and subsequent organizational effectiveness."⁷⁵

Further, in its 2010 compensation study of the Canadian tourism sector, the CTHRC found the highest level of investment in human resource management practices in:⁷⁶

1. Treating all employees fairly (3.5 out of 4);
2. Training employees to deliver high quality customer service (3.38);
3. Making sure employees have the right tools and training to do the job (3.37).

Conversely, the three human resource practices with the lowest levels of investment in the CTHRC research were:

1. Allowing flexible work hours (2.89 out of 4);
2. Evaluating managers on how they treat their employees (2.93); and
3. Using tests and/or structured interviews to hire the best performing employees (2.97).

⁷⁴ *WorldHost*[®]. *World-Class Customer Service Training: Fact Sheet*. Ministry of Jobs, Tourism and Innovation. 2011.

⁷⁵ J. Brown, S. Elliott, J. Christensen-Hughes, S. Lyons, S. Mann and A. Zdaniuk. *Using Human Resource Management (HRM) Practices to Improve Productivity in the Canadian Tourism Sector*. University of Guelph and Canadian Tourism Human Resource Council. March 2009, p. 1.

⁷⁶ Hay Group, op. cit.

The University of Guelph researchers found a relationship between effective human resource practices and tourism productivity, and make recommendations to tourism organizations. The recommendations are premised on the importance of “organizational citizenship behaviors (OCBs), defined as “individual behavior that is discretionary, not directly or explicitly recognized by the formal recognition system, and that in the aggregate promotes the effective functioning of the organization.”⁷⁷ Examples of their recommendations include the following:

- Organizations in the tourism sector should focus on collecting measures of employee performance from customers..
- To improve individual productivity and organizational effectiveness, organizations should not only look at task performance, but also value and encourage their employees to exhibit high levels OCBs.
- Tourism organizations should effectively implement universal, high performance, HRM practices such as training and development, contingent pay and reward schemes, performance management (including appraisal), team-working, etc.. These organizations will have higher levels of productivity than those that do not.
- Organizations should measure employee engagement levels on an ongoing basis and should determine the organization-specific drivers of engagement.

In light of the BC government’s focus on supporting productivity enhancement in the BC economy, further work should be undertaken to formally evaluate opportunities in this area.

The International Context

To better understand the context and perspective of the issues and metrics previously mentioned, a scan of leading tourism jurisdictions around the world was undertaken.

The World Economic Forum’s *Travel & Tourism Competitiveness Index* rates Canada relatively strong in some education indicators.⁷⁸ For example, it is 5th in “quality of educational system.” However, the Index shows some weaknesses in other tourism competitiveness indicators such as secondary education enrollment (22nd), extent of staff training (12th), hiring and firing practice (16th), and ease of hiring foreign labour (75th). This latter statistics on hiring foreign labour is particularly problematic in a society that will increasingly need to rely on immigration and temporary foreign worker programs to meet population and labour market demand.

⁷⁷ Ibid.

⁷⁸World Economic Forum. *The Travel & Tourism Competitiveness Report 2011: Beyond the Downturn*. Geneva, Switzerland. 2011.

There are some important lessons and effective practices to learn from tourism in other countries.

For example, Tom Baum (2007) conducted a comprehensive review of tourism HR trends and practices in dozens of advanced industrial economies. The key challenges and trends were:⁷⁹

- Perceptions of work as low-paid, degrading;
- Short-term labour needs (e.g., use of foreign workers versus investments in training and productivity);
- Lack of recognition of the return on investment of good HR practices;
- Training needs that are difficult to address through traditional delivery mechanisms and institutions; and,
- The importance of (and lack of) integration of HR in business planning at corporate and sector levels.

In reviewing tourism workforce strategies in Australia, the European Union, Ireland, New Zealand, select U.S. states, Ontario and Alberta, a few of the key themes are:

- Enhanced adoption of “high performance” work practices (see below);
- The importance of and need for enhanced linkages between sectors and regions;
- Tools to help operators improve workplace innovation and labour productivity;
- Flexible delivery of training;
- Emphasis on customer service training as part of raising the quality of service standards;
- Emphasizing good HR practice in supervisory and management training and development.

These themes are complemented by similar findings from research and what go2 has heard from tourism operators and others during the development of this strategy. As summarized in Table 13, in a comprehensive review of international literature, Failte Ireland (the Irish Tourism agency) identified 8 recurring themes in good HR practice to guide their sector.⁸⁰

⁷⁹Tom Baum. “Human Resources in Tourism: Still Waiting for Change.” *Tourism Management*. 28, 2007, 1383-1399.

⁸⁰Failte Ireland. *Competing Through People: A Human Resource Development Strategy for Irish Tourism, 2005-2010*.

Table 13
Human Resource Principles from International Lessons

Flexibility	As evidenced in a preparedness on the part of the enterprise to match their demands on staff time as far as possible with the available supply of time from workers, and to recognize the work-life balance that must be managed in contemporary society.
Participation	As evidenced in a preparedness to encourage staff to be involved in local decision-making and to exercise some influence of their working day.
Performance Management	As evidenced in regular systems of performance review to ensure that individual and team performance is delivering the service standard and business results expected of it.
Recognition	As evidenced in the attribution of credit to high-achievers within the peer group, and the celebration of the achievements of high-performing individuals and teams.
Reward	As evidenced in payments (both monetary and non-monetary) that are linked to performance, and that are clearly understood by staff to track the profitability of the enterprise.
Communication	As evidenced in routine dialogue with staff, in the openness and accessibility of management, and in regular feedback loops and follow-through actions.
Learning and Development	As evidenced in ready access to on-site learning opportunities, support for learning progression through attendance at off-site courses, and a continuous emphasis on on-site team development.
Empowerment	As evidenced in the active support and guidance of staff so as to enable them to participate in the workplace in the manner described above.

4. Human Resource Challenges

After hearing from almost 1,000 individuals and groups during the development of this strategy through various mechanisms (e.g. surveys, working groups, regional consultations, etc.) and reviewing numerous pieces of literature and data, a number of fundamental human resource challenges for the BC tourism industry and individual operators have been identified.

Attraction and Recruitment

Competition for people from other industries and jurisdictions. Whether it is Alberta employers for the Northeast and Kootenay Rockies regions or other sectors in larger urban areas of BC, the war for talent is on. Employers from other sectors, provinces and countries are actively trying to attract and recruit existing and potential tourism employees. Not only do BC tourism operators have to be proactive, they have to create and promote competitive advantages – be employers of choice.

Changing demographics, particularly attrition from an aging workforce and a declining proportion of young people. These are demographic facts supported by data already mentioned in this Action Plan and elsewhere. The youth cohort is important to the tourism industry – operators will have to work harder to continue recruiting from this pool as well as rely more on other talent pools.

A lack of awareness of, and perceptions of tourism jobs as entry level and low-paying. The first step is awareness – tourism and hospitality jobs are often not on the radar-screen of young people and their influencers; and if they are, there are often negative impressions and stereotypes about tourism work. In cases where the work actually is low-paying and entry-level, other aspects of tourism and career development need to be emphasized.

Labour and Skill Shortages. Generally, in the BC labour market, recent evidence by TLMS labour market projections, the BC Labour Market Outlook 2010-2020 and the Business Council of BC analysis, all point to a future of labour shortages – sometimes region or sector-specific and sometimes more widespread. With regard to the BC tourism industry, evidence from the research by Roslyn Kunin & Associates for this Action Plan, as well as data from the employer survey and anecdotal information from tourism operators throughout BC all lead to a reasonable expectation of significant job openings (from economic growth and attrition/retirement) and labour shortages. While existing labour shortages may be sector, occupation, or region-specific today, it is expected that shortages will become more widespread as we move into the middle of this decade.

Retention

A lack of awareness of - and lack of perceived value and return on investment of - good HR practices among tourism operators. While part of the challenge is the capacity of (particularly) small and medium-sized operators to use effective HR practices, sometimes the barriers are a lack of awareness of measures that even small operators can implement, and being convinced that there is a real, practical business case for using such practices.

Training & Development Challenges

Lack of access and flexible programming for tourism operators, particularly small operators and those in rural areas. This challenge has been reflected widely in research and within working groups and regional consultation sessions. Closer-to-work, smaller “chunks” of learning, use of modules, and – when appropriate – making greater use of technology (online, videoconference) for training tourism employees are all needed.

Lack of investment in relevant training for supervisors and managers, including strengthening HR skills. Research and consultations show a concern about the lack of effective management and supervisory skills in the tourism industry, particularly those new to such roles, as well as line supervisors without strong HR skills and knowledge. Also, experienced managers and supervisors need training to build more sophisticated skill sets in line with current best practices.

Lack of linkages and communications between industry (operators) and the education and training system to enhance program relevance. This was a challenge in the 2003 Action Plan and remains fundamental. This includes enhancing business operator engagement with training providers to ensure relevant training is available. It also includes ensuring engagement between industry representatives and the training system. The challenge also includes that this dialogue, communication and coordination must be driven from an industry perspective and needs.

Information

Tracking system-wide performance in key areas without a consistent and agreed-upon set of relevant performance measures and regularly collected data, including:

- Ensuring research and data tracking is useful
- Lack of a framework for consistent Action Plan tracking and updating across regions, sectors, and over time
- Lack of agreement on definitions and performance measures, due to the diversity of stakeholders (i.e. urban/rural, operators/ employees, etc.)

The 2003 Action Plan contained some general performance measures but some of these were not tracked in a rigorous and integrated way. In order to monitor and report on the success of the updated Action Plan, specific performance measures and indicators are necessary, as well as agreement by stakeholders and businesses to track similar measures.

Inadequate tourism operator access to, and use of timely information on labour market and HR trends and programs and resources. Tourism operators often have neither the time nor ability to access useful labour market and HR information. Further, much of the information is not tailored to operators' needs (not regional/local enough, difficult to interpret).

Strategy Leadership and Coordination

Highly diverse industry resulting in strategic coordination challenges. Many organizations have an interest in the implementation of the tourism labour market strategy: regional groups including regional and community DMOs, sector associations, training and other service providers, government agencies, individual tourism operators and employees, and others. The strategy cannot simply be centrally managed and implemented without the active engagement of key stakeholders

Inability to directly control or influence key areas affecting tourism HR strategy effectiveness. The overall success or parts of the updated TLMS can be jeopardized by unexpected economic (e.g. recession), natural (e.g. tsunamis) and public policy (e.g. changes in immigration policy) factors. This underlines the need for contingency/scenario planning and having a nimble approach to adjusting strategies and tactics.

Limited local infrastructure and services for operators and workers.

Particularly in rural and small communities, there is much evidence that inadequate transportation, employee accommodation, child care services, and community recreational and social services are barriers to recruiting, retaining and training tourism workers.

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APPENDIX A:

2003 – 2011 BC Tourism HR Action Plan Progress Report

May 13, 2011

In the fall of 2001 – faced with a looming shortage of skilled labour – 28 CEOs, general managers, human resource directors, industry association leaders and tourism educators formed a task force to lead the Recruit, Retain & Train: Developing a Super, Natural Tourism Workforce in British Columbia strategy project.

More than 100 industry representatives participated through several working groups, ensuring that task force members considered diverse, industry-wide perspectives regarding tourism's workforce needs. Working from October 2001 to April 2003, the task force developed a 5-year plan and established a coordinating organization and industry governance structure.

The following document outlines the action items identified by the task force action plan and go2's high-level progress to date on each initiative. It also includes other initiatives that the organization has undertaken based on industry need and unforeseen industry developments related to human resource development.

In some cases, action items recommended by the Task Force were not completed by go2. In these instances, the action items were evaluated and determined not feasible for the organization to undertake and these are noted in the following document.

I. Recruiting Workers

Bring more adults into the tourism workforce

- Conducting career awareness presentations at career centres where many of the participants are adult job seekers/career changers looking for a new direction.
- A section was created on the go2hr.ca website under the "For Employers" section called "Mature Workers" encouraging employers to consider actively targeting this labour pool. Along with information to help employers attract and retain this group, the section includes articles featuring older workers who have built successful careers in the tourism industry.
- Attended government sponsored recruitment fairs in southern Ontario during BC's labour shortages of 2006-2008. go2 gathered several hundred resumes for BC employers and many of the applicants at these job fairs were adult job seekers looking to relocate to BC.
- Participation on the Minister's Council on Employment for Persons with Disabilities to look at ways the tourism industry can work together with this group with the ultimate goal of getting more persons with disabilities working in our industry.

Implement specific initiatives to match immigrants to tourism jobs

- Several sections have been created on the go2hr.ca website with information for both job seekers and employers relevant to this action item. Under the "Career Awareness" section there is a webpage titled "Tips for New Immigrants" that includes links, tips and also highlights success stories of immigrants who have successfully gained employment in the tourism field. A section located under "For Employers" provides resources and articles for employers with tips on attracting this labour pool.

- Working with S.U.C.C.E.S.S. and other new immigrant groups, go2 conducts career awareness presentations and through these presentations meets and assists a number of new Canadians to find jobs in the tourism industry.
- In July of 2006, just as labour shortages were becoming a major challenge for the industry, go2 spearheaded a foreign worker forum that brought together industry stakeholders, government and representatives from other sectors to encourage collaboration on strategies on this key issue. This ultimately led to a partnership between go2 and the BC Construction Association working together to promote employment opportunities for families during the extreme labour shortages in 2007 and 2008.
- A Foreign Worker Guide was created to help employers understand and successfully navigate the many different foreign worker programs available. To date, over 1,500 copies of the Foreign Worker Guide have been downloaded since it was created in 2007.
- Conducted and coordinated a number of roundtables and presentations on foreign worker recruitment to employers throughout the province.
- Influencing foreign worker programs and legislation by acting as liaison between industry and government with a focus on enhancing effectiveness and uptake of the Temporary Foreign Worker Program, the Provincial Nominee Program, and student/youth foreign worker programs.
- Starting in 2007, go2 has attended 'Destination Canada' recruitment fairs in France, Belgium and Germany. Working in partnership with the BC Provincial Nominee Program (PNP) and the federal government the goal is to attract youth job seekers, and build additional international recruitment contacts. Representing a number of BC tourism employers at each fair, go2 representatives met with and gathered hundreds of resumes to connect international job seekers to BC employers.
- In 2008 go2 attended the World Youth and Student Travel Conference to gain a better understanding this complex segment and to make connections with organizations involved in the youth work and travel market. This resulted in the implementation of a pilot project with BUNAC, a UK market leader in work abroad programs, focused on attracting seasonal workers for the ski industry. Additionally, a partnership with the Student Work Abroad Program (SWAP) has been instrumental in helping employers to fill jobs especially during the 2010 Winter Olympic and Paralympic Games.
- A Facebook page "Work, Live, Play BC" was created specifically to target international job seekers with a goal to promote career awareness and to connect BC employers with potential employees. The page currently has 339 fans.

Increase marketing efforts to the general public

- In 2006 go2 launched the Move On Up™ brand and a multi-year campaign reaching out to youth and under-represented labour groups to promote careers in tourism and dispel myths about working in the industry. Supported by the provincial government, industry and the educational community the campaign tactics include tourism career awareness presentations (TCAP) in high schools and career centres, advertising (radio and print), career fairs, Moveonup.ca website and e-newsletter, Facebook pages, Twitter feed, contests and public relations activities.

- To date, go2 has conducted over 450 tourism career awareness sessions in BC high schools, reaching more than 12,000 students. Over 160 tourism career awareness sessions reaching 3,200 people were presented at career centres, with a focus on aboriginals, new immigrants, persons with disabilities, and other under-represented groups.
- An active bureau of industry volunteer speakers is engaged to conduct tourism career awareness presentations (TCAP) in high schools and career centres. Currently, there are 70 speakers from industry located in a number of communities across the province who volunteer their time to promote careers in tourism.
- A partnership was developed with White Spot to sponsor the tourism career awareness program (White Spot provides restaurant coupons used as prizes for the interactive trivia contest that is part of the tourism career awareness presentations).
- An e-newsletter for career seekers includes career success stories, job fairs, events and selected jobs from go2's job board. It reaches more than 22,000 subscribers monthly.
- Two Facebook pages were created promoting BC tourism job and career opportunities. The Move on Up page is targeted to Canadians and to date has 1,184 fans. The Work, Live, Play BC page is targeted to international job seekers and has 339 fans.
- Two Twitter accounts were launched including a general go2hr account (1,171 followers) and the go2 job board feed (1,351 followers).

Compile and provide more information on compensation for tourism jobs

- Starting in 2004 go2 worked with the HayGroup, one of Canada's leading professional services firms specializing in people and performance, to produce a British Columbia Tourism Industry Compensation Study. Based on initial success, the study grew to include the western provinces and today, working with the Canadian Tourism Human Resource Council, it has evolved into a national study that provides in-depth compensation and benefits information that is available to tourism employers at no cost.

Revise "A Career in Tourism: Getting Started" poster and information handout

- Working with educational partners, the original poster was revised in 2005 and distributed to schools and career centres. Career awareness brochures and the Moveonup.ca website also provide information about getting started in the industry. With the emergence of social media and a focus on digital communication, the poster has now been replaced with other more current communication channels.

Expand career awareness activities beyond secondary school students

- Working in collaboration with LinkBC, the tourism and hospitality education network for BC, go2 has participated in a number of initiatives designed to reach post-secondary students including student-industry rendezvous events, student competitions, awareness campaigns promoting graduate skills, career path guidance and other support for students as they transition to industry.
- A handbook was developed with input from students, the educational community, employers and go2 entitled *The Orange Book of Success: A Freshly Squeezed Career Planning Guide for BC Tourism/Hospitality Students*. This book features information on education, training, career planning, networking, job hunting, attitude and commitment and it is distributed to post-secondary students in their first year.
- Working with LinkBC and the Aboriginal Tourism Association of BC, a joint brochure was published in 2011 to promote tourism career paths and education opportunities. The piece will be used by all organizations to cross-promote all three organization's programs and services.

Maintain a strong tourism presence at semi-annual job recruitment and career awareness fairs

- go2 exhibits annually at the Education and Career Fairs every year in Vancouver, Fraser Valley, Vancouver Island, Kelowna and now Kamloops reaching over 15,000 youth since 2006.
- Partnerships with sector associations including snowsports, golf, culinary, accommodations and attractions have helped to more effectively promote careers in the highlighted sector by connecting industry employers to potential future employees.

Invest in teacher education, especially for those delivering career preparation courses

- Supported the Canadian Academy of Travel & Tourism (CATT) initiatives and promoted it to high schools. In 2007, a direct marketing promotion went out to 168 high schools across BC to encourage high schools to become 'CATT' Level 1 schools and a number of schools signed up in response to the marketing efforts.

Develop a tourism HR gateway web site that will provide job seekers quick and easy access to industry information, company-specific job postings and pertinent training programs

- In 2005, the existing go2hr.ca portal website was redeveloped including the career awareness section which was redesigned to reflect the Move On Up branding. In 2011 the career awareness section of the website saw close to 155,000 visitors and it continues to grow every year.
- A niche tourism job board on the go2 website enables BC tourism employers to post jobs at no cost and job seekers to search for jobs. This is one of the most visited areas on the website and it receives an average of 22,000 visits per month. Since 2004, over 8,000 jobs have been posted by 2,200 different companies.

II. Retaining Workers:

Support operators of tourism businesses with best practices information and tools for human resource management – especially small to medium-sized businesses that may not have HR knowledge or skills in-house. Offer the following support:

“Welcome wagon” tips and resource contacts to help new businesses get off to the right start with employees

- This initiative was researched, but it was found to be not feasible to pursue.

Regular e-bulletins with HR tips for tourism operators

- A bi-monthly e-newsletter containing newsworthy items, events and the latest website articles, BC success stories and other HR best practice articles is distributed to more than 7,000 recipients.

Online information (clearinghouse) of relevant HR resources

- The “For Employers” section of go2’s website includes content on recruitment, retention, managing staff, training, health & safety, legal, BC success stories and more. New content is also added on a regular basis, and this section of the website received over 121,000 visits in 2011.
- Working together with Tourism BC The Employees First Guide - The Essential Human Resource Guide for Tourism Operators was produced as part of the popular Tourism Essentials series. The guide provides essential information on how to attract, retain and develop an effective workforce with easy-to-use templates. It was updated in 2011 and can now be downloaded at no cost.
- A corporate Twitter feed (1,171 followers) was implemented and used to disseminate HR (and other relevant industry information). It also serves to drive employers to the go2hr.a website.

“Best practices” roundtables organized in various regions of the province

- Roundtables and presentations are conducted on a regular basis throughout the province on a wide variety of HR topics. Since 2004, go2 has conducted more than 150 presentations reaching over 9,000 people.

Short (one-half to one-day) management skills-building workshops

- This initiative was not pursued.

Peer referrals to HR professionals who can provide expert support on an as-needed basis to individual businesses

- An online supplier marketplace was implemented on the go2hr.ca website, but after several years it was found to be administratively not feasible to upkeep and to get new advertisers. However, upon request go2 refers employers to appropriate HR suppliers on a regular basis.

Other initiatives undertaken:

- Working in partnership with WorkSafeBC, go2 was designated as the health and safety resource and the certifying partner for the Certificate of Recognition (COR) Program for BC's tourism and hospitality industry in 2008. In addition to providing resources on reducing injuries and improving workplace safety, a key component of the agreement includes implementing and administering a Partners in Injury and Disability Prevention Program for industry employers. To date, 16 tourism and hospitality businesses registered for the COR program – with a target to reach 30 by end of 2011/12 fiscal year. Six businesses became COR-certified in 2011.

Conduct employer research to identify the benefits of changes in HR policies and practices

- Bi-annual analysis of tourism and hospitality compensation levels (see more information under Recruitment, item #4 above).
- Starting in 2006, labour market studies were undertaken in the Whistler/Sea-to-Sky, Kootenay Rockies, Vancouver Island, Thompson Okanagan and Vancouver Coast and Mountains regions. The purpose of the research was to examine the employment level and human resource requirements for the tourism industry so each region would have the information needed to plan for the future.
- Since 2007, go2 has conducted a survey of Canada West Ski Area Association members that covers 34 common occupations with a goal to determine the effects that the tight labour market is having on their ability to recruit qualified staff.
- A number of research projects were initiated to assist employers to prepare for the many unique human resource challenges before, during and after the 2010 Winter Olympic and Paralympic Games. A section of the go2hr.ca website was also created to share this information with future Olympic Games organizers.
 - A pre-Games survey was conducted in the Lower Mainland and Sea-to-Sky areas to gauge employers' staffing challenges prior to the Olympic and Paralympic Games.
 - Working in partnership with the Whistler Chamber of Commerce, a focus group was conducted with Whistler employers to further explore the issues and understand the challenges.
 - Post-Games surveys were conducted across BC to identify staffing issues that arose during the Games.

Continue to identify and work with tourism employers in BC who are seen by their competitors and by employees as “best practices employers”

- Highlight and reward industry best practices in HR management through sponsorship and judging of the annual “Employees First” Award at the Tourism Industry Conference.
- Publishing BC Success Stories highlighting employers of choice by sharing stories at conferences, through industry publications, the website and other methods.

III. Training & Development

- Working with the Industry Training Authority, go2 is the Industry Training Organization for BC’s tourism, hospitality and foodservices sector and is responsible for the management of the Cook, Baker, Meatcutter and Tidal Angling Guide trades with the mandate to evaluate the need for new trades in the sector. Following are some major milestones achieved in this program area to date:
 - Conducted an extensive consultation with industry on industry training needs
 - Conducted a major overhaul of cook program standards in 2008, including new program model and practical evaluation
 - Reviewed program standards for baker program in 2008/2009
 - Reviewed program standards for meatcutter in 2008/2009
 - Participated in a new form of standards development (occupational performance standards) in 2008/2009
 - Supported the development of new assessment methodology for challenge candidates (MAP) 2008 – 2010
 - go2 and the Sport Fishing Institute (SFI) of BC worked together to launch a new Tidal Angling Guide (TAG) certification program in 2009/10.
- Participated in the Tourism and Hospitality Training and Education Consortium with a goal to reform the publicly funded training and education model to make it more flexible, responsive, relevant and integrated.
- go2 is the BC partner for the Canadian Tourism Human Resource Council, the national tourism sector council and has been instrumental in evolving the mandate of the national council to include key programs related to national compensation studies, national labour market studies, and foreign worker programs.
- Participated in 33 standards development projects since 2006.

Create one common system to recognize tourism-related skills from “entry” to “mastery” level

- Achieved this for the Professional Cook trade through the implementation of a three-tiered training program for Professional Cook 1 (PC1), PC2 and PC3 (Red Seal).

Maintain and promote an online inventory of all tourism training programs

- A searchable online Tourism Training Directory is available on the go2hr.ca website with a comprehensive list of public and private training options in BC.

Embed employability skills in the secondary school tourism curriculum

- A common curriculum is now available and it includes employability skills as a part of the overall program.

The following Training and Development action items were assessed and not pursued by go2, but may have been driven by other stakeholders:

- Emphasize entrepreneurial, business and people management skills – as well as core customer service skills – in all tourism programs.
- Deliver learning resources in smaller, faster-to-complete modules to support part-time students.
- Support more investment in supervisory skills training
- Ensure a work-experience component in all secondary school and post-secondary diploma or degree tourism programs
- Develop and promote the widespread use of a common evaluation tool for work experience placements
- Use the planning protocol created by industry reps and members of the Tourism Educators Consortium for ongoing assessment of education and training needs, as well as priority setting at a provincial level.