

APRIL 20, 2022

# BC TOURISM & HOSPITALITY LABOUR SHORTAGES & RESOURCES FOR SUCCESS

TOURISM KAMLOOPS SUMMIT

GINGER BRUNNER  
SENIOR HR SPECIALIST



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Photo credit Destination BC

## WHO WE ARE

go2HR is BC's  
tourism and  
hospitality  
human resource  
and health &  
safety  
association.

- Health & Safety
- Human Resources
- Industry Training
- Research and Strategy

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## go2HR PROGRAM & SERVICES

- Website
- Job Board
- HR Consultants
- Health & Safety (H&S) Advisors
- Learning Coaches - Psychological H&S
- Training
- Industry Research & Reports



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## AGENDA

### **BC Tourism and Hospitality Labour Market Information (LMI) Research Project**

- Overview of the Labour Market
- Workforce Profiles (BC, Region, Sector)
- Impact of COVID-19
- Attracting & Retaining Future Workforce

### **BC Tourism and Hospitality Labour Recovery Framework (LFR)**

- Solutions-based, industry-driven framework
- Developed with industry experience, consensus and prioritization
- 6 pillars



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- 6 pillars, each with supporting initiatives



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## OVERVIEW

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### BC TOURISM & HOSPITALITY LABOUR MARKET INFORMATION RESEARCH PROJECT



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## go2HR Labour Market Information (LMI) Project

The purpose of the LMI Project is to provide industry and employers with more **up-to-date access** to LMI as we recover from the pandemic.

Project Outputs:

- Month over month **changes** in industry employment - **Employment Tracker**
- The **impact of COVID-19** on the characteristics of the tourism & hospitality industry (e.g. employers and employees in the industry) - **Workforce Profiles**
- BC and regional **labour market forecasts** for the **next 1 to 5 years**, reflecting various COVID-19 economic recovery scenarios- **LMI Report**

The project will outline steps that the industry and its major stakeholders could take to ensure an adequate workforce **during** and **after** the industry recovery from the COVID-19 pandemic.



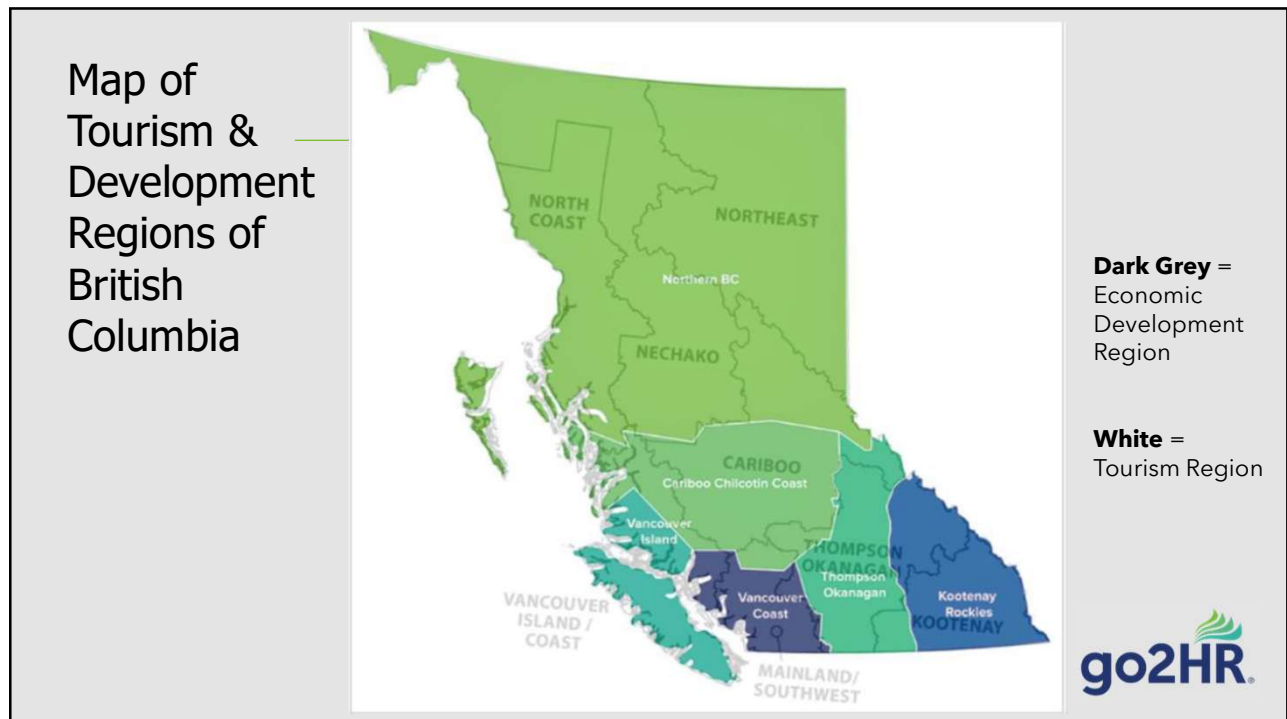
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**Launched July 2021**

**BC TOURISM AND HOSPITALITY LABOUR MARKET INFORMATION – EMPLOYMENT TRACKER**

The Employment Tracker is an interactive, online tool that industry can use to report on and explain employment statistics in the BC tourism and hospitality sector. The tracker will be updated monthly. Sign up for monthly updates [here](#).

### BC Tourism and Hospitality Employment Tracker

#### Introduction

The Employment Tracker reports on monthly changes in employment in the BC Tourism and Hospitality industry. The Tracker draws primarily from the Labour Force Survey (LFS), a monthly household survey conducted by Statistics Canada. The LFS is the most timely source of data on the labour market across Canada.

go2HR receives LFS tables generated by Catalyst Research Group via [Statistics Canada's Real Time Remote Access \(RTRA\) Program](#) that follows the [Tourism Satellite Account's definition of tourism](#). This data enables go2HR to track changes in employment and major trends in the Tourism and Hospitality industry in BC and monitor the ongoing impact of COVID-19 on the Tourism and Hospitality industry.

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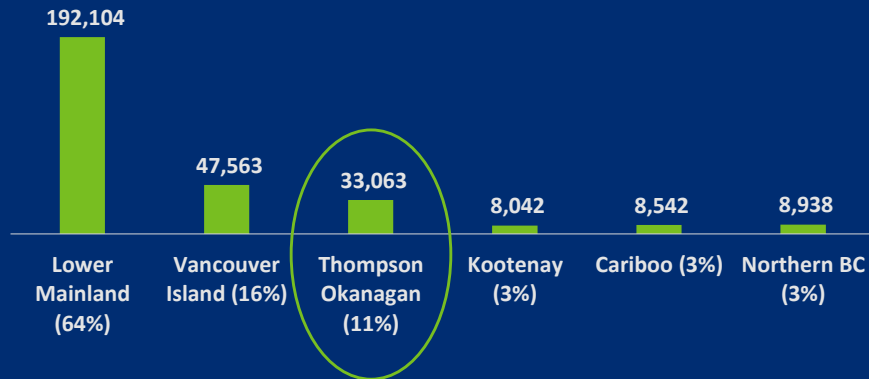
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## Industry Employment by Region

- The Lower Mainland accounts for **about two-thirds** of industry employment.
- The **Thompson Okanagan** is the **third** largest tourism employment region

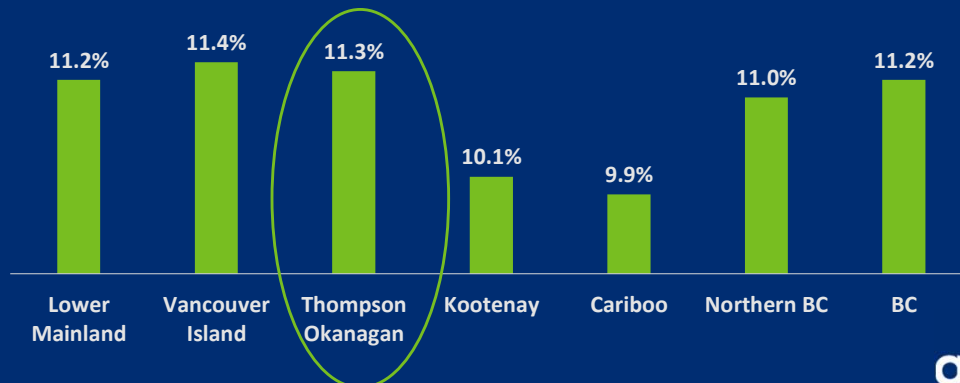


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## Industry Share of Total Employment

- In 2021, the relative share of tourism and hospitality employment to total regional employment was around 10% to 11% across all regions.

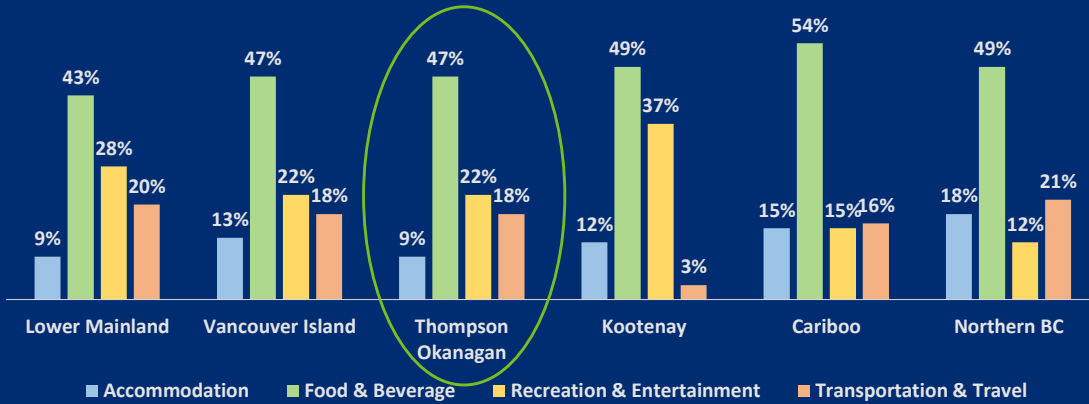


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## Regional Employment Distribution

In 2021 the percentage share of employment by sector varied somewhat across regions.



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## BC TOURISM & HOSPITALITY WORKFORCE PROFILE

### CHARACTERISTICS

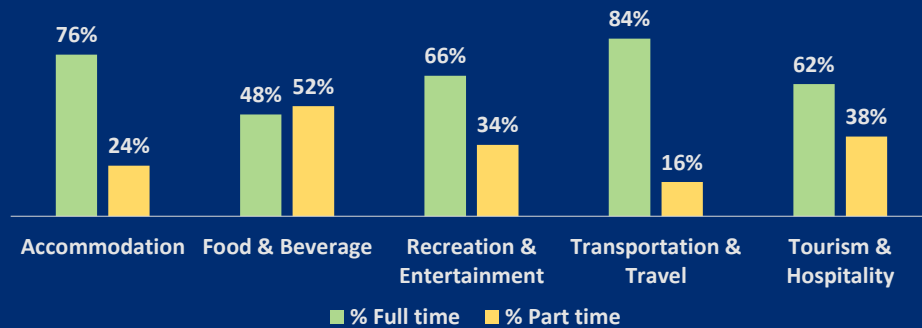
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## BC Workforce Characteristics – Job Status

Approximately **62%** of the industry workforce are employed on a **full-time** basis and **38%** are employed **part-time**.

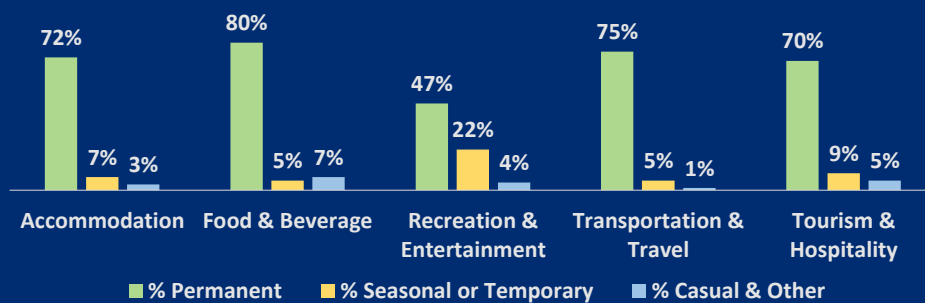


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## BC Workforce Characteristics – Job Type

**Permanent** workers account for **70%** of the industry workforce, while **14%** are **seasonal, temporary, or casual workers**.

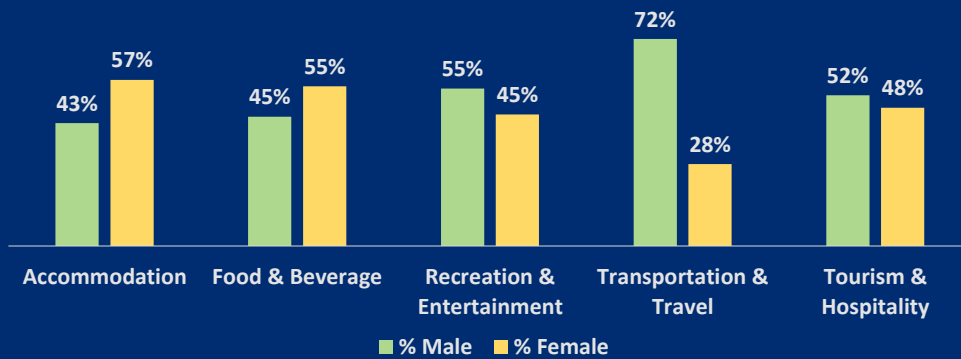


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## BC Workforce Characteristics - Gender

The gender of the workforce is relatively **evenly divided** in all sectors **except Transportation & Travel**.

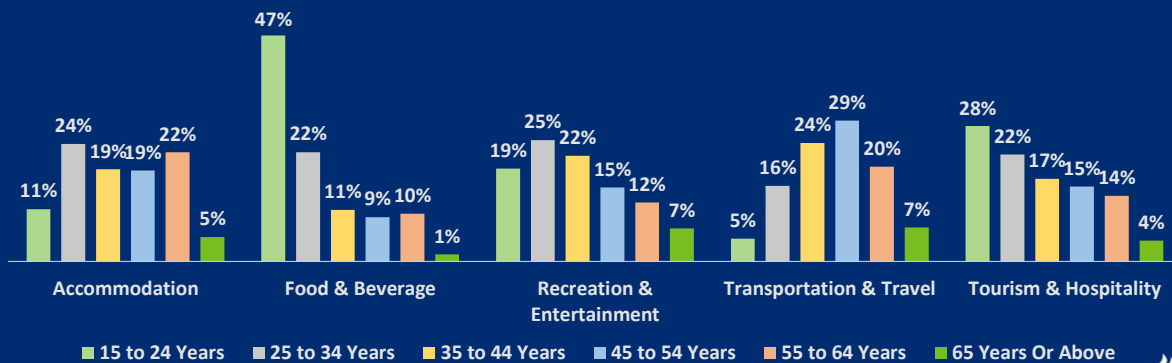


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## BC Workforce Characteristics – Age Groups

**Half** of the industry workforce is **under the age of 35**.

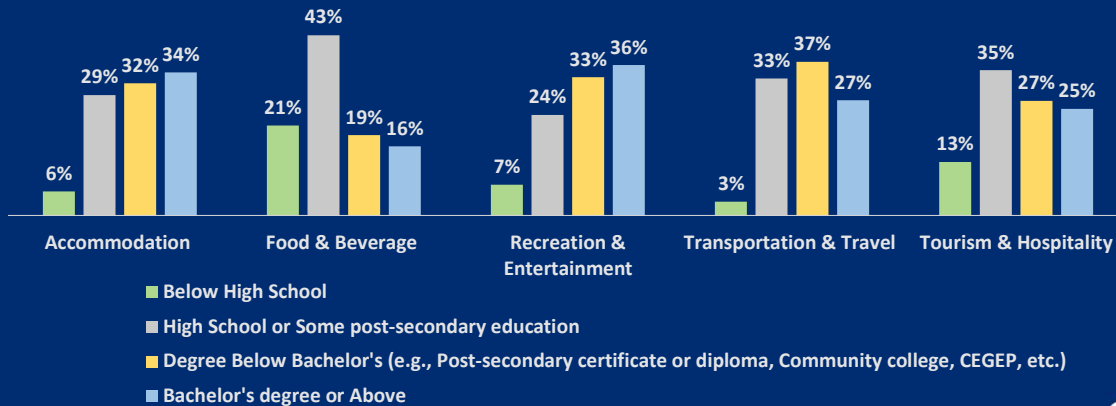


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## BC Workforce Characteristics - Education

Over half (**52%**) of employees have a post-secondary **degree or diploma**.

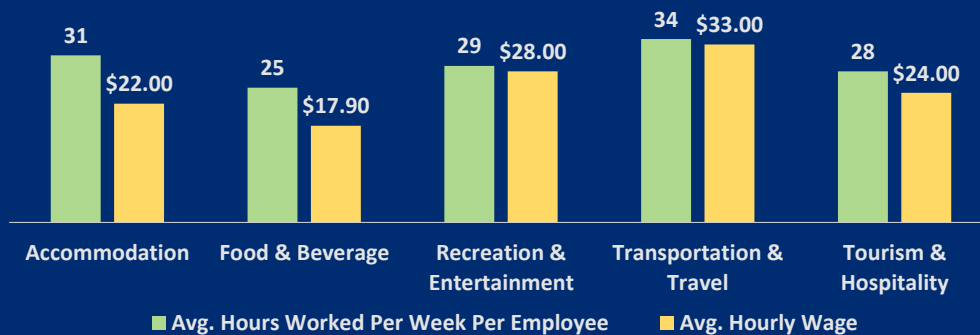


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## BC Workforce Characteristics – Actual Hours Worked & Hourly Wage

In 2021, employees in the **Transportation & Travel** sector worked the **most hours** and were **paid the highest wages** on average.



Note: Wage includes tips and commissions.

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## Workforce Characteristics – Ethnicity, Immigration, and Mother Tongue

- According to Statistics Canada's 2016 Census, approximately 6% of BC's tourism and hospitality workforce are Indigenous, and 35% are members of a visible minority.

Selected Characteristics (2016 Census)	Accommodation		Food & Beverage		Recreation & Entertainment		Transportation & Travel		Total	
	#	%	#	%	#	%	#	%	#	%
<b>Labour Force</b>	36,060	100%	159,570	100%	76,690	100%	54,355	100%	326,675	100%
<b>Aboriginal Status</b>										
Aboriginal	2,385	7%	9,685	6%	3,605	5%	2,215	4%	17,890	6%
Non-Aboriginal	33,675	93%	149,885	94%	73,085	95%	52,140	96%	308,785	94%
<b>Visible Minority Status</b>										
Visible Minority	11,885	33%	67,580	42%	16,145	21%	17,245	32%	112,855	35%
Not a Visible Minority	24,175	67%	91,990	58%	60,545	79%	37,110	68%	213,820	65%
<b>Immigration Status</b>										
Non-immigrant	21,910	61%	98,735	62%	56,855	74%	34,925	64%	212,425	65%
Immigrant	12,790	35%	52,355	33%	16,920	22%	18,760	35%	100,825	31%
Non-permanent residents	1,360	4%	8,480	5%	2,915	4%	670	1%	13,425	4%
<b>Mother Tongue</b>										
English	23,060	63%	97,830	62%	59,995	78%	35,620	65%	216,505	67%
French	640	2%	1,570	1%	1,350	2%	1,010	2%	4,570	1%
Non-official language	11,420	32%	56,170	35%	13,950	18%	16,645	31%	98,185	30%
Other	940	3%	4,000	2%	1,395	2%	1,080	2%	7,415	2%

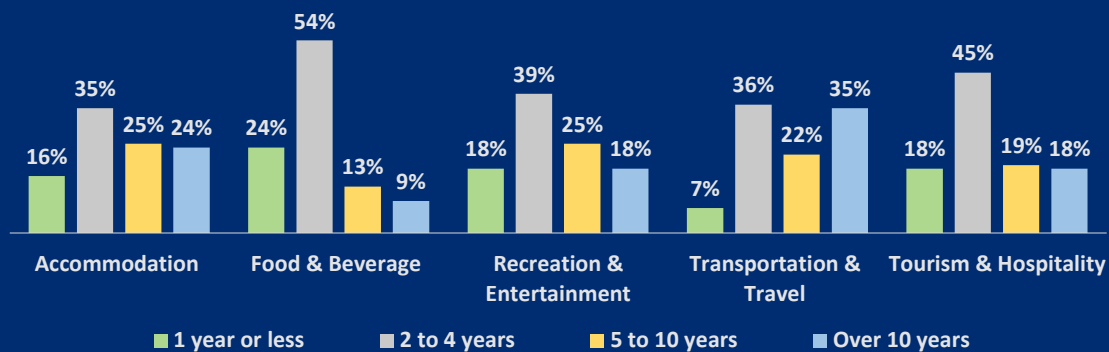
Source: Custom Tabulation, 2016 Census, Statistics Canada.

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## BC Workforce Characteristics – Work Experience

The majority of the provincial industry workforce has been employed in their current or latest job for **less than five years**. The industry workforce has an **average length of employment of 7 years**.



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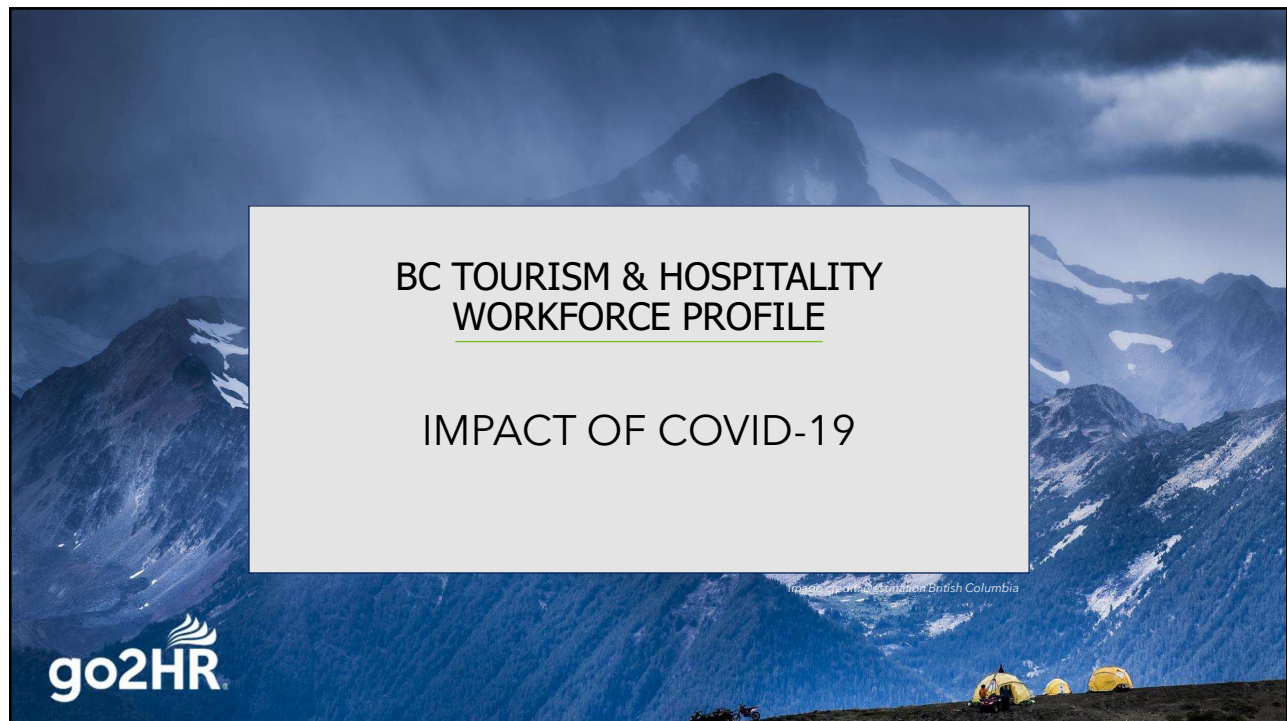
## Workforce Characteristics – Leading Occupations

Occupations often related to the **food and beverage services sector** accounted for the four top occupations in the industry.

NOC	Occupation Title	Certification/Training Requirements	Primary sector	Employment
671	Food counter attendants	<ul style="list-style-type: none"> <li>On the job training</li> </ul>	Food and Beverage services	43,625
632	Chefs and cooks	<ul style="list-style-type: none"> <li>Cook's trade certification</li> <li>Chef's Red Seal Certification</li> </ul>	Food and Beverage services	30,917
651	Occupations in food and beverage service	<ul style="list-style-type: none"> <li>On the job training</li> <li>Responsible beverage service certification</li> </ul>	Food and Beverage services	34,708
631	Food service supervisors	<ul style="list-style-type: none"> <li>Post-secondary training in restaurant management or food service admin, or;</li> <li>Equivalent job experience</li> </ul>	Food and Beverage services	30,146



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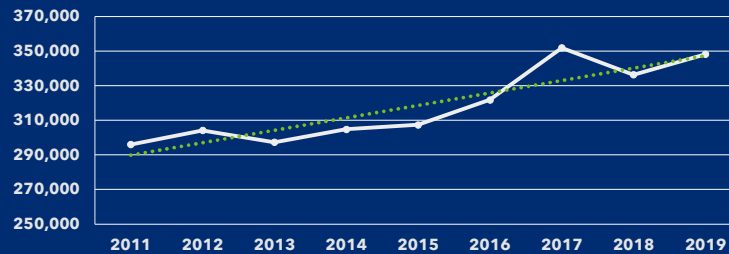


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## Employment Prior to COVID-19

Prior to the pandemic, the industry was a **significant and growing source of employment** for a broad cross-section of British Columbians across all regions of the province.



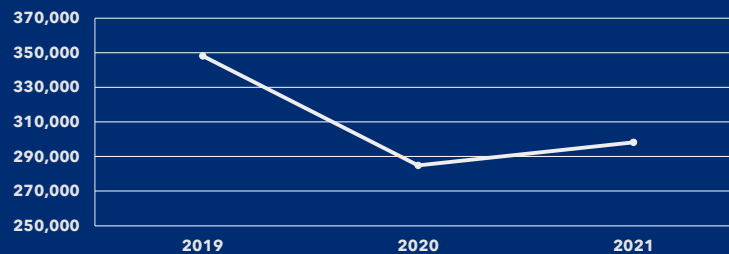
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access. Data is not seasonally adjusted.  
Note: Data presented are averages of monthly employment for each year.



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## Decline in Employment in 2020 and 2021

The pandemic caused a **precipitous decline in employment** in April and May 2020, and continued to suppress employment throughout the rest of the year



Employment levels for 2021 were 5% higher than 2020 but still 14% less than in 2019.

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access. Data is not seasonally adjusted.  
Note: Data presented are averages of monthly employment for each year.



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## Impact of COVID-19 - Sector and Region

Average annual employment decline was 18% in 2020 compared to 2019. While employment has gradually recovered from late 2020 into 2021, it is still **14% lower than pre-pandemic levels**.

Employment	2019	2020	2021	% Change 2020 vs 2019	% Change 2021 vs 2019
<b>Sector</b>					
Accommodation	36,458	25,689	29,875	-30%	-18%
Food and Beverage	153,729	133,188	133,938	-13%	-13%
Recreation and Entertainment	89,479	71,438	77,854	-20%	-13%
Transportation and Travel	68,369	54,583	56,583	-20%	-17%
<b>Region</b>					
Lower Mainland	227,875	191,292	192,104	-16%	-16%
Vancouver Island	53,167	43,104	47,563	-19%	-11%
Thompson Okanagan	37,063	26,729	33,063	-28%	-11%
Kootenay	9,646	8,750	8,042	-9%	-17%
Northern BC	11,250	7,379	8,938	-34%	-21%
Cariboo	9,083	7,625	8,542	-16%	-6%
<b>Total</b>	<b>348,083</b>	<b>284,896</b>	<b>298,250</b>	<b>-18%</b>	<b>-14%</b>

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## Layoffs and Hiring

**As a result of staff cuts and layoffs, the size of available workforce has declined.**

- One permanent staff member was laid off during the pandemic for every 1.6 permanent employees they currently employed
- 62% were eventually rehired (**38% did not return**)
- In 2021, 38% of seasonal workers returned to their positions, down from 49% in a typical year
- Fewer new workers were hired in 2020 and 2021 to maintain the workforce than in a typical year



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## Impact of COVID-19 on Employees

- **60% of the employees surveyed noted that the pandemic negatively impacted their interest in working in the industry in the future.** As such, the pandemic has:
  - Aggravated concerns about the level and reliability of work available
  - Raised new health concerns and restrictions
  - Impacted relationships with the business, customers, and others
- Of those surveyed, **one-third were unsure about their future in the industry** and 7% were already planning to leave or had left.



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## Impact of COVID-19 – BC Demographics

- **Full-time jobs** saw larger **declines** than part-time jobs through 2020 and 2021.
- Similarly, **non-permanent employees** saw larger **declines** through 2020 and 2021.

Demographics	2019	2020	2021	% Change 2020 vs 2019	% Change 2021 vs 2019
<b>Job Status</b>					
<b>Full-time</b>	225,854 (65%)	182,948 (64%)	186,125 (62%)	-19%	-18%
<b>Part-time</b>	122,229 (35%)	101,948 (36%)	112,125 (38%)	-17%	-8%
<b>Permanent</b>					
<b>Permanent</b>	234,333 (67%)	193,229 (68%)	208,104 (70%)	-18%	-11%
<b>Seasonal</b>	16,000 (5%)	8,333 (3%)	9,667 (3%)	-48%	-40%
<b>Casual</b>	25,771 (7%)	18,896 (7%)	14,667 (5%)	-27%	-43%
<b>Temporary</b>	20,854 (6%)	14,500 (5%)	19,083 (6%)	-30%	-8%



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## Impact of COVID-19 – BC Demographics Continued

- **Women**, those **under the age of 25**, and workers **without a high school education** experienced **significant declines** than other demographics.

Demographics	2019	2020	2021	% Change 2020 vs 2019	% Change 2021 vs 2019
<b>Gender</b>					
Male	172,588 (50%)	149,323 (52%)	155,604 (52%)	-13%	-10%
Female	175,495 (50%)	135,573 (48%)	142,646 (48%)	-23%	-19%
<b>Age Group</b>					
15 to 24	104,791 (30%)	73,083 (26%)	83,021 (28%)	-30%	-21%
25 to 34	75,688 (22%)	66,198 (23%)	65,583 (22%)	-13%	-13%
35 to 44	55,979 (16%)	50,448 (18%)	50,584 (17%)	-10%	-10%
45 to 54	53,500 (15%)	43,958 (15%)	46,000 (15%)	-18%	-14%
55 to 64	43,750 (13%)	40,271 (14%)	40,354 (14%)	-8%	-8%
65 or above	14,375 (4%)	10,938 (4%)	12,708 (4%)	-24%	-12%
<b>Education</b>					
Below high school	43,250 (12%)	29,167 (10%)	37,833 (13%)	-33%	-13%
High school or some post-secondary	130,249 (37%)	104,073 (37%)	103,324 (35%)	-20%	-21%
Degree below bachelor's	97,667 (28%)	84,802 (30%)	81,447 (27%)	-13%	-17%
Bachelor's degree or above	76,917 (22%)	66,854 (23%)	75,646 (25%)	-13%	-2%



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## Impact of COVID-19 – Average Hourly Wage

Average hourly wages for the industry **increased by 14%**, with the **transportation and travel sector** and **Thompson Okanagan** seeing the largest wage **increases** from 2019 to 2021.

Average Hourly wage	2019	2020	2021	% Change 2020 vs 2019	% Change 2021 vs 2019
<b>Sector</b>					
Accommodation	\$21.0	\$22.0	\$22.0	5%	5%
Food and Beverage	\$16.1	\$17.5	\$17.9	9%	11%
Recreation and Entertainment	\$24.0	\$27.0	\$28.0	13%	17%
Transportation and Travel	\$28.0	\$32.0	\$33.0	14%	18%
<b>Region</b>					
Lower Mainland	\$22.0	\$23.8	\$24.4	8%	11%
Vancouver Island	\$20.0	\$21.0	\$22.0	5%	10%
Thompson Okanagan	\$18.4	\$20.0	\$23.0	9%	25%
Kootenay	\$18.3	\$20.0	\$20.0	9%	9%
Northern BC	\$18.4	\$22.0	\$21.0	20%	14%
Cariboo	\$19.8	\$22.0	\$20.0	11%	1%
<b>Total</b>	<b>\$21.0</b>	<b>\$23.0</b>	<b>\$24.0</b>	<b>10%</b>	<b>14%</b>

*Wages includes tips and commissions*



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## Key Indicators by Region

Key Indicators (2021)	Lower Mainland	Vancouver Island	Thompson Okanagan	Kootenay	Cariboo	Northern BC	BC
<b>Employment 2021</b>	192,104	47,563	33,063	8,042	8,542	8,938	298,250
<b>Length of Employment of Current or Latest Job</b>							
<b>Less than 1 year</b>	18%	18%	18%	25%	18%	19%	18%
<b>2 to 4 years</b>	45%	44%	42%	45%	52%	47%	45%
<b>5 to 10 years</b>	19%	18%	25%	15%	21%	21%	19%
<b>Over 10 years</b>	18%	19%	15%	16%	10%	13%	18%
<b>Avg. Length in years</b>	7.1	7.8	6.1	6.2	5.5	5.7	7.0
<b>Job Status</b>							
<b>% Full-time Workers</b>	64%	58%	61%	59%	55%	66%	62%
<b>% Permanent Workers</b>	68%	73%	76%	69%	79%	71%	70%
<b>Age Group</b>							
<b>15 to 24 years</b>	25%	30%	32%	37%	43%	32%	28%
<b>25 to 34 years</b>	22%	18%	24%	22%	25%	31%	22%
<b>35 to 44 years</b>	18%	15%	16%	11%	13%	10%	17%
<b>45 to 54 years</b>	16%	13%	16%	13%	11%	15%	15%
<b>55 to 64 years</b>	14%	17%	8%	9%	7%	8%	14%
<b>Over 64 years</b>	4%	7%	4%	7%	1%	4%	4%

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## Key Indicators by Region Continued

Key Indicators (2021)	Lower Mainland	Vancouver Island	Thompson Okanagan	Kootenay	Cariboo	Northern BC	BC
<b>Gender and Education</b>							
<b>% Female</b>	47%	46%	46%	60%	59%	53%	48%
<b>% Bachelor's degree or above</b>	29%	20%	19%	21%	6%	22%	25%
<b>Ethnicity and Immigration* (2016 Census)</b>							
<b>% Aboriginal</b>	3%	8%	9%	7%	16%	22%	6%
<b>% Visible Minority</b>	46%	15%	13%	8%	13%	17%	35%
<b>% Immigrant</b>	40%	17%	14%	11%	13%	15%	31%
<b>Mother Tongue* (2016 Census)</b>							
<b>% English</b>	56%	83%	85%	83%	84%	80%	67%
<b>% French</b>	1%	2%	2%	1%	1%	1%	1%
<b>% Non-official language</b>	40%	14%	12%	10%	14%	17%	30%
<b>Industry Satisfaction and Perception**</b>							
<b>Employee Satisfaction Rating</b>	4.2	3.8	3.8	4.1	4.3	4.3	4.0
<b>Covid-19 Impacted their Interest</b>	58%	64%	60%	67%	40%	40%	60%

Note: Cariboo and Northern BC Ratings reported from Surveys are being combined due to the small sample size.



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## Employer Perception on Industry Recovery

- **Industry recovery will require significant numbers of new hires** to fill new temporary, seasonal, and permanent positions.
  - One person for every two people currently employed will need to be hired
- **Almost all employers (97%) anticipate difficulties** in filling vacant positions.
  - Difficulty was rated at a 4.3/5 by employers



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## Hiring Difficulties

**Contributing factors to hiring difficulties highlighted by employers include:**

- Limited **interest** in the sector or occupation amongst youth
- Limited access to **affordable housing**
- Broad and complex nature of the positions and **fewer applicants** with the skill sets and experience required
- Strong **competition for workers** from other businesses
- Limited **transportation** access
- Concerns about **health & safety**



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# The Great Unknown

What will **employment levels** be over the next five years?

That will depend, in part, on:

- The future of the pandemic
- The unravelling of pent-up demand
- The new normal for the tourism and hospitality industry
- The labour market supply



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## BC TOURISM & HOSPITALITY LABOUR RECOVERY FRAMEWORK (LRF)

Industry consensus on targeted, prioritized  
solutions to advance tourism and  
hospitality labour recovery and fuel BC's  
economic strategy

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## RESPONSE: LABOUR RECOVERY FRAMEWORK

Industry agreed on the need for a **Labour Recovery Framework** (LRF) that would be:

- **Solutions-based:** we would reach consensus on solutions to labour recovery
- **Prioritized and actionable:** our efforts would be targeted, versus a do-it-all approach
- **Grounded:** outcomes would require capacity and investment



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## SIX PILLARS

### BC's Tourism and Hospitality Labour Recovery Framework

Experienced leaders formed an **Industry Engagement Working Group** to agree on areas of focus, with priorities and initiatives for each pillar

#### 1. Grow Labour Supply

- Maintain and retain people that work in tourism and hospitality and remove barriers willing to join our industry

#### 2. Renew Our Value

- Communicate the value of our industry as a place to work, and as a foundational contributor to BC's economic strategy

#### 3. Engage On Housing

- Share knowledge that informs an understanding of how housing availability and affordability affects our labour supply

#### 4. Build Back Stronger

- Fuel longer-term change to industry business practices through human resources and workforce development advisory services

#### 5. Future-Proof Skills Development

- Improve access and applicability of industry training, identify emerging training and equip employers with skills development focused on our industry's future

#### 6. Transform With Technology

- Find, share and pilot technology to help our industry invest in people and products

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## Labour Recovery Framework (LRF) Initiatives

Industry Engagement Working Group prioritized a set of new initiatives for each pillar – all require capacity and investment

PILLAR	INITIATIVES
<b>1: Grow Labour Supply</b>	1.1: Tourism of Tomorrow   1.2: Experience Tourism   1.3: Teaching Tourism Toolkit   1.4: Post-Secondary Pursuit   1.5: International Worker Access   1.6: Indigenous Inclusion   1.7: Newcomer Advocate   1.8: Opportunity For All
<b>2: Renew Our Value</b>	2.1: Recalibrating Our Value To Workers   2.2: Multi-Modal Messaging   2.3: Research and Metrics That Matter
<b>3: Engage On Housing</b>	3.1: Tourism and Hospitality Community Housing Liaison
<b>4: Build Back Stronger</b>	4.1: Raise The HR Bar   4.2: Business Practices Pilot
<b>5: Future-Proof Skills Development</b>	5.1: Skill Sustainer Advisor   5.2: Train @ Work in Tourism Grant   5.3: SuperHost Starter
<b>6: Transform with Technology</b>	6.1: Tech/Tourism Hub   6.2: Tech In Tourism Innovation Grant

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## Labour Recovery Framework (LRF) Initiatives

### WHAT ARE THE BENEFITS?



#### Creating the Workforce and Workplace of Tomorrow

Delivering human resources and workforce and skills development advisory services can create workplaces that put people first.



#### Greater Inclusivity and Reconciliation

Investing in identifying and removing barriers and welcoming everyone who wants to work in our industry - for a season or a lifetime - can benefit workers and employers.



#### Sustainable and Innovative Job Growth

Our industry includes jobs that help create a lower-carbon economy in BC. Investing in industry recovery - and the implementation of new technology - can drive our shared climate and clean-tech objectives.



#### Sustained Business and Community Vitality

Our industry has been an engine of opportunity for every BC community. Investing in industry recovery can contribute to community recovery and longer-term vitality.

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## REGIONAL HR CONSULTANTS

- MTACS funding for Regional HR Consultant Network (recruitment actively underway)
- 2-year project - builds on success of TOTA and VCM
- Work will be done in in close collaboration with RDMOs
- Boots on the ground targeted for May 1



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## BC TOURISM & HOSPITALITY LABOUR SHORTAGES & RECOVERY

### KEY TAKE AWAYS

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## KEY TAKE AWAYS

- Pre-pandemic labour challenges still exist, COVID made it worse
- Industry now has access to real-time labour data to understand the impacts on a micro and macro level
- We now have tools to better understand:
  - Industry employment trends - EMPLOYMENT TRACKER
  - who makes up our industry - WORKFORCE PROFILES
- go2HR's collaborative Labour Recovery Framework (LRF) dovetails with the LMI Project to create solutions to industry labour challenges as we recover
- Industry-focused recover initiatives are underway... HR Consultants coming!
- For more information visit the go2HR website or contact Ginger


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## THANK YOU

## Q&A



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