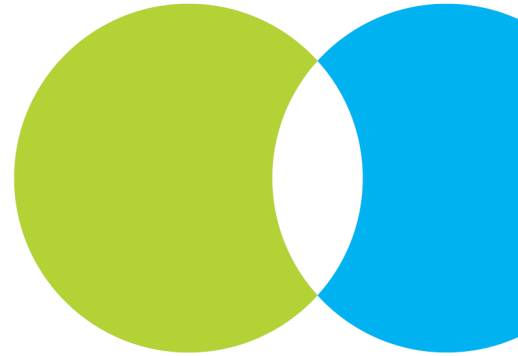
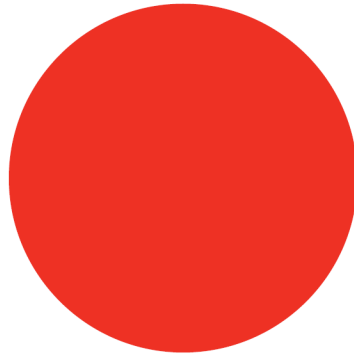


**The Conference  
Board of Canada**



# **Briefing: COVID-19 Impact on Tourism Sector Employment and Revenues**

Presented for:  
Tourism HR Canada

Prepared by:  
The Conference Board of Canada  
September 14, 2020

Tourism **HR**  
Canada



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Canada

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## Background

Although the precise economic and financial toll of COVID-19 on the economy remains uncertain and depends on how long the crisis lasts, Canada's tourism sector has already faced significant challenges and will likely continue to do so over the foreseeable future. In addition to operating in a weaker economic environment, the tourism sector has also had to cope with added policy decisions that range from an outright shut down of operations to restrictions that severely curtailed potential revenues.

The analysis in this briefing provides an objective assessment of the degree to which COVID-19 has already impacted Canada's tourism sector and what the future may hold, based on our best judgement at the current time.

## Key Assumptions

The Conference Board of Canada has a history of regularly producing tourism activity projections along with labour supply and demand projections for the tourism sector. The most recent (pre-COVID-19) projections suggested that the outlook for both tourism activity and the tourism sector was for continued growth, albeit at more modest pace—due primarily to slowing economic growth in Canada and globally. Still, the outlook had suggested that real revenues for the tourism sector had the potential to increase 2.4% per year between 2016 and 2020, and then would ease slightly to 2.1% between 2021 and 2025. During this period, the strongest growth would come from tourism activity, in particular demand from foreign tourism.

It goes without saying that the COVID-19 pandemic has now dramatically altered our short-term and medium-term outlooks for both tourism activity and the tourism sector. While it is perhaps unreasonable to assume that any analysis at this point could accurately project the full impact that COVID-19 can have on virtually any aspect of the economy, using available data, it is possible to provide a perspective based on a few assumptions.

Table 1 presents some of the high-level guiding assumptions that were used to generate the specific modelled results that examined the impact of COVID-19 on the tourism sector in 2020. The values in the table reflect the degree to which COVID-19 is estimated to impact revenues

from various tourism and non-tourism sources in each tourism industry, compared against 2019 levels (in real terms).

**Table 1**

**Impact of COVID-19 on Tourism and Associated Non-Tourism Demand in Canada – 2020**  
(% impact relative to Pre-COVID, \$2019)

	<b>Domestic Tourism</b>	<b>International Tourism</b>	<b>Non-Tourism Demand</b>
Transportation*	-42.3%	-76.0%	-16.8%
Air transportation	-56.0%	-76.0%	-50.0%
Rail transportation	-25.0%	-76.0%	-20.0%
Other transportation	-25.0%	-76.0%	-15.0%
Accommodation	-50.0%	-76.0%	-40.0%
Food and beverage services	-56.0%	-76.0%	-40.0%
Recreation and entertainment	-50.0%	-76.0%	-40.0%
Travel services	-50.0%	-76.0%	-40.0%
Other (Non-tourism industries)*	-52.3%	-76.0%	-40.0%
<b>TOTAL DEMAND*</b>	<b>-49.0%</b>	<b>-76.0%</b>	<b>-29.2%</b>

Note: \* symbol indicates that these industry categories are calculated (based on the relative weights of various components).

Source: The Conference Board of Canada.

Table 2 expands on Table 1 by providing a high-level assessment of the degree to which COVID-19 will continue to impact the tourism sector in 2021. Again, the values in the table reflect the degree to which COVID-19 is estimated to impact revenues from various tourism and non-tourism sources in each tourism industry, compared against 2019 levels (in real terms).

**Table 2**

**Impact of COVID-19 on Tourism and Associated Non-Tourism Demand in Canada – 2021**  
(% impact relative to Pre-COVID, \$2019)

	<b>Domestic Tourism</b>	<b>International Tourism</b>	<b>Non-Tourism Demand</b>
Transportation*	-17.8%	-23.0%	-8.6%
Air transportation	-20.0%	-23.0%	-20.0%
Rail transportation	-20.0%	-23.0%	-15.0%
Other transportation	-15.0%	-23.0%	-8.0%
Accommodation	-20.0%	-23.0%	-15.0%
Food and beverage services	-20.0%	-23.0%	-15.0%

Recreation and entertainment	-20.0%	-23.0%	-15.0%
Travel services	-20.0%	-23.0%	-15.0%
Other (Non-tourism industries)*	-20.0%	-23.0%	-15.0%
<b>TOTAL DEMAND*</b>	<b>-19.1%</b>	<b>-23.0%</b>	<b>-12.0%</b>

Note: \* symbol indicates that these industry categories are calculated (based on the relative weights of various components).

Source: The Conference Board of Canada.

Table 3 shows a high-level assessment of the degree to which COVID-19 will continue to impact the tourism sector between 2022-2025, by year and by revenue source. The values in this table reflect the degree to which COVID-19 is estimated to impact revenues from various tourism and non-tourism sources in aggregate, compared against 2019 levels (in real terms). Where a value in the table reaches 0.0%, it is assumed that particular revenue stream has fully recovered to its pre-COVID level. Hence, from that point forward, it is assumed that growth would continue to occur, based on average growth projections for that year based on the recent forecasts.<sup>1</sup>

**Table 3**

**Impact of COVID-19 on Tourism and Associated Non-Tourism Demand in Canada – 2022**  
(% impact relative to Pre-COVID, \$2019)

	<b>Domestic Tourism</b>	<b>International Tourism</b>	<b>Non-Tourism Demand</b>
2022 Total Demand*	-4.0%	-15.0%	-2.0%
2023 Total Demand*	0.0%	-6.0%	0.0%
2024 Total Demand*	0.0%	-1.0%	0.0%
2025 Total Demand*	0.0%	0.0%	0.0%

Note: \* symbol indicates that within each revenue source, it is assumed that the impact among tourism industries is projected to be largely similar.

Source: The Conference Board of Canada.

## COVID-19 Impact on Employment - Canada

The most current data from Statistics Canada's Provincial-Territorial Human Resource Module (PT-HRM) of the Tourism Satellite Account indicate that, on average throughout the year, Canada's tourism sector provided a little more than 1.89 million jobs in 2018. Based on the level of employment, by industry and province/territory provided by the PT-HRM, this data was advanced one year (to 2019) based on associated industry and regional data provided by

<sup>1</sup> The specific growth rates that would apply were those found in the 2019 update to the Tourism Labour Supply and Demand report produced by the Conference Board of Canada. In particular, the rate was calculated as the average of both labour supply and labour demand in each industry and in each province/territory.

Statistics Canada’s Labour Force Survey (LFS). The results of this process suggested that overall tourism sector employment had slipped by just under 11,700 to 1.88 million jobs—a dip of nearly 26,000 in food and beverage services employment countered increases in other industry groups.

The employment estimates from 2019 were then further broken down into quarter (using the LFS data) to establish a benchmark against which the COVID-19 impact could be referenced.

In order to estimate the impact COVID-19 would have on employment, it is important to understand that the order of magnitude and the timing may not relate directly, on a 1-1 proportional basis, to the impact on revenues. In particular, during 2020 there were numerous government programs that provided financial assistance to both businesses and workers to alleviate some of the hardship that COVID-19 was having on the economy. Other potential factors that could account for the disparity include the presence of unions and the difficulty to recruit workers that might be let go. It could also account for a reduction in the average hours of employment provided to workers or more part-time staff and so forth.

Based on the degree to which employment (as measured by the LFS) and tourism sector revenues (as measured by Statistics Canada’s National Tourism Indicators) diverged during the first quarter of 2020, assumptions were made to identify the relationship for the balance of 2020 and 2021. The assumptions were also based on expectations related to the duration of financial support programs.

Table 4 shows that assumed revenue-employment ratio determined to apply for tourism industries in 2020 and 2021. After 2021, it was assumed that revenues and employment level would respond in a coordinated (1-1) manner. A figure of 50% in the table means that if revenues were to drop off 10%, it would be assumed that employment levels would drop of by half (50%) of that, or 5%.

**Table 4**  
**Impact of COVID-19 on Tourism Sector Employment in Canada**  
 (Change in employment relative to change in revenues)

	<b>2020</b>	<b>2021</b>
Air transportation	50%	75%
Rail transportation	50%	75%
Other transportation	50%	75%
Accommodation	55%	78%
Food and beverage services	60%	80%

Recreation and entertainment	70%	85%
Travel services	60%	80%

Source: The Conference Board of Canada.

Based on the expected impact on tourism sector revenues and the degree to which employment levels might be impacted, projections were made to account for tourism sector employment. The employment estimates for 2020 were also impacted by available labour force data that already provided insights into six months (two quarters) of 2020.

Table 5 reveals the actual and projected average annual employment levels for tourism industries from 2019 (pre-COVID-19) through to 2021.

**Table 5**  
**Impact of COVID-19 on Tourism Sector Employment in Canada**  
(Average number of annual jobs)

	2019	2020	2021
Transportation	293,872	229,387	264,036
Air transportation	82,309	58,214	73,301
Rail transportation	6,415	5,096	5,735
Other transportation	205,147	166,077	185,000
Accommodation	203,151	139,334	179,535
Food and beverage services	1,058,677	776,046	930,626
Recreation and entertainment	271,457	185,969	235,457
Travel services	52,872	35,257	46,287
Tourism Sector	1,880,028	1,365,993	1,655,941

Source: The Conference Board of Canada.

Table 6 reveals the actual and projected average annual employment levels for the overall tourism sector, by province and for the territories, from 2019 (pre-COVID-19) through to 2021.

**Table 6**  
**Impact of COVID-19 on Tourism Sector Employment in Provinces/Territories**  
(Average number of annual jobs)

	2019	2020	2021
Newfoundland and Labrador	20,000	14,584	17,642
Prince Edward Island	7,571	5,244	6,657
Nova Scotia	47,425	34,695	41,762
New Brunswick	31,064	22,776	27,348
Quebec	388,460	284,379	342,036
Ontario	680,596	497,368	599,816

Manitoba	62,928	46,250	55,379
Saskatchewan	52,092	37,956	45,794
Alberta	264,512	193,204	233,019
British Columbia	319,104	225,314	280,941
Territories	6,276	4,222	5,547
Canada	1,880,028	1,365,993	1,655,941

Source: The Conference Board of Canada.

Table 7 breaks down the employment estimates for 2020 into quarters.

**Table 7**  
**Tourism Sector Employment Estimates for 2020**  
(Average number of jobs by quarter)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Transportation	279,576	199,806	208,107	230,060
Air transportation	72,952	49,933	53,313	56,659
Rail transportation	6,440	5,048	4,188	4,709
Other transportation	200,183	144,825	150,607	168,692
Accommodation	168,757	114,301	145,070	129,207
Food and beverage services	965,056	609,224	799,130	730,774
Recreation and entertainment	231,701	176,965	178,360	156,851
Travel services	56,757	34,007	24,469	25,793
Tourism Sector	1,701,847	1,134,303	1,355,137	1,272,686

Source: The Conference Board of Canada.

Table 8 isolates the impact of COVID-19 on the quarterly projections for 2020 relative to the pre-COVID-19 (2019) estimates. Specific monthly projections, within their respective quarters, may be higher or lower, but will average out to the quarterly figures.

**Table 8**  
**Tourism Sector Employment Estimates for 2020**  
(Difference in the number of jobs by quarter, relative to same quarter in 2019)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Transportation	-15,057	-97,819	-73,514	-71,547
Air transportation	-10,909	-34,372	-27,187	-23,912
Rail transportation	734	-1,392	-2,237	-2,379
Other transportation	-4,883	-62,055	-44,089	-45,256
Accommodation	-20,403	-80,391	-86,333	-68,143
Food and beverage services	-63,648	-448,073	-269,779	-349,022
Recreation and entertainment	-22,254	-98,068	-123,970	-97,656
Travel services	6,875	-19,896	-30,721	-26,716



Tourism Sector	-114,488	-744,249	-584,318	-613,085
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Source: The Conference Board of Canada.

Table 9 breaks down the employment estimates for the tourism sector in 2021 into quarters.

**Table 9**  
**Tourism Sector Employment Estimates for 2021**  
(Average number of jobs by quarter)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Transportation	247,895	261,724	258,387	288,136
Air transportation	69,162	73,228	73,455	77,357
Rail transportation	4,463	5,517	5,983	6,976
Other transportation	174,270	182,979	178,948	203,803
Accommodation	148,044	165,497	212,302	192,298
Food and beverage services	806,604	895,951	1,044,550	975,400
Recreation and entertainment	189,062	227,291	274,623	250,853
Travel services	36,261	44,522	51,050	53,316
Tourism Sector	1,427,865	1,594,985	1,840,912	1,760,003

Source: The Conference Board of Canada.

Table 10 isolates the impact of COVID-19 on the quarterly projections for 2021 relative to the pre-COVID-19 (2019) estimates. Specific monthly projections, within their respective quarters, may be higher or lower, but will average out to the quarterly figures.

**Table 10**  
**Tourism Sector Employment Estimates for 2021**  
(Difference in the number of jobs by quarter, relative to same quarter in 2019)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Transportation	-46,738	-35,901	-23,234	-13,471
Air transportation	-14,699	-11,077	-7,044	-3,215
Rail transportation	-1,244	-923	-442	-112
Other transportation	-30,796	-23,901	-15,748	-10,144
Accommodation	-41,117	-29,195	-19,101	-5,052
Food and beverage services	-222,099	-161,347	-24,360	-104,396
Recreation and entertainment	-64,894	-47,743	-27,707	-3,655
Travel services	-13,622	-9,382	-4,140	807
Tourism Sector	-388,469	-283,567	-98,542	-125,768

Source: The Conference Board of Canada.

Table 11 shows the average annual employment supported by the tourism sector between 2022 through to 2025.

**Table 11**  
**Impact of COVID-19 on Tourism Sector Employment in Canada**  
(Average annual jobs)

	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Transportation	280,503	295,615	300,948	304,670
Air transportation	77,374	82,447	84,356	85,419
Rail transportation	5,919	6,386	6,591	6,718
Other transportation	197,210	206,782	210,001	212,532
Accommodation	187,602	201,331	206,920	209,969
Food and beverage services	1,021,777	1,067,024	1,081,706	1,093,367
Recreation and entertainment	260,561	273,100	277,702	281,266
Travel services	49,202	52,916	54,501	55,349
<b>Tourism Sector</b>	<b>1,799,645</b>	<b>1,889,986</b>	<b>1,921,776</b>	<b>1,944,621</b>

Source: The Conference Board of Canada.

Table 12 isolates the impact of COVID-19 on annual projections from 2022 to 2025 relative to the pre-COVID-19 (2019) estimates. Overall, it is projected that employment in the tourism sector will rebound to 2019 levels by 2023. Some industries, like accommodation, are projected to take an extra year.

**Table 12**  
**Tourism Sector Employment Estimates for 2022-2025**  
(Difference in the number of annual jobs, relative to 2019)

	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Transportation	-13,369	1,744	7,076	10,798
Air transportation	-4,936	138	2,046	3,110
Rail transportation	-496	-29	177	303
Other transportation	-7,937	1,634	4,853	7,385
Accommodation	-15,550	-1,820	3,769	6,818
Food and beverage services	-36,900	8,347	23,029	34,690
Recreation and entertainment	-10,895	1,643	6,245	9,809
Travel services	-3,670	45	1,629	2,477
<b>Tourism Sector</b>	<b>-80,383</b>	<b>9,958</b>	<b>41,748</b>	<b>64,593</b>

Source: The Conference Board of Canada.

## Employment Impact – Provinces/Territories

Based on the expected impact on tourism sector revenues and the degree to which employment levels might be impacted (as discussed in the previous section), projections were made to account for the impact of COVID-19 on tourism sector employment in the provinces and territories. Once again, the employment estimates for 2020 were impacted by available labour force data that already provided insights into six months (two quarters) of 2020.

Table 13 reveals the actual and projected average annual employment levels for the overall tourism sector, by province and for the territories, from 2019 (pre-COVID-19) through to 2021.

**Table 13**  
**Impact of COVID-19 on Tourism Sector Employment in Provinces/Territories**  
(Average number of annual jobs)

	2019	2020	2021
Newfoundland and Labrador	20,000	14,584	17,642
Prince Edward Island	7,571	5,244	6,657
Nova Scotia	47,425	34,695	41,762
New Brunswick	31,064	22,776	27,348
Quebec	388,460	284,379	342,036
Ontario	680,596	497,368	599,816
Manitoba	62,928	46,250	55,379
Saskatchewan	52,092	37,956	45,794
Alberta	264,512	193,204	233,019
British Columbia	319,104	225,314	280,941
Territories	6,276	4,222	5,547
Canada	1,880,028	1,365,993	1,655,941

Source: The Conference Board of Canada.

Table 14 breaks down the overall tourism sector employment estimates for provinces/territories in 2020 into quarters.

**Table 14**  
**Tourism Sector Employment Estimates for 2020**  
(Average number of jobs by quarter)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Newfoundland and Labrador	19,068	15,772	12,065	11,431
Prince Edward Island	7,040	3,872	5,242	4,821
Nova Scotia	46,810	29,728	32,207	30,034
New Brunswick	29,423	24,467	19,261	17,953

Quebec	358,629	238,471	278,696	261,721
Ontario	599,633	392,613	512,515	484,712
Manitoba	58,585	42,946	43,253	40,215
Saskatchewan	48,490	28,286	39,196	35,853
Alberta	246,648	159,464	189,552	177,154
British Columbia	281,323	191,466	221,522	206,947
Territories	5,567	3,783	3,843	3,695
Canada	1,701,847	1,134,303	1,355,137	1,272,686

Source: The Conference Board of Canada.

Table 15 isolates the impact of COVID-19 on the quarterly projections for 2020 relative to the pre-COVID-19 (2019) estimates. Specific monthly projections, within their respective quarters, may be higher or lower, but will average out to the quarterly figures.

**Table 15**  
**Tourism Sector Employment Estimates for 2020**

(Difference in the number of jobs by quarter, relative to same quarter in 2019)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Newfoundland and Labrador	-307	-4,178	-8,496	-8,685
Prince Edward Island	-236	-3,666	-2,657	-2,750
Nova Scotia	1,014	-17,568	-16,710	-17,656
New Brunswick	-554	-6,509	-12,804	-13,285
Quebec	-16,616	-149,881	-121,644	-128,183
Ontario	-59,180	-288,567	-186,368	-198,794
Manitoba	-2,115	-19,850	-21,981	-22,767
Saskatchewan	-1,490	-23,514	-15,364	-16,172
Alberta	-8,985	-104,419	-83,402	-88,425
British Columbia	-26,119	-127,047	-109,982	-112,009
Territories	-531	-2,483	-2,694	-2,507
Canada	-114,488	-744,249	-584,318	-613,085

Source: The Conference Board of Canada.

Table 16 breaks down the employment estimates for the tourism sector in 2021 into quarters.

**Table 16**  
**Tourism Sector Employment Estimates for 2021**

(Average number of jobs by quarter)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Newfoundland and Labrador	15,322	16,987	19,540	18,719
Prince Edward Island	5,684	6,380	7,514	7,049
Nova Scotia	35,991	40,148	46,645	44,263

New Brunswick	23,538	26,284	30,589	28,981
Quebec	294,816	329,589	380,500	363,241
Ontario	518,938	578,926	662,864	638,534
Manitoba	47,607	53,248	61,985	58,675
Saskatchewan	39,004	43,826	51,856	48,492
Alberta	201,191	224,164	259,646	247,074
British Columbia	240,925	270,080	313,697	299,064
Territories	4,850	5,353	6,077	5,910
Canada	1,427,865	1,594,985	1,840,912	1,760,003

Source: The Conference Board of Canada.

Table 17 isolates the impact of COVID-19 on the quarterly projections for 2021 relative to the pre-COVID-19 (2019) estimates. Specific monthly projections, within their respective quarters, may be higher or lower, but will average out to the quarterly figures.

**Table 17**  
**Tourism Sector Employment Estimates for 2021**  
(Difference in the number of jobs by quarter, relative to same quarter in 2019)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Newfoundland and Labrador	-4,053	-2,962	-1,021	-1,397
Prince Edward Island	-1,593	-1,158	-384	-523
Nova Scotia	-9,805	-7,147	-2,272	-3,427
New Brunswick	-6,439	-4,693	-1,476	-2,256
Quebec	-80,429	-58,763	-19,840	-26,663
Ontario	-139,875	-102,254	-36,019	-44,972
Manitoba	-13,093	-9,549	-3,250	-4,308
Saskatchewan	-10,975	-7,975	-2,704	-3,534
Alberta	-54,442	-39,719	-13,308	-18,504
British Columbia	-66,517	-48,433	-17,808	-19,892
Territories	-1,248	-914	-460	-293
Canada	-388,469	-283,567	-98,542	-125,768

Source: The Conference Board of Canada.

Table 18 shows the average annual employment supported by the tourism sector from 2022 through to 2025.

**Table 18**  
**Impact of COVID-19 on Tourism Sector Employment in Canada**  
(Average annual jobs)

	2022	2023	2024	2025
Newfoundland and Labrador	19,159	19,816	19,946	20,106

Prince Edward Island	7,131	7,716	7,971	8,114
Nova Scotia	45,554	47,438	47,792	47,935
New Brunswick	29,866	31,021	31,261	31,347
Quebec	372,881	390,305	395,587	399,581
Ontario	651,873	684,535	696,178	704,759
Manitoba	60,600	63,421	64,343	65,186
Saskatchewan	50,077	52,486	53,246	53,881
Alberta	253,898	266,481	270,845	274,379
British Columbia	302,766	320,691	328,421	333,137
Territories	5,917	6,349	6,562	6,644
Canada	1,799,645	1,889,986	1,921,776	1,944,621

Source: The Conference Board of Canada.

Table 19 isolates the impact of COVID-19 on annual projections from 2022 to 2025 relative to the pre-COVID-19 (2019) estimates. Overall, it is projected that employment in the tourism sector will rebound to 2019 levels by 2023. Some industries, like accommodation, are projected to take an extra year.

**Table 19**  
**Tourism Sector Employment Estimates for 2022-2025**  
(Difference in the number of annual jobs, relative to 2019)

	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Newfoundland and Labrador	-841	-184	-54	105
Prince Edward Island	-440	145	400	543
Nova Scotia	-1,871	13	368	510
New Brunswick	-1,198	-43	197	283
Quebec	-15,580	1,845	7,127	11,121
Ontario	-28,723	3,939	15,582	24,163
Manitoba	-2,328	493	1,415	2,257
Saskatchewan	-2,014	394	1,154	1,790
Alberta	-10,614	1,969	6,333	9,867
British Columbia	-16,338	1,587	9,317	14,033
Territories	-359	73	286	368
Canada	-80,383	9,958	41,748	64,593

Source: The Conference Board of Canada.

## COVID-19 Impact on Sector Revenues

Statistics Canada's National Tourism Indicators (NTI) indicate that during 2019, the combined tourism and associated non-tourism demand in Canada amounted to just over \$261 billion. Of that, approximately \$105 billion came from tourists (domestic and international), with the balance coming from non-tourism (local) sources.

Where possible, the associated impacts of COVID-19 on tourism industry employment (shown in previous sections) were used to estimate the impact of COVID-19 on tourism industry revenues. Where gaps existed<sup>2</sup>, proxy relationships were established to identify reasonable estimates. Table 20 shows the actual and projected revenues for the tourism sector between 2019 and 2021.

**Table 20**  
**Tourism and Associated Non-Tourism Demand in Canada**  
(\$2019 millions)

	2019	2020	2021
Transportation*	113,590	63,787	100,346
Air transportation	27,470	11,987	23,484
Rail transportation	443	195	382
Other transportation	85,677	51,605	76,481
Accommodation	17,400	7,320	14,871
Food and beverage services	80,742	43,958	68,813
Recreation and entertainment	23,371	12,948	19,781
Travel services	4,916	1,538	4,151
Other (Non-tourism industries)*	21,187	8,579	16,839
<b>TOTAL DEMAND*</b>	<b>261,206</b>	<b>138,131</b>	<b>224,801</b>

Source: The Conference Board of Canada.

Table 21 shows the projected revenues for the tourism sector between 2022 and 2025. As with employment levels, overall, the combined revenues for the sector are projected to rebound to 2019 real levels by 2023. Again, some industries, like accommodation, are projected to take an extra year.

**Table 21**  
**Tourism and Associated Non-Tourism Demand in Canada**  
(\$2019 millions)

<sup>2</sup> Employment in the tourism sector only covers tourism industries and does not align with retail and other industries that tourism spending directly impacts.

	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Transportation*	108,594	114,317	116,312	117,733
Air transportation	25,823	27,516	28,153	28,508
Rail transportation	409	441	455	464
Other transportation	82,362	86,360	87,704	88,761
Accommodation	16,068	17,244	17,723	17,984
Food and beverage services	77,928	81,379	82,498	83,388
Recreation and entertainment	22,433	23,512	23,909	24,216
Travel services	4,575	4,920	5,067	5,146
Other (Non-tourism industries)*	20,130	21,281	21,714	21,994
<b>TOTAL DEMAND*</b>	<b>249,727</b>	<b>262,653</b>	<b>267,223</b>	<b>270,461</b>

Source: The Conference Board of Canada.



# Appendix A: NAICS Industries Included in the Tourism Sector

## 1. Transportation

### 1.1 Air transportation

4811 Scheduled air transport  
4812 Non-scheduled air transport

### 1.2 All other transportation industries

#### 4821 Rail transportation

##### **Tourism sub-industries**

482114 Passenger rail transportation

##### **Non-tourism sub-industries**

482112 Short-haul freight rail transportation

482113 Mainline freight rail transportation

4831 Deep sea, coastal, and Great Lakes water transportation

4832 Inland water transportation

4851 Urban transit systems

4852 Interurban and rural bus transportation

4853 Taxi and limousine service

4854 School and employee bus transportation

4855 Charter bus industry

4859 Other transit and ground passenger transportation

4871 Scenic and sightseeing transportation, land

4872 Scenic and sightseeing transportation, water

4879 Scenic and sightseeing transportation, other

5A0510 Automotive equipment rental and leasing

##### **Tourism sub-industries**

532111 Passenger car rental

532120 Truck, utility trailer and RV (recreational vehicle) rental and leasing

##### **Non-tourism sub-industries**

532112 Passenger car leasing

## 2. Accommodation

7211 Traveller accommodation

721A RV (recreational vehicle) parks and recreational camps

##### **Tourism sub-industries**

721211 RV (recreational vehicle) parks and campgrounds

721212 Hunting and fishing camps

721213 Recreational (except hunting and fishing) and vacation camps

##### **Non-tourism sub-industries**

721310 Rooming and boarding houses

### 3. Food and beverage services

7220 Food services and drinking places

**Tourism sub-industries**

72211 Full-service restaurants

72221 Limited-service eating places

72241 Drinking places (alcoholic beverages)

**Non-tourism sub-industries**

72231 Food service contractors

72232 Caterers

72233 Mobile food services

### 4. Recreation and entertainment

51213 Motion picture and video exhibition

7110 Performing arts, spectator sports, and related industries

**Tourism sub-industries**

7111 Performing arts companies

7112 Spectator sports

7115 Independent artists, writers and performers

**Non-tourism sub-industries**

7113 Promoters (presenters) of performing arts, sports and similar events

7114 Agents and managers for artists, athletes, entertainers and other public figures

7121 Heritage institutions

713A Amusement and recreation industries

7131 Amusement parks and arcades

7132 Gambling industries

7139 Other amusement and recreation industries

**Tourism sub-industries**

71391 Golf courses and country clubs

71392 Skiing facilities

71393 Marinas

71395 Bowling centres

71399 All other amusement and recreation industries

**Non-tourism sub-industries**

71394 Fitness and recreational sports centres

### 5. Travel services

5615 Travel arrangement and reservation services

# Appendix B: NOC-S Classification for Occupations in the Tourism Sector

## Accommodation

Accommodation service managers (A222)  
Program leaders and instructors in recreation, sport, and fitness (F154)\*  
Chefs (G411)  
Cooks (G412)\*  
Bartenders (G512)\*  
Food and beverage servers (G513)\*  
Hotel front desk clerks (G715)\*  
Light duty cleaners (G931)  
Janitors, caretakers, and building superintendents (G933)  
Food counter attendants, kitchen helpers, and related occupations (G961)\*  
All other occupations in accommodation

## Air transportation

Air pilots, flight engineers, and flying instructors (C171)  
Pursers and flight attendants (G712)  
Airline sales and service agents (G713)  
Aircraft mechanics and aircraft inspectors (H415)  
Air transport ramp attendants (H737)  
All other air transportation occupations

## All other transportation

Transportation managers (A373)  
Railway and yard locomotive engineers (H721)  
Railway conductors and brakemen/women (H722)  
Retail salespersons and sales clerks (G211)\*  
Motor vehicle mechanics, technicians, and mechanical repairers (H421)  
Bus drivers and subway and other transit operators (H712)  
Taxi and limousine drivers and chauffeurs (H713)  
All other transportation occupations (excl. air)

## Food and beverage services

Restaurant and food service managers (A221)  
Food service supervisors (G012)\*  
Cashiers (G311)\*  
Chefs (G411)  
Cooks (G412)\*  
Maîtres d'hôtel and hosts/hostesses (G511)\*  
Bartenders (G512)\*  
Food and beverage servers (G513)\*  
Bakers (G942)\*  
Food counter attendants, kitchen helpers, and related occupations (G961)\*  
Delivery drivers (H714)\*  
All other food and beverage occupations

## **Recreation and entertainment**

Recreation and sport program and service directors (A343)  
Technical occupations related to museums and art galleries (F112)\*  
Program leaders and instructors in recreation and sport (F154)\*  
Retail salespersons and sales clerks (G211)\*  
Cashiers (G311)\*  
Security guards and related occupations (G631)\*  
Casino occupations (G723)  
Attendants in amusement, recreation, and sport (G731)\*  
Janitors, caretakers and building superintendents (G933)  
Food counter attendants, kitchen helpers, and related occupations (G961)\*  
Landscaping and grounds maintenance labourers (I212)\*  
All other recreation and entertainment occupations

## **Travel Services**

Retail trade managers (A211)  
Travel counsellors (G711)  
All other travel services occupations

# Where insights meet impact

