

Tourism **HR**
Canada



RH Tourisme
Canada



SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

Provincial Report Series: Alberta



Prepared for:

Tourism HR Canada

Prepared by:

Qatalyst Research Group

Published February 2023

By Tourism HR Canada

ISBN 978-1-55304-784-1

Copyright ©2023

Tourism HR Canada.

All Rights Reserved.

Cover photo credit:

© Destination Canada

Tourism HR Canada

4-71 Bank Street

Ottawa, ON

K1P 5N2

Canada

tourismhr.ca

research@tourismhr.ca

Tourism HR Canada is a pan-Canadian organization with a mandate aimed at building a world-leading tourism workforce. It facilitates, coordinates, and enables human resource development activities which support a globally competitive and sustainable industry and foster the development of a dynamic and resilient workforce.

Tourism HR Canada is recognized as a global leader in setting occupational standards, building competency frameworks, developing occupational training and certification programs, conducting research into the tourism labour market, and analyzing the resulting data to plan and implement HR strategies for the industry.

Tourism HR Canada supplies tourism stakeholders with the labour market intelligence they need to plan for and overcome their current and future human resource challenges.

For more information, email research@tourismhr.ca or visit tourismhr.ca.

The word "Canada" in a serif font, with a small Canadian flag (red maple leaf) positioned above the letter 'a'.

Funded by the Government of Canada.

The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.

CONTENTS

INTRODUCTION.....	1
Background	1
Series of Provincial Tourism Labour Market Reports	1
Overview of the Alberta Tourism Sector	2
1. CURRENT LABOUR MARKET	4
Employment and Unemployment in the Tourism Sector.....	4
Demographic Characteristics	5
Employment Status and Wages	7
Years of Experience	8
Leading Occupations.....	10
2. IMPACT OF THE PANDEMIC.....	14
Changes in the Level of Employment.....	14
Impact By Employee Segment	15
Changes in Hours and Wages	17
Changes in Employment By Occupational Group.....	18
Changes in the Number of Active Businesses.....	21
Data on Where Employees Went	21
3. LABOUR MARKET OUTLOOK	24
Projected Employment.....	24
Employment By Occupation	25

FIGURES

Figure 1: Total Labour Force and Unemployment Rate, Alberta Tourism by Industry and Sector, 2022	4
Figure 2: Workforce Gender by Industry and Sector, 2022	5
Figure 3: Industry and Sector Workforce by Age Groups, 2022.....	6
Figure 4: Workforce Education Level by Industry and Sector, 2022	6
Figure 5: Workforce Immigration Status by Industry and Sector, 2022.....	7
Figure 6: Job Status by Industry and Sector, 2022	7
Figure 7: Employee Type by Industry and Sector, 2022	8
Figure 8: Average Hours Worked and Wages by Industry and Sector, 2022.....	8
Figure 9: Employment: Alberta Tourism Sector, 2012 – 2022.....	14
Figure 10: Monthly Decline in Tourism Employment, 2022 vs. 2019	14
Figure 11: Sales Revenue of Alberta’s Food Services and Drinking Places.....	20
Figure 12: Avg Monthly Business Opening and Closures, Alberta’s Tourism Sector (2019-2022)	21
Figure 13: Alberta Tourism Projected 5-year compounded annual growth rates - Top 15 Occupations	25

TABLES

Table 1: Employment in the Alberta Tourism Industry and Sector, 2022	4
Table 2: Alberta Tourism Sector vs Total Employment, 2022	5
Table 3: Tourism Industry and Sector Workforce Experience, 2022.....	9

Table 4: Leading Occupations in Alberta’s Tourism Industry Workforce, 2022	11
Table 5: Employment by Sector, 2019-2022	15
Table 6: Employment by Demographics, 2019-2022	15
Table 7: Tourism Sector Employment by Workforce Experience (2019-2022).....	17
Table 8: Alberta Tourism Average Actual Hours Worked Per Week Per Employee (2019-2022).....	17
Table 9: Average Hourly Wage in Alberta’s Tourism by Industry and Sector (2019-2022)	18
Table 10: Employment of Leading Occupations in Alberta’s Tourism Sector (2019-2022)	19
Table 11: Year to Year Employment by Industry and Sector, Alberta (2019-2022)	22
Table 12: Projected Growth Rates in Alberta’s Tourism Sector by Industry (2021-2025)	24

INTRODUCTION

BACKGROUND

Prior to the COVID-19 pandemic, tourism was a significant and growing source of employment across all regions of the province. However, employment declined sharply beginning in April 2020. As evidenced in recent surveys and confirmed in the daily news, the sector is now facing significant staff shortages as we emerge from the pandemic. Many employees left for other sectors or left the workforce altogether, and the sector has faced strong competition in attracting new workers.

There is continued uncertainty regarding future labour market demand and skills requirements for the sector. Requirements could vary widely depending on factors such as the potential waves of COVID-19, the continuing strength of pent-up demand for travel, on-going changes in the characteristics of markets, business practices and technology, environmental considerations, the labour market supply, among others. The sector must continue to be nimble and responsive to changing conditions. Given this dynamic situation, access to labour market intelligence and other sectoral supports have never been more important.

SERIES OF PROVINCIAL TOURISM LABOUR MARKET REPORTS

This report represents one of a series of reports prepared on the tourism labour market. The series includes a report for each province as well as a national report. This report, which focuses on Alberta, is divided into three chapters which align with the following research questions:

- 1. What is the current status of the tourism sector labour market?** Chapter 1 provides information on Alberta's tourism sector total labor force and unemployment rates, demographics, attachment to the tourism workforce, and leading occupations.
- 2. What impact did COVID-19 have on the tourism sector labour market?** Chapter 2 provides information on how the pandemic impacted employment by sector, employee characteristics, hours worked and wages.
- 3. What is the outlook for the tourism sector labour market?** Chapter 3 provides projections regarding employment in Alberta's tourism industry by sector and leading occupations.

The report draws on information from Statistics Canada's Labour Force Survey, from surveys and reports commissioned by Tourism HR Canada including employment projections developed by the Conference Board of Canada.

OVERVIEW OF THE ALBERTA TOURISM SECTOR

Alberta's tourism sector is comprised of companies which provide accommodation, food and beverage services, recreation and entertainment, transportation, and travel services. Alberta contains a large portion of the Rocky Mountains and most tourism to the province centers around visiting the surrounding parks.¹ Calgary and Edmonton are the province's two main cities and Calgary, is generally acknowledged to contain more to see and do, though Edmonton contains a few famous attractions, as well.²

Alberta is a top travel destination in Canada. There was a total of 34.6 million person-visits in 2019 with 28.9 million from Alberta, 3.6 million from other parts of Canada, 1.2 million from the United States and 1.2 million from overseas.³ Alberta saw a total of \$10.1 billion in tourism expenditures. In 2019, tourism spending by visitors contributed to the provincial economy with 82,000 jobs, \$8.4 billion in contribution to Alberta's GDP and \$1.3 billion in contribution from taxes on products and services.⁴ Nearly 10% of the province's jobs are attributed to tourism-related business activities.⁵ The tourism industry in Alberta was significantly impacted by the COVID-19 pandemic.⁶ Tourism employment declined since the pandemic. In February 2020, there were 250,000 people employed by the tourism sector in Alberta. During the first two months of the pandemic, employment fell by 115,000. Although monthly employment has risen and is higher in 2022 and 2021 than in 2020, it still remains below pre-pandemic levels.⁷

A growing area of the Alberta tourism sector is Indigenous tourism. Indigenous tourism encourages and promotes authentic tourism that showcases the unique and immersive experiences offered throughout the four regions of Alberta including North, Central, Southern Alberta and the Rockies. Examples include annual Métis week celebrations, Frog Lake historic site and Indigenous heritage section.⁸ To support this growing industry as it recovers from the effects of the pandemic, on March 9, 2022, the Federal Government announced over \$1.3 million in federal funding to help Indigenous tourism organizations build resiliency, increase safety for visitors and develop new experiences to showcase Alberta as a premier Indigenous tourism destination.⁹

¹ <https://thecanadaguide.com/places/canadian-tourism/alberta-tourism/>

² Ibid.

³ <https://www.alberta.ca/Alberta-visitor-profiles.aspx/>

⁴ Ibid.

⁵ <https://www.tiaalberta.ca/cpages/impact>

⁶ <https://calgary.ctvnews.ca/survey-of-alberta-s-tourism-industry-pinpoints-greatest-recovery-challenges-1.5875105>

⁷ <https://indigenoustourismalberta.ca/industry/tourism-labour-trends-dashboard/>

⁸ <https://www.alberta.ca/indigenous-cultures.aspx>

⁹ Prairies Economic Development Canada. (2022). Government of Canada makes key investments to boost Tourism in Alberta <https://www.canada.ca/en/prairies-economic-development/news/2022/03/government-of-canada-makes-key-investments-to-boost-tourism-in-alberta.html>

This series of workforce profiles follows the Tourism Satellite Account's definition of the Tourism sector, in particular, the NAICs Codes that are used to define the accommodation sector. Those NAICs codes are:

- Accommodation:
 - 7211 Traveller accommodation
 - 7212 Recreational vehicle (RV) parks and recreational camps
- Food and Beverage Services:
 - 7224 Drinking places (alcoholic beverages)
 - 7225 Full-service restaurants and limited service eating places
- Recreation and Entertainment:
 - 5121 Motion picture and video exhibition
 - 7111 Performing arts companies
 - 7112 Spectator sports
 - 7115 Independent artists, writers and performers
 - 7121 Heritage institutions
 - 7131 Amusement parks and arcades
 - 7132 Gambling industries
 - 7139 Other amusement and recreation industries
- Transportation
 - 4811 Scheduled air transport
 - 4812 Non-scheduled air transport
 - 4821 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
 - 5321 Automotive equipment rental and leasing
- Travel Services
 - 5615 Travel arrangement and reservation services



Note: Any business is assigned to only one NAICs code, corresponding to the industry classification from which it generates its greatest revenues. NAICs Codes can be found at the following link:
<https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=380372>

1. CURRENT LABOUR MARKET

EMPLOYMENT AND UNEMPLOYMENT IN THE TOURISM SECTOR

Alberta's tourism sector employed an average of 217,944 employees through the first nine months of 2022, of whom 51% were employed in food and beverage services and 25% in recreation and entertainment, 16% in transportation, 7% in accommodation and 1% in the travel services industry.

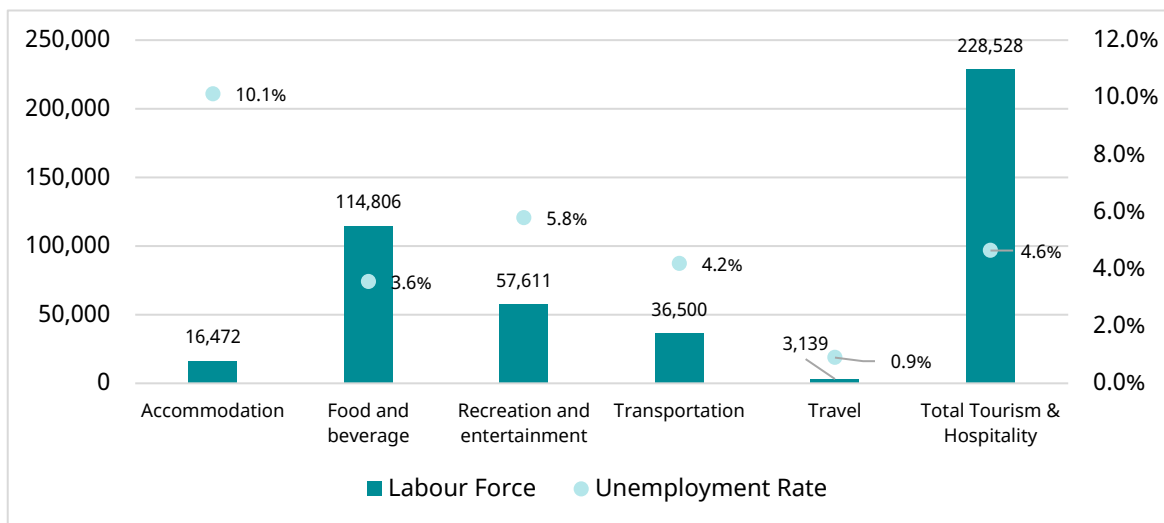
Table 1: Employment in the Alberta Tourism Industry and Sector, 2022

Industry	Alberta	
	#	%
Accommodation	14,806	7%
Food and beverage services	110,722	51%
Recreation and entertainment	54,278	25%
Transportation	34,972	16%
Travel services	3,111	1%
Tourism Sector Total	217,944	100%

Source: Statistics Canada, Labour Force Survey (LFS) via Real Time Remote Access.

Including both employed and unemployed individuals (i.e., those whose most recent job was in tourism), the labor force for the tourism sector averaged 228,528 through the first nine months of 2022. Unemployment averaged 4.6%.

Figure 1: Total Labour Force and Unemployment Rate, Alberta Tourism by Industry and Sector, 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

* Note: Each of the tables and charts in this report uses shortened forms to refer to the Food and beverage services and the Travel services industry groups.

The Alberta tourism sector accounts for approximately 9% of the total employment in Alberta, slightly lower than the national tourism industry average of 10%.

Table 2: Alberta Tourism Sector vs Total Employment, 2022

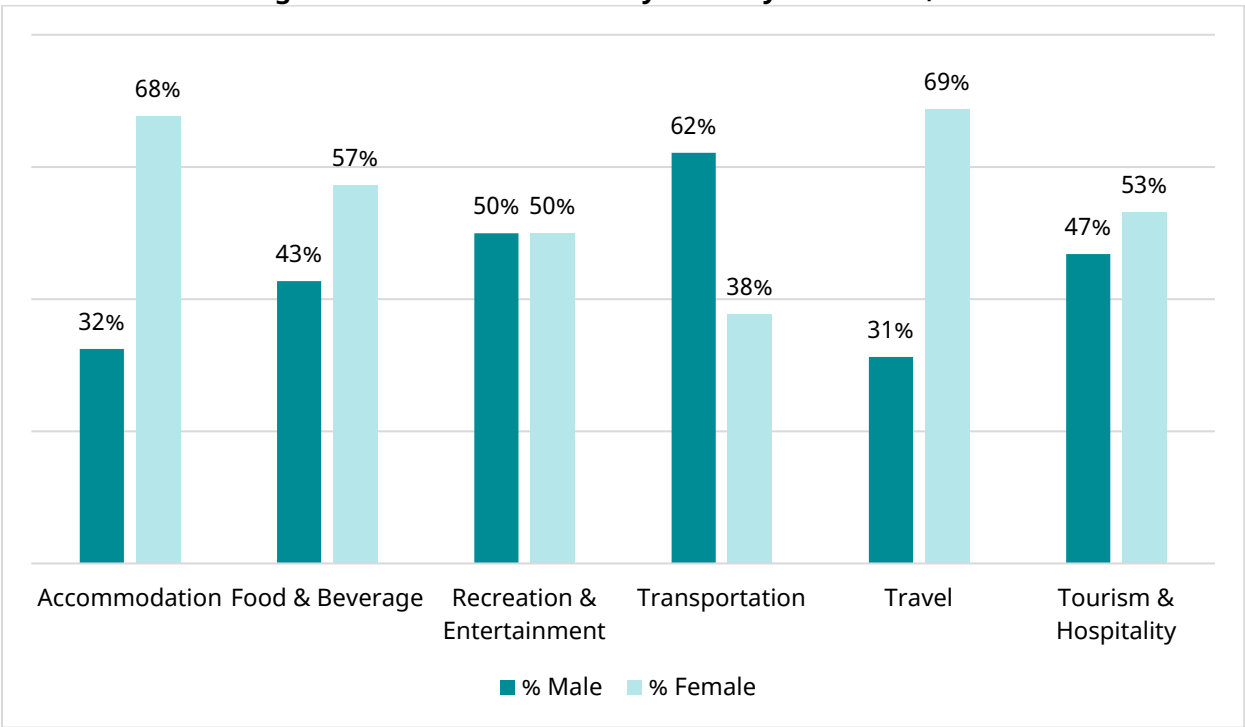
Employment	Alberta	Canada
Tourism	217,944	1,859,806
Overall Employment	2,346,889	19,523,917
Percent Tourism of Overall Employment	9.3%	9.5%

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

DEMOGRAPHIC CHARACTERISTICS

The workforce is relatively evenly divided in terms of gender. The transportation industry has the highest concentration of male workers (62%) while the travel services industry has the highest concentration of female workers (69%).

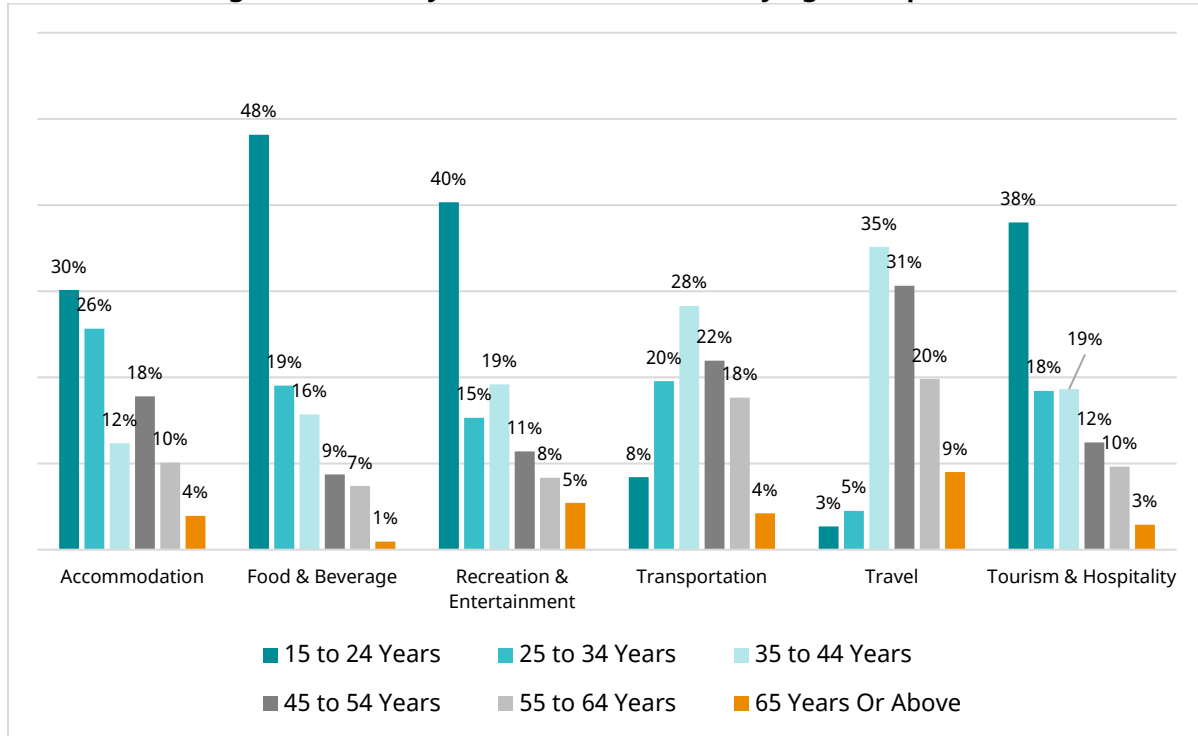
Figure 2: Workforce Gender by Industry and Sector, 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

The food and beverage services industry has the youngest workforce with 48% of its workers being between 15 and 24 years of age, while travel services is the oldest with 29% of its workers being 55 years or older. Approximately 56% of the workforce is under the age of 35.

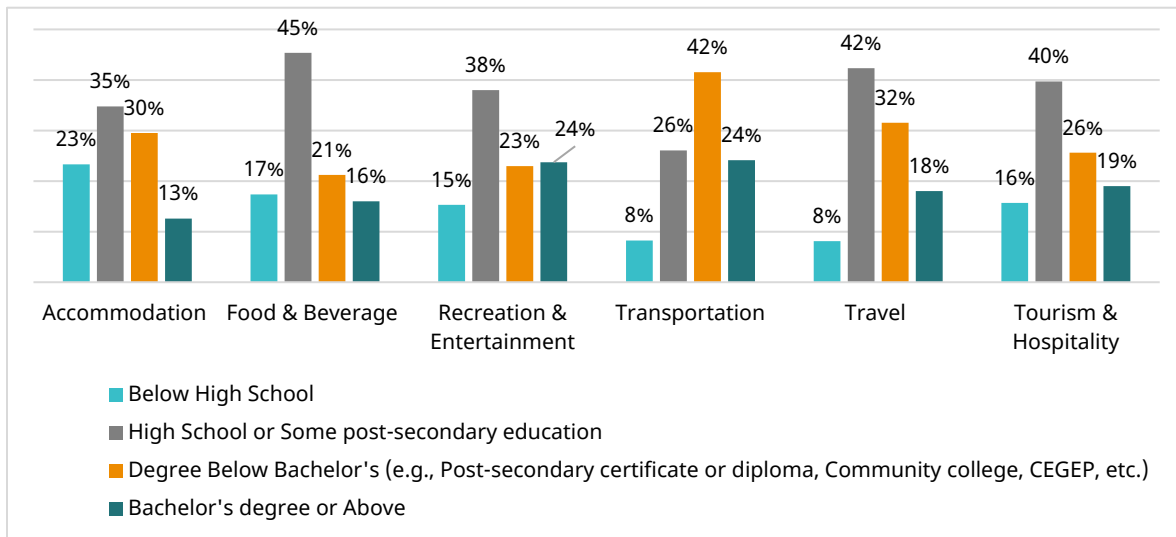
Figure 3: Industry and Sector Workforce by Age Groups, 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

Approximately 45% of the workforce have a post-secondary diploma or higher. The travel services industry has the highest percentage of workers with a post-secondary education or higher.

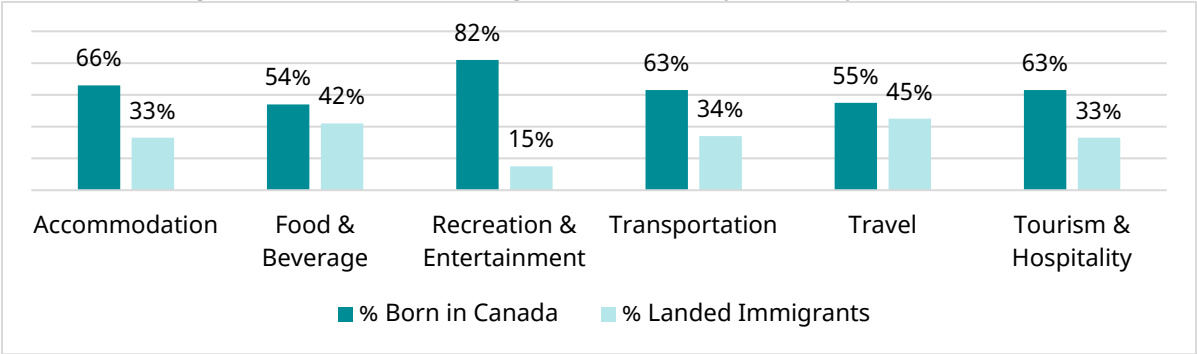
Figure 4: Workforce Education Level by Industry and Sector, 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

In 2022, 63% of the tourism services workforce were born in Canada, whereas 33% are landed immigrants. The majority of the workforce who were born in Canada work in the recreation and entertainment industry while the majority of landed immigrants work in the travel services industry.

Figure 5: Workforce Immigration Status by Industry and Sector, 2022

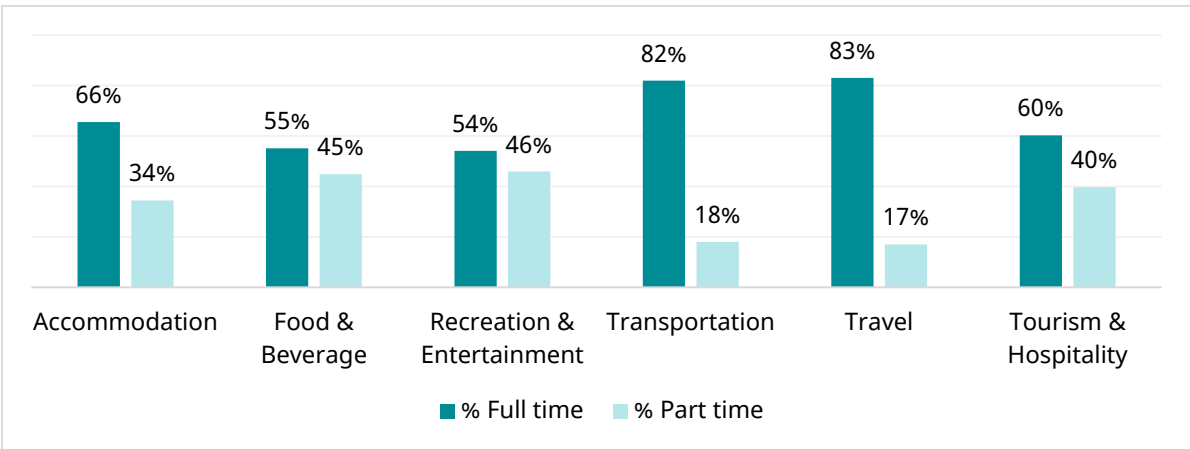


Source: THRC Employment Tracker, LFS Statistics Canada.

EMPLOYMENT STATUS AND WAGES

Approximately 60% of the provincial workforce is employed on a full-time basis and 40% is employed part-time. The travel services industry has the highest percentage of full-time workers (83%) while the recreation and entertainment services industry has the highest percentage of part-time workers (46%).

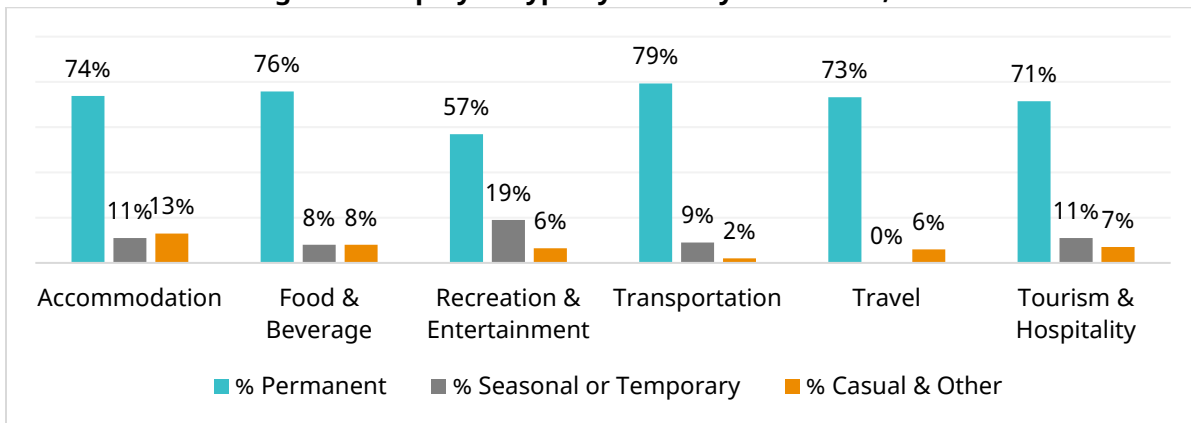
Figure 6: Job Status by Industry and Sector, 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

Permanent workers account for 71% of the workforce, while 18% are seasonal, temporary, or casual workers (the remaining 11% of the workers have an unknown status in the Labour Force Survey). The transportation industry has the highest percentage of permanent employees (79%), whereas the recreation and entertainment industry have the highest percentage of seasonal employees (19%).

Figure 7: Employee Type by Industry and Sector, 2022

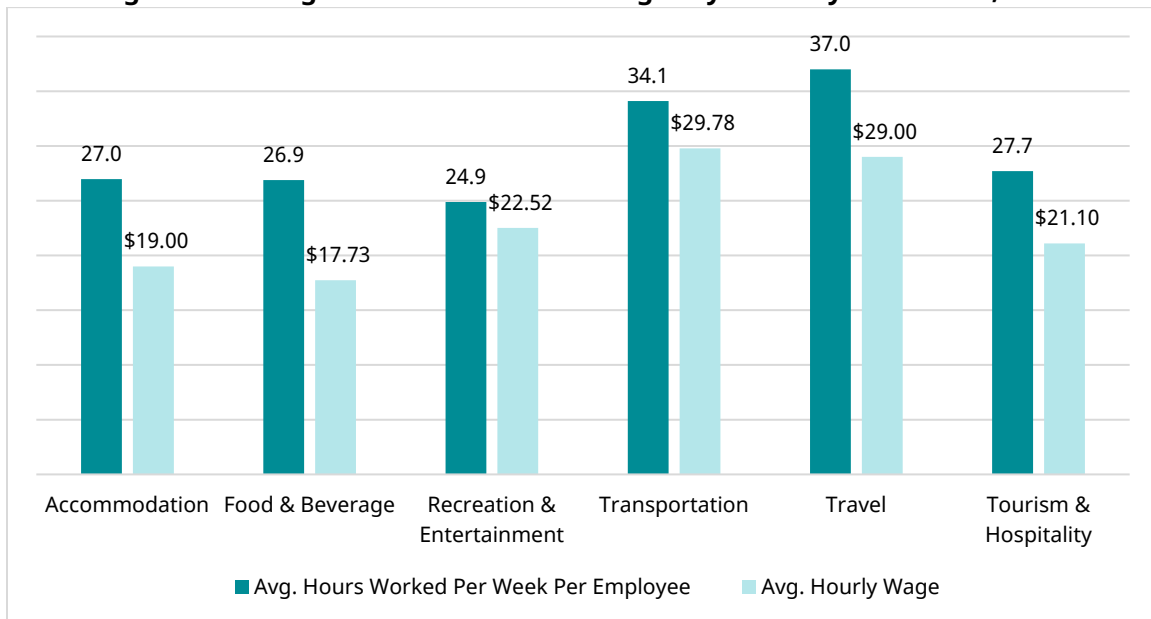


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

*Note: The percentages in the table do not equal 100% because a portion of the employees' work status is unknown in the dataset.

The average wage rate is \$21 per hour and the average hours worked per week is 28. Employees in travel services work the most hours per week (of 37 hours per employee) and employees in the transportation industry are paid the highest average hourly wage (\$29.72 per hour).

Figure 8: Average Hours Worked and Wages by Industry and Sector, 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access. Note: Wage includes tips and commissions.

YEARS OF EXPERIENCE

On average, members of the Alberta tourism sector workforce have been employed in their current positions for six years. In terms of industries, the travel services industry has the longest average length of employment of 10.9 years, while food and beverage services had the shortest average length of employment of 4.7 years.

Table 3: Tourism Industry and Sector Workforce Experience, 2022

Years of Employment	Accommodation		Food & Beverage services		Recreation & Entertainment		Transportation		Travel services		Tourism	
	#	%	#	%	#	%	#	%	#	%	#	%
Less than 1	3,639	25%	27,667	25%	9,306	17%	4,194	12%	278	9%	45,083	21%
1 to 2	4,111	28%	29,556	27%	13,58	25%	5,083	15%	694	22%	53,028	24%
2 to 4	1,667	11%	26,333	24%	12,028	22%	8,250	24%	278	9%	48,556	22%
5 to 7	2,861	19%	9,361	8%	6,722	12%	5,361	15%	361	12%	24,667	11%
8 to 10	1,139	8%	4,694	4%	4,472	8%	3,361	10%	306	10%	13,972	6%
11 to 15	667	4%	8,417	8%	3,222	6%	3,444	10%	278	9%	16,028	7%
16 to 20	361	2%	2,611	2%	2,667	5%	1,667	5%	639	21%	7,944	4%
Over 20	389	3%	2,056	2%	2,278	4%	3,611	10%	278	9%	8,611	4%
Total	14,806	100%	110,72	100%	54,27	100%	34,972	100%	3,111	100%	217,944	100%
<i>Avg. Length</i>	<i>4.9 years</i>		<i>4.7 years</i>		<i>6.4 years</i>		<i>8.5 years</i>		<i>10.9 years</i>		<i>5.8 years</i>	

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

LEADING OCCUPATIONS

Table 4 provides an overview of the leading occupations in various tourism industries in terms of common certifications or training/education requirements, the primary tourism industry in which those workers are employed, annual employment levels, and average wage rates. The transportation industry accounts for the occupations that have the highest average experience levels.

Table 4: Leading Occupations in Alberta's Tourism Industry Workforce, 2022

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
6711	Food counter attendants, kitchen helpers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	34,889	\$16.10	3.7
6513	Food and beverage servers	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	19,667	\$20.00	4.5
0631	Restaurant and food service managers	<ul style="list-style-type: none"> Completion of a college or other program related to hospitality or food and beverage service management Several years of experience in the food service sector including supervisory experience Responsible beverage service certification 	Food & Beverage services	15,306	\$27.00	9.5
6322	Cooks	<ul style="list-style-type: none"> Completion of a three-year apprenticeship program for cooks or completion of college or other program in cooking or food safety 	Food & Beverage services	15,250	\$17.80	4.4
5254	Program leaders and instructors in recreation, sport and fitness	<ul style="list-style-type: none"> College program in recreation or physical education Extensive sport related training Coaching and refereeing certificates 	Recreation & Entertainment	12,972	\$21.00	3.3
6611	Cashiers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	8,667	\$15.90	3.5
7512	Bus drivers, subway operators and other transit operators	<ul style="list-style-type: none"> Appropriate class driver's license Additional certifications such as First-Aid, Transportation of Dangerous Goods, and Air Brakes Endorsement 	Transportation	8,528	\$26.00	7.3
6311	Food service supervisors	<ul style="list-style-type: none"> Completion of a community college program in food service administration, hotel and restaurant management or related discipline, or equivalent job experience 	Food & Beverage services	7,694	\$18.00	5.9
6722	Operators and attendants in	<ul style="list-style-type: none"> On-the-job training 	Recreation & Entertainment	7,278	\$17.30	3.2

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
	amusement, recreation and sport					
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	6,500	\$15.50	2.4
6321	Chefs	<ul style="list-style-type: none"> Cook's trade certification or equivalent credentials, training and experience Chef's Red Seal Certification 	Food & Beverage services	6,278	\$19.00	4.8
6731	Light duty cleaners	<ul style="list-style-type: none"> On-the-job training Certification for housekeeping room attendants or similar certification 	Accommodation	5,306	\$17.50	4.6
6512	Bartenders	<ul style="list-style-type: none"> Responsible beverage service certification On-the-job training 	Food & Beverage services	4,806	\$19.20	3.7
7513	Taxi and limousine drivers and chauffeurs	<ul style="list-style-type: none"> Appropriate class driver's license Additional certifications such as First-Aid, Transportation of Dangerous Goods, and Air Brakes Endorsement 	Transportation	3,389	\$17.80	7.8
8612	Landscaping and grounds maintenance labourers	<ul style="list-style-type: none"> Provincial licence to apply chemical fertilizers, fungicides, herbicides, and pesticides 	Recreation & Entertainment	2,972	\$17.50	3.5
6533	Casino workers	<ul style="list-style-type: none"> On-the-job training Security clearance Casino gaming licences 	Recreation & Entertainment	2,444	\$19.80	3.2
6523	Airline ticket and service agents	<ul style="list-style-type: none"> Several weeks of on-the-job and classroom training Airline station agents Load planners require a restricted radio operator's licence and usually require airline operations experience 	Transportation	2,250	\$21.00	5.9
6733	Janitors, caretakers and building superintendents	<ul style="list-style-type: none"> Cleaning and maintenance experience A journeyman/woman certificate in one or more of the trades or a building operator 	Accommodation	1,778	\$22.00	6.9

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
		certificate may be required for building superintendents				
2271	Air pilots, flight engineers and flying instructors	Pilots and flight engineers <ul style="list-style-type: none"> ▪ A university degree or college diploma ▪ A commercial pilot's licence or an air transport pilot's licence ▪ Additional licences or endorsements to fly different types of aircraft ▪ Flight engineers require a flight engineer licence issued by Transport Canada Flight instructors <ul style="list-style-type: none"> ▪ A university degree or college diploma ▪ A commercial pilot's or an air transport pilot's licence ▪ Transport Canada ratings and endorsements to provide instructions 	Transportation	1,667	\$45.00	12.7
6552	Other customer and information services representatives	<ul style="list-style-type: none"> ▪ Completion of some college or other post-secondary programs ▪ Clerical or sales experience 	Transportation	1,389	\$18.80	6.4

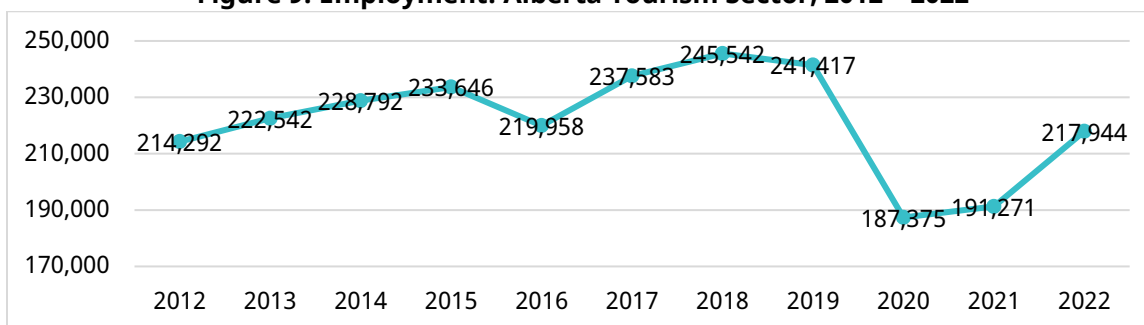
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

2. IMPACT OF THE PANDEMIC

CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 1.7% from 2012 to 2019, rising from an average of 214,292 employees per month in 2012 to 241,417 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (217,944 employees per month) remain below pre-pandemic levels.

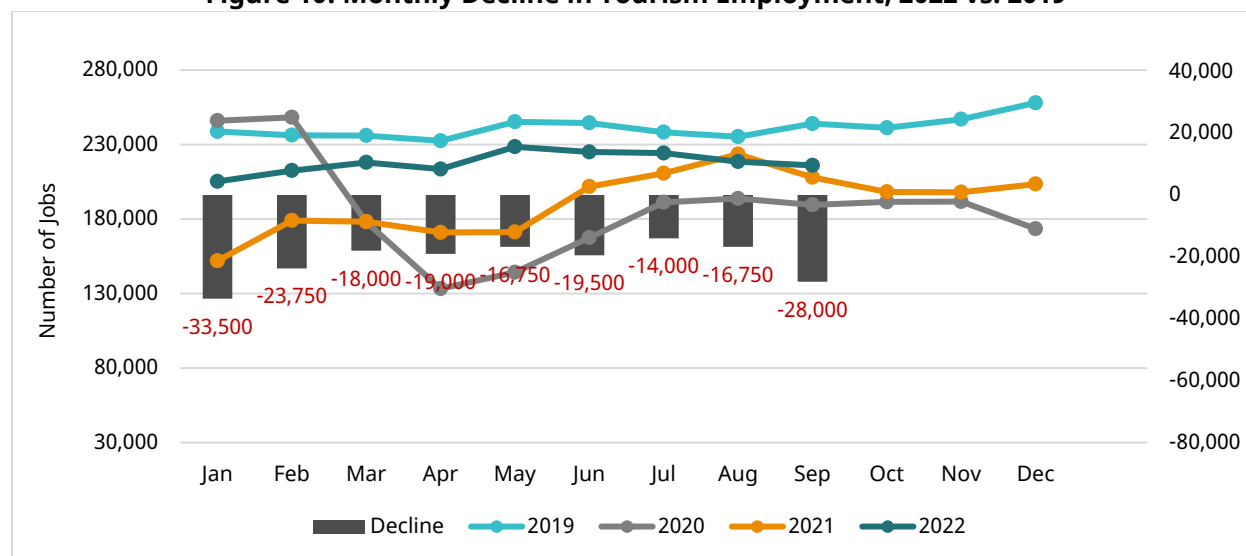
Figure 9: Employment: Alberta Tourism Sector, 2012 – 2022



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

The chart below compares average monthly employment from 2019 to 2022 and also calculates the difference between average monthly employment levels in 2019 and 2022. As indicated, since the onset of the pandemic employment levels have not surpassed levels experienced in 2019.

Figure 10: Monthly Decline in Tourism Employment, 2022 vs. 2019



Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

The impact of the pandemic on employment varies by industry. While overall employment in the tourism sector is down 10% in 2022 relative to 2019, the percentage varies from growth of 7% in recreation and entertainment to losses of 36% and 31% respectively in the accommodation and travel services industry.

Table 5: Employment by Sector, 2019-2022

Employment	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	23,292	16,833	13,438	14,806	-28%	-42%	-36%
Food and Beverage services	114,271	90,229	96,604	110,722	-21%	-15%	-3%
Recreation and Entertainment	50,646	47,667	39,688	54,278	-6%	-22%	7%
Transportation	48,688	30,875	39,188	34,972	-37%	-20%	-28%
Travel services	4,521	1,771	2,354	3,111	-61%	-48%	-31%
Total	241,417	187,375	191,271	217,944	-22%	-21%	-10%

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

IMPACT BY EMPLOYEE SEGMENT

Job losses did not impact all demographic groups equally in 2020. Casual workers, and those in the age groups 35-54 as well as the youngest (15 to 24 years, who tended to be the least experienced workers) were the most likely to be displaced. In 2020, this trend continued with those in the 55-64 group also seeing a large decrease in employment levels.

Table 6: Employment by Demographics, 2019-2022

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Job Status							
Full-time	154,000 (64%)	112,083 (60%)	113,458 (59%)	131,389 (60%)	-27%	-26%	-15%
Part-time	87,417 (36%)	75,292 (40%)	77,771 (41%)	86,556 (40%)	-14%	-11%	-1%
Permanent							
Permanent	178,667 (74%)	133,167 (71%)	142,292 (74%)	155,722 (71%)	-25%	-20%	-13%
Seasonal	11,479 (5%)	9,271 (5%)	8,042 (4%)	10,583 (5%)	-19%	-30%	-8%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Casual	15,104 (6%)	10,563 (6%)	8,458 (4%)	13,806 (6%)	-30%	-44%	-9%
Temporary	11,688 (5%)	8,542 (5%)	8,979 (5%)	12,306 (6%)	-27%	-23%	5%
Gender							
Male	119,229 (49%)	91,063 (49%)	92,729 (48%)	102,028 (47%)	-24%	-22%	-14%
Female	122,188 (51%)	96,313 (51%)	98,500 (52%)	115,889 (53%)	-21%	-19%	-5%
Age Group							
15 to 24	79,771 (33%)	59,083 (32%)	60,042 (31%)	82,778 (38%)	-26%	-25%	4%
25 to 34	49,063 (20%)	40,688 (22%)	42,417 (22%)	40,167 (18%)	-17%	-14%	-18%
35 to 44	42,000 (17%)	31,479 (17%)	33,354 (17%)	40,611 (19%)	-25%	-21%	-3%
45 to 54	37,771 (16%)	25,396 (14%)	27,979 (15%)	27,111 (12%)	-33%	-26%	-28%
55 to 64	25,563 (11%)	23,021 (12%)	19,042 (10%)	21,000 (10%)	-10%	-26%	-18%
65 or above	7,375 (3%)	7,729 (4%)	8,479 (4%)	6,306 (3%)	5%	15%	-14%
Education							
Below high school	33,479 (14%)	25,063 (13%)	26,542 (14%)	34,194 (16%)	-25%	-21%	2%
High school or some post-secondary	93,521 (39%)	76,229 (41%)	74,313 (39%)	86,500 (40%)	-18%	-21%	-8%
Degree below bachelor's	68,542 (28%)	44,750 (24%)	52,833 (28%)	55,806 (26%)	-35%	-23%	-19%
Bachelor's degree or above	45,958 (19%)	41,417 (22%)	37,604 (20%)	41,444 (19%)	-10%	-18%	-10%

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

There was a loss of experienced workers with over 20 years of experience. There was also a year-over-year reduction in employees with less 2 to 4 years experience.

Table 7: Tourism Sector Employment by Workforce Experience (2019-2022)

Length of Employment	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Less than 1 year	43,500	23,542	33,583	45,083	-46%	-23%	4%
1 year	52,500	38,125	24,813	53,028	-27%	-53%	1%
2 to 4 years	68,979	55,229	58,896	48,556	-20%	-15%	-30%
5 to 7 years	29,875	24,188	29,146	24,667	-19%	-2%	-17%
8 to 10 years	12,542	14,250	12,333	13,972	14%	-2%	11%
11 to 15 years	15,542	15,646	13,875	16,028	1%	-11%	3%
16 to 20 years	6,438	6,063	9,438	7,944	-6%	47%	23%
Over 20 years	12,125	10,417	9,271	8,611	-14%	-24%	-29%
Total	241,417	187,375	191,271	217,944	-22%	-21%	-10%
Avg. years	6.0	6.7	6.7	5.8	-	-	-

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

CHANGES IN HOURS AND WAGES

Employers reduced employee hours as a means to maintain staff throughout the pandemic. The average hours worked per week per employee declined by 13% in 2020. In 2022, the average hours worked is almost back to 2019 levels. Transportation and Travel services industries both have experienced an increase in average hours per week relative to 2019.

Table 8: Alberta Tourism Average Actual Hours Worked Per Week Per Employee (2019-2022)

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 2019	% Change 22 vs 19
Accommodation	30.0	30.1	30.0	27.0	0.3%	0%	-10%
Food and Beverage services	27.0	23.0	24.6	26.9	-15%	-9%	-0.4%
Recreation and Entertainment	27.8	22.6	28.9	24.9	-19%	4%	-10%
Transportation	33.9	32.0	32.0	34.1	-6%	-6%	1%
Travel services	30.0	27.0	31.0	37.0	-10%	3%	23%
Tourism Alberta	28.9	25.2	27.5	27.7	-13%	-5%	-4%

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

Overall, the average hourly wage in Alberta's tourism sector increased by 2% in 2021 and decreased by 4% in 2022 as compared to 2019. The average hourly wage decreased from \$21.92 in 2019 to 21.83 in 2020, increased to \$22.40 in 2021 and decreased again \$21.10 in 2022.

Table 9: Average Hourly Wage in Alberta's Tourism by Industry and Sector (2019-2022)

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	\$18.34	\$21.56	\$20.03	\$19.00	18%	9%	4%
Food and Beverage services	\$17.65	\$17.11	\$17.63	\$17.73	-3%	-0.1%	0.5%
Recreation and Entertainment	\$22.83	\$22.87	\$24.21	\$22.52	0.2%	6%	-1%
Transportation	\$32.67	\$34.50	\$34.50	\$29.78	6%	6%	-9%
Travel services	\$32.00	\$39.00	\$23.00	\$29.00	22%	-28%	-9%
Tourism Alberta	\$21.92	\$21.83	\$22.42	\$21.10	-0.4%	2%	-4%

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

CHANGES IN EMPLOYMENT BY OCCUPATIONAL GROUP

Occupations associated with the transportation and food and beverage services industries tended to experience the largest declines in employment from 2019 until 2022. The following table shows the change in employment of the leading occupations in the sector throughout the pandemic until now.

Table 10: Employment of Leading Occupations in Alberta's Tourism Sector (2019-2022)

NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	29,458	23,875	30,458	34,889	-19%	3%	18%
6513	Food and beverage servers	23,375	16,938	14,750	19,667	-28%	-37%	-16%
0631	Restaurant and food service managers	11,854	9,396	11,375	15,306	-21%	-4%	29%
6322	Cooks	22,917	16,271	15,000	15,250	-29%	-35%	-33%
5254	Program leaders and instructors in recreation, sport and fitness	10,021	6,563	5,750	12,972	-35%	-43%	29%
6611	Cashiers	7,229	7,063	7,979	8,667	-2%	10%	20%
7512	Bus drivers, subway operators and other transit operators	12,333	9,438	10,063	8,528	-23%	-18%	-31%
6311	Food service supervisors	7,792	8,333	8,104	7,694	7%	4%	-1%
6722	Operators and attendants in amusement, recreation and sport	7,646	7,438	4,604	7,278	-3%	-40%	-5%
6511	Maîtres d'hôtel and hosts/hostesses	8,875	6,333	4,583	6,500	-29%	-48%	-27%
6321	Chefs	8,042	4,500	5,042	6,278	-44%	-37%	-22%
6731	Light duty cleaners	5,208	3,583	2,604	5,306	-31%	-50%	2%
6512	Bartenders	6,583	2,458	3,042	4,806	-63%	-54%	-27%
7513	Taxi and limousine drivers and chauffeurs	5,875	4,458	4,271	3,389	-24%	-27%	-42%
8612	Landscaping and grounds maintenance labourers	2,104	2,104	2,021	2,972	0%	-4%	41%
6523	Airline ticket and service agents	2,625	458	333	2,250	-83%	-87%	-14%
6733	Janitors, caretakers and building superintendents	1,104	2,063	1,250	1,778	87%	13%	61%
2271	Air pilots, flight engineers and flying instructors	2,333	1,708	2,271	1,667	-27%	-3%	-29%
6552	Other customer and information services representatives	688	375	1,229	1,389	-45%	79%	102%

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

The trend in food & beverage services employment is closely correlated with changes in food and beverage revenues. During the height of the pandemic, it is likely that most operations experienced a sharper decline in revenues than in employment. Most operations require a certain number of staff members to be able to open and operate. If revenues declined by 30%, that did not necessarily mean that the operation reduced its staffing levels by 30%. The result is that the average revenue per employee declined. Further complicating these factors is the addition of new staffing requirements during the pandemic to maintain health and safety standards.

The following chart compares monthly food service and drinking places' revenues from December 2019 to Aug. 2022 reported by Statistics Canada on employment levels for the food and beverage services industry reported through the Labour Force Survey. The data suggests employment levels recovered more quickly in 2020 than did revenues, even though many operations were able to increase prices somewhat during the pandemic. By June of 2022, the growth of the revenues surpassed the growth of the food and beverage services industry employment levels – setting a new standard post-pandemic.

Figure 11: Sales Revenue of Alberta's Food Services and Drinking Places

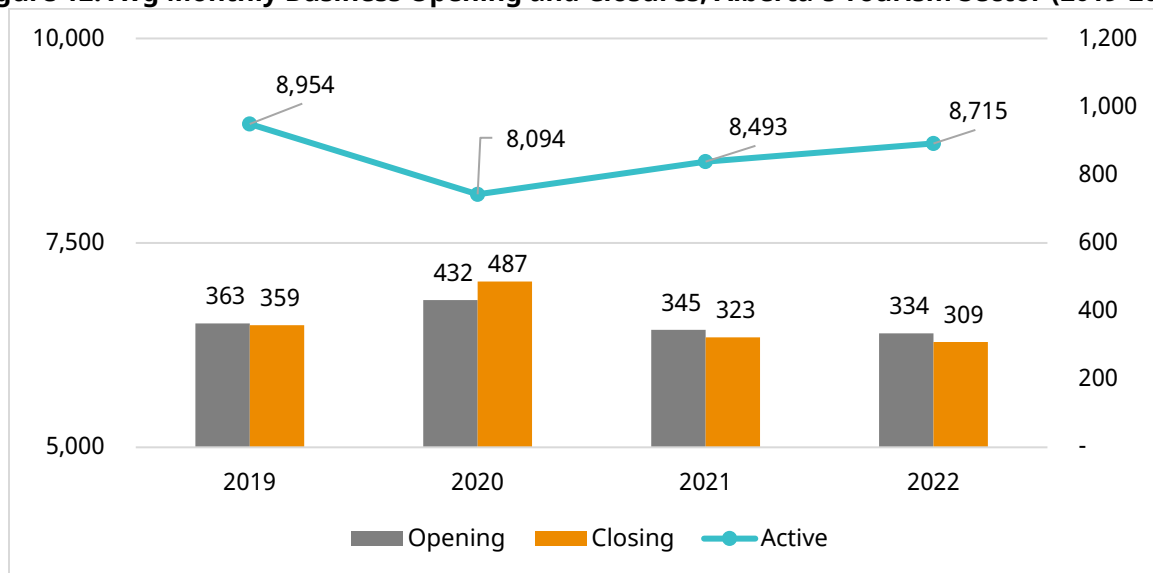


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01
Monthly survey of food services and drinking places (x 1,000)

CHANGES IN THE NUMBER OF ACTIVE BUSINESSES

Statistics Canada defines business openings as businesses with employment in the current month and no employment in the previous month, while business closures are defined as businesses that had employment in the previous month, but no employment in the current month. Active businesses are defined as those businesses that reported having one or more employees in a given month. During the pandemic, the tourism sector not only saw a decline in employment, but also a decline in the number of active businesses. The number of active tourism businesses declined from 8,954 in 2019 to 8,094 in 2020 before recovering to 8,715 in 2022.

Figure 12: Avg Monthly Business Opening and Closures, Alberta's Tourism Sector (2019-2022)



Source: THRC Employment Tracker/Statistics Canada.

DATA ON WHERE EMPLOYEES WENT

A recent Prudential Finance study found that about 22% of workers changed their jobs or careers during the pandemic.¹⁰ That said, there is limited data available as to which sector these departing employees went. It is likely that most of these workers moved to other sectors which were growing in 2021, particularly in retail as indicated in the table below.

¹⁰ Pulse of the American Worker Survey: A Third Year Begins — Life and Work in the Pandemic Era.

Table 11: Year to Year Employment by Industry and Sector, Alberta (2019-2022)

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	23,292	16,833	13,438	14,806	-6,459	-3,395	1,368
Food and Beverage services	114,271	90,229	96,604	110,722	-24,042	6,375	14,118
Recreation and Entertainment	50,646	47,667	39,688	54,278	-2,979	-7,979	14,590
Transportation	48,688	30,875	39,188	34,972	-17,813	8,313	-4,216
Travel services	4,521	1,771	2,354	3,111	-2,750	583	757
Sector Totals	241,417	187,375	191,271	217,944	-54,042	3,896	26,673
Accommodation and food services (non-tourism)	6,042	5,896	3,958	8,722	-146	-1,938	4,764
Administrative and support, waste management and remediation services	76,125	68,625	69,979	71,361	-7,500	1,354	1,382
Agriculture, forestry, fishing and hunting	52,792	47,688	38,042	44,000	-5,104	-9,646	5,958
Arts, entertainment and recreation (non-tourism)	2,042	1,958	1,021	1,944	-83	-938	924
Construction	231,083	214,063	222,208	226,722	-17,021	8,146	4,514
Educational services	152,917	147,417	168,938	159,750	-5,500	21,521	-9,188
Finance and insurance	59,479	68,688	72,833	74,222	9,208	4,146	1,389
Health care and social assistance	285,229	289,188	302,771	313,833	3,958	13,583	11,063
Information and cultural industries	21,500	21,521	24,104	24,889	21	2,583	785
Manufacturing	135,354	125,896	122,250	124,194	-9,458	-3,646	1,944
Mining, quarrying, and oil and gas extraction	138,000	125,167	139,292	138,583	-12,833	14,125	-708
Other services (except public administration)	109,938	97,104	97,583	98,111	-12,833	479	528
Professional, scientific and technical services	177,917	172,667	187,146	204,750	-5,250	14,479	17,604
Public administration	111,375	102,125	102,646	106,528	-9,250	521	3,882
Real estate and rental and leasing	34,375	33,521	40,938	40,917	-854	7,417	-21
Retail trade	245,729	224,792	264,083	288,056	-20,938	39,292	23,972
Transportation and warehousing (non-tourism)	89,958	91,167	94,833	98,583	1,208	3,667	3,750

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Utilities	23,625	22,875	20,354	20,111	-750	-2,521	-243
Wholesale trade	84,417	82,000	75,000	83,861	-2,417	-7,000	8,861
Total Alberta Employment	2,279,333	2,129,750	2,239,208	2,346,917	-149,583	109,458	107,708

Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

3. LABOUR MARKET OUTLOOK

PROJECTED EMPLOYMENT

Tourism HR Canada engaged the Conference Board of Canada to develop employment projections for the tourism sector. The results were published in July 2022. The following table summarizes their projections regarding employment in the Alberta's tourism sector by industry group from 2021 to 2025. Over the four-year period, employment in the tourism sector (overall) is projected to grow at a compounded annual rate of 7.1%. The leading industry in terms of growth is expected to be travel services (18.1%) and accommodation (15.2%).

Table 12: Projected Growth Rates in Alberta's Tourism Sector by Industry (2021-2025)

Alberta	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
Tourism Sector Totals	191,271	228,895	241,891	247,817	252,105	31.8%
<i>Year-over-year Growth</i>	-	19.7%	5.7%	2.4%	1.7%	7.1%
Industry						
Accommodation	13,438	21,448	22,972	23,357	23,693	76.3%
<i>year-over-year growth</i>	-	59.6%	7.1%	1.7%	1.4%	15.2%
Food and Beverage services	96,604	115,763	120,393	122,134	123,954	28.3%
<i>year-over-year growth</i>	-	19.8%	4.0%	1.4%	1.5%	6.4%
Recreation and Entertainment	39,688	44,358	47,779	49,047	50,184	26.4%
<i>year-over-year growth</i>	-	11.8%	7.7%	2.7%	2.3%	6.0%
Transportation	39,188	42,518	45,453	47,828	48,650	24.1%
<i>year-over-year growth</i>	-	8.5%	6.9%	5.2%	1.7%	5.6%
Travel services	2,354	3,800	4,190	4,430	4,587	94.8%
<i>year-over-year growth</i>	-	61.4%	10.3%	5.7%	3.5%	18.1%

Source: Projections-of-Tourism-and-Employment-Demand-in-Canada-2019-2025, Conference Board of Canada

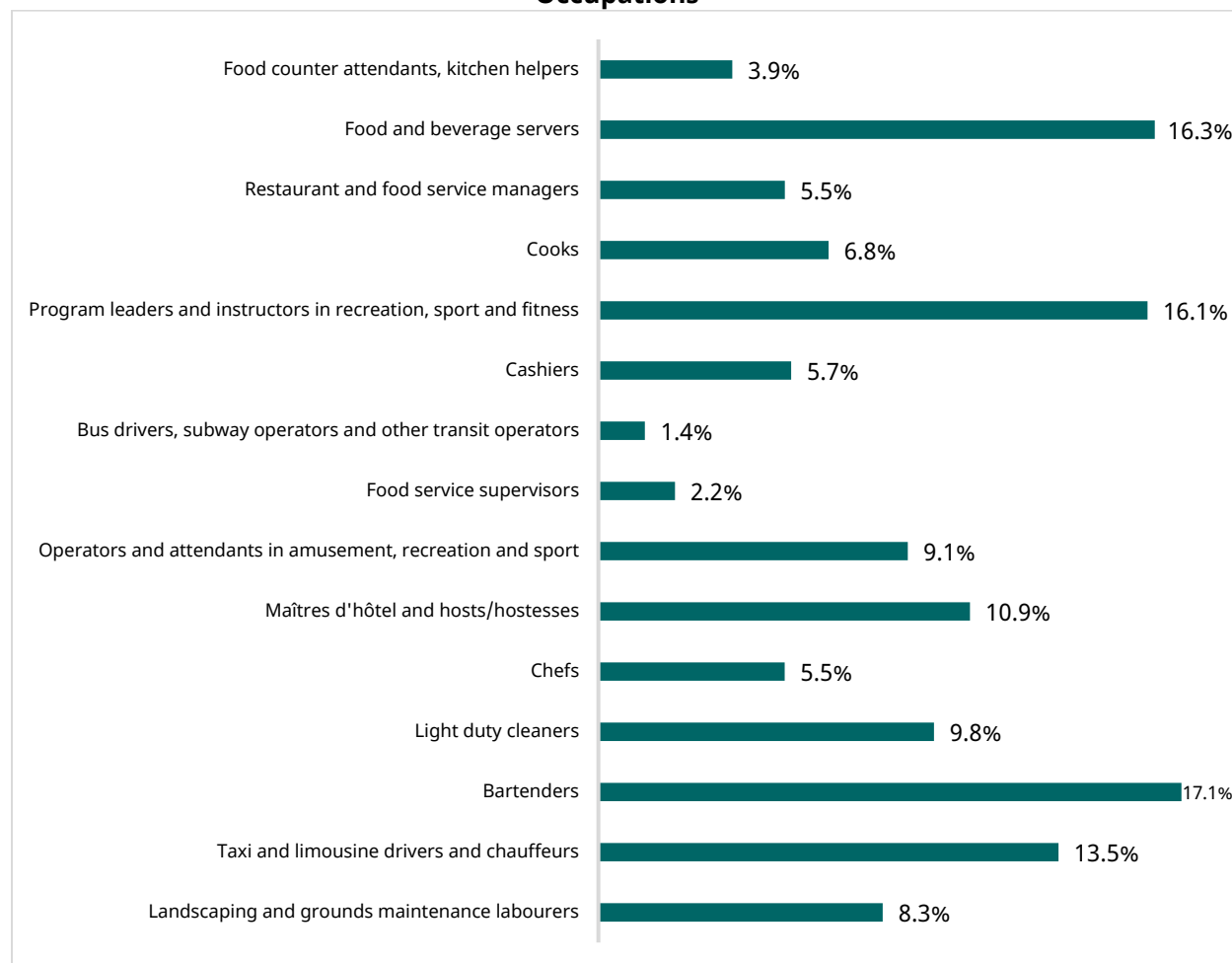
Across Canada, the Conference Board projected compounded annual employment growth in the tourism sector of 6.4% of the 4-year growth period from 2021 to 2025. This growth is consistent with the results of a recent survey conducted for Tourism HR Canada.¹¹ Of the 700 tourism employers surveyed, 29% are projecting employment to increase. The projected growth was attributed to improving business conditions (59% of employers indicated that current business and operating conditions have improved compared to the summer of 2021) and business expansion (53% of those employers who anticipate an increase in employment reported that their operations are growing).

¹¹ Business Intelligence Survey, Labour Market Information, Tourism HR Canada, 2022

EMPLOYMENT BY OCCUPATION

The following chart shows the projected four-year compounded annual growth in Alberta's tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be bartenders and food and beverage servers as well as program leaders and instructors in recreation, sport and fitness.

Figure 13: Alberta Tourism Projected 5-year compounded annual growth rates - Top 15 Occupations¹²



Source: *Projections-of-Tourism-and-Employment-Demand-in-Canada-2019-2025*, Conference Board of Canada

¹² Detailed descriptions of these occupations can be found here:
<https://noc.esdc.gc.ca/Structure/Hierarchy?objectid=%2Fd0IGA6qD8JPRfoj5UCjpg%3D%3D>

