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SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

ATALYST
RESEARCH GROUP

Provincial Report Series: Manitoba



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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" is written in a large, black, serif font. A small Canadian flag is positioned to the right of the letter 'a'.

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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 March 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. To the extent possible, 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 Manitoba, 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 Manitoba'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 industry labour market?** Chapter 3 provides projections regarding employment in the Manitoba's tourism sector 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 MANITOBA TOURISM SECTOR

Manitoba's tourism sector is comprised of companies which provide accommodation, food and beverage services, recreation and entertainment, transportation and travel services. Tourists in Manitoba enjoy watching polar bears in the wild, experiencing the northern lights, watching some of the best sunsets in the world and visiting the renowned Canadian Museum for Human Rights.¹

Manitoba's tourism sector is growing and is one the province's leading industries. In 2019, the province was able to attract 10.5 million people to Manitoba who spent \$1.6 billion throughout the province. The vast majority of visitors in 2019 were Canadian, including Manitobans. A total of 5% were from the U.S., with 1% arriving from international markets. After the pandemic hit, the sector struggled significantly. Manitoba lost 2% of the jobs it had pre-pandemic or 13,700 jobs, employment in the lodging and restaurants sector is down 15% or 6,500 jobs. These jobs account for almost half of all lost jobs in Manitoba. Despite the challenges that the province is facing as a result of the pandemic, it is set to rebound faster than expected. The projections points to a return to 2019 visitation levels by 2023 and a return 2019 visitor spending levels by 2024.² On June 10, 2022, the federal government announced that it will provide Manitoba with \$10.8 million for its tourism sector to help with its recovery from the COVID-19 pandemic.³

There are over 59,000 people employed in the province. The most in-demand tourism related jobs in Manitoba are in restaurants (e.g., chefs, line cooks, servers and bartenders), hotels (e.g., front desk clerks, housekeeping room attendants and maintenance staff) and retailers (e.g., cashiers, salespeople and shelf stockers).⁴

¹ <https://travellingmanning.com/places-to-visit-in-manitoba/>

² https://s3.us-west-1.amazonaws.com/manitoba-2020/images/07-files-downloads/files/21-002_MBTourismStrategy_TMB.Update_06May21.pdf?v=1627412441

³ <https://globalnews.ca/news/8912706/federal-government-investment-manitoba-tourism-industry/>

⁴ <https://manitobacareerprospects.ca/128/tourism-hospitality-and-retail-customer-service>

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 industry. 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

Manitoba's tourism sector employed an average of 65,139 employees through the first nine months of 2022, of whom 50% were employed in food and beverage services, 24% in recreation and entertainment, 15% in transportation, 11% in accommodation and 1% in the travel services industry.

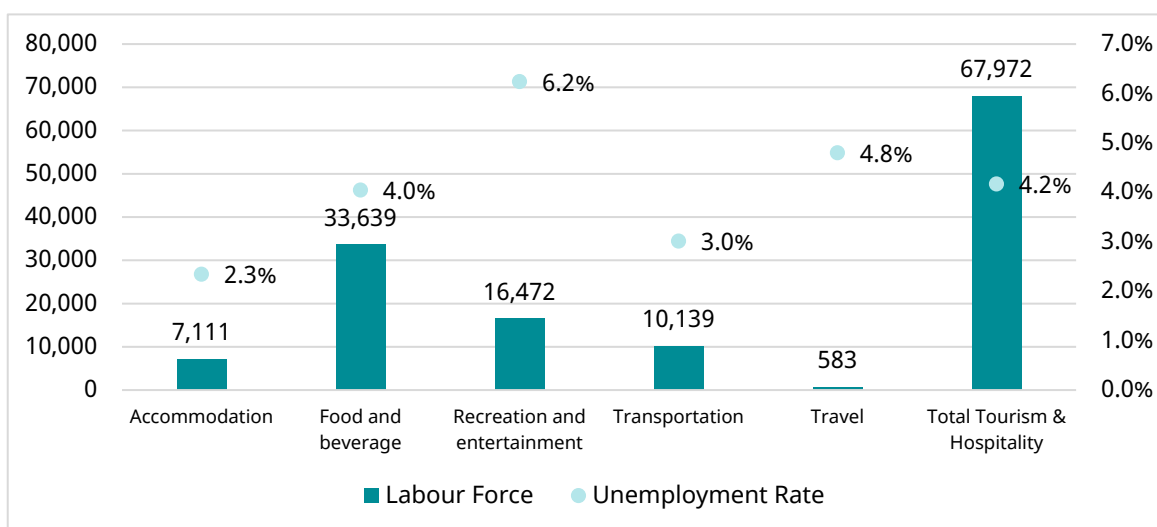
Table 1: Employment in the Manitoba Tourism Industry and Sector, 2022

Industry	Manitoba	
	#	%
Accommodation	6,944	11%
Food and beverage services	32,306	50%
Recreation and entertainment	15,444	24%
Transportation	9,861	15%
Travel services	583	1%
Tourism Sector Total	65,139	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 67,972 through the first nine months of 2022. Unemployment averaged 34.2%.

Figure 1: Total Labour Force and Unemployment Rate, Manitoba 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 Manitoba tourism sector accounts for 9.7% of the total employment in Manitoba, slightly higher than the national tourism industry average of 9.5%.

Table 2: Manitoba Tourism Sector vs Total Employment, 2022

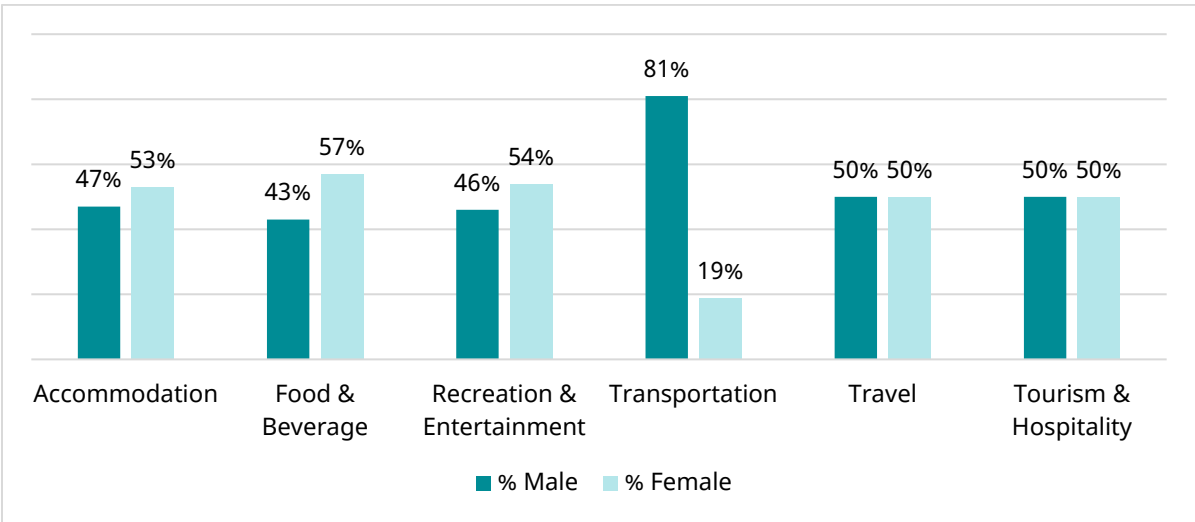
Employment	Manitoba	Canada
Tourism	65,139	1,859,806
Overall Employment	669,750	19,523,917
Percent Tourism of Overall Employment	9.7%	9.5%

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

DEMOGRAPHIC CHARACTERISTICS

Overall, the workforce is relatively evenly divided in terms of gender. The transportation industry has the highest concentration of male workers (81%) while the food and beverage services industry has the highest concentration of female workers (57%).

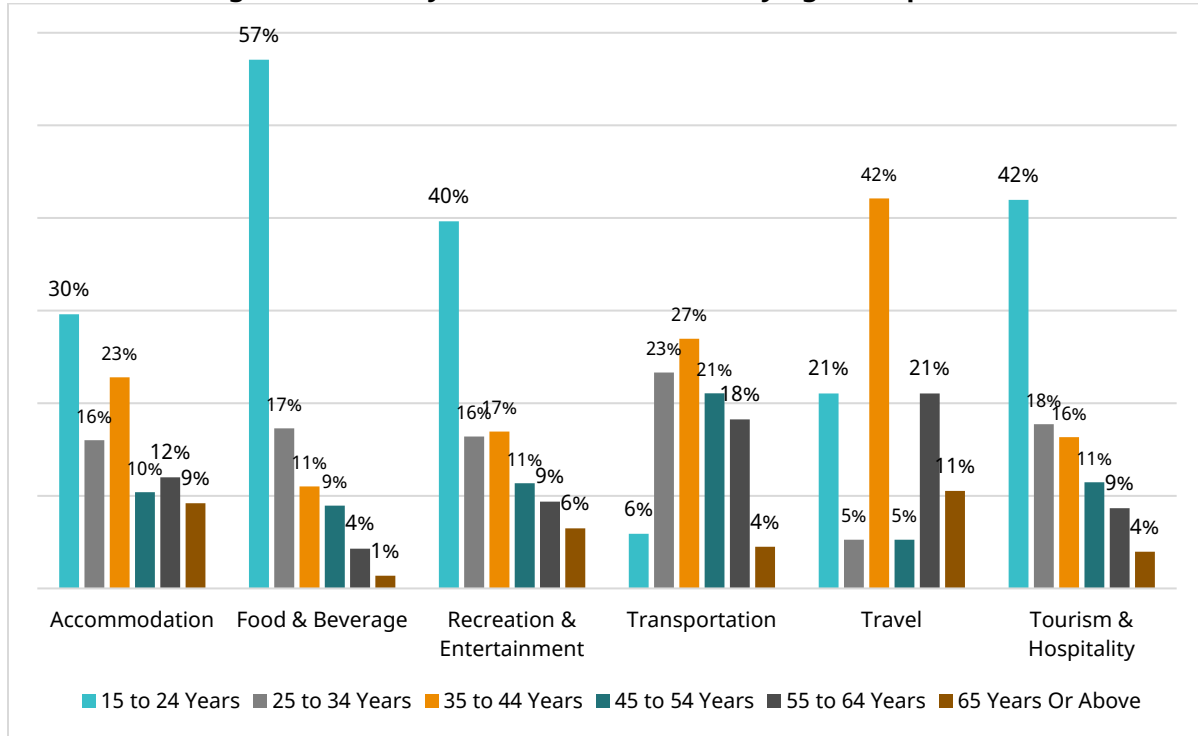
Figure 2: Workforce Gender by Industry and Sector, 2022



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

The food and beverage services industry has the youngest workforce with 57% of its workers being between 15 and 24 years of age, while the travel services industry is the oldest with 32% of its workers being 55 years or older. A total of 60% of the workforce is under the age of 35.

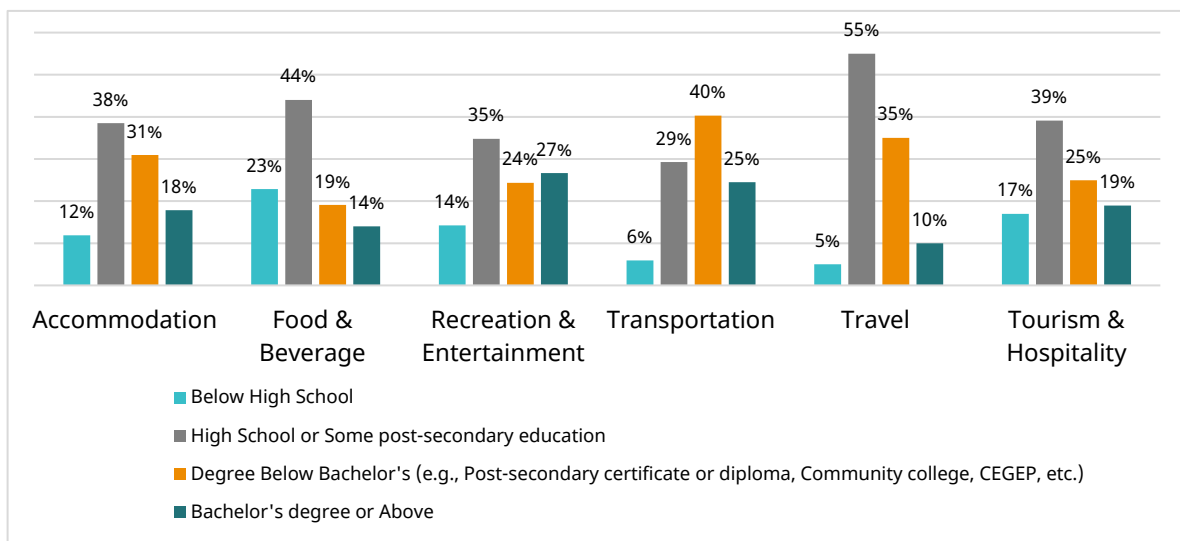
Figure 3: Industry and Sector Workforce by Age Groups, 2022



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

A total of 44% have a post-secondary diploma or higher. The travel services industry has the highest percentage of workers with a post-secondary education or higher while food and beverage services industry has the highest percentage of workers with below high school level education (reflecting the high percentage of workers who are 24 or less).

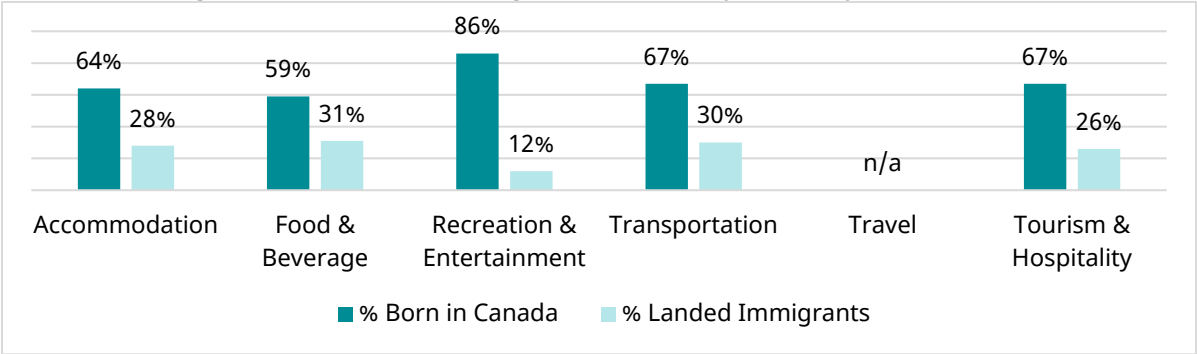
Figure 4: Workforce Education Level by Industry and Sector, 2022



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

In 2022, 67% of the tourism sector workforce were born in Canada, whereas 26% 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 food and beverage services.

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

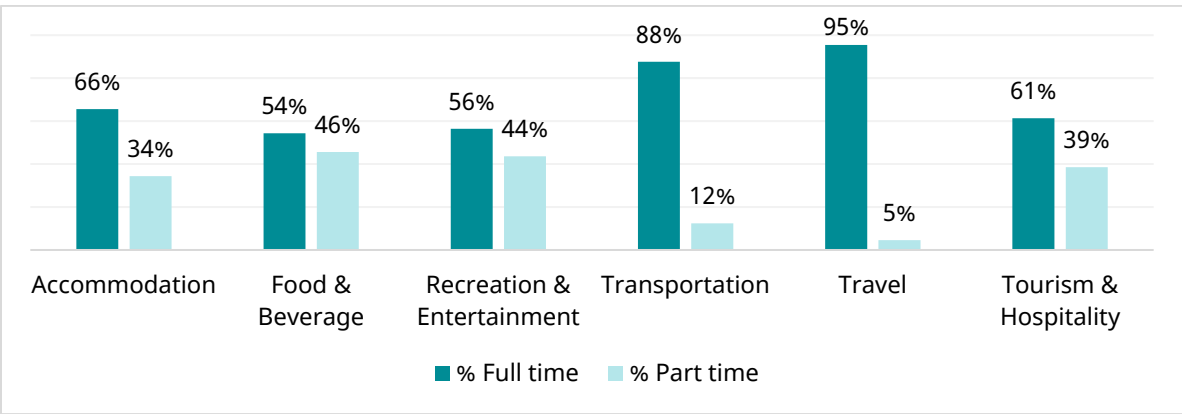


Source: THRC Employment Tracker, LFS Statistics Canada.

EMPLOYMENT STATUS AND WAGES

Approximately 61% of the provincial workforce is employed on a full-time basis and 39% is employed part-time. The travel services industry has the highest percentage of full-time workers (95%) while the food and beverage services industry has the highest percentage of part-time workers (46%).

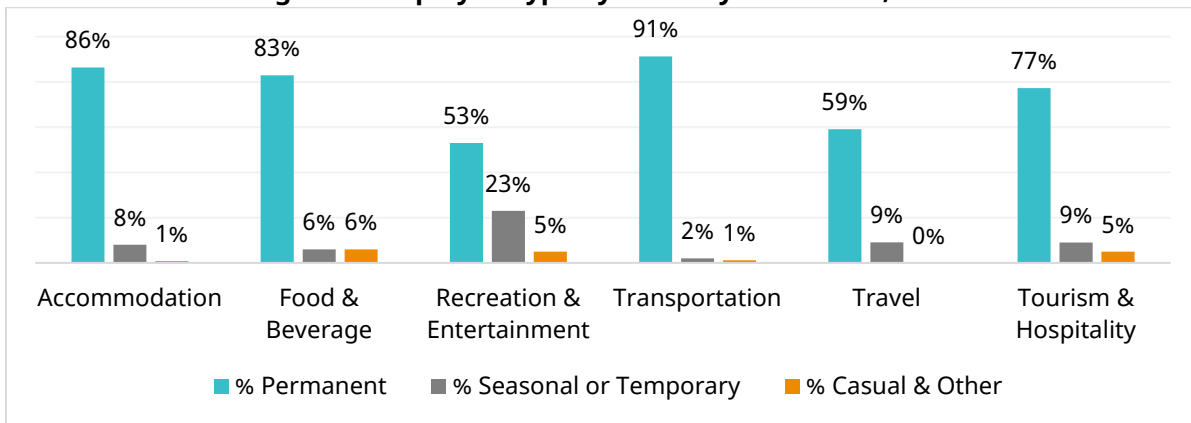
Figure 6: Job Status by Industry and Sector, 2022



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

Permanent workers account for 77% of the workforce, while 14% are seasonal, temporary, or casual workers (the remaining 9% of the workers have an unknown status in the Labour Force Survey). The transportation industry has the highest percentage of permanent employees (91%), whereas the recreation and entertainment industry have the highest percentage of seasonal employees (23%).

Figure 7: Employee Type by Industry and Sector, 2022

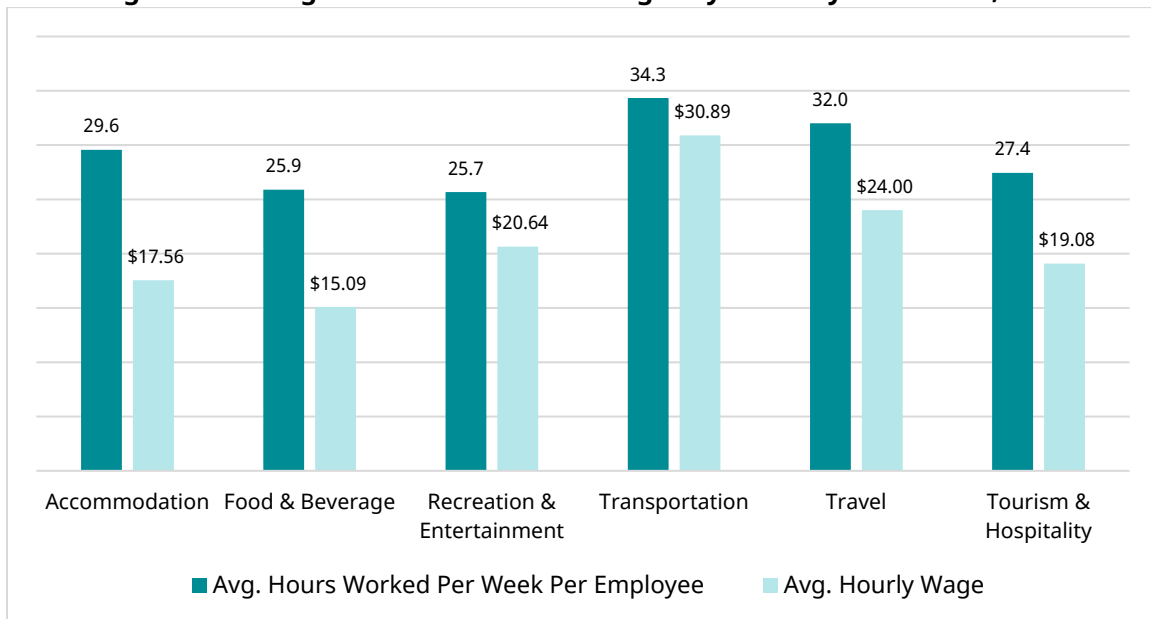


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

*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 \$19 per hour and the average hours worked per week is 27. Employees in the transportation industry work the most hours per week (of 34 hours per employee) and are paid the highest average hourly wage (\$31 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 Manitoba tourism sector workforce have been employed in their current positions for seven years. The transportation industry has the longest average length of employment of 11.7 years, while food and beverage services industry had the shortest average length of employment of 4.8 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	1,333	19%	4,667	14%	3,222	21%	361	4%	-	0%	9,583	15%
1 to 2	1,583	23%	11,361	35%	2,556	17%	1,194	12%	111	19%	16,806	26%
2 to 4	1,361	20%	9,444	29%	3,278	21%	1,417	14%	28	5%	15,528	24%
5 to 7	833	12%	2,444	8%	2,083	13%	1,194	12%	0	0%	6,528	10%
8 to 10	722	10%	1,861	6%	833	5%	1,861	19%	83	14%	5,361	8%
11 to 15	361	5%	1,083	3%	1,278	8%	1,639	17%	222	38%	4,583	7%
16 to 20	333	5%	444	1%	889	6%	778	8%	139	24%	2,583	4%
Over 20	444	6%	1,000	3%	1,306	8%	1,389	14%	0	0%	4,139	6%
Total	6,944	100%	32,306	100%	15,444	100%	9,861	100%	583	100%	65,139	100%
<i>Avg. Length</i>	<i>6.7 years</i>		<i>4.8 years</i>		<i>7.6 years</i>		<i>11.7 years</i>		<i>11.5 years</i>		<i>6.8 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 food and beverage services industry accounts for the occupations that have the highest average experience levels.

Table 4: Leading Occupations in Manitoba'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	9,111	\$13.10	3.4
6513	Food and beverage servers	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	5,806	\$16.30	3.4
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	5,611	\$14.30	3.9
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	3,694	\$15.50	5.6
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	3,667	\$23.00	11.7
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> On the job training 	Food & Beverage services	3,278	\$15.90	3.6
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	2,611	\$25.00	9.0
6611	Cashiers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	2,278	\$12.80	3.7
6722	Operators and attendants in amusement, recreation, and sport	<ul style="list-style-type: none"> On-the-job training 	Recreation & Entertainment	1,917	\$15.50	4.4

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
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	1,806	\$18.10	4.2
6731	Light duty cleaners	<ul style="list-style-type: none"> On-the-job training Certification for housekeeping room attendants or similar certification 	Accommodation	1,417	\$14.70	6.0
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	861	\$21.00	7.8
8612	Landscaping and grounds maintenance labourers	<ul style="list-style-type: none"> A provincial licence to apply chemical fertilizers, fungicides, herbicides and pesticides may be required. 	Recreation & Entertainment	833	\$18.00	3.7
6525	Hotel front desk clerks	<ul style="list-style-type: none"> Completion of a two-year apprenticeship program, or a college program in front desk operations or hotel management Guest services representative trade certification 	Accommodation	778	\$14.70	3.5
6512	Bartenders	<ul style="list-style-type: none"> Responsible beverage service certification On-the-job training 	Food & Beverage services	750	\$14.70	10.1
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	694	\$12.30	6.6
6733	Janitors, caretakers and building superintendents	<ul style="list-style-type: none"> Cleaning and maintenance experience A journeyman/woman certificate or a building operator certificate 	Accommodation	583	\$17.80	6.3
5131	Producers, directors, choreographers	<ul style="list-style-type: none"> A relevant university degree or college diploma Experience in a technical or production occupation in motion pictures, broadcasting or theatre 	Recreation & Entertainment	528	\$27.00	4.5

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
0632	Accommodation service managers	<ul style="list-style-type: none"> A university degree or college diploma in hotel management or other related discipline or equivalent job experience 	Accommodation	417	\$34.00	9.1
2271	Air pilots, flight engineers and flying instructors	<p>Pilots and flight engineers</p> <ul style="list-style-type: none"> A university degree or college diploma A commercial pilot's licence or an air transport pilot's licence is required Additional licences or endorsements to fly different types of aircraft are required Flight engineers require a flight engineer licence issued by Transport Canada <p>Flight instructors</p> <ul style="list-style-type: none"> A university degree or college diploma A commercial pilot's or an air transport pilot's licence is required Transport Canada ratings and endorsements to provide instructions on different types of aircraft are required 	Transportation	417	\$49.00	13.3

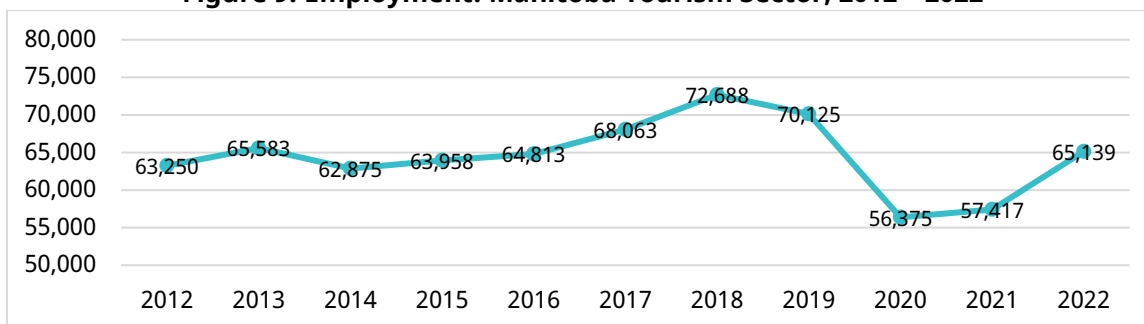
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

2. IMPACT OF THE PANDEMIC

CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 1.5% from 2012 to 2019, rising from an average of 63,250 employees per month in 2012 to 70,125 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (65,139 employees per month) remain below pre-pandemic levels.

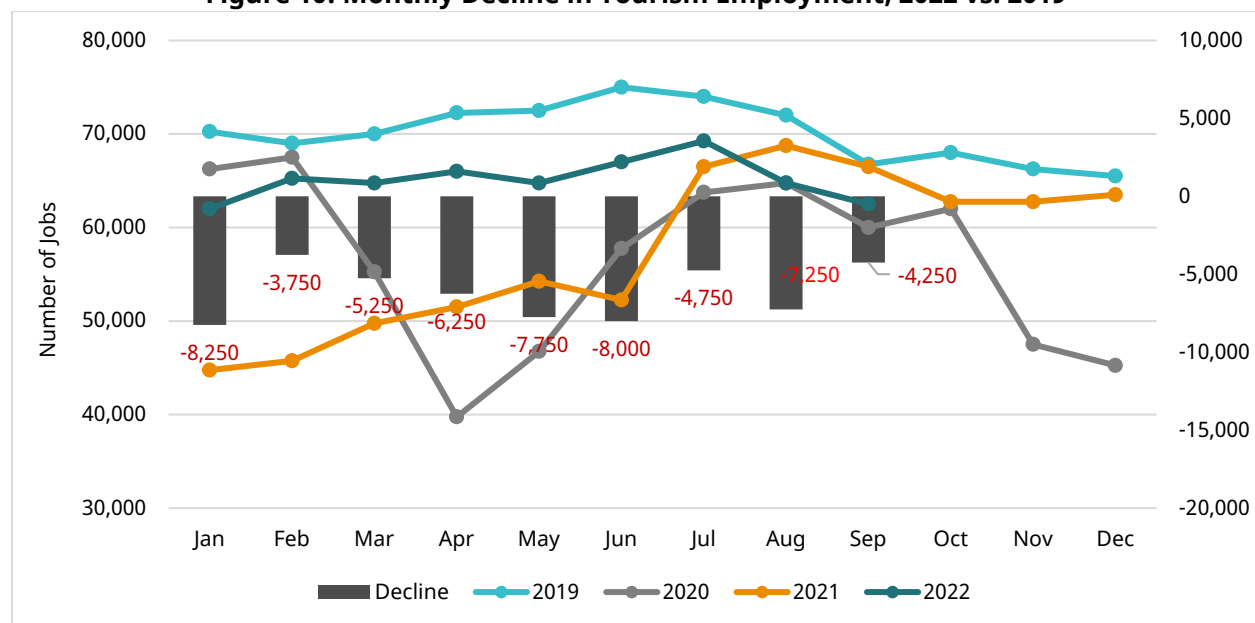
Figure 9: Employment: Manitoba Tourism Sector, 2012 – 2022



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.

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 7% in 2022 relative to 2019, the percentage varies from growth of 3% in recreation and entertainment to losses of 63% in the 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	7,563	5,021	5,083	6,944	-34%	-33%	-8%
Food and Beverage services	34,167	28,604	27,667	32,306	-16%	-19%	-5%
Recreation and Entertainment	15,021	11,875	12,896	15,444	-21%	-14%	3%
Transportation	11,854	10,021	11,313	9,861	-15%	-5%	-17%
Travel services	1,521	854	458	583	-44%	-70%	-62%
Total	70,125	56,375	57,417	65,139	-20%	-18%	-7%

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. Those under the age of 35 and female workers were the most likely to be displaced. The relative balance in decline between part-time and full-time workers in 2020 masks the fact that many of the full-time workers became part-time workers while those who previously worked part-time were displaced.

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	43,646 (62%)	34,750 (62%)	36,250 (63%)	40,000 (61%)	-20%	-17%	-8%
Part-time	26,479 (38%)	21,646 (38%)	21,229 (37%)	25,111 (39%)	-18%	-20%	-5%
Permanent							
Permanent	54,188 (77%)	41,604 (74%)	43,917 (76%)	50,361 (77%)	-23%	-19%	-7%
Seasonal	3,458 (5%)	2,542 (5%)	3,042 (5%)	3,917 (6%)	-26%	-12%	13%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Casual	3,375 (5%)	2,417 (4%)	2,125 (4%)	2,444 (4%)	-28%	-37%	-28%
Temporary	2,646 (4%)	2,167 (4%)	2,438 (4%)	2,250 (3%)	-18%	-8%	-15%
Gender							
Male	33,771 (48%)	29,063 (52%)	30,750 (54%)	32,611 (50%)	-14%	-9%	-3%
Female	36,333 (52%)	27,313 (48%)	26,667 (46%)	32,528 (50%)	-25%	-27%	-10%
Age Group							
15 to 24	25,646 (37%)	20,000 (35%)	20,854 (36%)	27,333 (42%)	-22%	-19%	7%
25 to 34	15,417 (22%)	11,063 (20%)	11,979 (21%)	11,556 (18%)	-28%	-22%	-25%
35 to 44	10,583 (15%)	8,604 (15%)	8,354 (15%)	10,639 (16%)	-19%	-21%	1%
45 to 54	9,667 (14%)	7,646 (14%)	7,750 (13%)	7,472 (11%)	-21%	-20%	-23%
55 to 64	6,875 (10%)	6,917 (12%)	6,771 (12%)	5,639 (9%)	1%	-2%	-18%
65 or above	1,917 (3%)	2,167 (4%)	1,771 (3%)	2,583 (4%)	13%	-8%	35%
Education							
Below high school	11,750 (17%)	8,438 (15%)	8,604 (15%)	11,056 (17%)	-28%	-27%	-6%
High school or some post-secondary	29,896 (43%)	24,875 (44%)	23,729 (41%)	25,472 (39%)	-17%	-21%	-15%
Degree below bachelor's	16,417 (23%)	12,083 (22%)	14,958 (26%)	16,250 (25%)	-26%	-9%	-1%
Bachelor's degree or above	12,125 (17%)	10,938 (19%)	10,188 (18%)	12,333 (19%)	-10%	-16%	2%

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

These patterns are also reflected in the number of years people have worked in the industry. The loss of workers is evident in the decline in workers with less than 1 year of 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	12,125	7,063	10,500	9,583	-42%	-13%	-21%
1 year	14,625	11,375	8,188	16,806	-22%	-44%	15%
2 to 4 years	19,896	16,125	16,604	15,528	-19%	-17%	-22%
5 to 7 years	7,313	5,979	6,396	6,528	-18%	-13%	-11%
8 to 10 years	5,125	4,833	3,750	5,361	-6%	-27%	5%
11 to 15 years	4,188	4,271	4,583	4,583	2%	9%	9%
16 to 20 years	2,625	2,271	2,813	2,583	-13%	7%	-2%
Over 20 years	4,271	4,500	4,646	4,139	5%	9%	-3%
Total	70,125	56,375	57,417	65,139	-20%	-18%	-7%
Avg. years	6.5	7.5	7.5	6.8	-	-	-

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 10% in 2020. More recently, in 2022, the food and beverage services industry experienced a small increase of average hours per week relative to 2019.

Table 8: Manitoba 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	30.9	27.0	29.3	29.6	-13%	-5%	-4%
Food and Beverage services	25.5	23.3	25.3	25.9	-9%	-1%	2%
Recreation and Entertainment	28.8	25.8	28.7	25.7	-10%	-0.3%	-11%
Transportation	36.1	34.1	35.2	34.3	-6%	-2%	-5%
Travel services	34.0	16.4	28.0	32.0	-52%	-18%	-6%
Tourism Manitoba	28.8	26.0	28.6	27.4	-10%	-1%	-5%

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

Overall, the average hourly wage in Manitoba's tourism sector increased during the pandemic. Average hourly wage increased by 10% in 2021 and by 6% in 2022 as compared to 2019.

The average hourly wage increased from \$17.93 in 2019 to \$19.00 in 2020, \$19.50 in 2021. Wages decreased by \$0.67 from 2021 to 2022.

Table 9: Average Hourly Wage in Manitoba'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	\$16.09	\$16.81	\$16.38	\$17.56	4%	2%	9%
Food and Beverage services	\$13.71	\$14.12	\$14.70	\$15.09	3%	7%	10%
Recreation and Entertainment	\$19.78	\$21.54	\$21.92	\$20.64	9%	11%	4%
Transportation	\$29.42	\$31.83	\$32.08	\$30.89	8%	9%	5%
Travel services	\$20.81	\$18.90	\$ 22.00	\$24.00	-9%	6%	15%
Tourism Manitoba	\$17.93	\$19.00	\$19.75	\$19.08	6%	10%	6%

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

CHANGES IN EMPLOYMENT BY OCCUPATIONAL GROUP

Occupations associated with the transportation industry tended to experience the largest declines in employment. The following table shows the change in employment of the leading occupations in the sector throughout the pandemic until now.

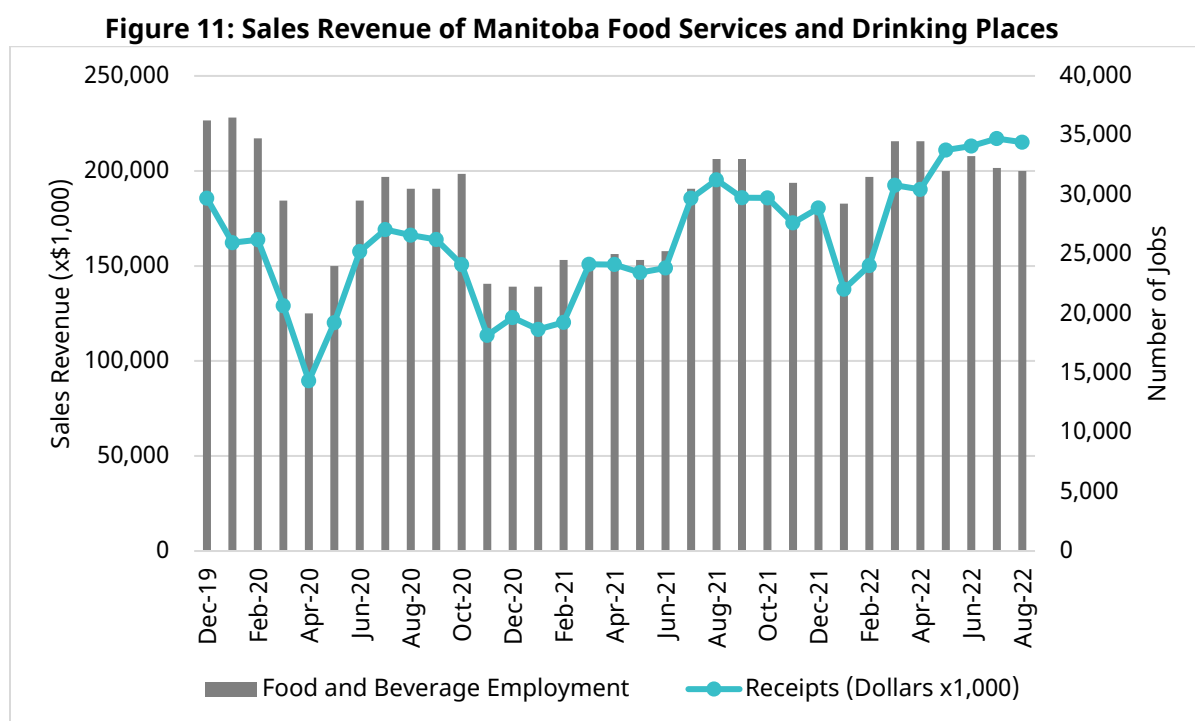
Table 10: Employment of Leading Occupations in Manitoba's Tourism Sector (2019-2022)

NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	9,146	8,063	7,646	9,111	-12%	-16%	0%
6513	Food and beverage servers	6,688	3,917	4,042	5,806	-41%	-40%	-13%
6322	Cooks	6,792	5,354	6,229	5,611	-21%	-8%	-17%
6311	Food service supervisors	3,292	3,000	2,229	3,694	-9%	-32%	12%
0631	Restaurant and food service managers	3,292	3,542	2,438	3,667	8%	-26%	11%
6511	Maîtres d'hôtel and hosts/hostesses	2,542	2,146	2,146	3,278	-16%	-16%	29%
7512	Bus drivers, subway operators and other transit operators	1,792	2,042	2,271	2,611	14%	27%	46%
6611	Cashiers	2,333	1,833	1,896	2,278	-21%	-19%	-2%
6722	Operators and attendants in amusement, recreation and sport	1,333	917	1,500	1,917	-31%	13%	44%
5254	Program leaders and instructors in recreation, sport and fitness	2,979	1,875	1,292	1,806	-37%	-57%	-39%
6731	Light duty cleaners	1,563	1,083	688	1,417	-31%	-56%	-9%
6321	Chefs	1,875	1,063	1,208	861	-43%	-36%	-54%
6525	Hotel front desk clerks	833	500	438	778	-40%	-48%	-7%
6512	Bartenders	938	771	438	750	-18%	-53%	-20%
7513	Taxi and limousine drivers and chauffeurs	1,667	1,333	938	694	-20%	-44%	-58%
6733	Janitors, caretakers and building superintendents	667	563	479	583	-16%	-28%	-13%
5131	Producers, directors, choreographers	438	604	458	528	38%	5%	21%
0632	Accommodation service managers	667	604	833	417	-9%	25%	-38%
2271	Air pilots, flight engineers and flying instructors	979	625	688	417	-36%	-30%	-57%

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 June 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.



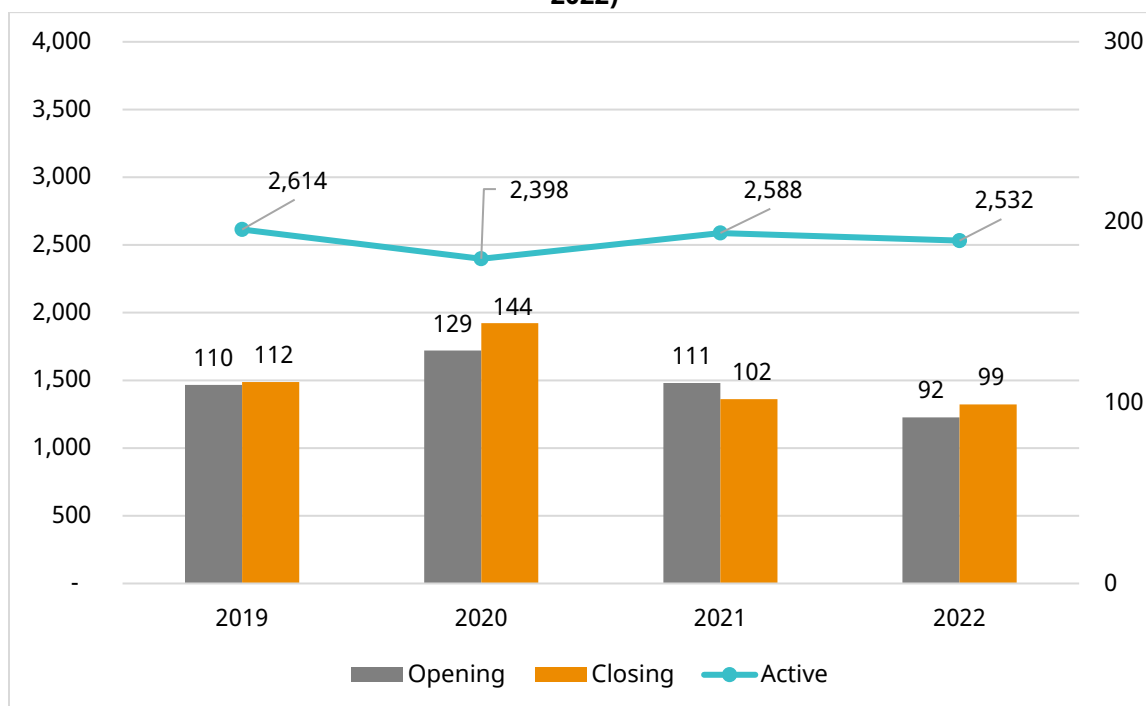
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01
Monthly survey of food services and drinking places (x 1,000)

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 2,614 in 2019 to 2,398 in 2020 before climbing to 2,532 in 2022.

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



Source: THRC Employment Tracker/Statistics Canada.

DATA ON WHERE EMPLOYEES WENT

Data indicates that the tourism sector lost employees to other sectors, either when permanent employees were displaced because of the pandemic or when seasonal workers failed to return for the following season. A recent Prudential Finance study found that about 22% of workers changed their jobs or careers during the pandemic.⁵ However, 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 public administration, as indicated in the table below.

⁵ 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, Manitoba (2019-2022)

	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	7,563	5,021	5,083	6,944	-2,542	62	1,861
Food and Beverage services	34,167	28,604	27,667	32,306	-5,563	-937	4,639
Recreation and Entertainment	15,021	11,875	12,896	15,444	-3,146	1,021	2,548
Transportation	11,854	10,021	11,313	9,861	-1,833	1,292	-1,452
Travel services	1,521	854	458	583	-667	-396	125
Sector Totals	70,125	56,375	57,417	65,139	-13,750	1,042	7,722
Accommodation and food services (non-tourism)	875	896	750	972	21	-146	222
Administrative and support, waste management and remediation services	20,875	21,208	20,708	21,639	333	-500	931
Agriculture, forestry, fishing and hunting	26,750	26,292	24,354	19,417	-458	-1,938	-4,938
Arts, entertainment and recreation (non-tourism)	271	604	333	389	333	-271	56
Construction	51,063	47,000	48,854	48,333	-4,063	1,854	-521
Educational services	51,542	54,167	57,708	60,167	2,625	3,542	2,458
Finance and insurance	25,292	24,625	27,792	30,611	-667	3,167	2,819
Health care and social assistance	104,646	101,271	104,063	104,111	-3,375	2,792	49
Information and cultural industries	7,250	7,208	8,375	8,389	-42	1,167	14
Manufacturing	65,229	59,958	63,729	63,750	-5,271	3,771	21
Mining, quarrying, and oil and gas extraction	4,646	3,896	3,250	3,472	-750	-646	222
Other services (except public administration)	27,438	28,208	27,813	27,778	771	-396	-35
Professional, scientific and technical services	29,729	31,333	32,208	34,528	1,604	875	2,319
Public administration	36,125	35,771	38,000	41,889	-354	2,229	3,889
Real estate and rental and leasing	7,813	8,813	7,604	8,750	1,000	-1,208	1,146
Retail trade	70,313	68,917	73,146	73,944	-1,396	4,229	799
Transportation and warehousing (non-tourism)	30,625	29,354	30,354	30,833	-1,271	1,000	479

	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Utilities	6,479	5,729	4,875	5,000	-750	-854	125
Wholesale trade	18,354	19,313	21,917	20,667	958	2,604	-1,250
Total Manitoba Employment	655,375	630,938	653,292	669,750	-24,438	22,354	16,458

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 Manitoba'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 industries in terms of growth are expected to be travel services (18.1%) and accommodation (15.2%).

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

Manitoba	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
Tourism Sector Totals	57,417	68,711	72,612	74,391	75,679	31.8%
<i>Year-over-year Growth</i>	-	19.7%	5.7%	2.4%	1.7%	7.1%
Industry						
Accommodation	5,083	8,113	8,689	8,835	8,962	76.3%
<i>year-over-year growth</i>	-	59.6%	7.1%	1.7%	1.4%	15.2%
Food and Beverage services	27,667	33,154	34,480	34,979	35,500	28.3%
<i>year-over-year growth</i>	-	19.8%	4.0%	1.4%	1.5%	6.4%
Recreation and Entertainment	12,896	14,414	15,525	15,937	16,306	26.4%
<i>year-over-year growth</i>	-	11.8%	7.7%	2.7%	2.3%	6.0%
Transportation	11,313	12,274	13,122	13,807	14,044	24.1%
<i>year-over-year growth</i>	-	8.5%	6.9%	5.2%	1.7%	5.6%
Travel services	458	739	815	862	892	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

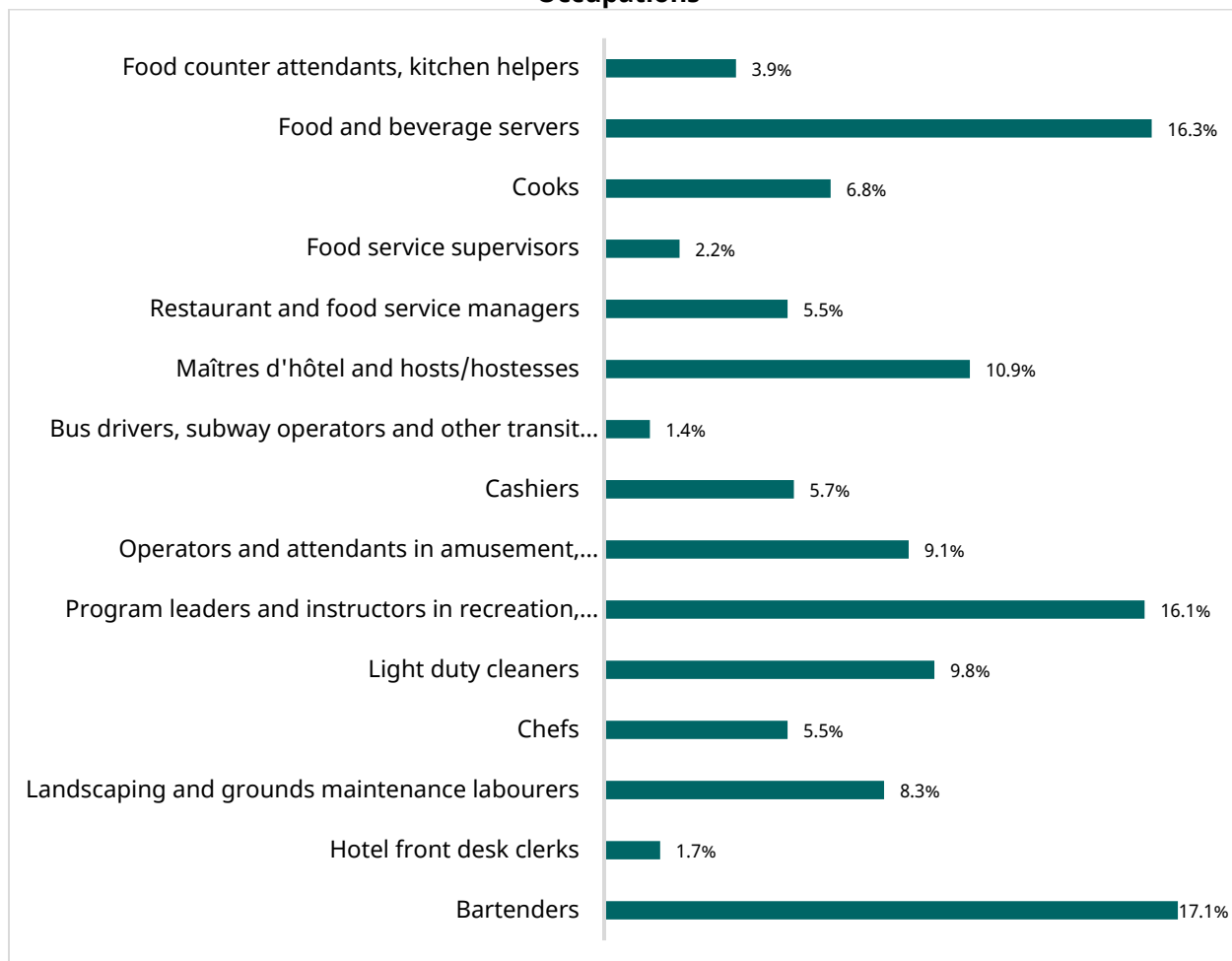
Across Canada, the Conference Board projected compounded annual employment growth in the tourism sector of 6.4% of the 4-year growth period from 2021 to 2025. This growth is consistent with the results of a recent survey conducted for Tourism HR Canada.⁶ Of the 700 tourism employers surveyed, 29% are 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).

⁶ 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 Manitoba's tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be bartenders, food and beverage servers and program leaders and instructors in recreation.

Figure 13: Manitoba Tourism Projected 5-year compounded annual growth rates by Top 15 Occupations⁷



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

⁷ Detailed descriptions of these occupations can be found here:
<https://noc.esdc.gc.ca/Structure/Hierarchy?objectid=%2Fd0IGA6qD8JPRfoj5UCjpg%3D%3D>

