

Tourism HR
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SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

ATALYST
RESEARCH GROUP

National Report: Canada



Prepared for:
Tourism HR Canada

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Published February 2023
By Tourism HR Canada
ISBN 978-1-55304-783-4
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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.
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Funded by the Government of Canada.

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INTRODUCTION

BACKGROUND

Prior to the COVID-19 pandemic, tourism was a significant and growing source of employment for a broad cross-section of Canadians across all regions of the country. 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 new 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; and labour market supply issues, 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 TOURISM LABOUR MARKET REPORTS

This report represents a national-level summary of information related to employment data and trends and broader economic, social, and political factors that affect the tourism industry and its workers. The information here has been rolled up to a national level, but provincial reports have also been produced which provide a more regional lens on the same questions.

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, and a literature review of strategies that are being used by industry and individual employers to address labour and skills shortages.

OVERVIEW OF THE CANADA TOURISM SECTOR

Canada's tourism sector is a complex ecosystem of private enterprises, industry associations, educators, workers, government agencies and NGOs. It is often organized into five streams:

- Accommodation (e.g., hotels, motels, bed and breakfasts, resorts, campgrounds)
- Food and beverage services (e.g., restaurants, pubs, cafes, lounges)
- Recreation and entertainment (e.g., arts and cultural facilities, sporting and recreation establishments, natural attractions, parks)
- Transportation, (e.g., air, water, and automotive transportation services); and
- Travel services (e.g., travel information and booking businesses).

According to the World Economic Forum's *Travel & Tourism Competitiveness Report 2019*, which ranks the most competitive countries for travel and tourism, Canada ranked ninth out of 140 countries studied. Canada ranked first in several sub-categories such as safety and security, environmental sustainability and air transport infrastructure, but ranked low in areas including price competitiveness and international openness.¹ The tourism sector in Canada is one of the few industries that generates business in every region, province and territory.² Visitors enjoy different types of tourism including Indigenous tourism, rural and remote tourism, LGBTQ2 tourism and Francophone tourism.³



Much of Canada's tourism is centered around Canada's four largest cities (Toronto, Montreal, Vancouver and Ottawa), which are well known for their culture, diversity and historic sites.⁴ Over 18 million foreigners visit Canada every year, making tourism an over \$80 billion sector, bigger than lumber, fishing and farming combined.⁵ In 2019, Canada's tourism sector was worth \$105 billion in total economic activity and 1.8 million jobs.⁶ Most tourism jobs can be found in British Columbia, Quebec, Ontario and Alberta.⁷ However, Canada is experiencing a labor shortage in the tourism sector as many workers decided to leave the sector during the COVID-19 pandemic.

¹ https://lop.parl.ca/sites/PublicWebsite/default/en_CA/ResearchPublications/202133E#aExe

² <https://tiac-aitc.ca/our-focus.html>

³ <https://ised-isde.canada.ca/site/canadian-tourism-sector/en>

⁴ <http://www.attractionscanada.com/canadatourism.asp>

⁵ <https://thecanadaguide.com/places/canadian-tourism/>

⁶ <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2021001/article/00023-eng.htm>

⁷ <https://opentextbc.ca/introtourism2e/chapter/canada-overview/>

This report makes use of the following classification of industries, using the Tourism Satellite Account's definition of the Tourism Sector, and using NAICs codes to define each industry group. 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

Canada’s tourism sector employed an average of 1,859,806 employees per month through the first nine months of 2022.⁸ Food and beverage services and Recreation and entertainment were by far the largest employers, which is unsurprising given the breadth of businesses included in these industry groups.

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

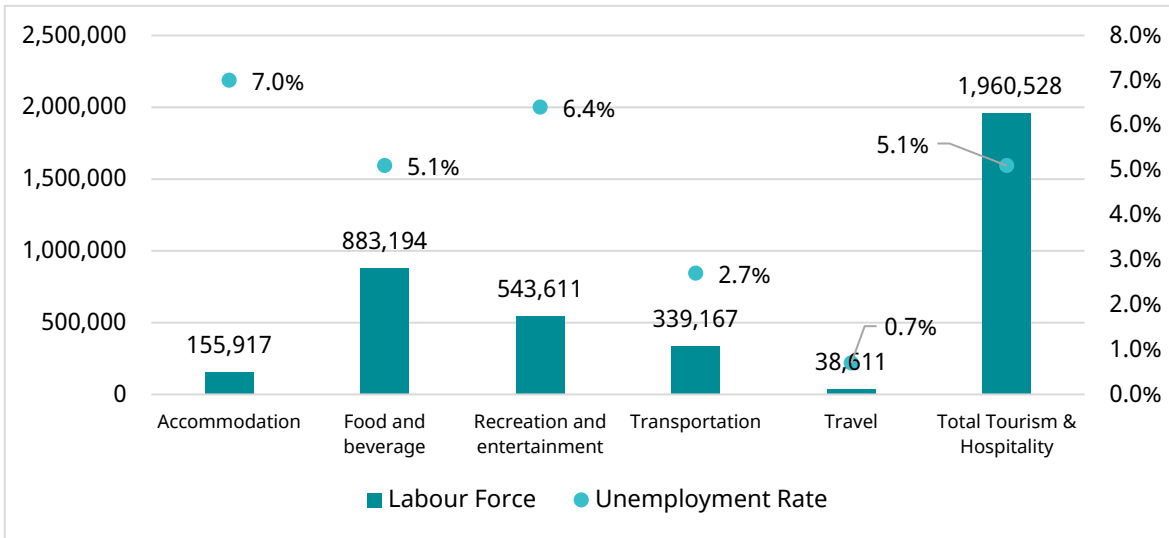
Industry	Canada	
	#	%
Accommodation	144,917	8%
Food and beverage services	837,778	45%
Recreation and entertainment	508,611	27%
Transportation	330,167	18%
Travel services	38,333	2%
Tourism Sector Total	1,859,806	100%

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 1,960,528 through the first nine months of 2022. Unemployment averaged 5.1%.

⁸ All data for 2022 figures are based on the first 9 months of the year.

Figure 1: Total Labour Force and Unemployment Rate, Tourism Industry and Sector, Canada, 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 tourism sector accounts for approximately 9.5% of the total employment in Canada.

Table 2: Tourism Sector vs Total Employment, Canada, 2022

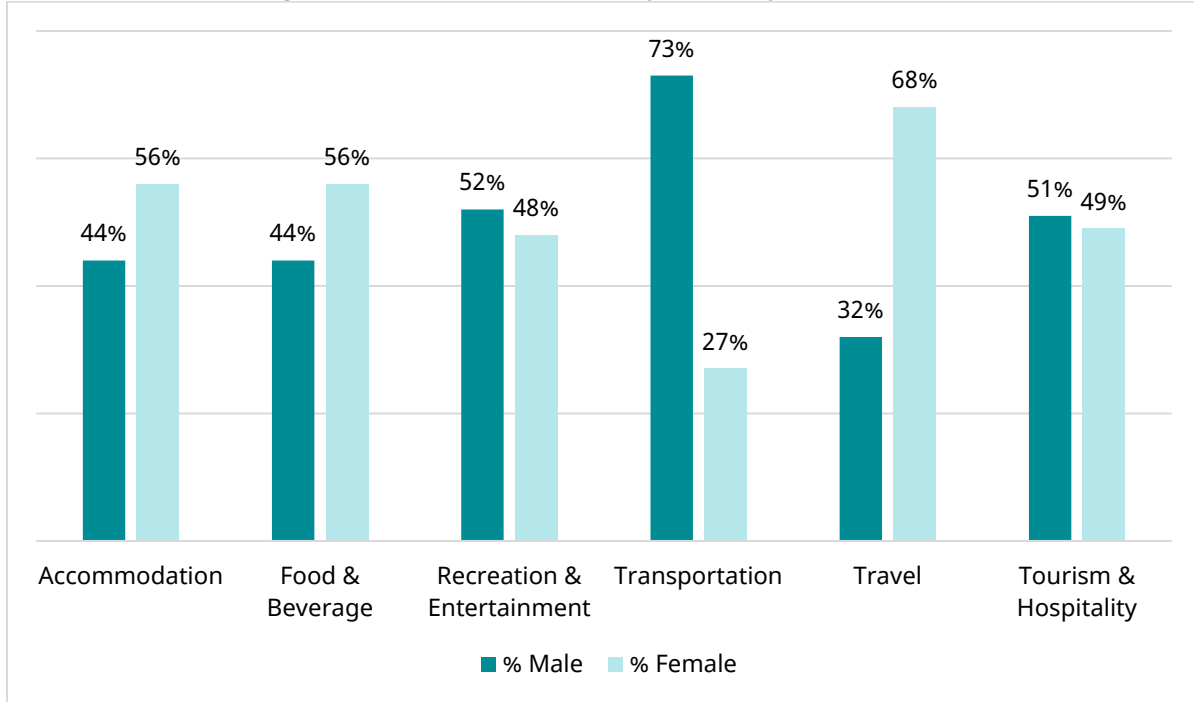
Employment	Canada
Tourism	1,859,806
Overall Employment	19,523,917
Percent Tourism of Overall Employment	9.5%

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 (73%) while the travel services industry has the highest concentration of female workers (68%). This likely reflects cultural expectations around technical and mechanical jobs versus office-based roles, and the types of training and career pathways presented to young men and young women as they leave school and enter the workforce.

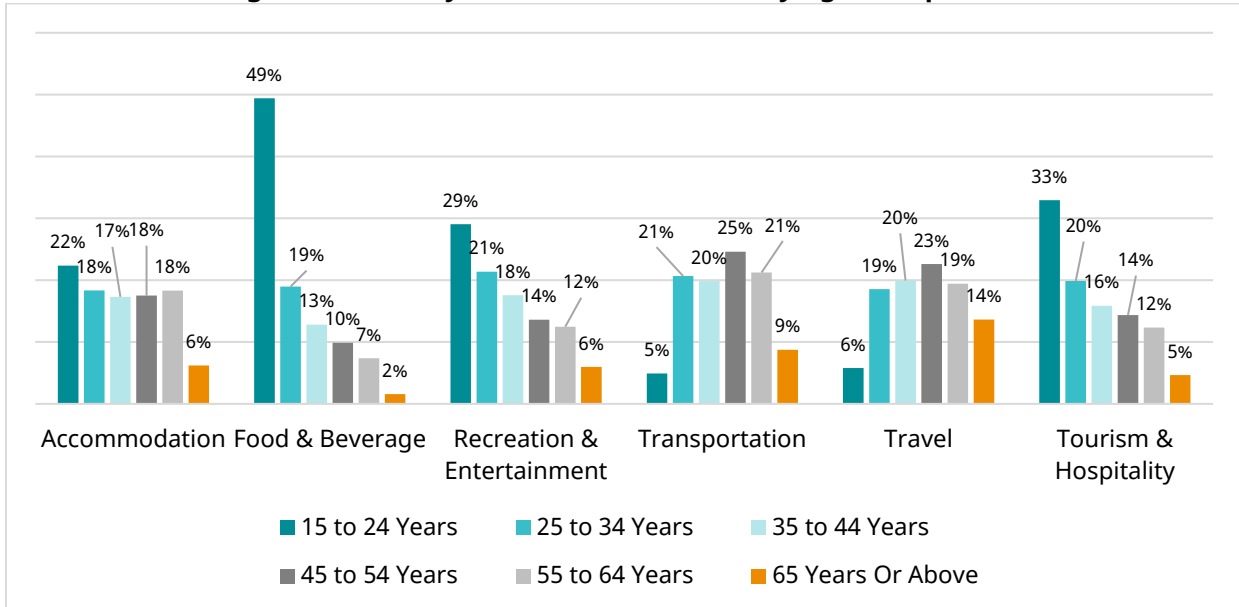
Figure 2: Workforce Gender by Industry and Sector, 2022



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

The food and beverage services industry has the youngest workforce with 49% of its workers being between 15 and 24 years of age, as it is a popular industry for students looking for part-time work. At the other end of the spectrum is transportation, where 30% of its workers are aged 55 years or older. Many of these workers have invested in specific licenses and certificates and are likely more career-oriented and therefore stay in the industry for longer. Across the sector, half of the workforce is under the age of 35.

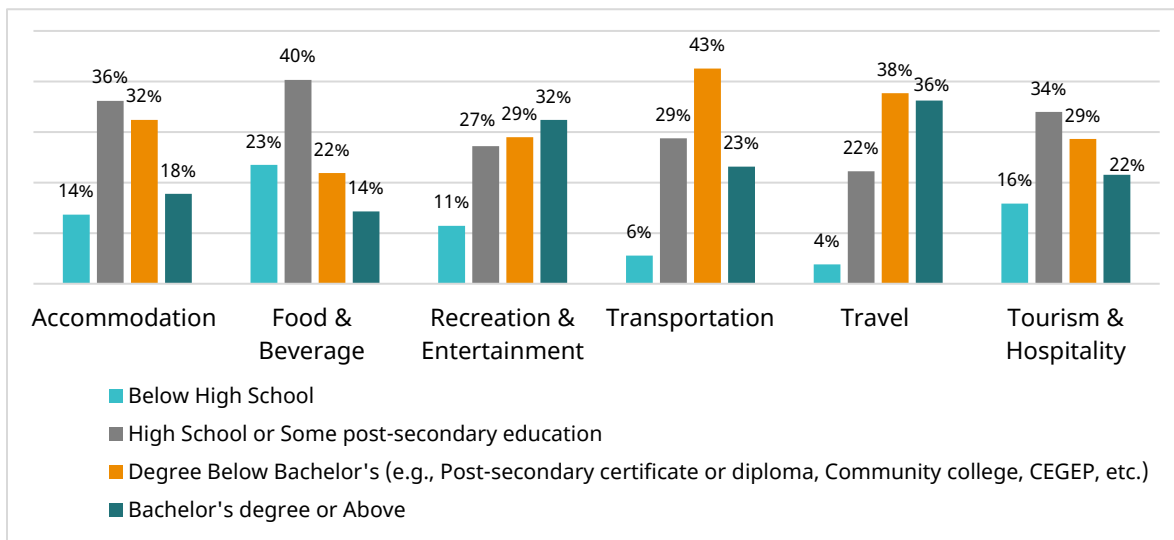
Figure 3: Industry and Sector Workforce by Age Groups, 2022



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

51% of workers have a post-secondary diploma or higher, which is reflected differently across the different industry groups. 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 less than a bachelor’s degree. This reflects the high percentage of younger workers in this industry, while the transportation and travel services industries tend to have older workers in jobs that require some degree of formal or technical training

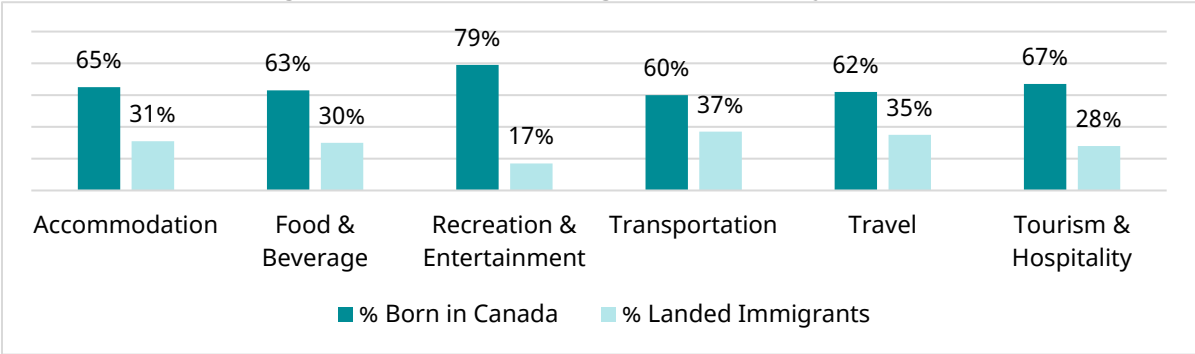
Figure 4: Workforce Education Level by Industry and Sector, 2022



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

In 2022, 67% of the tourism sector workforce were born in Canada, whereas 28% were landed immigrants (the remaining 5% includes citizens born outside of Canada, and workers on temporary or student visas). It is interesting to note that landed immigrants were most heavily represented in sectors that required a higher level of education or certification, and least represented in the recreation and entertainment industries.

Figure 5: Workforce Immigration Status by Sector, 2022

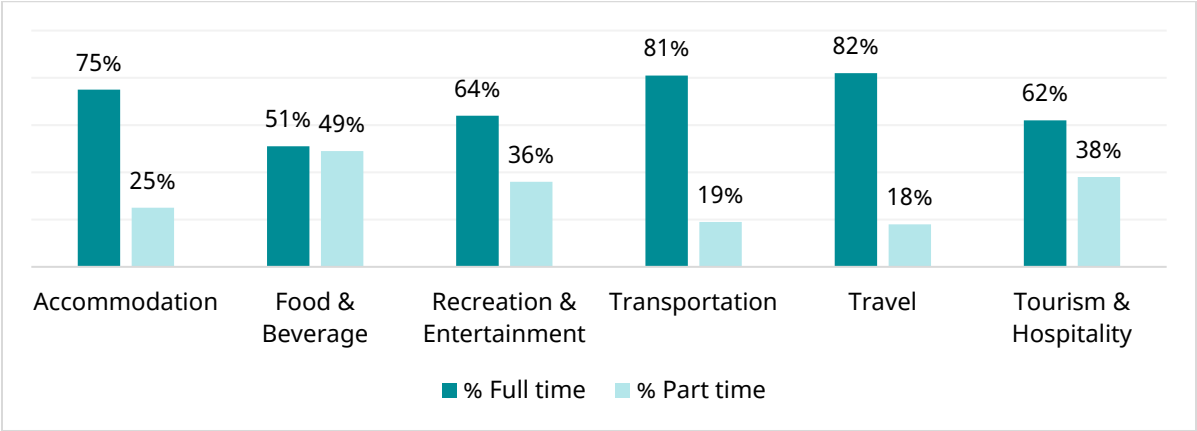


Source: THRC Employment Tracker, LFS Statistics Canada.

EMPLOYMENT STATUS AND WAGES

Approximately 62% of the workforce is employed on a full-time basis and 38% is employed part-time. The travel services and transportation industries have the highest percentage of full-time workers, while food and beverage services have the highest percentage of part-time workers; these patterns are consistent with the generalized distinctions emerging in the data of job-oriented versus career-oriented industries.

Figure 6: Job Status by Industry and Sector, 2022

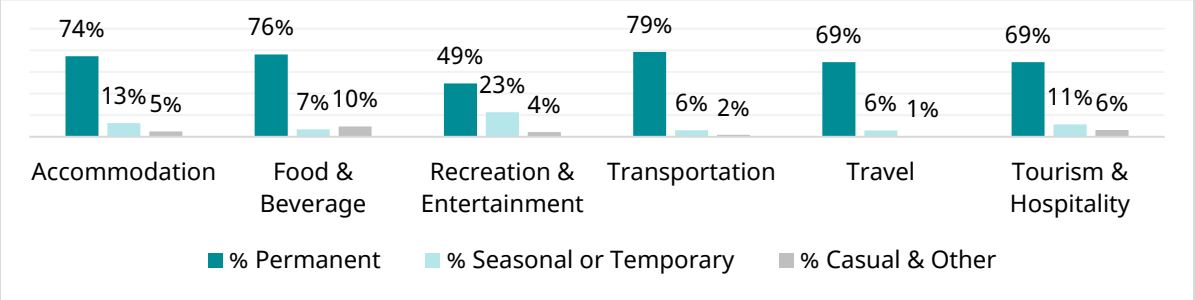


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

Permanent workers account for 69% of the workforce, while 17% are seasonal, temporary, or casual workers (the remaining 14% of the workers have an unknown status on the Labour Force Survey).

The transportation industry has the highest percentage of permanent employees (79%), whereas the recreation and entertainment industry has the highest percentage of seasonal employees (23%). Rates of permanent and temporary workers are broadly comparable across most industry groups, with the exception of recreation and entertainment, which has by far the highest percentage of non-permanent employees. This is the industry group that is probably the most affected by seasonal tourism, as it includes activities such as skiing, watersports, and other outdoor pursuits that are heavily dependent on weather and environmental conditions.

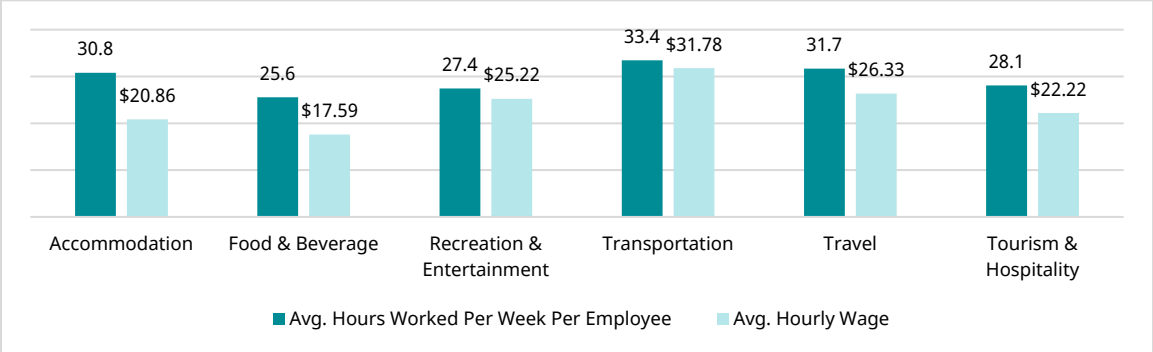
Figure 7: Employee Type by Industry and Sector, 2022



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 \$22.22 per hour and the average hours worked per week is 28, although these averages gloss over differences between salaried and waged employees, and between full-time and part-time jobs. Employees in the transportation industry work the most hours per week and are paid the highest average hourly wage, followed by travel services.

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 tourism sector workforce have been employed in their current positions for about seven years. The travel services industry has the longest average length of employment of approximately 11 years, while food and beverage services industry had the shortest average length of employment of approximately 5 years.

Table 3: Tourism Workforce Experience, Canada, 2022

Years of Employment	Accommodation		Food & Beverage services		Recreation & Entertainment		Transportation		Travel services		Tourism	
	#	%	#	%	#	%	#	%	#	%	#	%
Less than 1	30,028	21%	166,000	20%	88,528	17%	27,611	8%	4,639	12%	316,861	17%
1 to 2	29,194	20%	260,111	31%	102,889	20%	38,944	12%	5,361	14%	436,500	23%
2 to 4	26,806	18%	212,333	25%	106,361	21%	79,000	24%	6,167	16%	430,639	23%
5 to 7	21,333	15%	74,889	9%	58,556	12%	55,667	17%	6,056	16%	216,472	12%
8 to 10	10,806	7%	39,778	5%	40,028	8%	25,528	8%	2,639	7%	118,694	6%
11 to 15	8,333	6%	38,944	5%	38,972	8%	41,611	13%	3,278	9%	131,083	7%
16 to 20	5,111	4%	19,917	2%	26,111	5%	18,528	6%	4,667	12%	74,333	4%
Over 20	13,333	9%	25,861	3%	47,194	9%	43,278	13%	5,556	14%	135,250	7%
Total	144,917	100%	837,778	100%	508,611	100%	330,167	100%	38,333	100%	1,859,806	100%
<i>Avg. Length</i>	<i>7.3 years</i>		<i>4.9 years</i>		<i>8.0 years</i>		<i>9.8 years</i>		<i>10.9 years</i>		<i>6.9 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, along with the primary tourism industry in which those workers are employed, annual employment levels, and average wage rates.

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

NOC	Occupation ⁹	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	263,833	\$15.60	3.4
6513	Food and beverage servers	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	141,250	\$18.80	4.5
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	128,472	\$16.90	4.3
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	98,806	\$28.00	9.8
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	85,444	\$19.50	4.3
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	84,306	\$26.00	9.0
6611	Cashiers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	69,472	\$15.40	3.8
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	57,778	\$17.90	6.5

⁹ Detailed descriptions of these occupations can be found here:
<https://noc.esdc.gc.ca/Structure/Hierarchy?objectid=%2Fd0IGA6qD8JPRfoj5UCjpg%3D%3D>

NOC	Occupation ⁹	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
6722	Operators and attendants in amusement, recreation and sport	<ul style="list-style-type: none"> On-the-job training 	Recreation & Entertainment	53,389	\$18.10	4.6
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	49,583	\$21.00	9.0
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> On the job training 	Food & Beverage services	48,833	\$17.60	4.2
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	40,944	\$21.00	6.2
6731	Light duty cleaners	<ul style="list-style-type: none"> On-the-job training Certification for housekeeping room attendants or similar certification 	Accommodation	38,778	\$18.20	7.1
5131	Producers, directors, choreographers	<ul style="list-style-type: none"> Related post-secondary degree or diploma Extensive practical experience and training 	Recreation & Entertainment	34,000	\$37.00	9.4
6512	Bartenders	<ul style="list-style-type: none"> Responsible beverage service certification On-the-job training 	Food & Beverage services	25,306	\$19.60	5.5
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	17,778	\$17.70	5.5
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	16,694	\$38.00	11.7
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	15,528	\$18.80	5.2

NOC	Occupation ⁹	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
0621	Retail and wholesale trade managers	<ul style="list-style-type: none"> ▪ A university degree or college diploma in business administration or other field related to the product or service being sold may be required. ▪ Several years of related retail or wholesale sales experience at increasing levels of responsibility are usually required. 	Travel services	13,750	\$38.00	16.0
6733	Janitors, caretakers and building superintendents	<ul style="list-style-type: none"> • Some occupations in this unit group require previous cleaning and maintenance experience. • A journeyman/woman certificate in one or more of the trades or a building operator certificate may be required for building superintendents. 	Accommodation	13,056	\$20.00	6.6

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

GENERAL TRENDS IN TOURISM EMPLOYMENT

Jobs, and workers, in tourism tend to fall into one of two categories: part-time workers in industries that require little or no formal training or certification, and full-time workers in industries that do. Of course, this is a generalization: the picture becomes more complicated when all of the demographic characteristics of the workforce are taken into consideration together, but it does paint a picture of a sector with two very distinct pools of employment: those in jobs, and those in careers. The sector needs both. Career employees form the core of many tourism operations, bringing continuity and experience to the long-term running of a business. Job employees make up much of the workforce in seasonal enterprises and contribute enormously to the day-to-day operations of many businesses, particularly in hospitality and recreation. A healthy workforce has an appropriate balance of career- and job-oriented employees and is able to react fairly quickly to the staffing dynamics of the sector.

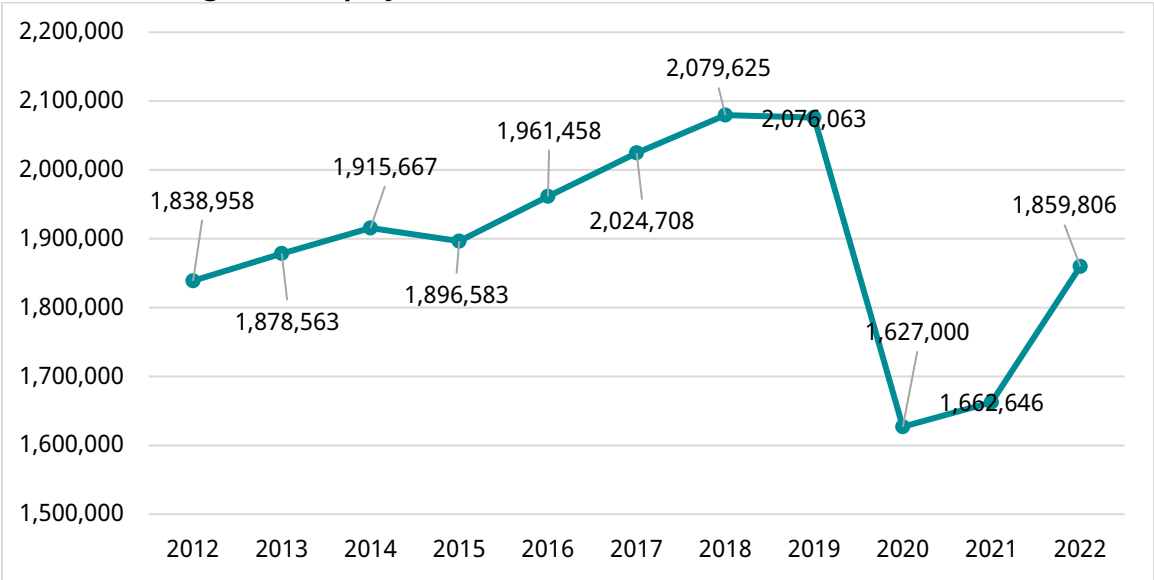
One of the effects of the Covid 19 pandemic was an exodus from the tourism workforce, which disproportionately affected the career-oriented sub-set. These are workers who are seeking stable, permanent, and reliable work – and the disruptions of the past few years has highlighted the volatility of the sector in response to global crises. Many of these workers, particularly those that have found employment in other sectors, are unlikely to return to their previous jobs in tourism, although those not currently working elsewhere may still be enticed back. However, their expectations in terms of working conditions and compensation have likely changed, making it potentially difficult for businesses to attract them. It will almost certainly become necessary to convert job-employees into career-employees, although the challenges posed by this are not insignificant. Work will need to be done to enhance the perception of a career in tourism, and a creative approach to compensation will likely need to be developed, to retain young people in the sector.

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 but declined with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels are 1,859,806 employees per month. This is well below the pre-pandemic trajectory, and although the figures have started to improve, there remains a substantial gap between current employment capacity and the labour demands of a sector in recovery. As people begin to travel again, labour shortages will continue to negatively impact customer experiences

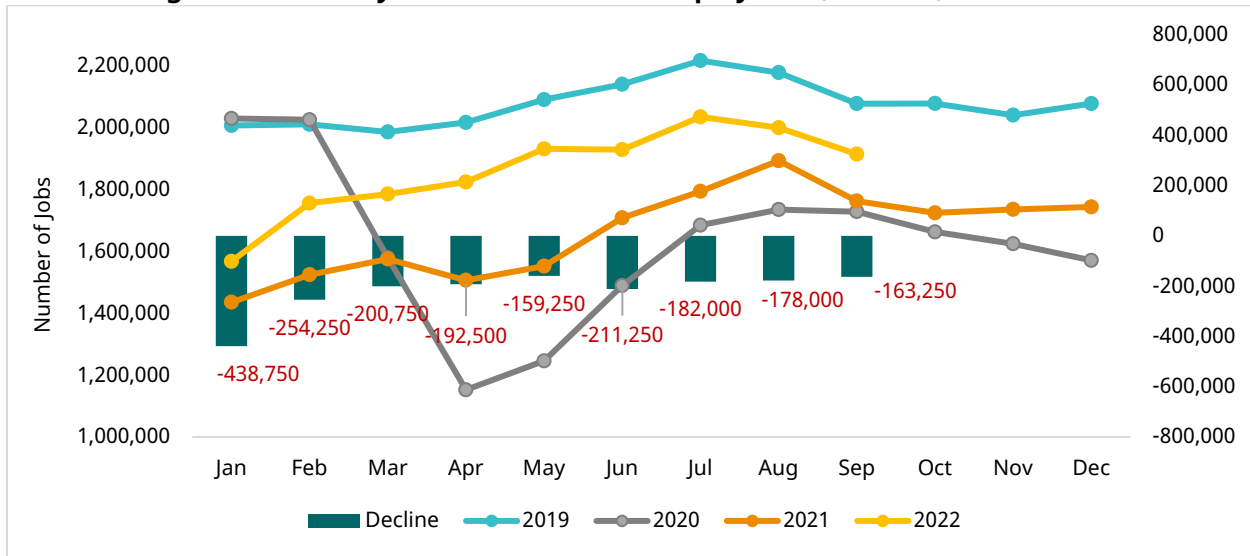
Figure 9: Employment: Canada's Tourism Sector, 2012 - 2022



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

The chart below compares average monthly employment from 2019 to 2022 and calculates the difference between average monthly employment levels in 2019 and 2022. As indicated, employment levels in 2022 remain below pre-pandemic levels (Figure 10, teal line), but there has also been consistent year-on-year growth.

Figure 10: Monthly Decline in Tourism Employment, Canada, 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 1% in the recreation and entertainment industry to losses of 31% in the travel services industry. It should be noted that, because travel services is a relatively small industry group in the context of the others in the sector, small changes in raw numbers can seem exaggerated when converted to percentages. Nevertheless, the performance across the different industry groups is noteworthy, as it suggests that people are spending more money locally (e.g., on 'staycations'), which supports local recreation and entertainment facilities more than the other sectors, which in turn allows such businesses to retain a larger staff. It may also reflect an uptick in people picking up part-time second jobs in industries that offer relatively high flexibility.

Table 5: Employment by Sector, Canada, 2019-2022

Employment	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	187,188	132,417	127,292	144,917	-29%	-32%	-23%
Food and Beverage services	969,313	761,708	789,792	837,778	-21%	-19%	-14%
Recreation and Entertainment	501,979	396,250	412,542	508,611	-21%	-18%	1%
Transportation	361,875	294,854	294,938	330,167	-19%	-18%	-9%
Travel services	55,688	41,771	38,083	38,333	-25%	-32%	-31%
Total	2,076,063	1,627,000	1,662,646	1,859,806	-22%	-20%	-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. The workers most likely to be displaced include younger workers (15 to 24 years, who also tended to be the least experienced), seasonal, temporary workers and workers with less formal education. 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. Since 2020, this effect has become more balanced. However, almost all employment levels except for those over the age of 65 remain below 2019 levels. The increase in older workers may be a reaction to larger economic instability, with retired people re-entering the workforce in response to financial pressures.

Table 6: Employment by Demographics, Canada, 2019-2022

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Job Status							
Full-time	1,299,208 (63%)	1,019,646 (63%)	1,018,729 (61%)	1,160,972 (62%)	-22%	-22%	-11%
Part-time	776,896 (37%)	607,396 (37%)	643,917 (39%)	698,861 (38%)	-22%	-17%	-10%
Permanent							
Permanent	1,422,188 (69%)	1,116,375 (69%)	1,149,375 (69%)	1,283,222 (69%)	-22%	-19%	-10%
Seasonal	124,333 (6%)	76,563 (5%)	87,604 (5%)	112,667 (6%)	-38%	-30%	-9%
Casual	125,500 (6%)	88,229 (5%)	80,125 (5%)	99,583 (5%)	-30%	-36%	-21%
Temporary	113,979 (5%)	78,167 (5%)	92,542 (6%)	100,611 (5%)	-31%	-19%	-12%
Gender							
Male	1,052,708 (51%)	839,021 (52%)	857,646 (52%)	949,278 (51%)	-20%	-19%	-10%
Female	1,023,396 (49%)	788,021 (48%)	805,000 (48%)	910,528 (49%)	-23%	-21%	-11%
Age Group							
15 to 24	679,354 (33%)	471,813 (29%)	507,146 (31%)	612,444 (33%)	-31%	-25%	-10%
25 to 34	430,688 (21%)	332,646 (20%)	340,917 (21%)	369,417 (20%)	-23%	-21%	-14%
35 to 44	338,750 (16%)	272,167 (17%)	259,688 (16%)	294,806 (16%)	-20%	-23%	-13%
45 to 54	299,396 (14%)	255,958 (16%)	251,042 (15%)	267,111 (14%)	-15%	-16%	-11%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
55 to 64	244,813 (12%)	223,563 (14%)	226,625 (14%)	229,361 (12%)	-9%	-7%	-6%
65 or above	83,083 (4%)	70,875 (6%)	77,354 (5%)	86,667 (5%)	-15%	-7%	4%
Education							
Below high school	310,729 (15%)	219,542 (13%)	244,292 (15%)	294,639 (16%)	-29%	-21%	-5%
High school or some post-secondary	726,938 (35%)	573,750 (35%)	557,083 (34%)	631,889 (34%)	-21%	-23%	-13%
Degree below bachelor's	614,896 (30%)	469,250 (29%)	488,604 (29%)	532,722 (29%)	-24%	-21%	-13%
Bachelor's degree or above	423,500 (20%)	364,604 (22%)	372,667 (22%)	400,528 (22%)	-14%	-12%	-5%

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

Employment figures have also fluctuated over the past three years in relation to the length of their employment in the tourism sector. There was a substantial year-over-year reduction in employees with less than one year experience as fewer new workers entered the sector during the Covid disruptions, alongside the more generalised decrease in line with broader decreases in employment. It is interesting to note that workers with 5 to 7 years of experience have seen a growth relative to 2019: this represents workers who had some experience (2 to 5 years) in the sector at the start of the pandemic, and who stuck it out through the difficult period that followed. These workers likely took on additional responsibilities as the workforce overall contracted, and it is very probable that many of them are approaching exhaustion and burnout: strong mental health supports will be needed to retain these valued workers through the coming years.

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	399,583	208,458	308,563	316,861	-48%	-23%	-21%
1 year	441,458	320,438	239,146	436,500	-27%	-46%	-1%
2 to 4 years	527,583	471,167	474,708	430,639	-11%	-10%	-18%
5 to 7 years	201,146	184,521	202,000	216,472	-8%	0%	8%
8 to 10 years	119,292	114,625	113,521	118,694	-4%	-5%	-1%
11 to 15 years	153,875	120,396	121,583	131,083	-22%	-21%	-15%
16 to 20 years	88,833	68,917	74,708	74,333	-22%	-16%	-16%
Over 20 years	144,271	138,479	128,500	135,250	-4%	-11%	-6%
Total	2,076,063	1,627,000	1,662,646	1,859,806	-22%	-20%	-10%
Avg. years	6.7	7.5	7.2	6.9	-	-	-

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 12% in 2020 but have been slowly improving since then. They have almost returned to 2019 levels, although distributed over a smaller workforce. Transportation has overall shown more stability than the other industry groups, although at this level of granularity of the data it is not possible to explore how the different industries within this group (e.g., air vs. ground vs. water transport) fared throughout the pandemic. The distribution of workers – and therefore also of work hours – has likely changed since 2019.

Table 8: Average Actual Hours Worked Per Week Per Employee, Canada (2019-2022)

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	31.1	26.1	29.8	30.8	-16%	-4%	-1%
Food and Beverage services	26.3	23.0	24.8	25.6	-13%	-6%	-3%
Recreation and Entertainment	27.5	24.1	28.3	27.4	-12%	3%	-0.4%
Transportation	33.2	29.3	32.3	33.4	-12%	-3%	1%
Travel services	32.4	27.1	27.6	31.7	-16%	-15%	-2%
Tourism	28.3	24.9	27.6	28.1	-12%	-2%	-1%

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

Hourly wages have also adapted in response to the twin pressures of Covid-related labour conditions and the more generalized instability of inflation and other related macro-economic and geo-political factors.

Table 9: Average Hourly Wage by Industry and Sector, Canada (2019-2022)

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	\$18.93	\$20.16	\$21.01	\$20.86	6%	11%	10%
Food and Beverage services	\$15.88	\$16.25	\$16.64	\$17.59	2%	5%	11%
Recreation and Entertainment	\$22.00	\$24.67	\$25.58	\$25.22	12%	16%	15%
Transportation	\$29.33	\$30.42	\$32.67	\$31.78	4%	11%	8%
Travel services	\$25.17	\$26.42	\$26.17	\$26.33	5%	4%	5%
Tourism	\$19.76	\$20.92	\$21.83	\$22.22	6%	10%	12%

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

Wages have overall increased relative to 2019, which is attributable to three factors:

1. An increase in average wage per position (including entry level positions);
2. Changes in the average level of experience within positions (e.g., more experienced workers tend to receive higher wages); and
3. Changes in the distribution of positions within the sector. For example, the sector had fewer entry level positions during the pandemic and, as a result, higher paid staff accounted for a greater percentage of sector employment. The drop in some industry groups between 2021 and 2022 reflects an increase in entry-level/front-line jobs being filled.

CHANGES IN EMPLOYMENT BY OCCUPATIONAL GROUP

The following table shows the change in employment of the leading occupations in the sector throughout the pandemic until now. Occupations that have grown relative to 2019 include those that lend themselves to independent contracting and entrepreneurial endeavours, such as landscaping and grounds maintenance (which has grown by 58%) and producers, directors and choreographers (which has grown by 56%). These increases may reflect vocational changes brought about by the work interruption and furlough schemes caused by the pandemic: with no recourse but self-employment, and a sudden surplus of free time to invest in artistic endeavours, careers may have been abruptly redirected by this moment of discontinuity.

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

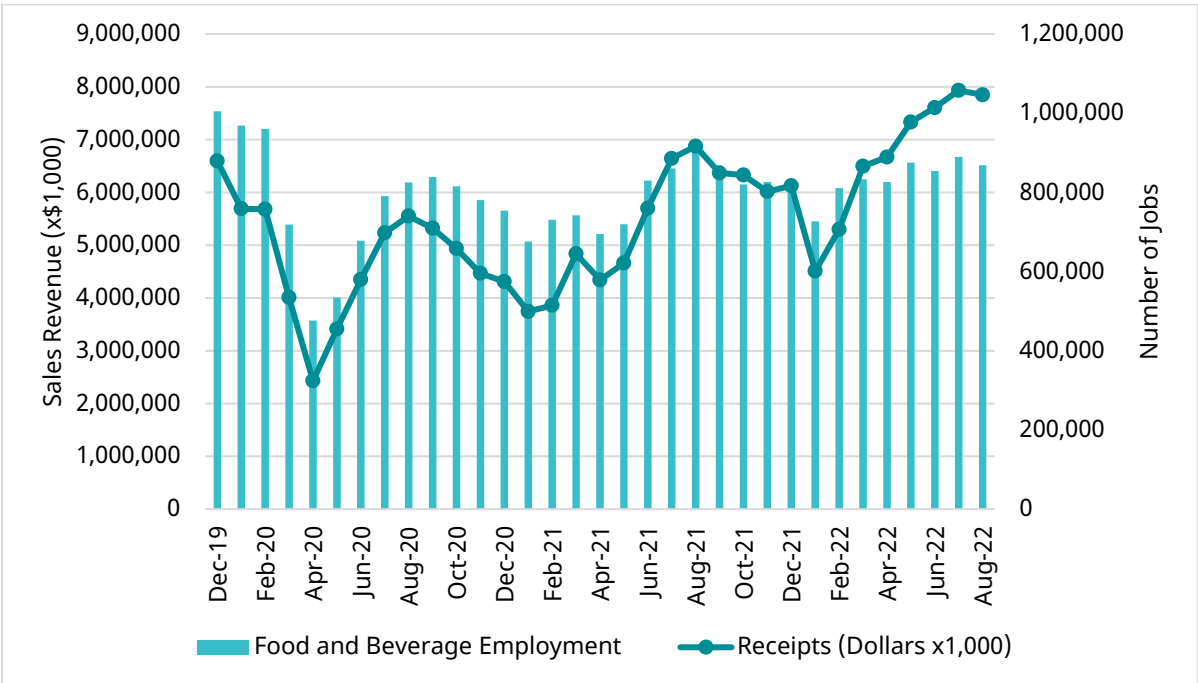
NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	283,354	227,833	257,688	263,833	-20%	-9%	-7%
6513	Food and beverage servers	185,771	108,896	101,021	141,250	-41%	-46%	-24%
6322	Cooks	161,646	122,521	128,458	128,472	-24%	-21%	-21%
0631	Restaurant and food service managers	111,396	93,958	89,104	98,806	-16%	-20%	-11%
5254	Program leaders and instructors in recreation, sport and fitness	92,250	61,958	61,604	85,444	-33%	-33%	-7%
7512	Bus drivers, subway operators and other transit operators	81,667	78,229	83,458	84,306	-4%	2%	3%
6611	Cashiers	77,208	56,042	55,417	69,472	-27%	-28%	-10%
6311	Food service supervisors	62,333	56,417	58,854	57,778	-9%	-6%	-7%
6722	Operators and attendants in amusement, recreation and sport	46,729	37,896	39,917	53,389	-19%	-15%	14%
7513	Taxi and limousine drivers and chauffeurs	66,958	53,854	45,354	49,583	-20%	-32%	-26%
6511	Maitres d'hôtel and hosts/hostesses	59,146	50,167	40,250	48,833	-15%	-32%	-17%
6321	Chefs	48,813	35,521	39,146	40,944	-27%	-20%	-16%
6731	Light duty cleaners	46,250	27,458	27,938	38,778	-41%	-40%	-16%
5131	Producers, directors, choreographers	21,854	22,875	30,104	34,000	5%	38%	56%
6512	Bartenders	35,333	18,438	19,604	25,306	-48%	-45%	-28%
6525	Hotel front desk clerks	23,125	17,500	21,521	17,778	-24%	-7%	-23%
0632	Accommodation service managers	23,417	24,271	19,125	16,694	4%	-18%	-29%
8612	Landscaping and grounds maintenance labourers	9,833	11,625	12,000	15,528	18%	22%	58%
0621	Retail and wholesale trade managers	20,354	14,542	15,333	13,750	-29%	-25%	-32%
6733	Janitors, caretakers and building superintendents	13,750	13,292	11,708	13,056	-3%	-15%	-5%

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 increased health and safety standards.

The following chart compares monthly food service and drinking places' revenues from December 2019 to August 2022 reported by Statistics Canada on employment levels for the food and beverage services industry, accessed via 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 March 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 Food Services and Drinking Places, Canada



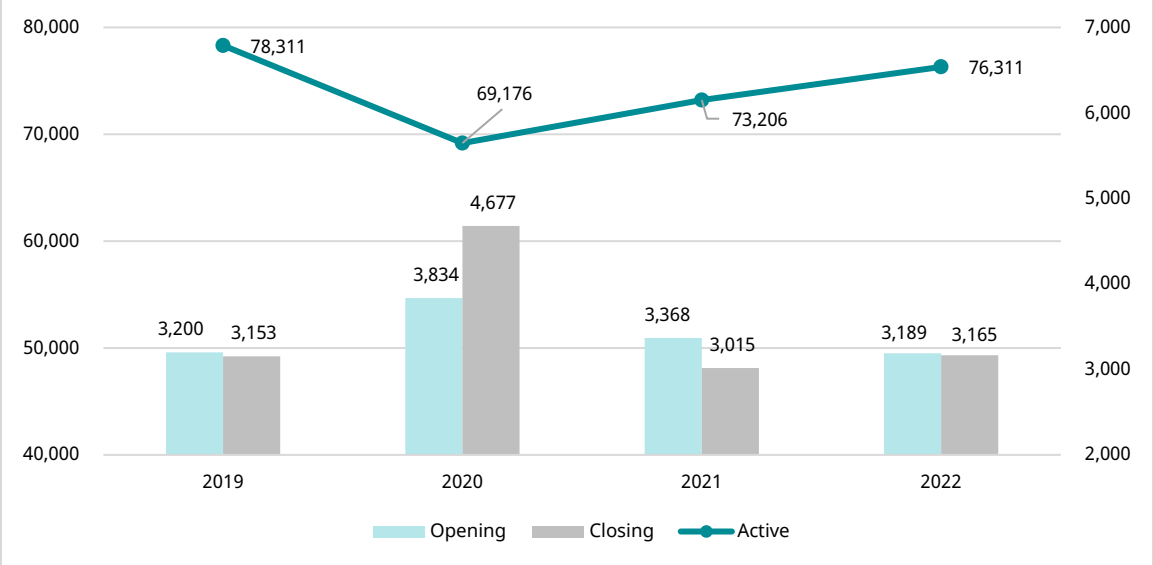
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000)

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 ratio of opening and closing businesses has returned to pre-pandemic levels, and the number of active businesses is continuing to grow although it remains below the pre-pandemic baseline.

Figure 12: Avg. Monthly Business Opening and Closures, Canada’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.¹⁰ 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 (e.g., educational services, Health care and social assistance, Professional, scientific and technical services, Retail trade).

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, Canada (2019-2022)

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	187,188	132,417	127,292	144,917	-54,771	-5,125	17,625
Food and Beverage services	969,313	761,708	789,792	837,778	-207,605	28,084	47,986
Recreation and Entertainment	501,979	396,250	412,542	508,611	-105,729	16,292	96,069
Transportation	361,875	294,854	294,938	330,167	-67,021	84	35,229
Travel services	55,688	41,771	38,083	38,333	-13,917	-3,688	250
Sector Totals	2,076,063	1,627,000	1,662,646	1,859,806	-449,063	35,646	197,160
Accommodation and food services (non-tourism)	53,292	47,771	40,625	48,889	-5,521	-7,146	8,264
Administrative and support, waste management and remediation services	712,417	661,063	669,583	671,556	-51,354	8,521	1,972
Agriculture, forestry, fishing and hunting	358,479	350,000	319,375	316,278	-8,479	-30,625	-3,097
Arts, entertainment and recreation (non-tourism)	15,604	12,021	11,646	10,833	-3,583	-375	-813
Construction	1,469,438	1,373,792	1,432,375	1,509,944	-95,646	58,583	77,569
Educational services	1,358,875	1,337,563	1,452,083	1,456,500	-21,313	114,521	4,417
Finance and insurance	843,604	904,479	946,521	968,139	60,875	42,042	21,618
Health care and social assistance	2,496,188	2,438,354	2,558,563	2,617,889	-57,833	120,208	59,326
Information and cultural industries	244,833	273,229	297,604	300,611	28,396	24,375	3,007
Manufacturing	1,740,396	1,672,646	1,735,271	1,749,722	-67,750	62,625	14,451
Mining, quarrying, and oil and gas extraction	266,521	236,021	256,854	268,806	-30,500	20,833	11,951
Other services (except public administration)	812,479	737,354	734,104	718,528	-75,125	-3,250	-15,576
Professional, scientific and technical services	1,537,313	1,528,438	1,673,979	1,783,639	-8,875	145,542	109,660
Public administration	1,000,688	992,542	1,065,500	1,118,778	-8,146	72,958	53,278
Real estate and rental and leasing	337,604	315,563	338,583	345,806	-22,042	23,021	7,222
Retail trade	2,197,729	2,070,375	2,185,958	2,270,889	-127,354	115,583	84,931

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Transportation and warehousing (non-tourism)	696,771	669,333	709,750	695,611	-27,438	40,417	-14,139
Utilities	140,313	138,000	140,792	147,667	-2,313	2,792	6,875
Wholesale trade	627,000	613,625	633,604	664,028	-13,375	19,979	30,424
Total Canadian Employment	18,985,604	17,999,208	18,865,438	19,523,917	-986,396	866,229	658,479

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 Canada’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 6.4%, which is consistent with the results of a recent survey conducted for Tourism HR Canada.¹¹ The leading industries in terms of growth are expected to be in accommodation and travel services.

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

Canada	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
Sector Totals	1,662,646	1,967,332	2,064,669	2,106,546	2,134,271	28.4%
<i>Year-over-year Growth</i>	-	18.3%	4.9%	2.0%	1.3%	6.4%
Industry						
Accommodation	127,292	175,422	186,946	189,533	191,553	50.5%
<i>year-over-year growth</i>	-	37.8%	6.6%	1.4%	1.1%	10.8%
Food and Beverage services	789,792	958,638	992,055	1,003,681	1,014,884	28.5%
<i>year-over-year growth</i>	-	21.4%	3.5%	1.2%	1.1%	6.5%
Recreation and Entertainment	412,542	452,044	481,255	492,312	501,562	21.6%
<i>year-over-year growth</i>	-	9.6%	6.5%	2.3%	1.9%	5.0%
Transportation	294,938	334,153	352,830	366,631	370,208	25.5%
<i>year-over-year growth</i>	-	13.3%	5.6%	3.9%	1.0%	5.8%
Travel services	38,083	47,076	51,583	54,389	56,064	47.2%
<i>year-over-year growth</i>	-	23.6%	9.6%	5.4%	3.1%	10.2%

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

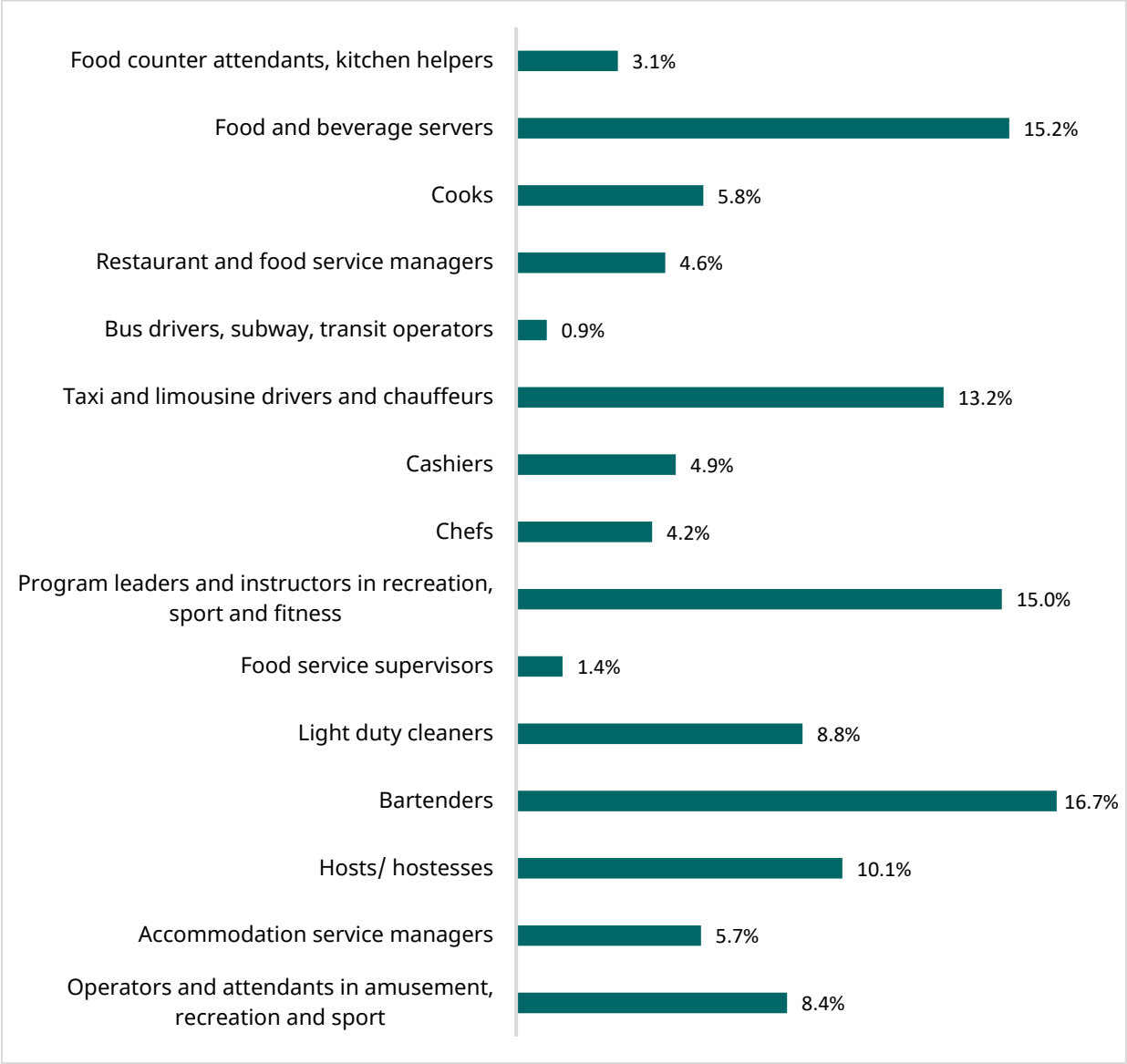
Of the 700 tourism employers surveyed, 29% are projecting employment to increase. The projected growth was attributed to improving business conditions (59% of employers indicated that current business and operating conditions have improved compared to the summer of 2021) and business expansion (53% of those employers who anticipate an increase in employment reported that their operations are growing). The survey also found that access to workers will constrain the rate of employment growth; 56% of employers indicated they think there is an insufficient number of qualified workers to meet their operation’s hiring needs.

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 Canada’s tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be bartenders, food and beverage servers, program leaders and instructors in recreation, sport and fitness, and taxi/limousine drivers and chauffeurs

Figure 13: Canada Tourism Projected 5-year compounded annual growth rates by 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>

MAJOR BUSINESS CHALLENGES FACING EMPLOYERS

The survey of 700 tourism employers conducted for Tourism HR Canada¹³ reported that 95% of employers are either currently facing business challenges, or have experienced business challenges in the last four months, which would impact on the future operations. As indicated below, in recent months, employers have been much more likely to be face issues related to inflation and labour than, for example, increasing competition:

- 77% are currently or recently experienced increased costs of production apart from labour costs (e.g., supplies, gas prices, etc.);
- 62% currently face or recently experienced labour issues (i.e., recruitment and retention challenges, skills shortages or increased costs);
- 42% currently face or recently experienced weak economic conditions in Canada;
- 39% currently face or recently experienced financial challenges;
- 29% currently face or recently experienced Government regulations/restriction - related to Covid-19;
- 28% currently face or recently experienced a lack of stable government funding;
- 19% currently or recently underwent digitization (i.e., adding technology or advance service delivery);
- 17% currently face or recently experienced increased competition; and
- 16% currently report or recently experienced inadequate marketing and/or promotional activities.

When asked about strategies or actions taken to offset these overall business challenges that employers currently face, 40% of employers surveyed indicated that they have raised prices for their products and services, 10% have delayed new investments, 9% have reduced non-labour costs such as advertising, 8% have reduced labour costs, and 7% have used multiple strategies.

CHALLENGES TO FILLING POSITIONS

Of the 700 businesses surveyed, 64% reported difficulties with employee recruitment, 46% had job vacancies (an average of six vacancies per employer) and 35% reported difficulties with employee retention.¹⁴ While the sector was already facing challenges in filling positions prior to the pandemic, the shortages have become much more acute since then. Some of the factors that may have accelerated staffing shortages include:

- *The prevalence of layoffs in the sector in 2020 and 2021.* Workers who are seasonal, female, younger, and/or have lower education levels were those more likely to experience job loss as a result of the pandemic. Many of these workers moved to other sectors where employment

¹³ Business Intelligence Survey, Labour Market Information, Tourism HR Canada, 2022

¹⁴ Tourism HR, Business Intelligence Survey, October 2022

was growing, such as retail and distribution, health care, and technology.¹⁵ Across Canada, a quarter million workers from the food & beverage services and accommodation industries had found work outside the sector by February 2021.¹⁶

- *Lower than normal returns of seasonal workers.* In 2021, 38% of seasonal tourism workers in B.C. returned to their position, down from 49% in a typical year.¹⁷ This has been particularly true amongst younger workers. Lucy Griffith, acting dean of Vancouver Community College's school of trades, technology and design, said that "throughout the pandemic, we have seen a big shift in students coming back looking for more stable careers than the jobs they held in sectors hit hard during the pandemic, such as tourism and hospitality."¹⁸
- *Wages are not keeping up with inflation and with other industries.* While average hourly wages for the sector increased by 13% from 2019 to 2021, much of that increase related to having fewer lower-level workers in the sector. People are unwilling to fill some jobs at prevailing wages, and research suggests that at a higher wage rate, there might not be the same intensity of shortages.¹⁹
- *Travel restrictions which caused challenges for recruiting international talent.* International travel restrictions made it much more difficult for employers to recruit foreign workers.²⁰ On October 1, 2022, the federal government announced the removal of all COVID-19 entry restrictions, including testing, quarantine and isolation requirements for anyone entering Canada. Prior to this date, these requirements made it challenging for employers to bring foreign workers to Canada during the pandemic.²¹
- *Access to training for employees.* Only 37% of businesses report having the capacity to provide required training to frontline workers, while only 30% report having the capacity to provide necessary training to supervisory/management staff. Due to the increased contact between employees and customers, a lack of customer service training can further worsen the feeling of helplessness and burnout among hospitality employees.
- *Some employees may feel undervalued.* According to a recent Economic Insight's report relating to the UK workforce landscape for the tourism sector, a major factor contributing to worker retention issues is workers feeling undervalued and that their skills and contribution are not adequately appreciated. While this is in part, no doubt, linked to pay, the evidence

¹⁵ <https://www.healthing.ca/business/help-wanted/worker-shortage-feature>

¹⁶ Briefing for National Policy Forum Priorities for Tackling Labour Challenges in Tourism
TIAC Tourism Congress | November 30, 2021

¹⁷ Go2HR. BC Tourism and Hospitality Labour Market Information (LMI) Research Project, 2022

¹⁸ Employees exert influence in B.C.'s pandemic-recovery workforce | Vancouver Sun

¹⁹ Go2HR. BC Tourism and Hospitality Labour Market Information (LMI) Research Project, 2022

²⁰ <https://hoteliersimard.ca/f/labour-crunch-bc-hotel-industry-works-to-make-hospitality-jobs?Blogcategory=Hiring>

²¹ <https://www.millerthomson.com/en/publications/communiqués-et-mises-à-jour/travail-et-emploi-communique/septembre-29-2022-2/employers-take-note-new-rules-for-foreign-workers-and-travel-to-canada/>

also suggests it is a function of: (i) training; (ii) development opportunities; and (iii) a general culture / perception of roles being of “low value.”²²

Given existing vacancies, the projected growth in employment, and the rates of permanent and seasonal staff turnover expected in the tourism sector, there will need to be significant numbers of new hires. The following table shows the top five most difficult positions for recruitment or retention of workers in the tourism sector, grouped by industry.²³

Difficult Occupations to Recruit/Retain Workers by Industry

Occupations	%	Occupations	%
Accommodation (n=135)		Food and Beverage Services (n=61)	
Housekeeping	78%	Food preparation/Cooks	70%
Maintenance	39%	Serving staff	51%
Customer service representatives/Sales	31%	Bartender	44%
Food preparation/Cooks	27%	Maintenance	28%
Serving staff	26%	Frontline Client-facing Supervisory staff	15%
Recreation and Entertainment (n=133)		Transportation (n=63)	
Customer service representatives / Sales	34%	Drivers	73%
Maintenance	28%	Other customer-facing staff	21%
Customer-facing staff (e.g., ushers/ ticket takers)	27%	Customer service representatives / Sales	17%
Food preparation / Cooks	27%	Administrative/Clerical	14%
Serving staff	19%	Pilots	13%
Travel Services (n=60)			
Travel agents	60%	Administrative/Clerical	22%
Sales and marketing	28%	Frontline Supervisory staff (those with customer-facing responsibilities)	22%
Tour planners	25%		

CHALLENGES TO ATTRACTING WORKERS

Limited awareness and understanding of the sector is a concern because negative perceptions are commonly held not only by prospective employees, but also by those who influence their employment decisions (e.g., parents, peers, teachers and employment counsellors). For example, in one study²⁴, scholars asked parents of young people (aged 13-24 years)²⁵ about their perceptions on tourism as a career, eliciting the following views from this group:

²² Economic Insight - Hospitality and Tourism workforce landscape: Annex | June 2019

²³ Tourism HR, Business Intelligence Survey, October 2022

²⁴ Auckland Tourism, Events and Economic Development, Young people’s perceptions of careers in tourism Industry, March 2018

²⁵ Parents were described as one type of youth influencer, through their own choices of work/career or through what they value (whether from a career perspective or more broadly).

- Many low-paid service roles;
- Many un/low-skilled roles;
- Questionable long-term viability working in tourism;
- Struggle to see a 'career' or career path in tourism;
- Constant travel to go where the demand for workers is; and
- High staff turnover/lack of job security.

This study also focused on understanding young peoples' attitudes and summarized a range of barriers perceived by youth to pursuing a career in tourism. Similar to the parent group, youth highlighted low pay, low-skilled roles and short-term roles as key barriers. Other barriers included:

- People aren't aware/don't immediately think of a career in tourism as an option;
- People focus primarily on the frontline, operational roles and don't understand the range of opportunities that exist;
- People in tourism and hospitality work antisocial hours;
- People in tourism must live where the work is;
- Tourism jobs have a low status; they involve serving others and not being served;
- Tourism is a second-class subject at secondary level; and
- Tourism is intimidating/uncomfortable for those who don't like dealing with people.²⁶

Some of these perceptions have also been echoed with other audiences when asking about their perceptions about the tourism sector more broadly. That is, in a recent survey²⁷, Canadians who had left the tourism sector because they wanted to change in career or had other/better career opportunities indicated that career opportunities are lacking in tourism as wages are not competitive (25%). Other studies identified negative perceptions about hospitality employees' work experience and quality of life. A national survey of 927 workers in the sector highlighted that one-third of hospitality employees expressed negative feelings about their hospitality work experience including their workload, not having enough time to care for their family, inadequate time off, and a lack of a work life balance.²⁸

APPEAL OF THE SECTOR

Recognizing that conditions can vary widely from target group to target group, sector to sector, and employer to employer, one research study found that, of 927 workers surveyed, about one-third agreed that hospitality jobs provide an above average income, job security, more advantages than disadvantages, and satisfactory career advancement opportunities.²⁹

²⁶ Parents were described as one type of youth influencer, through their own choices of work/career or through what they value (whether from a career perspective or more broadly).

²⁷ General Population - Perceptions of Working in Tourism - October 2022

²⁸ The state of the hospitality industry 2021 employment report: COVID-19 labor force legacy (University of Central Florida - national survey of 927 workers in the industry)

²⁹ The state of the hospitality industry 2021 employment report: COVID-19 labor force legacy (University of Central Florida - national survey of 927 workers in the industry)

The top reasons Canadians choose to work in the tourism sector as identified by THRC survey data include:³⁰

- It offers temporary/summer employment for me while in school (37%);
- It is well suited to my skills and interests (23%);
- It is well suited to my personality (23%);
- It is a temporary job while I search for new employment opportunities (22%);
- The working environment is pleasant (21%);
- There is flexibility in work hours (20%); and
- There is flexibility in shifts (ex. evenings/weekends/holidays) (18%).

Research suggests that, although some influencers (i.e., career advisors and parents) and young people perceive barriers/challenges with pursuing a career in tourism, they also see a growing sector with many job opportunities.³¹ Motivators to pursuing a career in tourism, as identified by youth, include:³²

- The opportunity to be involved in a sector that showcases the country;
- Tourism is a global sector;
- Tourism offers variety, something different every day, the work is fun, exciting, interesting and flexible;
- Tourism is inspirational to others; and
- Tourism offers opportunities to all.

THRC survey data³³ found that 70% of Canadians would agree that working in the tourism sector has allowed them to gain valuable communication and interpersonal skills, and 67% would agree that working in tourism provides valuable work experience. Canadians who have never worked in the tourism sector most commonly noted that they had other/better career opportunities (43%), they were never interested in a career in tourism (39%), and the sector is not well-suited to their skills and interests (28%) or to their personality (17%).

³⁰ General Population - Perceptions of Working in Tourism - October 2022

³¹ Auckland Tourism, Events and Economic Development, Young people's perceptions of careers in tourism Industry, March 2018

³² Auckland Tourism, Events and Economic Development, Young people's perceptions of careers in tourism Industry, March 2018

³³ General Population - Perceptions of Working in Tourism - October 2022

4. STRATEGIES TO MEET LABOUR DEMAND

DIFFERENCES ACROSS TARGET GROUPS

A profile of population groups who could be targeted to fill the shortages is included in the following table. The table also illustrates some of the similarities and differences that exist across the major target groups who are currently working, or potentially could work, in the tourism sector, and an estimate of the number of people within that segment who are currently working in the sector in Canada. While there are some commonalities across all demographic groups, there are also some differences that highlight the need for carefully strategized recruitment campaigns, tailored to the specific needs of particular group(s) of potential employees.

Segment	Existing Employment ³⁴	Characteristics ³⁵
15 to 24 years	612,000 (33%) ³⁶	<ul style="list-style-type: none"> • Most youth aged 15-24 are willing to work on a seasonal basis (with spring and summer being the favorite). • Although most respondents agreed that jobs in tourism are attractive, most felt they do not offer long-term employment stability. • Of those that work in tourism and hospitality, most respondents decided to work in the sector for temporary/summer employment while in school. • Those who do not work in the sector have not considered a career in tourism as it does not align with their skills and interests or feel that wages are not competitive; however, they would be willing to work in tourism for higher pay and more opportunities for career advancement.
25 to 34 years	369,000 (20%)	<ul style="list-style-type: none"> • Most respondents aged 25-34 are not willing to work on a seasonal basis. • Although most respondents agreed that jobs in tourism are attractive, most felt they do not offer long-term employment stability. • Of those that work in tourism and hospitality, most respondents decided to work in the sector for temporary/summer employment while in school or as a

³⁴ Includes Canadian who are currently employed in tourism & hospitality (2022) (except for the “Former Employees” figure which includes only unemployed individuals who last worked in tourism & hospitality). Data taken from statistics Canada.

³⁵ Pulled from the literature and the Tourism HR Canada – 2022 General Population data, 2022

³⁶ By way of example: in 2022, the annual average of tourism sector employees was 1,838,958 individuals of which 612,000 were between the ages of 15 to 24.

Segment	Existing Employment ³⁴	Characteristics ³⁵
		<p>temporary job while searching for new employment opportunities.</p> <ul style="list-style-type: none"> Those who do not work in the sector noted that it either does not align with their skills and interests or feel that wages are not competitive; however, would be willing to work in tourism for higher pay and greater benefits.
Indigenous people	92,000 (5%)	<ul style="list-style-type: none"> Respondents in this group were equally mixed in terms of their willingness to work on a seasonal basis (with spring and autumn being the favorite). Although most respondents agreed that jobs in tourism are attractive, most felt that they do not offer long-term employment stability. Of those that work in tourism and hospitality, most respondents decided to work in the sector since it was well suited to their skills and interests or their personality. Most respondents who do not work in the sector said they never considered a job in tourism and hospitality; however, would be willing to work in tourism for higher pay and travel benefits.
Visible minorities	493,000 (27%)	<ul style="list-style-type: none"> Respondents in this group were equally mixed in terms of their willingness to work on a seasonal basis (with summer and spring and autumn being the favorite). Of those that work in tourism and hospitality, most respondents decided to work in the sector as a temporary job while they searched for new employment opportunities. Most respondents who do not work in the sector said they had other/better career opportunities or was never interested in a career in tourism, however, would be willing to work in tourism for higher pay and travel benefits.
Newcomers to Canada	81,000 (4%)	<ul style="list-style-type: none"> Most newcomers are willing to work on a seasonal basis (with spring and summer being the favorite). Although most respondents agreed that jobs in tourism are attractive, most felt they do not offer long-term employment stability. Of those that work in tourism and hospitality, most respondents decided to work in the sector due to the flexibility in work hours and shifts. Those who do not work in the sector noted that a career in tourism does align with their skills and interests, however,

Segment	Existing Employment ³⁴	Characteristics ³⁵
		would be willing to work in tourism for higher pay and greater benefits.
Former employees	100,000 (5%)	<ul style="list-style-type: none"> Although most respondents agreed that jobs in tourism are attractive and provide valuable experience, most felt they do not offer long-term employment stability and family life is negatively affected for people working in the tourism sector due to the nature of work. Respondents are less willing to work at a job that is only available for part of the year. Respondents are not as likely to recommend a career in the food and beverage services as they would in other areas of tourism.
Older workers 55+	316,000 (17%) (86,000 over 65)	<ul style="list-style-type: none"> Older workers are expressing increasing interest in staying in the labour market for longer, particularly when they have the opportunity for flexible work schedules.
Non-related Careers	449,000 (23%)	<ul style="list-style-type: none"> The skills of these employees are readily transferrable across industries. Most respondents felt the pay was low for most jobs in the tourism industry Respondents in this group were equally mixed in terms of their willingness to work on a seasonal basis (with spring and autumn being the favorite).

COORDINATED ACTIONS THE SECTOR CAN TAKE

In the Business Intelligence Survey of 700 business representatives³⁷, when asked to provide recommendations to improve or better support the tourism labour market, survey respondents felt the biggest impact would come from focusing on:

- government funding for the sector/grants (10%);
- more competitive/higher wages (7%);
- recruitment of staff (6%); and
- lifting of the COVID-19 restrictions (5%).

Many surveys and studies (e.g., in the UK, Australia and New Zealand) have led to the development of sector strategies or recommendations to promote employment in tourism and hospitality. Some of the common elements of these strategies or recommendations include:

- *Addressing perceived disadvantages and misconceptions:* using real life examples of people working across the tourism sector to counter perceptions that all jobs are low-status, poorly

³⁷ Tourism HR, Business Intelligence Survey, October 2022

paid, 'easy' (i.e., not challenging, 'for those who can't do better'), isolating and antisocial, uncertain/unreliable and limiting in nature.³⁸

- *Addressing structural barriers*: ensuring disability inclusiveness, reducing hurdles and complexity to attain visas, assisting small businesses in regional areas to employ young people in the communities, increasing childcare places and reducing the cost of childcare.^{39,40}
- *Raising wages or enhancing career benefits across the sector*: this type of blanket solution across the sector for lower paying jobs may induce a ripple effect for relative compensations in other but slightly higher-paying hospitality jobs.⁴¹
- *Promoting the tourism sector via a wider approach*: to change perceptions of the tourism sector, promote careers and support the sector's efforts to attract investment, build social license and achieve other objectives.⁴²
- *Engaging the influencers*: through outreach programs, young people's most important influencers are parents and teachers, but these influencers may have limited or outdated information about what the sector offers: they are unable to advise on what they're unsure of themselves.⁴³
- *Leveraging social media and advertising*: highlighting the competitive advantages, emphasizing the tourism sector as one that you can have a long-term career in and enjoy perks such as travel, health benefits etc.^{44,45}
- *Training and education*: offering low-cost short courses for upskilling and retraining.^{46,47}

Recognizing the significance of the issue, various government agencies and tourism focused organizations and associations have been implementing different types of initiatives to help businesses recover from the impacts of COVID-19 and to support the development of a tourism workforce. Some examples include the following:

³⁸ Auckland Tourism, Events and Economic Development, Young people's perceptions of careers in tourism Industry, March 2018

³⁹ Tourism and Hospitality Workforce Survey Report, Deloitte Access Economics, South Australian Tourism Commission, August 2021 (surveyed 556 businesses)

⁴⁰ Economic Insight - Hospitality and Tourism workforce landscape: Annex | June 2019

⁴¹ The state of the hospitality industry 2021 employment report: COVID-19 labor force legacy (University of Central Florida - national survey of 927 workers in the industry)

⁴² Auckland Tourism, Events and Economic Development, Young people's perceptions of careers in tourism Industry, March 2018

⁴³ Auckland Tourism, Events and Economic Development, Young people's perceptions of careers in tourism Industry, March 2018

⁴⁴ Tourism and Hospitality Workforce Survey Report, Deloitte Access Economics, South Australian Tourism Commission, August 2021 (surveyed 556 businesses)

⁴⁵ NZ proposes establishment of workforce standards in tourism sector | HRD New Zealand - <https://www.hcamag.com/nz/specialisation/corporate-wellness/nz-proposes-establishment-of-workforce-standards-in-tourism-sector/416397>

⁴⁶ Tourism and Hospitality Workforce Survey Report, Deloitte Access Economics, South Australian Tourism Commission, August 2021 (surveyed 556 businesses)

⁴⁷ NZ proposes establishment of workforce standards in tourism sector | HRD New Zealand - <https://www.hcamag.com/nz/specialisation/corporate-wellness/nz-proposes-establishment-of-workforce-standards-in-tourism-sector/416397>

- **Tourism HR Canada - Pan-Canadian Task Force Creating Framework and Tools to Alleviate Workforce Shortages and Skills Gaps⁴⁸:** Tourism HR Canada and the Tourism Workforce Recovery and Growth Task Force will identify specific workforce-related issues impacting the Canadian tourism sector's ability to meet increasing demand and will provide direction and tools to address them. These resources will ensure a sustained supply of skilled tourism workers across the country, as well as equip tourism businesses with the expertise to develop progressive HR policies and business practices. Among the initiatives are a comprehensive attraction and retention strategy; recovery programs and services for reskilling and upskilling; a digitalization strategy to enhance business resilience; tools to help employers manage new HR demands; and continued workforce/labour market research to inform strategies. The work will align with key existing and incoming national, regional, and local labour market plans and strategies, including the Federal Tourism Growth Strategy and the United Nations Sustainable Development Goals. Specific attention will be given to Indigenous tourism workforce development.
- **Hotel Association of Canada, together with its project partner Tourism HR Canada, - Destination Employment:⁴⁹** In order to address the sector's labour shortage, the Hotel Association of Canada, together with its project partner Tourism HR Canada, has partnered with the Government of Canada to build a bridge program that will mobilize new Canadians into available hotel jobs. With \$7 million in funding provided by Immigration, Refugees and Citizenship Canada (IRCC), Tourism HR Canada and the Hotel Association of Canada, alongside other provincial and local labour market partners, will work together to employ newcomers in sustainable, long-term hotel jobs. This project is an important one for both the government and the accommodation sector because it provides a labour solution to a long-standing shortage, while offering new Canadians meaningful and stable employment.
- **Go2HR - Communications/engagement campaign designed to attract and retain workers in the B.C. tourism and hospitality sector:** Go2HR has secured funding from PacifiCan's Tourism Relief Fund (TRF) to undertake a communications/engagement campaign designed to attract and retain workers in the B.C. tourism and hospitality sector. Patio and Pace Creative will lead the development of a communications plan (messages, positioning, tactics, etc.) and program execution (e.g., media buy and development of materials for web, ads, social media, etc.).
- **Hospitality Newfoundland and Labrador - 'We Are Tourism' Campaign:⁵⁰** Hospitality Newfoundland and Labrador is raising the profile of the sector with their new multimedia advocacy campaign, "*We Are Tourism.*" The campaign focuses on establishing the tourism sector as not only economically valuable to the province and to the many people it employs, but also showcases the vital role it plays in improving the quality of life for all.
- **UK coalition of progressive businesses - Hospitality Rising:⁵¹** A recruitment campaign designed to attract new talent to the United Kingdom's tourism and accommodation sector. The multi-channel partnership campaign highlights operations and employment opportunities to backfill a large volume of vacancies.

⁴⁸ Taking Action to Address the Tourism Labour Crisis - Tourism HR Canada. <https://tourismhr.ca/2022/10/03/taking-action-to-address-the-tourism-labour-crisis/>

⁴⁹ Destination Employment: Project Highlights - Hotel Association of Canada: http://www.hotelassociation.ca/destinationemployment/highlights/?_ga=2.114513039.989737792.1667164196-2127454807.1666838271

⁵⁰ <https://hnl.ca/hospitality-newfoundland-and-labrador-launches-new-we-are-tourism-campaign/>

⁵¹ <https://hospitalityrising.org/>

- **The City of Cincinnati - The Cincy USA Certified Tourism Ambassador™:**⁵² The Cincy USA Certified Tourism Ambassador™ Program is part of a national customer service certification program created to increase tourism by inspiring front-line hospitality employees and volunteers to turn every visitor encounter into a positive experience. When they receive quality service, visitors (convention attendees, leisure and business travelers, etc.) are more likely to have positive experiences; and importantly, are more likely to return in the future, and to share their positive experiences with their networks.
- **Skills Canada – Nova Scotia (SCNS):**⁵³ Try-A-Trade® Take-Out offers teachers and students the opportunity to conduct activities and gain hands on experience in different areas of skilled trades and technologies (including those in the hospitality sector) from their classrooms. This free program offers a snapshot into a variety of skilled trade and technology areas, through engaging activities and additional insights from sector professionals – giving students an opportunity to safely explore careers in a hands-on and fun way.
- **Policies targeting foreign workers:** B.C. Restaurant and Foodservices Association (BCRFA) has asked the provincial government to exempt B.C. employers from having to apply for a Labour Market Impact Assessment (LMIA) for a two-year period.⁵⁴ BCRFA is calling on Ottawa and the B.C. government to implement an initiative similar to the Atlantic Immigration Program, which streamlines the entry of skilled foreign workers into provinces to meet labour demand. The Hotel Association of Canada is also working to bring about improvement in foreign worker programming.

ACTIONS THAT INDIVIDUAL EMPLOYERS CAN TAKE

Business owners in the tourism sector are among the first to experience the effects of economic and social instability,⁵⁵ which includes the challenge of worker shortages. One strategic high-level approach that businesses can take is to identify which positions in the business need career-oriented workers, and which are more appropriately suited to job-oriented workers. Recognizing that certain key positions will need to be held by career-employees, businesses can identify job-oriented workers who may be open to a career path, and offering appropriate supports (in terms of training, compensation, and clear paths to progression) in making that transition. While this approach does not address short-term labour shortages in for example front-line staff, it does strengthen the core team that will ensure business continuity: supervisors end up being well-versed in the running of the business and the positions that they are responsible for, and recruitment drives can focus on positions that are easier to fill (e.g. those that do not require much previous experience in the sector). This kind of succession planning – of looking carefully at existing staff that can be enticed to stay on a career path – is one way to manage longer-term staff shortages.

⁵² Cincy USA Tourism Ambassador Program / CincyUSA.com

⁵³ 2021_SCNS_Partnership-Package.pdf (skillsns.ca)

⁵⁴ <https://www.bcrfa.com/expressentry>

⁵⁵ <https://hiring.monster.com/resources/recruiting-strategies/talent-acquisition/5-ways-to-attract-leisure-and-hospitality-candidates/#:-:text=One%20of%20the%20best%20ways%20to%20manage%20the,free%20on%20Monster%20and%20attract%20the%20best%20candidates.>

A number of other strategies have also been developed to attract new workers and to retain them in the sector. According to a Hotel Association of Canada member labour survey⁵⁶, hoteliers have tried to manage staff shortages by:

- Increasing wages (90%);
- Deploying staff for jobs they were not hired for (73%);
- Limiting the number of available rooms (70%);
- Raising rates because of higher labour costs (70%); and
- Refusing bookings (46%).

Some reports have focused on providing suggestions to employers on how to continue to attract employees despite the economic and social fluctuations.⁵⁷ For example, one author highlighted the following strategies for attracting leisure and hospitality candidates:

- *Target candidates seeking non-traditional schedules.* For example, teachers who don't work during the summer often look to supplement their income which makes seasonal work an ideal fit. Similarly, college students who attend classes during the day may be attracted to evening and weekend shifts to accommodate their schedules.
- *Use the company's products and services to provide generous perks.* Highlighting perks in the job description, including allowing employees' friends and family to enjoy VIP experiences at the restaurants and hotels where they work, and allowing workers to enjoy free meals, can attract more applicants and make a job more appealing. This is also an advantage for business owners because it saves the business from paying traditional employment taxes since discounted room rates, free meals, or complimentary admission to entertainment venues are considered nonpayroll compensation.
- *Highlight workplace culture.* Tourism sector workers want to feel a part of a company culture where they enjoy working and feel valued and supported. This means that businessowners who take deliberate steps towards creating an attractive company culture have a competitive advantage. In-person hiring events and job descriptions are effective places to showcase business culture such as the company's vision, mission and philosophy for how to serve customers, so potential workers can understand the big picture and their role in the business.
- *Create or update the employee referral program.* Having an employee referral program can significantly reduce the time and cost of recruitment. Employee-referred job candidates are usually a good cultural fit, which may mean less of a turnover. Cash bonuses for the new hire and the employee after a pre-defined time on the job are common rewards for high-quality referrals.
- *Consider a different compensation model.* Restaurant owners who consider a salaried front-of-house staff immediately gain an advantage for attracting top talent. Salaried front-of-house staff create a better customer experience because they are not focused

⁵⁶ HAC, (2022). Labor Policy Update, Susie Grynol, President and CEO

⁵⁷ <https://hiring.monster.com/resources/recruiting-strategies/talent-acquisition/5-ways-to-attract-leisure-and-hospitality-candidates/#:-:text=One%20of%20the%20best%20ways%20to%20manage%20the,free%20on%20Monster%20and%20attract%20the%20best%20candidates.>

on “turn and burn” tactics that rush diners so that the server can seat more customers and earn more tips. Other compensation models include profit sharing or bonuses for meeting business goals, which also serve as incentives that attract and retain employees who work hard and serve customers with the highest standards.

Recent literature⁵⁸ aimed at helping employers attract workers in a post-pandemic environment also suggests the use of diverse marketing strategies, with honed and consistent messaging to recruit the best candidates for job opportunities. These could include:

- *Familiarization Tours:* Tours for job seekers to learn about the company and experience what it’s really like as an employee. This can include a day job-shadowing an employee, interviewing managers, or attending in-house corporate training sessions.
- *Job Postings:* In job ads, it is important to describe what would distinguish a top applicant from the competition.
- *Enlisting Staff:* Enlist the help of existing staff and encourage referrals of their family and friends and include a referral bonus to recognize their efforts.
- *Networking:* Stay connected and reach out to previous employees, who may be open to casual or part-time work, and may know others seeking employment.
- *Castig a wider net:* reach out via social media platforms and posting job ads in local community gathering places.
- *Hiring talent recruitment services:* Rely on experts to help fill roles, which is often more cost effective than trying to do this without help.
- *Being active in organizing and attending job fairs:* Work closely with schools to gain privileged access to students or graduates.

Similarly, as highlighted by 447 recently surveyed businesses⁵⁹, strategies that have been commonly used by employers to **attract** employees include:

- Increasing recruitment efforts (30%);
- Improving wages, benefits, perks, etc. (22%);
- Using word of mouth (friends, family, local community) to try and fill job vacancies (19%);
- Using social media (15%);
- Providing flexible working conditions (14%); and
- Improving work-life balance (13%).

While most businesses (77%) indicate that they are not using targeted recruitment practices for individuals from equity seeking groups, of those that are (16%), the equity seeking groups that they target the most are Indigenous peoples (40%), members of visible minorities (38%), people with disabilities (33%), women (22%), and members of LGBTQ2 communities (22%).⁶⁰

Strategies that have been commonly used by employers to **retain** employees⁶¹ include:

⁵⁸ THRC Now Hiring: A Guide to Help Employers Attract and Retain Workers in a Post-Pandemic Environment, 2022

⁵⁹ Tourism HR, Business Intelligence Survey, October 2022

⁶⁰ Tourism HR, Business Intelligence Survey, October 2022

⁶¹ Tourism HR, Business Intelligence Survey, October 2022

- Improving wages, benefits, perks, etc. (60%);
- Providing increased flexibility to workers (25%);
- Creating a culture of work/life balance (22%);
- Creating a more inclusive workplace for underrepresented employees (15%); and
- Providing additional growth opportunities (15%).

Research on employee perceptions of employers⁶² has highlighted some important practical and managerial considerations for managing employer attractiveness and branding in tourism and hospitality. This research highlights factors contributing to employee retention in tourism and hospitality, such as:

- *Employee Involvement:* Tourism and hospitality companies could strengthen their employer attractiveness by giving employees flexibility and responsibility to, for example, develop new services, test new concepts, decorate the lobby or other common spaces, or try new ideas with signage and product display.
- *Social Value:* Although social value had some positive influence on the intention to recommend the company to others, it is possible that good relationships with colleagues and a positive atmosphere at work are more of a hygiene factor (i.e., they can deter applicants when they are absent, but cannot on their own increase a worker's likelihood to stay).
- *Economic value:* The economic value (in terms of total monetary and non-monetary compensation) is important both for employees' intention to stay with their employer and their likelihood to recommend the company as a place to work.
- *Brand Image:* With help of employer branding, companies could create a differentiated brand image based on values related to creativity and innovation. Thereby, they could attract employees with a similar mindset and then enforce these values internally with suitable branding and human resource management (HRM) practices. This could create value to the employees and strengthen the service brand further, as employees have the tools to create individual and specialized services in each customer encounter.

⁶² Styven M et al. Employee Perceptions of Employers' Creativity and Innovation: Implications for Employer Attractiveness and Branding in Tourism and Hospitality, 2022

