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SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET



Provincial Report Series: New Brunswick



Prepared for:

Tourism HR Canada

Prepared by:

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Published February 2023

By Tourism HR Canada

ISBN 978-1-55304-787-2

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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.

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

Funded by the Government of Canada.

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

New Brunswick's tourism sector is comprised of companies which provide accommodation, food and beverage services, recreation and entertainment, transportation, and travel services. The province is best known attractions like Kings Landing, the New Brunswick Botanical Garden, Roosevelt Campobello International Park, Acadian Historical Village and Hopewell Rocks Provincial Park.¹ New Brunswick attracts visitors to its ski hills, vibrant towns, Moncton, has more than 60 lighthouses and an inland lighthouse systems and saltwater beaches. The province is also known for two major national parks including Fundy National Park and Kouchibouguac National Park.

New Brunswick's tourism sector was expanding prior to the pandemic and tourism visitor spending was estimated at \$1.3 billion.² When the COVID-19 pandemic hit the province, the tourism sector was impacted and strategies to grow the sector were put to a standstill. In 2021, there was a total of approximately 3 million Canadian visits to the province compared to 4.5 million visits in 2019. In 2021, there was a total of 94,500 visitors from the U.S. compared with 255,400 in 2019.³ To resume the work towards expanding the sector, on April 4, 2022, New Brunswick released a five-year tourism strategy which aims to make the province the top vacation destination for visitors in Atlantic Canada. The new vision is called "The Invitation", which is about letting people know they're invited to New Brunswick and highlights the province as the best place to visit, live, and build businesses.⁴

¹ <https://www2.gnb.ca/content/dam/gnb/Departments/thc-tpc/pdf/Publications/2019-2020-annual-report.pdf>

² <https://www2.gnb.ca/content/dam/gnb/Departments/thc-tpc/pdf/Publications/TourismGrowthStrategy20182025.pdf>

³ https://dashboard.tourismnewbrunswick.info/?_gl=1*8gya9l*_ga*OTgyMjU3NjcuMTY2ODM1ODQwMA..*_ga_L3HJKTYVG9*MTY2ODM1ODM5OS4xLjAuMTY2ODM1ODQwMi4wLjAuMA

⁴ <https://atlantic.ctvnews.ca/new-brunswick-announces-five-year-tourism-strategy-to-boost-industry-1.5847844>

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

New Brunswick's tourism sector employed an average of 29,528 employees through the first nine months of 2022, of whom 52% were employed in food and beverage services and 22% in recreation and entertainment.

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

Industry	New Brunswick	
	#	%
Accommodation	4,722	16%
Food and beverage services	15,389	52%
Recreation and entertainment	6,417	22%
Transportation	2,611	9%
Travel services	389	1%
Tourism Sector Total	29,528	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 31,861 through the first nine months of 2022. Unemployment averaged 7.3%.

Figure 1: Total Labour Force and Unemployment Rate, New Brunswick 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 New Brunswick tourism sector accounts for approximately 8% of the total employment in New Brunswick, less than the national tourism industry average of 9.5%.

Table 2: New Brunswick Tourism Sector vs Total Employment, 2022

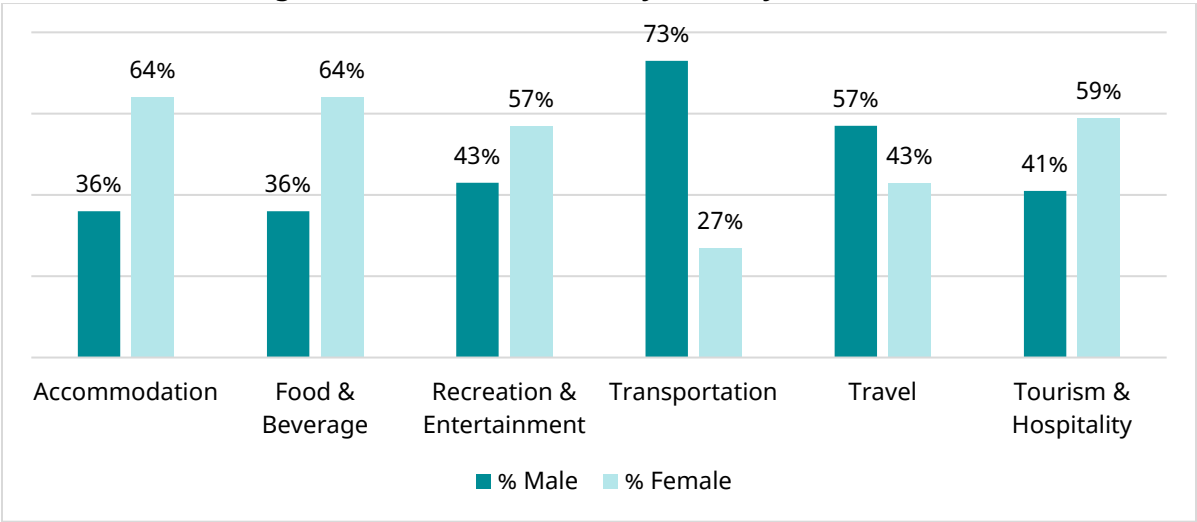
Employment	New Brunswick	Canada
Tourism	29,528	1,859,806
Overall Employment	367,778	19,523,917
Percent Tourism of Overall Employment	8.0%	9.5%

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

DEMOGRAPHIC CHARACTERISTICS

The workforce had a higher proportion of female (59%) than males (41%) in 2022. The transportation industry has the highest concentration of male workers (73%) while the food and beverage services and accommodation sectors have the highest concentration of female workers (64%).

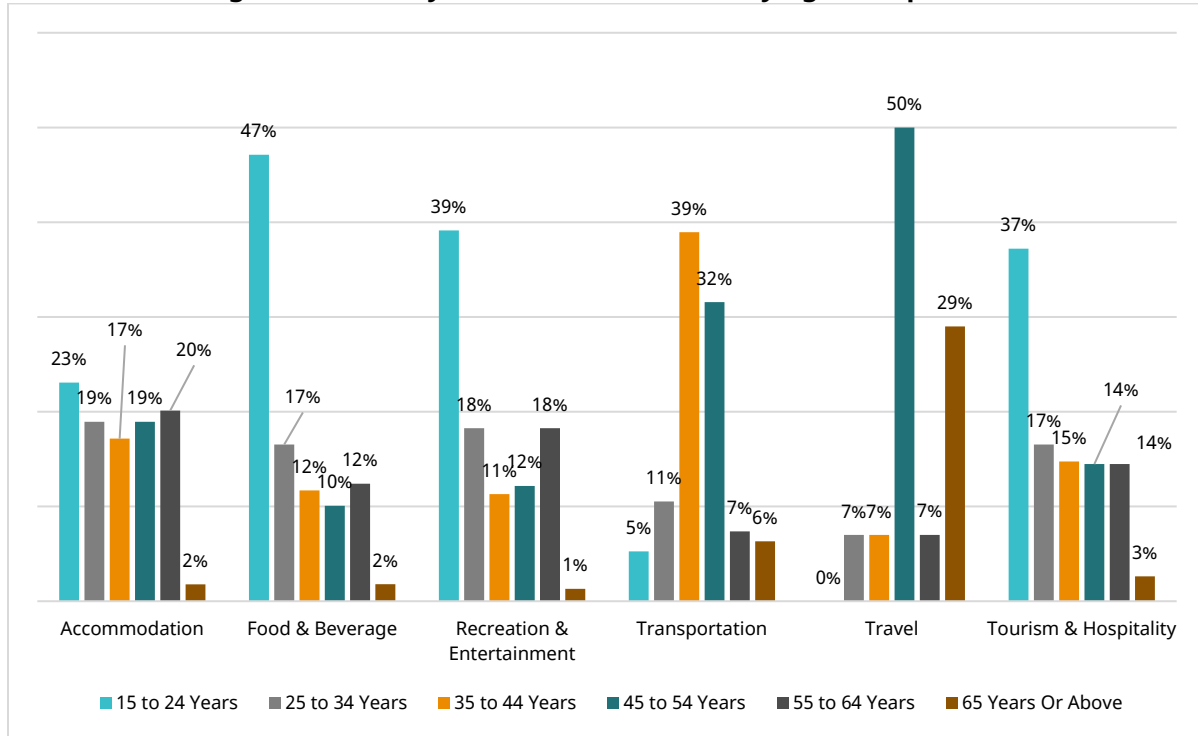
Figure 2: Workforce Gender by Industry and Sector, 2022



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

The food and beverage services industry has the youngest workforce with 47% of its workers being between 15 and 24 years of age, while the travel services industry is the oldest with 29% of its workers being 55 years or older. 54% of the workforce is under the age of 35.

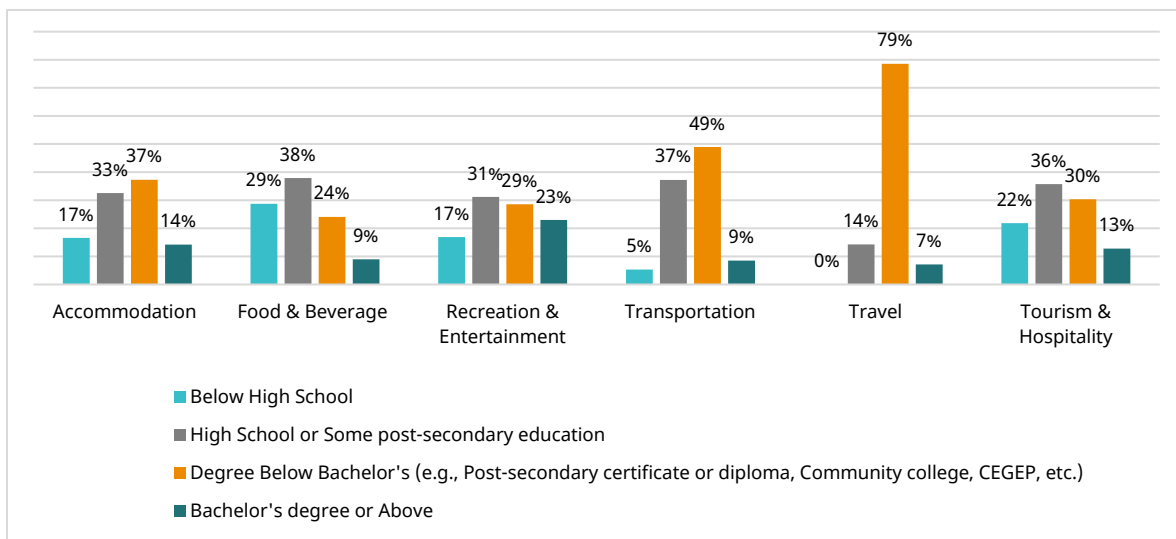
Figure 3: Industry and Sector Workforce by Age Groups, 2022



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

A total of 43% 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 less than a bachelor's degree (reflecting the high percentage of workers who are 24 or less).

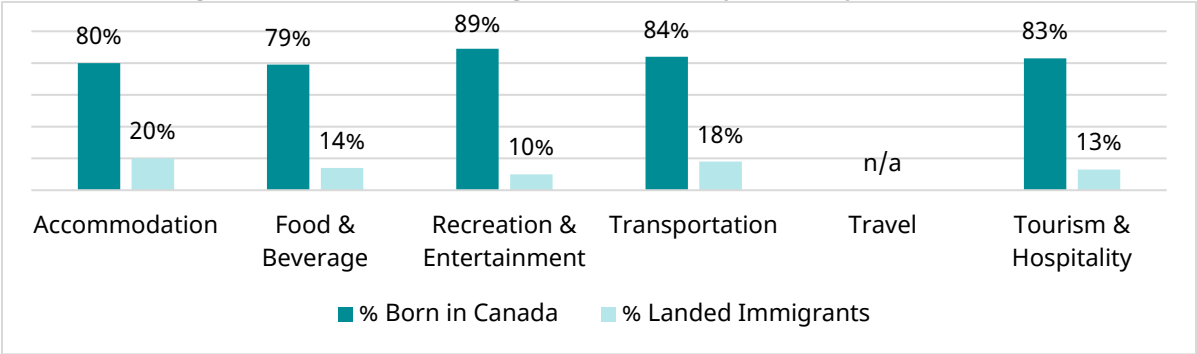
Figure 4: Workforce Education Level by Industry and Sector, 2022



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

In 2022, 83% of the tourism sector workforce were born in Canada, whereas 13% are landed immigrants. The majority of the workforce who were born in Canada work in recreation and entertainment industry while the majority of landed immigrants work in the accommodation industry.

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

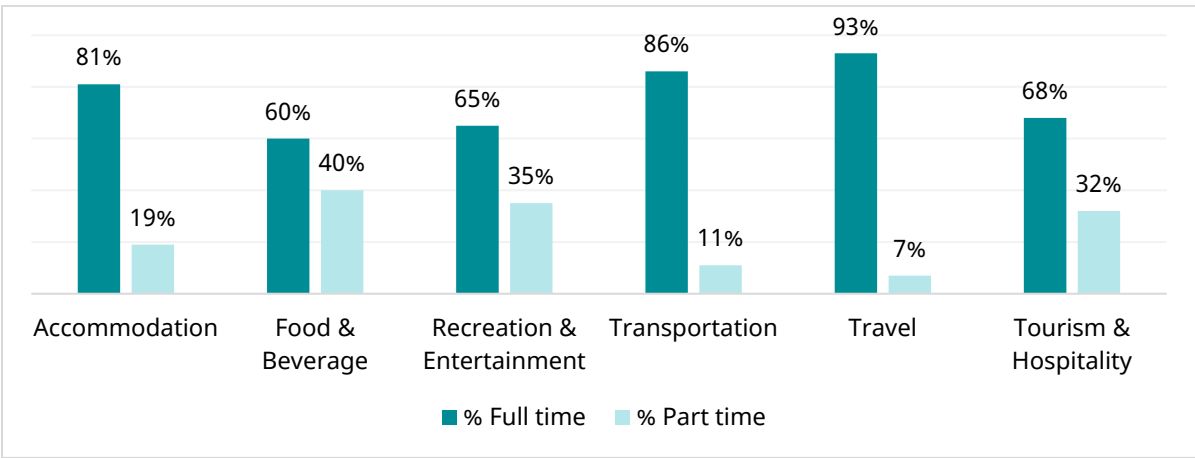


Source: THRC Employment Tracker, LFS Statistics Canada.

EMPLOYMENT STATUS AND WAGES

Approximately 68% of the provincial workforce is employed on a full-time basis and 32% is employed part-time. The travel services industry has the highest percentage of full-time workers (93%) while the food and beverage services industry have the highest percentage of part-time workers (40%).

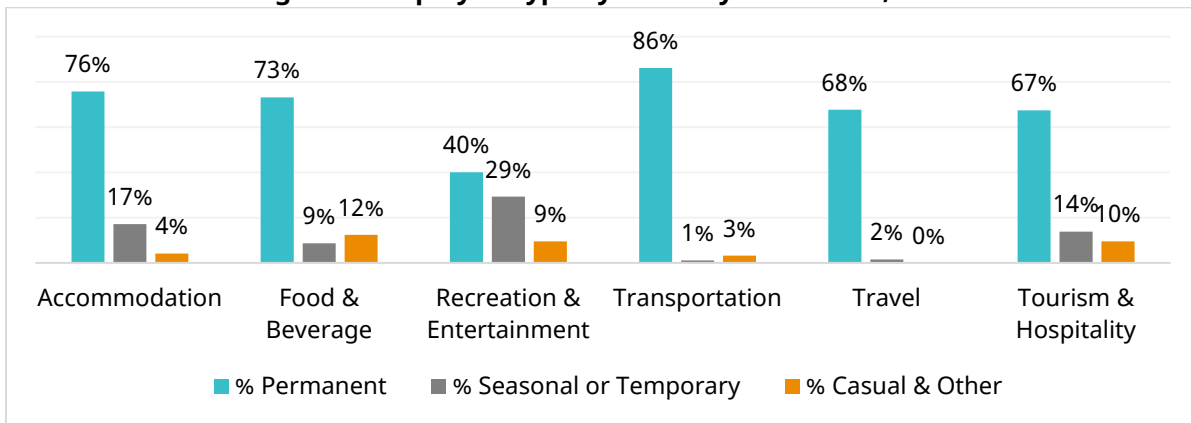
Figure 6: Job Status by Industry and Sector, 2022



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

Permanent workers account for 67% of the workforce, while 24% 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 (86%), whereas the recreation and entertainment industry have the highest percentage of seasonal employees (29%).

Figure 7: Employee Type by Industry and Sector, 2022

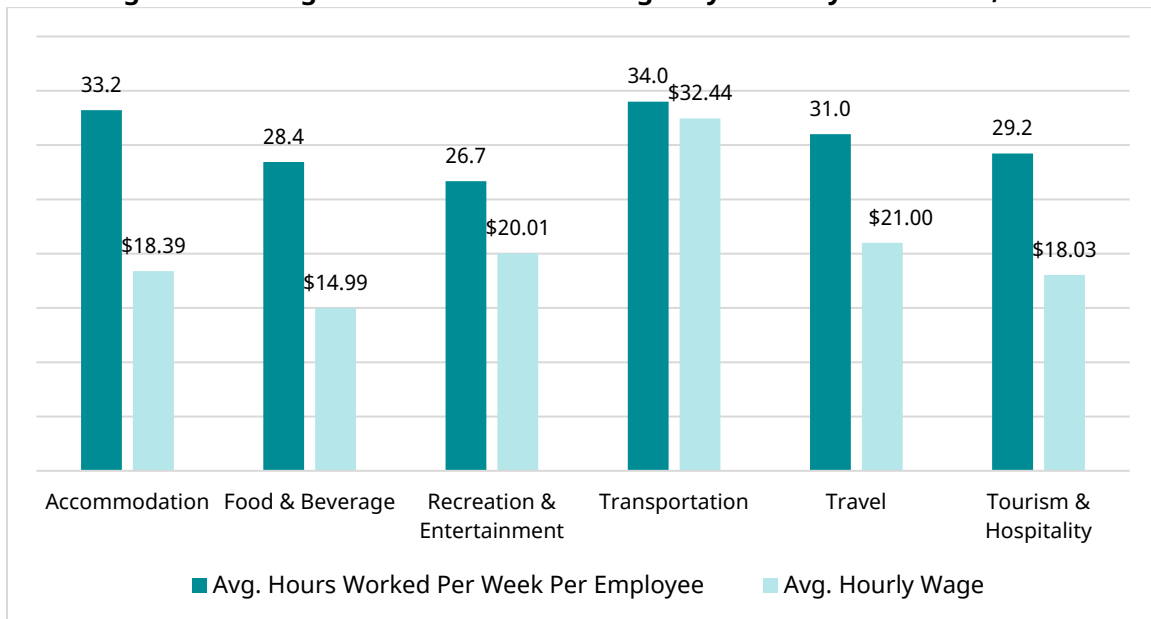


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

*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 \$18.03 per hour and the average hours worked per week is 29. Employees in the transportation industry work the most hours per week (of 34 hours per employee) and are paid the highest average hourly wage (\$32.44 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 New Brunswick's tourism sector workforce have been employed in their current positions for seven years. In terms of sectors, the travel services industry has the longest average length of employment of 11.2 years, while the food and beverage services industry had the shortest average length of employment of 5.5 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	1,222	26%	3,056	20%	1,667	26%	167	6%	28	7%	6,139	20%
1 to 2	500	11%	4,056	26%	1,444	23%	417	16%	28	7%	6,444	22%
2 to 4	778	17%	4,028	26%	1,139	18%	306	12%	56	14%	6,306	21%
5 to 7	500	11%	1,556	10%	583	9%	444	17%	0	0%	3,083	11%
8 to 10	361	8%	833	5%	250	4%	667	25%	139	36%	2,278	7%
11 to 15	528	11%	722	5%	333	5%	56	2%	0	0%	1,639	6%
16 to 20	361	8%	444	3%	194	3%	139	5%	0	0%	1,111	4%
Over 20	444	9%	694	4%	778	12%	444	17%	139	36%	2,500	9%
Total	4,722	100%	15,389	100%	6,417	100%	2,611	100%	389	100%	29,528	100%
<i>Avg. Length</i>	<i>8.0 years</i>		<i>5.5 years</i>		<i>7.4 years</i>		<i>10.5 years</i>		<i>11.2 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 transportation and accommodation industries account for the occupations that have the highest average experience levels.

Table 4: Leading Occupations in New Brunswick'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	5,722	\$13.60	3.8
6322	Cooks	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	2,500	\$15.00	7.3
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	2,028	\$19.90	10.6
6611	Cashiers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	1,750	\$13.70	3.1
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	1,444	\$15.00	5.4
6513	Food and beverage servers	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	1,444	\$15.50	5.6
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	1,444	\$14.10	2.9
6731	Light duty cleaners	<ul style="list-style-type: none"> On-the-job training Certification for housekeeping room attendants or similar certification 	Accommodation	1,000	\$14.90	5.8
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	972	\$17.40	7.8

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> On the job training 	Food & Beverage services	833	\$16.60	9.0
6722	Operators and attendants in amusement, recreation, and sport	<ul style="list-style-type: none"> On-the-job training 	Recreation & Entertainment	639	\$16.80	5.4
6523	Airline ticket and service agents	<ul style="list-style-type: none"> Several weeks of on-the-job and classroom training Airline station agents usually require experience as a ticket, baggage, or cargo agent. Load planners require a restricted radio operator's licence and usually require airline operations experience. 	Transportation	444	\$24.00	15.6
6512	Bartenders	<ul style="list-style-type: none"> Responsible beverage service certification On-the-job training 	Food & Beverage services	417	\$15.70	4.2
6313	Accommodation, travel, tourism, and related services supervisors	<ul style="list-style-type: none"> Related post-secondary degree or diploma Extensive practical experience and training 	Accommodation	361	\$24.00	9.1
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	333	\$18.60	3.4
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. 	Accommodation	278	\$19.30	12.5
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	222	-	8.9
6733	Janitors, caretakers and building superintendents	<ul style="list-style-type: none"> Some occupations in this unit group require previous cleaning and maintenance experience. 	Accommodation	222	\$19.00	10.1

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
		<ul style="list-style-type: none"> A journeyman/woman certificate in one or more of the trades or a building operator certificate may be required for building superintendents. 				
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 may be required. 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. Structured training is provided by employers. <p>Flight instructors</p> <ul style="list-style-type: none"> A university degree or college diploma may be required. 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	222	\$64.00	7.2
6532	Outdoor sport and recreational guides	<ul style="list-style-type: none"> Knowledge of a particular terrain or body of water demonstrated ability in the guided activity and relevant licences and certifications are required Hot air balloon pilots require completion of 10 hours of ground school, 16 hours of pilot-in-command experience and a Balloon Pilot Licence issued by Transport Canada. Additional hours of pilot-in-command experience may be required by some employers. Certification in first aid and cardiopulmonary resuscitation (CPR) may be required. 	Recreation & Entertainment	222	\$16.60	8.8

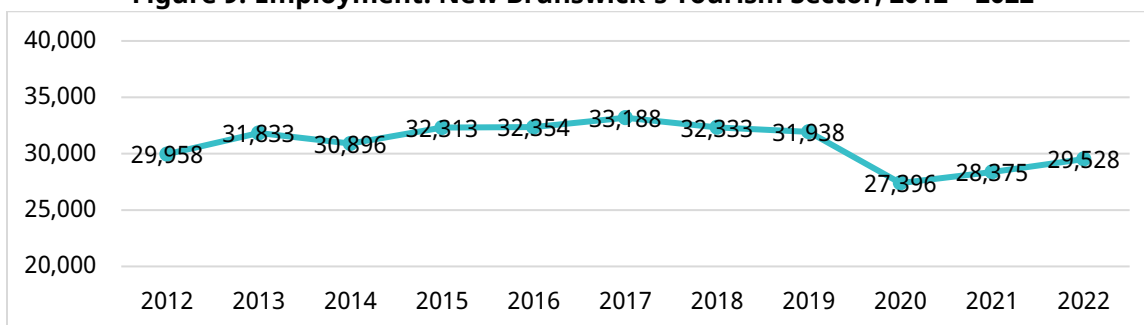
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

2. IMPACT OF THE PANDEMIC

CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 0.9% from 2012 to 2019, rising from an average of 29,958 employees per month in 2012 to 31,938 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (29,528 employees per month) remain below pre-pandemic levels.

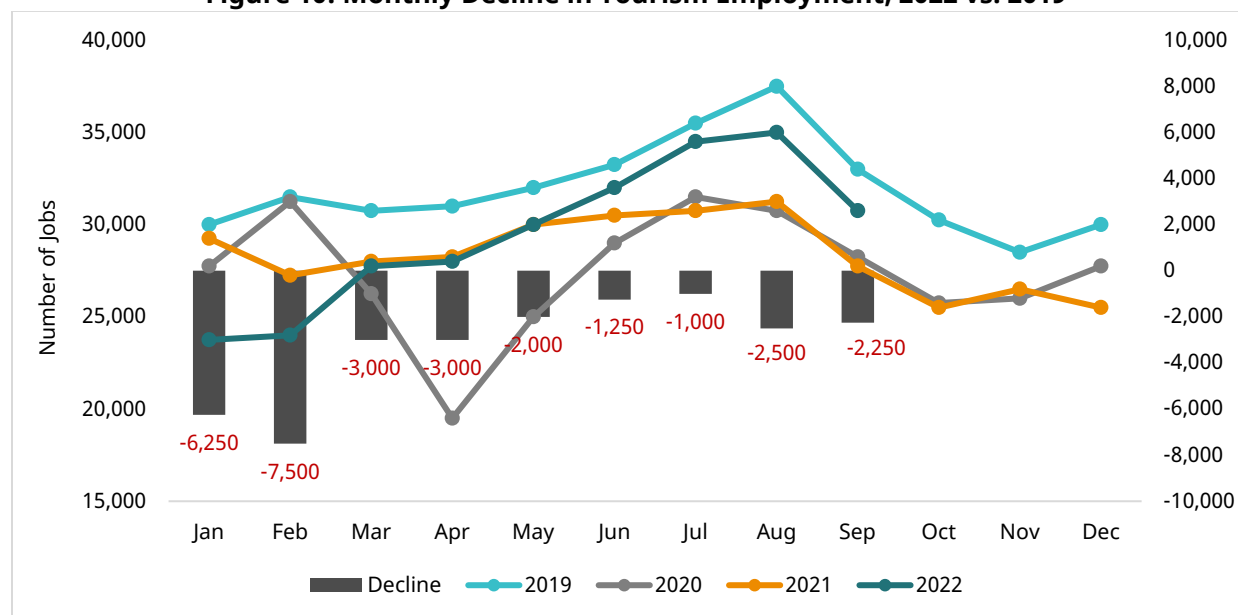
Figure 9: Employment: New Brunswick's Tourism Sector, 2012 – 2022



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

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

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



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

The impact of the pandemic on employment varies by industry. While overall employment in the tourism sector is down 8% in 2022 relative to 2019, the percentage varies from growth of 44% in the travel services to losses of 36% in the transportation 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	4,667	3,167	2,938	4,722	-32%	-37%	1%
Food and Beverage services	16,771	16,188	17,292	15,389	-3%	3%	-8%
Recreation and Entertainment	6,167	4,896	5,083	6,417	-21%	-18%	4%
Transportation	4,063	2,542	2,604	2,611	-37%	-36%	-36%
Travel services	271	604	458	389	123%	69%	44%
Total	31,938	27,396	28,375	29,528	-14%	-11%	-8%

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. Seasonal and casual workers, women, and the oldest workers (those 65 and above, many of whom stayed home because of health concerns) 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. Since 2020, the impact has become more balanced. However, employment levels of those 65 and above remain well below 2019 levels.

Table 6: Employment by Demographics, 2019-2022

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Job Status							
Full-time	21,583 (68%)	18,417 (67%)	17,521 (62%)	19,917 (68%)	-15%	-19%	-8%
Part-time	10,375 (33%)	9,000 (33%)	10,854 (38%)	9,583 (32%)	-13%	5%	-8%
Permanent							
Permanent	23,521 (74%)	20,042 (73%)	20,625 (73%)	19,889 (67%)	-15%	-12%	-15%
Seasonal	2,688 (8%)	1,750 (6%)	2,146 (8%)	3,083 (10%)	-35%	-20%	15%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Casual	1,938 (6%)	1,208 (4%)	1,479 (5%)	2,306 (8%)	-38%	-24%	19%
Temporary	1,104 (3%)	1,021 (4%)	854 (3%)	1,000 (3%)	-8%	-23%	-9%
Gender							
Male	14,208 (44%)	12,708 (46%)	13,542 (48%)	12,111 (41%)	-11%	-5%	-15%
Female	17,729 (56%)	14,688 (54%)	14,813 (52%)	17,389 (59%)	-17%	-16%	-2%
Age Group							
15 to 24	11,063 (35%)	9,229 (34%)	10,583 (37%)	11,000 (37%)	-17%	-4%	-1%
25 to 34	5,333 (17%)	5,354 (20%)	4,313 (15%)	4,889 (17%)	0%	-19%	-8%
35 to 44	4,875 (15%)	4,375 (16%)	3,771 (13%)	4,361 (15%)	-10%	-23%	-11%
45 to 54	4,750 (15%)	3,708 (14%)	4,833 (17%)	4,278 (14%)	-22%	2%	-10%
55 to 64	4,146 (13%)	3,458 (13%)	3,583 (13%)	4,278 (14%)	-17%	-14%	3%
65 or above	1,750 (5%)	1,250 (5%)	1,292 (5%)	778 (3%)	-29%	-26%	-56%
Education							
Below high school	6,542 (21%)	5,500 (20%)	5,917 (21%)	6,444 (22%)	-16%	-10%	-1%
High school or some post-secondary	12,333 (39%)	10,333 (38%)	11,229 (40%)	10,556 (36%)	-16%	-9%	-14%
Degree below bachelor's	8,229 (26%)	7,563 (28%)	7,771 (27%)	8,944 (30%)	-8%	-6%	9%
Bachelor's degree or above	5,083 (16%)	4,208 (15%)	3,542 (12%)	3,778 (13%)	-17%	-30%	-26%

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 sector. The loss of experienced workers is evident in the decline in workers with 11 to 15 years of experience. There was also a year-over-year reduction in employees with less than one year experience because fewer new workers entered the sector.

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	7,313	4,083	6,479	6,139	-44%	-11%	-16%
1 year	7,083	6,958	5,271	6,444	-2%	-26%	-9%
2 to 4 years	6,917	7,771	7,479	6,306	12%	8%	-9%
5 to 7 years	3,104	2,479	2,458	3,083	-20%	-21%	-1%
8 to 10 years	1,979	1,521	1,104	2,278	-23%	-44%	15%
11 to 15 years	1,833	1,750	1,417	1,639	-5%	-23%	-11%
16 to 20 years	1,167	1,042	1,396	1,111	-11%	20%	-5%
Over 20 years	2,667	1,875	2,833	2,500	-30%	6%	-6%
Total	31,938	27,396	28,375	29,528	-14%	-11%	-8%
Avg. years	6.6	6.5	7.3	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 9% in 2020. In 2022, the average hours worked are almost back to 2019 levels. All sectors, with the exception of food and beverage services, have experienced an increase in average hours per week relative to 2019 which also reflect difficulties in filling positions (i.e., existing workers are asked to work more hours).

Table 8: NB 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	32.5	28.2	31.2	33.2	-13%	-4%	2%
Food and Beverage services	27.3	25.5	27.7	28.4	-7%	1%	4%
Recreation and Entertainment	29.3	26.7	27.4	26.7	-9%	-6%	-9%
Transportation	33.8	28.9	31.0	34.0	-14%	-8%	1%
Travel services	28.0	28.0	23.0	31.0	0%	-18%	11%
Tourism New Brunswick	29.3	26.6	28.2	29.2	-9%	-4%	-0.3%

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

Overall, the average hourly wage in New Brunswick's tourism sector has increased since 2019. The average hourly wage increased from \$16.35 in 2019 to \$18.03 in 2022.

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

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	\$16.26	\$17.14	\$16.73	\$18.39	5%	3%	13%
Food and Beverage services	\$13.45	\$13.74	\$14.18	\$14.99	2%	5%	11%
Recreation and Entertainment	\$18.18	\$20.39	\$19.58	\$20.01	12%	8%	10%
Transportation	\$25.42	\$22.54	\$29.92	\$32.44	-11%	18%	28%
Travel services	\$22.00	\$24.00	\$17.30	\$21.00	9%	-21%	-5%
Tourism New Brunswick	\$16.35	\$16.30	\$16.80	\$18.03	-0.3%	3%	10%

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

The increase in wages is attributable to three factors:

- An increase in average wage per position (including entry level positions);
- Changes in the average level of experience within positions (e.g., more experienced workers tend to receive higher wages); and
- 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.

CHANGES IN EMPLOYMENT BY OCCUPATIONAL GROUP

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

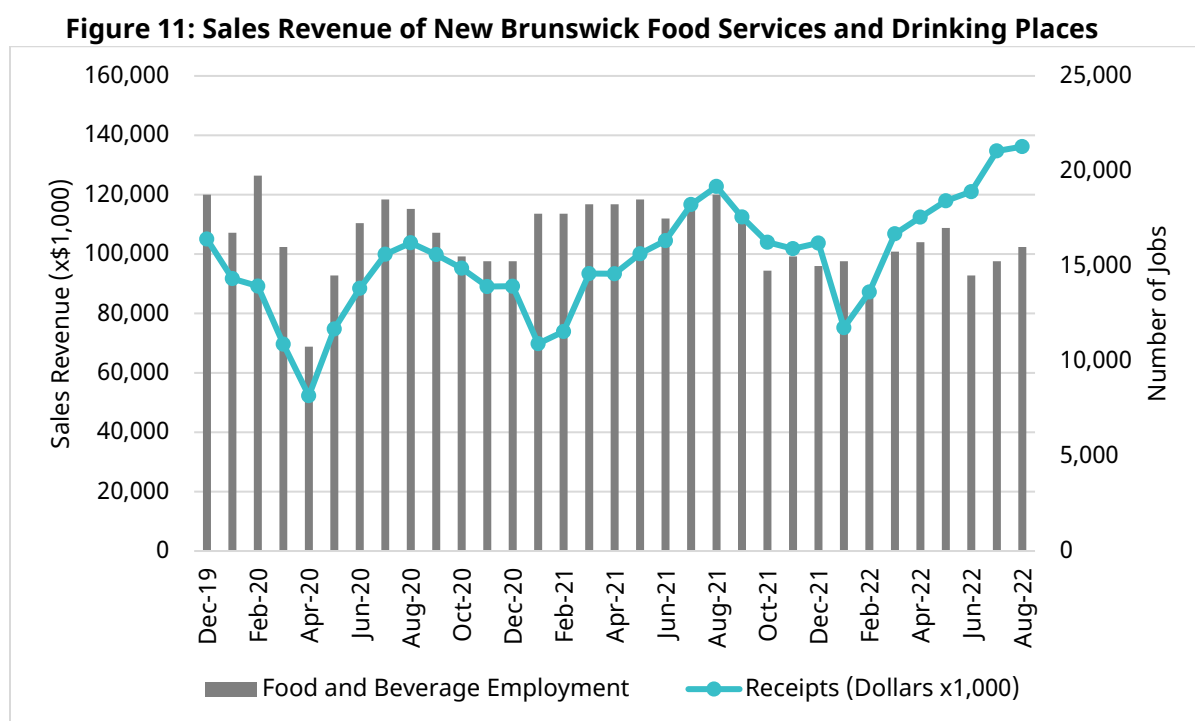
Table 10: Employment of Leading Occupations in New Brunswick's Tourism Sector (2019-2022)

NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	4,729	5,500	5,521	5,722	16%	17%	21%
6322	Cooks	4,542	3,188	2,500	2,500	-30%	-45%	-45%
0631	Restaurant and food service managers	1,563	1,938	2,063	2,028	24%	32%	30%
6611	Cashiers	1,708	1,271	1,938	1,750	-26%	13%	2%
6311	Food service supervisors	1,188	1,292	2,229	1,444	9%	88%	22%
6513	Food and beverage servers	2,438	1,500	1,792	1,444	-38%	-26%	-41%
5254	Program leaders and instructors in recreation, sport, and fitness	1,208	438	854	1,444	-64%	-29%	20%
6731	Light duty cleaners	958	563	646	1,000	-41%	-33%	4%
6525	Hotel front desk clerks	833	458	292	972	-45%	-65%	17%
6511	Maîtres d'hôtel and hosts/hostesses	792	750	1,167	833	-5%	47%	5%
6722	Operators and attendants in amusement, recreation, and sport	583	500	833	639	-14%	43%	10%
6523	Airline ticket and service agents	500	313	146	444	-38%	-71%	-11%
6512	Bartenders	208	313	438	417	50%	110%	100%
6313	Accommodation, travel, tourism, and related services supervisors	271	375	146	361	38%	-46%	33%
6321	Chefs	313	229	250	333	-27%	-20%	7%
8612	Landscaping and grounds maintenance labourers	563	250	63	278	-56%	-89%	-51%
7513	Taxi and limousine drivers and chauffeurs	396	146	271	222	-63%	-32%	-44%
6733	Janitors, caretakers and building superintendents	417	333	271	222	-20%	-35%	-47%
2271	Air pilots, flight engineers and flying instructors	271	146	208	222	-46%	-23%	-18%

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 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.



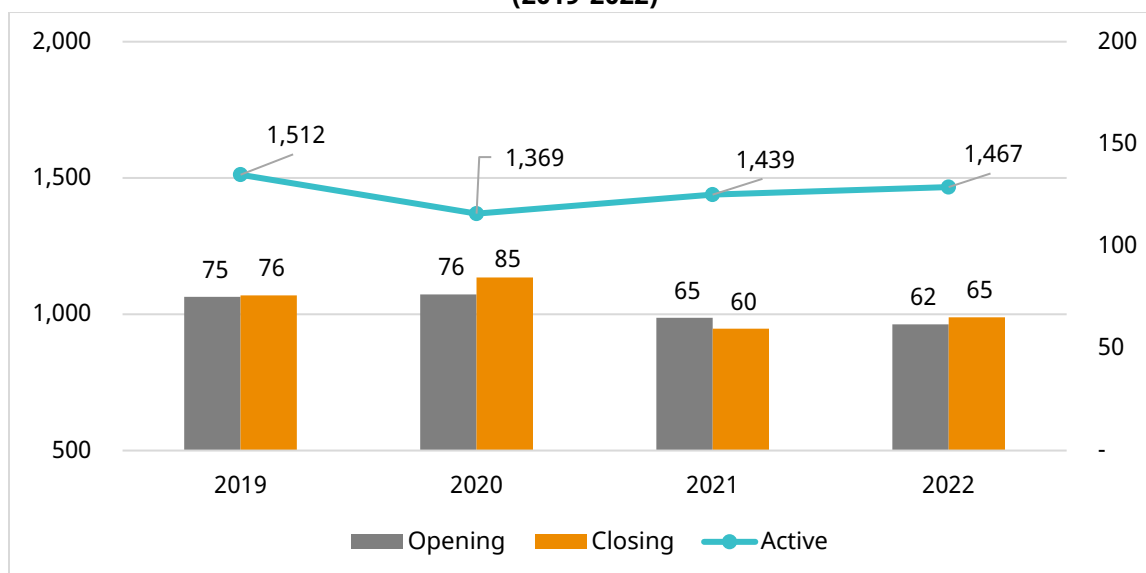
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000)

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.

Figure 12: Avg Monthly Business Opening and Closures, New Brunswick'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.

⁵ Pulse of the American Worker Survey: A Third Year Begins — Life and Work in the Pandemic Era.

Table 11: Year to Year Change in Employment by Industry and Sector, New Brunswick (2019-2022)

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	4,667	3,167	2,938	4,722	-1,500	-229	1,784
Food and Beverage services	16,771	16,188	17,292	15,389	-583	1,104	-1,903
Recreation and Entertainment	6,167	4,896	5,083	6,417	-1,271	187	1,334
Transportation	4,063	2,542	2,604	2,611	-1,521	62	7
Travel services	271	604	458	389	333	-146	-69
Sector Totals	31,938	27,396	28,375	29,528	-4,542	979	1,153
Accommodation and food services (non-tourism)	458	500	729	917	42	229	188
Administrative and support, waste management and remediation services	16,042	14,583	14,583	13,389	-1,458	-	-1,194
Agriculture, forestry, fishing and hunting	11,813	12,042	11,271	11,083	229	-771	-188
Arts, entertainment and recreation (non-tourism)	229	104	63	167	-125	-42	104
Construction	25,042	24,208	23,563	28,278	-833	-646	4,715
Educational services	27,521	26,854	28,667	31,889	-667	1,813	3,222
Finance and insurance	12,063	12,458	13,125	13,083	396	667	-42
Health care and social assistance	61,063	59,292	59,458	57,972	-1,771	167	-1,486
Information and cultural industries	6,667	5,167	4,646	3,972	-1,500	-521	-674
Manufacturing	31,417	29,479	28,938	29,083	-1,938	-542	146
Mining, quarrying, and oil and gas extraction	4,250	2,708	2,938	3,333	-1,542	229	396
Other services (except public administration)	13,979	13,729	14,771	13,361	-250	1,042	-1,410
Professional, scientific and technical services	17,229	17,521	17,938	21,472	292	417	3,535
Public administration	26,146	27,917	30,688	31,917	1,771	2,771	1,229
Real estate and rental and leasing	4,104	3,271	3,979	2,917	-833	708	-1,063
Retail trade	43,104	45,396	46,333	46,472	2,292	938	139

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Transportation and warehousing (non-tourism)	15,417	15,542	16,625	15,806	125	1,083	-819
Utilities	3,646	3,667	3,917	4,667	21	250	750
Wholesale trade	8,979	9,708	9,854	8,500	729	146	-1,354
Total New Brunswick Employment	361,125	351,604	360,500	367,750	-9,521	8,896	7,250

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

3. LABOUR MARKET OUTLOOK

PROJECTED EMPLOYMENT

Tourism HR Canada engaged the Conference Board of Canada to develop employment projections for the tourism sector. The results were published in July 2022. The following table summarizes their projections regarding employment in the New Brunswick's tourism sector by 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%. The leading industry in terms of growth is expected to be accommodation (11.6%).

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

New Brunswick	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
Tourism Sector Totals	28,375	33,251	34,884	35,477	35,836	26.3%
<i>Year-over-year Growth</i>	-	17.2%	4.9%	1.7%	1.0%	6.0%
Industry						
Accommodation	2,938	4,164	4,452	4,507	4,554	55.0%
<i>year-over-year growth</i>	-	41.7%	6.9%	1.2%	1.0%	11.6%
Food and Beverage services	17,292	20,215	20,951	21,137	21,345	23.4%
<i>year-over-year growth</i>	-	16.9%	3.6%	0.9%	1.0%	5.4%
Recreation and Entertainment	5,083	5,608	5,992	6,108	6,216	22.3%
<i>year-over-year growth</i>	-	10.3%	6.9%	1.9%	1.8%	5.2%
Transportation	2,604	2,940	3,087	3,225	3,221	23.7%
<i>year-over-year growth</i>	-	12.9%	5.0%	4.5%	-0.1%	5.5%
Travel services	458	479	529	557	575	25.5%
<i>year-over-year growth</i>	-	4.6%	10.4%	5.4%	3.1%	5.8%

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

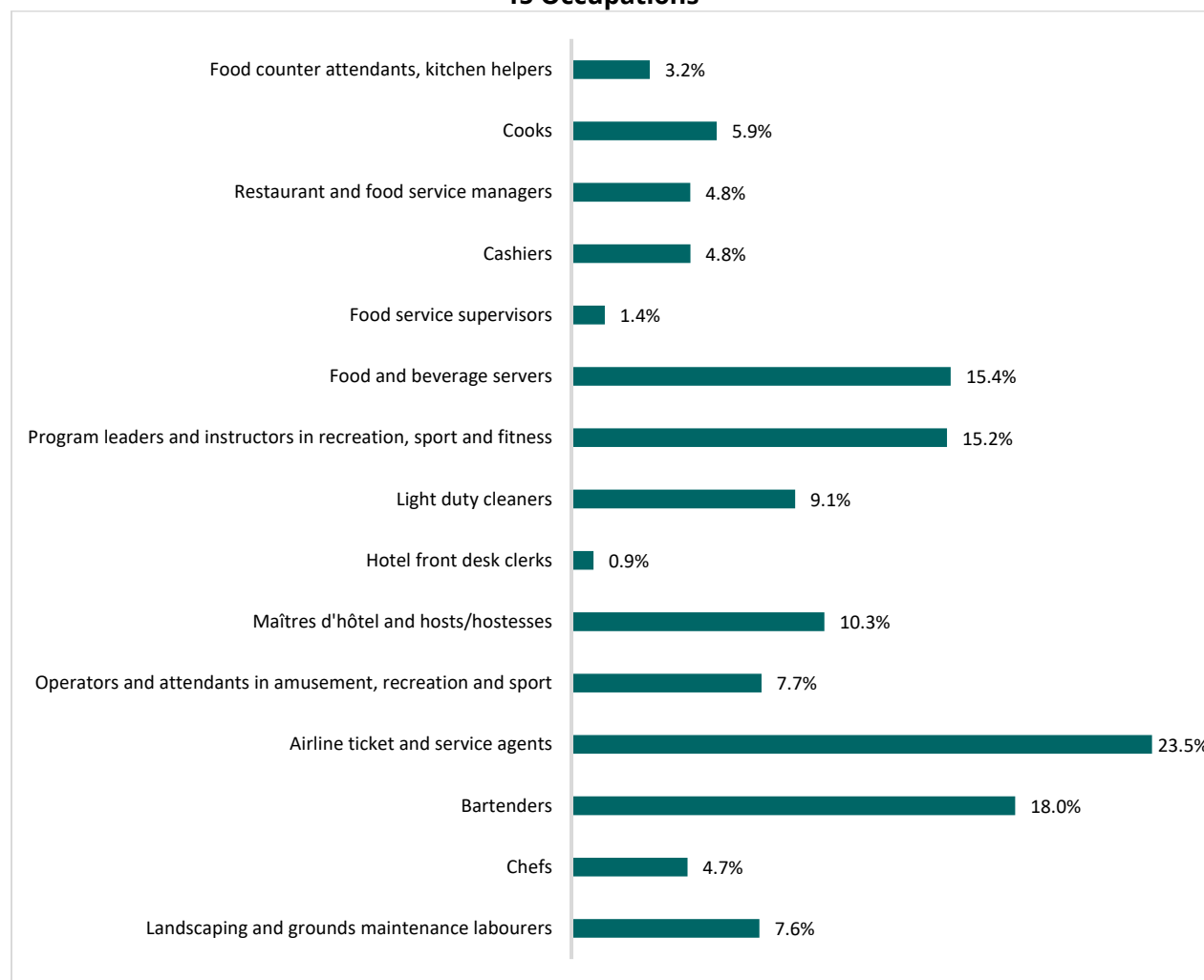
Across Canada, the Conference Board projected compounded annual employment growth in the tourism sector of 6.4% of the 4-year growth period from 2021 to 2025. This growth is consistent with the results of a recent survey conducted for Tourism HR Canada.⁶ Of the 700 tourism employers surveyed, 29% are 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 New Brunswick's tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be airline ticket and service agents and bartenders.

Figure 13: New Brunswick 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>

