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# SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

**QATALYST**  
RESEARCH GROUP

**Provincial Report Series: Newfoundland and  
Labrador**



**Prepared for:**

Tourism HR Canada

**Prepared by:**

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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.

For more information, email [research@tourismhr.ca](mailto:research@tourismhr.ca) or visit [tourismhr.ca](https://tourismhr.ca).

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

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

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# INTRODUCTION

## BACKGROUND

Prior to the COVID-19 pandemic, tourism was a significant and growing source of 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 Newfoundland and Labrador, 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 Newfoundland and Labrador'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 Newfoundland and Labrador's tourism sector by sector and leading occupations.

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

## OVERVIEW OF THE NEWFOUNDLAND AND LABRADOR TOURISM SECTOR

Newfoundland and Labrador's tourism sector is comprised of companies which provide accommodation, food and beverage services, recreation and entertainment, transportation and travel services. There are more than 2,700 tourism businesses in Newfoundland and Labrador.<sup>1</sup> Top tourist attractions in the province include Gros Morne National Park, St. John's, Terra Nova National Park, Torngat Mountains National Park, L'Anse aux Meadows National Historic Site and Fogo and Change Islands.<sup>2</sup> There are currently more than 20,000 Newfoundlanders and Labradorians employed by the tourism sector from gas station attendants to ferry workers and musicians to shop keepers and chefs. The tourism sector contributes \$1.4 annually to the local economy with significant growth opportunities in the future.<sup>3</sup>

Although the tourism sector was affected by the COVID-19 pandemic, it continues to improve and is one of the fastest growing industries in the province. According to the Department of tourism, culture, arts and recreation, visitation to NL increased 256% in the month of December 2021 as compared to December 2020, marking significant year-over-year growth.<sup>4</sup> To support tourism businesses recovering from the COVID-19 pandemic, the Minister of Official Languages and Minister responsible for Atlantic Canada Opportunities Agency (ACOA), announced a \$325,000 contribution from ACOA's Business Development Program (BDP) for Hospitality Newfoundland and Labrador.<sup>5</sup>

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<sup>1</sup> <https://hnl.ca/wearetourism/>

<sup>2</sup> <https://www.newfoundlandlabrador.com/>

<sup>3</sup> <https://hnl.ca/wearetourism/>

<sup>4</sup> [https://www.gov.nl.ca/tcar/files/Monthly-Performance-Report\\_YEAR-END-2021\\_FINAL-14Apr2022.pdf](https://www.gov.nl.ca/tcar/files/Monthly-Performance-Report_YEAR-END-2021_FINAL-14Apr2022.pdf)

<sup>5</sup> <https://www.canada.ca/en/atlantic-canada-opportunities/news/2022/05/newfoundland-and-labradors-tourism-sector-will-benefit-from-strengthened-tools-and-supports.html>

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

Newfoundland and Labrador's tourism sector employed an average 23,306 employees through the first nine months of 2022, of whom 48% were employed in food and beverage services, 21% in recreation and entertainment, 19% in transportation, 11% in accommodation and 1% in the travel services industry.

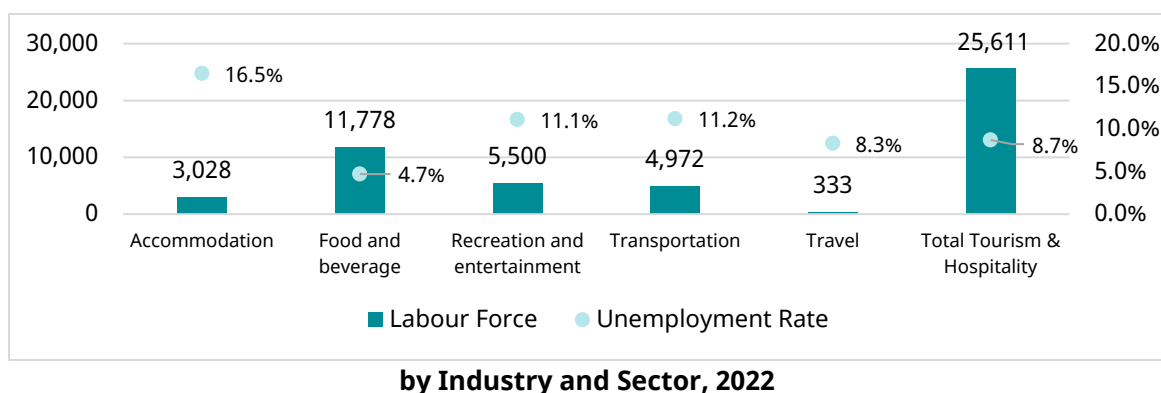
**Table 1: Employment in the Newfoundland and Labrador's Tourism Industry and Sector, 2022**

Industry	Newfoundland and Labrador	
	#	%
Accommodation	2,500	11%
Food and beverage services	11,222	48%
Recreation and entertainment	4,917	21%
Transportation	4,361	19%
Travel services	306	1%
<b>Tourism Sector Total</b>	<b>23,306</b>	<b>100%</b>

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 25,611 through the first nine months of 2022. Unemployment averaged 8.7%.

**Figure 1: Total Labour Force and Unemployment Rate, Newfoundland and Labrador Tourism**



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 Newfoundland and Labrador’s tourism sector accounts for 10.3% of the total employment in Newfoundland and Labrador, slightly higher than the national average of 9.5%.

**Table 2: Newfoundland and Labrador Tourism Sector vs Total Employment, 2022**

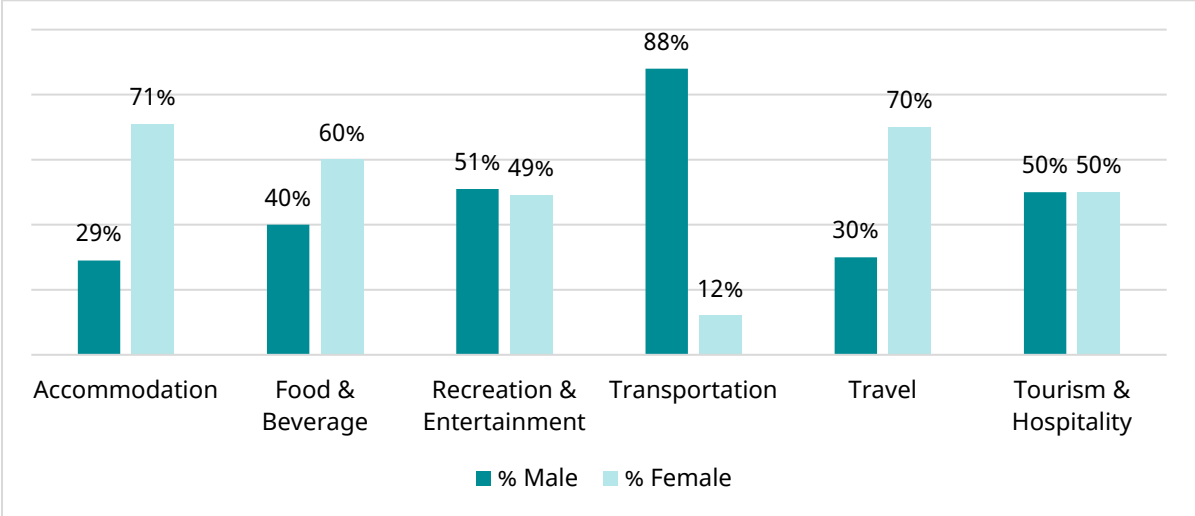
Employment	Newfoundland and Labrador	Canada
Tourism	23,306	1,859,806
Overall Employment	227,444	19,523,917
Percent Tourism of Overall Employment	10.3%	9.5%

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

## DEMOGRAPHIC CHARACTERISTICS

The workforce is evenly divided in terms of gender. The transportation industry has the highest concentration of male workers (88%) while the accommodation industry has the highest concentration of female workers (71%).

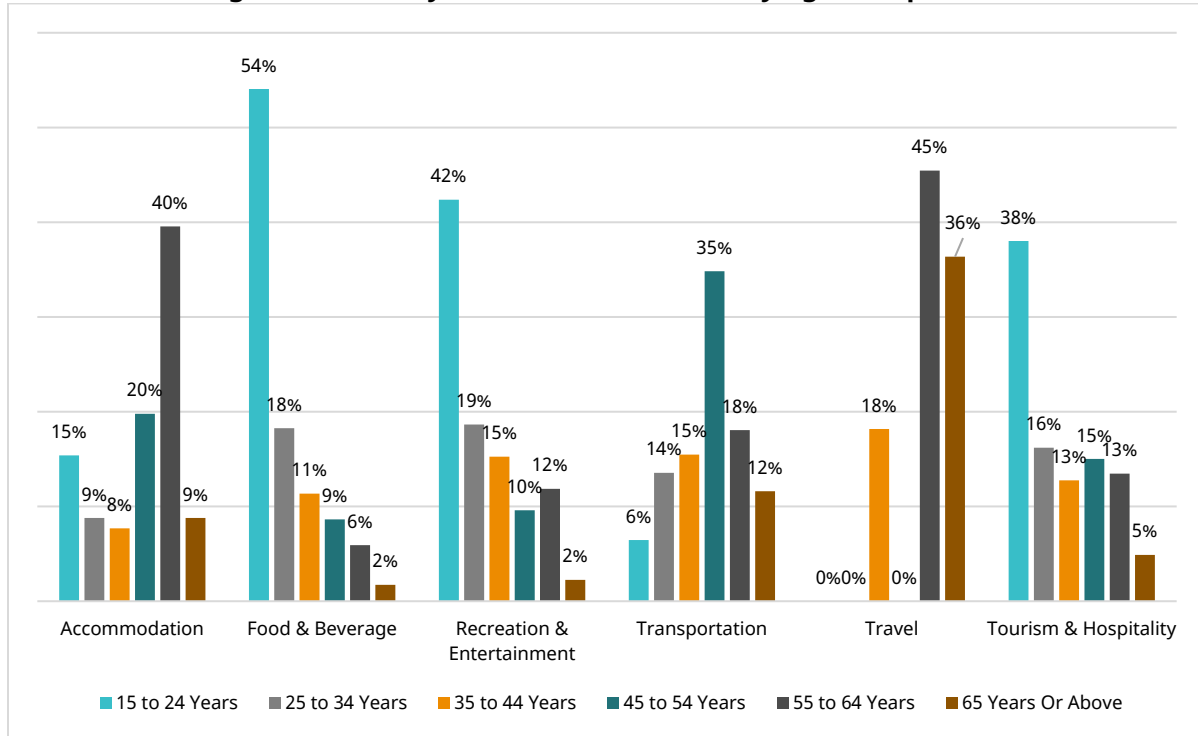
**Figure 2: Workforce Gender by Industry and Sector, 2022**



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

The food and beverage services industry has the youngest workforce with 54% of its workers being between 15 and 24 years of age, while the transportation industry has the oldest workforce with 12% of its workers being 65 years or older. A little over half (54%) of the workforce is under the age of 35.

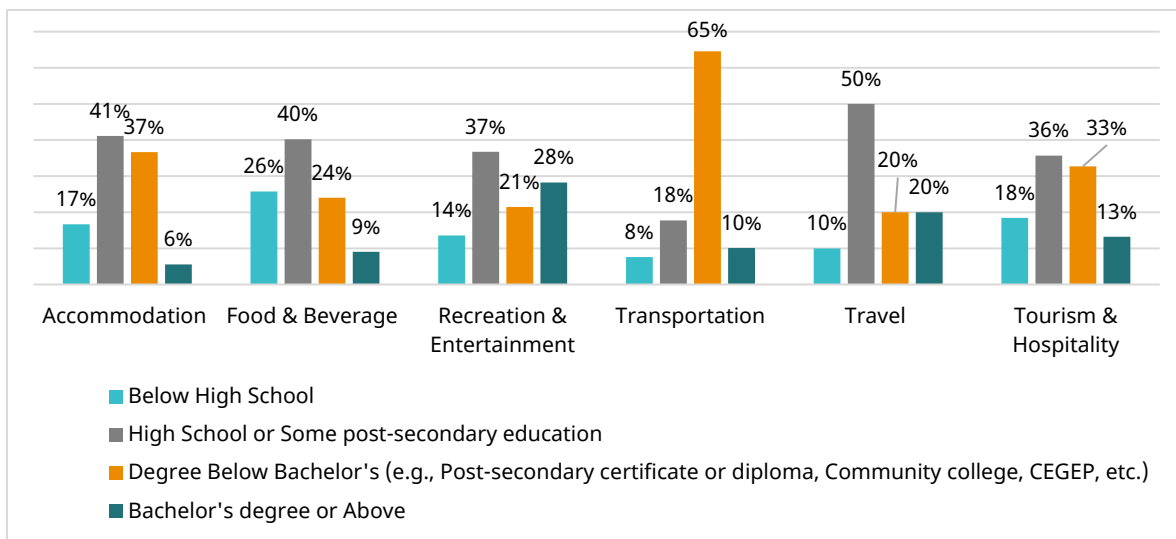
**Figure 3: Industry and Sector Workforce by Age Groups, 2022**



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

Approximately half (46%) have a post-secondary degree or higher. The transportation industry has the highest percentage of workers with a post-secondary education or higher while the food and beverage services sector has the highest percentage of workers with less than a bachelor's degree (reflecting the high percentage of workers who are 24 or less).

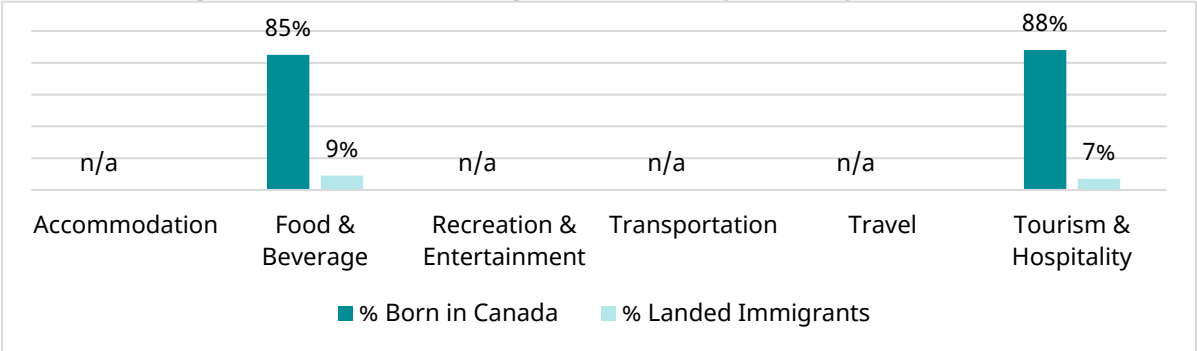
**Figure 4: Workforce Education Level by Industry and Sector, 2022**



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

In 2022, 88% of the tourism sector workforce were born in Canada, whereas 7% were landed immigrants.

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

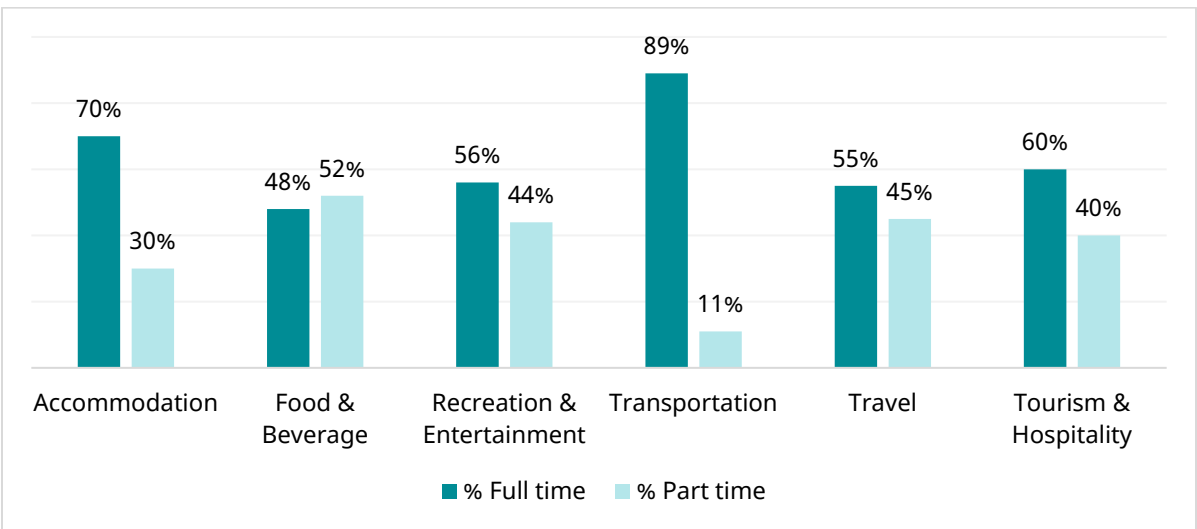


Source: THRC Employment Tracker, LFS Statistics Canada.

## EMPLOYMENT STATUS AND WAGES

Approximately 60% of the provincial workforce is employed on a full-time basis and 40% is employed part-time. The transportation industry has the highest percentage of full-time workers (89%) while the food and beverage services industry has the highest percentage of part-time workers (52%).

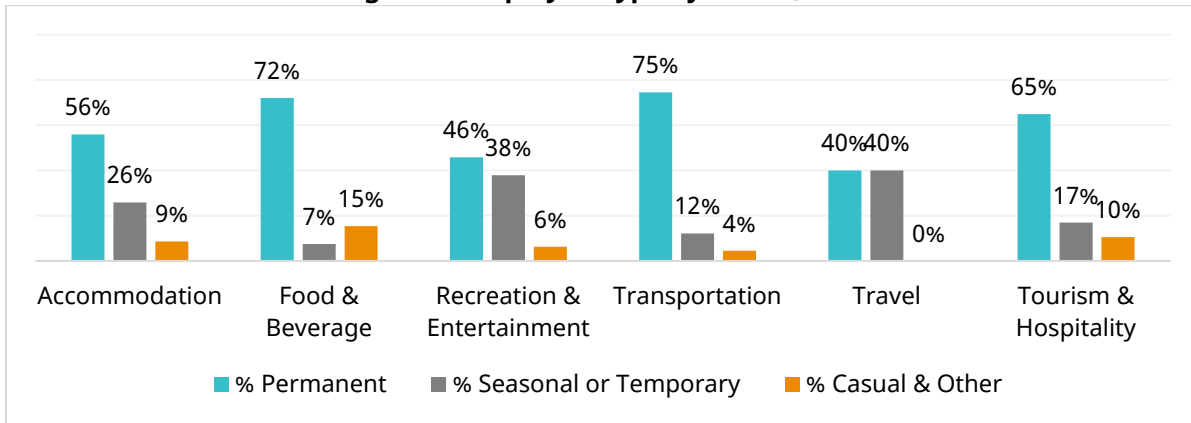
**Figure 6: Job Status by Industry and Sector, 2022**



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

Permanent workers account for 65% of the workforce, while 27% are seasonal, temporary, or casual workers (the remaining 8% of the workers have an unknown status in the Labour Force Survey). The transportation industry has the highest percentage of permanent employees (75%), whereas the travel services industry has the highest percentage of seasonal employees (40%).

**Figure 7: Employee Type by Sector, 2022**

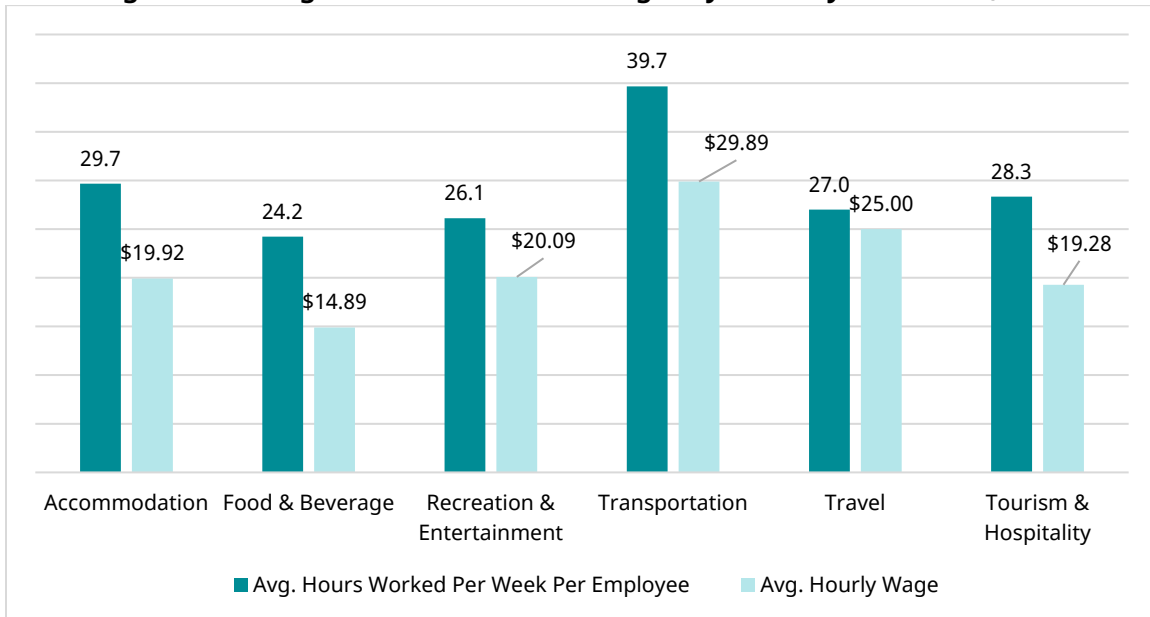


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

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

The average wage rate is \$19 per hour and the average hours worked per week is 28. Employees in the transportation industry work the most hours per week (of 40 hours per employee) and are paid the highest average hourly wage (\$30 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 Newfoundland and Labrador's tourism sector workforce have been employed in their current positions for seven years. The transportation industry has the longest average length of employment of 12.3 years, while food and beverage services and travel service industries have the shortest average length of employment of 4.8 years.

**Table 3: Tourism Industry and Sector Workforce Experience, 2022**

Years of Employment	Accommodation		Food & Beverage services		Recreation & Entertainment		Transportation		Travel services		Tourism	
	#	%	#	%	#	%	#	%	#	%	#	%
Less than 1	639	25%	1,861	17%	1,083	22%	250	6%	111	36%	3,944	17%
1 to 2	417	16%	3,889	35%	1,083	22%	444	10%	0	0%	5,833	25%
2 to 4	250	10%	2,917	26%	1,056	22%	1,194	27%	42	14%	5,444	23%
5 to 7	389	15%	1,278	11%	750	15%	444	10%	111	36%	2,972	13%
8 to 10	56	2%	194	2%	111	2%	333	8%	42	14%	722	3%
11 to 15	139	5%	361	3%	472	10%	611	14%	0	0%	1,583	7%
16 to 20	139	5%	417	4%	139	3%	250	6%	0	0%	944	4%
Over 20	500	20%	333	3%	194	4%	833	19%	0	0%	1,861	8%
<b>Total</b>	<b>2,500</b>	<b>100%</b>	<b>11,222</b>	<b>100%</b>	<b>4,917</b>	<b>100%</b>	<b>4,361</b>	<b>100%</b>	<b>306</b>	<b>100%</b>	<b>23,306</b>	<b>100%</b>
<i><b>Avg. Length</b></i>	<i><b>10.7 years</b></i>		<i><b>4.8 years</b></i>		<i><b>5.4 years</b></i>		<i><b>12.3 years</b></i>		<i><b>4.8 years</b></i>		<i><b>7.0 years</b></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 Newfoundland and Labrador'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"> <li>On-the-job training</li> </ul>	Food & Beverage services	3,139	\$13.60	2.9
6322	Cooks	<ul style="list-style-type: none"> <li>Completion of a three-year apprenticeship program for cooks or completion of college or other program in cooking or food safety</li> </ul>	Food & Beverage services	2,194	\$16.80	5.2
6513	Food and beverage servers	<ul style="list-style-type: none"> <li>On the job training</li> <li>Responsible beverage service certification</li> </ul>	Food & Beverage services	2,000	\$14.90	4.6
5254	Program leaders and instructors in recreation, sport and fitness	<ul style="list-style-type: none"> <li>College program in recreation or physical education</li> <li>Extensive sport related training</li> <li>Coaching and refereeing certificates</li> </ul>	Recreation & Entertainment	1,667	\$16.50	4.1
6611	Cashiers	<ul style="list-style-type: none"> <li>On-the-job training</li> </ul>	Food & Beverage services	1,528	\$13.20	4.0
6731	Light duty cleaners	<ul style="list-style-type: none"> <li>On-the-job training</li> <li>Certification for housekeeping room attendants or similar certification</li> </ul>	Accommodation	1,083	\$16.50	7.4
0631	Restaurant and food service managers	<ul style="list-style-type: none"> <li>Completion of a college or other program related to hospitality or food and beverage service management</li> <li>Several years of experience in the food service sector including supervisory experience</li> <li>Responsible beverage service certification</li> </ul>	Food & Beverage services	972	\$26.00	14.3
6311	Food service supervisors	<ul style="list-style-type: none"> <li>Completion of a community college program in food service administration, hotel and restaurant management or related discipline, or equivalent job experience</li> </ul>	Food & Beverage services	694	\$17.70	6.1
7512	Bus drivers, subway operators and other transit operators	<ul style="list-style-type: none"> <li>Appropriate class driver's license</li> <li>Additional certifications such as First-Aid, Transportation of Dangerous Goods, and Air Brakes Endorsement</li> </ul>	Transportation	611	\$22.00	4.9
6512	Bartenders	<ul style="list-style-type: none"> <li>Responsible beverage service certification</li> <li>On-the-job training</li> </ul>	Food & Beverage services	611	\$14.50	5.2
6722	Operators and attendants in amusement, recreation, and sport	<ul style="list-style-type: none"> <li>On-the-job training</li> </ul>	Recreation & Entertainment	472	\$18.00	5.4
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> <li>On the job training</li> </ul>	Food & Beverage services	472	\$14.10	2.9

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
2271	Air pilots, flight engineers and flying instructors	<p>Pilots and flight engineers</p> <ul style="list-style-type: none"> <li>A university degree or college diploma may be required.</li> <li>A commercial pilot's licence or an air transport pilot's licence is required.</li> <li>Additional licences or endorsements to fly different types of aircraft are required.</li> <li>Flight engineers require a flight engineer licence issued by Transport Canada.</li> <li>Structured training is provided by employers.</li> </ul> <p>Flight instructors</p> <ul style="list-style-type: none"> <li>A university degree or college diploma may be required.</li> <li>A commercial pilot's or an air transport pilot's licence is required.</li> <li>Transport Canada ratings and endorsements to provide instructions on different types of aircraft are required.</li> </ul>	Transportation	389	\$38.00	6.4
0632	Accommodation service managers	<ul style="list-style-type: none"> <li>A university degree or college diploma in hotel management or other related discipline or equivalent job experience</li> </ul>	Accommodation	278	\$65.00	28.0
0731	Managers in transportation	<p>Managers in transportation operations</p> <ul style="list-style-type: none"> <li>A bachelor's degree in business administration or engineering is usually required.</li> <li>Several years of experience in transportation operations are usually required, including supervisory experience.</li> <li>Extensive experience as a supervisor and operator in a particular transport mode, such as a pilot, train engineer, vessel master or truck driver, may substitute for formal education.</li> <li>Certification as an operator of a particular mode of transportation, such as commercial pilot, vessel master or truck driver, is usually required.</li> </ul> <p>Managers in transportation freight traffic</p> <ul style="list-style-type: none"> <li>A college diploma or university degree in business or transportation administration may be required.</li> <li>Several years of clerical, operational or administrative experience related to freight traffic are required.</li> </ul>	Transportation	278	\$47.00	12.5
7513	Taxi and limousine drivers and chauffeurs	<ul style="list-style-type: none"> <li>Appropriate class driver's license</li> <li>Additional certifications such as First-Aid, Transportation of Dangerous Goods, and Air Brakes Endorsement</li> </ul>	Transportation	278	\$17.50	16.2

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
6733	Janitors, caretakers and building superintendents	<ul style="list-style-type: none"> <li>Some occupations in this unit group require previous cleaning and maintenance experience.</li> <li>A journeyman/woman certificate in one or more of the trades or a building operator certificate may be required for building superintendents.</li> </ul>	Food & Beverage services	250	\$18.40	7.1
5212	Technical occupations related to museums and art galleries	<ul style="list-style-type: none"> <li>Registrars, cataloguers, and interpreters may require a university degree in a field related to museum and gallery work.</li> <li>For other occupations in this unit group, completion of a college program in museum technology or conservation technology or completion of other technical or on-the-job training programs related to the work are required.</li> </ul>	Recreation & Entertainment	250	\$22.00	7.6
6313	Accommodation, travel, tourism, and related services supervisors	<ul style="list-style-type: none"> <li>Related post-secondary degree or diploma</li> <li>Extensive practical experience and training</li> </ul>	Accommodation	250	\$26.00	9.8

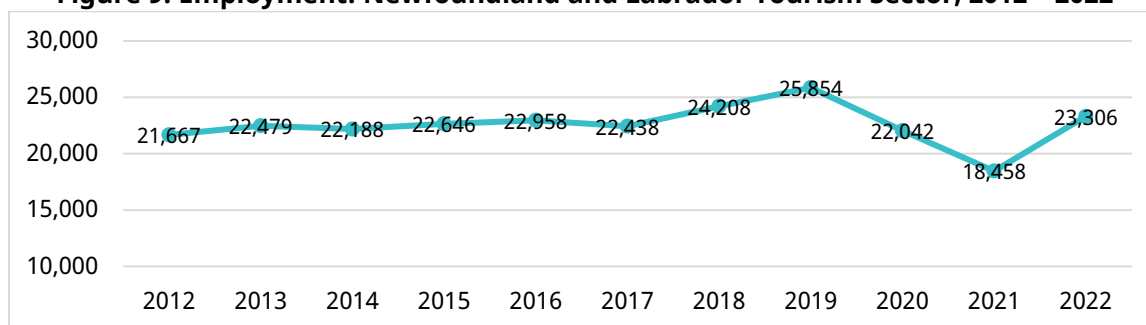
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

## 2. IMPACT OF THE PANDEMIC

### CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 2.6% from 2012 to 2019, rising from an average of 21,667 employees per month in 2012 to 25,854 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (23,306 employees per month) remain below pre-pandemic levels.

**Figure 9: Employment: Newfoundland and Labrador Tourism Sector, 2012 – 2022**

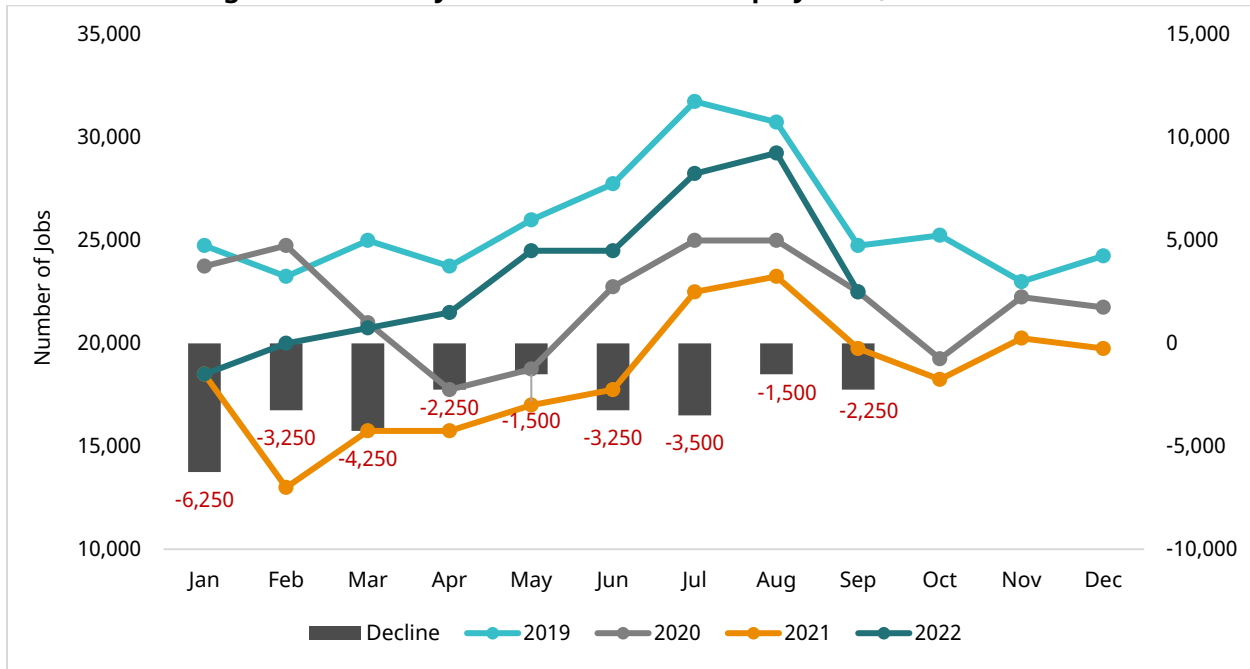


*Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.*

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 10% in 2022 relative to 2019, the percentage varies from growth of 15% in recreation and entertainment to losses of 36% in the accommodation 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	3,917	3,042	1,792	2,500	-22%	-54%	-36%
Food and Beverage services	12,042	11,708	8,979	11,222	-3%	-25%	-7%
Recreation and Entertainment	4,271	3,563	4,167	4,917	-17%	-2%	15%
Transportation	5,396	3,708	3,354	4,361	-31%	-38%	-19%
Travel services	229	21	167	306	-91%	-27%	34%
<b>Total</b>	<b>25,854</b>	<b>22,042</b>	<b>18,458</b>	<b>23,306</b>	<b>-15%</b>	<b>-29%</b>	<b>-10%</b>

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. Temporary workers, males and the oldest workers (those 65 and above, many of whom stayed home because of health concerns), and the most educated workers were the most likely to be displaced. The relative balance in decline between part-time and full-time workers in 2020 masks the fact that many of the full-time workers became part-time workers while those who previously worked part-time were displaced.

Since 2020, the impact has become more balanced. For example, many if not most of the older workers (65 years and older) and those with a bachelor's degree or above 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, there continues to be a large decline in employment amongst workers aged 35 to 44 in 2022 as compared to 2019.

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

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
<b>Job Status</b>							
Full-time	17,875 (69%)	15,125 (69%)	12,021 (65%)	14,028 (60%)	-15%	-33%	-22%
Part-time	8,042 (31%)	6,938 (31%)	6,438 (35%)	9,306 (40%)	-14%	-20%	16%
<b>Permanent</b>							
Permanent	17,271 (67%)	15,792 (72%)	11,125 (60%)	15,139 (65%)	-9%	-36%	-12%
Seasonal	2,354 (9%)	1,875 (9%)	2,042 (11%)	2,333 (10%)	-20%	-13%	-1%
Casual	2,375 (9%)	1,833 (8%)	1,750 (9%)	2,083 (9%)	-23%	-26%	-12%
Temporary	1,958 (8%)	1,021 (5%)	979 (5%)	1,611 (7%)	-48%	-50%	-18%
<b>Gender</b>							
Male	12,813 (50%)	9,500 (43%)	9,479 (51%)	11,611 (50%)	-26%	-26%	-9%
Female	13,063 (50%)	12,583 (57%)	9,000 (49%)	11,722 (50%)	-4%	-31%	-10%
<b>Age Group</b>							
15 to 24	8,625 (33%)	6,292 (29%)	6,104 (33%)	8,861 (38%)	-27%	-29%	3%
25 to 34	4,354 (17%)	5,333 (24%)	3,125 (17%)	3,778 (16%)	22%	-28%	-13%
35 to 44	4,417 (17%)	3,313 (15%)	2,729 (15%)	2,972 (13%)	-25%	-38%	-33%
45 to 54	3,417 (13%)	3,646 (17%)	2,917 (16%)	3,500 (15%)	7%	-15%	2%
55 to 64	3,875 (15%)	2,771 (13%)	2,813 (15%)	3,139 (13%)	-28%	-27%	-19%
65 or above	1,208 (5%)	729 (3%)	750 (4%)	1,139 (5%)	-40%	-38%	-6%
<b>Education</b>							

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Below high school	3,792 (15%)	3,104 (14%)	3,063 (17%)	4,306 (18%)	-18%	-19%	14%
High school or some post-secondary	9,604 (37%)	8,063 (37%)	6,604 (36%)	8,333 (36%)	-16%	-31%	-13%
Degree below bachelor's	9,146 (35%)	8,375 (38%)	6,396 (35%)	7,639 (33%)	-8%	-30%	-16%
Bachelor's degree or above	3,417 (13%)	2,438 (11%)	2,438 (13%)	3,083 (13%)	-29%	-29%	-10%

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

The loss of experienced workers is evident in the decline in workers with 8 to 10 years, 11 to 15 years and 16 to 20 years of experience. There was also a large reduction in employees with less than one year experience because fewer new workers entered the industry.

**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	5,917	3,979	3,938	3,944	-33%	-33%	-33%
1 year	5,146	4,604	2,625	5,833	-11%	-49%	13%
2 to 4 years	5,688	5,708	4,604	5,444	0%	-19%	-4%
5 to 7 years	2,500	2,396	1,604	2,972	-4%	-36%	19%
8 to 10 years	2,000	1,917	1,438	722	-4%	-28%	-64%
11 to 15 years	1,833	1,500	1,625	1,583	-18%	-11%	-14%
16 to 20 years	1,604	917	625	944	-43%	-61%	-41%
Over 20 years	1,167	1,063	2,000	1,861	-9%	71%	59%
<b>Total</b>	<b>25,854</b>	<b>22,042</b>	<b>18,458</b>	<b>23,306</b>	<b>-15%</b>	<b>-29%</b>	<b>-10%</b>
<b>Avg. years</b>	<b>6.4</b>	<b>6.4</b>	<b>7.8</b>	<b>7.0</b>	<b>-</b>	<b>-</b>	<b>-</b>

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 11% in 2020. All industries, with the exception of transportation, have experienced a decrease in average hours per week relative to 2019.

**Table 8: Newfoundland and Labrador 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	32.4	30.9	29.9	29.7	-5%	-8%	-8%
Food and Beverage services	28.0	25.0	27.5	24.2	-11%	-2%	-14%
Recreation and Entertainment	26.8	22.3	28.9	26.1	-17%	8%	-3%
Transportation	36.1	33.8	36.6	39.7	-6%	1%	10%
Travel services	46.0	n/a	32.0	27.0	n/a	-30%	-41%
<b>Tourism Newfoundland and Labrador</b>	<b>30.3</b>	<b>26.9</b>	<b>29.8</b>	<b>28.3</b>	<b>-11%</b>	<b>-2%</b>	<b>-7%</b>

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

Overall, the average hourly wage in Newfoundland and Labrador's tourism sector fluctuated during the pandemic. Average hourly wage decreased in 2020 by 2%, increased by 6% in 2021 and increased by 7% in 2022 as compared to 2019.

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

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	\$16.92	\$18.41	\$17.20	\$19.92	9%	2%	18%
Food and Beverage services	\$13.30	\$13.61	\$14.08	\$14.89	2%	6%	12%
Recreation and Entertainment	\$20.56	\$19.60	\$20.78	\$20.09	-5%	1%	-2%
Transportation	\$28.00	\$28.50	\$31.67	\$29.89	2%	13%	7%
Travel services	\$16.70	\$15.87	\$24.00	\$25.00	-5%	44%	50%
<b>Tourism Newfoundland and Labrador</b>	<b>\$18.06</b>	<b>\$17.66</b>	<b>\$19.18</b>	<b>\$19.28</b>	<b>-2%</b>	<b>6%</b>	<b>7%</b>

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

## 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.

**Table 10: Employment of Leading Occupations in Newfoundland and Labrador'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	3,354	3,167	2,625	3,139	-6%	-22%	-6%
6322	Cooks	2,396	2,563	1,542	2,194	7%	-36%	-8%
6513	Food and beverage servers	2,063	1,688	1,083	2,000	-18%	-47%	-3%
5254	Program leaders and instructors in recreation, sport and fitness	1,229	958	1,146	1,667	-22%	-7%	36%
6611	Cashiers	1,313	1,688	1,250	1,528	29%	-5%	16%
6731	Light duty cleaners	938	792	271	1,083	-16%	-71%	16%
0631	Restaurant and food service managers	938	1,292	1,438	972	38%	53%	4%
6311	Food service supervisors	1,063	979	1,000	694	-8%	-6%	-35%
7512	Bus drivers, subway operators and other transit operators	500	250	250	611	-50%	-50%	22%
6512	Bartenders	875	250	396	611	-71%	-55%	-30%
6722	Operators and attendants in amusement, recreation and sport	458	354	667	472	-23%	45%	3%
6511	Maîtres d'hôtel and hosts/hostesses	563	333	229	472	-41%	-59%	-16%
2271	Air pilots, flight engineers and flying instructors	458	229	146	389	-50%	-68%	-15%
0632	Accommodation service managers	479	167	271	278	-65%	-43%	-42%
0731	Managers in transportation	167	125	21	278	-25%	-88%	67%
7513	Taxi and limousine drivers and chauffeurs	583	229	250	278	-61%	-57%	-52%
6733	Janitors, caretakers and building superintendents	354	521	208	250	47%	-41%	-29%
5212	Technical occupations related to museums and art galleries	313	167	125	250	-47%	-60%	-20%
6313	Accommodation, travel, tourism, and related services supervisors	146	146	83	250	0%	-43%	71%

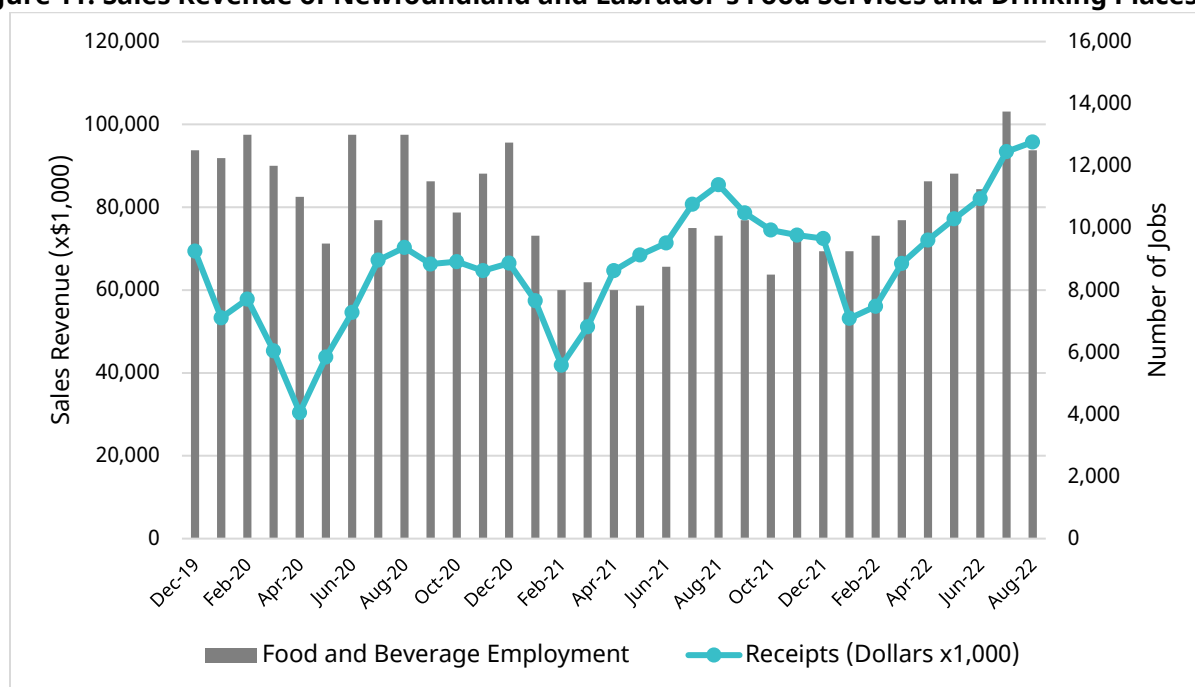
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.



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

The following chart compares monthly food service and drinking places' revenues from December 2019 to Aug 2022 reported by Statistics Canada on employment levels for the food and beverage services industry reported through the Labour Force Survey. The data suggests employment levels recovered more quickly in 2020 than did revenues, even though many operations were able to increase prices somewhat during the pandemic. By April of 2021, the growth of the revenues surpassed the growth of the food and beverage services industry employment levels until December 2021. In August 2022, revenues surpassed growth of employment levels again.

**Figure 11: Sales Revenue of Newfoundland and Labrador's Food Services and Drinking Places**



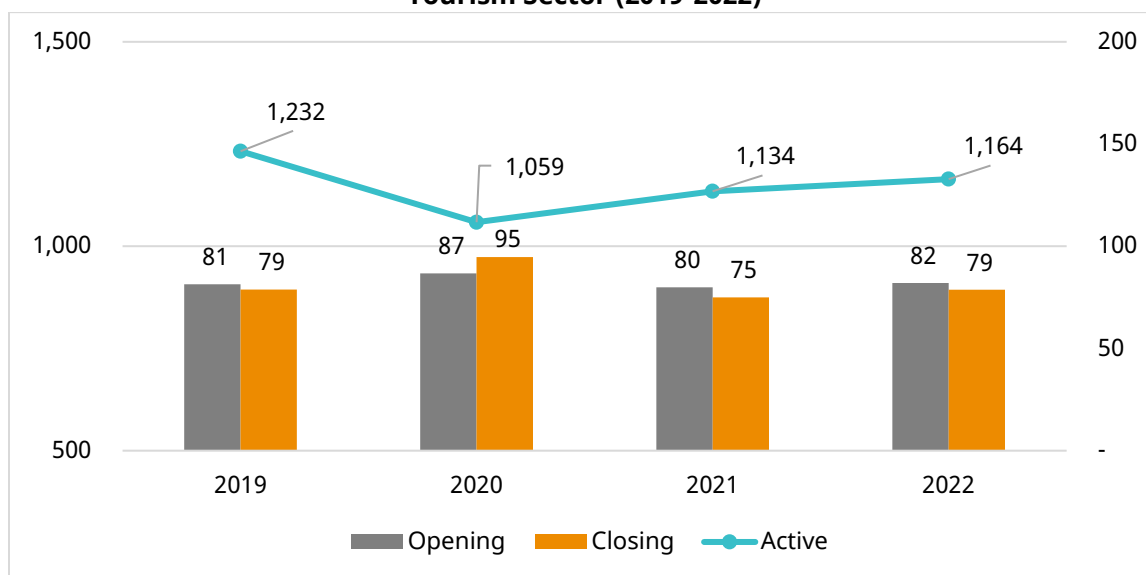
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000)

## CHANGES IN THE NUMBER OF ACTIVE BUSINESSES

Statistics Canada defines business openings as businesses with employment in the current month and no employment in the previous month, while business closures are defined as businesses that had employment in the previous month, but no employment in the current month. Active businesses are defined as those businesses that reported having one or more employees in a given

month. During the pandemic, the tourism sector not only saw a decline in employment, but also a decline in the number of active businesses. The number of active tourism businesses declined from 1,232 in 2019 to 1,059 in 2020 before increasing to 1,164 in 2022.

**Figure 12: Avg. Monthly Business Opening and Closures, Newfoundland and Labrador'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.<sup>6</sup> 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.

<sup>6</sup> 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, Newfoundland and Labrador (2019-2022)**

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	3,917	3,042	1,792	2,500	-875	-1,250	708
Food and Beverage services	12,042	11,708	8,979	11,222	-334	-2,729	2,243
Recreation and Entertainment	4,271	3,563	4,167	4,917	-708	604	750
Transportation	5,396	3,708	3,354	4,361	-1,688	-354	1,007
Travel services	229	21	167	306	-208	146	139
<b>Sector Totals</b>	<b>25,854</b>	<b>22,042</b>	<b>18,458</b>	<b>23,306</b>	<b>-3,812</b>	<b>-3,584</b>	<b>4,848</b>
Accommodation and food services (non-tourism)	1,104	833	1,083	583	-271	250	-500
Administrative and support, waste management and remediation services	7,313	6,521	6,688	6,111	-792	167	-576
Agriculture, forestry, fishing and hunting	6,083	5,354	5,354	5,361	-729	-	7
Arts, entertainment and recreation (non-tourism)	208	83	271	56	-125	188	-215
Construction	19,521	15,979	16,250	17,361	-3,542	271	1,111
Educational services	15,813	16,313	16,854	17,278	500	542	424
Finance and insurance	3,875	5,271	4,833	4,250	1,396	-438	-583
Health care and social assistance	39,625	40,146	43,750	43,472	521	3,604	-278
Information and cultural industries	2,792	2,208	2,479	2,139	-583	271	-340
Manufacturing	9,271	8,542	10,563	9,722	-729	2,021	-840
Mining, quarrying, and oil and gas extraction	9,500	8,667	9,521	10,056	-833	854	535
Other services (except public administration)	10,396	10,042	7,938	8,361	-354	-2,104	424
Professional, scientific and technical services	9,563	9,542	10,688	11,444	-21	1,146	757
Public administration	18,063	17,083	19,771	20,556	-979	2,688	785
Real estate and rental and leasing	2,563	1,958	1,667	2,194	-604	-292	528
Retail trade	30,813	29,979	31,417	31,833	-833	1,438	417
Transportation and warehousing (non-tourism)	6,604	6,208	5,333	6,333	-396	-875	1,000

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Utilities	2,688	2,583	1,938	1,417	-104	-646	-521
Wholesale trade	5,313	4,771	5,271	5,611	-542	500	340
<b>Total Newfoundland and Labrador Employment</b>	<b>226,979</b>	<b>214,042</b>	<b>220,125</b>	<b>227,444</b>	<b>-12,938</b>	<b>6,083</b>	<b>7,319</b>

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 services. The results were published in July 2022. The following table summarizes their projections regarding employment in the Newfoundland and Labrador'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 6.0%. The leading industry in terms of growth is expected to be accommodation (11.6%).

**Table 12: Projected Growth Rates in Newfoundland and Labrador's Tourism Sector by Industry (2021-2025)**

Newfoundland and Labrador	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
<b>Tourism Sector Totals</b>	18,458	21,630	22,692	23,078	23,311	26.3%
<i>Year-over-year Growth</i>	-	17.2%	4.9%	1.7%	1.0%	6.0%
<b>Industry</b>						
Accommodation	1,792	2,539	2,716	2,749	2,777	55.0%
<i>year-over-year growth</i>	-	41.7%	6.9%	1.2%	1.0%	11.6%
Food and Beverage services	8,979	10,497	10,879	10,976	11,084	23.4%
<i>year-over-year growth</i>	-	16.9%	3.6%	0.9%	1.0%	5.4%
Recreation and Entertainment	4,167	4,597	4,912	5,007	5,096	22.3%
<i>year-over-year growth</i>	-	10.3%	6.9%	1.9%	1.8%	5.2%
Transportation	3,354	3,787	3,976	4,153	4,149	23.7%
<i>year-over-year growth</i>	-	12.9%	5.0%	4.5%	-0.1%	5.5%
Travel services	167	175	193	203	210	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.<sup>7</sup> 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).

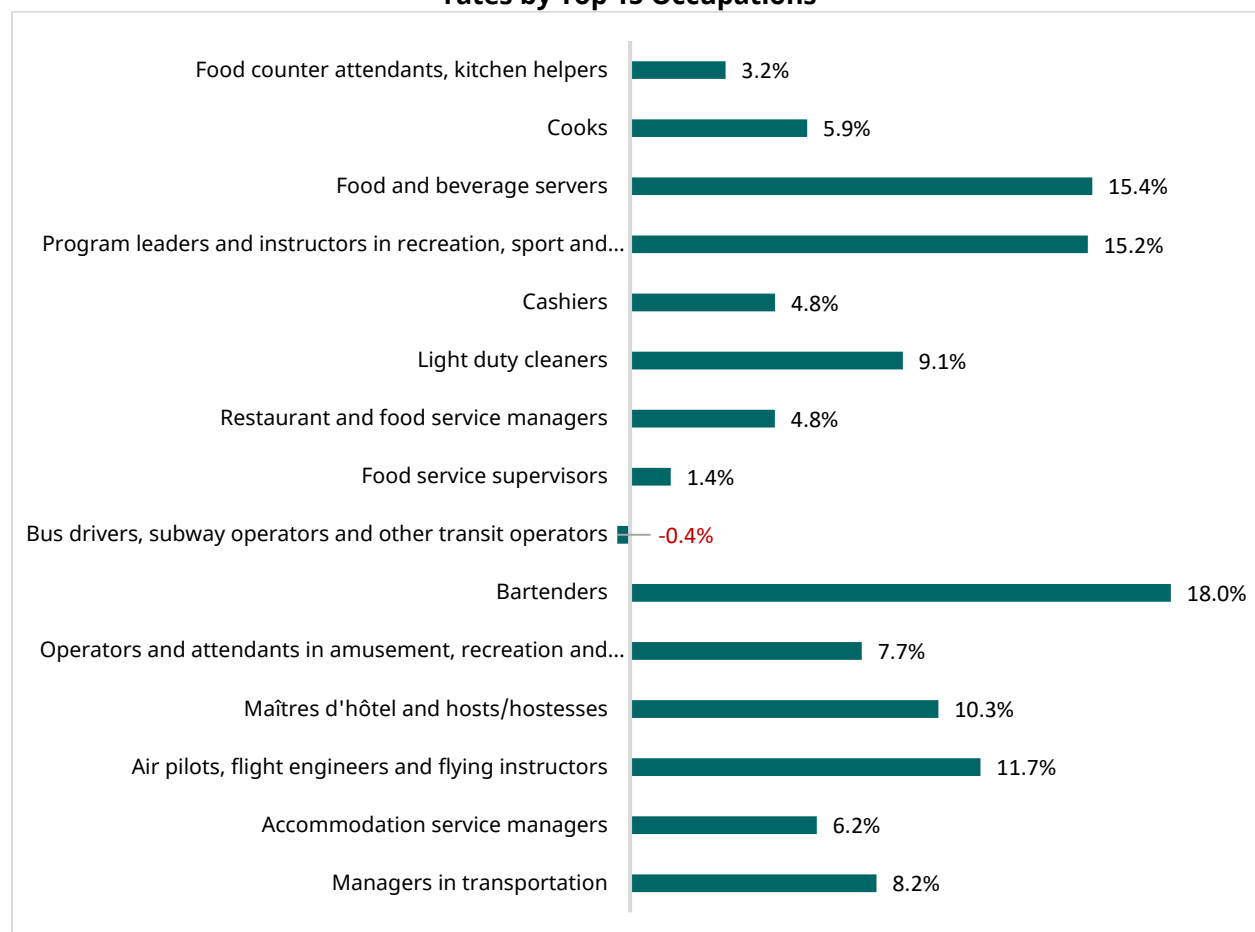
<sup>7</sup> Business Intelligence Survey, Labour Market Information, Tourism HR Canada, 2022



## EMPLOYMENT BY OCCUPATION

The following chart shows the projected four-year compounded annual growth in Newfoundland and Labrador's tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be bartenders, food and beverage servers and program leaders and instructors in recreation, sports and fitness. The number of bus drivers, subway operators and other transit operators are projected to decline slightly.

**Figure 13: Newfoundland and Labrador Tourism Projected 5-year compounded annual growth rates by Top 15 Occupations<sup>8</sup>**



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

<sup>8</sup> Detailed descriptions of these occupations can be found here:  
<https://noc.esdc.gc.ca/Structure/Hierarchy?objectid=%2Fd0IGA6qD8JPRfoj5UCjpg%3D%3D>

