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# SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

**ATALYST**  
RESEARCH GROUP

**Provincial Report Series: Nova Scotia**



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

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*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 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 Nova Scotia, 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 Nova Scotia'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 Nova Scotia'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 NOVA SCOTIA TOURISM SECTOR

Nova Scotia's tourism sector is comprised of companies which provide accommodation, food and beverage services, recreation and entertainment, transportation and travel services. Top tourist attractions include Peggy's Cove, Cabot trail, Lunenburg, whale watching, and Cape Breton Highlands.<sup>1</sup> The Halifax International Airport Authority (HIAA) plays an important role in enabling the growth of tourism in Nova Scotia.<sup>2</sup> In 2019, the sector was employing more than 39,000 people and generating about \$2.6 billion in revenues.<sup>3</sup>

Tourism is one of Nova Scotia's biggest economic engines and was hit hard during the pandemic due to the travel restrictions that were in place both in and out of the province. The \$2.6-billion industry dropped by \$1 billion per year in 2020 and 2021.<sup>4</sup> Nova Scotia's tourism sector began to recover from the pandemic in July and August as border restrictions loosened up and people started travelling again. While visitation and hotel bookings continue to remain below pandemic levels, the tourism sector in the province is showing a positive outlook. To further help the industry's recovery, in March 2022, the provincial government announced a \$12 million investment in tourism marketing and digital adoption programming to help strengthen Nova Scotia's tourism sector in 2022 and beyond. The funding includes \$9.2 million for registered tourist accommodations to implement marketing activities and build demand.<sup>5</sup>

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<sup>1</sup> <https://www.novascotia.com/trip-ideas/top-25>

<sup>2</sup> <https://halifaxchamber.com/business-voice/nova-scotias-value-proposition/>

<sup>3</sup> <https://halifaxchamber.com/business-voice/nova-scotias-value-proposition/>

<sup>4</sup> <https://www.cbc.ca/news/canada/nova-scotia/tourism-demand-soaring-1.6478224>

<sup>5</sup> <https://novascotia.ca/news/release/?id=20220302003#:~:text=The%20Province%20announced%20a%20%2412,and%20build%20demand%20in%202022>

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

Nova Scotia's tourism sector employed an average of 46,528 employees through the first nine months of 2022, of whom 49% were employed in food and beverage services and 23% in recreation and entertainment.

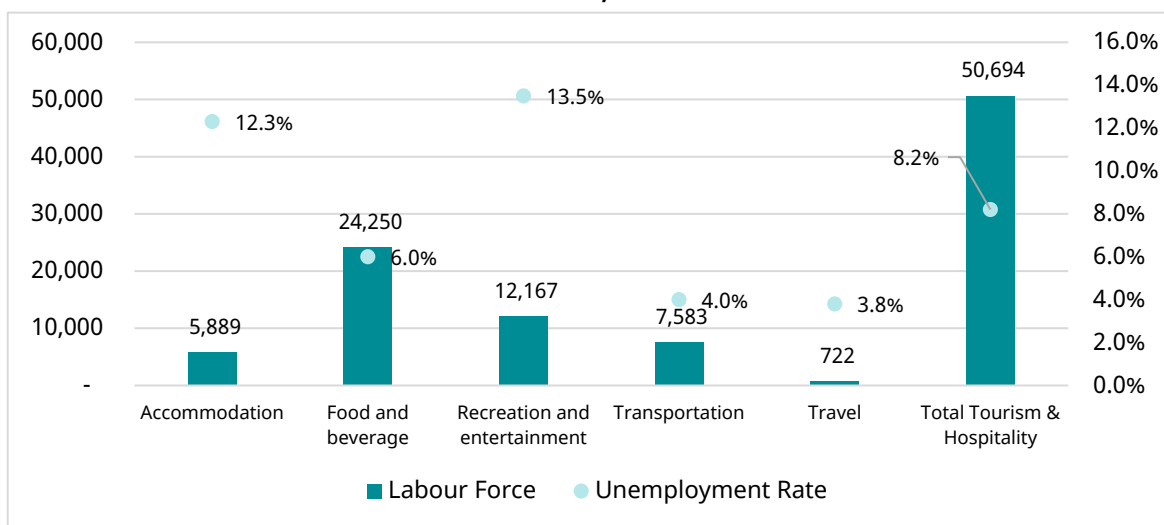
**Table 1: Employment in the Nova Scotia Tourism Industry and Sector, 2022**

Industry	Nova Scotia	
	#	%
Accommodation	5,167	11%
Food and beverage services	22,806	49%
Recreation and entertainment	10,583	23%
Transportation	7,306	16%
Travel services	667	1%
<b>Tourism Sector Total</b>	<b>46,528</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 50,694 through the first nine months of 2022. Unemployment averaged 8.2%.

**Figure 1: Total Labour Force and Unemployment Rate, Nova Scotia 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 Nova Scotia tourism sector accounts for approximately 10% of the total employment in Nova Scotia, the same as the national tourism industry average.

**Table 2: Nova Scotia Tourism Sector Industry vs Total Employment, 2022**

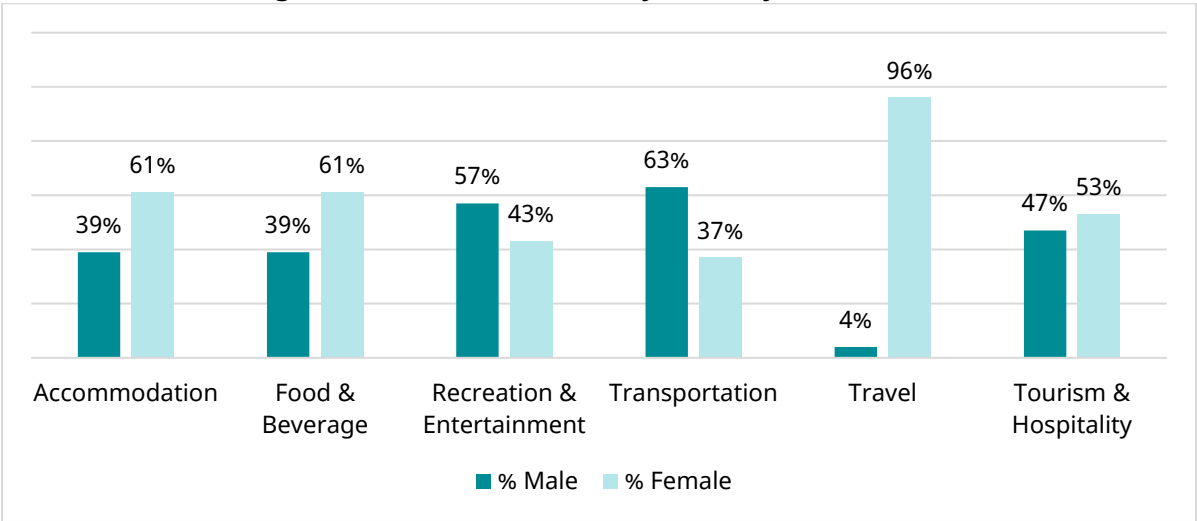
Employment	Nova Scotia	Canada
Tourism	46,528	1,859,806
Overall Employment	478,083	19,523,917
Percent Tourism of Overall Employment	9.7%	9.5%

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

## DEMOGRAPHIC CHARACTERISTICS

The workforce is relatively evenly divided in terms of gender. The transportation industry has the highest concentration of male workers (63%) while the travel services industry has the highest concentration of female workers (96%).

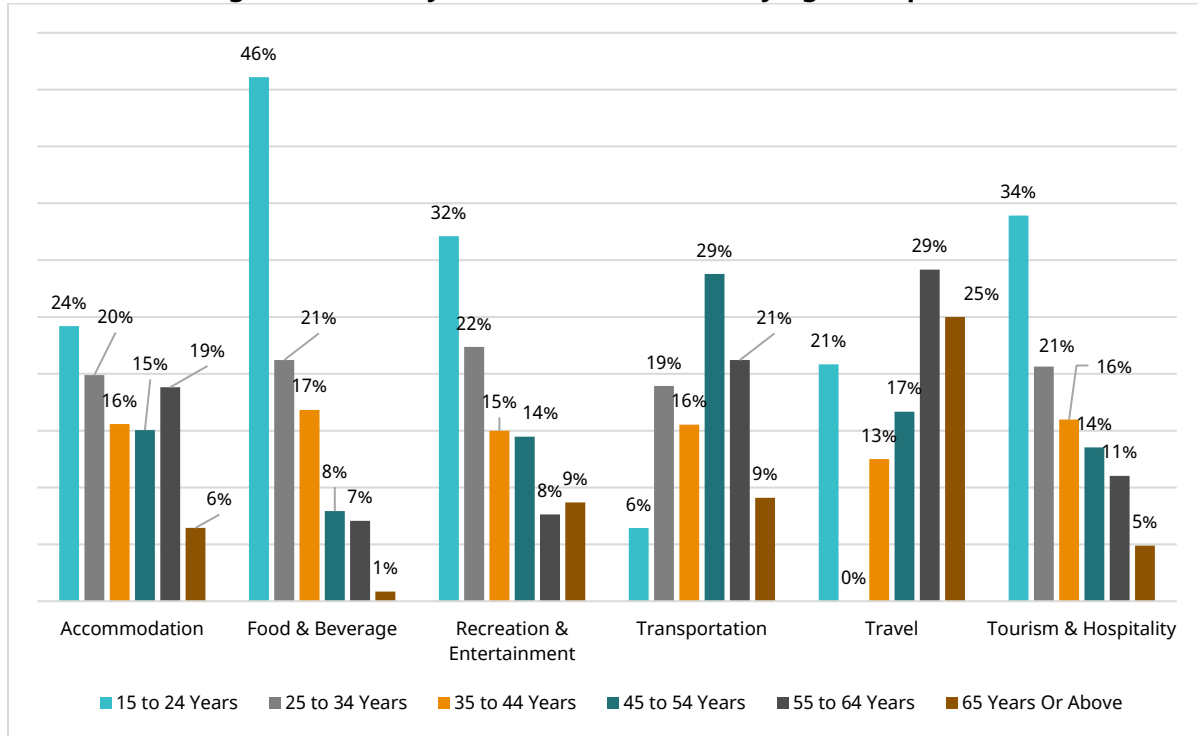
**Figure 2: Workforce Gender by Industry and Sector, 2022**



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

The food and beverage services industry has the youngest workforce with 46% of its workers being between 15 and 24 years of age, while the travel services industry is the oldest with 54% of its workers being 55 years or older. Slightly over half of the workforce is under the age of 35.

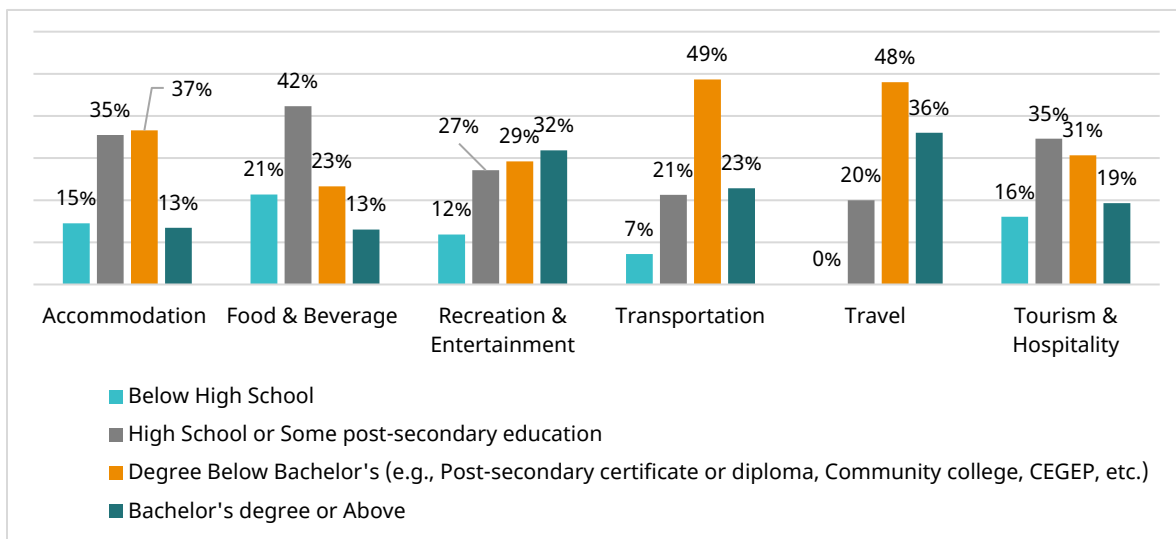
**Figure 3: Industry and Sector Workforce by Age Groups, 2022**



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

Half (50%) 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).

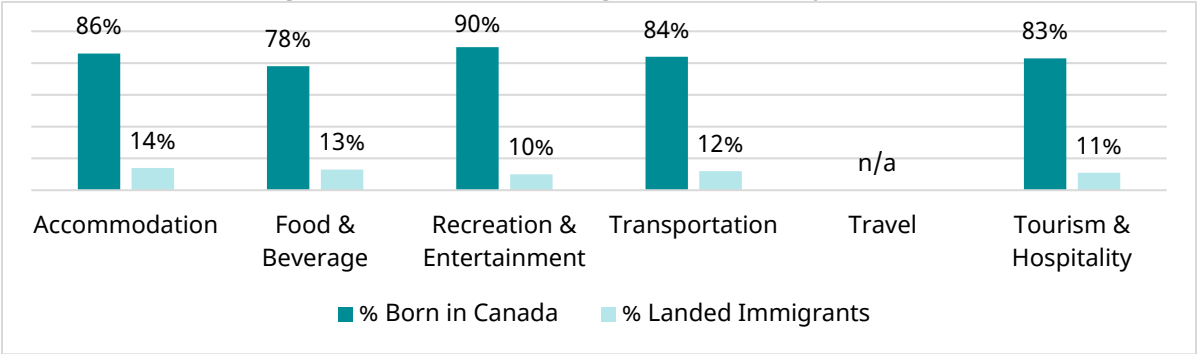
**Figure 4: Workforce Education Level by Industry and Sector, 2022**



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

In 2022, 83% of the tourism industry workforce stated they were born in Canada and 11% landed immigrants. The majority of the workforce who were born in Canada work in the recreation and entertainment industry while the majority of landed immigrants work in the accommodation industry.

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

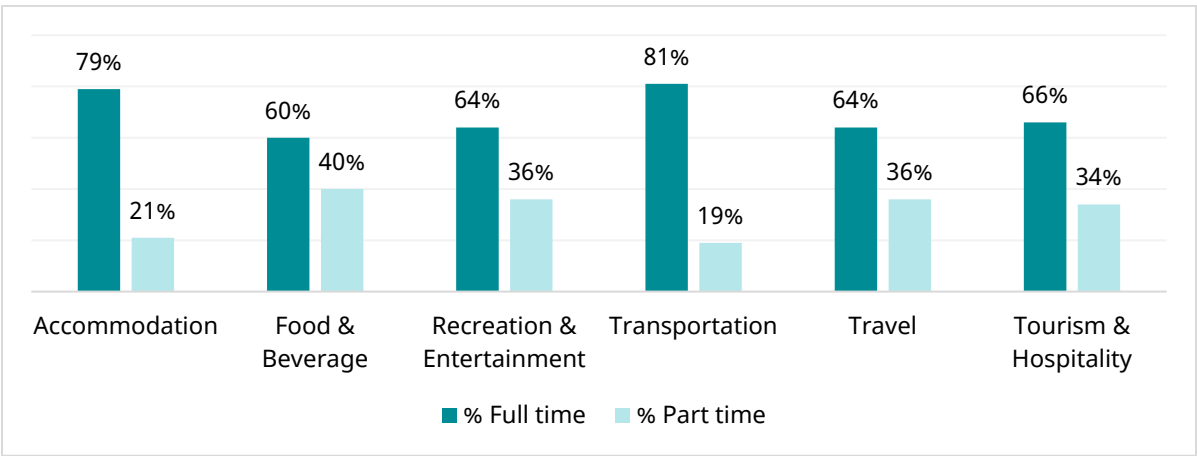


Source: THRC Employment Tracker, LFS Statistics Canada.

## EMPLOYMENT STATUS AND WAGES

Approximately 66% of the provincial workforce is employed on a full-time basis and 34% is employed part-time. The transportation industry has the highest percentage of full-time workers (81%) while the food and beverage services industry has the highest percentage of part-time workers (40%).

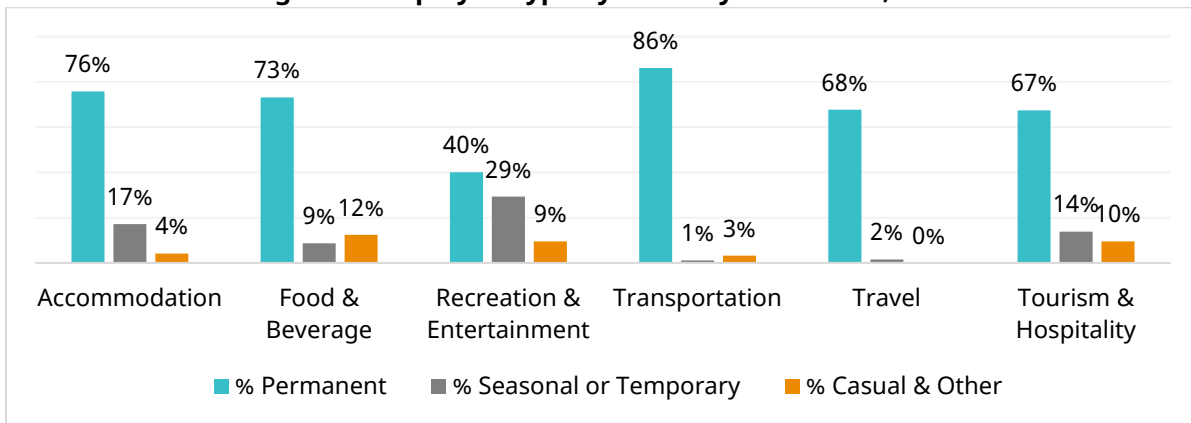
**Figure 6: Job Status by Industry and Sector, 2022**



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**

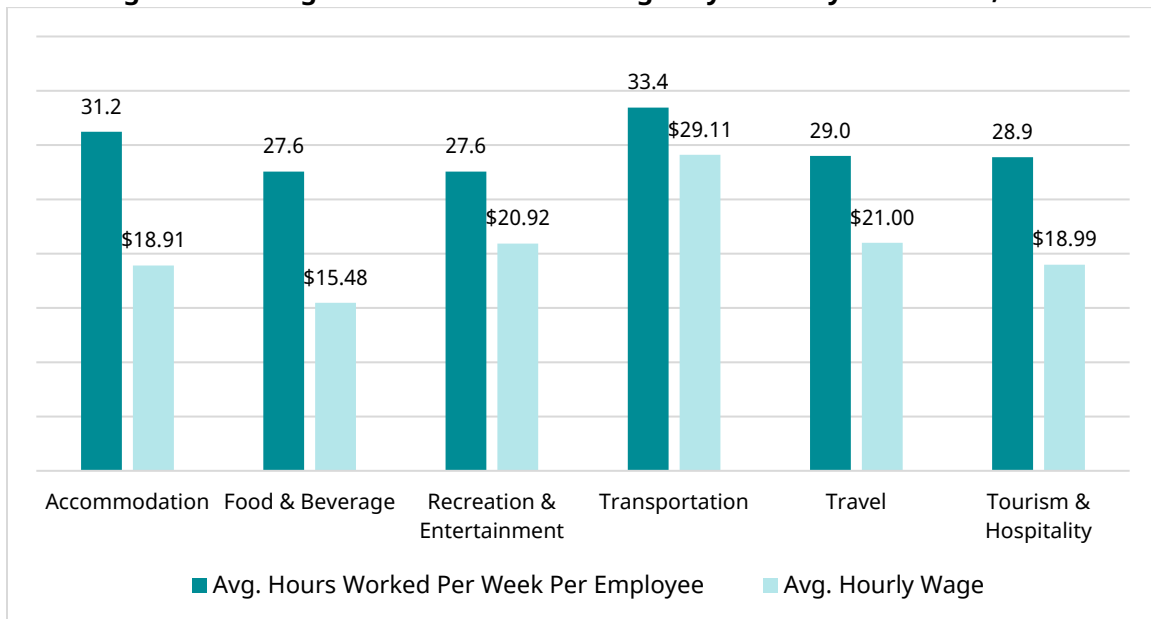


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

\*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 \$19 per hour and the average hours worked per week is 29. Employees in the transportation industry work the most hours per week (of 33 hours per employee) and are paid the highest average hourly wage (\$29 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 Nova Scotia tourism sector workforce have been employed in their current positions for seven years. In terms of sectors, transportation industry has the longest average length of employment of 11.4 years, while food and beverage services industry has the shortest average length of employment of 5.1 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	833	16%	4,583	20%	2,361	22%	1,000	14%	56	8%	8,833	19%
1 to 2	972	19%	6,444	28%	1,889	18%	806	11%	250	36%	10,361	22%
2 to 4	1,000	19%	6,444	28%	2,389	23%	944	13%	56	8%	10,833	23%
5 to 7	1,056	20%	2,083	9%	1,417	13%	333	5%	56	8%	4,889	11%
8 to 10	250	5%	889	4%	639	6%	1,056	14%	0	0%	2,833	6%
11 to 15	194	4%	806	4%	56	1%	1,556	21%	111	16%	2,778	6%
16 to 20	278	5%	306	1%	500	5%	611	8%	167	24%	1,861	4%
Over 20	583	11%	1,222	5%	1,333	13%	1,000	14%	0	0%	4,111	9%
<b>Total</b>	<b>5,167</b>	<b>100%</b>	<b>22,806</b>	<b>100%</b>	<b>10,583</b>	<b>100%</b>	<b>7,306</b>	<b>100%</b>	<b>667</b>	<b>100%</b>	<b>46,528</b>	<b>100%</b>
<b>Avg. Length</b>	<b>8.2 years</b>		<b>5.1 years</b>		<b>7.9 years</b>		<b>11.4 years</b>		<b>9.7 years</b>		<b>7.2 years</b>	

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 recreation and entertainment industries account for the occupations that have the highest average experience levels.

**Table 4: Leading Occupations in Nova Scotia'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	7,611	\$14.40	3.0
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	4,694	\$14.70	4.9
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	2,556	\$17.40	8.7
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	2,444	\$15.40	3.4
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	2,167	\$15.80	2.1
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	1,556	\$15.90	8.9
6611	Cashiers	<ul style="list-style-type: none"> <li>On-the-job training</li> </ul>	Food & Beverage services	1,444	\$14.10	4.0
6722	Operators and attendants in amusement, recreation and sport	<ul style="list-style-type: none"> <li>On-the-job training</li> </ul>	Recreation & Entertainment	1,222	\$15.20	3.8
6512	Bartenders	<ul style="list-style-type: none"> <li>Responsible beverage service certification</li> <li>On-the-job training</li> </ul>	Food & Beverage services	1,222	\$21.00	6.5
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> </ul>	Food & Beverage services	1,194	\$19.40	10.1

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
		<ul style="list-style-type: none"> <li>Several years of experience in the food service sector including supervisory experience</li> <li>Responsible beverage service certification</li> </ul>				
6321	Chefs	<ul style="list-style-type: none"> <li>Cook's trade certification or equivalent credentials, training and experience</li> <li>Chef's Red Seal Certification</li> </ul>	Food & Beverage services	1,056	\$18.20	4.9
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> <li>On the job training</li> </ul>	Food & Beverage services	1,056	\$17.70	7.0
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	972	\$23.00	6.3
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	722	\$16.50	13.9
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	639	\$35.00	11.9
6525	Hotel front desk clerks	<ul style="list-style-type: none"> <li>Completion of a two-year apprenticeship program, or a college program in front desk operations or hotel management</li> <li>Guest services representative trade certification</li> </ul>	Accommodation	556	\$14.30	4.2
6332	Bakers	<ul style="list-style-type: none"> <li>Completion of a three- or four-year apprenticeship program for bakers or completion of a college or other program for bakers or several years of commercial baking experience is usually required.</li> <li>On-the-job training</li> </ul>	Food & Beverage services	556	\$15.30	10.2

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
8612	Landscaping and grounds maintenance labourers	<ul style="list-style-type: none"> <li>A provincial licence to apply chemical fertilizers, fungicides, herbicides and pesticides may be required.</li> </ul>	Accommodation	500	\$15.30	4.3
6523	Airline ticket and service agents	<ul style="list-style-type: none"> <li>Several weeks of on-the-job and classroom training are provided for all occupations in this unit group.</li> <li>Airline station agents usually require experience as a ticket, baggage or cargo agent.</li> <li>Load planners require a restricted radio operator's licence and usually require airline operations experience.</li> </ul>	Transportation	500	\$23.00	11.0
5131	Producers, directors, choreographers	<ul style="list-style-type: none"> <li>Related post-secondary degree or diploma</li> <li>Extensive practical experience and training</li> </ul>	Recreation & Entertainment	472	\$42.00	13.5

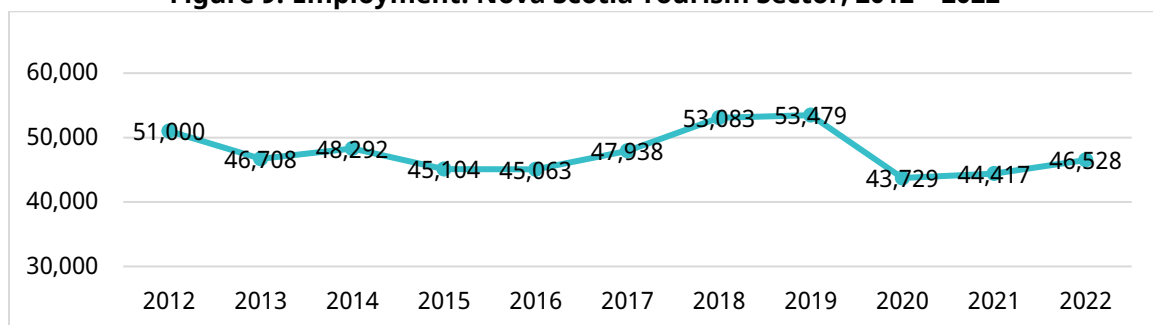
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

## 2. IMPACT OF THE PANDEMIC

### CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 0.7% from 2012 to 2019, rising from an average of 51,000 employees per month in 2012 to 53,479 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (46,528 employees per month) remain below pre-pandemic levels.

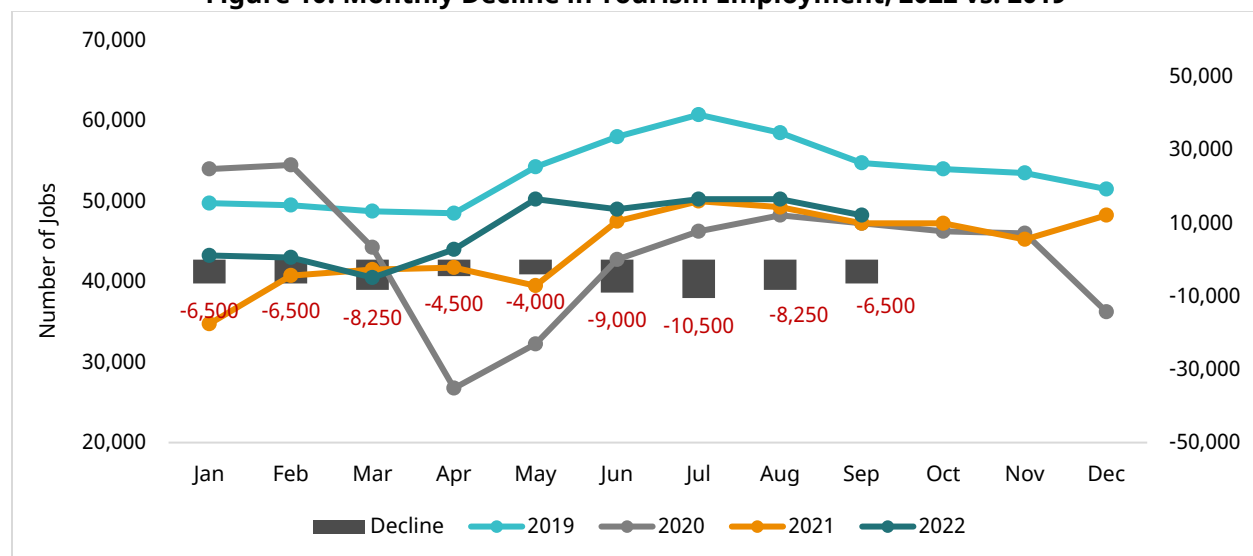
**Figure 9: Employment: Nova Scotia Tourism Sector, 2012 – 2022**



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, employment levels in 2022 still remain well below pre-pandemic levels.

**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 13% in 2022 relative to 2019, the percentage varies from growth of 15% in accommodation to losses of 24% in travel services industry.

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

Employment	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	4,500	4,500	3,750	5,167	0%	-17%	15%
Food and Beverage services	28,688	23,521	23,167	22,806	-18%	-19%	-21%
Recreation and Entertainment	11,771	8,625	8,667	10,583	-27%	-26%	-10%
Transportation	7,604	6,500	8,188	7,306	-15%	8%	-4%
Travel services	875	583	646	667	-33%	-26%	-24%
<b>Total</b>	<b>53,479</b>	<b>43,729</b>	<b>44,417</b>	<b>46,528</b>	<b>-18%</b>	<b>-17%</b>	<b>-13%</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. Seasonal and the youngest (15 to 24 years and full-time workers were the most likely to be displaced. Since 2020, the impact has become more balanced. However, less educated workers and those between the ages of 55 to 64 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
<b>Job Status</b>							
Full-time	35,292 (66%)	28,000 (64%)	29,188 (66%)	30,861 (66%)	-21%	-17%	-13%
Part-time	18,167 (34%)	15,792 (36%)	15,229 (34%)	15,667 (34%)	-13%	-16%	-14%
<b>Permanent</b>							
Permanent	36,708 (69%)	30,271 (69%)	30,833 (69%)	33,139 (71%)	-18%	-16%	-10%
Seasonal	4,833 (9%)	2,667 (6%)	2,771 (6%)	4,194 (9%)	-45%	-43%	-13%
Casual	2,979 (6%)	2,292 (5%)	3,167 (7%)	2,722 (6%)	-23%	6%	-9%
Temporary	1,667 (3%)	1,875 (4%)	1,625 (4%)	1,917 (4%)	12%	-3%	15%
<b>Gender</b>							
Male	24,854 (47%)	20,646 (47%)	21,271 (48%)	21,667 (47%)	-17%	-14%	-13%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Female	28,625 (54%)	23,125 (53%)	23,146 (52%)	24,917 (54%)	-19%	-19%	-13%
<b>Age Group</b>							
15 to 24	18,188 (34%)	13,688 (31%)	12,854 (29%)	15,806 (34%)	-25%	-29%	-13%
25 to 34	10,021 (19%)	8,063 (18%)	9,688 (22%)	9,611 (21%)	-20%	-3%	-4%
35 to 44	8,292 (16%)	7,188 (16%)	7,333 (17%)	7,444 (16%)	-13%	-12%	-10%
45 to 54	7,167 (13%)	6,417 (15%)	5,833 (13%)	6,306 (14%)	-10%	-19%	-12%
55 to 64	7,354 (14%)	5,625 (13%)	6,688 (15%)	5,139 (11%)	-24%	-9%	-30%
65 or above	2,500 (5%)	2,792 (6%)	2,063 (5%)	2,278 (5%)	12%	-17%	-9%
<b>Education</b>							
Below high school	9,188 (17%)	7,104 (16%)	7,083 (16%)	7,472 (16%)	-23%	-23%	-19%
High school or some post-secondary	20,688 (39%)	15,396 (35%)	14,958 (34%)	16,083 (35%)	-26%	-28%	-22%
Degree below bachelor's	14,417 (27%)	11,000 (25%)	13,292 (30%)	14,250 (31%)	-24%	-8%	-1%
Bachelor's degree or above	9,229 (17%)	10,333 (24%)	9,229 (21%)	8,972 (19%)	12%	0%	-3%

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 and 16 to 20 years of experience. Although workers with 1 year or less still remain below pre-pandemic levels, there is a steady increase in workers since 2021.

**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	11,125	6,417	7,000	8,833	-42%	-37%	-21%
1 year	12,521	8,229	7,875	10,361	-34%	-37%	-17%
2 to 4 years	11,917	12,917	11,979	10,833	8%	1%	-9%
5 to 7 years	4,625	4,125	5,333	4,889	-11%	15%	6%
8 to 10 years	2,750	3,063	2,875	2,833	11%	5%	3%
11 to 15 years	4,271	4,000	3,479	2,778	-6%	-19%	-35%
16 to 20 years	2,125	1,708	2,083	1,861	-20%	-2%	-12%
Over 20 years	4,146	3,354	3,750	4,111	-19%	-10%	-1%

<b>Total</b>	<b>53,479</b>	<b>43,729</b>	<b>44,417</b>	<b>46,528</b>	<b>-18%</b>	<b>-17%</b>	<b>-13%</b>
<b>Avg. years</b>	<b>6.8</b>	<b>7.2</b>	<b>7.3</b>	<b>7.2</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 16% in 2020. In 2022, the average hours worked are almost back to 2019 levels. All sectors with the exception of accommodation remain below 2019 levels.

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

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 2019	% Change 22 vs 19
Accommodation	30.8	22.5	32.0	31.2	-27%	4%	1%
Food and Beverage services	28.3	23.6	26.8	27.6	-17%	-5%	-2%
Recreation and Entertainment	28.8	27.4	27.9	27.6	-5%	-3%	-4%
Transportation	35.3	28.6	32.4	33.4	-19%	-8%	-5%
Travel services	32.0	25.0	32.0	29.0	-22%	0%	-9%
<b>Tourism Nova Scotia</b>	<b>29.6</b>	<b>24.9</b>	<b>28.7</b>	<b>28.9</b>	<b>-16%</b>	<b>-3%</b>	<b>-2%</b>

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

Overall, the average hourly wage in Nova Scotia's tourism sector increased during the pandemic. Average hourly wage increased by 15% in 2021 and by 16% in 2022 as compared to 2019. The average hourly wage increased from \$16.35 in 2019 to \$18.07 in 2020, \$18.85 in 2021 and \$18.99 in 2022.

**Table 9: Average Hourly Wage in Nova Scotia'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	\$14.83	\$16.94	\$18.90	\$18.91	14%	27%	28%
Food and Beverage services	\$13.40	\$14.67	\$14.82	\$15.48	9%	11%	16%
Recreation and Entertainment	\$17.93	\$20.45	\$21.62	\$20.92	14%	21%	17%
Transportation	\$27.00	\$29.25	\$28.00	\$29.11	8%	4%	8%
Travel services	\$19.00	\$17.50	\$30.00	\$21.00	-8%	58%	11%
<b>Tourism Nova Scotia</b>	<b>\$16.35</b>	<b>\$18.07</b>	<b>\$18.85</b>	<b>\$18.99</b>	<b>11%</b>	<b>15%</b>	<b>16%</b>

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**

The following table shows the change in employment of the leading occupations in the industry throughout the pandemic until now. Occupations in food and beverage services continue to experience a large decline in employment.

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

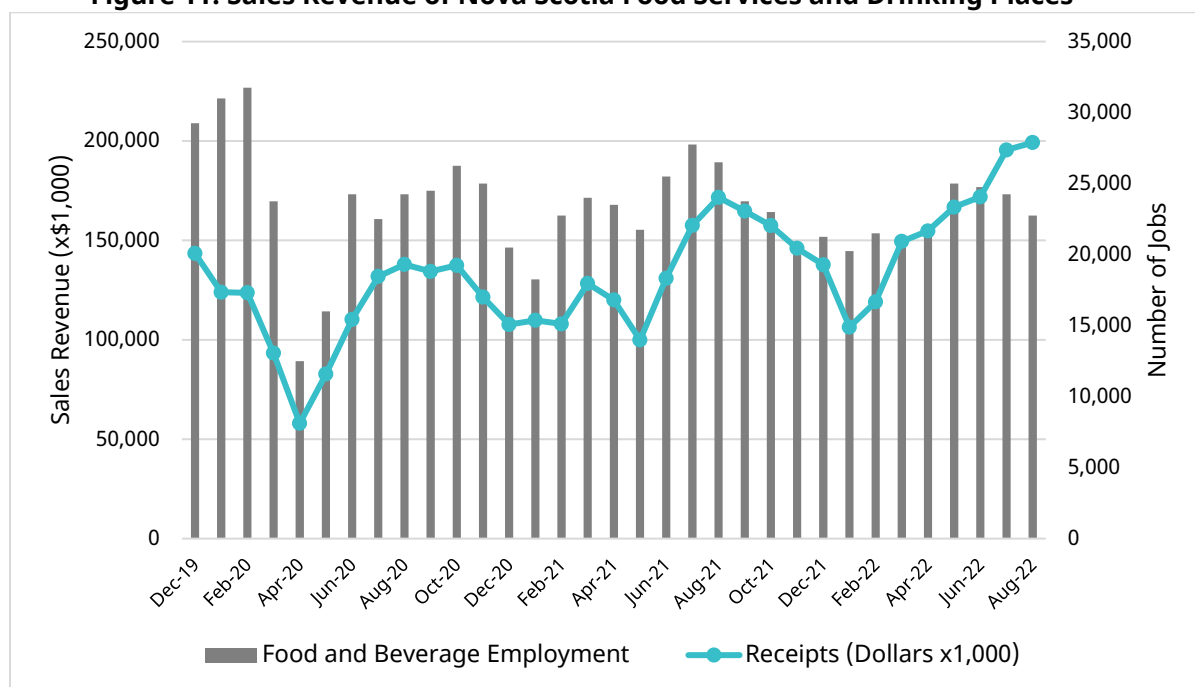
NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	8,313	5,542	5,938	7,611	-33%	-29%	-8%
6322	Cooks	5,146	3,958	5,042	4,694	-23%	-2%	-9%
6311	Food service supervisors	2,854	1,979	2,875	2,556	-31%	1%	-10%
6513	Food and beverage servers	3,917	3,021	2,250	2,444	-23%	-43%	-38%
5254	Program leaders and instructors in recreation, sport and fitness	2,042	1,354	1,354	2,167	-34%	-34%	6%
6731	Light duty cleaners	1,167	667	938	1,556	-43%	-20%	33%
6611	Cashiers	3,583	2,604	1,667	1,444	-27%	-53%	-60%
6722	Operators and attendants in amusement, recreation and sport	1,354	313	542	1,222	-77%	-60%	-10%
6512	Bartenders	417	250	458	1,222	-40%	10%	193%
0631	Restaurant and food service managers	3,146	3,313	2,000	1,194	5%	-36%	-62%
6321	Chefs	833	667	958	1,056	-20%	15%	27%
6511	Maîtres d'hôtel and hosts/hostesses	1,604	1,979	1,354	1,056	23%	-16%	-34%
7512	Bus drivers, subway operators and other transit operators	1,188	1,563	2,396	972	32%	102%	-18%
7513	Taxi and limousine drivers and chauffeurs	1,104	979	1,125	722	-11%	2%	-35%
0632	Accommodation service managers	417	1,438	917	639	245%	120%	53%
6525	Hotel front desk clerks	1,042	625	208	556	-40%	-80%	-47%
6332	Bakers	521	479	708	556	-8%	36%	7%
8612	Landscaping and grounds maintenance labourers	313	396	271	500	27%	-13%	60%
6523	Airline ticket and service agents	729	250	125	500	-66%	-83%	-31%
5131	Producers, directors, choreographers	229	500	396	472	118%	73%	106%

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

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

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

**Figure 11: Sales Revenue of Nova Scotia Food Services and Drinking Places**



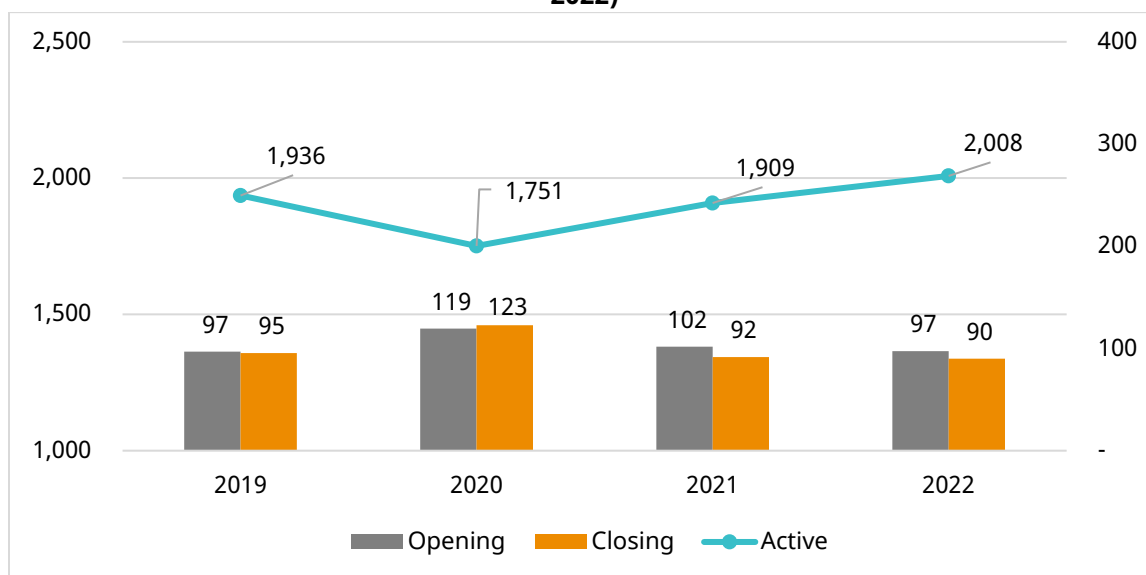
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000)

## 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 1,936 in 2019 to 1,751 in 2020 before surpassing pre-pandemic levels with 2,008 in 2022.

**Figure 12: Avg Monthly Business Opening and Closures, Nova Scotia'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 and Sector, Nova Scotia (2019-2022)**

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	4,500	4,500	3,750	5,167	-	-750	1,417
Food and Beverage services	28,688	23,521	23,167	22,806	-5,167	-354	-361
Recreation and Entertainment	11,771	8,625	8,667	10,583	-3,146	42	1,916
Transportation	7,604	6,500	8,188	7,306	-1,104	1,688	-882
Travel services	875	583	646	667	-292	63	21
<b>Sector Totals</b>	<b>53,479</b>	<b>43,729</b>	<b>44,417</b>	<b>46,528</b>	<b>-9,750</b>	<b>688</b>	<b>2,111</b>
Accommodation and food services (non-tourism)	1,646	500	979	1,472	-1,146	479	493
Administrative and support, waste management and remediation services	16,354	16,667	17,417	18,528	313	750	1,111
Agriculture, forestry, fishing and hunting	13,563	13,313	14,667	12,750	-250	1,354	-1,917
Arts, entertainment and recreation (non-tourism)	188	167	125	139	-21	-42	14
Construction	34,250	33,229	35,542	39,528	-1,021	2,313	3,986
Educational services	36,604	36,458	37,688	37,500	-146	1,229	-188
Finance and insurance	14,292	15,396	16,479	16,528	1,104	1,083	49
Health care and social assistance	72,667	71,375	74,250	77,917	-1,292	2,875	3,667
Information and cultural industries	6,313	6,333	5,188	5,528	21	-1,146	340
Manufacturing	31,688	31,563	32,625	32,583	-125	1,063	-42
Mining, quarrying, and oil and gas extraction	3,354	2,813	2,479	2,500	-542	-333	21
Other services (except public administration)	16,604	15,479	15,917	17,083	-1,125	438	1,167
Professional, scientific and technical services	27,771	29,542	34,917	39,139	1,771	5,375	4,222
Public administration	29,417	30,271	30,833	31,222	854	563	389
Real estate and rental and leasing	6,292	6,417	6,417	7,556	125	-	1,139
Retail trade	67,313	58,375	60,563	60,889	-8,938	2,188	326
Transportation and warehousing (non-tourism)	12,292	12,729	16,146	15,333	438	3,417	-813

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Utilities	3,500	3,688	4,646	4,417	188	958	-229
Wholesale trade	13,646	11,708	12,250	10,944	-1,938	542	-1,306
<b>Total Nova Scotia Employment</b>	<b>461,229</b>	<b>439,750</b>	<b>463,521</b>	<b>478,083</b>	<b>-21,479</b>	<b>23,771</b>	<b>14,563</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 sector. The results were published in July 2022. The following table summarizes their projections regarding employment in the Nova Scotia'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%. The leading industry in terms of growth is expected to be accommodation (11.6%).

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

Nova Scotia	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
<b>Tourism Sector Totals</b>	<b>44,417</b>	<b>52,050</b>	<b>54,605</b>	<b>55,534</b>	<b>56,096</b>	<b>26.3%</b>
<i>Year-over-year Growth</i>	-	17.2%	4.9%	1.7%	1.0%	6.0%
<b>Industry</b>						
Accommodation	3,750	5,314	5,683	5,753	5,812	55.0%
<i>year-over-year growth</i>	-	41.7%	6.9%	1.2%	1.0%	11.6%
Food and Beverage services	23,167	27,084	28,070	28,318	28,598	23.4%
<i>year-over-year growth</i>	-	16.9%	3.6%	0.9%	1.0%	5.4%
Recreation and Entertainment	8,667	9,562	10,217	10,414	10,599	22.3%
<i>year-over-year growth</i>	-	10.3%	6.9%	1.9%	1.8%	5.2%
Transportation	8,188	9,245	9,708	10,140	10,129	23.7%
<i>year-over-year growth</i>	-	12.9%	5.0%	4.5%	-0.1%	5.5%
Travel services	646	676	746	786	811	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*

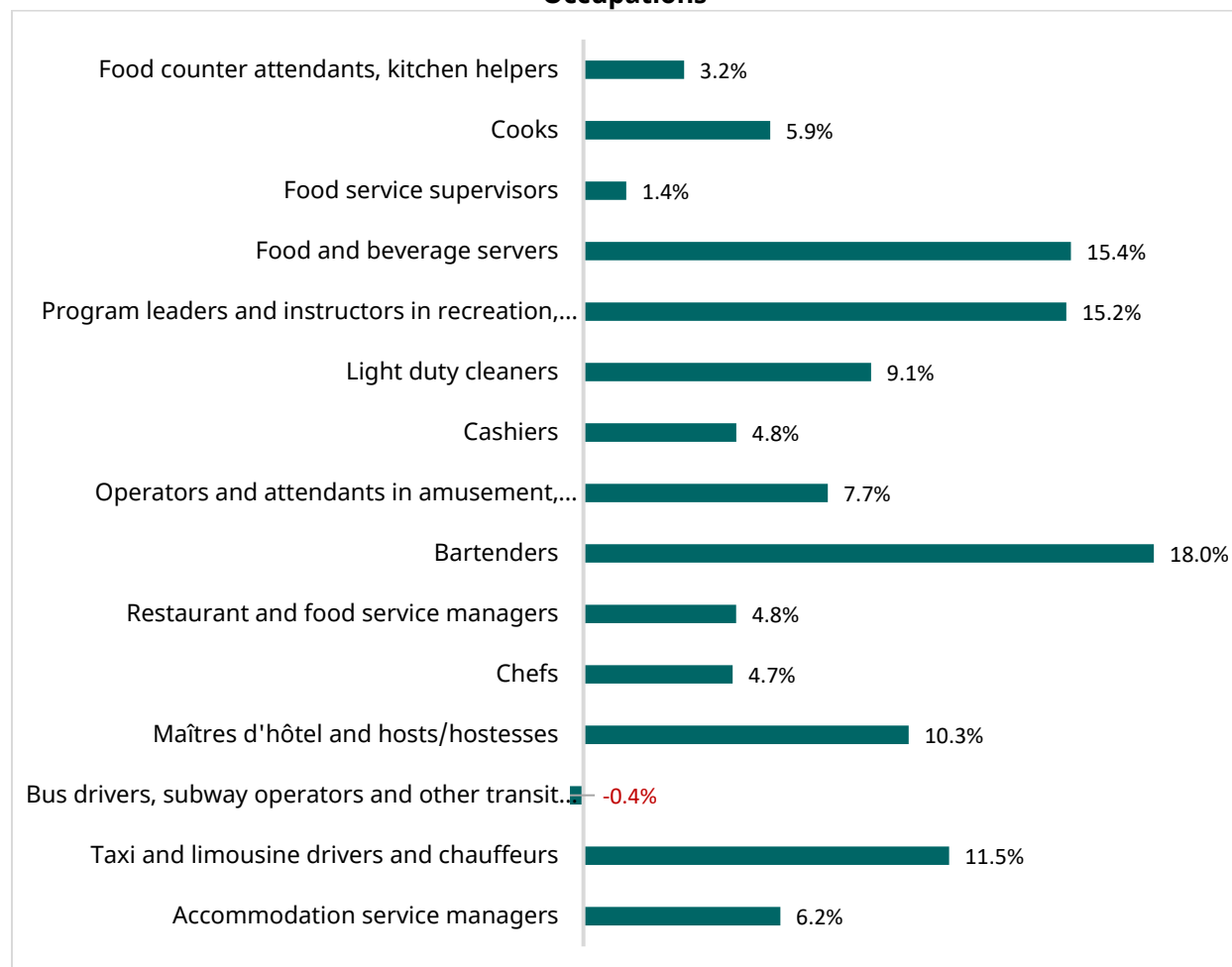
Across Canada, the Conference Board projected compounded annual employment growth in the tourism sector of 6.4% of the 4-year growth period from 2021 to 2025. This growth is consistent with the results of a recent survey conducted for Tourism HR Canada.<sup>7</sup> Of the 700 tourism employers surveyed, 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 Nova Scotia'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. The number of bus drivers, subway operators and other transit are projected to decline slightly.

**Figure 13: Nova Scotia 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>

