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SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

CATALYST
RESEARCH GROUP

Provincial Report Series: Quebec



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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 or visit tourismhr.ca.

The word "Canada" is written in a large, black, serif font. A small Canadian flag is positioned above the letter "a".

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INTRODUCTION

BACKGROUND

Prior to the COVID-19 pandemic, tourism was a significant and growing source of employment across all regions of the province. However, employment declined sharply beginning in March 2020. As evidenced in recent surveys and confirmed in the daily news, the sector is now facing significant staff shortages as we emerge from the pandemic. Many employees left for other sectors or left the workforce altogether, and the sector has faced strong competition in attracting new workers.

There is continued uncertainty regarding future labour market demand and skills requirements for the sector. Requirements could vary widely depending on factors such as the potential waves of COVID-19, the continuing strength of pent-up demand for travel, on-going changes in the characteristics of markets, business practices and technology, environmental considerations, the labour market supply, and 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 Quebec, 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 Quebec'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 Quebec'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 QUEBEC TOURISM INDUSTRY

Quebec's tourism sector is comprised of companies which provide accommodation, food and beverage, recreation and entertainment, transportation and travel services. Quebec is the only French-speaking province in Canada. Given its uniqueness, it is the third most visited province in Canada.¹ Quebec is a leading destination for visitors interested in art, music and fine dining. Quebec's long, snowy winters are an iconic symbol of the province, and the massive outdoor Carnaval du Quebec in Quebec City, featuring skating, dog-sledding, ice-sculpting, and tobogganing is one of the highlights of the year.²

The main areas that are visited in Quebec are Montreal, Quebec City (UNESCO World Heritage Site), Mount-Tremblant and the St. Lawrence River.³ Tourists enjoy skiing, shopping, international festivals, hunting and fishing and outdoor activities.⁴ Half of Québec is covered in woodland and the province is dotted with 3 million lakes and more than 200 areas are protected by parks and wildlife reserves.⁵ The COVID-19 pandemic significantly affected the tourism sector in Quebec. However, in June of 2020, the Quebec government announced it will invest \$750 million into the provincial tourism sector to help boost it.⁶

¹ <https://www.worldatlas.com/articles/the-most-visited-canadian-provinces-and-territories.html>

² <https://thecanadaguide.com/places/quebec/>

³ <https://thecanadaguide.com/places/canadian-tourism/quebec-tourism/>

⁴ <https://www.bonjourquebec.com/en-ca/explore/experiences/outdoor-adventures>

⁵ <https://www.bonjourquebec.com/en-ca/where-to-go/national-parks>

⁶ <https://globalnews.ca/news/7055929/quebec-government-funding-tourism-industry-coronavirus/>

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

Quebec's tourism sector employed an average of 380,556 employees through the first nine months of 2022, of whom 41% were employed in food and beverage services and 29% in recreation and entertainment, 21% in transportation, 6% in accommodation and 2% in the travel services sector.

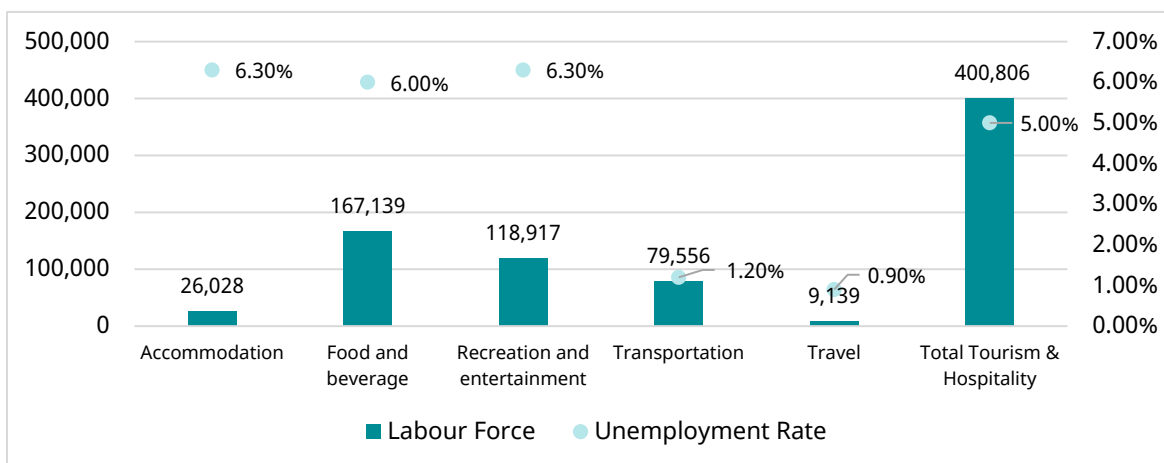
Table 1: Employment in the Quebec's Tourism Industry and Sector, 2022

Industry	Quebec	
	#	%
Accommodation	24,361	6%
Food and beverage services	157,083	41%
Recreation and entertainment	111,389	29%
Transportation	78,611	21%
Travel services	9,111	2%
Tourism Sector Total	380,556	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 400,806 through the first nine months of 2022. Unemployment averaged 5%.

Figure 1: Total Labour Force and Unemployment Rate, Quebec 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 defines food and beverage and travel industries as Food and Beverage "services" industry and Travel "services" industry.

The Quebec tourism sector accounts for approximately 8.7% of the total employment in Quebec, slightly less than the national tourism industry average of 9.5%.

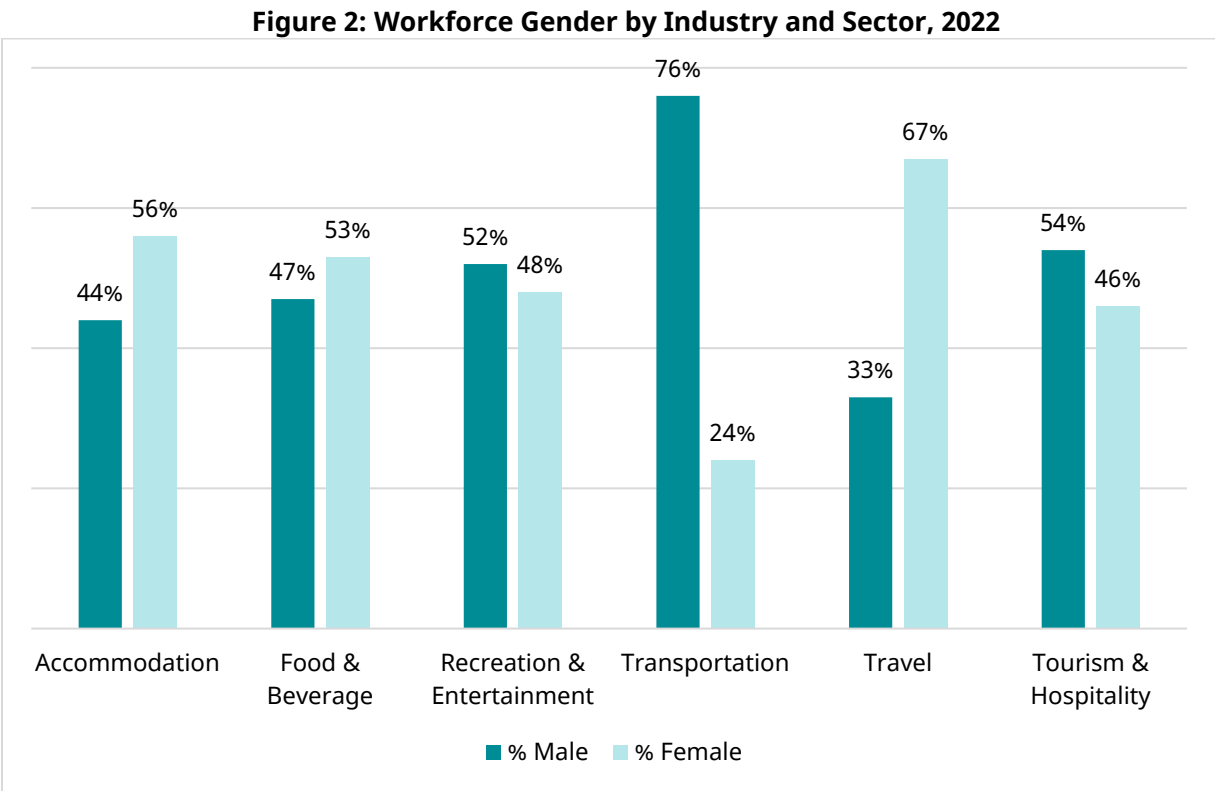
Table 2: Quebec Tourism Sector vs Total Employment, 2022

Employment	Quebec	Canada
Tourism	380,583	1,859,806
Overall Employment	4,364,667	19,523,917
Percent Tourism of Overall Employment	8.7%	9.5%

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

DEMOGRAPHIC CHARACTERISTICS

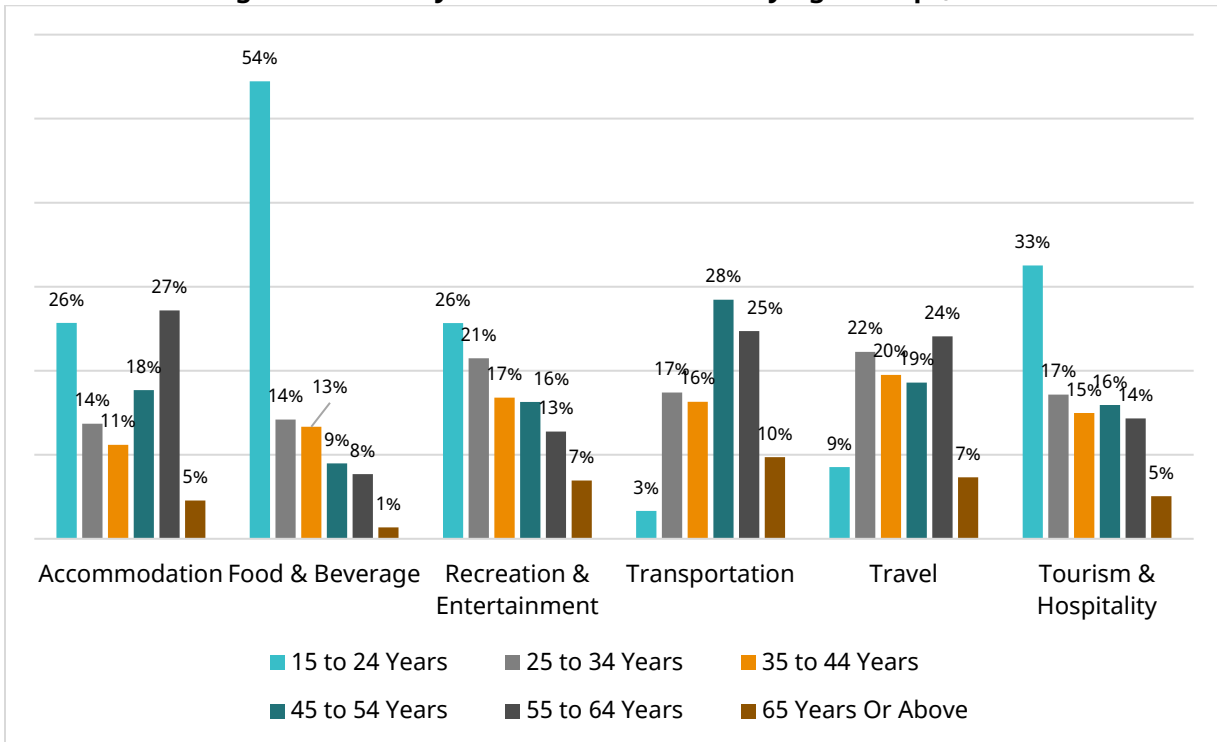
The workforce is relatively evenly divided in terms of gender. The transportation industry has the highest concentration of male workers (76%) while the travel services industry has the highest concentration of female workers (67%).



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 is the oldest with 35% of its workers being 55 years or older. Half of the workforce is under the age of 35.

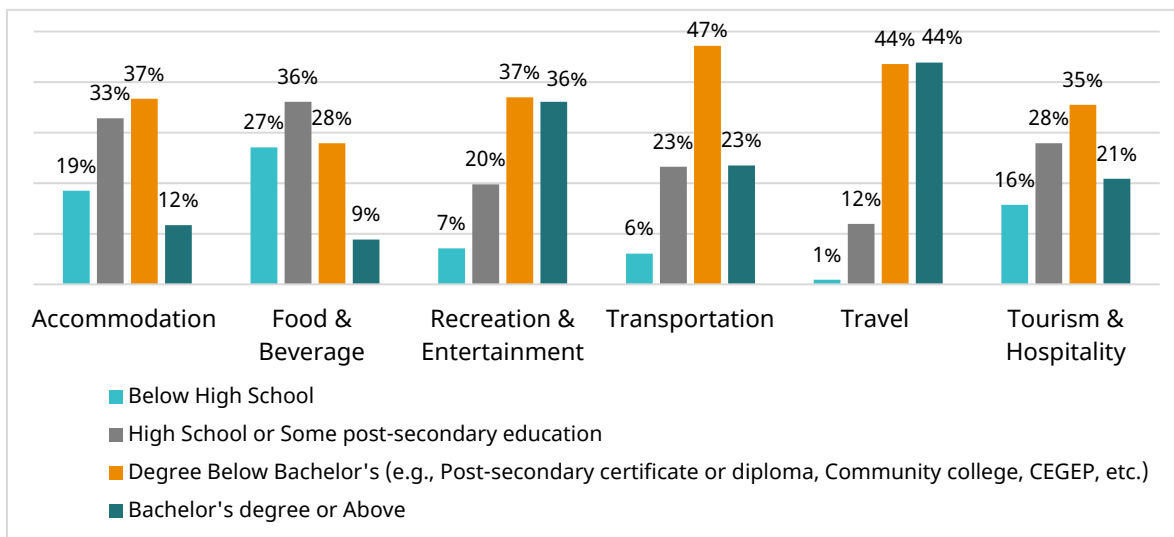
Figure 3: Industry and Sector Workforce by Age Groups, 2022



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

Over half (56%) 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).

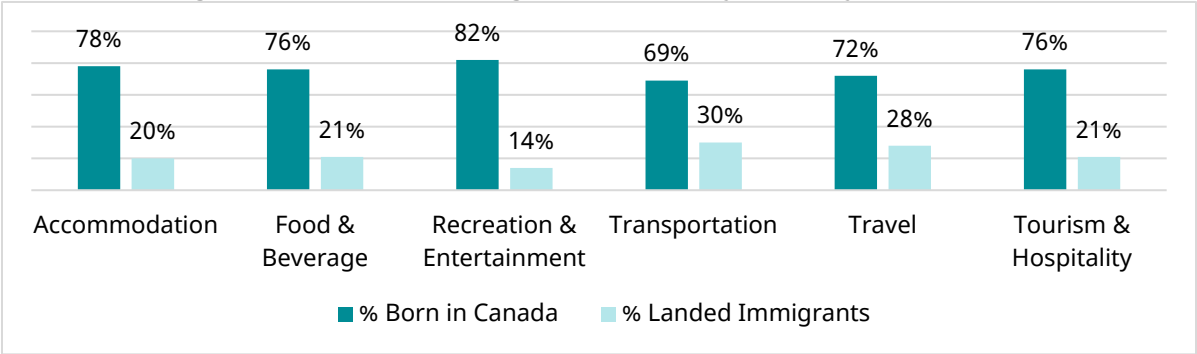
Figure 4: Workforce Education Level by Industry and Sector, 2022



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

In 2022, 76% of the tourism sector workforce were born in Canada, whereas 21% are landed immigrants. The majority of the workforce who were born in Canada work in the recreation and entertainment industry while the majority of landed immigrants work in the transportation industry.

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

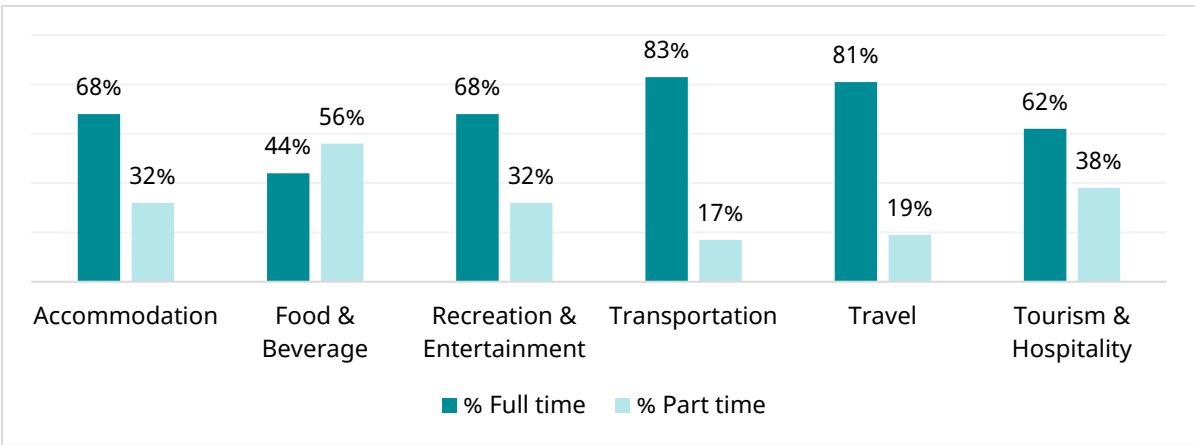


Source: THRC Employment Tracker, LFS Statistics Canada.

EMPLOYMENT STATUS AND WAGES

Approximately 62% of the provincial workforce is employed on a full-time basis and 38% is employed part-time. The transportation industry has the highest percentage of full-time workers (83%) while the food and beverage services industry has the highest percentage of part-time workers (56%).

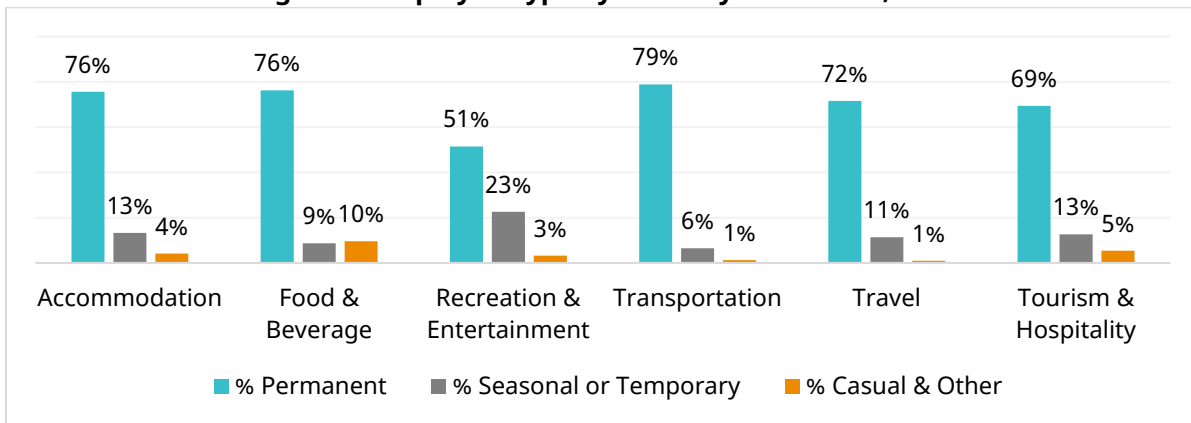
Figure 6: Job Status by Industry and Sector, 2022



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

Permanent workers account for 69% of the workforce, while 18% are seasonal, temporary, or casual workers (the remaining 13% of the workers have an unknown status in the Labour Force Survey). The transportation industry has the highest percentage of permanent employees (79%), whereas the recreation and entertainment industry has the highest percentage of seasonal employees (23%).

Figure 7: Employee Type by Industry and Sector, 2022

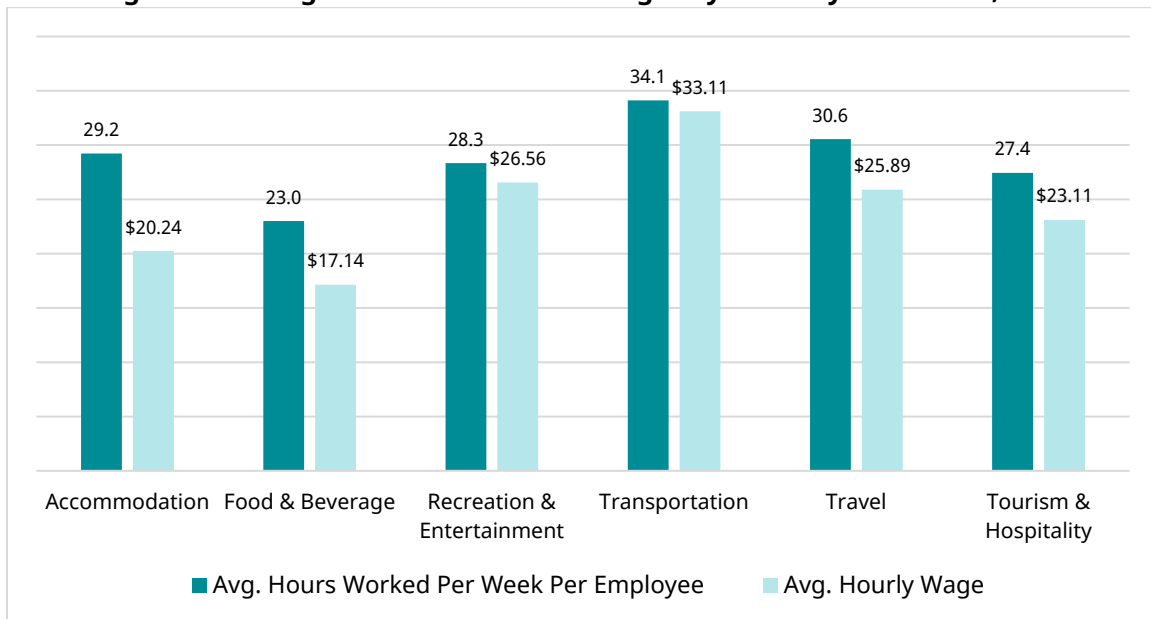


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

*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 \$23.11 per hour and the average hours worked per week is 27.4. Employees in the transportation industry work the most hours per week (of 34.1 hours per employee) and are paid the highest average hourly wage (\$33.11 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 Quebec tourism sector workforce have been employed in their current positions for seven years. The travel services industry has the longest average length of employment of 11.3 years, while food and beverage services industry had the shortest average length of employment of 4.5 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	4,861	20%	32,167	20%	16,667	15%	5,083	6%	1,250	14%	60,083	16%
1 to 2	5,194	21%	43,528	28%	21,083	19%	10,944	14%	639	7%	81,444	21%
2 to 4	3,944	16%	45,222	29%	24,528	22%	19,528	25%	2,194	24%	95,417	25%
5 to 7	3,389	14%	16,361	10%	12,472	11%	10,694	14%	1,194	13%	44,111	12%
8 to 10	1,861	8%	7,222	5%	7,444	7%	4,667	6%	1,000	11%	22,250	6%
11 to 15	1,694	7%	6,167	4%	9,056	8%	12,528	16%	306	3%	29,750	8%
16 to 20	1,028	4%	2,556	2%	7,472	7%	5,222	7%	500	6%	16,778	4%
Over 20	2,417	10%	3,861	2%	12,667	11%	9,944	13%	2,000	22%	30,944	8%
Total	24,361	100%	157,083	100%	111,389	100%	78,611	100%	9,111	100%	380,556	100%
Avg. Length	7.8 years		4.5 years		8.8 years		10.1 years		11.3 years		7.3 years	

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 industry accounts for the occupations that have the highest average experience levels.

Table 4: Leading Occupations in Quebec'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	47,972	\$15.30	3.0
6322	Cooks	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	29,111	\$16.70	4.9
6513	Food and beverage servers	<ul style="list-style-type: none"> Completion of a three-year apprenticeship program for cooks or completion of college or other program in cooking or food safety 	Food & Beverage services	24,917	\$19.40	4.4
7512	Bus drivers, subway operators and other transit operators	<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 	Transportation	22,750	\$24.00	10.1
6611	Cashiers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	16,528	\$15.50	3.4
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	14,583	\$17.60	4.6
0631	Restaurant and food service managers	<ul style="list-style-type: none"> Completion of a college or other program related to hospitality or food and beverage service management Several years of experience in the food service sector including supervisory experience Responsible beverage service certification 	Food & Beverage services	12,667	\$25.00	8.4
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	11,917	\$17.90	8.6
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	9,917	\$18.20	6.6
6722	Operators and attendants in amusement, recreation, and sport	<ul style="list-style-type: none"> On-the-job training 	Recreation & Entertainment	9,333	\$17.60	4.8
5131	Producers, directors, choreographers	<ul style="list-style-type: none"> Related post-secondary degree or diploma Extensive practical experience and training 	Recreation & Entertainment	8,972	\$38.00	9.7
6731	Light duty cleaners	<ul style="list-style-type: none"> On-the-job training 	Accommodation	8,667	\$18.90	8.0

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
		<ul style="list-style-type: none"> ▪ Certification for housekeeping room attendants or similar certification 				
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	7,250	\$21.00	6.6
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> ▪ On the job training 	Food & Beverage services	5,944	\$20.00	3.8
5241	Graphic designers and illustrators	<ul style="list-style-type: none"> ▪ A university degree in visual arts with specialization in graphic design, commercial art, graphic communications or cartooning or completion of a college diploma program in graphic arts ▪ Experience or training in multimedia design at a post-secondary, college, or technical institution 	Recreation & Entertainment	3,583	\$35.00	6.8
6733	Janitors, caretakers and building superintendents	<ul style="list-style-type: none"> ▪ Some occupations in this unit group require previous cleaning and maintenance experience. ▪ A journeyman/woman certificate in one or more of the trades or a building operator certificate may be required for building superintendents. 	Accommodation	3,111	\$21.00	8.8
0731	Managers in transportation	<p>Managers in transportation operations</p> <ul style="list-style-type: none"> ▪ A bachelor's degree in business administration or engineering is usually required. ▪ Several years of experience in transportation operations are usually required, including supervisory experience. ▪ 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. ▪ Certification as an operator of a particular mode of transportation, such as commercial pilot, vessel master or truck driver, is usually required. <p>Managers in transportation freight traffic</p> <ul style="list-style-type: none"> ▪ A college diploma or university degree in business or transportation administration may be required. ▪ Several years of clerical, operational or administrative experience related to freight traffic are required. 	Transportation	3,028	\$51.00	11.0

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
0632	Accommodation service managers	<ul style="list-style-type: none"> A university degree or college diploma in hotel management or other related discipline or equivalent job experience 	Accommodation	3,000	\$33.00	16.7
6525	Hotel front desk clerks	<ul style="list-style-type: none"> Completion of a two-year apprenticeship program, or a college program in front desk operations or hotel management Guest services representative trade certification 	Accommodation	2,806	\$17.30	4.5
2271	Air pilots, flight engineers and flying instructors	<p>Pilots and flight engineers</p> <ul style="list-style-type: none"> Completion of secondary school and graduation from a certified flying or aviation school are required. 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"> Completion of secondary school and graduation from a certified flying or aviation school are required. 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	2,806	\$52.00	14.3

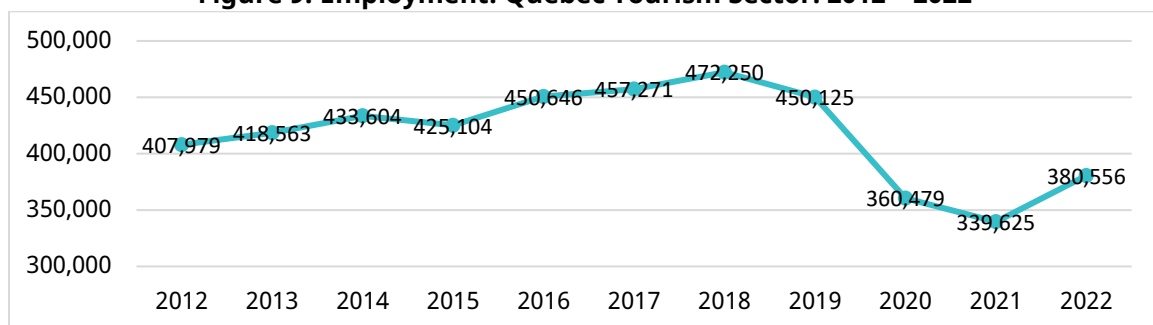
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

2. IMPACT OF THE PANDEMIC

CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 1.4% from 2012 to 2019, rising from an average of 407,979 employees per month in 2012 to 450,125 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (380,556 employees per month) remain below pre-pandemic levels.

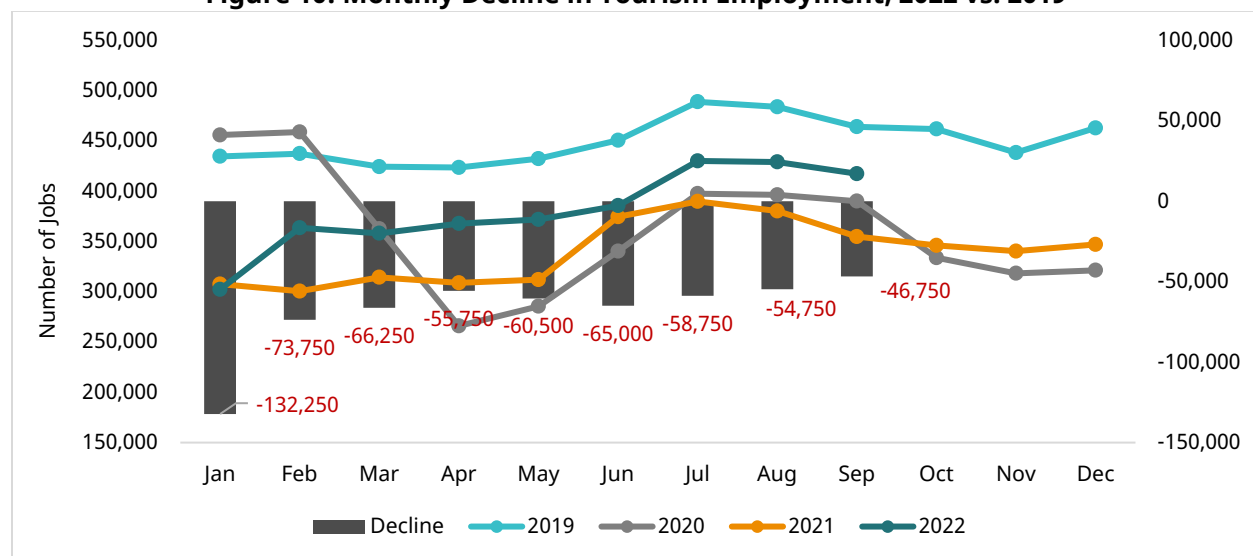
Figure 9: Employment: Quebec Tourism Sector. 2012 – 2022



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. Overall, employment in the sector is down 15% in 2022 relative to 2019.

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	38,313	25,563	20,250	24,361	-33%	-47%	-36%
Food and Beverage services	206,167	155,333	155,146	157,083	-25%	-25%	-24%
Recreation and Entertainment	114,438	91,771	87,042	111,389	-20%	-24%	-3%
Transportation	81,833	77,917	69,604	78,611	-5%	-15%	-4%
Travel services	9,375	9,896	7,583	9,111	6%	-19%	-3%
Total	450,125	360,479	339,625	380,556	-20%	-25%	-15%

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 those with a below high school level education 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 temporary and casual workers and workers aged 25 to 34 and 35 to 44 currently 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	280,438 (62%)	228,083 (63%)	205,604 (61%)	234,444 (62%)	-19%	-27%	-16%
Part-time	169,729 (38%)	132,375 (37%)	134,000 (39%)	146,139 (38%)	-22%	-21%	-14%
Permanent							
Permanent	303,458 (67%)	245,542 (68%)	220,917 (65%)	264,056 (69%)	-19%	-27%	-13%
Seasonal	28,938 (6%)	18,083 (5%)	22,208 (7%)	25,500 (7%)	-38%	-23%	-12%
Casual	22,188 (5%)	17,292 (5%)	19,021 (6%)	17,000 (4%)	-22%	-14%	-23%
Temporary	31,188 (7%)	22,792 (6%)	23,479 (7%)	22,611 (6%)	-27%	-25%	-28%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Gender							
Male	238,188 (53%)	190,167 (53%)	184,979 (54%)	204,083 (54%)	-20%	-22%	-14%
Female	211,979 (47%)	170,313 (47%)	154,625 (46%)	176,556 (46%)	-20%	-27%	-17%
Age Group							
15 to 24	144,354 (32%)	104,417 (29%)	102,625 (30%)	123,806 (33%)	-28%	-29%	-14%
25 to 34	88,771 (20%)	62,229 (17%)	63,479 (19%)	65,306 (17%)	-30%	-28%	-26%
35 to 44	78,042 (17%)	58,792 (16%)	49,646 (15%)	56,972 (15%)	-25%	-36%	-27%
45 to 54	70,000 (16%)	59,438 (16%)	53,417 (16%)	60,639 (16%)	-15%	-24%	-13%
55 to 64	52,979 (12%)	58,854 (16%)	53,250 (16%)	54,556 (14%)	11%	1%	3%
65 or above	16,083 (4%)	16,708 (5%)	17,188 (5%)	19,278 (5%)	4%	7%	20%
Education							
Below high school	70,854 (16%)	51,938 (14%)	50,250 (15%)	59,889 (16%)	-27%	-29%	-15%
High school or some post-secondary	125,188 (28%)	96,938 (27%)	88,188 (26%)	106,167 (28%)	-23%	-30%	-15%
Degree below bachelor's	162,646 (36%)	128,750 (36%)	120,417 (35%)	135,056 (35%)	-21%	-26%	-17%
Bachelor's degree or above	91,417 (20%)	82,833 (23%)	80,729 (24%)	79,472 (21%)	-9%	-12%	-13%

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

These patterns are also reflected in the number of years people have worked in the industry. The loss of experienced workers is evident in the decline in workers with 11 to 15 and 16 to 20 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 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	90,438	47,167	70,375	60,083	-48%	-22%	-34%
1 year	94,854	69,792	47,417	81,444	-26%	-50%	-14%
2 to 4 years	99,417	97,458	91,083	95,417	-2%	-8%	-4%

Length of Employment	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
5 to 7 years	38,333	38,750	37,604	44,111	1%	-2%	15%
8 to 10 years	27,333	27,917	22,208	22,250	2%	-19%	-19%
11 to 15 years	41,042	25,688	25,604	29,750	-37%	-38%	-28%
16 to 20 years	25,958	16,667	17,875	16,778	-36%	-31%	-35%
Over 20 years	32,771	37,021	27,458	30,944	13%	-16%	-6%
Total	450,125	360,479	339,625	380,556	-20%	-25%	-15%
Avg. years	7.2	8.1	7.4	7.3	-	-	-

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 13% in 2020. In 2022, the average hours worked are almost back to 2019 levels. The recreation and entertainment as well as the transportation industries experienced an increase in average hours per week relative to 2019.

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

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Accommodation	31.1	25.1	28.1	29.2	-19%	-10%	-6%
Food and Beverage services	25.3	21.5	23.3	23.0	-15%	-8%	-9%
Recreation and Entertainment	27.6	24.0	28.1	28.3	-13%	2%	3%
Transportation	32.6	28.8	32.0	34.1	-12%	-2%	5%
Travel services	31.6	29.3	27.7	30.6	-7%	-12%	-3%
Tourism Quebec	28.0	24.3	26.8	27.4	-13%	-4%	-2%

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

Overall, the average hourly wage in Quebec's tourism sector increased during the pandemic. Average hourly wage increased by 8% in 2021 and by 14% in 2022 as compared to 2019. The average hourly wage increased from \$20.21 in 2019 to \$23.11 in 2022.

Table 9: Average Hourly Wage in Quebec'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	\$19.33	\$20.15	\$20.15	\$20.24	4%	4%	5%
Food and Beverage services	\$15.60	\$16.06	\$16.51	\$17.14	3%	6%	10%
Recreation and	\$22.13	\$25.67	\$25.67	\$26.56	16%	16%	20%

	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Entertainment							
Transportation	\$29.58	\$28.92	\$31.50	\$33.11	-2%	6%	12%
Travel services	\$28.92	\$23.92	\$25.19	\$25.89	-17%	-13%	-10%
Tourism Quebec	\$20.21	\$21.38	\$21.83	\$23.11	6%	8%	14%

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

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

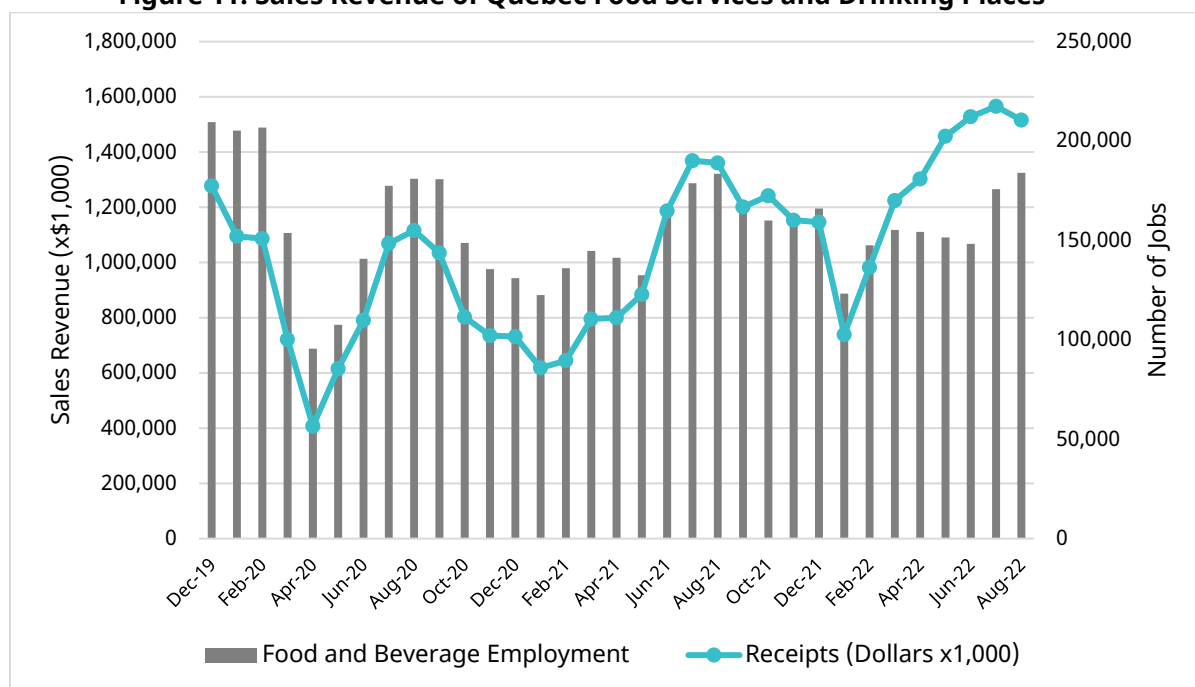
NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	50,021	47,000	44,292	47,972	-6%	-11%	-4%
6322	Cooks	41,271	28,354	27,833	29,111	-31%	-33%	-29%
6513	Food and beverage servers	43,979	21,500	16,063	24,917	-51%	-63%	-43%
7512	Bus drivers, subway operators and other transit operators	18,333	18,813	25,833	22,750	3%	41%	24%
6611	Cashiers	18,250	14,104	13,688	16,528	-23%	-25%	-9%
5254	Program leaders and instructors in recreation, sport, and fitness	21,125	14,708	12,313	14,583	-30%	-42%	-31%
0631	Restaurant and food service managers	23,750	17,021	17,771	12,667	-28%	-25%	-47%
7513	Taxi and limousine drivers and chauffeurs	11,042	11,292	10,833	11,917	2%	-2%	8%
6311	Food service supervisors	11,167	9,083	9,813	9,917	-19%	-12%	-11%
6722	Operators and attendants in amusement, recreation, and sport	11,729	5,813	9,271	9,333	-50%	-21%	-20%
5131	Producers, directors, choreographers	6,104	6,542	9,063	8,972	7%	48%	47%
6731	Light duty cleaners	10,729	6,833	5,438	8,667	-36%	-49%	-19%
6321	Chefs	7,042	5,333	6,542	7,250	-24%	-7%	3%
6511	Maîtres d'hôtel and hosts/hostesses	6,688	6,250	6,688	5,944	-7%	0%	-11%
5241	Graphic designers and illustrators	1,792	1,354	2,167	3,583	-24%	21%	100%
6733	Janitors, caretakers and building superintendents	1,833	2,250	2,083	3,111	23%	14%	70%
0731	Managers in transportation	1,458	2,521	1,250	3,028	73%	-14%	108%
0632	Accommodation service managers	4,563	4,250	2,354	3,000	-7%	-48%	-34%
6525	Hotel front desk clerks	4,417	4,021	5,417	2,806	-9%	23%	-36%
2271	Air pilots, flight engineers and flying instructors	1,438	604	1,188	2,806	-58%	-17%	95%

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 April 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 Quebec Food Services and Drinking Places



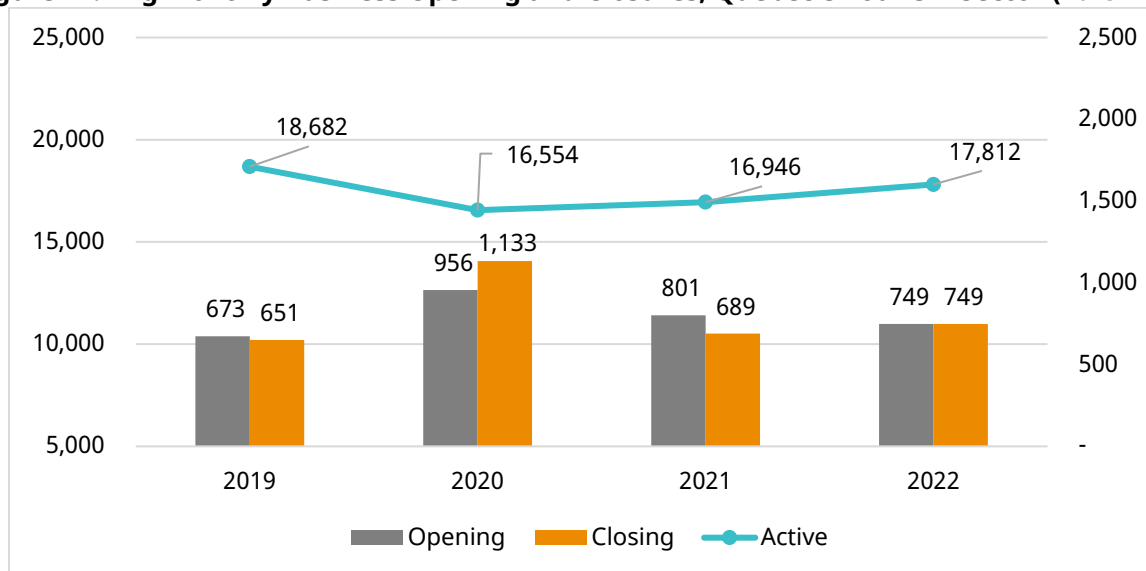
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01
Monthly survey of food services and drinking places (x 1,000)

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 18,682 in 2019 to 16,554 in 2020 before climbing up to 17,812 in 2022.

Figure 12: Avg Monthly Business Opening and Closures, Quebec'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.⁷ 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.

⁷ 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, Quebec (2019-2022)

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	38,313	25,563	20,250	24,361	-12,750	-5,313	4,111
Food and Beverage services	206,167	155,333	155,146	157,083	-50,834	-187	1,937
Recreation and Entertainment	114,438	91,771	87,042	111,389	-22,667	-4,729	24,347
Transportation	81,833	77,917	69,604	78,611	-3,916	-8,313	9,007
Travel services	9,375	9,896	7,583	9,111	521	-2,313	1,528
Sector Totals	450,125	360,479	339,625	380,556	-89,646	-20,854	40,931
Accommodation and food services (non-tourism)	9,875	9,625	8,750	8,444	-250	-875	-306
Administrative and support, waste management and remediation services	168,438	151,104	154,042	157,833	-17,333	2,938	3,792
Agriculture, forestry, fishing and hunting	70,604	70,500	72,833	70,222	-104	2,333	-2,611
Arts, entertainment and recreation (non-tourism)	2,896	2,021	3,104	1,056	-875	1,083	-2,049
Construction	266,583	255,958	287,000	290,278	-10,625	31,042	3,278
Educational services	300,208	312,771	354,979	343,972	12,563	42,208	-11,007
Finance and insurance	180,771	193,375	213,896	213,139	12,604	20,521	-757
Health care and social assistance	606,438	590,979	596,625	605,278	-15,458	5,646	8,653
Information and cultural industries	55,354	64,646	63,438	68,750	9,292	-1,208	5,313
Manufacturing	497,271	474,021	482,583	496,000	-23,250	8,563	13,417
Mining, quarrying, and oil and gas extraction	25,979	22,125	22,833	31,694	-3,854	708	8,861
Other services (except public administration)	180,354	151,042	155,063	161,333	-29,313	4,021	6,271
Professional, scientific and technical services	346,021	341,375	365,646	378,528	-4,646	24,271	12,882
Public administration	248,917	236,479	257,333	273,278	-12,438	20,854	15,944
Real estate and rental and leasing	55,208	51,438	60,396	55,667	-3,771	8,958	-4,729
Retail trade	522,625	497,958	493,688	499,139	-24,667	-4,271	5,451
Transportation and warehousing (non-tourism)	160,313	150,833	160,292	153,611	-9,479	9,458	-6,681

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Utilities	25,333	24,250	27,396	28,583	-1,083	3,146	1,188
Wholesale trade	134,813	138,688	149,604	147,222	3,875	10,917	-2,382
Total Quebec Employment	4,308,083	4,099,625	4,269,042	4,364,667	-208,458	169,417	95,625

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 Quebec'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 6.8%. The leading industry in terms of growth is expected to be accommodation (17.4%) and food and beverage services (7.3%).

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

Quebec	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
Tourism Sector Totals	339,625	412,200	432,209	438,400	442,472	30%
<i>Year-over-year Growth</i>	-	21.4%	4.9%	1.4%	0.9%	6.8%
Industry						
Accommodation	20,250	35,528	37,854	38,153	38,413	89.7%
<i>year-over-year growth</i>	-	75.4%	6.5%	0.8%	0.7%	17.4%
Food and Beverage services	155,146	194,428	202,285	203,968	205,583	32.5%
<i>year-over-year growth</i>	-	25.3%	4.0%	0.8%	0.8%	7.3%
Recreation and Entertainment	87,042	99,765	105,963	107,592	109,092	25.3%
<i>year-over-year growth</i>	-	14.6%	6.2%	1.5%	1.4%	5.8%
Transportation	69,604	74,790	77,681	79,862	80,327	15.4%
<i>year-over-year growth</i>	-	7.5%	3.9%	2.8%	0.6%	3.6%
Travel services	7,583	7,689	8,427	8,825	9,057	19.4%
<i>year-over-year growth</i>	-	1.4%	9.6%	4.7%	2.6%	4.5%

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

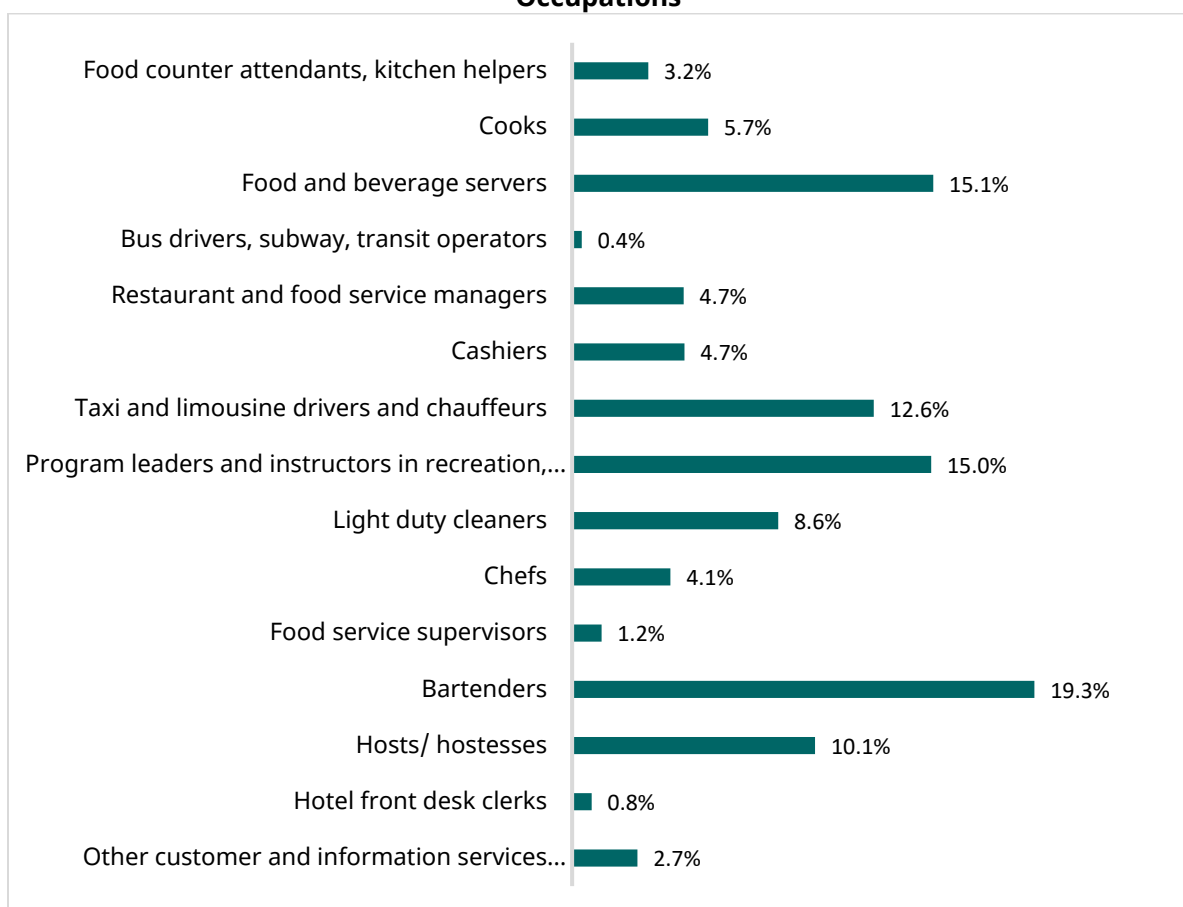
Across Canada, the Conference Board projected compounded annual employment growth in the tourism sector of 6.4% of the 4-year growth period from 2021 to 2025. This growth is consistent with the results of a recent survey conducted for Tourism HR Canada.⁸ Of the 700 tourism employers surveyed, 29% are 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).

⁸ 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 Quebec's tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be bartenders.

Figure 13: Quebec Tourism Projected 5-year compounded annual growth rates by Top 15 Occupations⁹



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

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

