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SNAPSHOT OF THE TOURISM SECTOR LABOUR MARKET

QATALYST
RESEARCH GROUP

Provincial Report Series: Saskatchewan



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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" in a serif font, with a small Canadian flag (red maple leaf) 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, 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 Saskatchewan, 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 Saskatchewan'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 Saskatchewan's tourism sector and leading occupations. A summary of major business challenges facing employers is also included.

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 SASKATCHEWAN TOURISM SECTOR

Saskatchewan's tourism sector is comprised of companies which provide accommodation, food and beverage services, recreation and entertainment, transportation and travel services. Tourism attractions in the province include parks which provide outdoor recreational experiences, museums, galleries, cultural festivals and experiences, agricultural exhibitions, craft fairs, and fall suppers. Other attractions provide paleontological, mineral spa and casino gaming experiences. There are also a number of golf courses in Saskatchewan known internationally.¹ Tourism is an important element of the province's economy as it generates over \$2 billion in travel spending annually. There are more than 12 million visits made to and within the province each year.²

Pre-pandemic, tourism spending in Saskatchewan reached \$2.17 billion in 2019. There were approximately 12 million visits made to and within the province that year. Tourism-related employment made up 12% of Saskatchewan's total labour force. The COVID-19 pandemic posed unprecedented challenges to the tourism sector. In 2020, visitor spending had decreased to \$1.5 billion and there were 50,000 people employed in the tourism industry. Since 2020, Saskatchewan has been recovering steadily. Tourism expenditures grew to \$1.7 billion in 2021 with 57,200 employed in the industry. Hotel occupancy rates rose from 32% in 2020 to 41% in 2021.³

On August 15, 2022, the Minister of Tourism announced more than \$3.7 million to support tourism offerings and infrastructure in Saskatchewan. This funding will support art galleries, museums, festivals and unique outdoor experiences that will provide visitors from across Canada and abroad with opportunities to enjoy Saskatchewan's distinct landscape and rich culture.⁴

¹ <https://business.tourismsaskatchewan.com/en/community-tourism-planning/tourism-in-saskatchewan>

² Ibid.

³ Ibid.

⁴ <https://www.canada.ca/en/prairies-economic-development/news/2022/08/minister-boissonnault-announces-investments-in-saskatchewan-tourism-experiences.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

Saskatchewan's tourism sector employed an average of 53,194 employees through the first nine months of 2022, of whom 50% were employed in food and beverage services and 25% in recreation and entertainment, 12% in transportation and accommodation, and 1% in the travel services industry.

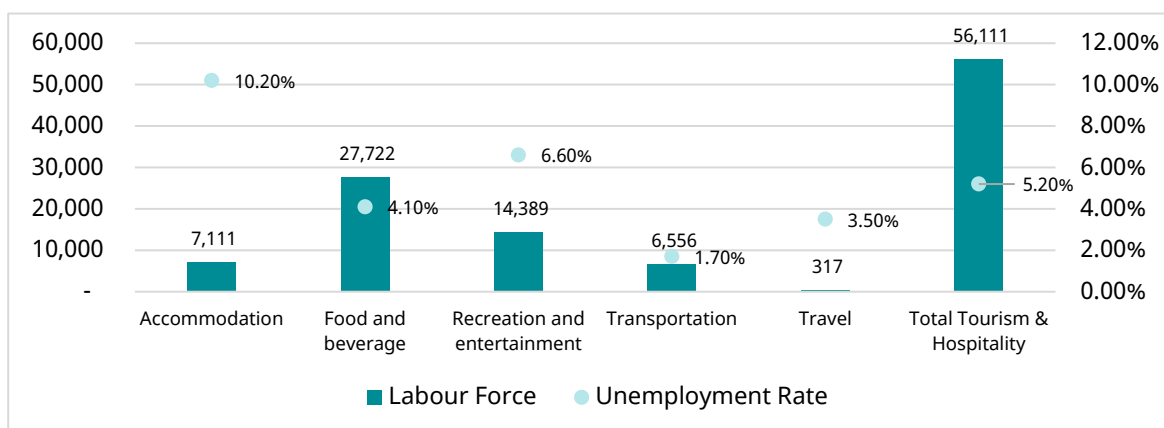
Table 1: Employment in the Saskatchewan Tourism Industry and Sector, 2022

Industry	Saskatchewan	
	#	%
Accommodation	6,417	12%
Food and beverage services	26,556	50%
Recreation and entertainment	13,472	25%
Transportation	6,444	12%
Travel services	306	1%
Tourism Sector Total	53,194	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 56,111 through the first nine months of 2022. Unemployment averaged 5.2 %.

Figure 1: Total Labour Force and Unemployment Rate, Saskatchewan 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 Saskatchewan tourism sector accounts for 9.2% of the total employment in Saskatchewan, slightly less than the national tourism industry average of 9.5%.

Table 2: Saskatchewan Tourism Sector vs Total Employment, 2022

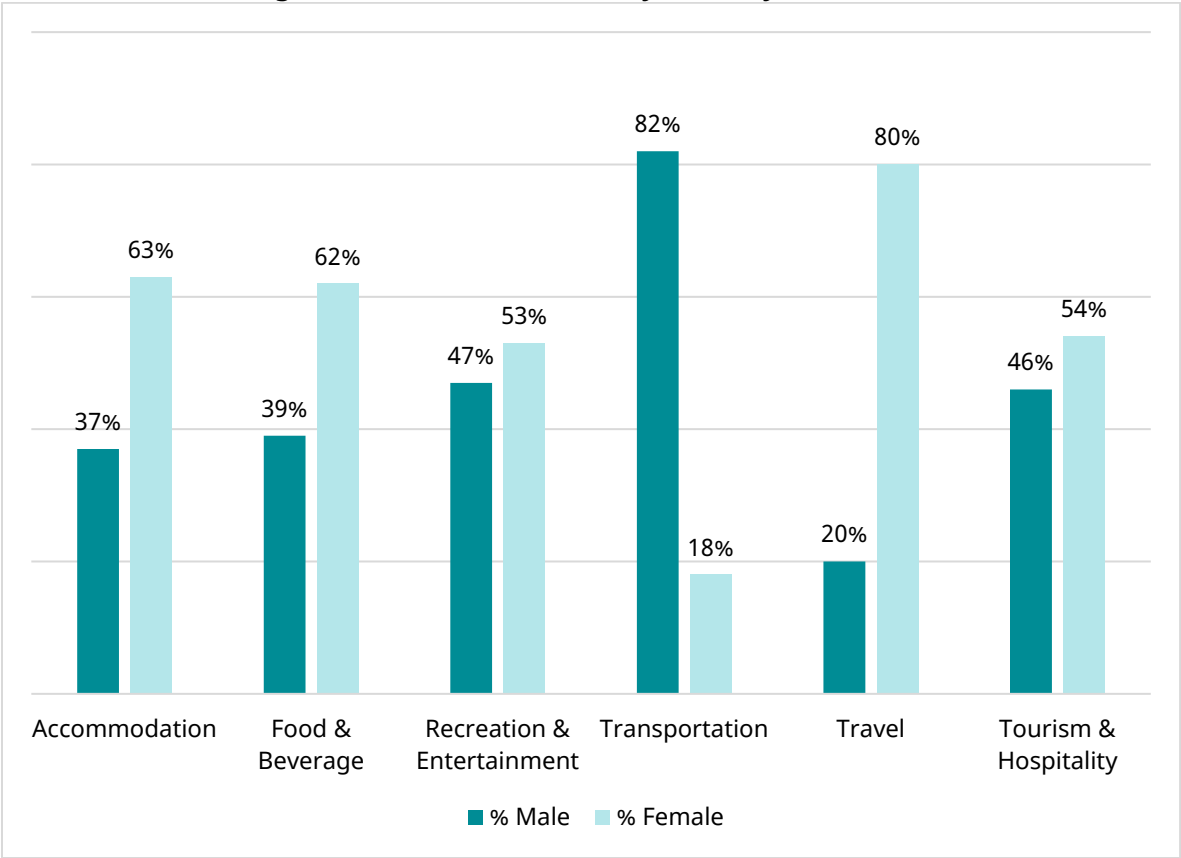
Employment	Saskatchewan	Canada
Tourism	53,194	1,859,806
Overall Employment	576,944	19,523,917
Percent Tourism of Overall Employment	9.2%	9.5%

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 (82%) while the travel services industry has the highest concentration of female workers (80%).

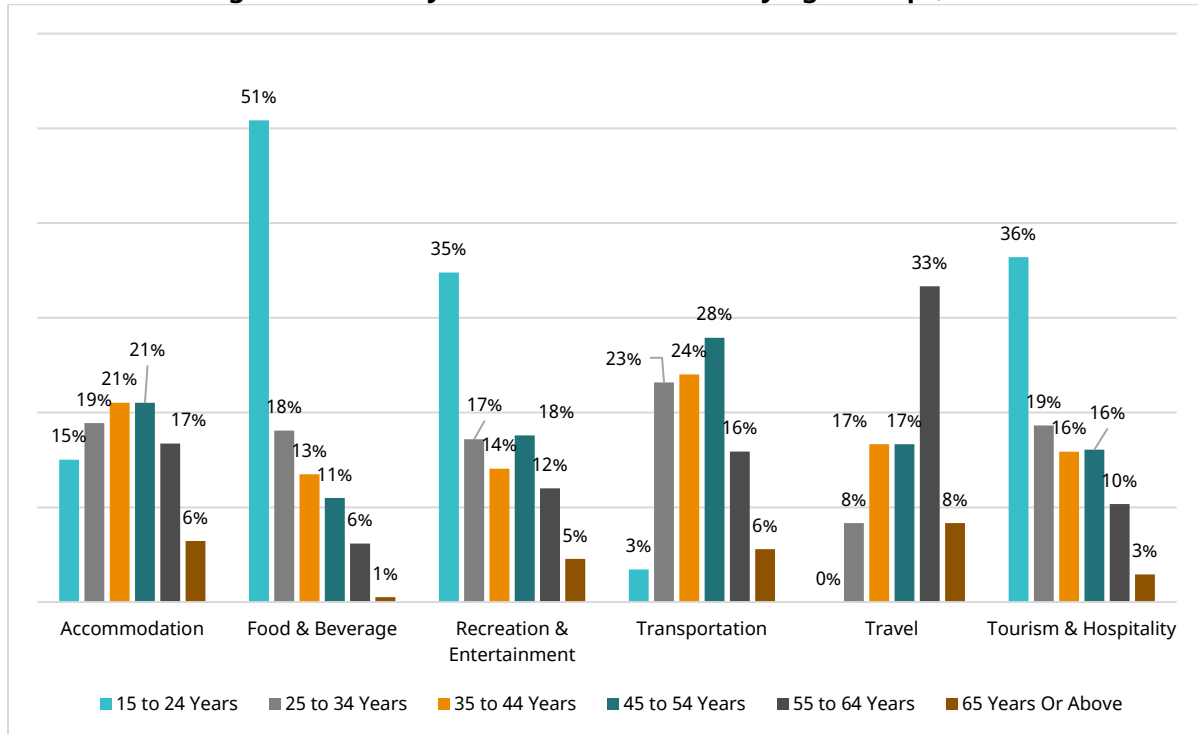
Figure 2: Workforce Gender by Industry and Sector, 2022



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

The food and beverage services industry has the youngest workforce with 51% of its workers being between 15 and 24 years of age, while the travel services industry is the oldest with 41% of its workers being 55 years or older. Approximately half (55%) of the workforce is under the age of 35.

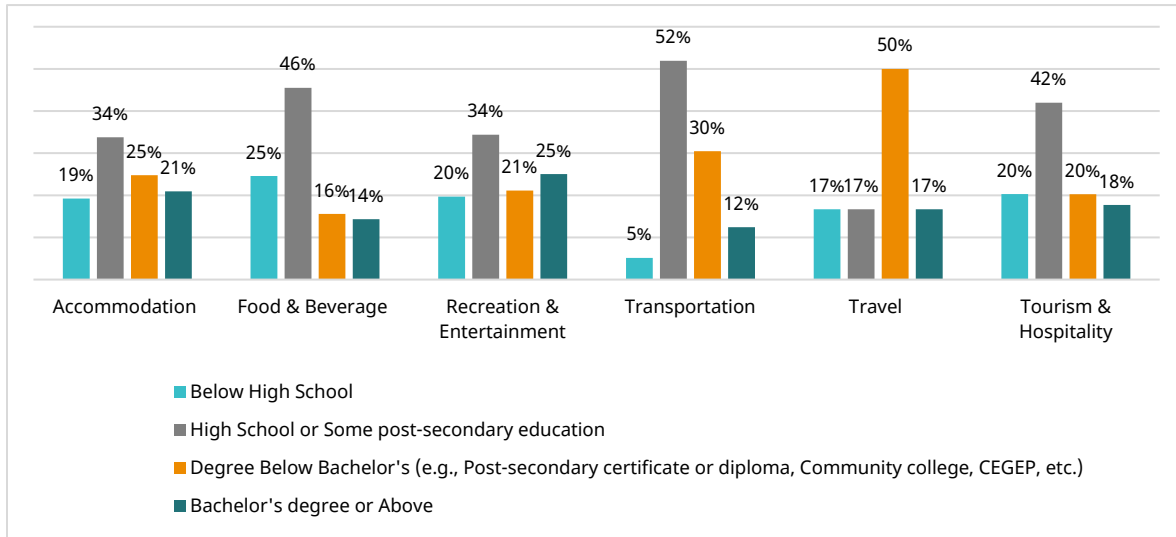
Figure 3: Industry and Sector Workforce by Age Groups, 2022



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

A total of 28% have a post-secondary diploma or higher. The travel services industry has the highest percentage of workers with a post-secondary diploma or higher (67%).

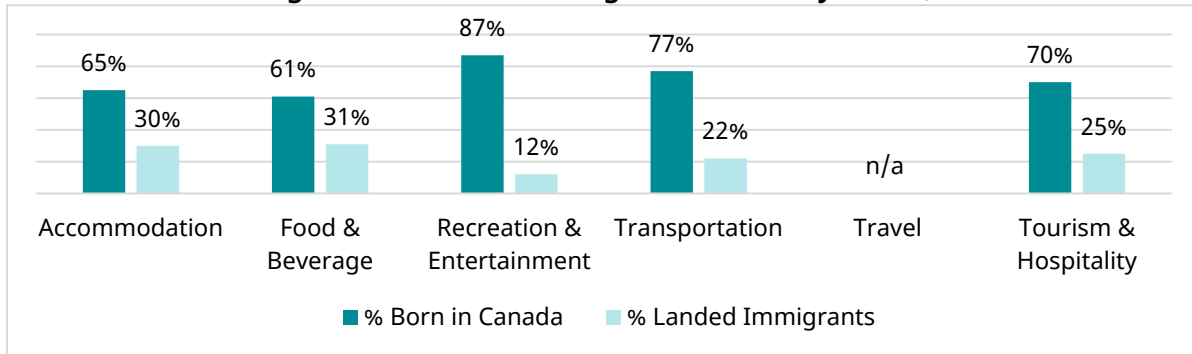
Figure 4: Workforce Education Level by Industry and Sector, 2022



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

In 2022, 70% of the tourism sector workforce were born in Canada, whereas 25% 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 food and beverage services.

Figure 5: Workforce Immigration Status by Sector, 2022

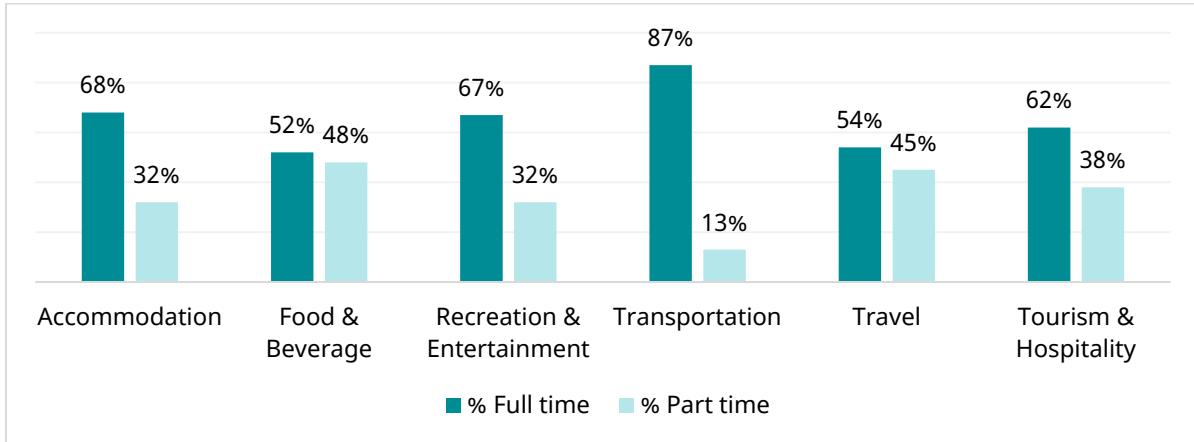


Source: THRC Employment Tracker, LFS Statistics Canada.

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 (87%) while the travel services industry has the highest percentage of part-time workers (38%).

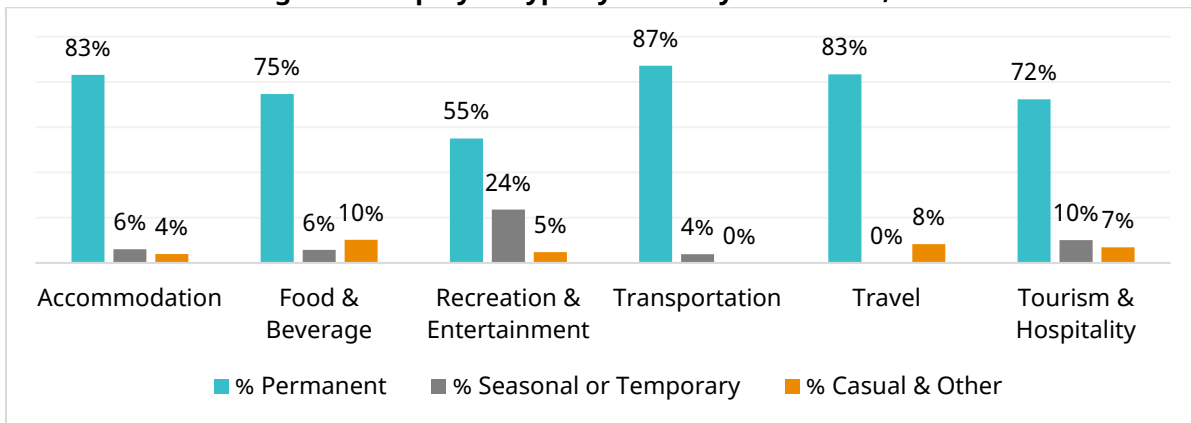
Figure 6: Job Status by Industry and Sector, 2022



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

Permanent workers account for 72% of the workforce, while 17% are seasonal, temporary, or casual workers (the remaining 11% of the workers have an unknown status in the Labour Force Survey). The transportation industry has the highest percentage of permanent employees (83%), whereas the recreation and entertainment, and travel services industries have the highest percentage of seasonal employees (24%).

Figure 7: Employee Type by Industry and Sector, 2022

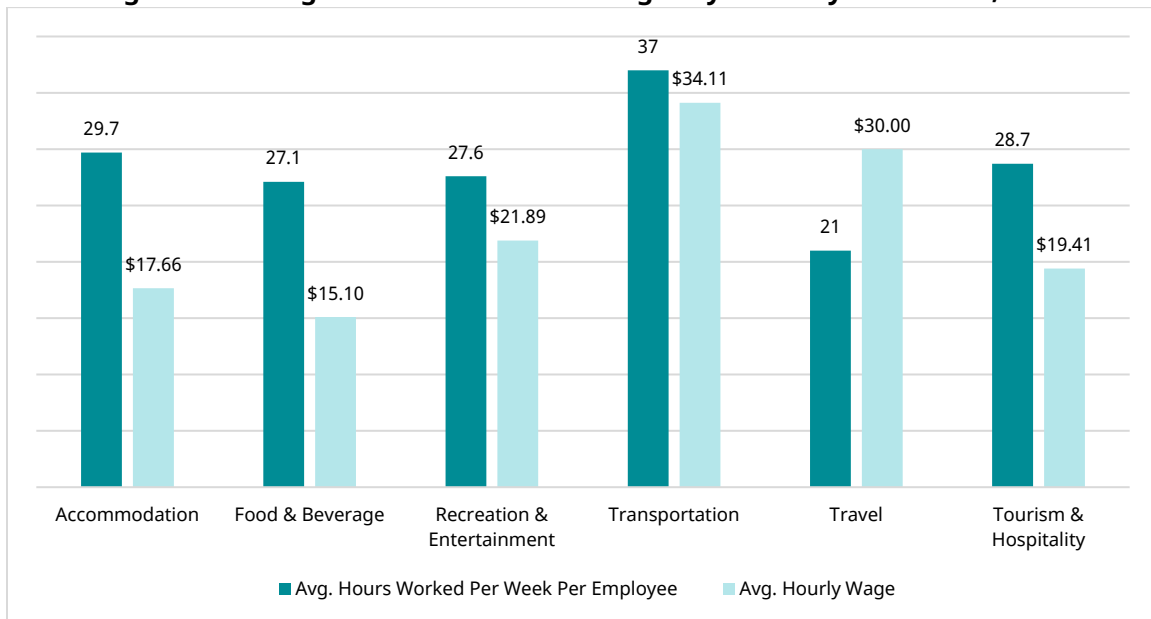


Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

*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 \$19.41 per hour and the average hours worked per week is 29. Employees in the transportation industry work the most hours per week (of 34 hours per employee) and are paid the highest average hourly wage (\$34.11 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 Saskatchewan tourism sector workforce have been employed in their current positions for six years. In terms of industries, the travel services industry has the longest average length of employment of 15.2 years, while food and beverage services industry has the shortest average length of employment of 4.4 years.

Table 3: Tourism Industry and Sector Workforce Experience, 2022

Years of Employment	Accommodation		Food & Beverage services		Recreation & Entertainment		Transportation		Travel services		Tourism	
	#	%	#	%	#	%	#	%	#	%	#	%
Less than 1	1,722	27%	4,750	18%	2,528	19%	333	5%	-	0%	9,333	18%
1 to 2	1,472	23%	9,333	35%	2,917	22%	528	8%	56	18%	14,306	27%
2 to 4	1,194	19%	6,667	25%	2,417	18%	1,722	27%	0	0%	11,972	22%
5 to 7	806	13%	2,528	10%	1,500	11%	1,417	22%	0	0%	6,250	12%
8 to 10	333	5%	1,139	4%	861	6%	639	10%	28	9%	3,000	6%
11 to 15	417	7%	1,167	4%	1,417	11%	972	15%	83	27%	4,056	8%
16 to 20	111	2%	389	1%	639	5%	139	2%	56	18%	1,333	3%
Over 20	333	5%	583	2%	1,194	9%	722	11%	83	27%	3,000	6%
Total	6,417	100%	26,556	100%	13,472	100%	6,444	100%	306	100%	53,194	100%
<i>Avg. Length</i>	<i>5.7 years</i>		<i>4.4 years</i>		<i>7.8 years</i>		<i>9.8 years</i>		<i>15.2 years</i>		<i>6.1 years</i>	

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

LEADING OCCUPATIONS

Table 4 provides an overview of the leading occupations in various tourism industries in terms of common certifications or training/education requirements, the primary tourism industry in which those workers are employed, annual employment levels, and average wage rates. The transportation and accommodation industries account for the occupations that have the highest average experience levels.

Table 4: Leading Occupations in Saskatchewan'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	6,833	\$13.60	3.6
6513	Food and beverage servers	<ul style="list-style-type: none"> On the job training Responsible beverage service certification 	Food & Beverage services	6,167	\$15.60	4.0
6322	Cooks	<ul style="list-style-type: none"> Completion of a three-year apprenticeship program for cooks or completion of college or other program in cooking or food safety 	Food & Beverage services	4,528	\$14.80	3.9
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	3,639	\$22.00	8.9
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	2,111	\$19.20	4.4
6511	Maîtres d'hôtel and hosts/hostesses	<ul style="list-style-type: none"> On the job training 	Food & Beverage services	1,917	\$14.80	4.7
6722	Operators and attendants in	<ul style="list-style-type: none"> On-the-job training 	Recreation & Entertainment	1,889	\$15.30	3.9

NOC	Occupation	Certification/Training Requirements	Primary Industry	Employment	Avg. Hourly Wage	Avg. Years of Experience
	amusement, recreation and sport					
6611	Cashiers	<ul style="list-style-type: none"> On-the-job training 	Food & Beverage services	1,806	\$12.80	2.3
6311	Food service supervisors	<ul style="list-style-type: none"> Completion of a community college program in food service administration, hotel and restaurant management or related discipline, or equivalent job experience 	Food & Beverage services	1,778	\$16.30	4.4
7512	Bus drivers, subway operators and other transit operators	<ul style="list-style-type: none"> Appropriate class driver's license Additional certifications such as First-Aid, Transportation of Dangerous Goods, and Air Brakes Endorsement 	Transportation	1,444	\$25.00	7.5
6731	Light duty cleaners	<ul style="list-style-type: none"> On-the-job training Certification for housekeeping room attendants or similar certification 	Accommodation	1,417	\$14.80	2.6
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	1,250	\$19.60	5.6
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	1,222	\$15.90	9.4
8612	Landscaping and grounds maintenance labourers	<ul style="list-style-type: none"> A provincial licence to apply chemical fertilizers, fungicides, herbicides and pesticides may be required. 	Recreation & Entertainment	944	\$17.80	4.7

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"> ▪ 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. 	Recreation & Entertainment	889	\$19.00	2.7
6512	Bartenders	<ul style="list-style-type: none"> ▪ Responsible beverage service certification <ul style="list-style-type: none"> ▪ On-the-job training 	Food & Beverage services	694	\$16.50	4.2
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	667	\$26.00	8.9
6313	Accommodation, travel, tourism and related services supervisors	<ul style="list-style-type: none"> ▪ Related post-secondary degree or diploma ▪ Extensive practical experience and training 	Accommodation	611	\$24.00	11.2
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	528	-	12.5
5131	Producers, directors, choreographers	<ul style="list-style-type: none"> ▪ Related post-secondary degree or diploma ▪ Extensive practical experience and training 	Recreation & Entertainment	361	-	8.5

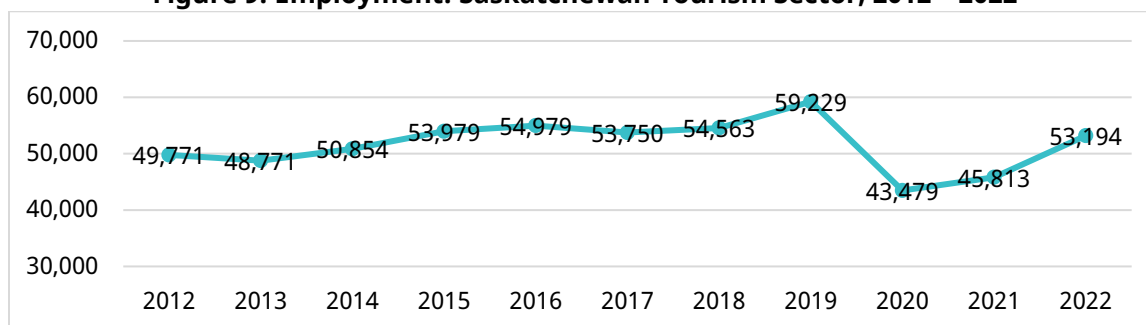
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access.

2. IMPACT OF THE PANDEMIC

CHANGES IN THE LEVEL OF EMPLOYMENT

Prior to the pandemic, sector employment increased at an annual growth rate of 2.5% from 2012 to 2019, rising from an average of 49,771 employees per month in 2012 to 59,229 in 2019. However, employment declined sharply with the onset of COVID-19 in March 2020. So far in 2022, average monthly employment levels (53,194 employees per month) remain below pre-pandemic levels.

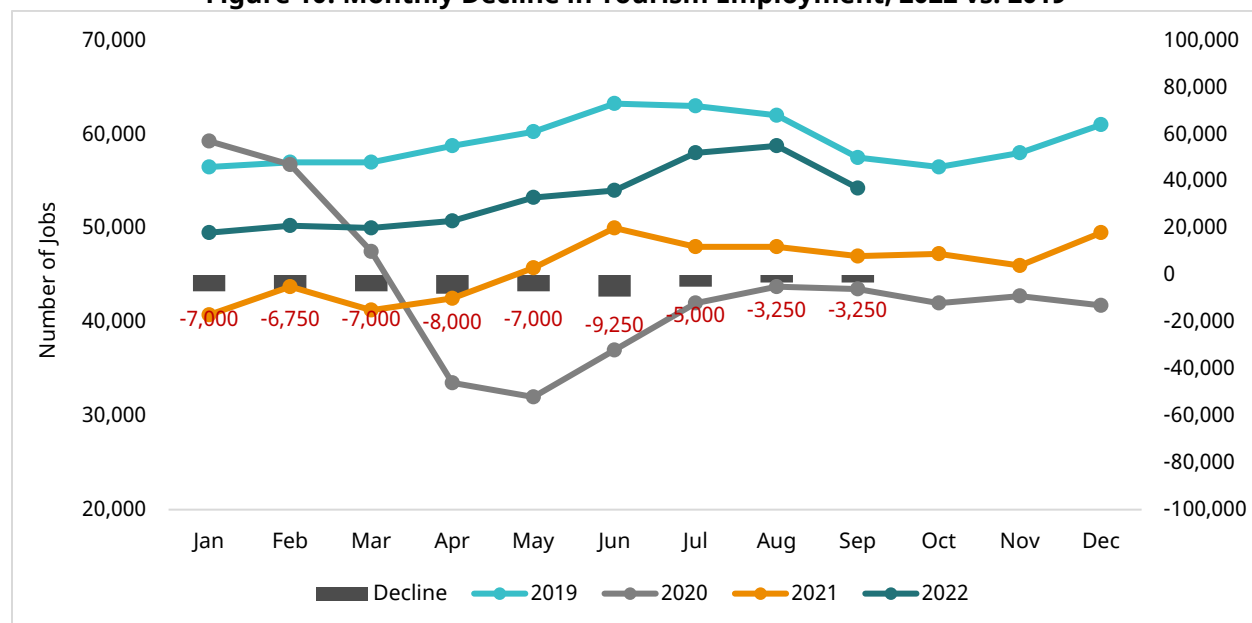
Figure 9: Employment: Saskatchewan Tourism Sector, 2012 – 2022



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 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 9% in recreation and entertainment to losses of 66% in the 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	9,583	5,042	5,167	6,417	-47%	-46%	-33%
Food and Beverage services	29,542	23,500	24,042	26,556	-20%	-19%	-10%
Recreation and Entertainment	12,375	8,625	10,333	13,472	-30%	-17%	9%
Transportation	6,833	5,750	5,479	6,444	-16%	-20%	-6%
Travel services	896	563	792	306	-37%	-12%	-66%
Total	59,229	43,479	45,813	53,194	-27%	-23%	-10%

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

IMPACT BY EMPLOYEE SEGMENT

Job losses did not impact all demographic groups equally in 2020. Seasonal and casual workers were the most likely to be displaced. Since 2020, casual workers continue to be the most likely demographic group to be displaced.

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	36,313 (61%)	27,500 (63%)	26,083 (57%)	33,028 (62%)	-24%	-28%	-9%
Part-time	22,958 (39%)	16,042 (37%)	19,833 (43%)	20,139 (38%)	-30%	-14%	-12%
Permanent							
Permanent	43,250 (73%)	32,875 (76%)	33,292 (73%)	38,500 (72%)	-24%	-23%	-11%
Seasonal	3,375 (6%)	1,333 (3%)	2,479 (5%)	3,194 (6%)	-61%	-27%	-5%

Demographics	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
Casual	4,125 (7%)	2,167 (5%)	2,458 (5%)	3,139 (6%)	-47%	-40%	-24%
Temporary	2,271 (4%)	1,729 (4%)	2,292 (5%)	2,167 (4%)	-24%	1%	-5%
Gender							
Male	27,792 (47%)	21,750 (50%)	22,563 (49%)	24,278 (46%)	-22%	-19%	-13%
Female	31,438 (53%)	21,729 (50%)	23,292 (51%)	28,917 (54%)	-31%	-26%	-8%
Age Group							
15 to 24	19,917 (34%)	14,292 (33%)	16,854 (37%)	19,361 (36%)	-28%	-15%	-3%
25 to 34	13,313 (22%)	10,250 (24%)	8,750 (19%)	9,917 (19%)	-23%	-34%	-26%
35 to 44	10,542 (18%)	7,521 (17%)	7,396 (16%)	8,444 (16%)	-29%	-30%	-20%
45 to 54	7,042 (12%)	5,458 (13%)	6,604 (14%)	8,556 (16%)	-22%	-6%	21%
55 to 64	6,396 (11%)	4,417 (10%)	4,604 (10%)	5,500 (10%)	-31%	-28%	-14%
65 or above	2,271 (4%)	1,563 (4%)	1,583 (3%)	1,556 (3%)	-31%	-30%	-31%
Education							
Below high school	9,792 (17%)	7,146 (16%)	9,958 (22%)	10,806 (20%)	-27%	2%	10%
High school or some post-secondary	24,750 (42%)	19,688 (45%)	18,583 (41%)	22,333 (42%)	-20%	-25%	-10%
Degree below bachelor's	15,479 (26%)	10,042 (23%)	9,000 (20%)	10,778 (20%)	-35%	-42%	-30%
Bachelor's degree or above	9,146 (15%)	6,667 (15%)	8,438 (18%)	9,417 (18%)	-27%	-8%	3%

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

There was also a year-over-year reduction in employees with 2 to 4 years and 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	12,000	7,229	9,646	9,333	-40%	-20%	-22%
1 year	13,125	8,438	7,208	14,306	-36%	-45%	9%
2 to 4 years	16,042	13,271	13,000	11,972	-17%	-19%	-25%
5 to 7 years	6,167	4,688	5,375	6,250	-24%	-13%	1%
8 to 10 years	3,146	3,104	3,458	3,000	-1%	10%	-5%
11 to 15 years	3,542	3,188	3,500	4,056	-10%	-1%	15%
16 to 20 years	1,563	1,188	1,104	1,333	-24%	-29%	-15%
Over 20 years	3,646	2,375	2,479	3,000	-35%	-32%	-18%
Total	59,229	43,479	45,813	53,194	-27%	-23%	-10%
Avg. years	6.0	6.2	6.3	6.1	-	-	-

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 8% in 2020. In 2022, the average hours worked are almost back to 2019 levels. All sectors, with the exception of food and beverage services and travel services industries have experienced an increase in average hours per week relative to 2019 which also reflect difficulties in filling positions (i.e., existing workers are asked to work more hours).

Table 8: SK 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	28.8	25.7	27.0	29.7	-11%	-6%	3%
Food and Beverage services	27.3	23.9	25.2	27.1	-12%	-8%	-1%
Recreation and Entertainment	25.6	25.6	25.6	27.6	0%	0%	8%
Transportation	34.2	34.0	35.4	37.0	-1%	4%	8%
Travel services	32.0	28.0	26.0	21.0	-13%	-19%	-34%
Tourism Saskatchewan	28.0	25.9	26.8	28.7	-8%	-4%	2%

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

Overall, the average hourly wage in Saskatchewan's tourism sector increased during the pandemic. Average hourly wage increased by 6% in 2021 and by 11% in 2022 as compared to 2019. The average hourly wage increased from \$17.55 in 2019 to \$18.47 in 2020, \$18.59 in 2021 and \$19.41 in 2022.

Table 9: Average Hourly Wage in Saskatchewan'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	\$17.51	\$16.13	\$16.99	\$17.66	-8%	-3%	1%
Food and Beverage services	\$14.16	\$14.36	\$14.76	\$15.10	1%	4%	7%
Recreation and Entertainment	\$20.53	\$22.25	\$21.63	\$21.89	8%	5%	7%
Transportation	\$27.75	\$31.58	\$31.17	\$34.11	14%	12%	23%
Travel services	\$19.70	\$23.00	\$32.00	\$30.00	17%	62%	52%
Tourism Saskatchewan	\$17.55	\$18.47	\$18.59	\$19.41	5%	6%	11%

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 and accommodation industries 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: Change in Employment of Leading Occupations in Saskatchewan's Tourism Sector (2019-2022)

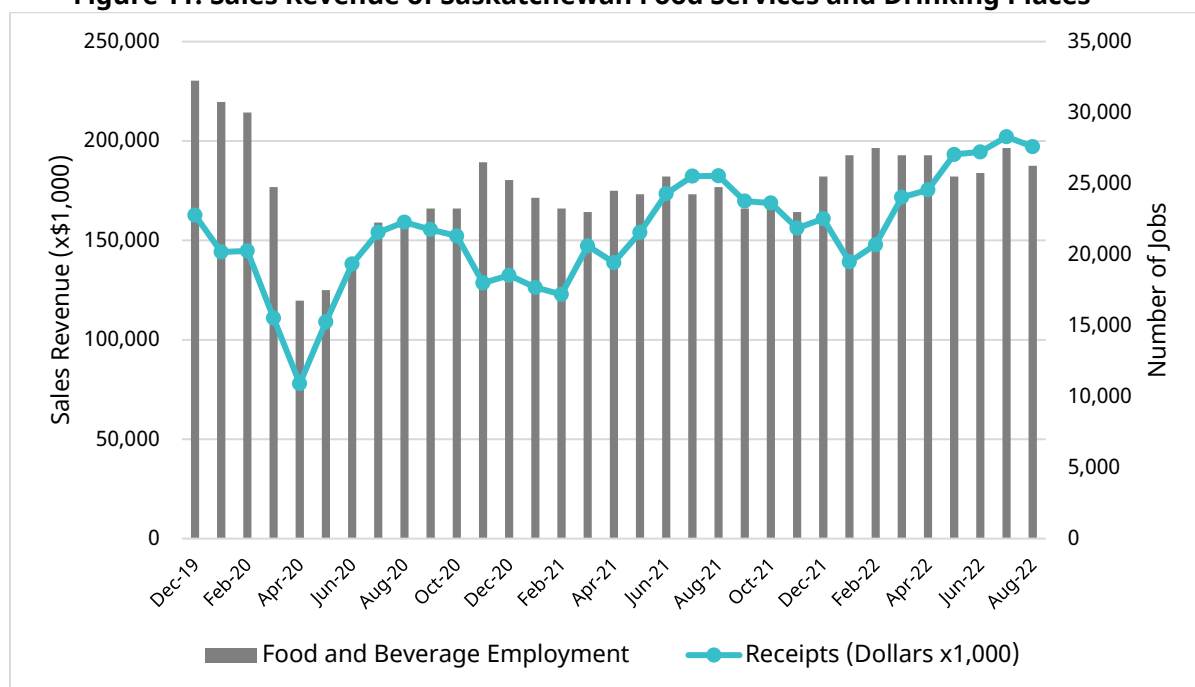
NOC	Occupations	2019	2020	2021	2022	% Change 20 vs 19	% Change 21 vs 19	% Change 22 vs 19
6711	Food counter attendants, kitchen helpers	8,458	6,771	7,604	6,833	-20%	-10%	-19%
6513	Food and beverage servers	5,896	3,479	3,854	6,167	-41%	-35%	5%
6322	Cooks	4,563	3,333	3,979	4,528	-27%	-13%	-1%
0631	Restaurant and food service managers	3,563	3,167	2,208	3,639	-11%	-38%	2%
5254	Program leaders and instructors in recreation, sport and fitness	2,104	1,500	1,938	2,111	-29%	-8%	0%
6511	Maîtres d'hôtel and hosts/hostesses	1,688	1,667	1,417	1,917	-1%	-16%	14%
6722	Operators and attendants in amusement, recreation and sport	1,792	833	1,521	1,889	-53%	-15%	5%
6611	Cashiers	2,250	1,417	2,313	1,806	-37%	3%	-20%
6311	Food service supervisors	3,000	2,833	2,479	1,778	-6%	-17%	-41%
7512	Bus drivers, subway operators and other transit operators	1,854	1,167	1,583	1,444	-37%	-15%	-22%
6731	Light duty cleaners	2,438	1,250	1,646	1,417	-49%	-32%	-42%
6321	Chefs	854	583	500	1,250	-32%	-41%	46%
6525	Hotel front desk clerks	1,104	896	354	1,222	-19%	-68%	11%
8612	Landscaping and grounds maintenance labourers	521	208	667	944	-60%	28%	81%
6733	Janitors, caretakers and building superintendents	813	479	313	889	-41%	-62%	9%
6512	Bartenders	1,396	792	438	694	-43%	-69%	-50%
0632	Accommodation service managers	1,271	500	1,125	667	-61%	-11%	-48%
6313	Accommodation, travel, tourism and related services supervisors	1,042	292	417	611	-72%	-60%	-41%
7513	Taxi and limousine drivers and chauffeurs	833	354	542	528	-58%	-35%	-37%

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 May 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 Saskatchewan Food Services and Drinking Places



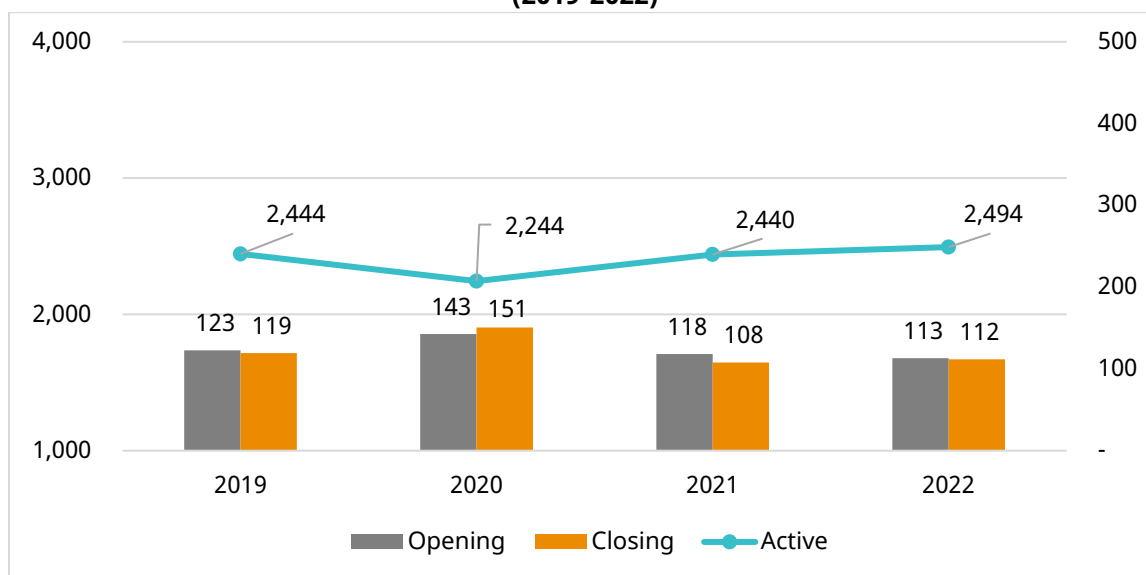
Source: Statistics Canada, Labour Force Survey via Real Time Remote Access; Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000)

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 2,444 in 2019 to 2,244 in 2020 before recovering to 2,494 in 2022.

Figure 12: Avg Monthly Business Opening and Closures, Saskatchewan's Tourism Sector (2019-2022)



Source: THRC Employment Tracker/Statistics Canada.

DATA ON WHERE EMPLOYEES WENT

Data indicates that the tourism sector lost employees to other sectors, either when permanent employees were displaced because of the pandemic or when seasonal workers failed to return for the following season. A recent Prudential Finance study found that about 22% of workers changed their jobs or careers during the pandemic.⁵ However, there is limited data available as to which sector these departing employees went. It is likely that most of these workers moved to other sectors which were growing in 2021, particularly retail and healthcare, as indicated in the table below.

⁵ 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, Saskatchewan (2019-2022)

Industry	2019	2020	2021	2022	Change 20 vs 19	Change 21 vs 20	Change 22 vs 21
Accommodation	9,583	5,042	5,167	6,417	-4,541	125	1,250
Food and Beverage services	29,542	23,500	24,042	26,556	-6,042	542	2,514
Recreation and Entertainment	12,375	8,625	10,333	13,472	-3,750	1,708	3,139
Transportation	6,833	5,750	5,479	6,444	-1,083	-271	965
Travel services	896	563	792	306	-333	229	-486
Sector Totals	59,229	43,479	45,813	53,194	-15,750	2,334	7,381
Accommodation and food services (non-tourism)	729	688	813	889	-42	125	76
Administrative and support, waste management and remediation services	14,646	15,188	14,729	13,417	542	-458	-1,313
Agriculture, forestry, fishing and hunting	41,563	37,500	29,521	26,500	-4,063	-7,979	-3,021
Arts, entertainment and recreation (non-tourism)	604	438	250	556	-167	-188	306
Construction	45,792	40,188	43,250	45,611	-5,604	3,063	2,361
Educational services	44,250	43,333	45,667	47,361	-917	2,333	1,694
Finance and insurance	21,063	21,417	21,208	24,417	354	-208	3,208
Health care and social assistance	79,708	79,833	86,813	90,722	125	6,979	3,910
Information and cultural industries	7,938	8,104	6,250	6,028	167	-1,854	-222
Manufacturing	29,688	31,000	31,875	31,861	1,313	875	-14
Mining, quarrying, and oil and gas extraction	22,271	19,167	18,771	17,222	-3,104	-396	-1,549
Other services (except public administration)	27,750	29,042	26,417	26,472	1,292	-2,625	56
Professional, scientific and technical services	26,833	26,896	27,854	29,667	63	958	1,813
Public administration	30,792	33,271	35,229	35,556	2,479	1,958	326
Real estate and rental and leasing	7,896	7,063	6,604	5,833	-833	-458	-771
Retail trade	61,542	60,063	70,271	71,972	-1,479	10,208	1,701
Transportation and warehousing (non-tourism)	19,438	19,167	18,500	19,250	-271	-667	750
Utilities	6,250	5,875	6,063	6,306	-375	188	243
Wholesale trade	22,979	22,313	22,333	24,000	-667	21	1,667
Total Saskatchewan Employment	570,917	544,104	558,188	576,944	-26,813	14,083	18,757

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 Saskatchewan'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 7.1%. The leading industry in terms of growth is expected to be accommodation (15.2%) and travel services (18.1%)

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

Saskatchewan	Projected Growth vs 2020 Levels					
	2021	2022	2023	2024	2025	4-year Growth
Tourism Sector Totals	45,813	54,825	57,937	59,357	60,384	31.8%
<i>Year-over-year Growth</i>	-	19.7%	5.7%	2.4%	1.7%	7.1%
Industry						
Accommodation	5,167	8,247	8,833	8,981	9,110	76.3%
<i>year-over-year growth</i>	-	59.6%	7.1%	1.7%	1.4%	15.2%
Food and Beverage services	24,042	28,810	29,962	30,396	30,849	28.3%
<i>year-over-year growth</i>	-	19.8%	4.0%	1.4%	1.5%	6.4%
Recreation and Entertainment	10,333	11,549	12,440	12,770	13,066	26.4%
<i>year-over-year growth</i>	-	11.8%	7.7%	2.7%	2.3%	6.0%
Transportation	5,479	5,945	6,355	6,687	6,802	24.1%
<i>year-over-year growth</i>	-	8.5%	6.9%	5.2%	1.7%	5.6%
Travel services	792	1,278	1,410	1,491	1,543	94.8%
<i>year-over-year growth</i>	-	61.4%	10.3%	5.7%	3.5%	18.1%

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

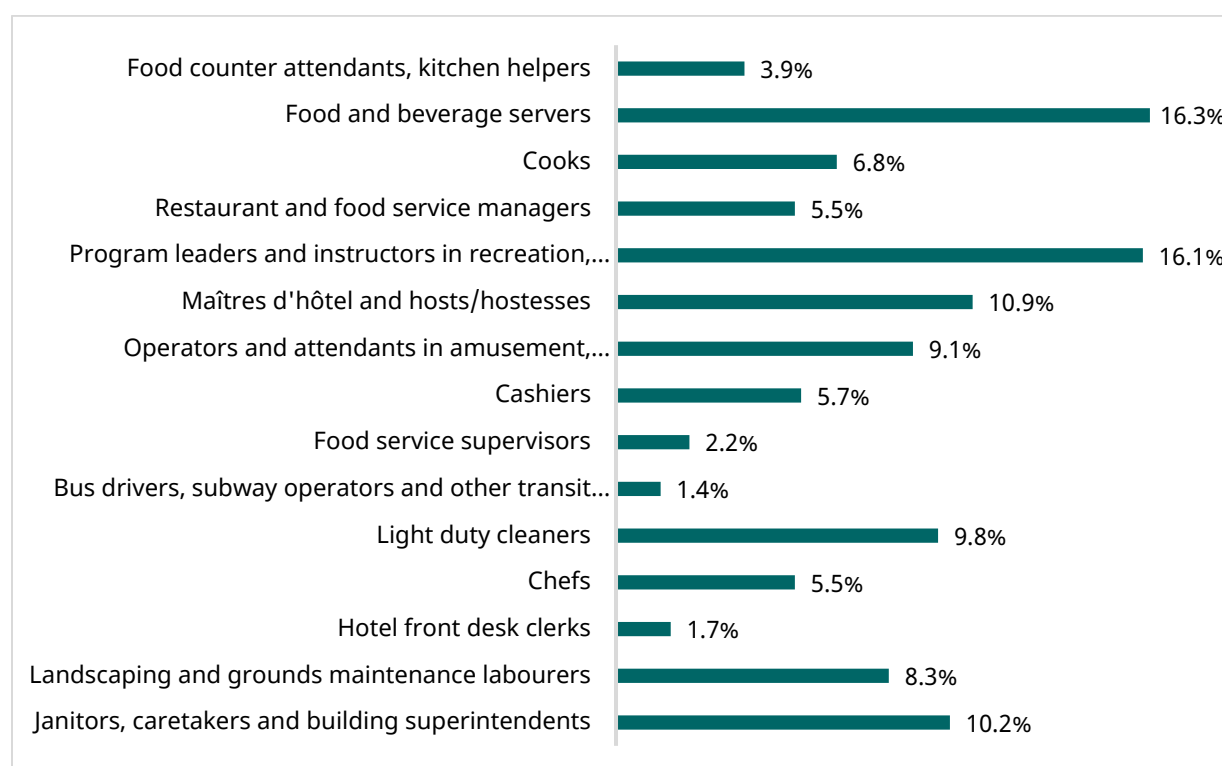
Across Canada, the Conference Board projected compounded annual employment growth in the tourism sector of 6.4% of the 4-year growth period from 2021 to 2025. This growth is consistent with the results of a recent survey conducted for Tourism HR Canada.⁶ Of the 700 tourism employers surveyed, 29% are projecting employment to increase. The projected growth was attributed to improving business conditions (59% of employers indicated that current business and operating conditions have improved compared to the summer of 2021) and business expansion (53% of those employers who anticipate an increase in employment reported that their operations are growing).

⁶ Business Intelligence Survey, Labour Market Information, Tourism HR Canada, 2022

EMPLOYMENT BY OCCUPATION

The following chart shows the projected four-year compounded annual growth in Saskatchewan's tourism sector for the 15 leading occupations. The fastest growing occupations are expected to be food and beverage servers and program leaders and instructors in recreation.

Figure 13: SK Tourism Projected 5-year compounded annual growth rates - Top 15 Occupations⁷



⁷ Detailed descriptions of these occupations can be found here:
<https://noc.esdc.gc.ca/Structure/Hierarchy?objectid=%2Fd0IGA6qD8JPRfoj5UCjpg%3D%3D>

