Vancouver Island Tourism Labour Market Study

Final Report

Presented to:

Vancouver Island Tourism Human Resources Steering Committee

Roslyn Kunin & Associates, Inc. (RKA, Inc.)

3449 West 23rd Avenue
Vancouver, BC V6S 1K2
Voice: (604) 736-0783 / Fax: (604) 736-0789
Rkunin@Rkunin.com
http:/www.rkunin.com/

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Table of Contents

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- Accent Inns
- Longwood Brew Pub
- Mount Washington Alpine Resort
- Old House Village Suites
- Tigh-Na-Mara Seaside Spa Resort and Conference Centre

The Longwood Brew Pub also generously provided a restaurant gift certificate to all Nanaimo focus group participants.

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- Mount Washington Alpine Resort
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- Wickaninnish Inn

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Executive Summary

In this report, Roslyn Kunin and Associates (RKA) has examined available information regarding overall employment level and human resource requirements for the tourism industry as a whole in the Vancouver Island/Coast region. We also have examined statistical data sources and survey reports, etc. to gain background information to the tourism industry in the province and on Vancouver Island specifically.

We then provide estimates of employment in core tourism related occupations in the region in year 2007 and 2008, and provide projections of the same in the period from 2009 to 2015. We have also presented statistical data available concerning different sources of labour that provides for the workforce in the tourism and hospitality industry in the region. We also present our estimated and projected labour force growth based on population growth and labour force participation patterns for the purposes of determining on the extent of labour supply-demand gaps, if any.

Employment in core tourism occupations in this study in the region will continue to grow positively, despite a set-back in 2009. In addition, attrition will result in additional openings for replacement needs. Total potential labour demand is summarized in the Table that follows.

In general, we have found that for the whole group of core tourism occupations under analysis, labour force growth should meet the needs of labour demand until 2013. After that, an ageing population and its resulting effect of limited labour force growth will mean that even if the industry hires every single individual available to work in that occupation, (therefore meaning zero unemployment), there will be a labour shortage.

For individual occupations within the group, the supply shortages for some appear much earlier than 2014. These include Chefs and Cooks, Food Services Occupations, including Food and Beverage Services, Bartenders, Food Counter Attendants, and Kitchen Helpers. To a less extent, Front Desk Clerks and Conference and Event Planners also show shortfall starting in 2010.

Summary Table I Estimated Number of Total Job Openings Due to Growth and Attrition for Core Tourism Occupations in Core Tourism Related Industries, Vancouver Island/Coast Region, 2009 to 2015

	Growth and Attrition Total 2009 to 2015
A211.0621 Retail Trade Managers	2,347
A221.0631 Restaurant and Food Service Managers	739
A222.0632 Accommodation Service Managers	344
B316.1226 Conference and Event Planners	14
F154.5254 Program Leaders and Instructors in Recreation and Sport	116
G011.6211 Retail Trade Supervisors	289
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	225
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	20
G211.6421 Retail Salespersons and Sales Clerks	2,703
G311.6611 Cashiers	1,128
G411.6241 Chefs	216
G412.6242 Cooks	1,121
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	164
G512.6452 Bartenders	275
G513.6453 Food and Beverage Servers	1,500
G715.6435 Hotel Front Desk Clerks	287
G721.6441 Tour and Travel Guides	32
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)	38
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	41
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	49
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	56
G93.666 Cleaners	1,105
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	1,981
Total of Selected Occupations	14,790

Source: RKA

This report also presents the results of an online survey we conducted as well as interviews with industry stakeholders on current labour market conditions, demographic profiles, projected future labour requirement, and challenges faced by employers in recruitment and retention issues.

We have found that in general, the industry has been able to find enough people to fill in most positions throughout the year, even during summer months. However, in many cases employers do report having to take a long time to fill in the positions, and some may have to take less experienced or qualified workers to fill vacancies. The positions that industry stakeholder agreed as facing the most challenges include:

- Housekeeping - first and foremost;
- Culinary staff, specifically cooks (front-line/first), sous chefs and chefs, and
- Entry level restaurant (i.e. bus people) and kitchen (i.e. dishwashers)

Other occupations frequently mentioned as being difficult to fill and/or hold onto good, qualified staff include:

- Food servers
- Front-line staff (including front desk)
- Guides (including boat tour guides)

Other positions that industry stakeholders cited as potentially facing labour shortages include trades positions in maintenance, security, custodial/janitorial, and massage therapists working in spas.

Many areas of the industry face a challenge in recruiting young people into the sector as well as maintaining a level of apprenticeship enrolment that is sustainable to the industry. It is important to communicate to young people the kinds of jobs available in the industry, including career and managerial positions that are in need of young recruits. High school career counsellors and parents also need to be involved to encourage more young people to enter these seemingly unskilled jobs but with potential career opportunities. Certain factors impacting apprenticeship training completions have been identified.

We have also examined other issues related to recruitment and retention of skilled workers for the industry. Utilization of non-traditional types of labour supply, temporary use of foreign workers, seasonal nature of the work, inconsistency of the availability of work, multi-tasking, wages and compensation, and other factors have been thoroughly explored and discussed throughout the report.

Finally, we present recommendations from industry stakeholders as well as ours on potential ways to better utilize existing sources of labour, and to develop additional sources of labour supply to meet the industry’s needs.

1. Introduction

Tourism is travel for recreational, leisure or business purposes. The goods and services associated with tourism create the opportunity for employment in many service industries. These service industries include: transportation services, such as airlines, cruise ships and taxis; hospitality services, such as accommodations, including hotels and resorts, and all types of restaurants and food services; entertainment venues, such as amusement parks, casinos, various music venues and the theatre; and retail shopping.

Tourism worldwide has grown to become the largest and fastest growing industry in the world. The tourism industry in British Columbia is a similarly significant and essential component of the provincial economy. In B.C., tourism generates over $9 billion in revenue. While already on a steady path of growth, the provincial government has further tasked the tourism industry with the goal of doubling tourism revenues to almost 20 billion by the year 2015 and to grow B.C.'s role as a prime all-season resort and tourism destination.

As a result of its remarkable expansion over the last 20 years, the British Columbia tourism industry has not only matured impressively but has also developed to become increasingly collaborative, coordinated and forward-thinking. To this end, B.C. tourism businesses recognize the need to research, plan and prepare for their industry's imminent labour requirements. This task must be done in a way that will ensure maximum benefits from the industry's upcoming growth while sustaining the world class tourism destination and workforce standards that tourists of the future will continue to expect when they visit British Columbia.

In recognition of a common need for long term tourism labour force planning and preparation that meets not only provincial tourism goals but also supports local and regional needs, the Vancouver Island Tourism Human Resources Steering Committee ("the Committee") has been established. Partners include:

- go2 - the B.C. tourism industry's voice on province-wide tourism labour and employment matters;
- UNITE Here Local 40 - the largest union in British Columbia devoted to representing working people in the hospitality industry;
- Employment and Labour Market Services Division of British Columbia Ministry of Housing and Social Development; and,

- Tourism operators, Educators, First Nations and a Destination Marketing Organization (DMO) representative.

The overarching objective of the Committee is to support tourism communities on Vancouver Island in achieving their business vision by ensuring there will exist an available supply of highly-skilled workers and an adaptable workforce in their region. Ultimately, the mandate of the Committee will be to develop, together with industry stakeholders, a long term human resource plan for Vancouver Island.

Roslyn Kunin & Associates, Inc. (RKA) has been retained by the Committee to conduct region specific labour market analysis for Vancouver Island. Specifically, the study's Project Objectives include the following:

1. To estimate labour demand in the Vancouver Island tourism region to 2015;

2. To estimate labour supply and potential demand-supply gaps in the tourism region;

3. To ensure industry training requirements are aligned to provincial and regional needs;

4. To engage regional tourism stakeholders in the process to provide direction to the labour market analysis process and to provide regional input into the provincial Human Resources strategy;

5. To use this process as a means of assessing the need for region-specific Human Resources strategies and where appropriate identifying organizations(s) willing to develop and implement these strategies.

The following report presents the findings of this study. It should be noted that the term "**tourism**" is used interchangeably with "**tourism and hospitality**". The hospitality industry is clearly a significant and very important component of the total tourism industry. The layout of the report is as follows: in the next section, we will describe the approaches we adopted in collecting data and information for the report. In Sections 3 through 8, we will provide a labour market data and analysis from our research. Finally, in Section 9, we will summarize findings.

2. Methodology

The methodology for the Vancouver Island Tourism Labour Market study includes both secondary and primary research involving tourism industry stakeholders throughout the Vancouver Island tourism region as well as provincial tourism sector representatives.

2.1. Secondary Research

RKA has reviewed existing data on visitation to Vancouver Island and research studies on tourism and hospitality labour demand, job occupations and human resource requirements and issues related to recruitment, training and retention of the tourism and hospitality workforce. The following provided relevant research data and information:

- *go2*
- *Tourism Association of Vancouver Island*
- *Tourism British Columbia*
- *British Columbia Council of Tourism Associations*
- *Canadian Tourism Commission*
- *Tourism Industry Association of Canada*
- *BC Stats*
- *Statistics Canada Census and Labour Force Survey*
- *Various sources of tourism indicators which provide monthly and current year-to-date data including BC Ferries, airport passenger volume, visitor information centre visitor parties and other key industry tracking statistics*

The References section of this report provides a more detailed listing of the materials used in preparing this report.

2.2. Primary Research

The primary research for this project was conducted during February, March and early April 2009. There were three independent yet interrelated approaches adopted during information/data gathering, including:

- Round Table/Focus Groups with tourism and hospitality industry representatives in Courtenay, Nanaimo and Victoria;

- Online Survey of tourism and hospitality industry employers; and,
- Follow-up telephone interviews with employers and other industry stakeholders

The purpose of the round table/focus groups was to discuss the current labour situation with regards to tourism and hospitality growth, occupation needs, issues and requirements and to present and "test" different growth scenarios for the industry's labour market needs to the year 2015. The round table/focus group discussions were setup with assistance from members of the Vancouver Island Tourism Human Resources Steering Committee members who also participated in the focus group meetings. Meeting agenda and handouts with Vancouver Island tourism employment data, charts and statistics on job occupations were prepared for each focus group and handed out to the participants. Appendix II and Appendix III provide these materials as well as a list of participants.

An online survey specifically designed to gather information on employee trends and recruitment, training and retention strategies was developed for Vancouver Island tourism and hospitality employers. Data for the online survey was collected during the period from February 23rd to March 25th, 2009. A total of 117 respondents participated, and of these 96 responses were complete to the end of the questionnaire.

A break-down of the on-line survey respondents by the main sub-sector they represent is as follows:

Tourism Sector Represented by Survey Respondents

	Response Percent
Accommodation	53.00%
Food and Beverage	5.10%
Recreation and Entertainment	19.70%
Transportation	6.00%
Travel Services	1.70%
Retail Trade	2.60%
Supplier to Tourism and Hospitality industry	0.00%
Other	12.00%

N=117

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

Many respondents categorized as in Accommodation also provided input regarding food and beverage.

A break-down of the respondents by region of Vancouver Island is shown here.

Region of Vancouver Island Represented by Survey Respondents

	Response Percent
North Island	21.10%
North Central	16.70%
Pacific Rim	12.30%
Central Island	31.60%
Cowichan	7.90%
Gulf Islands	3.50%
South Island	25.40%

Note: Responses do not total 100% because respondents could select more than one region in which they operate.
N=114

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

The consultants worked with the Tourism Association of Vancouver Island (TAVI) to email information about the purpose of the survey and to provide the survey link to their stakeholder database. A follow-up reminder was emailed out as well via TAVI. In addition, all three sets of focus group participants were sent a thank you email with the survey link as were other potential respondent contacts provided by Steering Committee members and contacts the consultants have through their own in-house sources. A set of prizes were offered as incentive to complete the survey. The "grand prize" for an Accent Inns Canucks package was drawn on March 26th, 2009. The remaining prizes (donated by Mount Washington Alpine Resort, Tigh-Na-Mara Seaside Spa Resort and Conference Centre and Wickaninnish Inn) were drawn on Thursday April 9th, 2009 and all winners have been notified.

3. Regional Tourism Market Overview

In this Section, we provide an overview of geographic and tourism market information for the Vancouver Island/Coast Tourism Region. We also provide information on recent trends in the tourism market.

Overall Vancouver Island has experienced growth in visitation, albeit with some slowing and even dropping off in 2008, with the same anticipated for 2009. It is to be noted that not all data is available for 2008 at the time of finalizing this report.

3.1. Geographic Area

The Vancouver Island tourism region is a large, sparsely populated area, encompassing Vancouver Island, the Gulf Islands as well as a portion of the mainland. Vancouver Island itself is a large and diverse island, 460 kilometres in length and 80 kilometres in width at its widest point. It has one of the world's most diverse ecosystems, including: rainforests, marshes, meadows, beaches, mountains, oceans, rivers and lakes all of which combined create habitats for many different wildlife species. The region is known as one of the world's premier locations for golf, whale watching and birding, as well as salmon and trout fishing. Greater Victoria is the largest urban population on Vancouver Island. Other major cities on Vancouver Island include Nanaimo, Port Alberni, Parksville, Courtenay, and Campbell River. Saltspring Island is the largest and most developed of the Gulf Islands.

The Vancouver Island tourism industry has evolved according to the island’s history, geography, topography and climate. Victoria is the capital city of British Columbia and one of the province’s most noteworthy tourist destinations, attracting more than 3.65 million visitors a year who inject over one billion dollars into the local economy. Downtown Victoria is the urban core for Greater Victoria area residents and tourists alike, providing tourist accommodation, activities and entertainment including accommodation properties to suit all budgets and needs, restaurants and pubs, night clubs, theatres, museums, attractions and special events, including national and international sports events. Victoria also has a convention centre as well as a cruise ship port.

The Vancouver Island mountain ranges run most of the length of the island, dividing the island into a wet and rugged west coast and a drier, more rolling east coast. Located near the centre of Vancouver Island are Strathcona Provincial Park and Mount Washington Alpine Ski Resort, both of which are among the central area’s most significant attractions. Mount Washington has been known to have the largest snow pack of all the ski resorts in British Columbia. In 2007 Mount Washington increased its night skiing product and in recent years the resort has also expanded its off-season facilities to incorporate various summer activities, including mountain biking, hiking, and chair lift rides to scenic vantage points. Mount Washington Alpine Resort is the largest tourism industry employer in the central island area which helps to significantly counter-balance the otherwise off-season of most tourism businesses around Courtenay/Comox as well as the Parksville/Qualicum area.

The west coast shoreline is rugged and in many places mountainous and is known for the natural beauty of its fjords, bays, and inlets. Pacific Rim National Park and the two nearby communities of Tofino and Ucluelet have grown to become international tourist destinations, attracting visitors from all over Canada, North America and around the world. They come to enjoy the scenery and outdoor activities such as sportsfishing, kayaking, hiking, surfing, whale watching and more. The tourism product supply in this area has expanded and upgraded very significantly in recent years and now offers an extensive range of accommodation choices from backcountry camping to five star resorts and hotels in secluded locations. The remoteness of Vancouver Island's west coast combined with often wet weather conditions significantly impact the seasonality of tourist visitation and related employer staffing needs. However, the local industry has worked hard to extend the shoulder season by turning such potential disadvantages into "advantages" and promoting activities such as "storm watching" as a viable year-round tourist activity.

The climate on Vancouver Island is the mildest in Canada and areas along the east coast north of Victoria and extending as far as Campbell River are highly appealing to retirees from all over Canada. The long stretches of beach around Parksville, Qualicum and Courtenay have attracted holiday visitors of all ages for decades. In these communities too there has been considerable updating and new development of tourism product including accommodation, resorts and spas, golf courses and real estate condominium developments which provide additional holiday-time accommodations for tourists.

The natural beauty and tranquillity of the Vancouver Island tourism region has long been a draw for artists and artisans. Galleries, studios and shops selling unique, locally produced arts and crafts are found in many population centres, particularly on the Gulf Islands. Victoria, with its numerous souvenir shops, is also a popular shopping destination for visitors. Nanaimo is a shopping hub for Island residents and tourists travelling the Island north/south.

The area of Vancouver Island north of Campbell River is the most remote and hence the least populated and developed. Popular north island communities frequented by visitors include Telegraph Cove and Alert Bay. This area of Vancouver Island is popular for sports fishing, nature and wildlife viewing and aboriginal tourism experiences.

Marine transport is essential to Vancouver Island for access to the mainland of British Columbia and Washington. BC Ferries serves both Island residents and visitors and is a significant employer throughout the region. There are major terminals at Swartz Bay, south of Victoria and Nanaimo, which connect the Island to the mainland at Vancouver. Port Hardy at the northern tip of Vancouver Island is the jumping off point for tourists travelling to northern BC via the BC Ferries marine highway to Prince Rupert.

Victoria International Airport is the largest airport on Vancouver Island. The only other international airport on the island is situated in Comox. The recent expansion of this airport has benefited the local and regional tourism industry by providing direct connections to/from Calgary via WestJet. Other smaller airports on Vancouver Island include Nanaimo harbour and Campbell River. The Victoria inner harbour is also home to high volumes of floatplane and helicopter traffic.

Note that throughout the report, due to availability of data, we will provide statistical data and projections and other information pertaining to the Vancouver Island/Coast Development Region. The geographic boundaries of tourism regions and development regions in the province are shown in Appendix IV.

3.2. Visitation Trends

In terms of visitor origin, British Columbians and other Canadians comprise the largest visitor market for Vancouver Island tourism and hospitality operators. This suggests that the area may be less impacted by the current global recession than other B.C. regions which attract greater proportions of international visitors. During difficult times, British Columbians, like everyone, are likely to cut back on their travel expenditures until the economy improves, and travel closer to home. Hence, there is some cautious optimism among Vancouver Island operators that the region may ride the recession without huge drops in holiday visitation. Business travel, on the other hand, has already experienced a noticeable downturn.

The *2008 Tourism Vancouver Island Visitor Exit Survey* indicated that visitors to the tourism region originate as follows:

- 45% from other parts of British Columbia
- 26% from other provinces
- 19% from the United States
- 10% from other international countries

- Statistics Canada data on customs entries to *all* of British Columbia showed a drop of nearly 12% in total US visitors during 2008 compared to 2007. Other international markets to the province declined the same year but not as drastically: Asia/Pacific (-.6%) and Europe (-1.4%).

- Industry feedback has provided further insight to the fact that international and especially American visitor volume has similarly been on the decline on Vancouver Island.

- For the Vancouver Island tourism region, total international customs entries exhibited a steady growth pattern between 2000 and 2006 (i.e. +25% over the 6 year period). However this trend reversed in 2007 when there was a *decrease* of 6.1% compared to 2006, for a total of 765,984 international entries.

- The number of visitor parties stopping at Vancouver Island Visitor Information Centres decreased by 11.6% in 2008 over 2007. This is likely a direct reflection of the decline in international visitors, as they seem to the most likely to utilise these types services.

- US/Canada land border crossing changes come into effect on June 1, 2009. Passport ID will be required as part of a "Western Hemisphere Travel Initiative" to help ensure border security. This travel restriction is expected to further hinder growth from the US visitor market, especially in the short term.

- Overall, total tourist visitation on Vancouver Island is expected to decrease 4% to 6% in 2009, according to industry sources.

3.3. Transportation Indicators

All modes of transportation to Vancouver Island have shown overall growth in recent years, with some drop in 2008, which ties in with Vancouver Island tourist/visitor volume trends.

- In 2007, nearly 17 million passengers were transported on BC Ferries' Vancouver Island routes. The levels of passenger volume were fairly constant from 2000 to 2007 with an average annual growth rate of 0.1%. Unconfirmed data suggests 2008 passenger volumes were down at least 3% over 2007 levels.

- There was considerable variation in passenger volume at the airports on Vancouver Island when comparing 2008 to 2007. In Victoria and Nanaimo, the airports experienced very positive growth of 3.8% and 10.7% respectively, yet Comox and Campbell River both had declines of 2%.

- Between 2007 and 2006, Comox airport showed 30% growth in passenger volume.

3.4. Accommodation Trends

Vancouver Island has experienced growth and expansion of its product supply since the start of the decade. Accommodation revenue, property and room supply data provide indicators of this trend.

- Accommodation revenue data, available through B.C. Stats, shows the trend in revenue growth started to turn in 2008, which is when the U.S travel market really showed signs of starting to falter.

- 2008 annual room revenue for Vancouver Island actually dropped 3.9%, while it grew just slightly for B.C. as a whole (+.4%).

Figure 1: Vancouver Island and British Columbia Annual Room Revenue and Percent Change, 2001-2008 ($ thousands)

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Vancouver Island	245,346	258,306	268,641	273,067	295,246	310,195	324,624	351,536	337,826
% Change		5.3%	4.0%	1.6%	8.1%	5.1%	4.7%	8.3%	-3.9%
British Columbia	1,442,901	1,474,160	1,506,360	1,485,670	1,590,956	1,688,343	1,815,312	1,967,921	1,976,673
% Change		2.2%	2.2%	-1.4%	7.1%	6.1%	7.5%	8.4%	0.4%

Source: British Columbia Tourism Room Revenues, B.C. Stats

- Room revenue on Vancouver Island demonstrated continuous growth from 2000 to 2007 with an average annual growth rate of 5.3%. When 2008, the only year it dropped, is factored into the average the annual rate of growth is 4.15%.

- Room revenue data shows revenue growth on Vancouver Island was greater than the provincial average during the first few years of the decade, then followed closely with the provincial trend until 2007.

- Vancouver Island room revenues in 2008 fell nearly 4% over 2007 while provincial room revenues for the same period grew just .4%. Input from the focus group participants indicates that Victoria area tourism and hospitality operators were the ones on Vancouver Island experiencing the greatest visitor and revenue challenges last year.

Figure 2: Vancouver Island and British Columbia Annual Accommodation Property Inventory and Percent Change, 2001-2008

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Vancouver Island	597	598	599	604	626	625	633	609	n/a
% Change		0.2%	0.2%	0.8%	3.6%	-0.2%	1.3%	-3.8%	
British Columbia	2,422	2,473	2,493	2,499	2,553	2,567	2,542	2,501	n/a
% Change		2.1%	0.8%	0.2%	2.2%	0.5%	-1.0%	-1.6%	

Source: B.C. Stats

- The strength in the Vancouver Island accommodation revenue trend has also been a function of increasing average room rates during years when visitor demand was strong.

- Despite upgrades to the product supply, the data shows there have been just moderate increases in the total number of accommodation properties available on Vancouver Island since the start of the decade. Areas of product growth include the west coast (Ucluelet/Tofino area), Parksville and Comox/Courtenay areas.

- In certain geographic pockets of Vancouver Island, however, such as the Parksville/Qualicum, also known as the Oceanside tourism area, there has been growth. More new product is projected and this will impact labour needs, however it will depend on the economic climate in the next few years. Potentially, two to three new properties could be added to the Oceanside area specifically.

- Data from the 2008 British Columbia Approved Accommodation Guide suggests that hotels and motels account for over three quarters (76.6%) of the total regional accommodation capacity for Vancouver Island.

- More properties are classified as Inns and Bed & Breakfasts and cottages in the Vancouver Island tourism region than in any other tourism region in the province. In total, these categories comprise 61.6% of all accommodation facilities in the region, but only 13.9% of the total regional accommodation capacity. The large proportion of small-scale facilities that populate Vancouver Island and the Gulf Islands contributes greatly to the accommodation profile of the region.

Figure 3: Vancouver Island and British Columbia Annual Accommodation Room Inventory and Percent Change, 2001-2007

Room Inventory	2000	2001	2002	2003	2004	2005	2006	2007	2008
Vancouver Island	18,153	18,151	17,770	18,005	18,570	18,611	19,030	18,460	n/a
% Change		0.0%	-2.1%	1.3%	3.1%	0.2%	2.3%	-3.0%	
British Columbia	93,729	97,016	97,340	96,922	100,315	101,945	102,556	100,714	n/a
% Change		3.5%	0.3%	-0.4%	3.5%	1.6%	0.6%	-1.8%	

Source: British Columbia Tourism Room Revenue, B.C. Stats

- There has been only a slight increase in the number of rooms available on Vancouver Island since 2000. Again, it is expected that the number of rooms will increase (up to 600 additional rooms in the Oceanside area alone), once the economy rebounds.

4. Employment Projections

In evaluating tourism labour market conditions, it is first important to realize that tourism is not a stand-alone industry in the standard industry classification. Tourism activities span over a number of industries and as such tourism employment refers to the sum of employment in a number of industries.

There are at least two different ways of measuring tourism employment. Statistics Canada at the national level and at the provincial level the BC Stats define the tourism sector as one which “includes a number of different industries that directly sell goods and services to tourists. These include some types of retailers (e.g., food stores, general merchandise stores, gas stations, RV dealers, clothing stores, and small retailers who sell souvenirs and other gift items to visitors)”, as well as some in the transportation sector, some in the amusement and recreation industries, many in accommodation and food services industries, and some in other industries such as telecommunication services and auto repair services (Hallin, 2008). Since not all businesses in these industries serve tourists exclusively, only some of the total employment in these industries can be attributed to tourism activities.

There are issues regarding this way of measurement. There may be different ways of defining a tourist. Also to consider is the way shares in each of the above industries should be defined as attributing to tourism activities. Currently BC Stats allocates shares in each of the related industries in the following manner, with revisions made in 2007 (Hallin, 2008):

- For transportation, the tourist proportion of passenger air transportation was reduced from just under 100% to 95%, bringing it more in line with ratios used in other jurisdictions.
- The tourist proportion of passenger rail transportation was increased from 86% to 92%.
- For public passenger transit, the tourist proportion was increased from less than one percent to 3.5%.
- For retail trade, the tourist proportion for food and drug stores was reduced from 12.5% to 7.5%.
- For clothing stores, there was also a reduction, from 10% to 7%.
- In the accommodation industry, the tourist proportion for campgrounds was reduced to 95%. (And the shares in other types of accommodation arrangement attributed to tourists remain unchanged.) However, campgrounds account for a very small percentage of total industry output, so the effect of this change on the overall numbers is minimal.

- For food and drinking places, the tourism proportions in use were reduced to 22.5% for full and limited service restaurants and drinking places. For other types of food services (which includes caterers plus mobile food services), the tourist share was reduced to 10%, since this industry primarily serves local residents.
- In amusement and recreation, the ratio for theatrical and staged entertainment was increased to 20% to account for regional shows throughout BC where most of the paying audience is tourists. Similarly, the golf course proportion was increased to 24.5%, based on information obtained from the BC Golf Association.
- For car and truck rentals, the tourism proportion was reduced to 70% to account for local usage of these services.
- The ratio for university and college education was reduced to 0.4%.

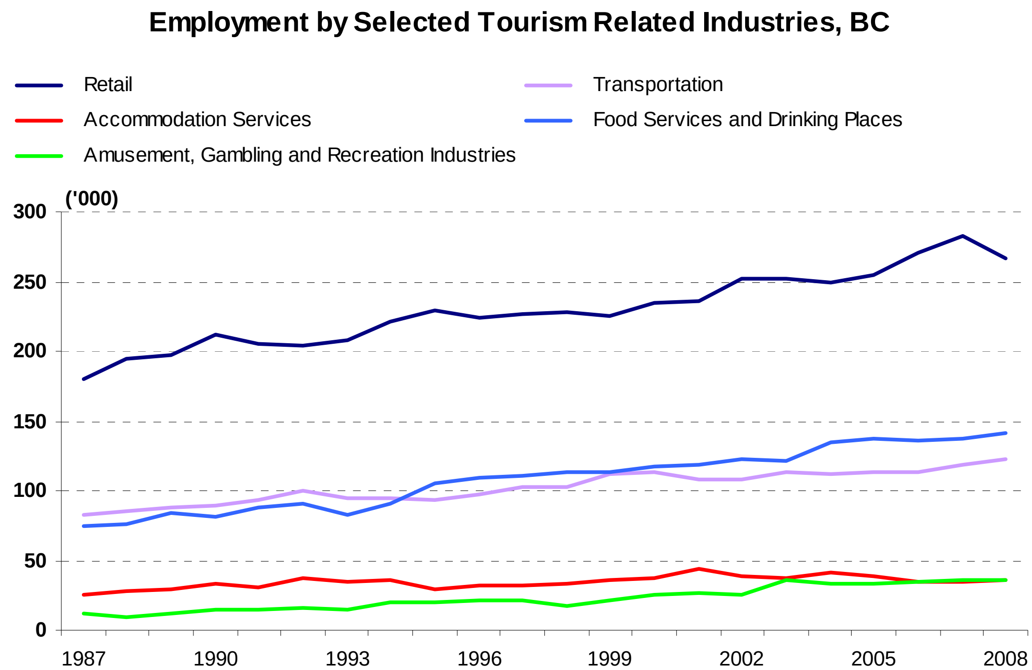
Unfortunately a similar method to assess tourism employment level on a sub-provincial basis is not possible due to lack of regional level data in GDP and employment. Also, from a human resources planning perspective, differentiating a worker in the same industry depending on whether he serves a tourist or a local resident is misleading. This is because the skills acquired are mostly transferrable, and as such it is reasonable to estimate tourism employment focusing on industries and occupations that are core to tourism activities. This is also a method consistent with that utilized in two previous regional labour market studies completed in 2006 and 2007 for tourism regions in British Columbia.

For the purposes of this report, we will focus our analysis on the core industries of accommodation, food and beverage services, as well as amusement and recreation. Other industries that are closely related to serving tourists are retail trade and transportation. For occupational analysis, we will concentrate on key occupations in these industries serving tourists.

4.1. Core Tourism Employment in 2008

Within BC between the years of 2000 and 2008, overall employment growth in the economy was at an average growth rate of 2.3% per year. Employment growth of these core tourism related industries varied. The one that has experienced strongest growth is Amusement, Gambling, and Recreation Services, at an annual growth rate of 5.0%. Next is the Food and Beverage Services, at an annual growth rate of 2.4%. Employment growth in the other three industries (Retail Trade, Transportation, and Accommodation Services) is lower than the provincial average. In fact, the Accommodation Services industry experienced a slight decline in overall employment at the rate of 0.4% per year. Actual employment in these industries is shown in Figure 4.

Figure 4:



Source: LFS, Statistics Canada

At the development region level, employment detail by industry is not available. Instead, the following Figure makes comparison of employment growth in selected industries in the Vancouver Island/Coast Development Region and the BC total.

Figure 5: Employment in Core Tourism Industries, Vancouver Island/Coast Development Region and BC

	2000	2008	2000 to 2008	
			Growth	Average Annual %
	(in '000)			
Vancouver Island/Coast				
Trade	52.8	62.4	9.6	2.1%
Transportation and warehousing	13.9	19.4	5.5	4.3%
Information, culture and recreation	14	15.7	1.7	1.4%
Accommodation and food services	27	35.1	8.1	3.3%
BC				
Trade	300.8	354.8	54	2.1%
Transportation and warehousing	116.9	128	11.1	1.1%
Information, culture and recreation	98.5	118.1	19.6	2.3%
Accommodation and food services	154.5	178.1	23.6	1.8%

Source: LFS, Statistics Canada

It should be noted that industry aggregation shown in Fig. 5 is broader than those shown in the previous Fig. 4, due to availability of data.

In estimating occupational employment for the region, our starting point is the estimated number of employed by occupation for Development Regions in the province, through BC Stats' Regional Employment Projection Model (REPM) (BC Stats, 2007). Our estimate of total employment in core tourism occupations in the Vancouver Island/Coast region in 2008 was 81,400, an increase of 3.1% over 2007. Such growth of employment of the same core tourism related occupations in the Vancouver Island/Coast region was a reverse of the slight decline it experienced from 2006 to 2007, at 0.3%.

In 2008, occupations in Accommodation and Food Services industries experienced strongest employment growth, while those occupations mainly employed in the Trade industry experienced decline in employment. Those occupations in Transportation and Warehousing, as well as those in Information, Culture and Recreation experienced fairly modest employment growth.

Information gathered regarding the tourism industry on Vancouver Island during the course of this research study back up the above-noted trends. Accommodations experience growth in employment when new properties are built, although there may also be a moderate increase in employment when properties are upgraded or expanded. The market analysis showed slight growth in the accommodation supply, as well as increase in the diversity of product with a trend for many hotels to add spa facilities. There is some potential for future growth anticipated once the economy returns to a steady visitor growth pattern. Our study participants in the food and beverage sector identified the primary source of employment growth to be coming from "quick-service" types of establishments. Many of these operators have in fact been experiencing staff shortages.

4.2. Employment Projections to 2011

Figure 6 provides the occupation detail for projected employment level in each of the core tourism related occupations to year 2011.

For estimated employment in 2009, the current economic down turn that is occurring globally and its resulting negative impact on employment in essentially every industry has been taken into account.

Figure 6: Estimated Employment and Projections for Core Tourism Occupations in All Industries, Vancouver Island/Coast Region, 2006 to 2015

	Employed	Projections									Average Annual Growth	
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2006/11	2011/15
A211.0621 Retail Trade Managers	10,660	10,929	10,683	10,633	10,761	10,920	11,081	11,244	11,402	11,571	0.5%	1.5%
A221.0631 Restaurant and Food Service Managers	3,220	3,068	3,328	3,254	3,264	3,288	3,312	3,337	3,359	3,385	0.4%	0.7%
A222.0632 Accommodation Service Managers	1,740	1,679	1,807	1,764	1,766	1,776	1,787	1,797	1,806	1,817	0.4%	0.6%
B316.1226 Conference and Event Planners	270	270	287	286	290	294	299	304	309	314	1.7%	1.6%
F154.5254 Program Leaders and Instructors in Recreation and Sport	1,530	1,544	1,537	1,532	1,545	1,562	1,579	1,596	1,612	1,630	0.4%	1.1%
G011.6211 Retail Trade Supervisors	1,470	1,505	1,448	1,441	1,459	1,481	1,503	1,526	1,548	1,571	0.1%	1.5%
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	800	779	855	849	865	884	904	925	945	967	2.0%	2.3%
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	90	89	97	96	98	100	102	105	107	110	2.2%	2.2%
G211.6421 Retail Salespersons and Sales Clerks	15,840	16,210	15,655	15,585	15,767	15,994	16,224	16,457	16,683	16,923	0.2%	1.4%
G311.6611 Cashiers	7,040	7,131	7,005	6,971	7,060	7,171	7,284	7,399	7,510	7,628	0.4%	1.6%
G411.6241 Chefs	1,040	1,010	1,111	1,103	1,123	1,147	1,173	1,198	1,223	1,250	2.0%	2.2%
G412.6242 Cooks	5,370	5,235	5,755	5,715	5,819	5,948	6,081	6,217	6,349	6,491	2.1%	2.2%
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	700	678	746	741	755	772	789	807	825	844	2.0%	2.2%
G512.6452 Bartenders	1,230	1,195	1,334	1,324	1,349	1,379	1,410	1,442	1,473	1,506	2.3%	2.2%
G513.6453 Food and Beverage Servers	6,370	6,171	6,812	6,763	6,889	7,048	7,210	7,376	7,538	7,711	2.0%	2.3%
G715.6435 Hotel Front Desk Clerks	870	841	931	924	942	964	986	1,009	1,032	1,056	2.1%	2.3%
G721.6441 Tour and Travel Guides	370	342	357	355	361	368	375	382	390	397	-0.1%	1.9%
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)	280	276	280	279	282	284	287	290	292	295	0.3%	1.0%
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	210	209	193	192	194	196	198	200	202	204	-1.4%	1.0%
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	330	329	321	320	323	327	331	335	339	343	-0.2%	1.2%
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	200	188	221	219	223	229	235	241	247	253	2.8%	2.5%
G93.666 Cleaners	11,640	11,444	12,054	12,017	12,220	12,467	12,718	12,974	13,223	13,487	1.4%	2.0%
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	7,920	7,803	8,539	8,530	8,733	8,977	9,225	9,480	9,730	9,996	2.5%	2.7%
Total of Selected Occupations	79,190	78,923	81,355	80,893	82,086	83,576	85,094	86,641	88,143	89,747	1.1%	1.8%

Source: REPM; RKA

In looking at the overall economic picture, the following points come from the Tourism Industry Association of Canada (TIAC):

- Economy has been "drawn into the vortex of recession"(OECD)
- The present forecast for international tourism by the United Nations World Tourism Organization – between 0% and -2% growth for 2009.
- International tourism could reach -3% if economy continues to falter.

Focus group participant discussions offered the following in assessing tourist activity trends and employment impact of the current recession on their region:

- People travel closer to home, including domestic travel. Vancouver Island has a robust BC and Canadian tourism market, so expect that Canadian travellers will help to alleviate the international declines. Ontario is unlikely to grow.
- Certain segments of travel, including Visiting Friends and Relatives (VFR), repeat visitors and independent travel are likely to be more resilient to economic conditions.
- People will still travel, but their trips will be more economical. Camping may see some growth.
- Visitors stay for shorter periods of time.
- Visitors spend less.
- Travelers book later, waiting for the best offers and delaying the decision to travel until they are comfortable with the cost.
- Price is a determining factor with most travelers, but even more so during a recession.
- Destinations offering value to consumers – through pricing, adding value to the experience, and favorable exchange rates – will have a distinct advantage.
- Cost containment will be crucial for tourism businesses in the coming months as companies ensure that they are able to compete on price and value.
- Partnerships with other tourism businesses that attract similar demographics and are complementary to the service offering are an important way to add value to the tourism experience.

Based on our research and input from focus group participants as well as the on-line survey, we are presenting our projections as follows. Detailed notes on the techniques used to derive these numbers are presented in Appendix VI at the back of the report.

Overall, employment in core tourism occupations in 2009 is estimated at 80,900 in the Vancouver Island/Coast region, a decline of 0.6% over year 2008.

It is also expected that overall employment in core tourism industries will grow by 1.5% in 2010, and 1.8% in 2011. This is in part due to modest increases in tourism activities from visitors who come for the 2010 Vancouver/Whistler Olympic Games, and in part due to possible improvement in the global economic environment.

Between 2006 and 2011, the total increase in core tourism occupations is expected to be about 4,400. Among all these occupations, Food Counter Attendants, Kitchen Helpers and Related Occupations are expected to see the largest increases in employment growth, for about 1,100 positions. Food and Beverage Servers, and Cooks are also expected to see an employment growth of about 700 and 600 respectively over the same period. The many positions resulting from these occupations are due to the fact that these are fairly large occupations in size and as such are able to generate many new positions, even at modest growth rates.

The occupations that are expected to experience the highest average annual growth rates between 2006 and 2011 include Other Attendants in Accommodation and Travel (e.g. hotel guest services attendants) (2.8% per year), Food Counter Attendants, Kitchen Helpers and Related Occupations (2.5% per year), and Bartenders (2.3% per year). The reason behind such stronger than average annual growth rates of these occupations is because they all experienced almost the highest employment growth between 2007 and 2008.

4.3. Projecting Ahead to 2015

Tourism activities are expected to further pick up their pace between 2011 and 2015, as global economic conditions should continue to improve from the current downturn. It is also possible that British Columbia tourism as a whole will benefit from increased tourism activities as a result of the 2010 Winter Olympic Games.

On the other hand, some of the focus group participants also indicated that the current economic downturn could mean little or no employment growth in tourism activities for three to four years, as travel for pleasure expenditure is generally discretionary in nature.

Consequently, we project that overall employment of core tourism occupations will increase from 83,600 in 2011 to 89,700 by 2015, at an average growth rate of 1.8% per year. This is shown in Fig. 6.

Among all core tourism occupations, Food Counter Attendants, Kitchen Helpers and Related Occupations, Other Attendants in Accommodation and Travel (e.g. hotel guest services attendant), are again expected to experience the strongest employment growth. However, the latter occupation is very small in size, and as such total number of openings for Other Attendants in Accommodation and Travel over this period is expected to be 24, or six new positions per year.

Because of their large occupational size, Food Counter Attendants, Kitchen Helpers and Related Occupations, Retail Sales Clerks, Food and Beverage Servers are occupations that are expected to generate the largest number of openings amongst these core tourism occupations.

One occupation that requires further explanation is the Cleaners. By itself, this is the second largest occupation in size, after Retail Salespersons. Between 2006 and 2011, it is expected that there will be a total growth of approximate 830 new openings, and between 2011 and 2015, a total of 1,020. This is a fairly broad occupational group, including persons who perform light duty, heavy duty, and also specialized cleaning work. Hotel housekeeping staff are also included in this occupational group. It is noted that about 20% in this occupational group work in the Accommodation and Food Services industry.

We have, in Figure 7 that follows, shown our estimates of employment by core tourism related occupation in the core tourism related industries. For this purpose, we have included the industries of Retail Trade, Transportation, Amusement, Gambling and Recreation, Accommodation Services, and Food Services and Drinking Places.

Figure 7: Estimated Employment and Projections for Core Tourism Occupations in Core Tourism Related Industries, Vancouver Island/Coast Region, 2006 to 2015

	Employed	Projections									Average Annual Growth	
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2006/11	2011/15
A211.0621 Retail Trade Managers	8,291	8,500	8,308	8,270	8,369	8,492	8,618	8,745	8,868	8,999	0.5%	1.5%
A221.0631 Restaurant and Food Service Managers	3,122	2,974	3,227	3,155	3,165	3,188	3,211	3,236	3,257	3,282	0.4%	0.7%
A222.0632 Accommodation Service Managers	1,522	1,468	1,580	1,543	1,545	1,553	1,562	1,572	1,579	1,589	0.4%	0.6%
B316.1226 Conference and Event Planners	36	36	38	38	39	39	40	41	41	42	1.7%	1.6%
F154.5254 Program Leaders and Instructors in Recreation and Sport	904	913	908	905	913	923	933	943	953	963	0.4%	1.1%
G011.6211 Retail Trade Supervisors	1,272	1,302	1,253	1,247	1,262	1,282	1,301	1,321	1,340	1,360	0.1%	1.5%
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	750	730	802	796	811	829	848	867	886	907	2.0%	2.3%
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	66	65	71	70	72	73	75	77	78	80	2.2%	2.2%
G211.6421 Retail Salespersons and Sales Clerks	12,775	13,073	12,626	12,569	12,716	12,899	13,085	13,273	13,455	13,648	0.2%	1.4%
G311.6611 Cashiers	6,466	6,550	6,434	6,403	6,484	6,586	6,690	6,795	6,897	7,006	0.4%	1.6%
G411.6241 Chefs	958	930	1,023	1,016	1,034	1,056	1,080	1,103	1,127	1,151	2.0%	2.2%
G412.6242 Cooks	4,901	4,778	5,253	5,216	5,311	5,429	5,551	5,674	5,795	5,925	2.1%	2.2%
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	681	659	726	721	734	751	768	785	802	821	2.0%	2.2%
G512.6452 Bartenders	1,133	1,101	1,228	1,220	1,242	1,270	1,299	1,328	1,357	1,387	2.3%	2.2%
G513.6453 Food and Beverage Servers	6,198	6,004	6,628	6,580	6,703	6,857	7,015	7,177	7,334	7,503	2.0%	2.3%
G715.6435 Hotel Front Desk Clerks	870	841	931	924	942	964	986	1,009	1,032	1,056	2.1%	2.3%
G721.6441 Tour and Travel Guides	119	110	115	114	116	118	121	123	125	128	-0.1%	1.9%
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)	181	178	181	180	182	183	185	187	189	191	0.3%	1.0%
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slc	208	207	191	190	192	194	196	198	200	202	-1.4%	1.0%
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	262	261	255	254	257	260	263	266	269	272	-0.2%	1.2%
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	176	166	194	193	197	202	207	212	217	222	2.8%	2.5%
G93.666 Cleaners	3,007	2,956	3,114	3,104	3,157	3,221	3,285	3,351	3,416	3,484	1.4%	2.0%
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	6,969	6,866	7,513	7,505	7,684	7,898	8,117	8,341	8,561	8,795	2.5%	2.7%
Total of Selected Occupations	60,866	60,668	62,598	62,214	63,125	64,269	65,435	66,624	67,777	69,011	1.1%	1.8%

Source: RKA

4.4. Seasonal Employment

Seasonality in the tourism industry is one of the most significant employment issues for employers and employees alike. Typically, for most tourism operators in the Vancouver Island tourism region, summers are busier and require more staff, while winters are much quieter. This is mostly due to weather conditions and the enjoyment of outdoor activities. Inevitably, most employers are faced with the decision of letting some staff go during the off-season. This is because either their business is closed or slows down to such a point that it is not economically feasible to maintain peak season staffing levels. This situation adds further to the challenge of finding suitable, qualified staff in the first place and in time for the peak periods. Often, tourism and hospitality business “lose” good people because of the seasonality factor, i.e. their staff from one season either move out of the area or find alternate employment elsewhere when the season with them ends.

The severity of the seasonality factor on Vancouver Island varies somewhat by area of the island. For the most part, Victoria has the most diversified tourism sector because of the corporate and government business it attracts year-round but especially during the otherwise “off-season”.

The central area around Comox/Courtenay is able to balance its seasonality issues somewhat because of the fact that the ski resort of Mount Washington is close by and its peak season is opposite that of coastal and other central tourism businesses. Skier volume at Mount Washington has been growing steadily and the mountain has plans for further expansion of its services and facilities. The ski season most often starts in early/mid-December and continues until early/mid April depending on snow conditions. While historically Mount Washington has enjoyed some of the best ski conditions in the province, low snow pact in some of the recent years have made for shorter, less lucrative ski seasons. The tourism and hospitality businesses in the Comox valley feel the negative impact of any drops in skier visits during the winter months. Mount Washington has worked hard with other businesses in the area to deal with the seasonality issue. The complementary seasons of the ski business with the rest of the tourism sectors makes it possible for some Mount Washington staff to find almost full-time employment in the area. Specifically, Mount Washington works with resorts and golf courses in the area to refer and share staff. This approach is mutually beneficial to both employers and employees alike.

On western and northern Vancouver Island the tourist season is limited by the weather. These areas as well as Parksville/Qualicum and Nanaimo do what they can to stretch their shoulder season into early spring and fall but still rely most heavily on visitor traffic during the peak months of July and August.

In the Table that follows, we make use of available statistical data from the Labour Force Survey to develop seasonal patterns for core tourism related occupations in the Vancouver Island/Coast Region. While data in the columns showing a seasonality pattern in 2007 for the region, the same pattern did not recur throughout the years in which the data we have reviewed. Therefore, for estimating a potential seasonality pattern for future years, we have derived our result based upon monthly non-seasonally-adjusted employment data for occupational groups in the region over the period of 1995 to 2008.

Even though seasonality exists in the core tourism related occupations in parts of the region as described in previous paragraphs, overall employment in the region is heavily weighed towards employment in Victoria and surrounding areas, in which case seasonality is less of an issue. Overall the data indicates that in summer months, employment tends to be about two to three percent higher than average annual employment, while in the winter time, seasonality is related to increased economic activities during the Christmas season. Employment during the winter season was especially strong in 2007, but when we look at more long term data, the seasonality is minimal, at one percent of the yearly average workforce.

On the other hand, we note that even though overall employment levels did not show substantial change during the summer months, actual hours worked do increase, indicating that employers deal with seasonality by way of changing the hours by staff as opposed to cutting staff when business is less busy.

Figure 8: Estimated and Projected Seasonal Employment for Core Tourism Occupations in Core Tourism Related Industries, Vancouver Island/Coast Region, 2007 and 2011

	2007 Average	Seasonal Added - Summer	Seasonal Added - Winter	2011 Average	Seasonal Added - Summer	Seasonal Added - Winter
A211.0621 Retail Trade Managers	8,500	40	334	8,492	59	102
A221.0631 Restaurant and Food Service Managers	2,974	74	109	3,188	112	0
A222.0632 Accommodation Service Managers	1,468	28	0	1,553	0	0
B316.1226 Conference and Event Planners	36	1	1	39	1	0
F154.5254 Program Leaders and Instructors in Recreation and Sport	913	23	34	923	33	0
G011.6211 Retail Trade Supervisors	1,302	12	102	1,282	18	31
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	730	36	54	829	58	0
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	65	2	0	73	0	0
G211.6421 Retail Salespersons and Sales Clerks	13,073	123	1,028	12,899	178	309
G311.6611 Cashiers	6,550	62	515	6,586	91	158
G411.6241 Chefs	930	46	68	1,056	74	0
G412.6242 Cooks	4,778	237	351	5,429	383	0
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	659	33	48	751	53	0
G512.6452 Bartenders	1,101	55	81	1,270	90	0
G513.6453 Food and Beverage Servers	6,004	298	441	6,857	484	0
G715.6435 Hotel Front Desk Clerks	841	32	0	964	0	0
G721.6441 Tour and Travel Guides	110	4	0	118	0	0
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)	178	7	0	183	0	0
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	207	0	0	194	0	0
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	261	10	0	260	0	0
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	166	6	0	202	0	0
G93.666 Cleaners	2,956	112	0	3,221	0	0
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	6,866	260	0	7,898	0	0
Total of Selected Occupations	60,668	1,501	3,167	64,269	1,634	599

Source: RKA

4.5. Replacement Needs

One last source of labour demand that we will discuss here is due to attrition, that is, replacement needs due to workers' leaving the labour force, for reasons such as retirement or going back to school for further education and training or disability. Note that this does not include replacement needs due to staff turnover.

As the workforce in tourism related occupations tends to be younger compared to the general workforce, (we will discuss this further in the next Section on labour supply,) replacement needs due to attrition are relatively modest. In the Table below, we have presented potential number of job openings in these occupations in core tourism related industries that are due to attrition needs.

Figure 9: Estimated Number of Openings Due to Attrition for Core Tourism Occupations in Core Tourism Related Industries, Vancouver Island/Coast Region, 2009 to 2015

	2009 to 2015	
	Attrition Rate	Number
A211.0621 Retail Trade Managers	2.7%	1,619
A221.0631 Restaurant and Food Service Managers	2.7%	613
A222.0632 Accommodation Service Managers	2.7%	298
B316.1226 Conference and Event Planners	3.6%	10
F154.5254 Program Leaders and Instructors in Recreation and Sport	0.9%	58
G011.6211 Retail Trade Supervisors	1.9%	176
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	1.9%	115
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	1.9%	10
G211.6421 Retail Salespersons and Sales Clerks	1.8%	1,624
G311.6611 Cashiers	1.1%	525
G411.6241 Chefs	1.1%	80
G412.6242 Cooks	1.1%	413
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	1.2%	64
G512.6452 Bartenders	1.2%	107
G513.6453 Food and Beverage Servers	1.2%	577
G715.6435 Hotel Front Desk Clerks	2.2%	155
G721.6441 Tour and Travel Guides	2.2%	19
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)	2.1%	28
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	2.1%	29
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	1.7%	31
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	1.8%	26
G93.666 Cleaners	3.1%	725
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	1.2%	691
Total of Selected Occupations	1.7%	7,992

Source: COPS, RKA

The attrition rates we show here are based upon the total number of replacement needs for all occupations between 2005 and 2015 in the province, derived from the Canadian Occupational Projections System (COPS). We have applied attrition rates for these occupations on the projected number employed in these occupations in core tourism related industries each year to arrive at the total number of job openings due to attrition.

The occupations that are expected to generate the largest number of jobs due to attrition are Retail Sales Managers and Retail Sales Clerks. The attrition rate for managers is higher than average because of the age profile of these managers as well as the size of the occupation. For Salespersons, the large attrition needs are the result of the large size of the occupation, even though the attrition rate for the occupation is similar to the average for all occupations in this group.

In sum, the total number of job openings in core tourism related occupations in core tourism related industries for the region over the years of 2009 to 2015 is summarized in Figure 10 below.

Figure 10: Estimated Number of Total Job Openings Due to Growth and Attrition for Core Tourism Occupations in Core Tourism Related Industries, Vancouver Island/Coast Region, 2009 to 2015

	Growth and Attrition Total 2009 to 2015
A211.0621 Retail Trade Managers	2,347
A221.0631 Restaurant and Food Service Managers	739
A222.0632 Accommodation Service Managers	344
B316.1226 Conference and Event Planners	14
F154.5254 Program Leaders and Instructors in Recreation and Sport	116
G011.6211 Retail Trade Supervisors	289
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	225
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	20
G211.6421 Retail Salespersons and Sales Clerks	2,703
G311.6611 Cashiers	1,128
G411.6241 Chefs	216
G412.6242 Cooks	1,121
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	164
G512.6452 Bartenders	275
G513.6453 Food and Beverage Servers	1,500
G715.6435 Hotel Front Desk Clerks	287
G721.6441 Tour and Travel Guides	32
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)	38
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	41
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	49
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	56
G93.666 Cleaners	1,105
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	1,981
Total of Selected Occupations	14,790

Source: RKA

5. Labour Supply Issues

As with other industries and with tourism activities elsewhere in BC and Canada, the question is how to obtain the labour supply that is needed to allow for industry growth.

We have shown, in Section 4, that over the period from 2009 to 2015, a total of 14,790 job openings are projected to be available in the Vancouver Island/Coast region for the core tourism related occupations in core tourism related industries. This translates to about 2,100 positions per year on average.

In this section, we first present information regarding general demographic trends in the Vancouver Island/Coast region, and also population migration patterns in the region. We then discuss sources of labour supply in the tourism industries. We will also discuss factors impacting labour supply in the industries.

5.1. Demographic Aspects

The demographics of those working in the tourism sector are somewhat different from the overall workforce. Youth, those of ages between 15 and 24, account for 15% in the overall workforce in BC, those in the core working age population (age 25 to 44) account for over two-thirds, while older workers (those aged 55 and over) represent about 17% of the overall workforce.

For the Vancouver Island/Coast region, it is a similar age profile for the general workforce. Youth accounts for 15%, those in the core working age population account for two-thirds, and older workers account for 19% of the overall workforce.

For those in the core tourism related occupations we are studying, youth represent almost a third, while that group of workers in the Vancouver Island/Coast region account for a slightly larger proportion than the BC average (32% vs. 31%). This is shown in Figure 11.

Figure 11: Age Profile of Tourism Workforce, BC and Vancouver Island/Coast Region – Youth

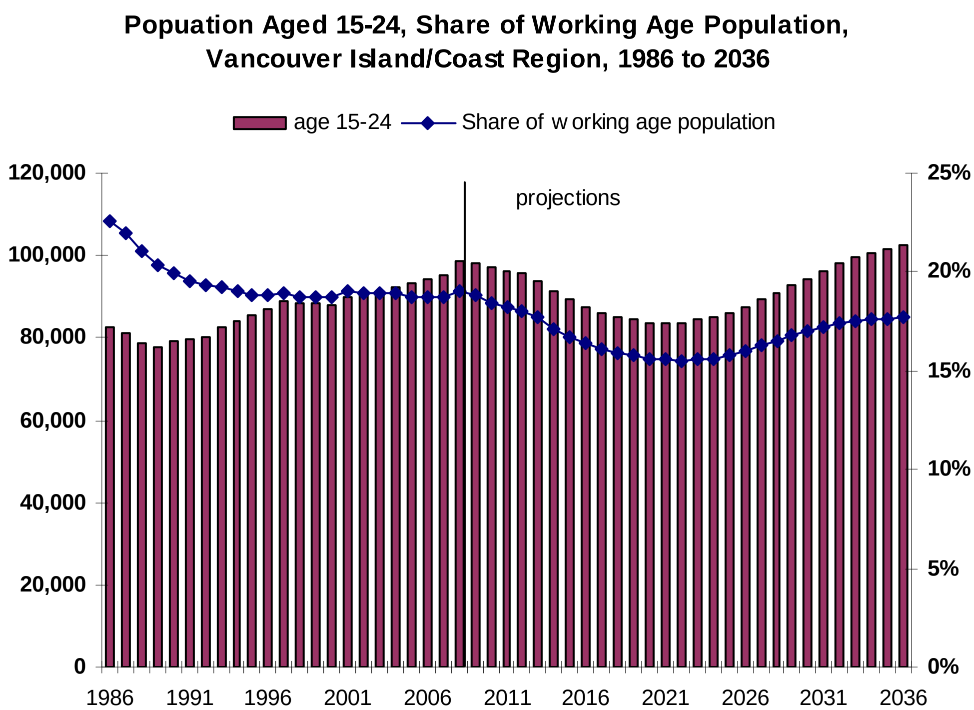
	BC	Van. Island /Coast
A211 Retail trade managers	6%	6%
A221 Restaurant and food service managers	8%	9%
A222 Accommodation service managers	4%	4%
B316 Conference and event planners	11%	18%
F154 Program leaders and instructors in recreation, sport and fitness	40%	36%
G011 Retail trade supervisors	21%	18%
G012 Food service supervisors	44%	45%
G013 Executive housekeepers	4%	0%
G211 Retail salespersons and sales clerks	33%	33%
G311 Cashiers	48%	50%
G411 Chefs	14%	10%
G412 Cooks	35%	37%
G511 Maîtres d'hôtel and hosts	77%	69%
G512 Bartenders	31%	26%
G513 Food and beverage servers	48%	48%
G715 Hotel front desk clerks	30%	33%
G721 Tour and travel guides	20%	21%
G722 Outdoor sport and recreational guides	15%	23%
G723 Casino occupations	12%	8%
G731 Operators and attendants in amusement, recreation and sport	41%	36%
G732 Other attendants in accommodation and travel	33%	52%
G93 Cleaners	14%	15%
G961 Food counter attendants, kitchen helpers and related occupations	60%	66%
Total of Selected Occupations	31%	32%

Source: Statistics Canada, 2006 Census

Comparing individual occupations in the list, there is generally not much difference between those in the Vancouver Island/Coast region and in BC. The only occupations where younger workers in the Vancouver Island/Coast region account for an even higher percentage than BC are Outdoor Sports and Recreation Guides, Other Attendants in Accommodation and Travel, and Food Counter Attendants, Kitchen Helpers and Related Occupations.

The emphasis in the tourism sector on using younger workers in many of the core tourism related occupations has particular concern at this time. As we know, wider employment growth across all industries in the region, along with an aging population, means that there will be many openings for young people in the region in the long run. On the other hand, youth population in the region, as is the case in BC, are declining both in absolute number and in percentage of the working-age population (defined as those aged 15 to 64), as shown in Figure 12. This demographic reality is not expected to improve until after 2020.

Figure 12:



Source: BC Stats, Population Estimates & Projections, PEOPLE 33

This trend will have major implications for availability of workers overall and specifically for the tourism jobs that young people have traditionally filled. The direct impact on the tourism industry is that there will be fewer workers for the less skilled, volume jobs, which currently have a high proportion of workers aged 15 to 24, often students. To some extent work in these jobs, especially filling summer job openings, has been compatible with the school and work patterns for those in early years of post-secondary education. But the competition for the same pool of labour is increasing. This makes it even more important for the industry to have a long term plan to meet potential labour requirements.

Compared to the core tourism related workforce in the province, those in the region see an even smaller proportion in the age 25 to 54 cohort, due to the fact that the workforce has a higher than average share in both youth workers and older workers.

Figure 13: Age Profile of Tourism Workforce, BC and Vancouver Island/Coast Region – Core Working Age Population

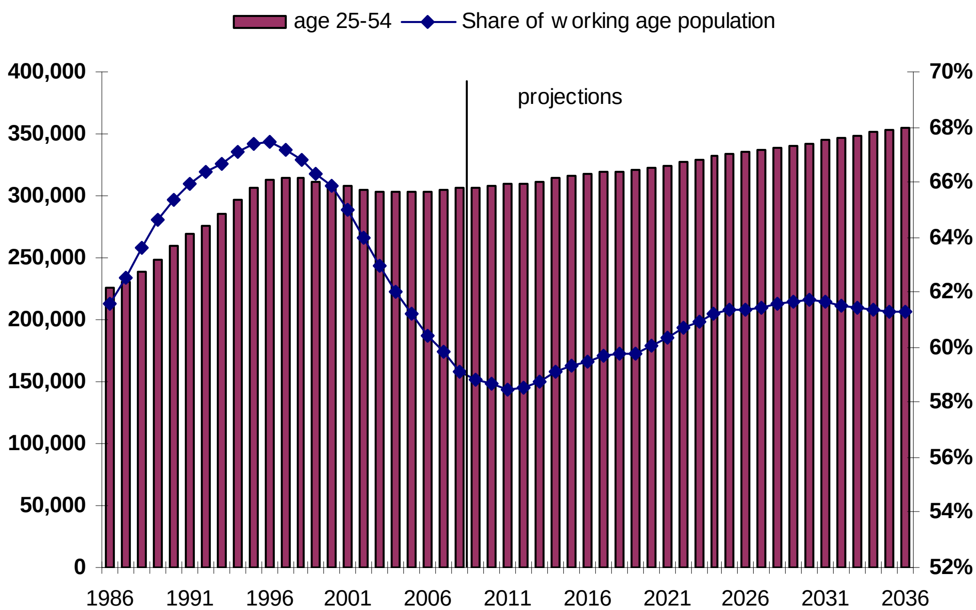
	BC	Van. Island /Coast
A211 Retail trade managers	74%	70%
A221 Restaurant and food service managers	78%	73%
A222 Accommodation service managers	67%	60%
B316 Conference and event planners	82%	71%
F154 Program leaders and instructors in recreation, sport and fitness	53%	55%
G011 Retail trade supervisors	71%	74%
G012 Food service supervisors	50%	46%
G013 Executive housekeepers	82%	70%
G211 Retail salespersons and sales clerks	51%	48%
G311 Cashiers	45%	41%
G411 Chefs	76%	81%
G412 Cooks	54%	52%
G511 Maîtres d'hôtel and hosts	19%	22%
G512 Bartenders	61%	68%
G513 Food and beverage servers	49%	48%
G715 Hotel front desk clerks	61%	61%
G721 Tour and travel guides	62%	68%
G722 Outdoor sport and recreational guides	65%	61%
G723 Casino occupations	81%	84%
G731 Operators and attendants in amusement, recreation and sport	39%	47%
G732 Other attendants in accommodation and travel	61%	45%
G93 Cleaners	63%	62%
G961 Food counter attendants, kitchen helpers and related occupations	33%	29%
Total of Selected Occupations	56%	53%

Source: Statistics Canada, 2006 Census

In the long run this pool of labour in the region is still increasing in absolute number, but its share in the core working-age population is declining. It will gradually increase from about 58% in 2011 to about 62% by 2030 before falling again. This is shown in Figure 14. What this means for the tourism and hospitality industry is that to keep those workers with experience and desire to stay in the sector, the industry must do a better job and devise more effective strategies to attract and retain its employees.

Figure 14:

Popuation Aged 25-54, Share of Working Age Population, Vancouver Island/Coast Region, 1986 to 2036



Source: BC Stats, Population Estimates & Projections, PEOPLE 33

Older workers in the region account for a larger than average proportion in the core tourism related workforce, compared to the province. This is shown in Figure 15. In the region, this is especially true with certain occupations: Retail Trade Managers, Restaurant and Food Services Managers, and Conference and Event Planners. However, the occupations where older workers account for much higher than the provincial average share include those working as Accommodation Service Managers (37% vs. 29%) and Executive Housekeepers (30% vs. 13%).

Another occupation, though not unique to the region, where older workers account for almost one in five in the occupation, is that of cleaners (including house-keeping staff in accommodation services). In some cases, the industry must prepare itself for when these older, experienced workers retire and need to be replaced. While young workers may have the energy and potential to develop long-term careers in tourism and hospitality, it seems that many do not have the much-needed attitude, willingness and work-ethic which older, more mature workers often possess. This is consistent with information we gathered from industry sources via the focus groups, online survey and follow-up telephone interviews.

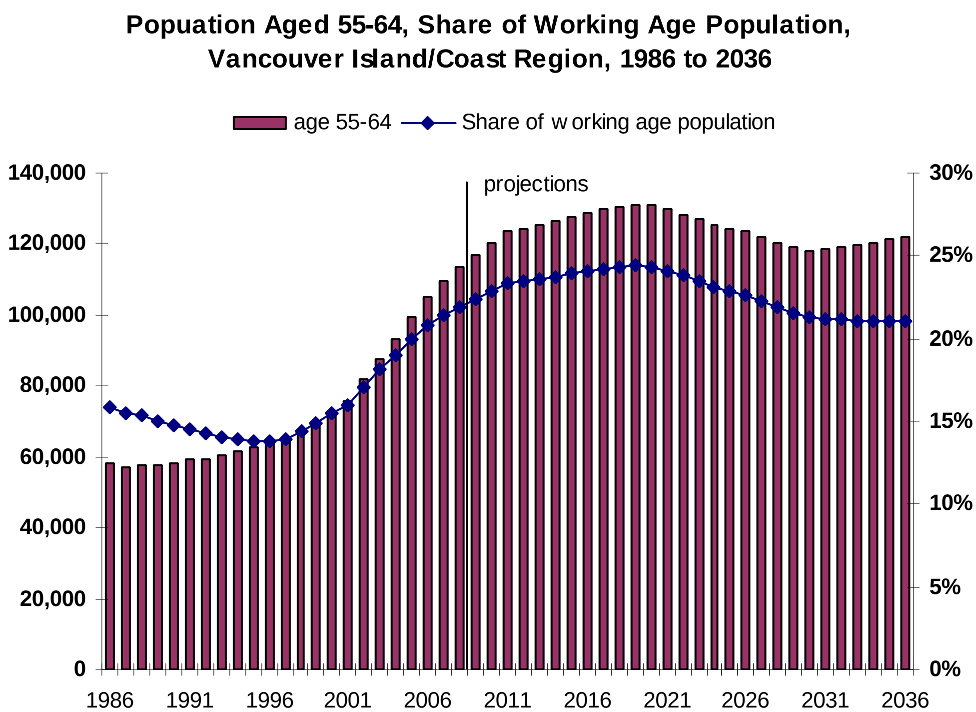
Figure 15: Age Profile of Tourism Workforce, BC and Vancouver Island/Coast Region – Older Workers

	BC	Van. Island /Coast
A211 Retail trade managers	19%	23%
A221 Restaurant and food service managers	14%	18%
A222 Accommodation service managers	29%	37%
B316 Conference and event planners	8%	12%
F154 Program leaders and instructors in recreation, sport and fitness	7%	9%
G011 Retail trade supervisors	8%	8%
G012 Food service supervisors	5%	9%
G013 Executive housekeepers	13%	30%
G211 Retail salespersons and sales clerks	15%	18%
G311 Cashiers	7%	9%
G411 Chefs	9%	9%
G412 Cooks	11%	11%
G511 Maîtres d'hôtel and hosts	4%	10%
G512 Bartenders	7%	5%
G513 Food and beverage servers	3%	4%
G715 Hotel front desk clerks	9%	5%
G721 Tour and travel guides	18%	11%
G722 Outdoor sport and recreational guides	20%	16%
G723 Casino occupations	7%	10%
G731 Operators and attendants in amusement, recreation and sport	19%	16%
G732 Other attendants in accommodation and travel	7%	0%
G93 Cleaners	22%	23%
G961 Food counter attendants, kitchen helpers and related occupations	7%	5%
Total of Selected Occupations	13%	15%

Source: Statistics Canada, 2006 Census

Figure 16 below shows that for the region, the pool of labour in the 55 to 64 age cohort will continue to rise in the near future until at least 2020, before starting to decline afterwards. As a share of the overall working-age population, older workers will continue to increase to account for almost one in four workers of this population in the region by 2020.

Figure 16:



Source: BC Stats, Population Estimates & Projections, PEOPLE 33

This has important implications for tourism sector employers. There needs to be a long term strategy to keep older workers in the workplace longer and to even recruit more older workers to the workplace in order to help alleviate the pressure of the labour shortage.

5.2. Potential Labour Force Growth to 2015

In this section, we develop a labour force growth model to show potential size of the labour force for those tourism-related occupations under analysis in our study. The purpose is to show that, given population growth patterns projected of the three major age cohorts in the previous section, and based on historic labour force participation patterns amongst males and females in the general population in different age groups, what the size of the occupational groups would likely be in the years up to 2015. Then we will be able to decide whether there are any labour supply-demand gaps over the period under analysis, among various occupations.

From population growth by age group data we presented in the previous section, we further apply gender and age specific labour force participation rates to arrive at the potential labour force of those aged 15 to 24, aged 25 to 54, and aged 55 to 69 in the Vancouver Island/Coast Development Region. We have obtained these gender and age specific labour force participation rates from a 2007 BC Stats study entitled *British Columbia Labour Force Participation Rate Projections to 2031*. Specifically, we made use of labour force participation rates in 2006, and projected rates in 2011 and 2016.[1] Rates for the years in between have been derived by simple interpolation. Thereafter, we have used 2006 Census data to derive occupational distribution of the labour force in the region, and applied the same occupational shares to the estimated and projected labour force in the region to arrive at labour force growth of occupations we are studying to 2015. We have also made minor adjustments to ensure the consistency between the Census data and labor force averages for the year. Figure 17 below presents our estimates and projections of the labour force by occupation in the region in 2007 and 2008, and from 2009 onwards.

[1] We have also added the labour force growth for those aged 70-74. For this age group we have assumed that their labour force participation rates are half of those for those aged 65-69 years.

Figure 17: Estimated and Projected Labour Force by Core Tourism Occupation in Vancouver Island/Coast Region, 2006 to 2015

	Estimated Labour Force		Projections							
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
A211 Retail trade managers	11,126	11,262	11,440	11,565	11,704	11,819	11,897	11,972	12,071	12,155
A221 Restaurant and food service managers	3,361	3,397	3,446	3,478	3,513	3,541	3,561	3,578	3,603	3,623
A222 Accommodation service managers	1,816	1,846	1,883	1,911	1,942	1,969	1,986	2,003	2,023	2,041
B316 Conference and event planners	282	284	289	291	293	294	296	296	297	298
F154 Program leaders and instructors in recreation, sport and fitness	1,597	1,611	1,642	1,652	1,657	1,661	1,663	1,660	1,654	1,648
G011 Retail trade supervisors	1,534	1,546	1,567	1,577	1,586	1,593	1,598	1,600	1,605	1,608
G012 Food service supervisors	835	842	861	866	867	868	868	865	859	854
G013 Executive housekeepers	94	95	97	98	100	101	102	102	104	105
G211 Retail salespersons and sales clerks	16,533	16,723	17,089	17,242	17,349	17,439	17,492	17,491	17,449	17,426
G311 Cashiers	7,348	7,415	7,588	7,633	7,642	7,648	7,648	7,613	7,542	7,488
G411 Chefs	1,086	1,094	1,107	1,114	1,122	1,129	1,133	1,137	1,145	1,150
G412 Cooks	5,605	5,657	5,771	5,809	5,831	5,848	5,857	5,848	5,824	5,806
G511 Maîtres d'hôtel and hosts	731	738	759	764	762	762	760	754	742	732
G512 Bartenders	1,284	1,293	1,313	1,319	1,325	1,328	1,331	1,330	1,330	1,329
G513 Food and beverage servers	6,649	6,698	6,839	6,868	6,868	6,864	6,860	6,825	6,763	6,713
G715 Hotel front desk clerks	908	915	931	935	938	939	940	939	936	933
G721 Tour and travel guides	386	390	396	399	401	403	404	405	406	406
G722 Outdoor sport and recreational guides	292	295	301	303	305	307	308	309	309	310
G723 Casino occupations	219	221	223	225	227	228	229	230	232	233
G731 Operators and attendants in amusement, recreation and sport	344	348	356	359	361	362	363	363	362	361
G732 Other attendants in accommodation and travel	209	210	215	215	215	214	214	213	210	208
G93 Cleaners	12,149	12,298	12,521	12,653	12,784	12,894	12,965	13,021	13,084	13,141
G961 Food counter attendants, kitchen helpers and related occupations	8,267	8,336	8,556	8,594	8,573	8,555	8,536	8,464	8,331	8,229
Total of Selected Occupations	82,655	83,511	85,194	85,867	86,345	86,732	86,967	86,954	86,787	86,682

Source: RKA

There are limitations to this model, the biggest of which is our assumption that occupational shares within the labour force remain constant at 2006 levels. It is realistic to think that as economic activities grow in the region, individuals will make changes to their occupational (career) choices over the years. In any case, Figure 17 presents the likely size of the total labour supply in these occupations in the region.

In the following sections 5.3 through 5.8, we further discuss various factors and issues that could potentially change the flow and therefore the pool of labour supply.

5.3. Mobility and Labour Supply

Recruitment of tourism and hospitality staff has added costs when employers are forced to seek employees outside their immediate geographic area. However, both the results of the online survey and the input from the focus group participants indicate that the majority of tourism and hospitality staff on Vancouver Island originate and reside in the local and regional communities. The survey data shows the local/regional labour market provides up to 80% of labour needs for many businesses. Victoria and the other urban centres on the island are the most likely to benefit from reasonably sized and diverse urban labour pools. Smaller, remote communities like the west coast of Vancouver Island have a much smaller resident population to draw from. The may appeal as a popular place to live for short-term, transient workers, assuming they can find suitable accommodation for themselves.

Geographic Sources of Employees

	Response Average
Local/regional community	81.91%
Other parts of Vancouver Island	9.11%
Other parts of British Columbia	4.42%
Other parts of Canada	2.64%
Internationally	1.92%
Total	100%
N=97	

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

Most staff hired by tourism and hospitality businesses on Vancouver Island already have some work or career experience. They were either already employed by another business in the same industry or have been working in another industry all together. These two categories represent nearly 45% of employees hired in the last year, according to the online survey. Students still studying (i.e. and planning to back to school or university) account for 29% and graduates from tourism/hospitality training programs represent approximately 7%.

Source of Employees for Vancouver Island Tourism and Hospitality Employers

	Response Average
% Student still studying	28.82
% Employed at another tourism organization	23.04
% Employed in another industry	19.66
% Graduate of a tourism/hospitality training program	6.84
% Previously unemployed	11.88
% Other	9.77
Total	100
N=85	

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

Another important labour supply issue has to do with where workers come from. In addition to relying upon youth workers for many of the lesser skilled volume jobs, the region has also a higher than provincial average share of interprovincial migrants in these jobs.

Interprovincial migrant information from the 2006 Census refers to persons who moved into the area (in this case, the Vancouver Island/Coast Development Region) from 2001 to 2006 from another province or territory within Canada. Information on external migrants from the 2006 Census indicates movers from outside of Canada, usually immigrants. While such information gives a picture of who in the workforce had moved into the area and were still there in 2006, it does not measure the movement year by year of workers who might come for a period of time and then move away. Despite this gap, these mobility measures do give a sense of the extent of migration from outside the area, especially when compared to the BC average data.

In Figure 18 that follows, we show the percentage of the core tourism related occupations that were migrants from interprovincial or international sources, to give an indication of reliance in these occupations on utilization of these migrants.

Figure 18: Labour Force Mobility Status Indicators for Tourism Workforce, BC and Vancouver Island/Coast Region

	Interprovincial BC	International BC	Interprovincial Van. Island /Coast	International Van. Island /Coast
A211 Retail trade managers	5%	4%	4%	2%
A221 Restaurant and food service managers	4%	4%	6%	1%
A222 Accommodation service managers	9%	5%	7%	4%
B316 Conference and event planners	7%	8%	8%	3%
F154 Program leaders and instructors in recreation, sport and fitness	6%	3%	7%	2%
G011 Retail trade supervisors	4%	3%	4%	1%
G012 Food service supervisors	3%	5%	4%	1%
G013 Executive housekeepers	6%	2%	5%	0%
G211 Retail salespersons and sales clerks	5%	5%	7%	2%
G311 Cashiers	3%	6%	5%	3%
G411 Chefs	6%	7%	8%	6%
G412 Cooks	5%	5%	7%	3%
G511 Maîtres d'hôtel and hosts	4%	3%	5%	0%
G512 Bartenders	9%	3%	13%	2%
G513 Food and beverage servers	7%	6%	9%	3%
G715 Hotel front desk clerks	10%	8%	13%	6%
G721 Tour and travel guides	7%	5%	8%	8%
G722 Outdoor sport and recreational guides	3%	4%	4%	4%
G723 Casino occupations	4%	8%	4%	0%
G731 Operators and attendants in amusement, recreation and sport	4%	2%	4%	0%
G732 Other attendants in accommodation and travel	4%	4%	7%	0%
G93 Cleaners	3%	5%	5%	2%
G961 Food counter attendants, kitchen helpers and related occupations	4%	7%	6%	2%
Total of Selected Occupations	5%	5%	6%	2%

Source: Statistics Canada, 2006 Census

Overall, the core tourism occupations in the region show a marginally higher reliance on interprovincial migrants than the provincial average, but a lower reliance on international migrants. The 5% of international migrants in the core tourism workforce at the provincial level is reflective of the large number of immigrants working in these occupations in the Lower Mainland.

Information presented in the Figure shows that even though as a percentage of the overall workforce, interprovincial migrants account for only 6% in the region, this source of labour supply is nevertheless an important one. The region being able to attract such a level of interprovincial migrants is probably due to the fact that people are willing to move to the region for its natural scenery and the availability of educational facilities. On the other hand, fewer international migrants move there to work in these jobs probably because of the high cost of living (particularly in Victoria). During our focus group discussions, industry sources reported that the pool of labour that traditionally used to fill housekeeping jobs from immigrants is no longer available, due to the cost of living.

One might argue that there may be more interprovincial migration within the youth population, because they tend to travel more frequently. Data in the following Figure 19 does not appear to support that. While it is true that there is a higher share of interprovincial migration for the entire workforce in the region, it is not the case for those working in tourism related jobs. It implicates that although the youth population is more mobile, there were also other industries that took more of the interprovincial movers.

Figure 19: Labour Force Mobility Status Indicators for Tourism Workforce, BC and Vancouver Island/Coast Region – Youth (Age 15 to 24)

	Interprovincial BC	International BC	Interprovincial Van. Island /Coast	International Van. Island /Coast
A211 Retail trade managers	9%	3%	10%	3%
A221 Restaurant and food service managers	6%	4%	12%	0%
A222 Accommodation service managers	13%	4%	0%	0%
B316 Conference and event planners	9%	9%	17%	0%
F154 Program leaders and instructors in recreation, sport and fitness	5%	2%	7%	2%
G011 Retail trade supervisors	5%	2%	0%	0%
G012 Food service supervisors	2%	4%	0%	0%
G013 Executive housekeepers	0%	0%	0%	0%
G211 Retail salespersons and sales clerks	5%	4%	7%	2%
G311 Cashiers	3%	5%	5%	2%
G411 Chefs	8%	4%	10%	0%
G412 Cooks	5%	5%	8%	2%
G511 Maîtres d'hôtel and hosts	3%	2%	4%	0%
G512 Bartenders	10%	4%	8%	4%
G513 Food and beverage servers	6%	5%	8%	3%
G715 Hotel front desk clerks	9%	9%	8%	8%
G721 Tour and travel guides	3%	3%	0%	0%
G722 Outdoor sport and recreational guides	16%	10%	15%	0%
G723 Casino occupations	3%	3%	0%	0%
G731 Operators and attendants in amusement, recreation and sport	4%	2%	9%	0%
G732 Other attendants in accommodation and travel	4%	3%	0%	0%
G93 Cleaners	4%	6%	6%	4%
G961 Food counter attendants, kitchen helpers and related occupations	4%	6%	5%	2%
Total of Selected Occupations	5%	5%	6%	2%

Source: Statistics Canada, 2006 Census

Comparing workers in the youth group with workers of all ages in these occupations in the region, there are higher concentrations of interprovincial migrants in these occupations: Retail Trade Managers, Restaurant and Food Services Managers, Conference and Event Planners, and most notably, Outdoor Sport and Recreational Guides.

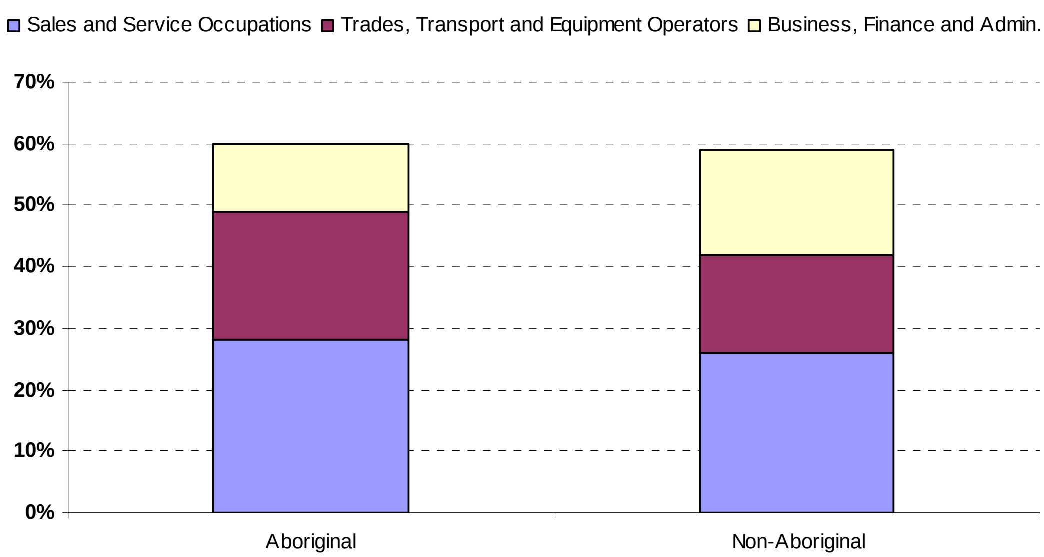
5.4. Aboriginal Peoples

Statistics Canada provides data through the monthly Labour Force Survey on the labour market status of Aboriginal peoples living off-reserve in the four western provinces. However, given that Aboriginal population accounts for only 4.8% of the overall population in BC (based on 2006 Census), the data available from the Labour Force Survey provides only a fairly general picture of labour market status of the Aboriginal population in the province.

In a recent article providing analysis of such data (Stock, 2008), it is shown that the top three occupational groups for Aboriginal peoples in BC are Sales and Service Occupations (28%), Trades, Transport and Equipment Operators (21%), and Business, Finance and Administration (11%). These three occupations account for 61% of the total Aboriginal workforce. For non-Aboriginal population, these three occupations also account for 60% of its overall workforce. However, the distribution of these three occupations among the non-Aboriginal population is quite different. This is shown in Figure 20.

Figure 20:

Top Three Occupational Choice among Aboriginal and Non-Aboriginal Population in BC, 2007



Source: Statistics Canada, Labour Force Survey

Aboriginal peoples are well represented in Sales and Service Occupations, which means that they are well represented in many of the core tourism occupations in our analysis in the report. Also, given that youth accounts for a higher percentage of the Aboriginal population than their non-Aboriginal counterparts, workers of Aboriginal identity are an important source of labour supply in the tourism and hospitality sector. Still, the size of the Aboriginal youth population is too small to make a large impact on the overall labour supply for the industry.

Actively Recruiting or Recruited from Aboriginal Groups

	Response Percent
Yes	18.00%
No	82.00%
N=96	

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

Results from our online survey are consistent with the general picture these data describes. The most types of positions hired in the industry in the region, according to survey respondents, are:

- Housekeeping and laundry,
- Working in culture centres, performing groups (theatre, singing, dancing)
- Craft wholesaling/retailing,
- Tour guides for Aboriginal sites, boat operators,
- Totem pole carvers, canoe makers,
- Food and beverage servers, kitchen help,
- Front desk clerks, and
- Maintenance jobs.

The only exception is where if the property is owned and operated by a band, staff members including general managers, department heads and front line workers are most likely of Aboriginal identify.

5.5. Persons with Disabilities

Our online survey results indicate that only about one in ten tourism businesses in the region actively recruited persons with disabilities.

Actively Recruiting or Recruited from Persons with Disabilities

	Response Percent
Yes	9.00%
No	91.00%
N=96	

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

Total number of persons with disabilities reported hired by respondents was fewer than 60. When averaged across all businesses, this translates to not even one individual per business. The types of positions held by those with disabilities hired in businesses in the sector include, according to survey respondents:

- Housekeeping, cleaning, and housemen,
- Front desk, ticket sales, customer service (such as reservation, switchboard),
- Food and beverage servers, kitchen help, dishwashers,
- Ground maintenance, and
- Spa therapists.

Most of the positions cited by respondents are entry-level, unskilled jobs. Only in two responses it was indicated that they work as a Front Desk Manager, and as a Visitor Counselor.

5.6. Unemployment

Data from the 2006 Census also provide some measures of unemployment for the core tourism occupations in the Vancouver Island/Coast region. It should also be noted though that these unemployment rates are established by an individual reporting he or she being unemployed as of May 2006, and as such the data only provides a snapshot of employment status in the month of May. Because of the seasonality nature of many jobs in tourism, and the summer peak season being from June through September, unemployment rates shown in the Figure below are likely more reflective of the seasonality as opposed to actual unemployment situation.

Figure 21: Unemployment Rates for Core Tourism Occupations, BC and Vancouver Island/Coast Region, 2006

	BC	Van. Island /Coast
A211 Retail trade managers	2.2%	2.1%
A221 Restaurant and food service managers	2.8%	2.8%
A222 Accommodation service managers	5.1%	5.2%
B316 Conference and event planners	11.3%	2.9%
F154 Program leaders and instructors in recreation, sport and fitness	8.7%	7.5%
G011 Retail trade supervisors	3.6%	2.6%
G012 Food service supervisors	3.1%	4.6%
G013 Executive housekeepers	3.4%	5.3%
G211 Retail salespersons and sales clerks	5.4%	4.8%
G311 Cashiers	6.9%	6.8%
G411 Chefs	4.4%	3.3%
G412 Cooks	6.8%	8.3%
G511 Maîtres d'hôtel and hosts	5.9%	6.5%
G512 Bartenders	4.7%	5.5%
G513 Food and beverage servers	5.9%	5.8%
G715 Hotel front desk clerks	5.5%	4.3%
G721 Tour and travel guides	10.2%	6.6%
G722 Outdoor sport and recreational guides	14.5%	17.4%
G723 Casino occupations	2.3%	0.0%
G731 Operators and attendants in amusement, recreation and sport	13.8%	8.5%
G732 Other attendants in accommodation and travel	5.8%	6.7%
G93 Cleaners	5.8%	6.3%
G961 Food counter attendants, kitchen helpers and related occupations	7.3%	6.7%
Total of Selected Occupations	5.6%	5.4%

Source: Statistics Canada, 2006 Census

It should also be noted that not necessarily all unemployed in a specific occupation can be deemed “employable” as some of the unemployed could not find work because of lack of skills or other reasons.

Other information from Statistics Canada’s Labour Force Survey provides a measure of unemployment overall and over time for the region. This information shows that in 2001, the average unemployment rate for the region was 9.2%. By

2006, it dropped to 4.9%. In 2007 when industry sources considered the sector had the strongest employment growth in recent years, the overall unemployment rate in the region was 4.3%. This indicates that at times of strong economic growth in the region, the pool of labour available from the unemployed was limited.

5.7. Foreign Workers

In situations where Canadian citizens and landed immigrants cannot fulfill the needs of labour demand, an employer may need to resort to bringing in workers temporarily from outside the country/ In the province of BC, there are a number of ways for employers in the tourism sector to recruit workers in specific occupations from overseas to meet labour requirements.

According to information available from go2, these following four types of programs are available for tourism employers to draw labour from.

- Temporary Foreign Worker Program. This program is designed to assist tourism operators meet their labour requirements by hiring foreign workers under very specific circumstances and for a limited period of time. The program covers both skilled and unskilled workers and has been amended to help expedite the process for certain occupations where there is a demonstrated shortage of Canadian workers able to perform the work.

- Provincial Nominee Program. This is a joint program administered by Citizenship and Immigration Canada and British Columbia's Ministry of Economic Development. This program is designed to expedite the permanent immigration of foreign skilled workers into Canada. A majority of nominees to this program are currently working in Canada with a temporary work visa.

- International Students Program. This program has a number of variations (Co-operative Education, Work Off-Campus and Post Graduation work visas) all of which are designed to provide international students studying in Canada with relevant work experience while in Canada.

- Working Holiday and Student Work Abroad Programs. These programs are designed to assist young people (usually between the ages of 18-35) in certain countries to come to Canada for a designated period of time to work and holiday and are currently used by a number of resorts in Canada to increase their local labour pool.

Data from the Citizenship and Immigration Canada (CIC) show that the number of entries of temporary foreign workers working in tourism related occupations more than quadrupled between 2000 and 2008 in the province. On an average annual growth basis, this represents a growth rate of 20% per year. Of all the occupations, Light Duty Cleaners, which include housekeeping staff and room attendants, as well as Food and Beverage Servers, increased the most. This is shown in Figure 22. Such data is consistent with our analysis showing substantial labour shortage especially with these occupations within the province (see Section 6 that follows).

Figure 22: Temporary Foreign Worker Entries by Selected Tourism Related Occupation, BC, 2000 to 2008

Occupation	2000	2001	2002	2003	2004	2005	2006	2007	Q1-Q3 2008*	2008 **	Annual Growth Rate
0621 - Retail Trade Managers	18	23	33	25	42	39	39	43	41	55	14.9%
0631 - Restaurant and Food Service Managers Total	14	25	19	18	30	28	43	40	47	63	20.6%
0632 - Accommodation Service Managers	32	34	37	47	70	75	49	55	33	44	4.1%
1226 - Conference and Event Planners	9	--	--	7	--	6	7	14	10	13	5.0%
5254 - Program Leaders and Instructors in Recreation and Sport	341	372	439	398	435	463	499	564	183	244	-4.1%
6211 - Retail Trade Supervisors	--	39	5	--	36	5	15	15	8	11	
6212 - Food Service Supervisors	--	5	--	--	--	15	15	23	45	60	
6213 - Executive Housekeepers	--	--	0	--	--	--	--	--	--	--	
6241 - Chefs	32	32	47	13	24	45	60	40	51	68	9.9%
6242 - Cooks	67	50	80	95	127	160	258	377	472	629	32.3%
6421 - Retail Salespersons and Sales Clerks	29	47	30	24	24	73	56	105	133	177	25.4%
6435 - Hotel Front Desk Clerks	17	19	10	--	29	32	59	76	102	136	29.7%
6441 - Tour and Travel Guides	97	100	73	53	53	43	57	34	33	44	-9.4%
6442 - Outdoor Sport and Recreational Guides	43	38	51	39	11	15	10	10	6	8	-19.0%
6443 - Amusement Attraction Operators and Other Amusement Occupations	50	8	32	39	--	--	0	--	--	--	
6451 - Maîtres d'hôtel and Hosts/Hostesses	--	5	--	--	--	--	--	10	7	9	
6452 - Bartenders	0	--	--	--	--	--	--	5	--	--	
6453 - Food and Beverage Servers	5	6	14	12	17	29	78	188	225	300	66.8%
6641 - Food Service Counter Attendants and Food Preparers	--	--	--	0	--	16	43	184	814	1,085	
6661 - Light Duty Cleaners	5	9	11	5	9	30	59	159	300	400	72.9%
6662 - Specialized Cleaners	--	0	--	0	--	0	--	13	27	36	
6663 - Janitors, Caretakers and Building Superintendents	--	--	--	--	0	--	9	19	34	45	
6671 - Attendants in Recreation and Sport	10	--	6	--	--	--	8	5	8	11	0.8%
6672 - Other Attendants in Accommodation and Travel (Except Airline Travel)	36	33	35	--	7	29	14	12	--	--	
Grand Total	823	863	936	793	935	1,121	1,389	1,995	2,586	3,448	19.6%

Source Citizenship & Immigration Canada, RDM, 21 oct. 08

* 2008 data are approximate and subject to change, the cut used contains data up to the end of Sept. 2008 (end of Q3)

** annualized based on data for the first three quarters of the year.

In total, there were about 4,650 temporary foreign workers in the province in 2008 working in these tourism-related occupations. However, CIC data showing entries of temporary foreign workers with a population centre on Vancouver Island as a destination of interest indicates essentially no entries. These population centres include Courtenay, Campbell River, Parksville, Port Alberni, Nanaimo, Duncan, and Victoria. This does not necessarily mean there are no temporary foreign workers working in these population centres, because some of these entries showing an intended destination other than these population centres may in fact end up working here. The data we have obtained does not allow us to know exactly where they work outside these major cities to draw definite conclusions.

On those admitted to the province under the Provincial Nominee Program (PNP), data we have obtained from CIC also indicates strong growth in recent years. However, the total number is still extremely small, and the concentration of these workers appears to be Chefs and Cooks. There is no sub-provincial data available due to the small size of this category of workers. In 2008, there were altogether 95 persons (principal applicants) admitted to the province in these tourism-related occupations.

Finally, we note that because those admitted into the province under Working Holiday and Student Work Abroad Programs do not need a visa specifying intended occupations, it is possible many of them do work in tourism-related occupations.

The ski tourism sector throughout British Columbia makes good use of the working holiday program for workers in between the ages of 18 and 30. These young people, most often from England, New Zealand or Australia, are interested in a travel adventure that includes a combination of work and pleasure. At Mount Washington, approximately 15% of staff are foreign workers employed either on sponsorship or a working holiday visa.

Altogether, there were about 26,000 individuals in the province in 2008 who could potentially be temporary workers under the category of “Skills Not Stated”. Of this total, those from Australia accounted for 28%, those from Japan accounted for 15%, and those from the UK and Colonies represented another 10%.

5.8. Earnings, Hours and Non-Wage Benefits

Wages and compensation are generally considered to be very important factors when evaluating the availability of labour in any given industry. Both secondary sources and our focus groups indicated that the relatively low wages paid in the tourism industry were a factor in attracting and retaining workers. Employers such as caterers in the government sector which offer better than average wages and working conditions attract and keep a better supply of workers. All are aware that market conditions including price limits on final demand for goods and services provided put a ceiling on wages, but wages also put a ceiling on the supply of available labour.

We do not have statistical data showing the level of compensation for the same occupation in various industries. However, industry sources we have been in touch with have informed us that people working as cooks, servers, and cleaners in the hospitality sector earn lower wages than those working in hospitals, care facilities, and correctional facilities. In many cases, they are not entitled to, or have only limited coverage for, non-wage benefits such as extended health benefits or pension plans.

With respect to working conditions, part-time work, or shift work, as well as long hours during busy times also make work arrangement difficult especially for those with child care issues.

Lack of apprenticing opportunities for cooks is also cited by industry sources as one factor contributing to lack of supply.

A separate area of concern about the filling of these positions in the future is the attitude, work ethic and lack of “life skills” of many young people when they commence entry-level employment. Most tourism and hospitality employers told us that there are many young, relatively inexperienced people desiring higher paying employment yet they do not possess the commitment to work hard and work their way up the ladder while at the same time building the much-needed career and people skills required to be successful in tourism and hospitality and also earn higher wages.

6. Assessing the Balance in the Tourism Labour Market

In this section, we will combine estimated and projected labour demand and labour supply for core tourism occupations in the Vancouver Island/Coast Development Region to derive supply-demand gaps. We will also present qualitative information and analysis we conducted from industry consultation process.

In Figure 23, we present our findings on potential supply-demand gaps among occupations under analysis. Note that in the Figure, a negative value means no gaps for the occupation in the year, while a positive value represents a shortage in labour supply. We further note that even in cases where a negative value (i.e., surplus) exists, this only means there are enough “bodies” to meet labour demand needs.

In general, we have found that for the whole group of core tourism occupations under analysis, labour force growth should meet the needs of labour demand until 2013. After that, an ageing population and its resulting effect of limited labour force growth will mean that even if the industry hires every single individual available to work in that occupation, (therefore meaning zero unemployment), there will be a labour shortage.

For individual occupations within the group, the supply shortages for some appear much earlier than 2014. These include Chefs and Cooks, Food Services Occupations, including Food and Beverage Services, Bartenders, Food Counter Attendants, and Kitchen Helpers. To a less extent, Front Desk Clerks and Conference and Event Planners also show shortfall starting in 2010.

In Figure 24, we express the shortfall as a percentage of labour demand. Here we note that we only show values where there exists a shortage.

We further note that our gaps shown here are fairly conservative and are the minimum values representing such shortages.

Figure 23: Estimated and Projected Supply Gap by Selected Tourism Related Occupation, Vancouver Island/Coast Region, 2006 to 2015

	Estimated Gap		Projections							
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
A211 Retail trade managers	-466	-334	-759	-938	-954	-916	-840	-759	-709	-632
A221 Restaurant and food service managers	-141	-329	-119	-225	-252	-257	-254	-249	-254	-250
A222 Accommodation service managers	-76	-168	-76	-149	-178	-196	-205	-214	-227	-236
B316 Conference and event planners	-12	-15	-1	-5	-3	0	3	7	11	15
F154 Program leaders and instructors in recreation, sport and fitness	-67	-66	-105	-121	-113	-100	-86	-66	-44	-21
G011 Retail trade supervisors	-64	-41	-120	-136	-128	-113	-96	-76	-59	-39
G012 Food service supervisors	-35	-63	-6	-17	-3	16	35	59	85	112
G013 Executive housekeepers	-4	-6	0	-2	-2	-1	1	2	3	4
G211 Retail salespersons and sales clerks	-693	-514	-1,436	-1,664	-1,594	-1,466	-1,296	-1,072	-815	-562
G311 Cashiers	-308	-284	-583	-664	-585	-482	-371	-223	-44	126
G411 Chefs	-46	-84	4	-11	0	18	38	60	77	99
G412 Cooks	-235	-422	-17	-96	-15	97	218	361	515	673
G511 Maîtres d'hôtel and hosts	-31	-60	-13	-23	-8	10	29	53	82	110
G512 Bartenders	-54	-98	21	5	24	51	79	111	142	175
G513 Food and beverage servers	-279	-527	-28	-106	20	182	347	547	770	993
G715 Hotel front desk clerks	-38	-74	0	-11	4	24	46	70	95	122
G721 Tour and travel guides	-16	-48	-39	-44	-40	-35	-30	-23	-17	-10
G722 Outdoor sport and recreational guides	-12	-19	-21	-24	-24	-23	-22	-20	-18	-15
G723 Casino occupations	-9	-12	-31	-33	-33	-33	-32	-31	-31	-30
G731 Operators and attendants in amusement, recreation and sport	-14	-20	-35	-39	-38	-36	-33	-29	-24	-19
G732 Other attendants in accommodation and travel	-9	-22	6	4	9	15	21	28	36	45
G93 Cleaners	-509	-855	-469	-642	-575	-444	-272	-81	96	295
G961 Food counter attendants, kitchen helpers and related occupations	-347	-533	-17	-65	158	418	685	1,010	1,391	1,758
Total of Selected Occupations	-3,465	-4,592	-3,849	-5,004	-4,312	-3,240	-1,990	-472	1,154	2,824

Source: RKA

Figure 24: Estimated and Projected Supply Gap as a % of Labour Demand by Selected Tourism Related Occupation, Vancouver Island/Coast Region, 2006 to 2015

	Estimated Gap as % of Demand	Projections								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
A211 Retail trade managers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
A221 Restaurant and food service managers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
A222 Accommodation service managers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
B316 Conference and event planners	0%	0%	0%	0%	0%	0%	1%	2%	4%	5%
F154 Program leaders and instructors in recreation, sport and fitness	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G011 Retail trade supervisors	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G012 Food service supervisors	0%	0%	0%	0%	0%	2%	4%	6%	9%	12%
G013 Executive housekeepers	0%	0%	0%	0%	0%	0%	1%	2%	3%	4%
G211 Retail salespersons and sales clerks	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G311 Cashiers	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
G411 Chefs	0%	0%	0%	0%	0%	2%	3%	5%	6%	8%
G412 Cooks	0%	0%	0%	0%	0%	2%	4%	6%	8%	10%
G511 Maîtres d'hôtel and hosts	0%	0%	0%	0%	0%	1%	4%	7%	10%	13%
G512 Bartenders	0%	0%	2%	0%	2%	4%	6%	8%	10%	12%
G513 Food and beverage servers	0%	0%	0%	0%	0%	3%	5%	7%	10%	13%
G715 Hotel front desk clerks	0%	0%	0%	0%	0%	3%	5%	7%	9%	12%
G721 Tour and travel guides	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G722 Outdoor sport and recreational guides	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G723 Casino occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G731 Operators and attendants in amusement, recreation and sport	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G732 Other attendants in accommodation and travel	0%	0%	3%	2%	4%	6%	9%	12%	15%	18%
G93 Cleaners	0%	0%	0%	0%	0%	0%	0%	0%	1%	2%
G961 Food counter attendants, kitchen helpers and related occupations	0%	0%	0%	0%	2%	5%	7%	11%	14%	18%
Total of Selected Occupations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	3.1%

Source: RKA

Both the online survey and the focus group discussions included questions around which job occupations are the most likely to experience shortages in the future.

The survey itself showed that over half of respondents said they do have long term concerns regarding the availability of labour to fill some specific tourism and/or hospitality jobs looking towards the year 2015.

The survey respondents and focus group participants were consistent on this issue. Among the occupations of greatest concern are the following:

1. Housekeeping - first and foremost;

2. Culinary staff, specifically cooks (front-line/first), sous chefs and chefs, and

3. Entry level restaurant (i.e. bus people) and kitchen (i.e. dishwashers)

Other occupations frequently mentioned as being difficult to fill and/or hold onto good, qualified staff include:

- Foodservers (the Vancouver Island tourism and hospitality industry is looking for more people who are “qualified/experienced”)
- Front-line staff (including front desk)
- Guides (including boat tour guides)

Looking ahead, the industry expects to continue to be in short supply of people who can fill the following skilled and semi-skilled positions:

- Spa specific jobs such as aestheticians, massage therapists (RMTs)
- Building/yards/equipment maintenance/handyman
- custodial/janitorial and other cleaning positions
- campground operators
- security

There were also several comments regarding the need for the industry to keep up with technology in order to generate its own cost savings, so people who understand tourism and hospitality *and* are technologically *and* marketing savvy are likely to be in high demand in the coming years.

A number of the study’s survey and focus group participants said ALL positions will face pressure once the current economic situation is under control and the economy moves in a more positive and steady direction.

7. Recruitment, Training and Retention Practices Among VI Tourism Operators

The British Columbia tourism industry, with the help of go2, has worked hard to reposition itself as a strong and valuable provider of employment offering long-term job satisfaction and career growth. As such, human resource professionals in the tourism and hospitality industry have become increasingly innovative in their employee recruitment, training and retention practises. These topics were also part of the research of both the focus groups and the online survey.

The majority of tourism and hospitality operators contributing input to this study have experienced challenges in finding the “right staff” at some point in recent years.

7.1. Recruitment

The modern age of technology has offered excellent recruitment opportunities via the internet. A very high percentage (88%) of tourism and hospitality employers uses the internet to recruit employees. The go2 website specifically was mentioned numerous times during meetings. Online websites were referred to by 55% of survey respondents and operators’ “corporate website” was selected as most effective by 33%.

Despite the advances and the huge value in technological recruiting opportunities, word-of-mouth still remains a vital and essential means of finding employees for tourism and hospitality businesses. Employers are working together more than ever before, as evidenced by the “alliance” formed by Mount Washington and its regional resorts, golf courses and tourist attractions. Tourism employers recognize the value of keeping employees employed in a seasonal industry so they are willing and able to work with their employees and other employers to find employment that will complement seasonal periods. Satisfied employees are also an excellent source for referrals, often recommending friends, family and/or other acquaintances who may present a similar work ethic.

Traditional newspaper advertising is used as a recruitment method by just under half the employers surveyed.

Most Effective Ways to Recruit Qualified Employees

	Response Percent
Word-of-Mouth	67.00%
Online websites	55.00%
Newspaper advertising	43.00%
Your corporate website	33.00%
Employment agency	20.00%
Career Fairs	14.00%
Other	11.00%
Not hiring at this time	10.00%
Temporary Foreign Work permit	5.00%
Trade publications	5.00%
Working Holiday Program Work Permit	4.00%
No strategy	2.00%
Provincial Nominee Program	1.00%

N=100

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

7.2. Training

A large part of the success of the tourism and hospitality industry stems around interpersonal experiences and Vancouver Island businesses see the value in training their employees. Almost all tourism and hospitality businesses provide some form of training to their employees, with 90% conducting a general orientation and over 80% providing safety and/or customer service/relations. Nearly 60% say they offer courses/workshops outside of the organization but this is likely only available to select occupations.

Types of Training Offered to Employees

	Response Percent
General orientation	89.60%
Customer service and relations	83.30%
Safety	81.30%
Courses, workshops outside the organization	57.30%
Other	15.60%
No training is provided	3.10%

N=96

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

There were comments provided during the focus groups as well in the survey about the need to improve training opportunities in the tourism and hospitality industry. Specifically, employers are looking for more hands-on experience from graduates out of formal training programs. It was suggested that there should be more government subsidization or education funding for this. Basic training in customer services skills was noted as lacking among young people entering the industry, even those coming out of formal tourism/hospitality training programs. There was discussion about the need to educate young people (during the middle school high school years) about the value and importance of the tourism industry and the essential need for developing positive interpersonal skills to be used in customer service jobs.

Time taken away from other work and the cost of training are usually the biggest concerns employers have with regards to training. Several respondents to the online survey also commented that there are limited training opportunities in the local area for tourism/hospitality training on Vancouver Island. When the topic of employee training was discussed in more detail during the focus groups, specifically in the context of the current recession, several comments were made regarding the need to maintain, and, if possible, upgrade training offering during this time. Having well-trained and enthusiastic employees will not only will help businesses to face tougher competition during a time when guests have more choice, but also potentially provide an opportunity to solidify employers/employee relationships in terms of commitment and loyalty.

In order to retain good staff and to assist with labour shortages from time to time many tourism and hospitality operators participating in this study noted that more than ever they have been “cross-training” their staff. Many staff appreciate the opportunity to learn new skills as well as the increase in hours worked this can offer them. Cross-training and “doing more with less” has become an essential human resource and operational strategy for employers. This is expected to continue.

7.3. Retention

Tourism and hospitality employers have long recognized that their industry’s wages are more often than not, too low. There are, however, many lifestyle and other benefits which do appeal. In order to make compensation more attractive overall, employers on Vancouver Island are attempting to appeal to their employees’ financial needs by offering incentives such as those listed in the following table. The most popular are:

- Staff discounts (on purchases or activities such as golf, skiing, other recreation)
- Extended health and medical
- Parking
- Vacation
- Staff meals

Financial Recruitment and Retention Incentives

	Response Percent
Staff discounts	65.90%
Extended health or dental plans	61.50%
Parking	48.40%
Use of facilities (pool, gym, tennis, restaurants)	37.40%
Vacation accruals	36.30%
Staff meals	34.10%
MSP	33.00%
Paid bereavement	26.40%
Stay bonuses	24.20%
Other	22.00%
Extra vacation time	15.40%
Signing bonuses*	3.30%

* Signing bonuses are most likely to apply to management level personnel only
N=91

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

Non-financial incentives do not provide the obvious monetary return but do still have notable costs associated with them and are meant to generate positive employee job/workplace satisfaction. According to the survey, on Vancouver Island, the most popular non-financial incentives, offered by well over 70% of employers, include:

- Training
- Social activities and events
- Flexible work schedule

Non-Financial Recruitment and Retention Incentives

	Response Percent
Training	79.80%
Staff social events and/or activities	77.70%
Flexible work schedule	74.50%
Birthday recognition	54.30%
Mentoring	45.70%
Long service awards	39.40%
Employment anniversary recognition	30.90%
Other	12.80%

N=94

Source: RKA: Vancouver Island Tourism and Hospitality Human Resource Survey, 2009

8. Potential Labour Market and HR Development Strategies

This study's research has shown that labour market concerns in the tourism and hospitality industry will not disappear during the current economic slowdown. Some issues may not be as severe in the short-term. However, tourism is a people person so the need to fill this industry's occupations with the "right people" will continue to be an essential element of its long term success.

This final section is a summary of the issues and recommendations derived through the study's research and analysis of employment needs and human resource fundamentals for the tourism and hospitality industry on Vancouver Island. Many of the recommendations are virtually direct quotes from the study's participants. Overall, it is clear that in order for the industry to succeed in achieving its goals for long term revenue and employment growth, employees, employers, industry representatives and governments with their agencies must plan, work together and support each other in implementing effective human resource strategies.

Issues and Recommendations for Employees to Address

- Get "life skills"
- Develop "people skills"
- Understand value-for-money
- Learn to love the work
- Have an improved work ethic
- Recognize the value of starting at the bottom of the ladder and working up
- Understand that formal education and training are only a "starting point" to a career
- Appreciate the non-financial benefits of working in the tourism and hospitality industry.

Issues and Recommendations for Employers to Address

- Create a career path for employees.
- Invest in human resource training.
- Develop a culture as a great place to work.
- Make incentives for seasonal workers.
- Demonstrate to young people the benefits of living in a tourist area.
- Ensure there is affordable housing in the nearby community.
- Provide seasonal accommodation in smaller/remote communities.
- Participate in and develop tourism/hospitality industry training, internships and mentorship programs.
- Continue employee training and retention strategies during economic downturn; continue cross-training of staff which benefits employers and employees alike.
- Explore alternative labour markets including: mature workers, people with disabilities, First Nations.
- Understand and support the needs and characteristics of different generations and types of workers.
- Stay current of technological advancements which have the potential to save staffing needs and overall costs, i.e., online bookings have reduced the need for reservationists.

Issues and Recommendations for the Industry to Address

- Educate how exciting and beneficial a career in tourism can be for workers of all ages. For example, a tourism/hospitality job provides excellent entry into the workforce. A well-trained hotel staff person has a multitude of career opportunities worldwide. Older workers can maintain an income and social contact by working part-time in the industry. People with disabilities are a virtually untapped source of employees, while there is room for more Aboriginal people to join the workforce, especially in those non-band-owned operations.
- Elevate the respect for entry-level positions in the tourism market, especially Housekeepers, which are an essential occupation and extremely valuable to

the entire industry. Identify this as a career choice and create recognition, i.e. "Vancouver Island Housekeeper of the Year".

- There are a lot of front line positions, but not a lot of management positions. Managers and supervisor do not get paid enough to keep them in this industry.
- Offer an official certification program to experienced personnel currently working within the industry to challenge a tourism test for each department within Tourism areas and reward with certification equivalent to education if they score well on the test.

<u>Issues for Government and Its Agencies to Address</u>

- Protect the tourism product, i.e. the natural environment.
- Promote and give more discounts to travellers to Vancouver Island.
- Recognize the challenge for those earning minimum wage and continue to provide non-financial benefits which have value and are appreciated.
- The trend is for more of the labour force to be moving off Vancouver Island than moving to the Island and, therefore, employees have more choice than employers. Vancouver Island must be promoted as providing a better lifestyle with comparable wages to the Lower Mainland.
- Provide small business with incentive opportunities that can be used to offset business costs (in the case of the employer) or living costs (in the case of the employee) for entry level positions. Examples – rental/affordable housing contribution.
- Develop more cohesion between high schools, colleges and universities and the tourism sector so the transition and support of co-op placements, apprenticeships and training would be easier to access and more beneficial for the industry. Tourism students need more immersion in the industry.
- Remain active in HR issues despite current economic downturn. The labour shortage will not disappear and the industry will suffer further if it is not addressed.
- Improve foreign worker programs – make them more employer friendly, i.e. provide more streamlined access to foreign workers on a seasonal basis. Applying 18 months in advance for a visa for someone to work for 3 months is unrealistic.

- Adjust immigration practices to create a better balance of skilled and unskilled immigrants (present practice is leaning too heavily on skilled labour).

- Consider a training incentive to keep the youth in smaller communities.

Summary of Issues and Recommendations for Development of Vancouver Island Human Resource Strategies

The research and analysis conducted through the course of this study has shown that the tourism and hospitality industry on Vancouver Island is in need of long term planning and preparation in order to face a growing tourism demand in the facing of a declining local labour supply. Thus, the research and development of a long term human resource strategy for the Vancouver Island tourism region is recommended.

The priority issues to be addressed in the Vancouver Island Tourism and Hospitality Human Resource Strategy are the following:

- **Seasonality** – With the exception of the ski industry, most operators are busier and require more staff during the summer. The shoulder seasons of spring and fall help to extend the season but many staff are laid-off and then must be rehired, often at considerable expense, the following year.

- **Demographics** – Due to falling fertility rates, longer lifespans and the retirement of the baby boomer generation, the number of young people entering the workforce is insufficient to meet the demand for labour in Canada (all industries). Baby boomers are retiring – not only are they helping to push up the demand for tourism and travel but they are also a potential source of labour for the industry.

- **Mobility** – Employers are reliant on a local work-force unless they can offer mobile workers an employee housing situation or nearby community that offers affordable housing and cost of living.

- **Aboriginal Peoples** – This segment is a source of labour supply yet most operators do not actively recruit from this population.

- **Persons with Disabilities** – Most tourism and hospitality operators do not actively recruit from this group.

- **Unemployed** – Due to seasonality, many workers are “unemployed’ during the off-season, including students returning to school. Some others in the unemployed category are not considered employable in the tourism and hospitality industry.

- **Foreign Workers** – The tourism and hospitality industry makes use of foreign workers, most often those on a temporary foreign worker or a working holiday visa.

- **Compensation** – Relatively low wages paid throughout the tourism industry are a significant deterrent to attracting and retaining qualified workers.

- **Attitudes and experience** – Throughout the tourism regions, operators are faced with the challenge of finding employees who have the right attitude, experience and "willingness" to work hard and be successful in the tourism and hospitality industry.

The research and analysis conducted here to date recommends the following strategies for the Vancouver Island Tourism and Hospitality Human Resource Strategy:

1. **Utilize non-traditional labour**, including older workers, Aboriginals and people with disabilities. Employers must understand and create a work environment that suits the needs and characteristics of individual employee groups.

2. **Encourage young people to enter the industry.** Despite a drop in their overall numbers, young people remain a very important source of labour for the tourism and hospitality industry. Employers must continue to develop new and innovative ways to appeal to and attract this segment of the population. By recognising, understanding and working with technology and the other "cultural" characteristics of Generation Y and others within this segment, employers may be able to find untapped potential and develop the much needed work ethic and attitude at the same time. Continued communication and connections with schools is important. An incentive program to keep youth in smaller communities and/or to encourage young people to recruit other youth could be developed.

3. **Tourism must have a voice in matters concerning affordable housing and cost-of-living.** Raising wages alone is not the simple answer to making a career in tourism and hospitality more attractive. Business owners and the visitor market must be able to sustain any wage increase, otherwise the result will be negative for all concerned.

4. **Make non-monetary incentives attractive.** These "perks" have always been a draw of working in the tourism and hospitality industry. Input from operators throughout the region has confirmed how important, as well as how varied they can be. Recognizing this reality and expanding the benefits offered to match the unique needs of different workers creates a positive working environment for everyone.

5. **There must be industry coordination with educational institutions at all levels.** Educators and students must be realistic to the needs of businesses, who seek graduates with hands-on experience and a willingness to learn on the job as well.

6. **Retaining workers is a key human resource strategy.** This is true not just in tourism but throughout the economy. Tourism and hospitality businesses are particularly challenged by this due to the seasonality factor but must continue to face the issue in creative ways.

7. **Make ongoing improvements to staff efficiency and productivity.** This can be achieved through training programs as well as by multi-tasking and implementing cross-training initiatives. This will lead to greater cost effectiveness and staff efficiency, as well as provide a stepping stone to career experience and development, again a benefit to both employers and employees.

8. **Ensure the continuation of foreign worker programs.** Temporary foreign workers and working holiday visa are programs that have proved to be well-suited to filling the gaps in tourism and hospitality labour needs. This door to labour must remain open, even during recessionary times.

The Vancouver Island tourism industry will move forward in the direction of positive growth only if sufficient labour is available to staff the tourism product and experiences being developed and promoted. All levels of the industry must come together to ensure its success, i.e. employees, employers, government and its agencies. The coordinated development of a Vancouver Island Tourism and Hospitality Human Resources Strategy is the next step in that process.

9. Conclusions

In this report, we examined available information regarding overall employment level and human resource requirement for the tourism industry as a whole in the Vancouver Island/Coast region. We also examined statistical data sources and survey reports, etc. to gain background information to the tourism industry in the province and on Vancouver Island specifically.

We then provide estimates of employment in core tourism related occupations in the region in year 2007 and 2008, and provide projections of the same in the period from 2009 to 2015. We have also presented statistical data available concerning different sources of labour that provides for the workforce in the tourism and hospitality industry in the region. We then presented our estimated and projected labour force growth based on population growth and labour force participation patterns.

In general, we have found that for the whole group of core tourism occupations under analysis, labour force growth should meet the needs of labour demand until 2013. After that, an ageing population and its resulting effect of limited labour force growth will mean that even if the industry hires every single individual available to work in that occupation, there will be a labour shortage.

For individual occupations within the group, the supply shortages for some appear much earlier than 2014. These include Chefs and Cooks, Food Services Occupations, including Food and Beverage Services, Bartenders, Food Counter Attendants, and Kitchen Helpers. To a less extent, Front Desk Clerks and Conference and Event Planners also show shortfall starting in 2010.

This report also presents the results of an online survey we conducted as well as interviews with industry stakeholders on current labour market conditions, demographic profiles, projected future labour requirement, and challenges faced by employers in recruitment and retention issues.

In general, the industry has been able to find enough people to fill in most positions throughout the year, even during summer months. However, in many cases employers do report having to take a long time to fill in the positions, and some may have to take less experienced or qualified workers to fill vacancies. The positions that industry stakeholder agreed as facing the most challenges include:

- Housekeeping - first and foremost;

- Culinary staff, specifically cooks (front-line/first), sous chefs and chefs, and

- Entry level restaurant (i.e. bus people) and kitchen (i.e. dishwashers)

Other occupations frequently mentioned as being difficult to fill and/or hold onto good, qualified staff include:

- Food servers

- Front-line staff (including front desk)

- Guides (including boat tour guides)

Other positions that industry stakeholders cited as potentially facing labour shortages include trades positions in maintenance, security, custodial/janitorial, and massage therapists working in spas.

Many areas of the industry face a challenge in recruiting young people into the sector as well as maintaining a level of apprenticeship enrolment that is sustainable to the industry. It is important to communicate to young people the kinds of jobs available in the industry, including career and managerial positions that are in need of young recruits. High school career counsellors and parents also need to be involved to encourage more young people to enter these seemingly unskilled jobs but with potential career opportunities. Certain factors impacting apprenticeship training completions have been identified.

We have also examined other issues related to recruitment and retention of skilled workers for the industry. Utilization of non-traditional types of labour supply, temporary use of foreign workers, seasonal nature of the work, inconsistency of the availability of work, multi-tasking, wages and compensation, and other factors have been thoroughly explored and discussed throughout the report. We have also presented recommendations from industry stakeholders on potential ways to better utilize existing sources of labour, and to develop additional sources of labour supply to meet the industry's needs.

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Appendix I Vancouver Island Tourism Human Resources Steering Committee

Committee Chair:

Mr. Kerry Jothen
Human Capital Strategies

Committee Members:

Patrick Chenier,
General Manager
Aboriginal Sports and Recreation Association of BC

Lorrie Dyer
Vice President
Unite Here

Owen Embree
Human Resources and Safety Coordinator
Mount Washington Alpine Resort

Mandy Farmer
President and CEO
Accent Inns

Bobbi-Jean Goldie
Business Development Manager
Tourism Association of Vancouver Island

Barry Laddell
Owner/Operator
Longwood Brew Pub

Michele Lanouette
Partnership Development Consultant
Employment and Labour Market Services Division
British Columbia Ministry of Housing and Social Development

John Leschyson
Director, Industry Human Resource Development
go2

Melody McLorie
Human Resources Manager
Wickaninnish Inn

Laurie Sagle
Director of Human Resources
Tigh-Na-Mara Seaside Spa Resort and Conference Centre

Appendix II List of Focus Group Participants

Courtenay Focus Group
Monday February 9, 2009

Participants:

Name	Organization
Brad Bradbury	RiverCorp
Richard Varela	Horne Lake Caves
Randy Rai	Crown Isle
Mike O'Hara (GM)	Kingfisher
Monica Best	Salmon Point Resort
Ian Heselgireve	Comox Airport
Michael O'Hara	April Point Resort
Christine Fleming	Painters Lodge
Owen Embree	Mount Washington Alpine Resort
Larry Seburn	Old House Village

Nanaimo Focus Group
Tuesday February 17, 2009

Participants:

Name	Organization
Barry Laddell	Longwood Brew Pub
Michael Anderson	Sunrise Ridge Resort
Deborah Grant	Best Western Mayfair Hotels
David Mailloux	Nanaimo Port Authority
Laurel Sliskovic	Living Forest Oceanside Campground
Debbie Trueman	Nanaimo Museum
Ron Whippen	AC Taxi
Martin Smith	AC Taxi
Amanda Evoy	Tourism Nanaimo

Victoria Focus Group
Wednesday February 18, 2009

Participants:

Name	**Organization**
Alison Peever	Chemistry Consulting
Michelle LeSage	Chateau Victoria
David Roberts	Prince of Wales
David Rooper	Silver Birch Hotels
Ian Powell	Inn at Laurel Pt
Jeannie Christison	Butchard Gardens
John Clisby	Best Western
Julie Wright	Inn at Laurel Pt
Peter Dutton	Royal Scott Hotels
Suzanne Gattrell	Oswego Hotel

Appendix III Preliminary Employment Projections for Validation in Focus Group Sessions

For VI, two scenarios of the future labour demand by selected occupation were presented at each of the three focus group sessions for discussion.

Vancouver Island/Coast

Employment of Core Tourism Related Occupations

	Scenario 1 - Positive Growth to 2015				Scenario 2 - Negative Growth to 2015			
	Annual Growth 2001 to 2006	Employed 2006	Proj Emp 2011	Proj Emp 2015	Annual Growth 2001 to 2006	Employed 2006	Proj Emp 2011	Proj Emp 2015
A211.0621 Retail Trade Managers	0%	10,660	11,190	11,644	0%	10,660	10,469	10,319
A221.0631 Restaurant and Food Service Managers	0%	3,220	3,470	3,697	0%	3,220	3,179	3,147
A222.0632 Accommodation Service Managers	0%	1,740	1,870	1,985	0%	1,740	1,702	1,673
B316.1226 Conference and Event Planners	4%	270	290	302	4%	270	269	268
F154.5254 Program Leaders and Instructors in Recreation and Sport	8%	1,530	1,620	1,692	8%	1,530	1,522	1,516
G011.6211 Retail Trade Supervisors	9%	1,470	1,540	1,603	9%	1,470	1,463	1,457
G012.6212 Food Service Supervisors	6%	800	870	923	6%	800	796	793
G013.6213 Executive Housekeepers	18%	90	100	106	18%	90	90	89
G211.6421 Retail Salespersons and Sales Clerks	6%	15,840	16,640	17,316	6%	15,840	15,761	15,698
G311.6611 Cashiers	3%	7,040	7,400	7,700	3%	7,040	7,005	6,977
G411.6241 Chefs	11%	1,040	1,120	1,184	11%	1,040	1,035	1,031
G412.6242 Cooks	2%	5,370	5,770	6,124	2%	5,370	5,317	5,274
G511.6451 Maîtres d'hôtel and Hosts/Hostesses	-2%	700	750	796	-2%	700	619	562
G512.6452 Bartenders	-2%	1,230	1,320	1,401	-2%	1,230	1,097	1,001
G513.6453 Food and Beverage Servers	-2%	6,370	6,850	7,270	-2%	6,370	5,898	5,546
G715.6435 Hotel Front Desk Clerks	5%	870	940	998	5%	870	866	862
G721.6441 Tour and Travel Guides	1%	370	390	409	1%	370	366	363
G722.6442 Outdoor Sport and Recreational Guides	-4%	280	300	313	-4%	280	231	199
G723.6443 Casino Occupations	3%	210	220	230	3%	210	209	208
G731.6671 Operators and Attendants in Amusement, Recreation and Sport	12%	330	350	366	12%	330	328	327
G732.6672 Other Attendants in Accommodation and Travel	2%	200	210	223	2%	200	198	196
G93.666 Cleaners	2%	11,640	12,240	12,737	2%	11,640	11,524	11,432
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	5%	7,920	8,530	9,053	5%	7,920	7,880	7,849
Total of Selected Occupations	3%	79,190	83,980	88,020	3%	79,190	77,825	76,786

Source: 2001 and 2006 Census; REPM; RKA

Appendix IV Geographic Boundaries of Tourism Regions and Development Regions

Appendix V Frequency Report of On-line Survey

Vancouver Island Tourism and Hospitality Labour Survey
Frequency of All Responses
Results to March 25, 2009

Q1. Which one of the following tourism sectors best describes your operation?

	Response Percent	Response Count
Accommodation	53.0%	62
Food and Beverage	5.1%	6
Recreation and Entertainment	19.7%	23
Transportation	6.0%	7
Travel Services	1.7%	2
Retail Trade	2.6%	3
Supplier to Tourism and Hospitality industry	0.0%	0
Other	12.0%	14
	answered question	117
	skipped question	6

Q2. In which of the following Vancouver Island regions is your operation (you may select more than one):

	Response Percent	Response Count
North Island	21.1%	24
North Central	16.7%	19
Pacific Rim	12.3%	14
Central Island	31.6%	36
Cowichan	7.9%	9
Gulf Islands	3.5%	4
South Island	25.4%	29
	answered question	114
	skipped question	9

Q4. 3. Looking at the total number of people your organization employs, would you say the number of employees increased, stayed the same or decreased since 2007?

	Response Percent	Response Count
Increased	31.0%	39
Stayed the Same	53.2%	67
Decreased	15.9%	20
	answered question	114
	skipped question	9

Q4. What, if any, changes do you predict for 2009 employment levels over 2008?

	Response Percent	Response Count
Increase	19.3%	23
Stay the Same	60.5%	72
Decrease	20.2%	24
	answered question	108
	skipped question	15

Q5. This study looks at tourism labour market trends and issues to the year 2015. What overall direction do you foresee for your organization's employment levels over the next five to six years?

	Response Percent	Response Count
Increase	57.8%	67
Stay the Same	36.2%	42
Decrease	6.0%	7
	answered question	108
	skipped question	15

Q6. Have your long-term hiring plans changed in any way as a result of the recent economic downturn?

	Response Percent	Response Count
Yes	41.5%	44
No	58.5%	62
Comments		60
	answered question	106
	skipped question	17

Q7. Do you have any long term concerns (up to the Year 2015) regarding the availability of labour to fill any specific tourism and/or hospitality jobs?

	Response Percent	Response Count
Yes	53.3%	56
No	46.7%	49
	answered question	105
	skipped question	18

Q8a. Approximately what percentage of your employees do you recruit from each of the following geographic areas?

Your estimates should total 100%."

	ResponseAverage	Response Count
% Local/regional community	81.91	97
% Other parts of Vancouver Island	9.11	51
% Other parts of British Columbia	4.42	41
% Other parts of Canada	2.64	31
% Internationally	1.92	27
	100.0	
	answered question	97
	skipped question	26

Q8b. What percentage of your employees hired over the last year came from each of the following:
Your estimates should total 100%."

	Response Average	Response Count
% Student still studying	28.82	72
% Graduate of a tourism/hospitality training program	6.84	45
% Employed at another tourism organization	23.04	51
% Employed in another industry	19.66	55
% Previously unemployed	11.88	42
% Other	9.77	33
	100.0	
	answered question	85
	skipped question	38

Q9a. Which of the following do you feel are the (three) most effective ways to recruit qualified employees to your organization?
Please select THREE only.

	Response Percent	Response Count
Word-of-Mouth	67.0%	67
Online websites	55.0%	55
Newspaper advertising	43.0%	43
Your corporate website	33.0%	33
Employment agency	20.0%	20
Career Fairs	14.0%	14
Other	11.0%	11
Not hiring at this time	10.0%	10
Temporary Foreign Work permit	5.0%	5
Trade publications	5.0%	5
Working Holiday Program Work Permit	4.0%	4
No strategy	2.0%	2
Provincial Nominee Program	1.0%	1
	answered question	100
	skipped question	23

Q10a. Which of the following financial recruitment and retention incentives does your company provide?

	Response Percent	Response Count
Staff discounts	65.9%	60
Extended health or dental plans	61.5%	56
Parking	48.4%	44
Use of facilities (pool, gym, tennis, restaurants, etc.)	37.4%	34
Vacation accruals	36.3%	33
Staff meals	34.1%	31
MSP	33.0%	30
Paid bereavement	26.4%	24
Stay bonuses	24.2%	22
Other	22.0%	20
Extra vacation time	15.4%	14
Signing bonuses	3.3%	3
	answered question	91
	skipped question	32

Q10b. Which of the following NON-financial recruitment and retention incentives does your company provide?

	Response Percent	Response Count
Training	79.8%	75
Staff social events and/or activities	77.7%	73
Flexible work schedule	74.5%	70
Birthday recognition	54.3%	51

Mentoring	45.7%	43
Long service awards	39.4%	37
Employment anniversary recognition	30.9%	29
Other	12.8%	12
	answered question	94
	skipped question	29

Q11. Does your organization currently, or did your organization in the past year, actively recruit from Aboriginal groups?

	Response Percent	Response Count
Yes	16.8%	16
No	83.2%	79
	answered question	95
	skipped question	28

Q12. Does your organization currently, or did your organization in the past year, actively recruit from individuals with disabilities?

	Response Percent	Response Count
Yes	8.5%	8
No	91.5%	86
	answered question	94
	skipped question	29

Q13. Which, if any, of the following types of regular or ongoing training does your organization offer to employees?

	Response Percent	Response Count
General orientation	89.6%	86
Customer service and relations	83.3%	80
Safety	81.3%	78
Courses, workshops outside the organization	57.3%	55
Other	15.6%	15
No training is provided	3.1%	3
	answered question	96
	skipped question	27

Q14. Which, if any, of the following are of concern when planning training programs for your employees

	Response Percent	Response Count
Cost of training	68.2%	58

Time taken away from other work	45.9%	39
Training often does not help with retention	28.2%	24
Limited training opportunities in local area	38.8%	33
Other	7.1%	6
	answered question	85
	skipped question	38

Q15. Does your organization currently hire any tourism related apprentices?

	Response Percent	Response Count
Yes	31.3%	30
No	68.8%	66
	answered question	96
	skipped question	27

Q16. Does your organization currently provide internships for students undergoing tourism related post-secondary training programs?

	Response Percent	Response Count
Yes	28.6%	28
No	71.4%	70
	answered question	98
	skipped question	25

Q18. What are the main causes of turnover for staff in your organization?

	Response Percent	Response Count
Working for another company in another industry	34.5%	29
Working for another company in the tourism industry	32.1%	27
Obtaining additional education/training outside the organization	27.4%	23
Retirement	10.7%	9
Collecting Employment Insurance	4.8%	4
Illness/injury	3.6%	3
Other	44.0%	37
	answered question	84
	skipped question	39

Q19. What, if any, types of actions has your organization taken over the past year to address or ease some of the difficulties associated with attracting and retaining qualified candidates?

	Response Percent	Response Count
Increased pay levels, wages and/or overtime	57.8%	52
Hired candidates that do not fully meet qualifications	45.6%	41
Increased recruiting efforts locally	42.2%	38
Increased training opportunities	35.6%	32
Increased benefits	32.2%	29
Improved working conditions and flexibility	31.1%	28
Increased recruiting outside the region	23.3%	21
Coordinate with other employers to refer/provide employees when operating seasons are complementary	21.1%	19
Looked for employees overseas	15.6%	14
Jobs have remained VACANT	15.6%	14
Sent work to outside contractors	13.3%	12
Provided recruitment and/or retention bonuses	6.7%	6
Other	11.1%	10
	answered question	90
	skipped question	33

Appendix VI Techniques Applied to Derive Employment Estimates and Projections by Occupation

In Section 4 we estimated annual employment level in 2007 and 2008 for the core tourism occupations. We also provided projections for employment in these occupations from 2009 through 2015. Here is a description of the techniques applied to generate these estimates.

As year over year occupational data at a four-digit National Occupation Classification (NOC) level is not available, we have to rely on employment growth by industry in the region concerned to estimate employment growth with those occupations under analysis. We start from the notion that the most detailed occupational data by industry is available from the Census.

At the Development Region level, employment data available includes the following industry sub-sectors as defined by the North American Industry Classification System (NAICS):

- 111-112 Agriculture
- 113-115, 21 Forestry, fishing, mining, oil and gas
- 22 Utilities
- 23 Construction
- 31-33 Manufacturing
- 41, 44-45 Trade
- 48-49 Transportation and warehousing
- 52-53 Finance, insurance, real estate and leasing
- 54 Professional, scientific and technical services
- 55-56 Business, building and other support services
- 61 Educational services
- 62 Health care and social assistance
- 51, 71 Information, culture and recreation
- 72 Accommodation and food services
- 81 Other services
- 91 Public administration

The first step in estimating employment growth in core tourism occupations is to calculate each occupation's distribution by industry using 2006 Census data, based upon industry aggregation as shown in the list above. Then, based upon employment growth in these industries in the Vancouver Island/Coast Development Region from 2006 to 2007 and from 2007 to 2008, we have been able to derive employment growth for each of the core tourism occupations.

It should be noted that employment level in 2006 for each of the occupations has been obtained from BC Stat's Regional Employment Projections Model (REMP).

For employment projections in 2009 through 2013, we have relied upon economy wide GDP and employment growth projections put forward by the Ministry of Finance in the provincial budget released on February 17, 2009:

Table 3.7 Ministry of Finance Economic Forecast: Key Economic Indicators

		Forecast				
	2008	2009	2010	2011	2012	2013
British Columbia Economic Indicators		Per cent change unless otherwise noted				
Real GDP	1.0 [e]	-0.9	2.4	2.6	2.6	2.6
Nominal GDP	3.9 [e]	-0.9	4.2	4.6	4.8	4.8
Employment	2.1	-0.5	1.3	1.5	1.6	1.6
Unemployment rate (per cent)	4.6	6.2	6.0	5.7	5.5	5.5
Total net in-migration (thousands of persons)	56.1 [1]	47.8	48.7	49.8	49.6	51.5
Personal income	5.1 [e]	1.7	3.5	4.3	4.5	4.5
Corporate pre-tax profits	-4.0 [e]	-24.7	1.5	3.2	4.4	4.4
Housing starts (thousands of units)	34.3	25.5	26.8	27.8	28.4	29.2
Retail sales	1.5 [e]	1.3	4.4	4.4	4.4	4.4

[e] Ministry of Finance estimate. [1] BC Stats estimate.

We have further extended potential growth projections for the year 2014 and 2015 by way of moving averages.

From these fundamental employment growth projections, we are able to derive potential employment growth in industries in the Vancouver Island/Coast region from 2009 to 2013 by comparing past employment growth patterns in industries in that region with provincial overall employment growth pattern in the same period (2000 to 2008). This way, we ensure that industry specific growth rates conform to overall employment growth in the region in a given year.

Therefore we have been able to calculate occupational growth rates in each year based on occupation distribution by industry and industry specific growth rates in a given year.

We have further adjusted specific occupational employment growth based upon information we have collected through primary research.