



Executive Summary

In 2016 the tourism sector accounted for 2.05% of Canada's gross domestic product (GDP)¹ (\$38.7 million), and generated \$25.5 billion in government revenue.² Tourism activities drive key service industries, including accommodations, food and beverage, passenger transportation, recreation, entertainment, and travel services. Located in urban, rural and remote locations, tourism generated 721,600 jobs across Canada in 2016.¹ In 2016, the country experienced its second highest number of total arrivals (20 million)³.

On a provincial scale, tourism is one of BC's largest employers. BC outperforms all other provinces and territories when considering overnight visitors, which reached 5.5 million in 2016, up 12.3% from 2015.⁴ In 2015, tourism GDP in British Columbia contributed \$7.4 billion to the provincial economy, \$15.7 billion in revenues, and employed 127,700 people in 19,000 businesses.⁴

While 5.5 million international visitors explored BC in 2016, on a national level statistics show that in 2015 76.6% of tourists in British Columbia were domestic (originating in BC), 16% were from Alberta, 4.3% from Ontario, 2.1% from the prairie provinces and 0.5% originated from Quebec and the Atlantic provinces respectively.⁵

At the Columbia Basin-Boundary regional level determining the impact of the tourism sector is difficult due to the number of ways people can travel to and from the region, the wide variety of activities that tourists can participate in, and the formal and informal accommodations. However we know that in 2014, the tourism sector in the Kootenay Rockies regionⁱ employed 4,500 people

ⁱThe Kootenay Rockies region is an area defined by Destination BC and BC Stats and overlaps with much of the Columbia Basin-Boundary, except for the exclusion of Christina Lake to Big White and Valemount.

(4% of provincial total) and was home to 820 of the tourism related establishments (4% of the provincial total).⁶

This report examines the tourism sector in BC, and explores its contributions to the Columbia Basin-Boundary region.

Introduction

This report is part of a Social Sciences and Humanities Research Council of Canada (SSHRC) funded project entitled, *Regional Workforce Development in Rural BC*. The purpose of this report is to identify current tourism sector market trends and issues, including current and projected labour market needs to help workforce development partners within the Columbia Basin-Boundary region understand and respond to changing labour market demands. This tourism sector labour market profile identifies characteristics that comprise the BC tourism sector, including performance in terms of production, and contribution to the regional economy.

The guiding research questions include:

1. What is known about the tourism sector within the Columbia Basin-Boundary region and how does the region compare provincially and nationally?
2. What are the current and projected labour market needs for the Columbia Basin-Boundary region?

Methodology

This Tourism Labour Market Profile was prepared by reviewing the following sources (see **Appendix A: References and Resources**):

- Industry research of publically available studies and reports;
- Industry data and statistics collected from publically available sources such as Statistics Canada, BC Stats, Destination Canada, Destination BC, as well as other industry associations;
- Secondary research documents; and
- Labour Force Survey data purchased through Statistics Canada.

Data related specifically to the labour market for the tourism industry was selected, as well as economic data that illustrates the status of the labour market. Additional information on a sector in the Columbia-Basin Boundary region may be available as part of the [State of the Basin](#) report prepared by the Columbia Basin Rural Development Institute.

In general, statistics are not frequently reported for the Columbia Basin-Boundary region making it challenging in some instances to report on statistics for the Columbia Basin-Boundary in its entirety. For instance, some data is collected at a Development Region level and the Columbia Basin-Boundary covers three Development Regions: Revelstoke and Golden in the Thompson-Okanagan region, Valemount in the Cariboo region, and the entirety of the Kootenay Development Region (see **Figure 1**). In other instances, data is reported for the South East region, which includes both the Thompson-Okanagan and Kootenay census economic regions, but excludes Valemount.

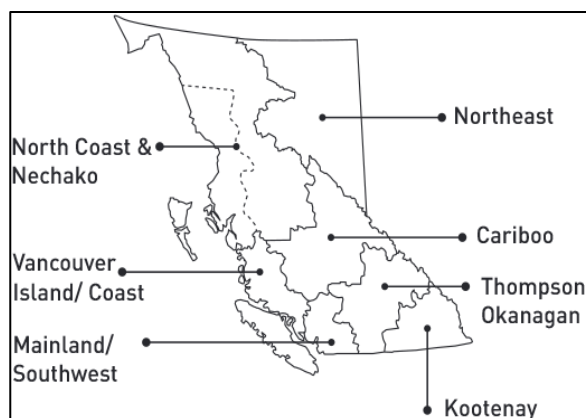


Figure 1: BC development regions as defined by Work BC.⁷

This report was researched and prepared between January 2, 2017 — July 30, 2017.

The Columbia Basin-Boundary

Located in the southeast corner of British Columbia, the Columbia Basin-Boundary region (see **Figure 2**) includes the Regional Districts of East Kootenay, Central Kootenay, Kootenay Boundary, in addition to Revelstoke, Golden, Valemount, and Columbia Shuswap Regional District Areas A and B. With an approximate land area of 83,171 square kilometres, the region accounts for 9% of the size of British Columbia, and is abundant with valleys and mountain ranges including the Purcells, Selkirks and Monashees.

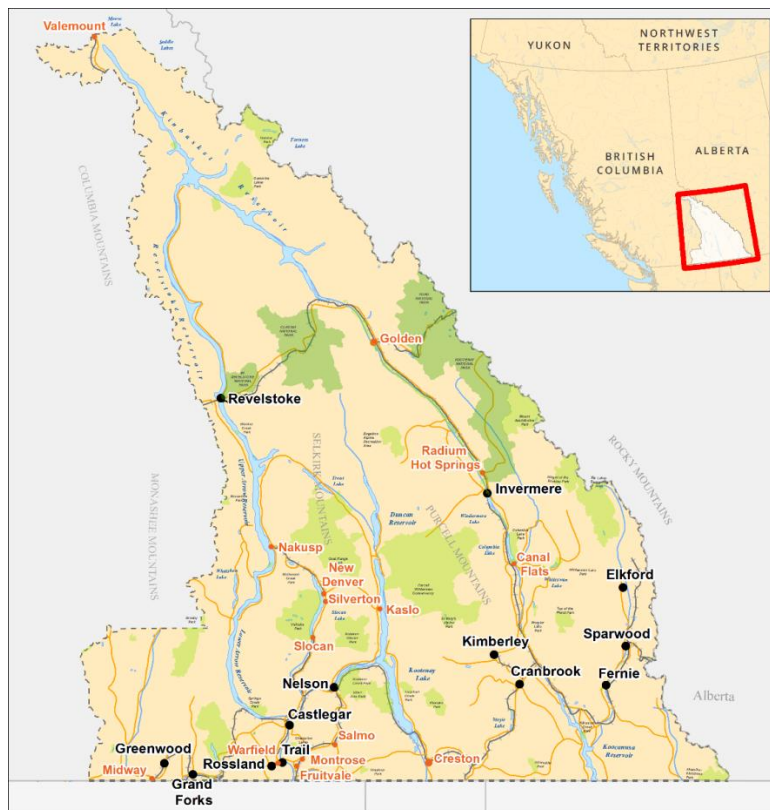


Figure 2: The Columbia Basin-Boundary region.

With a regional population of 162,900, the Columbia Basin-Boundary accounts for 3.5% of the provincial population.⁸ In terms of demographic trends, the overall population is aging and while different communities have different population projections the overall regional population projection is steady, with no large gains or losses.⁸

The regional economy is primarily resource-based, with the forestry and mining sectors acting as two key economic drivers. The region's hydro-electric power generation accounts for approximately 44% of electricity generated in the province and the region is home to British Columbia's largest coal fields. The Columbia Basin-Boundary region is also amenity-rich, supporting a vibrant tourism industry and includes 12 mountain resorts and ski hills within its boundaries.

The labour market in the Kootenay Development Region is currently strong, with the second highest job growth of the seven Development Regions reported between 2010 and 2015 (3.5%).⁹ While 54.2% of residents have some post-secondary education, only 5.1% have a university certificate, diploma, or degree above a bachelor's degree, and 9.9% have a university bachelor's

degree.¹⁰ These educational attainments are lower than both BC and Canada, where in BC 8.1% have a university certificate, diploma, or degree above a bachelor's degree, and 14.0% have a university bachelor's degree.¹⁰ For Canada, it is 7.5% and 13.3% respectively.¹¹ It is important to note that provincially more than 78% of all future job openings will require post-secondary education, including 36% that will require a bachelor's, graduate or first professional degree and/or significant work experience.¹² The unemployment rate in the Kootenay development region in March of 2017 is 6.4%.¹³

Characteristics of the Tourism Sector

The tourism sector includes those industries that provide a service used by tourists. The core industries of tourism include accommodation services, food and beverage services and arts and recreation services; however, also includes aspects of retail, transportation, information and cultural industries, public administration among other services. However, while BC Stats recognizes BC's economy includes both goods-producing and service-producing industries, it assumes that goods-producing industries do not deal directly with tourists.

Tourism activities include the activities of visitors who are temporarily away from their permanent residence for a number of different reasons, such as:

- Travelling for leisure
- Visiting family and friends
- Visiting a vacation home
- Travelling to obtain health care
- Travelling on business
- Temporarily away from home for other reasons

The BC tourism sector includes a group of industries that have similar characteristics and is defined "to include all industries that provide a service directly to tourists."¹⁴

Tourism in Canada

In 2016, tourism's share of the national gross domestic product (GDP) was 2.05%.¹ Total spending from domestic and international visitors reached \$91.6 billion in 2016. In terms of employment, 721,600 jobs were required in the country in 2016 to meet the demand for service delivery. The largest sources of service demand were in the food and beverage industry (228,100 jobs), accommodation (143,900 jobs), recreation and entertainment (67,700 jobs), air transportation (52,800 jobs), and travel services (44,900).¹

Nationally, projections for Canada's tourism sector indicate that by 2030 the demand for labour will be over 2.1 million full-year jobs, while the supply of labour is expected to reach 1.9 million in 2030 – leaving a shortfall of approximately 200,000 jobs.¹⁵ Labour shortages are anticipated in almost all tourism related industries, with the greatest projected gap between labour supply and demand anticipated for the recreation and entertainment sector (13.3%), and food and beverage services sector (11.8%).¹⁵ The accommodation (8.3%) and transportation sectors (9.5%) will both see gaps, while travel services is expected to see a surplus in labour (-12.0%).¹⁵ Overall labour shortage is expected to be 10.7% across the country, with BC's projected labour shortage to be 9.6%.

Tourism in BC

In 2015, the tourism industry generated \$15.7 billion in revenue, up 5.3% from 2014.¹⁶ Revenue in 2015 was highest for accommodation and food services (35.5% or \$5,564 million), followed by transportation (32% or \$5,012 million), retail services (26.3% or \$4,117 million), and other services (6.2% or \$970 million).¹⁶ Tourism accounts for 13.2% of BC's total export revenue from BC's primary resource commodities for 2015.¹⁶

As shown in **Figure 3**, BC Stats shows that the tourism sector contributed \$7.1 million in 2014 to the provincial GDP. Another source, Destination BC, shows that tourism contributed more to the GDP in 2015 than any other primary resource industry (i.e. oil and gas, mining, forestry and logging, and agriculture).¹⁶



Figure 3: BC tourism GDP, 2007 - 2014¹⁷

As shown in **Figure 4**, Destination BC reports that Accommodation & Food Services generated just over one-third (35.5%) of total tourism revenues in 2015. Transportation accounted for nearly a third (32%) and retail services accounted for more than a quarter (26.3%) of total tourism revenues. Other tourism-related services (e.g. vehicle rentals, tourism-related recreation, entertainment, and vacation homes) accounted for 6.2% of total revenues.

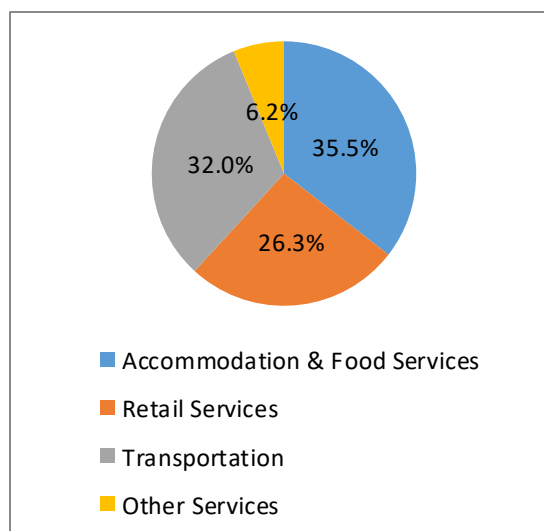


Figure 4: Share of BC tourism revenue by sector, 2015⁵

Provincially, the tourism industry provides employment to 127,500 people in the province (see **Figure 5**). This is an increase of 2% from 2013, and an overall increase of 8% since 2007.

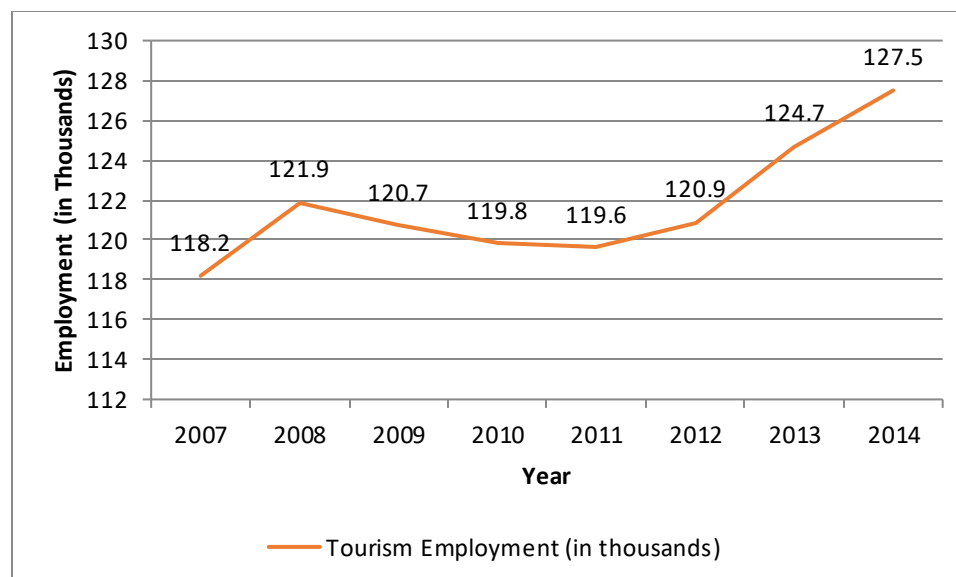


Figure 5: Tourism employment in thousands, BC, 2007 - 2014¹⁷

In BC, the average compensation paid for work in the tourism sector in 2015 was \$35,231.⁵ The transportation services sector had the highest average compensation at \$60,387, while the accommodation and food services sector had the lowest at \$26,268.⁵

Tourism Sector Classifications: North American Industry Classification System (NAICS)

The tourism sector is defined by the North American Industrial Classification System (NAICS)ⁱⁱ to include the sub-industries of:

- Accommodation services;
- Transportation (including air, rail and passenger transportation);
- Food services and drinking places;
- Amusement, gambling and recreation industries;
- Performing arts, spectator sports and related industries; and
- Heritage institutions.

See **Appendix B** for a detailed list of NAICS and National Occupational Classification (NOC) codes.

The accommodation services industry (NAICS 721) is primarily engaged in providing short-term lodging for travellers, vacationers and others. In addition to lodging, a range of other services may be provided. For example, many establishments have restaurants, while others have recreational facilities. Lodging establishments are classified in this subsector even if the provision of complementary services generates more revenues. Establishments that operate lodging facilities primarily designed to accommodate outdoor enthusiasts (i.e. camps, lodges, etc.), are also included in this subsector. These establishments are characterized by the type of accommodation and by the nature and the range of recreational facilities and activities provided to their clients.¹⁸

ⁱⁱ The North American Industry Classification System (NAICS) is an industry classification system composed of sectors (two-digit codes), subsectors (three-digit codes), industry groups (four-digit codes), industries (five-digit codes) and country specific industries (six-digit codes).

The transportation sector (NAICS 48-49) (as related to the tourism sector), comprises of establishments primarily engaged in transporting passengers and include aspects of the sub sectors of rail (NAICS 482), water (NAICS 483), and air transportation (NAICS 481).¹⁸

The food services and drinking places sector (NAICS 722) is comprised of establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises. This subsector does not include food service activities that occur within establishments such as hotels, civic and social associations, amusement and recreation parks, and theatres. However, leased food-service locations in facilities such as hotels, shopping malls, airports, and department stores are included. The industry groups within this subsector include drinking places (NAICS 7224) and full-service restaurants and limited-service eating places (NAICS 7225).¹⁸

The amusement, gambling, and recreation subsector (NAICS 713) is comprised of establishments primarily engaged in operating recreation, amusement, and gambling facilities and services. Examples of establishments in this subsector are golf courses, skiing facilities, marinas, recreational sports and fitness centres, bowling centres, amusement parks, amusement arcades and parlours, casinos, bingo halls, operators of video gaming terminals, and operators of lotteries.¹⁸

The performing arts, spectator sports and related industries (NAICS 711) subsector has a clear distinction between performing arts companies and performing artists (independents). Although not unique to arts and entertainment, freelancing is a particularly important phenomenon in this subsector; however, it is difficult to implement in the case of musical groups (companies) and artists, especially pop groups. These establishments tend to be more loosely organized and it can be difficult to distinguish companies from freelancers. Therefore, this subsector includes one industry that covers both musical groups and musical artists.¹⁸

Heritage institutions subsector (NAICS 712) is comprised of establishments primarily engaged in preserving and exhibiting objects, sites and natural wonders of historical, cultural and educational value.¹⁸

Tourism Sector Trends & Outlook in the Columbia Basin-Boundary Region

In 2016, the Rural Development Institute published a [Trends Analysis for the Tourism Sector](#) in the Columbia Basin-Boundary Region. That report provides a detailed look at the following indicators:

- Provincial Resort Municipality Status;
- Annual Room Revenues Generated By the Hotel Room Tax;
- Number of Tourists That Visit Visitor Centres;
- Number of Passengers That Pass Through Local Airports;
- Number of Vehicles Travelling the Local Highways;
- Number of Tourism Related Businesses;
- Employment in the Tourism Sector; and
- The Activities and Alternative Accommodations That Exist.

This report will look at additional indicators that are related to the labour market sector specifically.

Tourism sector establishments

The Kootenay Rockiesⁱⁱⁱ is home to 4.3% of the tourism related businesses in the province.⁵ That number has stayed nearly the same between 2014 and 2015; there were 820 establishments in 2014 and 819 in 2015.⁵

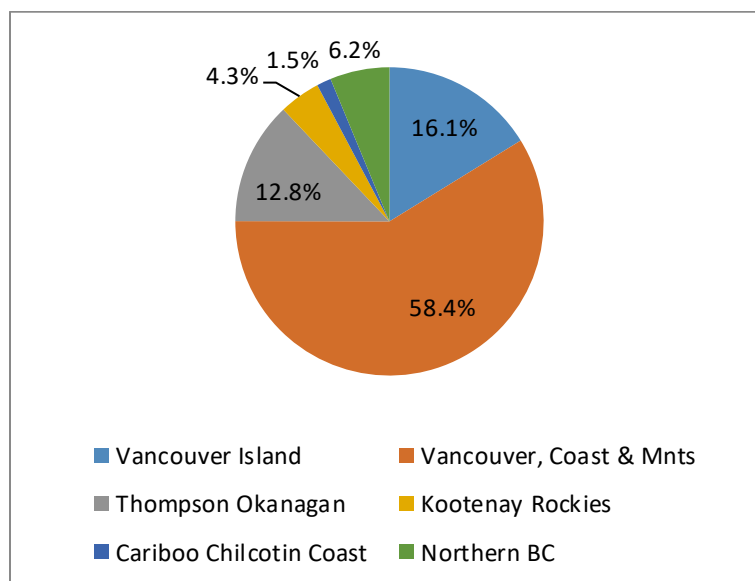


Figure 6: Percentage of tourism businesses by region, 2015⁵

Economic contribution

The number of tourism employees in the Kootenay Rockies has fluctuated over the years (see **Figure 7**). In 2015, there were 4,000 tourism employees in the region.

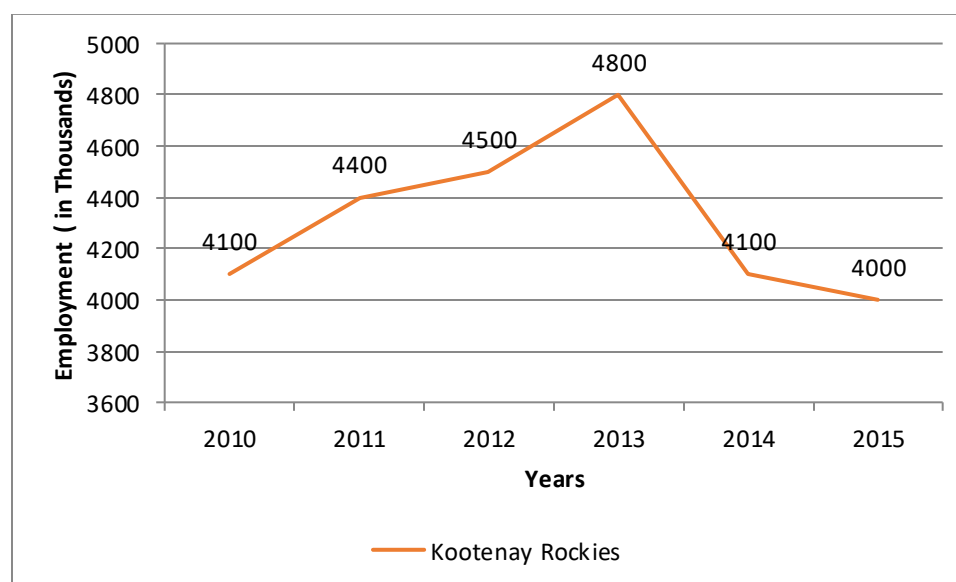


Figure 7: Tourism employment in the Kootenay Rockies, 2010 - 2015⁵

ⁱⁱⁱ The Kootenay Rockies region is an area defined by Destination BC and BC Stats and overlaps with much of the Columbia Basin-Boundary, except for the exclusion of Christina Lake to Big White and Valemount.

Figure 8 represents the projections for the overall labour force participation rates for the Kootenay Development Region. The Kootenay Development Region has a lower labour force participation than the provincial average due to the significantly older age profile within the region.¹⁹ The forecast for the region is for continued lower rates of labour force participation as compared to the province as a whole.¹⁹ Similar to the rest of the province, participation rates are projected to decline as the region's population ages.¹⁹

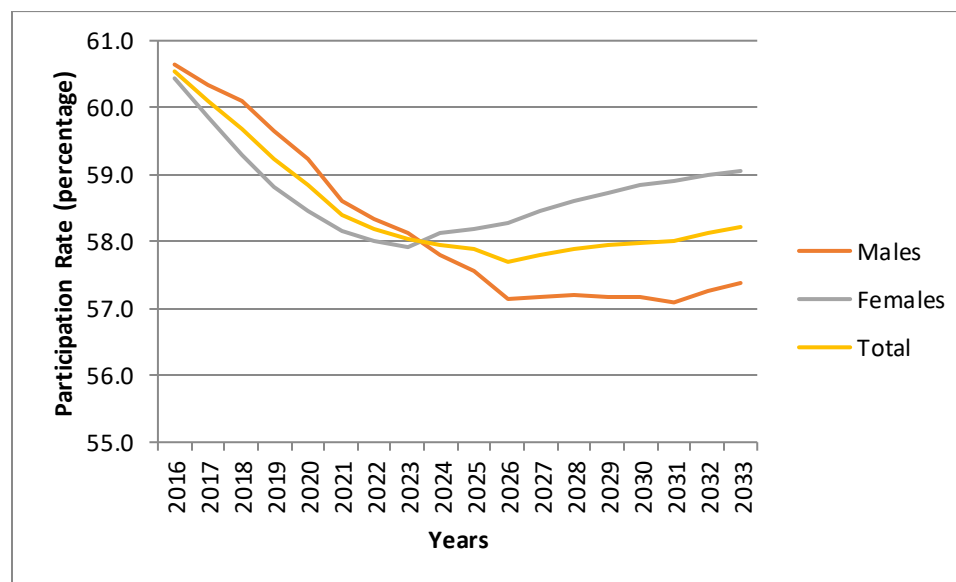


Figure 8: Actual and projected labour force participation rates in the Kootenay Development Region, 15 Years and Over, 2016 - 2033²⁰

Employment forecast^{iv}

A total of 134,700 job openings are expected in the South East region by 2025 across all industries.^{v,12} Three in ten openings are due to economic growth and the rest are to replace retired workers. Employment demand in the region is forecast to increase each year by 1.1 % on average, the same rate as the provincial average.¹²

As shown in **Figure 9**, in BC and in the Kootenay Development Region, the accommodation services subsector will see the highest average annual growth rate of employment between 2016 and 2025, at a rate of 2.0% and 2.1% respectively. Provincially, the Tourism and Hospitality industry is benefiting from an increase in tourism activity and strong consumer spending.

The amusement, gambling, and recreation subsector will see the lowest growth provincially 1.0%, and the air transportation subsector will see the lowest growth in the Tourism and Hospitality subsector in the Kootenay development region at just 0.1%.

^{iv} Data for industry subsectors is available from WorkBC. Only those subsectors with an Industry Outlook Profile were included. Refer to: <https://www.workbc.ca/Labour-Market-Industry/Industry-Information/Industry-Outlooks/Tourism-and-Hospitality.aspx>

^v The South East region includes Thompson-Okanagan and Kootenay Census Economic Regions. Note that while this area does not match the Columbia Basin-Boundary region it covers the majority of region except for Valemount located in the Cariboo Census Economic Region.

Interestingly, when looking at the South East region, the ‘performing arts, spectator sports, and related industries’ is projected to be the fourth fastest expanding industries with an annual average employment growth of 2.8%.²¹

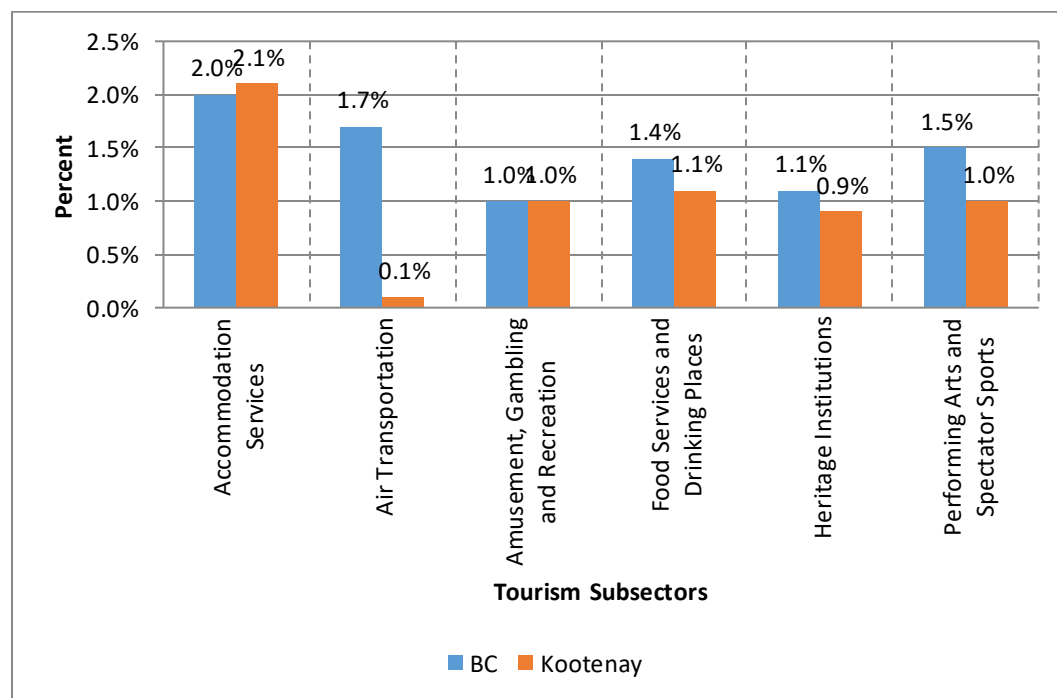


Figure 9: Average annual growth rate of employment, tourism subsectors, 2016 - 2025²²⁻²⁷

Within the Kootenay Development Region approximately 2,168 job openings are estimated by 2025 in the Tourism and Hospitality sector.²²⁻²⁷ As shown in **Figure 9**, the ‘Accommodation Services’ subsector will see the most number of job openings between 2015 and 2025, with 894 positions. This accounts for 5% of all jobs in the subsector in the province (16,846 provincially).

The food services and drinking places (635) and amusement, gambling, and recreation (412) are all subsectors which will see higher number of job openings in the region.

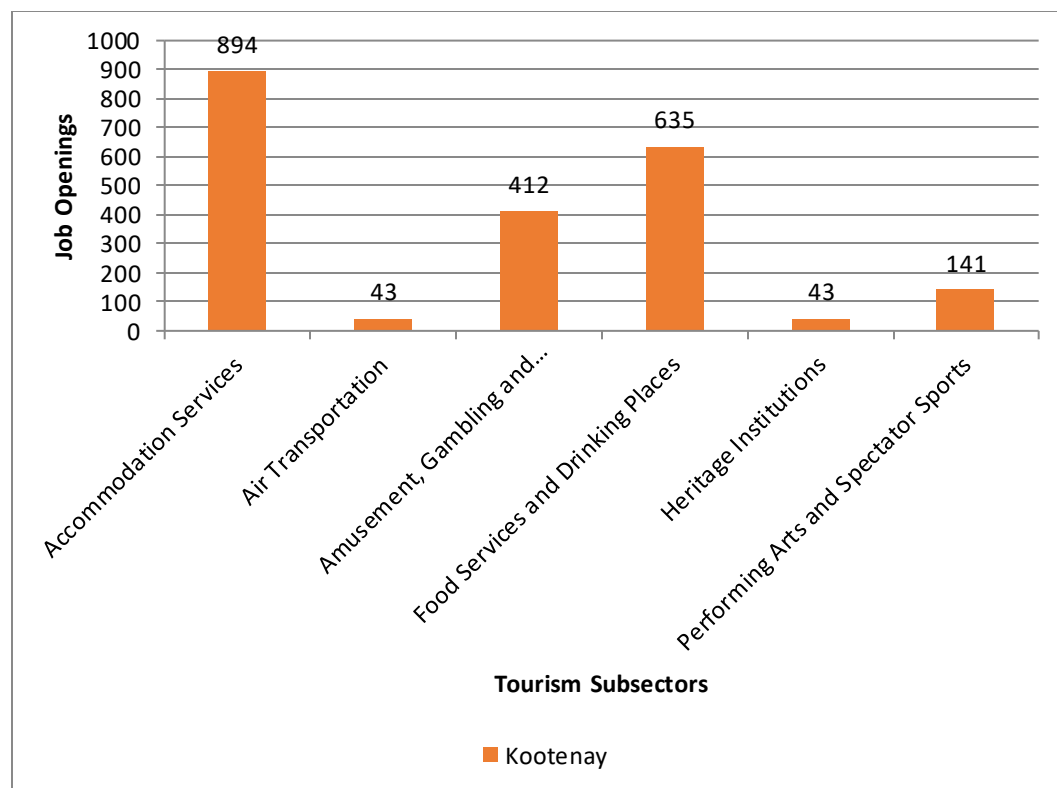


Figure 10: Industry job openings, Kootenay Development Region, 2015-2025²²⁻²⁷

Occupational forecast^{vi}

None of the Tourism related occupations are in the top 10 occupations forecast to expand the fastest in the South East region.²¹ However, the *British Columbia 2025 Labour Market Outlook* (2016) notes that sales and service occupations, particularly in retail trade, offer significant opportunities for people entering the labour force and half of total projected job openings are expected to occur in the retail trade, arts, recreation, and hospitality industries (in addition to health and social assistance and professional services).²¹

Labour demand-supply projection

The labour force supply less demand^{vii} (**Table 1**) looks at the occupations related to the tourism sector in the South East region and examines the supply of workers against the demand for workers. Labour force demand is an estimate of the number of workers needed (employment) as well as the number of workers that are normally unemployed (due to transitioning between jobs, responding to seasonal fluctuations, or lack of skills match). Labour force supply represents the possible labour force, including supply from new entrants and from migrants.

Occupations shown in **Table 1 and 2** are taken from the list of occupations compiled as part of the WorkBC Industry Outlook Profile for the sub-industries related to Tourism:

^{vii} Labour Force Supply Less Demand: The difference between the Labour Force Supply and Labour Force Demand. If this value is positive, then Labour Force Supply is greater than Labour Force Demand.

Accommodation Services (NAICS 721), Air Transportation (NAICS 481), Amusement, Gambling, and Recreation (NAICS 713), Food Services and Drinking Places (NAICS 722), Heritage Institutions (NAICS 712), and Performing Arts and Spectator Sports (NAICS 711).

As shown in **Table 1**, retail salespersons (-1225), retail and wholesale trade managers (-777), food counter attendants, and kitchen helpers and related support occupations (-666), are the top three occupations with the highest, sustained projected demand in the tourism sector until 2025 in the South East region.

Geographic Area - South East	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
0015 Senior managers - trade, broadcasting and other services, n.e.c.	2	-1	-4	-7	-7	-7	-7	-6	-4	-4	-4	-49
0016 Senior managers - construction, transportation, production and utilities	-5	0	-4	-8	-8	-11	-10	-8	-5	-5	-4	-68
0111 Financial managers	-2	1	-4	-7	-7	-8	-7	-6	-4	-4	-4	-52
0112 Human resources managers	-3	1	-1	-3	-4	-4	-4	-3	-2	-2	-2	-27
0124 Advertising, marketing and public relations managers	0	-1	-3	-5	-5	-6	-6	-5	-3	-3	-3	-40
0511 Library, archive, museum and art gallery managers	1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-9
0512 Managers - publishing, motion pictures, broadcasting and performing arts	0	0	-1	-2	-2	-2	-2	-2	-1	-1	-1	-14
0513 Recreation, sports and fitness program and service directors	-2	0	-2	-4	-4	-5	-5	-4	-3	-3	-3	-35
0601 Corporate sales managers	4	-3	-8	-12	-12	-13	-13	-10	-7	-7	-6	-87
0621 Retail and wholesale trade managers	13	15	-58	-109	-114	-124	-119	-93	-64	-62	-62	-777
0631 Restaurant and food service managers	30	3	-19	-35	-37	-40	-38	-30	-21	-20	-20	-227
0632 Accommodation service managers	20	-2	-9	-14	-14	-15	-14	-11	-8	-7	-7	-81
0714 Facility operation and maintenance managers	1	-2	-9	-14	-14	-15	-14	-11	-8	-7	-7	-100
0731 Managers in transportation	-7	-1	-3	-5	-5	-5	-5	-4	-3	-3	-3	-44

Geographic Area - South East	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
0821 Managers in agriculture	2	10	-16	-28	-30	-34	-32	-24	-16	-15	-15	-198
1111 Financial auditors and accountants	-38	10	-12	-27	-29	-32	-31	-25	-17	-16	-16	-233
1121 Human resources professionals	0	0	-2	-5	-5	-5	-5	-4	-3	-3	-3	-35
1122 Professional occupations in business management consulting	-5	2	-3	-5	-6	-6	-6	-5	-3	-3	-3	-43
1123 Professional occupations in advertising, marketing and public relations	-1	0	-3	-5	-5	-5	-5	-4	-3	-3	-3	-37
1221 Administrative officers	-27	5	-29	-55	-57	-66	-62	-50	-35	-33	-32	-441
1226 Conference and event planners	0	-1	-1	-2	-2	-2	-2	-2	-1	-1	-1	-15
1311 Accounting technicians and bookkeepers	-36	7	-27	-50	-53	-61	-57	-45	-31	-30	-29	-412
1411 General office support workers	10	1	-23	-41	-43	-50	-47	-38	-27	-26	-25	-309
1414 Receptionists	-34	-1	-21	-40	-43	-49	-48	-39	-29	-27	-27	-358
1431 Accounting and related clerks	-4	0	-11	-19	-19	-22	-21	-17	-11	-11	-11	-146
1522 Storekeepers and partspersons	8	-1	-9	-14	-14	-15	-14	-11	-8	-7	-7	-92
2133 Electrical and electronics engineers	0	0	-4	-5	-5	-6	-5	-4	-3	-3	-3	-38
2171 Information systems analysts and consultants	-4	2	-4	-9	-9	-10	-10	-8	-6	-5		-63
2225 Landscape and horticulture technicians and specialists	-5	1	-3	-6	-7	-8	-7	-6	-4	-4	-4	-53

Geographic Area - South East	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
2244 Aircraft instrument, electrical and avionics mechanics, technicians and inspectors	0	-2	-2	-2	-2	-2	-2	-2	-1	-1	-1	-17
2271 Air pilots, flight engineers and flying instructors	4	-3	-6	-7	-7	-7	-7	-5	-3	-3	-3	-47
4021 College and other vocational instructors	18	-2	-13	-23	-21	-23	-21	-17	-12	-12	-11	-137
4112 Lawyers and Quebec notaries	-8	2	-4	-8	-8	-9	-9	-7	-5	-5	-5	-66
4163 Business development officers and marketing researchers and consultants	-1	0	-2	-4	-4	-4	-4	-3	-2	-2	-2	-28
4167 Recreation, sports and fitness policy researchers, consultants and program officers	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-10
5112 Conservators and curators	0	0	0	0	0	0	0	0	0	0	0	0
5121 Authors and writers	2	-3	-4	-5	-5	-6	-5	-4	-3	-3	-3	-39
5133 Musicians and singers	8	-3	-5	-7	-7	-8	-7	-6	-4	-4	-4	-47
5135 Actors and comedians	0	0	0	0	0	0	0	0	0	0	0	0
5136 Painters, sculptors and other visual artists	4	-4	-5	-7	-7	-7	-7	-5	-4	-4	-3	-49
5212 Technical occupations related to museums and art galleries	1	-1	-1	-1	-1	-1	-1	-1	0	0	0	-6
5244 Artisans and craftspersons	1	-1	-3	-5	-5	-6	-5	-4	-3	-3	-3	-37
5252 Coaches	1	-1	-2	-3	-3	-3	-3	-2	-2	-2	-2	-22

Geographic Area - South East	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
5254 Program leaders and instructors in recreation, sport and fitness	-13	-1	-11	-22	-22	-26	-24	-19	-13	-13	-12	-176
6311 Food service supervisors	11	1	-6	-11	-12	-13	-12	-10	-7	-7	-7	-73
6312 Executive housekeepers	5	0	-2	-3	-3	-3	-3	-2	-1	-1	-1	-14
6313 Accommodation, travel, tourism and related services supervisors	-1	0	-1	-2	-2	-3	-3	-2	-1	-1	-1	-17
6316 Other services supervisors	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-9
6321 Chefs	8	0	-8	-14	-15	-16	-15	-12	-9	-8	-8	-97
6322 Cooks	46	6	-37	-66	-72	-77	-74	-58	-41	-39	-40	-452
6332 Bakers	-11	0	-7	-13	-14	-15	-15	-11	-8	-7	-7	-108
6411 Sales and account representatives - wholesale trade (non-technical)	3	-7	-17	-25	-25	-27	-27	-21	-14	-14	-13	-187
6421 Retail salespersons	18	26	-90	-170	-178	-196	-188	-148	-102	-99	-98	-1225
6511 Maîtres d'hôtel and hosts/hostesses	6	0	-3	-5	-5	-6	-6	-4	-3	-3	-3	-32
6512 Bartenders	10	0	-6	-10	-10	-11	-11	-8	-6	-6	-6	-64
6513 Food and beverage servers	43	5	-34	-61	-66	-70	-67	-53	-37	-35	-35	-410
6522 Purser and flight attendants	0	-2	-3	-3	-3	-3	-3	-2	-2	-2	-2	-25
6523 Airline ticket and service agents	1	-1	-2	-3	-3	-3	-2	-2	-1	-1	-1	-18
6525 Hotel front desk clerks	30	-3	-11	-16	-17	-17	-16	-13	-9	-8	-8	-88
6531 Tour and travel guides	-1	0	0	-1	-1	-1	-1	-1	0	0	0	-6
6533 Casino occupations	-8	0	-2	-4	-4	-5	-4	-4	-2	-2	-2	-37

Geographic Area - South East	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
6541 Security guards and related security service occupations	-19	4	-8	-16	-17	-19	-19	-15	-10	-10	-10	-139
6552 Other customer and information services representatives	-11	0	-12	-20	-21	-24	-24	-19	-13	-12	-12	-168
6611 Cashiers	17	11	-40	-76	-80	-87	-84	-65	-45	-44	-44	-537
6621 Service station attendants	-1	1	-3	-6	-6	-6	-6	-4	-3	-3	-3	-40
6711 Food counter attendants, kitchen helpers and related support occupations	67	7	-53	-96	-104	-113	-109	-86	-61	-59	-59	-666
6721 Support occupations in accommodation, travel and facilities set-up services	2	0	-1	-1	-1	-1	-1	-1	-1	0	0	-5
6722 Operators and attendants in amusement, recreation and sport	-14	0	-7	-13	-13	-15	-14	-11	-8	-8	-8	-111
6731 Light duty cleaners	35	3	-41	-70	-74	-81	-79	-62	-44	-42	-42	-497
6733 Janitors, caretakers and building superintendents	-1	5	-32	-57	-59	-65	-63	-50	-35	-34	-33	-424
6741 Dry cleaning, laundry and related occupations	2	0	-2	-4	-4	-5	-5	-4	-3	-3	-3	-31
6742 Other service support occupations, n.e.c.	-4	0	-2	-3	-3	-4	-4	-3	-2	-2	-2	-29
7301 Contractors and supervisors, mechanic trades	1	-1	-4	-5	-4	-5	-5	-4	-3	-3	-3	-36
7315 Aircraft mechanics and aircraft inspectors	0	-6	-8	-9	-9	-9	-8	-7	-4	-4	-4	-68
7514 Delivery and courier service drivers	6	-3	-13	-19	-20	-21	-20	-15	-10	-10	-10	-135

Geographic Area - South East	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
7534 Air transport ramp attendants	0	-2	-2	-2	-2	-2	-2	-2	-1	-1	-1	-17
8252 Agricultural service contractors, farm supervisors and specialized livestock workers	1	-1	-2	-2	-2	-2	-2	-2	-1	-1	-1	-15
8431 General farm workers	-2	9	-10	-19	-20	-23	-21	-16	-10	-10	-10	-132
8612 Landscaping and grounds maintenance labourers	-38	8	-24	-44	-47	-52	-50	-39	-27	-26	-26	-365

Table 1: Labour force supply less demand, South East region²⁸

Labour demand due to growth & attrition

Table 2 presents the estimated total number of job openings for the Kootenay^{viii} and South East region between 2017 and 2025 due to expansion and replacement. Provincially, by 2025 it is expected that 69% of job openings will be due to retirements and deaths.¹²

In the Kootenay Development Region, the top occupations expected to generate the largest number of new openings (full year job openings) between the years 2017 – 2025 include: retail and wholesale trade managers, retail salespersons, and administrative officers.

Kootenay Development Region	Total Job Openings between 2017 and 2025
0015 Senior managers - trade, broadcasting and other services, n.e.c.	64
0016 Senior managers - construction, transportation, production and utilities	71
0111 Financial managers	48
0112 Human resources managers	28
0511 Library, archive, museum and art gallery managers	10
0512 Managers - publishing, motion pictures, broadcasting and performing arts	40
0513 Recreation, sports and fitness program and service directors	10
0601 Corporate sales managers	69
0621 Retail and wholesale trade managers	1094
0631 Restaurant and food service managers	173
0632 Accommodation service managers	121
0714 Facility operation and maintenance managers	39
0821 Managers in agriculture	93
1111 Financial auditors and accountants	132
1121 Human resources professionals	11
1122 Professional occupations in business management consulting	36
1123 Professional occupations in advertising, marketing and public relations	9
1221 Administrative officers	534
1311 Accounting technicians and bookkeepers	387
1411 General office support workers	217
1414 Receptionists	216
1431 Accounting and related clerks	72
1522 Storekeepers and partspersons	114
2133 Electrical and electronics engineers	14
2171 Information systems analysts and consultants	31
2225 Landscape and horticulture technicians and specialists	38
2271 Air pilots, flight engineers and flying instructors	35
4021 College and other vocational instructors	320
4112 Lawyers and Quebec notaries	21
4163 Business development officers and marketing researchers and consultants	2

^{viii} The Kootenay region represents a slightly smaller geographic area than the Columbia Basin-Boundary region in so far as it excludes Valemount, Revelstoke and Golden.

Kootenay Development Region		Total Job Openings between 2017 and 2025
4167 Recreation, sports and fitness policy researchers, consultants and program officers		0
5121 Authors and writers		15
5133 Musicians and singers		44
5136 Painters, sculptors and other visual artists		58
5212 Technical occupations related to museums and art galleries		1
5244 Artisans and crafts persons		56
5252 Coaches		1
5254 Program leaders and instructors in recreation, sport and fitness		84
6311 Food service supervisors		29
6312 Executive housekeepers		41
6313 Accommodation, travel, tourism and related services supervisors		19
6321 Chefs		69
6322 Cooks		285
6332 Bakers		108
6411 Sales and account representatives - wholesale trade (non-technical)		135
6421 Retail sales persons		844
6511 Maitres d'hôtel and hosts/hostesses		4
6512 Bartenders		21
6513 Food and beverage servers		195
6523 Airline ticket and service agents		5
6525 Hotel front desk clerks		94
6533 Casino occupations		9
6541 Security guards and related security service occupations		76
6552 Other customer and information services representatives		69
6611 Cashiers		377
6621 Service station attendants		49
6711 Food counter attendants, kitchen helpers and related support occupations		278
6722 Operators and attendants in amusement, recreation and sport		61
6731 Light duty cleaners		492
6733 Janitors, caretakers and building superintendents		453
7301 Contractors and supervisors, mechanic trades		23
7514 Delivery and courier service drivers		65
8431 General farm workers		40
8612 Landscaping and grounds maintenance labourers		210
South East Development Region^{ix}		
0124 Advertising, marketing and public relations managers		218
0731 Managers in transportation		242
1226 Conference and event planners		63
2244 Aircraft instrument, electrical and avionics mechanics, technicians and inspectors		73
5112 Conservators and curators		0

^{ix} Data for these occupations is only available at the South East Region level.

Kootenay Development Region		Total Job Openings between 2017 and 2025
5135 Actors and comedians		0
6316 Other services supervisors		48
6522 Purser and flight attendants		98
6531 Tour and travel guides		21
6721 Support occupations in accommodation, travel and facilities set-up services		19
6741 Dry cleaning, laundry and related occupations		154
7315 Aircraft mechanics and aircraft inspectors		322
7534 Air transport ramp attendants		54
8252 Agricultural service contractors, farm supervisors and specialized livestock workers		65

Table 2: Summary of potential job openings due to growth and attrition (in full-year jobs) by industry and occupation in mining-related industries, Kootenay and South East region, 2017-2025,²⁹

Conclusion

The purpose of this report is to identify current tourism sector market trends and issues, including current and projected labour market needs to help workforce development partners within the Columbia Basin-Boundary region understand and respond to changing labour market demands.

In total, there are an anticipated 2,168 job openings forecast for the Tourism and Hospitality sector by 2025 in the Kootenay Development Region. The Accommodation Services subsector will see the most number of job openings with 894 positions, accounting for 5% of all jobs in the province in that subsector by 2025. At a subsector level, job openings will be highest in the accommodation services (894), food services and drinking places (635), amusement, gambling and recreation (412), performing arts and spectator sports (141), air transportation (43), and heritage institutions (43).

Projected job *openings* for specific occupations relating to the tourism sector in the Kootenay Development Region between 2017 and 2025 are highest for retail and wholesale trade managers (1,094), retail salesperson (844), and administrative officers (534). Retail salespersons (-1225), retail and wholesale trade managers (-777), food counter attendants, kitchen helpers and related support occupations (-666) are the occupations with the highest, sustained *demand* in the tourism sector until 2025 in the South East region.

The *British Columbia 2025 Labour Market Outlook* (2016) notes that provincially sales and service occupations, particularly in retail trade, offer significant opportunities for people entering the labour force and half of total projected job openings are expected to occur in the retail trade, arts, recreation, and hospitality industries (in addition to health and social assistance and professional services).²¹

Appendix A – References & Resources

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Appendix B - BC Tourism Sector NAICS & NOC Codes

BC Tourism Sector NAICS Codes

NAICS	Description
4811	<ul style="list-style-type: none"> Scheduled air transport
4812	<ul style="list-style-type: none"> Non-scheduled air transport
4821	<ul style="list-style-type: none"> Rail transportation <ul style="list-style-type: none"> of which: <ul style="list-style-type: none"> Tourism sub-industries <ul style="list-style-type: none"> 482114 Passenger rail transportation Non-tourism sub-industries <ul style="list-style-type: none"> 482112 Short-haul freight rail transportation 482113 Mainline freight rail transportation
4831	<ul style="list-style-type: none"> Deep sea, coastal and great lakes water transportation
4832	<ul style="list-style-type: none"> Inland water transportation
4851	<ul style="list-style-type: none"> Urban transit systems
4852	<ul style="list-style-type: none"> Interurban and rural bus transportation
4853	<ul style="list-style-type: none"> Taxi and limousine service
4854	<ul style="list-style-type: none"> School and employee bus transportation
4855	<ul style="list-style-type: none"> Charter bus industry
4859	<ul style="list-style-type: none"> Other transit and ground passenger transportation
4871	<ul style="list-style-type: none"> Scenic and sightseeing transportation, land
4872	<ul style="list-style-type: none"> Scenic and sightseeing transportation, water
4879	<ul style="list-style-type: none"> Scenic and sightseeing transportation, other
532111	<ul style="list-style-type: none"> Passenger car rental
532120	<ul style="list-style-type: none"> Truck, utility trailer and RV (recreational vehicle) rental and leasing
7211	<ul style="list-style-type: none"> Traveller accommodation <ul style="list-style-type: none"> 72111 Hotels 72112 Motor Hotels 72113 Resorts 72113 Motels
7212	<ul style="list-style-type: none"> RV (recreational vehicle) parks and recreational camps <ul style="list-style-type: none"> 721211 RV (recreational vehicle) parks and campgrounds 721212 Hunting and fishing camps 721213 Recreational (except hunting and fishing) and vacation camps
7220	<ul style="list-style-type: none"> Food services and drinking places <ul style="list-style-type: none"> 72211 Full-service restaurants 72221 Limited-service eating places 72241 Drinking places (alcoholic beverages)
51213	<ul style="list-style-type: none"> Motion picture and video exhibition
7110	<ul style="list-style-type: none"> Performing arts, spectator sports and related industries <ul style="list-style-type: none"> 7111 Performing arts companies 7112 Spectator sports 7115 Independent artists, writers and performers
7121	<ul style="list-style-type: none"> Heritage institutions
713A1	<ul style="list-style-type: none"> Amusement and recreation industries
7131	<ul style="list-style-type: none"> Amusement parks and arcades

	•
7132	• Gambling industries
	•
7139	<ul style="list-style-type: none"> • Other amusement and recreation industries <ul style="list-style-type: none"> ○ 71391 Golf courses and country clubs ○ 71392 Skiing facilities ○ 71393 Marinas ○ 71395 Bowling centres ○ 71399 All other amusement and recreation industries
5615	• Travel arrangements and reservation services

Tourism Sector National Occupation Classification (NOC) Codes

Occupations	Priority Occupation	Code
Sales & Service Occupations	• Retail sales supervisors	6211
	• Technical sales specialist-wholesale trade	6221
	• Retail & wholesale buyers	6222
	• Sales & account representatives - wholesale trade	6411
	• Retail salesperson	6421
	• Food Service supervisors	6311
	• Executive housekeepers	6312
	• Accommodation, travel, tourism & related services supervisors	6313
	• Customer & information service supervisors	6314
	• Cleaning supervisors	6315
	• Other services supervisors	6316
	• Chefs	6321
	• Cooks	6322
	• Butchers, meat cutters & fishmongers – retail & wholesale	6331
	• Bakers	6332
	• Maîtres d'hôtel & hosts/hostesses	6511
	• Bartenders	6512
	• Food & beverage servers	6513
	• Hotel front desk clerks	6525
	• Travel counsellors	6521
	• Tour & travel guides	6531
	• Outdoor sport & recreational guides	6532
	• Casino occupations	6533
	• Security guards & related security service occupations	6541
	• Customer service representatives - financial institutions	6551
	• Other customer & information services representatives	6552
	• Esthetician, electrologists & related occupations	6562
	• Cashiers	6611
	• Service station attendants	6621
	• Store stockers, clerks & order fillers	6622
	• Other sales related occupations	6623
	• Food Counter attendants, kitchen helpers & related support occupations	6711
	• Support occupations in accommodation, travel & facilities set-up services	6721
	• Operators & attendants in amusement, recreation & sport	6722
		6731
		6732

	<ul style="list-style-type: none"> • Light duty cleaners • Specialized cleaners • Janitors, caretakers & building superintendents • Dry cleaning, laundry & related occupations • Other service support occupations 	6733 6741 6742
Transportation	<ul style="list-style-type: none"> • Air Pilots, flight engineers & flying instructors • Air traffic controllers & related occupations • Railway traffic controllers and marine traffic regulators • Deck officers, water transport • Engineer officers, water transport • Bus drivers, subway operators and other transit operators • Taxi and limousine drivers and chauffeurs • Purser and flight attendants • Airline ticket & service agents • Ground & water transportation agents, cargo service representatives & related clerks • Aircraft mechanics and aircraft inspectors • Air transport ramp attendants • All other air transportation occupations 	2271 2272 2275 2273 2274 7512 7513 6522 6523 6524 7315 7437
Other transportation	<ul style="list-style-type: none"> • Transportation managers • Railway and yard locomotive engineers • Railway conductors and brakemen/women • Motor vehicle mechanics, technicians, and mechanical repairers • Bus drivers and subway and other transit operators • Taxi and limousine drivers and chauffeurs • All other transportation occupations (excl. air) 	0713 7361 7362 7321 7412 7413
Art, Culture, Recreation & Sport	<ul style="list-style-type: none"> • Conservators and curators • Technical occupations related to museums and art galleries • Archivists • Producers, directors, choreographers and related occupations • Conductors, composers and arrangers • Musicians and singers • Dancers • Actors and comedians • Painters, sculptors and other visual artists • Support occupations in motion pictures, broadcasting, photography and the performing arts • Theatre, fashion, exhibit and other creative designers • Artisans and crafts persons • Athletes • Coaches • Sports officials and referees • Program leaders and instructors in recreation, sport and fitness 	5112 5212 5113 5131 5132 5133 5134 5135 5136 5227 5243 5244 5251 5252 5253 5254
	<ul style="list-style-type: none"> • Accommodation service managers 	632 5254

Accommodation	<ul style="list-style-type: none"> • Program leaders and instructors in recreation, sport, and fitness • Chefs • Cooks • Bartenders • Food and beverage servers • Hotel front desk clerks • Light duty cleaners • Janitors, caretakers, and building superintendents • Food counter attendants, kitchen helpers, and related occupations 	6241 6242 6452 6453 6435 6661 6663 6641
Food and beverage services	<ul style="list-style-type: none"> • Restaurant and food service managers • Food service supervisors • Cashiers • Chefs • Cooks • Maîtres d'hôtel and hosts/hostesses • Bartenders • Food and beverage servers • Bakers • Food counter attendants, kitchen helpers, and related occupations • Delivery drivers 	631 6212 6611 6241 6451 6452 6453 6252 6641 7414
Recreation & entertainment	<ul style="list-style-type: none"> • Recreation and sport program and service directors • Technical occupations related to museums and art galleries • Program leaders and instructors in recreation and sport • Retail salespersons and sales clerks • Cashiers • Security guards and related occupations • Casino occupations • Attendants in amusement, recreation, and sport • Janitors, caretakers and building superintendents • Food counter attendants, kitchen helpers, and related occupations • Landscaping and grounds maintenance labourers • All other recreation and entertainment occupations 	531 5212 5254 6421 6611 6651 6443
Travel Services	Retail trade managers Travel counsellors All other travel services occupations	621 6431