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# Measuring Employment in the Tourism Industries Beyond the Tourism Satellite Account: A Case Study of Canada

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Department  
of Statistics

**International Labour Organization**

***Measuring Employment in the Tourism Industries Beyond  
the Tourism Satellite Account: A Case Study of Canada***

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**Geneva, 2014**

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## Preface

The International Labour Organization (ILO) and the United Nations World Tourism Organization (UNWTO) jointly consider tourism to be one of the most dynamic sectors of economic activity in modern times, generating a wide range of benefits for tourism host and tourist-generating countries and destinations, including employment generation, foreign exchange earnings and contribution to GDP” (ILO, 2010). They also note that, despite recent measurement advances in the specialized fields of tourism statistics and tourism macroeconomics, employment in the tourism industries, and the economic value of tourism in terms of employment as a source of productive labour, remain inadequately measured and insufficiently studied (ILO, 2010).

To fill this gap, the ILO and UNWTO have joined their efforts to improve statistical data on tourism related employment. This collaboration was formalized through a Memorandum of Understanding between the two organizations culminating in the implementation of a Joint ILO/UNWTO Project on the Measurement of Employment and Decent Work in the Tourism Industries. The joint collaborative project covers three major activities:

- (i) Preparation and publication of the joint ILO/UNWTO Technical Guide on Best Practices for Measuring Employment in the Tourism Industries;
- (ii) Testing the applicability of the recommendations included in the aforementioned Technical Guide in countries with developed statistical systems and tourism services;
- (iii) Measuring decent work in the tourism industries<sup>1</sup>.

The main focus of the joint project is to carry out in-depth studies on possible ways of applying the latest international recommendations in the field of tourism statistics (IRTS, 2008) to produce new sets of data on employment in the tourism industries beyond the Tourism Satellite Account (TSA). Consistent with the ILO’s decent work objective (iii) noted above, another objective is to present a comprehensive and detailed description of individual countries’ methodologies for measuring aspects of tourism related employment, primarily in terms the persons employed in tourism industries and their personal and work characteristics, rather than just in terms of jobs. Lastly, it is expected that individual country experiences, including the results of this study, will be used to lay the foundation for a future that includes more readily available, consistent, and comprehensive data on employment in the tourism industries beyond those measures specified in the TSA (Chernyshev, 2009).

While Indonesia and Brazil were selected as initial case studies under activity (ii) of the joint project, Canada has also been identified and selected as an additional country that that has developed exemplary procedures for measuring employment in the tourism industries in addition to having a

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<sup>1</sup> For more information on the ILO’s Decent Work Agenda, see: [http://www.ilo.org/global/About theILO/Mainpillars/WhatIsDecentWork/lang-en/index.htm](http://www.ilo.org/global/About%20the%20ILO/Mainpillars/WhatIsDecentWork/lang-en/index.htm)

leading role in contributing to the development of tourism statistics and the TSA in particular. The ILO and UNWTO view Canada as a country that has developed one of the best set of procedures in the world for measuring employment in the tourism industries both within the framework of the TSA (Table 7) as well as beyond the TSA. Accordingly, Canada has been selected as a third country case study (ILO and UNWTO, 2011).

This case study of Canada, conceived of and guided by Mr. Igor Chernyshev, ILO Department of Statistics, was prepared by Mr. Scott Meis, Special Advisor on Labor Market Information and Research to the Canadian Tourism Human Resource Council with the support of Mrs. Wendy Swedlove, President of the Council.

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## Acknowledgements and Disclaimer

This best practices case study report was prepared at the invitation of the International Labour Office and under the authority of the Canadian Tourism Human Resource Council based on information from a variety of sources including published reports from CTHRC, Statistics Canada and ILO; various CTHRC internal studies and data bases, Statistics Canada national statistical data bases, and other secondary source materials. Financial support was provided through general funding from Human Resources and Skills Development Canada for the Canadian Sector Council Program and the Canadian Tourism Human Resource Council, in particular; as well as a supplementary external collaboration contract with the ILO Department of Statistics.

Suggestions and comments from the ILO Department of Statistics as well as staff with the Satellite Accounts and Special Studies Section of the National Economic Accounts Division at Statistics Canada were very helpful and valuable in finalizing the report text. It was prepared by Scott Meis (Special Advisor, Labour Market Information and Research, Canadian Tourism Human Resource Council), with contributions by Jennifer Hendry and Calum MacDonald and Angela St.Aubin (Research, Canadian Tourism Human Resource Council), and Demi Kotsovos (Satellite Accounts and Special Studies, National Economic Accounts Division, Statistics Canada), and was reviewed by Chris Jackson (National Economic Accounts Division, Statistics Canada) and Igor Chernyshev (formerly ILO Department of Statistics).

Lastly, the author is indebted to members of the various research units that produced the primary research assets and results described in this best practice experience paper. They include the Research team at CTHRC (Jennifer Hendry and Calum MacDonald), as well as members of the Satellite Accounts and Special Studies, National Economic Accounts Division at Statistics Canada.

Notwithstanding the assistance and contributions noted above, the responsibility of the information and opinions included in this report rests solely with the author. Furthermore, their publication in the report does not constitute an endorsement by the ILO, Statistics Canada, or the Canadian Tourism Human Resource Council, of the opinions expressed herein. The author also affirms that he has sought and obtained permission of Statistics Canada<sup>2</sup> and the Canadian Tourism Human Resource Council to cite and reproduce their original source materials, with appropriate citations of the specific sources.

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<sup>2</sup> See the Statistics Canada Open Licence Agreement, <http://www.statcan.gc.ca/eng/reference/licence-eng>.

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## List of Abbreviations

CTRI	Canadian Tourism Research Institute of the Conference Board of Canada
CMA	Census Metropolitan Area
CPA	Canadian Productivity Accounts
CSNA	Canadian System of National Accounts
CTA	characteristic tourism activities
CTHRC	Canadian Tourism Human Resource Council
CTSA	Canadian Tourism Satellite Account
HRM	Human Resource Module
HRSDC	Human Resources and Skills Development Canada
HRO	human resource organization
ILO	International Labour Organization (Office)
IRTS	International Recommendations for Tourism Statistics (1993, 2008)
ISCO	International Standard Classification of Occupations
ITS	International Travel Survey
LFS	Labour Force Survey
MOU	memorandum of understanding
NAICS	North American Industry Classification System
NOC	National Occupation Classification
NSO	national statistics office
NTA	national tourism administration
NTI	National Tourism Indicators
NTO	national tourism organization
OECD	Organization for Economic Cooperation and Development
SEPH	Survey of Employment, Payroll and Hours
THRO	tourism human resource organization
TLMI	tourism labour market information
TLMIS	Tourism Labour Market Information System
TSA	Tourism Satellite Account
TSA: HRM	Tourism Satellite Account: Human Resource Module
TSA: RMF	Tourism Satellite Account: Recommended Methodological Framework (2001, 2008)
TSRC	Travel Survey of Residents of Canada
UNWTO	United Nations World Tourism Organizations (World Tourism Organization (WTO))
WES	Workplace and Employment Survey

## Symbols

*The following standard symbols are used in data tables presented in CTHRC and Statistics Canada publications referenced in this case study report:*

- . not available for any reference period
- .. not available for a specific reference period
- ... not applicable
- x suppressed to meet the confidentiality requirements of the Canadian Statistics Act

## Executive Summary

The combination of Canada's long history of tourism development, its geographic grandeur, northern climate, cultural diversity, proximity to the United States, and ties to Europe and Asia make it both a leading origin and destination for international tourism. In terms of volume and economic significance, however, domestic tourism is more important, amounting for more than 80% of all revenue from tourism. In 2011, domestic, inbound, and outbound tourism together generated C\$78.7 billion in total accumulated revenue, contributing C\$31.1 billion, or 1.9%, to Canada's GDP, supporting over 157,000 tourism businesses, and generating C\$21.4 billion CAD in government revenue from direct and indirect taxes and fees.

From an employment perspective, a little more than 10 percent of the Canadian workforce is employed in the Canadian tourism industries including disproportionately larger shares of youth, women, immigrants, and the less educated than in the overall economy. In 2012 employment in tourism industries provided 1.7 million jobs, or 9.4% of all jobs in Canada, and grew by 1.5%, outpacing job growth in the total economy. Tourism employment in tourism industries, on the other hand, that is jobs directly supported by visitor consumption, totalled 496,000 in 2012, also up by 1.4% from the previous year, but less than the growth rate for all jobs in tourism industries indicating slightly higher growth in jobs supported by local consumption. Meanwhile, in the same year, tourism employment in the overall economy totalled 603,400 jobs, with 18% or 107,400 jobs occurring in non-tourism industries of the Canadian economy<sup>3</sup>.

Tourism is well developed in Canada with a mature social infrastructure, within many different segments of the private, public, and not-for-profit sectors, including government departments, trades, industry advocacy groups, and destination marketing organizations. Tourism education and human resources management in Canada are also relatively mature with many tourism-related programs offered by both public and private institutions. Canada has also been a pioneer in tourism workforce development, producing relevant labour market information, sector-specific qualifications frameworks, numerous occupational standards and education and training resources; all directed towards increased industry relevance and labor mobility throughout Canadian tourism industries in all parts of the country.

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<sup>3</sup> As described in section 1.2, the terms *Canadian workforce* and *tourism workforce* refer respectively to all persons employed in the Canadian economy and the Canadian tourism industries; whereas, *employment in the Canadian economy and the tourism industries* refer respectively to all jobs in the Canadian economy and all jobs in the Canadian tourism industries. These measures are not exactly equal to the immediate previous estimate since, as discussed in Section 8, employed persons may hold multiple jobs both inside and outside the tourism industries. *Tourism employment*, on the other hand, refers to jobs strictly related to the goods and services acquired by visitors and produced by either tourism industries or other industries

The 2011 Federal Tourism Strategy recognizes the importance of skills and labour as one of the four pillars of the new all-of-government coordinated tourism development strategy in response to emerging concerns about skills gaps and future labour shortages supported by comprehensive labour market information and insights regarding the significance of employment aspects of the Canadian tourism industries. The strategy specifies “Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality” as a priority focus of current and future tourism-specific government policy initiatives.

This case study review of the Canadian statistics on employment in the tourism industries demonstrates that Canada has a fully developed and highly advanced set of statistical procedures and derivative applications for measuring and analyzing a multitude of employment aspects in the tourism industries. It also has many associated information products providing a comprehensive picture of current and historical performance of employment aspects of tourism in Canada. The latest new information product provides a prototype series of quarterly aggregate indicators of jobs relating to employment in the tourism industries, that are fully integrated and reconciled with other comparable information in the System of National Accounts (SNA). These key variables as well as other selected categorical work characteristic variables including industry, occupation, job type, full time/part time; plus, three selected personal characteristics (age group, gender, and immigrant status) are drawn mainly from the Productivity Accounts of the SNA, the Labour Force Survey (LFS), and the Survey of Employment Payroll and Hours. Compilations of selected variables from these data sources are updated on an annual basis as part of the Human Resource Module of the Tourism Satellite Account, which is also fully integrated and reconciled with the System of National Accounts. Data on other more extensive personal characteristics of persons working in the tourism industries (including location of residence, age, place of birth, mother tongue, education status, education attainment, membership in equity groups and a more detailed classification of occupations) are obtained from secondary analysis of census data updated once every five years. Other supplementary data on unemployment levels and rates in the tourism industries are produced on a monthly basis from custom tabulations of monthly LFS data.

Industry coverage of all data sources includes twenty-nine tourism industries identified and defined in the Canadian Tourism Satellite Account. For analysis purposes, all these data are generally classified into five major industry groups – transportation, accommodation, food and beverage services, recreation and entertainment and travel services. For some analyses six industry groups are used, with the transportation industry group further broken down into two sub-groups -- air transportation and all other transportation industries.

Geographic coverage of provincial and territorial jurisdictions, as well as major municipalities is available as reported for some analytical procedures, such as census data and unemployment levels and rates. Other analytical procedures and associated data sources, such as the Human Resource Module, are still under development at the sub-national level.

The Canadian case study reviews in detail the many methodologies and data sources used to obtain Canadian data, and to analyze it to derive useful information on employment in tourism industries and the characteristics of workers in the tourism industries. One of the most recent advances highlighted in the review is the innovative portfolio of tourism-specific labour outlook models and

associated labour and employment outlook forecasts. Combined with associated policy and exogenous shock impact scenarios, this innovation provides additional analysis and information tools for assessing possible employment futures in the tourism industries.

In addition to highlighting the methodologies used to produce information and insights on employment aspects of tourism the review also provides illustrative results and interpretations of their significance relative to points of comparison within the tourism sector and the overall Canadian work force. Several, among many important findings and insights of the review study, are particularly noteworthy:

- Each of the two major employment conceptual frameworks -- *employment in tourism industries and tourism employment* is useful in revealing different aspects and dimensions of the employment effects of tourism, and both ultimately serve different information needs of end-users.
- The reported employment effects of tourism in a fully developed complex economy like Canada's are relatively large in comparison with the 1.9% share observed for tourism's contribution to Canada's GDP in 2012.
- The characteristics of both jobs and persons working in the tourism industries are observed to differ substantially from the overall economy, with employment in tourism industries showing lower levels of self employment, higher levels of part-time and seasonal work, shorter work hours and lower compensation.
- In terms of observed personal characteristics too, both younger workers (aged 15 to 24) and older workers (age 45 or older), lesser educated workers, women and immigrants are reported as important sources of labour for the tourism industries; both in terms of their observed numbers and their shares of all employee jobs.
- At the same time, persons working in the tourism industries are repeatedly found to be heterogeneous in the distribution of their social and work characteristics across tourism industry groups. As reported in this review, this finding applies for all observed social characteristics including gender, age, school attendance, education, mother tongue, place of birth, and equity group membership.
- Similarly, all reported characteristics of jobs and occupations are also found to be heterogeneously distributed across the various tourism industry groups.

The occupations of persons employed in the tourism industries are observed to be dispersed across a wide range of specific occupations. The three most common occupations of persons employed in tourism industries are all found primarily in the food and beverage services and accommodation industry groups; namely food counter attendants, kitchen helpers and related occupations, food and beverage servers and cooks.

- Similarly, in terms of jobs in the tourism industries, five occupations dominate and count for approximately half of all employee jobs: food-counter attendants, kitchen helpers and related occupations, food and beverage servers, cooks, cashiers and restaurant and food service managers. Furthermore, nine out of ten of the top occupations in the Canadian tourism industries, are concentrated in the food and beverage services industries.
- Total employment in the tourism industries in Canada in 2012 is currently expanding, with all but travel services posting recent job gains.
- Looking forward, given current trends in tourism demand and labour over the long term, the study reports that the tourism industries in Canada are facing a potentially severe shortage of labour over the next 15 years. The consequences of the forecasted labour shortages—such as the inability to meet potential demand—could cost Canadian tourism businesses billions of dollars.

Some recommendations for others interested in emulating the Canadian experience are included in the review study, namely:

A. Other countries/jurisdictions -- Follow the 10 step path to the development of complete and comprehensive data and information on the employment aspects of tourism recommended by Canada as a result of its experience in developing its Tourism Labour Market Information System.

B. ILO in collaboration with UNWTO -- Develop a tourism-specific thematic view of the International Standard Classification of Occupations (ISCO).

Ottawa, November 2013  
Scott M. Meis

## 1. Introduction

The goal of this case study is to identify, describe and explain the Canadian practices of gathering, compiling, estimating, analyzing and describing tourism labour market information regarding persons employed in tourism industries primarily in terms of the characteristics of tourism workers rather than only in terms of jobs. As requested by the ILO, the particular personal and work characteristics featured in this case study include those found in the 2006 Canadian Population Census and the Canadian Labour Force Survey (LFS) such as: employment status, type of work, gender, occupation, educational attainment, membership in equity groups and seasonality of employment. Other work characteristics featured in this case study are derived from the LFS and the Canadian Survey of Employment, Payroll and Hours (SEPH) including union status, duration and hours of work, seasonality of work, hours of work and salaries and wages. Where feasible the data presentation at both national and regional levels illustrates the level of geographic detail that is supported by the featured demographic and job characteristics profiling methodologies as well as other statistical compilation, estimation, and analysis instruments.

### 1.1 Purpose, objectives and focus

It is intended that this description of the Canadian experience in measuring employment in tourism industries and the results of this study will assist others to broaden the geographical coverage of statistics on employment in tourism industries and to improve their capacities to produce more readily available, consistent, and comparable data on employment in the tourism industries beyond those measures specified in the TSA. As a result, this study is addressed not only to the ILO and the UNWTO; but also to other national producers and users of tourism statistics who would like to extend their methods used for tourism data collection and information generation to the subjects of tourism-related employment, work and labour characteristics of workers in the tourism industries. This study is also addressed to tourism policy makers and tourism development specialists who wish to better understand the world of work in tourism. It is addressed as well to tourism stakeholders who want to make better use of available and improved data sources to inform and strengthen tourism-specific labour market policies and tourism human resource enhancement programmes. And lastly, the recommendations from this case study of Canada may be used by tourism researchers and industry stakeholders to improve the scope and coverage of tourism employment and labour information within their national and regional systems of tourism statistics and tourism labour market information.

This Canadian case study describes the methodologies and data sources used to obtain Canadian data and derive useful information on employment in tourism industries and the characteristics of workers of the Canadian tourism sector. With respect to the characteristics of the persons employed in tourism industries, as noted previously, the study classifies them by sex, age, status in employment (employee, employer, and own-account workers), occupation and educational attainment. It also focuses on the characteristics of the job itself such as the type of employer establishment, the duration and seasonality of employment, hours of work and wages and salaries involved. In addition to highlighting the methodologies used to produce this information, the study also provides illustrative results and interpretations of their significance relative to points of comparison within the tourism sector and the overall Canadian economy and work force.

Canada, the geographic focus of this study, is the world's second largest country (10 million km<sup>2</sup> or 3,500,000 mi<sup>2</sup>) with ten provinces and three territories (Figure 1), two official languages (English and French), and a population of 35.1 million, has the 14<sup>th</sup> largest economy and 9th highest GDP per capita. The combination of its geographic grandeur, northern climate, cultural diversity, well-developed infrastructure, proximity to the United States, and ties to Europe and Asia make it the 7th leading origin and 18th leading destination for international tourism (UNWTO, 2013), (Meis, 2013:1).

**Figure 1. Map of Canada**



The beginnings of its tourism date back to the developments of the Canadian national parks in 1885 and the Canadian Pacific Railway through its rail and steamship services and its marketing campaigns targeted to Europeans and Americans in the late 19<sup>th</sup> and early 20<sup>th</sup> centuries. Currently, tourism is fully developed in Canada with a mature social infrastructure, within many different segments of the private, public, and not-for-profit sectors, including government departments, trades, industry advocacy groups, and destination marketing organizations. The majority of businesses (98%) consist of small and medium-sized enterprises, but the large hotel chains, airlines, and tour operators remain important (Meis, 2013:1).

As result of the current and past history of tourism development and promotion activities in Canada, the country ranked 6th in the world in international tourism expenditures in 2011, and 18<sup>th</sup> on measures of its demand, accounting for 1.5% of arrivals and receipts. In 2011, it ranked 8<sup>th</sup> in

obtained yield, registering C\$1,032 (US\$1,043)<sup>4</sup> per trip, an increase of 183% since 1996 (UNWTO 2013). In the same year, Canada earned C\$15.3 billion (US\$15.5 billion) from sales of goods and services to 24.1 million international arrivals, making tourism its largest service export (CTC 2013:14). Domestic tourism is more significant, amounting to C\$63.6 billion from 318 million person-trips, accounting for 82% of all revenue from tourism (Statistics Canada 2012a).

Domestic, inbound, and outbound tourism together generate \$78.9 billion C\$ in total accumulated 2011 revenue, contributing \$31.1 billion C\$, or 1.9%, to Canada's GDP (Statistics Canada 2012a), supporting over 157,000 tourism businesses (CTC 2013:1), and generating \$21.4 billion C\$ in government revenue from direct and indirect taxes and fees, or 27 cents on every tourism dollar (Morissette 2013:4).

Canada also has a well-developed tourism education and training infrastructure, with more than 1,000 tourism-related programs offered by approximately 100 public (including 30 universities, some being leaders in tourism research and scholarship worldwide) and 200-300 private institutions. The organization that has sponsored this study, Canadian Tourism Human Resource Council (a unique national coordinating membership organization spanning industry, government, education and labor) has pioneered Canadian workforce development, producing relevant labour market information, sector-specific qualifications frameworks, 50+ occupational standards and 600+ education and training resources; all directed towards increased industry relevance and labor mobility throughout Canadian tourism industries.(Meis, 2013:1).

## 1.2 Employment in tourism industries and tourism employment

This case study and the methodologies and data generated in the Canadian experience apply the main concepts, measures and definitions relating to the characterization of the employment dimension of tourism identified in the most recent version of the established international standards for tourism statistics, the *International Recommendations for Tourism Statistics 2008*, including: *employment in tourism industries, tourism employment, persons employed, jobs, hours worked, full-time equivalent employment, labour income, salaries and wages*. The various conceptual definitions of all these different aspects of the employment dimension of tourism are given, where appropriate to particular subject discussions, throughout the text of the case study, as well as in Appendix I, Terminology. However two key concepts – employment in tourism industries and tourism employment – deserve special treatment here in the introduction as they are linked with two fundamentally different conceptual perspectives of the employment dimensions of tourism. Throughout the following material on Canadian experiences, methodologies and results in measuring the employment dimension of tourism, the concept of *employment in tourism industries* refers to all jobs and persons engaged in both characteristic tourism activities and non-tourism-characteristic activities in all establishments in tourism industries. Furthermore, the concept of

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<sup>4</sup> All monetary values in this report are expressed in Canadian dollars, except where noted otherwise. The original estimates derived in this case from UNWTO published data have been converted to their Canadian dollar equivalent values.

*tourism industries* refers to industries whose main activity is identified as a tourism characteristic activity/industry (or a country-specific tourism characteristic activity) (IRTS 2008, para. 7.4). This is a primary focus of this particular case study on the Canadian experiences in measuring the employment dimension of tourism beyond the tourism satellite account.

A secondary focus of the case study is the concept of *tourism employment*, which in accordance with the IRTS 2008, refers to “employment strictly related to the goods and services acquired by visitors and produced by either tourism industries or other industries” (IRTS 2008, para. 7.3). This alternative perspective of the employment dimension of tourism is included in the case study because it is the perspective and employment measurement concept adopted and applied by the Canadian tourism satellite account. Thus, within the CTSA framework, tourism employment is a measure of the number of jobs directly attributable to tourism demand in tourism and non-tourism industries, held by the self-employed, employees and unpaid family workers. For example, in the food and beverage services industry, only those jobs that are directly associated with tourism (17.2%) are counted in the CTSA as jobs generated by, or attributable to tourism<sup>5</sup>. On the other hand, jobs generated in agriculture to support production in the food and beverage services industry (i.e. indirect employment) are not included. This alternative tourism employment perspective is included within this Canadian case study in order to highlight the specific results – the number of jobs and labour income directly attributable to tourism – obtained from the human resource dimension of the CTSA, which focuses mainly on monetary aggregates associated with tourism demand and supply and the measurement of GDP (Kotsovos, 2007)<sup>6</sup>.

### 1.3 Structure

*Measuring Employment in the Tourism Industries Beyond the Tourism Satellite Account: A Case Study of Canada* consists of eleven sections and four appendices. Brief synopses of these sections follow:

- 1) Section 1 introduces the purpose, objectives and focus of the case study.
- 2) Section 2 presents the importance of measuring employment work and labour characteristics of tourism.
- 3) Section 3 presents an overview of the collection and analysis of employment information within the Canadian System of Tourism Statistics.
- 4) Section 4 describes the contributions of the TSA to measuring tourism related employment in Canada.

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<sup>5</sup> See the *Canadian Tourism Satellite Account, 2006, December 31, 2011, Unpublished methodological note*. (Ottawa: Statistics Canada, 2012).

<sup>6</sup>See Kotsovos, D. *Canadian Tourism Satellite. Account Handbook*, Statistics Canada, 2007, pages 7-8.

- 5) Section 5 describes Canada's initial responses to overcoming the human resource information requirements coverage limitations of the CTSA including the overall approach adopted, the concepts and definitions applied, the data sources and methods used, and the key statistical results produced.
- 6) Section 6 presents the key results and findings that emerged from the described initial approaches in moving beyond the TSA to provide more extensive information on the characteristics and work of persons employed in tourism industries in Canada including: the employment size of businesses in Canadian tourism industries, aggregate information on the number of persons employed in Canadian tourism Industries, the demographic characteristics of persons employed in tourism industries and the labour characteristics of tourism workers.
- 7) Section 7 presents the second major step taken by Canada in moving beyond the limitations of the TSA in measuring employment in tourism industries, the Canadian Tourism Human Resource Module (HRM) including the key concepts and definitions, data sources, and methodologies. It also presents a summary of recent key results and findings from the most recent edition of the Human Resource Module including: comparisons of tourism employment and employment in tourism industries, comparisons of trends in jobs in tourism industries and the total economy, job characteristics, hours worked, compensation, industry job shares, and industry job profiles.
- 8) Section 8 reviews the alignment of the Canadian concepts, methods and results with the current international standards for measuring tourism jobs and persons employed in tourism industries.
- 9) Section 9 presents several recent advances of Canada in moving beyond the TSA namely: the recent development and release of a new Quarterly Time Series of key aggregates of the HRM; and the development of tourism labour demand and supply forecasting models and associated short-, medium- and long-term forecasts and policy scenarios.
- 10) Section 10 describes conclusions emerging from the case study review of the Canadian experience in moving beyond the TSA and developing further measurements and information the employment aspects of tourism industries.
- 11) Section 11 offers recommendations on the development path and key decision options for others interested in expanding and improving the employment and labour facets of their national and regional systems of tourism statistics. It also offers a recommendation to the ILO and UNWTO regarding the need to develop a standard international tourism view and criteria for identifying characteristic tourism-related occupations.
- 12) Appendix I contains the definitions and sources of key terminology used in this case study.
- 13) Appendix II contains North American Industry Classification System (NAICS) descriptions of tourism industries.
- 14) Appendix III contains descriptions of tourism occupations from the Canada's National Occupational Classification system (NOC 2006).

## 15) Appendix IV contains selected tabular results from CTSA 2006 on Tourism GDP and Tourism Employment in tourism and non-tourism industries

This case study is based on previous studies and undertakings, carried out principally in Canada, but also in the ILO, OECD, and UNWTO. Relevant Canadian studies include the conceptualization, development, refinement, updating and extension of the Canadian Tourism Satellite Account (CTSA) which was first initiated by the pioneering conceptual and feasibility studies of the Canadian Task Force in Tourism Data in 1985 through 1987. The first Canadian concept proposal for a tourism satellite account (TSA) was presented at the World Tourism Organization's First International Conference on Tourism Statistics convened in Ottawa, Canada in 1991. The first Canadian prototype TSA was released by Statistics Canada in 1994. Subsequent updates and extensions have refined the landmark statistical instrument and improved its applicability and usefulness to inform and aid tourism policy decision-makers, improve the management of government tourism programs, as well as aiding strategic and operational tourism business decisions.

Particularly noteworthy extensions from the perspective of this study include: 1) the first Canadian demographic profile of tourism workers produced in 1994; 2) the first quarterly national tourism indicators of tourism employment released in June 1996; 3) the research and development of the Canadian Tourism Human Resource Module of the CTSA, between 1997 and 2005, and first released in March 2006<sup>7</sup>; 4) the research and development (2006-2008) of the tourism labour supply and demand models for the Canadian tourism sector first released in 2010; and lastly, 5) the first quarterly time series measures of key aggregates of employment in tourism industries – total industry employment (jobs), hours of work and compensation released in March 2013.

## **2. Importance of measuring employment, work and labour characteristics of tourism**

Relevant, timely, credible and comprehensive employment and labour market information for tourism industries is a primary requirement of tourism related human resource organizations such as the Canadian Tourism Human Resource Council (CTHRC). Other industry stakeholders share this general information requirement, but with less need for specific details, including organizations such as national tourism organizations (NTOs), national tourism administrations (NTAs), and various industry associations (e.g. restaurant and hotel associations). This paper uses the acronyms THROs and HROs as shorthand for all types of tourism human resource organizations representing interest groups of: industry, government, labour, educational and training stakeholders, employers' and employees' interest groups. Labour market information and related data facilitate their work

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<sup>7</sup> The research and development of the Human Resource Module of the Canadian Tourism Satellite Account followed the broad conceptual outlines of the *tourism labour force account* described in the OECD Tourism Employment Manual published in 2000.

fostering the development of a high quality and skilled work force and efficient labour markets for a vibrant, profitable and sustainable tourism sector.

Depending on their mandates, THROs such as the CTHRC realize these goals through tourism specific labour policies, human resource development policies and programme modes of action including: national tourism human resource development programmes, tourism occupational standards, education, training and certification programmes, industry communications, industry and stakeholder cooperation and coordination and, last but not least, tourism labour market information (TLMI) derived from related statistics developments, market and industry research and tourism industry and labour market intelligence.

Tourism labour markets are the institutions where tourism workers and tourism industries' employers interact for the sale and purchase of tourism labour services. They determine wages and benefits and allocate labour among competing uses. The most productive users of labour seek to attract the workers they need. Along with other factors, this determines the tourism economy's overall production. The more efficiently that tourism labour markets function, the more the tourism economy is able to produce and the more productive and competitive it can be. Tourism labour markets are not only important for economic goals of productivity and competitiveness, but also for national and regional social welfare goals such as employment and income distribution.

From CTHRC's perspective, tourism labour markets are central to the tourism economy and the socio-economic benefits derived from tourism. Research has shown that the tourism industries sector is highly labour intensive. It is also somewhat disadvantaged in the competition for labour. Furthermore, as will be shown later in this case study, previous research comparing the employee mixes of five major industry groups<sup>8</sup> identified within the tourism sector are found to be quite heterogeneous in their social characteristics. In addition, other national labour market research for the overall economy has shown that a country as large, geographically varied as well as economically, culturally, and socially diverse as Canada is characterized by multiple, varied, regionally-specific and industry-specific labour markets; rather than a single homogeneous national tourism labour market.<sup>9</sup>

Like all markets, tourism labour markets run on information. And to function well, they require accurate and timely information. Tourism labour market information (TLMI) is knowledge; facts, data, and relevant institutional information on tourism labour supply and demand. There are two main types of decisions that rely on TLMI: firstly, decisions by tourism labour market participants – tourism industries' employers and employees -- regarding individual transactions in the tourism labour market; and secondly, decisions by businesses, governments, and other institutions on

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<sup>8</sup> Sometimes six, with transportation split into two sub-groups, *air transportation* and *other transportation*.

<sup>9</sup> Adapted from the final report of the Canadian Advisory Panel on Labour Market Information, *Working Together to Build a Better Labour Market Information System for Canada*. Human Resources and Skill Development Canada, 2009.

tourism policies, practices and programmes addressing collective tourism needs and labour market issues.<sup>10</sup>

Tourism labour markets transform the individual decisions about tourism labour supply and demand into price signals that allocate labour and determine income. Furthermore, the better the information that all the participants have in making their decisions, the better the tourism labour markets function<sup>11</sup>.

For many years, tourism labour market information has exemplified a state of market and policy failure. It remains one of the least developed areas of tourism statistics, which, until recently, was itself largely underdeveloped, fragmented and incoherent. As a result, tourism-specific labour markets are generally described in the tourism and labour policy literature as comparatively inefficient.

In part, the Tourism Satellite Account (TSA) was conceived and developed, to correct this situation. That is to say that information on tourism employment and labour was one of the original identified tourism stakeholder informational requirements when the pioneering Canadian project to conceive of, design and develop the Canadian Tourism Satellite Account (CTSA) was first initiated by the Canadian Task Force on Tourism Data (1985-1987).<sup>12</sup> The initial vision of the TSA was of a new tool that could aid the Canadian NSO and NTO, as well as industry stakeholders, by providing a means of assessing the role and significance of tourism in the national economy, including the employment and labour aspects of tourism required by governments, THROs and other tourism labour and education stakeholders.<sup>13</sup>

The first prototype version of the CTSA met the initial stated requirements, first and foremost, by providing a precise but comprehensive definition of the scope of the principal economic activity, tourism demand, as well as the designation and definition a *tourism sector* consisting of an amalgamation of identified individual tourism industries directly related to servicing tourism visitor consumption (i.e., later named characteristic tourism activities (CTAs)<sup>14</sup>. Successive subsequent CTSA benchmark statistics and time series indicators of selected measures, such as tourism GDP and tourism employment, provide information that enables tracking the evolution of tourism. Such information speaks directly to the fundamental performance goal of both NTOs and THROs – improvement in the size and strength of the national tourism sector and its associated work force.

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<sup>10</sup> Ibid.

<sup>11</sup> Ibid.

<sup>12</sup> See *National Task Force on Tourism Data Final Report*. Statistics Canada, 1989.

<sup>13</sup> *Tourism Satellite Account: Working Paper No. 3*. National Task Force on Tourism Data. Statistics Canada, 1989.

<sup>14</sup> For example see *Tourism Satellite Account: Recommended Methodological Framework* (2000, and 2008).

Perhaps most importantly, however, the TSA provides the tourism sector with a view of itself as a productive activity as well as its role in the overall economy – a view that neither the sector, nor associated stakeholders, ever had before the development of this new analytical statistical instrument. First and foremost, the TSA identifies the services and products consumed by visitors, as well as the industries (CTAs) that serve visitors directly, and for which tourism is an important contributor to their overall economic output and production. It reveals, too, all of the other connected economic activities/industries outside the sector that are also directly influenced by tourism demand.

Less obvious, but of central importance to the purpose of this case study, the TSA also provides the pre-requisite technical conditions enabling statisticians and analysts to identify, estimate and describe jobs in tourism industries as well as other jobs in the economy directly related to tourism activity. Furthermore, the TSA provides the prerequisite keys enabling tourism statisticians and researchers to move beyond jobs and also reveal employers and, most importantly, tourism workers and their characteristics. As a result, various extensions and applications of the TSA have enabled Canada to move beyond the TSA in describing the characteristics of both the jobs in tourism industries and the characteristics of the persons employed in those jobs in even more detail, which is the primary concern of this study. Other related technical advances have taken Canada even further in developing econometric models for predicting the future volumes and characteristics of tourism work and workers under various assumed future economic and social conditions.

### **3. Employment information and the Canadian System of Tourism Statistics**

The Tourism Satellite Account has subsequently become the internationally recognized framework and standard by which to measure the economic significance of tourism activity<sup>15</sup>. In Canada, since its first release in 1994, the CTSA has provided credible official estimates of tourism's direct contribution to the Canadian economy and jobs in Canada. Being rooted in the Canadian System of National Economic Accounts (CSNEA), it has the added benefit of providing economic measures of the importance of tourism in terms of expenditures, gross domestic product (GDP) and employment which are comparable with similar measures for the overall economy. As such, it permits a comparison with other industries in terms of the same measures.

As previously noted, the CTSA also defines what are considered to be tourism commodities/products and tourism industries in Canada. One outcome of this has been the emergence of new, hitherto unrevealed, information on the evolution of tourism phenomena in Canada.

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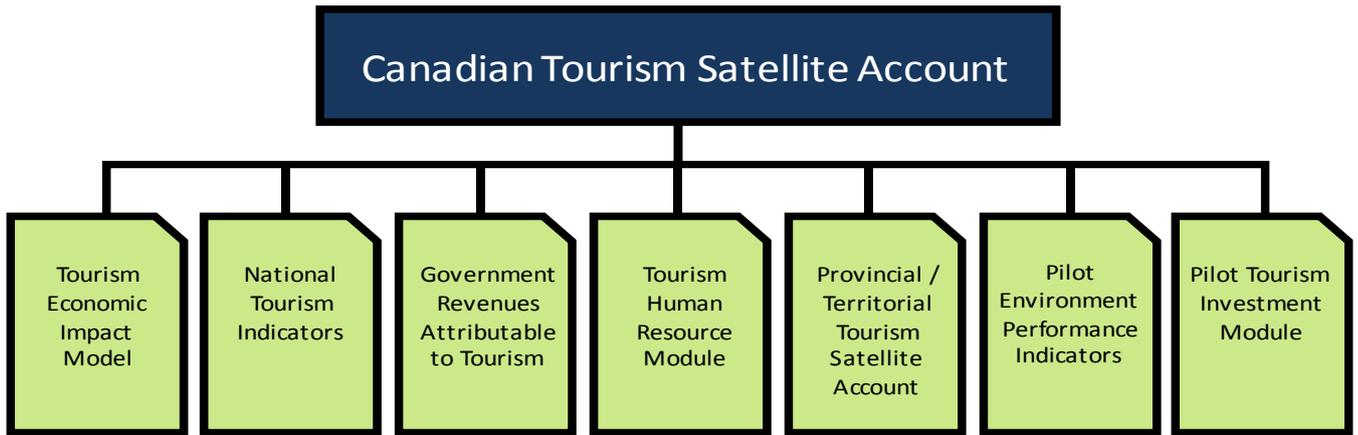
<sup>15</sup> See *International Recommendations on Tourism Statistics (2008)* and *Tourism Satellite Account: Recommended Methodological Framework (2008)*.

Furthermore, and perhaps most significantly for this study, the CTSA, provides a coherent framework within which to integrate, reconcile and organize a variety of related economic and social statistics as well as other information relevant to tourism, both on the supply side (i.e., industry) and on the demand side (i.e., tourism visitor). This is important because tourism is not an explicitly identified industry within the official statistical system, nor is it an identified comprehensive category of social statistics. Instead, rather than being a production concept, it is a demand concept that cross-cuts multiple industry categories. The CTSA amalgamates information on tourism's various industry components together and identifies, defines and describes a new analytical construct – the synthetic tourism sector – an amalgam of identified tourism industries within the Canadian statistical system.

In addition, as shown below in Figure 2, the CTSA also serves as the foundation stone, and initial building block, for a variety of other related statistical instruments revealing other aspects of the economic and social significance of tourism within national and regional geographies, including the:

- (i) Tourism Economic Impact Model (TEIM) which has been used to analyse various tourism outlook scenarios affecting tourism consumption and the national tourism economy, as well as the overall Canadian economy (Lapierre and Hayes, 1994);
- (ii) National Tourism Indicators (NTI), which provide timely quarterly macroeconomic information on the state of tourism in Canada (Statistics Canada, 1996; Beaulieu-Caron, 1997; Statistics Canada, 2013d);
- (iii) Government Revenues Module (GRAT), which provides studies on the revenue accruing to government that is directly related to tourism spending (Morissette, 2013);
- (iv) Human Resource Module (HRM) which provides detailed annual information on jobs in the tourism industries (Martin, 2013; Barber-Dueck, 2006);
- (v) Provincial-Territorial Tourism Satellite Account (PTTSA) which provides economic measures of the importance of tourism for all provinces and territories in comparison with each other and the national level of the Canadian economy in terms of expenditures, gross domestic product and employment (Barber-Dueck and Kotsovos, 2002);
- (vi) Pilot Environmental Performance Indicators which provide a feasibility study of proposed measures of the environmental impacts of tourism activities tied to the CTSA (Jackson, et. al., 2008); and the,
- (vii) Pilot Tourism Investment Module, another study undertaken to assess the feasibility of creating a Tourism Investment Module (TIM) to reveal the size and patterns of investment in the tourism sector (Sharan, 2012).

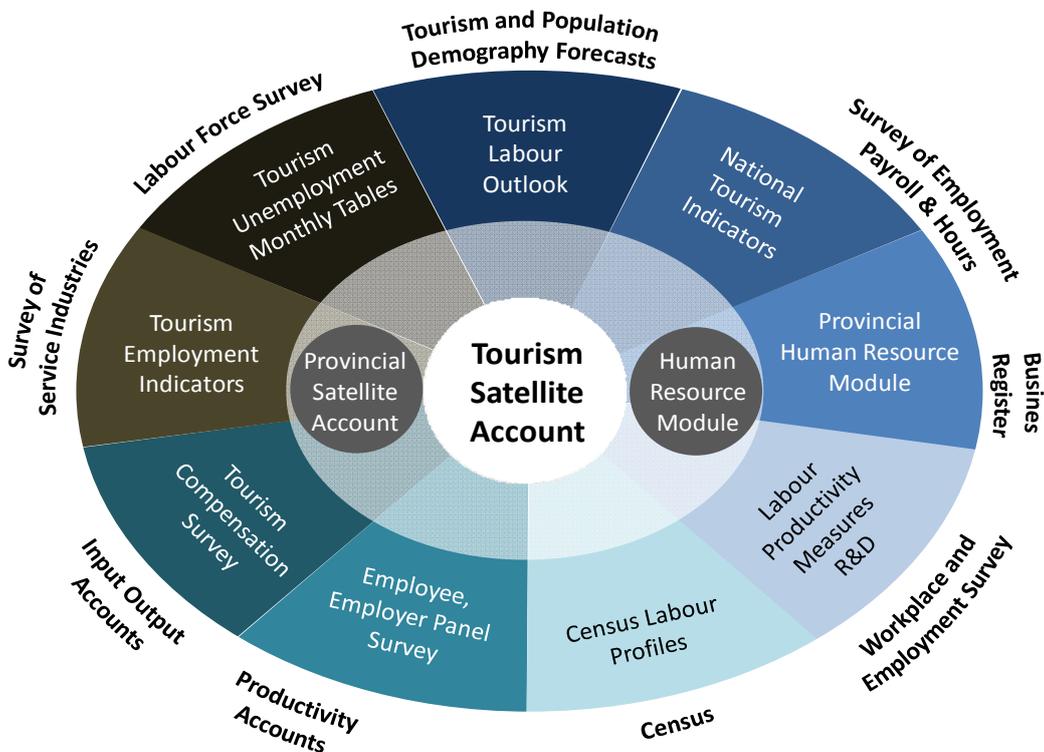
**Figure 2: Canadian System of Tourism Macroeconomic Statistics**



**Source:** Adapted from C. Morissette, *Provincial and Territorial Tourism Macroeconomic Statistics: A proposal for developing Provincial and Territorial Tourism Macroeconomic Statistics*, Statistics Canada, 2010

Lastly, the CTSA provides the initial central framework and point of leverage for the development of still further statistical applications and extensions that generate even more data and information about the employment and labour aspects of tourism in national and regional economies. These further measurement advances beyond the TSA are included within the complementary Canadian Tourism Labour Market Information System (TLMIS) shown in Figure 3.

**Figure 3: Canadian tourism labour market information system**



Specific core accounting components of the Canadian TLMIS, shown as the central blue and white circles seen in Figure 3 include: (i) the Tourism Satellite Account<sup>16</sup>, (ii) the Provincial-Territorial Tourism Satellite Accounts<sup>17</sup>, and (iii) the Tourism Human Resource Module<sup>18</sup>. Other derivative extensions and applications shown in the surrounding blue-grey-black band include: (i) the Census Labour Profiles of tourism industries and occupations<sup>19</sup>, (ii) the National Tourism Indicators<sup>20</sup>, (iii) Tourism Labour Supply-Demand Outlook Models<sup>21</sup>; (iv) the Tourism Compensation Survey<sup>22</sup>; (v) Tourism Unemployment estimated tables<sup>23</sup>; (vi) the Tourism Workplace Matters Employer/Employee Opinion Panel Survey<sup>24</sup>; and most recently, (vii) HRM Quarterly Total Tourism Industry Employment Indicators<sup>25</sup>. Other future analytical components of the TLMIS, still in the process of research and development, include: (i) Provincial-Territorial Human Resource Module; and (ii) tourism Labour Productivity Measures.

The surrounding outside area shown in Figure 3 also displays the original primary and secondary statistical data sources of the TLMIS drawn from both basic statistics and derived analytical statistical components of the overall Canadian national statistics system including:

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<sup>16</sup> See Appendix IV, and Kotsovos, D. (2007). *Canadian Tourism Satellite Account Handbook*. Income and Expenditure Accounts Technical Series, Catalogue 13-604, no. 52, December, Ottawa: Statistics Canada.

<sup>17</sup> See Barber-Dueck, C. and Kotsovos, D. (2002). *The Provincial and Territorial Tourism Satellite Accounts*. Income and Expenditure Accounts Division Technical Series #38, Statistics Canada. Ottawa.

<sup>18</sup> See Martin, T. (2013) *Human Resource Module of the Tourism Satellite Account, 2012, Catalogue No,13-604-M—No. 72*. Ottawa: Statistics Canada, 2013 .

<sup>19</sup> See CTHRC (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Canadian Tourism Human Resource Council.

<sup>20</sup> See Statistics Canada (2013d-1996). *National Tourism Indicators, Quarterly Estimates, various issues, System of National Accounts*, Catalogue no. 13-009-XPB, Ottawa: Statistics Canada.

<sup>21</sup> See Canadian Tourism Research Institute, Conference Board of Canada, (2012). *The Future of Canada's Tourism Sector: Shortages to Resurface as Labour Markets Tighten*. Ottawa: Canadian Tourism Human Resource Council.

<sup>22</sup> R. A. Malatest and Associates, (2013). *2012 Canadian Tourism Sector Compensation Study*. Ottawa: Canadian Tourism Human Resource Council.

<sup>23</sup> Canadian Tourism Human Resource Council, (2013). *Canadian Labour Force Survey, 2012 Tourism Sector Highlights*. Custom tabulation.

[http://cthrc.ca/en/research\\_publications/labour\\_market\\_information/~media/Files/CTHRC/Home/research\\_publications/labour\\_market\\_information/Labour\\_Force\\_Survey/Labour\\_Force\\_Survey\\_Annual\\_Highlights\\_Current.ash](http://cthrc.ca/en/research_publications/labour_market_information/~media/Files/CTHRC/Home/research_publications/labour_market_information/Labour_Force_Survey/Labour_Force_Survey_Annual_Highlights_Current.ash)

<sup>24</sup> See CTHRC website [http://cthrc.ca/en/research\\_publications/labour\\_market\\_information](http://cthrc.ca/en/research_publications/labour_market_information).

<sup>25</sup> Statistics Canada (2013a). *Quarterly Estimates of the tourism satellite account Human Resource Module*, First quarter of 1997 to Fourth quarter of 2012, Statistics Canada, March, Ottawa: Statistics Canada.

- Canadian Census of Population
- Workplace and Employment Survey
- Canadian Business Register
- Survey of Employment Payroll and Hours
- Forecasts of tourism demand and population demographics
- Labour Force Survey
- Survey of Service Industries
- Canadian System of National Economic Accounts: National and Provincial-Territorial Input-Output Accounts
- Canadian System of National Economic Accounts: Productivity Accounts.

## 4. TSA contributions to information on the employment dimension of tourism

As noted previously, closing the gaps in information on employment aspects of tourism, particularly the volumes, value and characteristics of work (e.g., jobs and occupations), and workers in tourism industries, was seen as one of the key requirements and important uses of the proposed new statistical instrument from the very beginning of the feasibility study of the Tourism Satellite Account by Statistics Canada for the Canadian National Task Force on Tourism Data<sup>26</sup>. The original anticipated human resource management uses for the information products emerging from the proposed new satellite account included aiding decisions regarding manpower development, education and training, planning and awareness and also marketing; investment; operations and strategic management.<sup>27</sup>

When the first Tourism Satellite Account (TSA) was released in Canada in 1994 (for reference year 1988), it revealed for the first time, that tourism was a significant creator of employment in the Canadian economy<sup>28</sup>. It also showed conclusively that tourism is a very labour-intensive sector in Canada, generating a disproportionately large share of total employment in the business sector of the Canadian economy when compared with its share of value added<sup>29</sup>.

Three other key benefits emerged from this initial groundbreaking work. First, release of the initial Canadian TSA prototype and the later development and promulgation by the World Tourism Organization (UNWTO) of the *Tourism Satellite Account: Recommended Methodological Framework 2001* (TSA: RMF 2001), identified for the first time a feasible methodological approach for compiling information from official national industry and social statistical sources and measuring non-traditional demand-based cross-cutting sectors of economic activity such as tourism<sup>30</sup>. Second, the endorsement and adoption of a common concept and definition of the tourism sector as an analytical amalgamation and synthesis of characteristic industries (economic activities) that included passenger transportation, accommodation, food and beverage services, travel services and recreation and entertainment characteristic industry/activity groups provided tourism officials and stakeholders, with a view of themselves and their role in the overall economy for the first time. Third, the “official” recognition by Statistics Canada, and later by the United Nations Statistics Commission, of a synthetic tourism sector as a legitimate entity that could be measured and

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<sup>26</sup> See *Tourism Satellite Account: Working Paper No. 3*. National Task Force on Tourism Data, Statistics Canada, 1989.

<sup>27</sup> See *National Task Force on Tourism Data Final Report*. Statistics Canada, 1989.

<sup>28</sup> See Lapierre, J. and Hayes, D. (1994) *The Tourism Satellite Account*. Statistics Canada.

<sup>29</sup> Ibid.

<sup>30</sup> Tourism was the first “satellite account” formally developed and recognized by the United National Statistics Commission after SNA 93 signalled the potential of developing such synthetic analytical constructs as a means of revealing information on non-traditional cross-cutting economic activities such as tourism and communications.

described in its many facets and aspects, including those of employment and labour, opened up a multitude of future analytical possibilities and tourism policy and development applications, including those relating to tourism workforce development and human resource management.

The current version of the CTSA follows the subsequent international guidelines for tourism satellite accounts adopted by the United Nations Statistical Commission<sup>31</sup> and is rooted in the Canadian System of National Accounts (CSNA). As such, it uses the same basic concepts and defines and measures tourism activity and tourism industries, tourism commodities, tourism expenditures, gross domestic product and employment in ways that are comparable with similar measures from the CSNA as well as the international System of Tourism Statistics<sup>32</sup>. As a result, the CTSA provides general measures of the economic importance of tourism in terms of these economic variables that are directly comparable with similar measures from the CSNA for the overall economy as well as other countries that follow the same international standards.<sup>33</sup> It also permits comparisons with other industries in terms of output, employment and other relevant variables.

Thus, for example, the CTSA follows the current international guidelines in defining *tourism* as “the activities of visitors” (IRTS, 2008, para. 2.9: 10); while *visitors* are defined as “a *traveller* taking a trip to a main destination outside his/her *usual environment*, for less than a year, for any main purpose (business, leisure, or other personal purpose) other than to be employed by a resident entity in the country visited” (IRTS, 2008, para. 2.9:10). Trips taken by visitors qualify as *tourism trips* (IRTS, 2008, para. 2.9:10). Non-tourism trips by *other travellers* include travel of border workers, seasonal workers, other short and long term workers, crews on public modes of transport, commuters (i.e. frequent border crossers) long-term students, military personnel and dependents, diplomats, and consular staff, immigrants and refugees (IRTS, 2008, para. 2.29-2.49: 13-17). International travel for reasons other than the exclusions just noted and involving the crossing of an international boundary is considered a departure from the usual environment regardless of distance traveled, and thus an *international tourism trip and visit* (IRTS, 2008, para. 2.29-2.49: 13-17). Domestic travellers are considered *domestic visitors* if they are on a tourism trip and they are residents travelling in the country of residence (IRTS, 2008, para. 2.49-2.53: 16-17). Up until 2005 in Canada, the operational measurement criterion of a departure from the usual environment, distinguishing domestic travel from domestic tourism trips was defined as less than 80 kilometres (one-way) from home. However in 2005-2006, with the redesign of the Canadian domestic travel survey and the changeover from the former Canadian Travel Survey to the new Travel Survey of Residents of Canada (TSRC), the operational definition of a departure usual environment, distinguishing tourism trips from other domestic travel, changed to include all overnight “out of town” trips and “same-

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<sup>31</sup> See *Tourism Satellite Account – Recommended Methodological Framework 2008 (TSA:RMF)*.

<sup>32</sup> Kotsovos, D. Canadian Tourism Satellite Account Handbook. Statistics Canada, Ottawa, December 2007. Catalogue no. 13-604-MIE no. 52. Page 5.

<sup>33</sup> See for example, (Statistics Canada, 2011) for methodological notes on recent revisions to the CTSA to improve the alignment with TSA:RMF 2008.

day trips exceeding forty kilometres one way from home”. Furthermore, in addition to the other usual exclusions, routine trips, such as for grocery shopping, are excluded even if “out of town” or over forty kilometres. The CTSA 2006 source data and estimates included in this case study are benchmarked on data from the new 2005 TSRC.

Similarly, within the CTSA, as within the international standards, a tourism industry is defined as “a grouping of those business establishments whose main activity is the same *tourism characteristics activity*” (TSA: RMF 2008, para. 3.11, p. 25). In supply-side statistics establishments are classified according to their main activity which is determined by the activity that generates the most value added. Similarly, a *tourism characteristic activity* is defined as those that typically produce *tourism characteristic products* (IRTS 2008, para. 5.16; TSA: RMF 2008, para. 3.8, p. 25). Furthermore *tourism characteristic products* are in turn defined as (1) *internationally comparable tourism characteristic products*, which represent the core products for international comparisons of tourism expenditure; and (2) *Country-specific tourism characteristic products* (to be determined by each country by applying the criteria mentioned in IRTS 2008, para. 5.10, in their own context). For both of these mentioned product categories, the activities producing them are considered as *tourism characteristic*, and the industries in which the principal activity is tourism characteristic are called *tourism industries* (Kotsovos, 2007:75).

The CTSA applies these general concepts and definitions in the Canadian context by operationally defining a *tourism industry* as an industry “that serves visitors directly and would cease to exist or continue to exist only at a significantly reduced level of activity, as a direct result of the absence of tourism,”<sup>34</sup> Some industries would cease to exist without tourism, such as travel agencies. Other industries would experience substantially reduced levels of activity without tourism, such as the air transportation, accommodation and food and beverages industry groups. In other cases, industries, such as the catering industry would not be directly affected by the absence or reduction of tourism activity but would nevertheless be greatly affected indirectly through the effects of the loss or reduction of tourism on its clients in the air transportation industry. The Canadian TSA identifies 29 such ‘*characteristic tourism industries/activities*’ at the 4-digit level within the North American Industry Classification System (NAICS) and aggregates them into five major component industry groups as noted earlier (see Appendix II and Table 1)<sup>35</sup>. Collectively all five major component groups and all 29 specific industry categories comprise the *Canadian tourism sector* (Kotsovos, 2007:75).

As noted above, one the main objectives of the development of the CTSA is to provide aggregate measures of the *economic importance of tourism* in terms of these economic variables that are

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<sup>34</sup>See Appendix I and the original source definition in the *Canadian Tourism Satellite Account Handbook*, (Kotsovos, 2007:75).

<sup>35</sup>See also the *Canadian Tourism Satellite Account Handbook*, Kotsovos (2007:75).

directly comparable with similar measures from the CSNA for other industries and the overall economy – particularly gross domestic product and employment.

*Gross domestic product* (GDP) is defined in the SNA as the unduplicated value of production of goods and services within the geographic boundaries of a country or region (e.g., province, territory), (Kotsovos, 2007:70).<sup>36</sup> *Tourism GDP* is the GDP that can be attributed to the production of goods and services consumed directly by visitors.<sup>37</sup> In the CTSA, tourism GDP is calculated as the sum of the labour income, mixed-income (net income of unincorporated business) and other operating surplus (corporate profit and depreciation) that can be directly attributed to visitor spending (Martin, 2013:22).<sup>38</sup>

In terms of employment, as mentioned earlier, it should be noted that the CTSA adopts and applies the concept of *tourism employment*, in accordance with the established international standards, in reference to “employment strictly related to the goods and services acquired by visitors and produced by either tourism industries or other industries” (IRTS 2008, para.7.3). Thus, within the CTSA framework, *tourism employment* is a measure of the number of jobs in tourism and non-tourism industries, held by the self-employed, employees and unpaid family workers. It includes only jobs directly attributable to tourism.

Furthermore, it should be noted that instead of direct observation this concept is measured by indirect techniques to estimate employment attributable to tourism (Kotsovos, 2007:7)<sup>39</sup>

Within the CTSA, tourism employment is calculated by industry after compiling demand and supply for tourism commodities. First, tourism spending is assigned to each industry using an assumption that tourism spending on a given commodity is proportional to its supply across all industries, since

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<sup>36</sup>Unduplicated means that values are not double counted. If, for example, the value of fuel used by aircraft is counted along with airfares (which already include the costs of fuel inputs) the value of the fuel would be counted twice. Instead, only the value added (the difference between revenues from sales of goods and services produced and the cost of intermediate inputs of goods and services) at each stage of production is counted in GDP. It should be noted that GDP in the CSNA and CTSA is measured at basic prices. This means essentially that valuation is at the prices received by sellers, and does not include taxes on the sale of goods and services (Martin, 2013:22).

<sup>37</sup>The qualifier “directly” is important. To continue the example from above, “directly” means that only the GDP generated in the production of passenger air transportation (which visitors consume in their travels) can be counted in tourism GDP, not any of the GDP or value added generated in the production of goods and services that are inputs to air transport (like the fuel which airlines use). It is in this sense that tourism GDP is directly attributable to visitor spending. There is, of course, GDP generated in the upstream production chain that can be attributed to tourism, but only indirectly. Estimates of indirect effects of tourism can be obtained from economic impact models such as the Canadian Tourism Economic Impact Model (see Lapierre and Hayes, 1994), (Martin, 2013:22).

<sup>38</sup>In the CTSA, GDP is calculated using the sum of incomes generated by production approach, one of the three approaches to measuring GDP. The other two approaches are based on summing (1) the final expenditures on goods and services produced, and (2) the value added generated in the production of goods and services (Martin, 2013:22).

<sup>39</sup>(See also Appendix I, Tourism employment).

this information is not directly available from tourism demand surveys or any other source. Then, employment attributable to tourism demand within each industry is calculated using the same ratios (tourism commodity ratio, tourism industry ratio, and tourism GDP ratio) used to calculate GDP attributable to tourism. However, since employment data are only available at an industry level too aggregate for the CTSA, wages and salaries data, for which more detailed data are available, are used to allocate employment the sub-industries before doing the calculations to estimate employment attributable to tourism demand at the sub-industry level (Kotsovos, 2007:41)<sup>40</sup>.

As mentioned earlier, it should also be noted that the human resource dimension of the CTSA is limited as it focuses mainly on monetary aggregates associated with tourism supply and demand and the measurement of GDP. As a result, only the number of jobs and labour income directly attributable to tourism can be found in the CTSA. (Kotsovos, 2007:41).

#### **4.1 CTSA results regarding tourism employment and GDP**

As shown in Appendix IV, Table AIV-1, selected figures from the most recent benchmark of the CTSA, reveal the economic importance of tourism in tourism and non-tourism industries<sup>41</sup> for reference year 2006<sup>42</sup> in terms of relevant aspects of tourism employment and GDP including: labour income, net income of unincorporated business, other income<sup>43</sup>, number of jobs, labour compensation per job, GDP at basic prices, GDP per job and tourism's share of total industry GDP<sup>44</sup>. Key findings from the relevant CTSA 2006 results shown in Appendix IV, Table AIV-1 include the following:

- **Tourism's contribution to jobs:** Tourism contributed 3.9% of all jobs in Canada in 2006 accounting for 606,500 jobs in total, 80% of which are provided to tourism industries and account for 483,000 jobs in these industries.
- **Tourism's contribution to labour income:** Associated with those jobs directly related to tourism activity, tourism contributed \$16,626.9 million in labour income in 2006, equal to 2.2% of all returns to labour in the Canadian economy in 2006.
- **Contributions to jobs and labour income in specific industries:** Tourism provided the most jobs and labour income to the accommodation industry (161,000 and \$4,034.1 million) with the food and beverage services industry a close second (145,300 and \$2,721.1 million).

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<sup>40</sup>See *Canadian Tourism Satellite. Account Handbook*, Kotsovos, D., 2007, Sections 5.5.2-5.5.3 for a detailed explanation of the specific methodological steps and procedures used to calculate tourism employment and tourism GDP.

<sup>41</sup>Including government and non-profit institutions.

<sup>42</sup>Source: Unpublished CTSA 2006 summary tables released in 2012.

<sup>43</sup>Includes other operating surplus, other taxes on production (excluding taxes on products) and other subsidies on production.

<sup>44</sup>Percentage of an industry's GDP that comes from tourism demand.

About 20% of tourism jobs were in non-tourism industries. Tourism accounted for 123,500 jobs and \$4,127.8 million in labour income in these industries, mostly in retail, manufacturing and wholesale trade.

- Labour compensation per job: Tourism generated \$26,900 in labour compensation per job in tourism industries in 2006 and \$35,200 in labour compensation per job in other “non-tourism” industries. Tourism provided the highest average labour compensation level in the transportation industry group at \$44,800 per job, followed by travel services at \$26,900; while jobs in food and beverage services paid the least at \$18,600 per job in 2006. Notably, the average compensation level in tourism industries is about a half of the average labour compensation level of \$53,300 for the overall economy in 2006.
- Tourism gross domestic product (GDP): Tourism GDP<sup>45</sup> at basic prices for all tourism industries reached \$19.2 billion in 2006. On the other hand, tourism GDP of all tourism activities in the economy including other industries reached \$25.6 billion in 2006, equalling 1.9% of the economy-wide GDP in that reference year.
- Tourism’s contribution to tourism industries: Travel services are the most reliant on tourism in so far as 88.8% of the industry’s economic activity comes from tourism. Other industries most affected are air transportation and accommodation. For air transportation, tourism accounted for 71.8% of the industry’s GDP in 2006. It accounted for 62.3% of the economic activity of the accommodation industry. The food and beverage services industry with a 17.2% share of tourism GDP is the least reliant on tourism among the major tourism industry groups. While these shares may appear low, the air transportation industry includes freight services while the accommodation industry and the food and beverage services industry include meals and alcohol served to local residents (non-tourists) which reduce the share due to tourism.
- Tourism’s contribution to non-tourism industries: Various industries not identified as “tourism industries” produce goods and services that are purchased by visitors (i.e., groceries, souvenirs and other retail goods). In 2006 these *other industries* accounted for 24.3% of tourism GDP. Tourism generated 123,400 jobs and \$4,127.8 million in labour income in these industries.
- Tourism labour productivity: Tourism GDP per job in all tourism industries reached \$39,700 in 2006, a little less than one half the average GDP per job level of the overall economy of \$87,000.

As relevant and useful as is all this information on the employment aspects of tourism, it remained for other later approaches to address the early initial expectations and persistent industry stakeholder requirements for other tourism-specific human resource information, such as the

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<sup>45</sup>All references to GDP are at basic prices (See Appendix 1). All growth rates of dollar denominated series are in nominal terms.

volumes and characteristics of employees in tourism industries. Notwithstanding these limitations, as previously noted, a key breakthrough of the Canadian TSA prototype--the definitions and criteria for identifying tourism industries--was of particular relevance to the later development of more extensive information on employment and labour in tourism industries to address the initial data gap and criticism raised by industry stakeholders interested in the human resource aspects of tourism industries.

## **4.2 Addressing the data gap on persons employed in tourism industries**

As just mentioned, from a tourism human resource management and workforce development perspective, industry analysts and decision makers require still more data and information about tourism-specific human resources of relevance to decisions and programmes regarding manpower development, education and training, attraction and retention policies, programs and practices.

Accordingly, this next section of this case study focuses primarily on *the social and work characteristics of persons employed in their main jobs<sup>46</sup> in tourism industries in Canada* regardless of whether their job or employment can be directly attributed to visitor consumption. It is important to remember that this involves the shift in conceptual perspective discussed earlier moving from tourism employment to employment in tourism industries. It is also important to note that these estimates of persons employed in tourism industries are derived from two other different primary data sources—the Canadian Census of Population and the Labour Force Survey—using different data compilation and estimation approaches.

This alternative view of the employment dimension of tourism, focussing on the characteristics of persons employed in tourism industries, has been a major focus of the statistical measurement capacity development programme of work of the Canadian Tourism Human Resource Council, in partnership with Statistics Canada and the Canadian Tourism Commission, over the course of the past twenty-five years since the first emergence of the Canadian Tourism Satellite Account.

Despite the lack of information it carries on the social characteristics of tourism workers; adopting the TSA as a conceptual framework for tourism proved to be a key prerequisite step to unlocking other existing social data sources such as the Census of Population and the Labour Force Survey.

## **5. Beyond the TSA: Canada's initial response to the gap in information on persons employed in tourism**

### **5.1 Approach**

Even before the release of the first Canadian TSA in 1994, industry and statistical stakeholders—principally the Canadian Tourism Human Resource Council (the national HRO), Statistics Canada

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<sup>46</sup> Note that persons employed in tourism industries in their second or third jobs, but not in their main job are not included in the data on which this case study is based.

(the national NSO) and the Canadian Tourism Commission (the NTO, then called Tourism Canada)—began working together on supplementary approaches to address the apparent information gap. As a first approach to compensating for the absence of social data on tourism workers in the information resources provided by the CTSA, researchers and stakeholders began experimenting with using the concepts, definitions and classifications of tourism industries derived from the CTSA development process and combining them with additional specifications for tourism related occupations as templates for compiling customized tables of data from the Canadian Census to produce profiles of detailed employee characteristics for each of the five major industry groups delineated in the Canadian tourism sector as defined and described in the first CTSA feasibility study (Mohan, 1994).

This new line of evidence produced detailed demographic profiles of the people working in tourism industries by geography and industry group for 31 occupations found in significant numbers in tourism industries as well as 7 other occupations found in other industries but of key strategic interest to tourism industry organizations. The social attributes covered included gender, age, work patterns, language, birthplace, equity group representation (aborigines, visible minorities, disabled), education, and school attendance. The same tabulations were also produced for all ten provinces and one combined subset covering the three northern regions of Canada. The resulting data on the social aspects of tourism workers are presented and interpreted in a series of separate reports produced once every five years entitled *Demographic Profile of Tourism Sector Employment* describing the tabulation results from the most recent available Canadian Census data files (CTHRC, 2012).

This customized application of the CTSA as a conceptual framework for more detailed tourism labour market analysis is one of the primary focal points of this Canadian case study. Although these results are less timely than other subsequently developed complementary information sources, no other data source can provide such detailed information to accurately reveal what percentage of persons are working in tourism industries with a particular labour characteristic, such as disabled persons working in tourism by industry group, of a particular region or major local labour market. Furthermore, while the absolute numbers may change from one census year to the next; most of the percentage shares do not generally shift significantly between census years.

From a tourism human resource development perspective detailed information of this kind is an essential data requirement. Thus for the purpose of informing tourism policy, planning and programming initiatives involving training, recruitment, labour supply/demand imbalances, etc., tourism human resource organizations such as CTHRC need to understand the total number of people employed in the sector and their relevant social and labour characteristics. From this perspective, even though business units in individual tourism industries may actually be providing services to other local consumers as well as visitors, the levels of service provided and the skills or occupational requirements involved are the same. For example, whether or not a bartender serves tourists or local patrons, the profile of the occupation and the human resource needs of that position will be the same.

This section of the Canadian case study presents the results obtained from secondary analysis of customized tabulations of the 2006 Census and recent data files of the ongoing annual Labour Force

Survey (LFS) to report on the numbers of people and their geographic distributions of industry groups within the identified industries of the Canadian tourism sector. Census variables are also used in occupational profiles to describe the demographic characteristics of people employed in the sector and its component industries.

## 5.2 Concepts and definitions

As mentioned previously, the concepts and definitions of tourism and the employment dimension of tourism in this section of the case study of the Canadian experience in measuring the employment aspects of tourism within both the Canadian System of Tourism Statistics and the Tourism Labour Market Information System are generally consistent with established international standards regarding concepts, definitions and measurement approaches for tourism phenomena<sup>47</sup>.

### 5.2.1 Employment in tourism industries

At the core of the Census Demographic and Labour Profiles application described in this section, is the concept of *employment in tourism industries* adopted here as differentiated from *tourism employment* as described in the previous section presenting results from the CTSA. To reiterate briefly, the concept of *employment in tourism industries*, refers to all jobs and persons engaged both characteristic tourism activities and non-tourism-characteristic activities in all establishments in tourism industries. In the Canadian application of this concept within the CTSA, industries producing tourism commodities (i.e. characteristic tourism products) are considered tourism industries, or part of the tourism sector, if individually they would cease to exist or would exist only at significantly reduced levels of activity in the absence of tourism.

The Canadian Tourism Satellite Account (CTSA) uses the North American Industry Classification System (NAICS) as the basis for identifying and describing individual industries. NAICS classifies businesses by the primary industry in which they are found. For example, a hotel that has a restaurant on-site would be classified in the traveler accommodation industry because providing traveler accommodation is the primary activity of the hotel.

As shown below in Table 1 , at the four-digit level of NAICS, the CTSA identifies the twenty-nine industries within the tourism sector that have been categorized into five industry groups: accommodation; food and beverage services; recreation and entertainment; transportation; and, travel services. Listed below are the industries included in the tourism sector in Canada by industry group. They are fully described in Appendix II.

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<sup>47</sup>Kotsovos, Demi. *Canadian Tourism Satellite. Account Handbook*. Statistics Canada, Ottawa, December 2007. Catalogue no. 13-604-MIE no. 52. Page 51.

**Table 1: North American Industry Classification System (NAICS) industries identified as Canadian tourism industries**

<b>Accommodation</b>	<b>Transportation</b>
NAICS 7211-Traveller Accommodation	NAICS 4811-Scheduled Air Transportation
NAICS 7212-RV (Recreational Vehicle) Parks & Recreational Camps	NAICS 4812-Non-Scheduled Air Transportation
	NAICS 4821-Rail Transportation
<b>Food &amp; Beverage Services</b>	NAICS 4831-Deep Sea, Coastal & Great Lakes Water Transport
NAICS 7221-Full-Service Restaurants	NAICS 4832-Inland Water Transportation
NAICS 7222-Limited-Service Eating Places	NAICS 4851-Urban Transit Systems
NAICS 7224-Drinking Places (Alcoholic Beverages)	NAICS 4852-Interurban & Rural Bus Transportation
	NAICS 4853-Taxi & Limousine Service
<b>Recreation and Entertainment</b>	NAICS 4854-School & Employee Bus Transportation
NAICS 5121-Motion Picture & Video Industries	NAICS 4855-Charter Bus Industry
NAICS 7111-Performing Arts Companies	NAICS 4859-Other Transit & Ground Passenger Transportation
NAICS 7112-Spectator Sports	NAICS 4871-Scenic & Sightseeing Transportation, Land
NAICS 7115-Independent Artists, Writers & Performers	NAICS 4872-Scenic & Sightseeing Transportation, Water
NAICS 7121-Heritage Institutions	NAICS 4879-Scenic & Sightseeing Transportation, Other
NAICS 7131-Amusement Parks & Arcades	NAICS 5321-Automotive Equip. Rental & Leasing
NAICS 7132-Gambling Industries	
NAICS 7139-Other Amusement & Recreation Industries	<b>Travel Services</b>
	NAICS 5615-Travel Arrangement & Reservation Services

Source: Kotsovos, D., *Canadian Tourism Satellite. Account Handbook*. Ottawa: Statistics Canada, December 2007. Catalogue no. 13-604-MIE no. 52.

### 5.2.2 Tourism occupations

While there are over four hundred occupations found for workers in the Canadian tourism sector, this case study report includes data for thirty-six (see Table 2 below). These provide the majority of employment in the sector and were selected by tourism human resource management stakeholders because people in the occupation work primarily in tourism industries (i.e. food and beverage servers) or the occupation is of sufficient size (more than 2,000 people)<sup>48</sup> to be important to the sector (e.g. conference and event planners). A few occupational titles related to general business operations are also included in this case study data application to help demonstrate the opportunities in the sector in categories not typically thought of as characteristic tourism occupations (e.g. sales, marketing and advertising managers). The seven supplementary occupation groups of interest include workers that report employment in any one or more of the tourism industry groups, and have a work force large enough to warrant the interest and attention of CTHRC include: (1) janitors, caretakers, and building superintendents; (2) retail trade managers (3) accounting and related clerks; (4) sales, marketing and advertising managers; (5) customer service, information and related clerks; (6) retail trade supervisors; and (7) human resource managers.

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<sup>48</sup> At the NOC-S 2006 4-digit level

Statistics Canada's National Occupational Classification System for Statistics purposes (NOC-S 2006) is used to describe the occupations included in this case study report (see Table 2) because it is the system utilized by the Canadian Census. This system is similar to the more general National Occupational Classification (NOC) system used by Human Resources and Skills Development Canada (HRSDC), and both classifications share the same broad occupational groups at the highest level of aggregation.<sup>49</sup> The NOC and the NOC-S also share a common hierarchical framework. Other than the detailed classification numbering and the aggregation structure of the classification, the two systems are very alike and both provide listings of all the categories under which Canadian jobs are classified.

The occupational categories included in this case study report as well as the associated NOC and NOC-S codes are listed in Table 2 below. The detailed NOC-S descriptions of each of the occupations included in this case study report are also provided in Appendix III. It should be noted that titles may differ from what is commonly used in the tourism sector and related occupational standards and certification programs.

For those familiar with the Canadian TLMIS system and the Tourism Satellite Account: Human Resource Module<sup>50</sup>, it should be noted also that this list of 36 tourism related occupations is based on the occupational categories for which CTHRC, the national HRO, has developed national occupational standards and training materials in response to industry requirements. As a result, it does not align fully with the detailed list of tourism occupations cited in the TSA: HRM based on purely technical criteria<sup>51</sup>.

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<sup>49</sup>In 2012 Statistics Canada and Human Resources and Skills Development Canada (HRSDC) jointly released a new National Occupational Classification (NOC) 2011. This classification replaces Statistics Canada's National Occupational Classification - Statistics (NOC-S) 2006 used in this study as well as HRSDC's National Occupational Classification (NOC) 2006, eliminating the differences that have previously existed between these classifications.

<sup>50</sup>See Statistics Canada 2012. Human Resource Module of the Tourism Satellite Account, 2011. Statistics Canada – Catalogue no. 13-604-M no. 70.

<sup>51</sup>Occupations included in the list shown in Table 2 but not in the TSA: HRM include: conference and event planners; customer service, information and related clerks; human resource managers; other attendants in accommodation and travel; sales, marketing and advertising managers; ticket agents cargo service representatives and related clerks (except airline); and transportation managers.

**Table 2: Tourism related occupational titles and NOC and NOC-S (2006) classification codes**

<b>TITLE (listed alphabetically)</b>	<b>NOC</b>	<b>NOC-S 2006</b>
Accommodation Service Managers	632	A222
Accounting and Related Clerks	1431	B531
Air Pilots, Flight Engineers and Flying Instructors	2271	C171
Airline Sales and Service Agents	6433	G713
Bakers	6252	G942
Bartenders	6452	G512
Bus Drivers and Subway and Other Transit Operators	7412	H712
Cashiers	6611	G311
Casino Occupations	6443	G723
Chefs	6241	G411
Conference and Event Planners	1226	B316
Cooks	6242	G412
Customer service, information and related clerks	1453	B553
Food and Beverage Servers	6453	G513
Food Counter Attendants, Kitchen Helpers and Related Occupations	6641	G961
Food Service Supervisors	6212	G012
Hotel Front Desk Clerks	6435	G715
Human Resource Managers	112	A112
Janitors, Caretakers and Building Superintendents	6663	G933
Landscaping and Grounds Maintenance Labourers	8612	I212
Light Duty Cleaners	6661	G931
Maîtres d'hotel and Hosts/Hostesses	6451	G511
Operators and Attendants in Amusement, Recreation and Sport	6671	G731
Other Attendants in Accommodation and Travel	6672	G732
Outdoor Sport and Recreation Guides	6442	G722
Program Leaders and Instructors in Recreation and Sport	5254	F154

<b>TITLE (listed alphabetically)</b>	<b>NOC</b>	<b>NOC-S 2006</b>
Pursers and Flight Attendants	6432	G712
Restaurant and Food Service Managers	631	A221
Retail Salespersons and Sales Clerks	6421	G211
Sales, Marketing and Advertising Managers	611	A131
Taxi and Limousine Drivers and Chauffeurs	7413	H713
Technical Occupations Related in Museums and Art Galleries	5212	F112
Ticket Agents, Cargo Service Representatives and Related Clerks (Except Airline)	6434	G714
Tour and Travel Guides	6441	G721
Transportation Managers	713	A373
Travel Counsellors	6431	G711

Source: Canadian Tourism Human Resource Council, *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa, 2012.

## 5.3 Sources and methods

### 5.3.1 Canadian Census of Population

Every five years, the entire population of Canada is enumerated by means of a census which has been mandatory for all households and collects information about Canadian citizens (by birth and by naturalization), landed immigrants, and non-permanent residents<sup>52</sup>. The census also counts Canadian citizens and landed immigrants temporarily outside the country on Census Day. Respondents were asked to provide information for all members of the household, as it pertained to Census Day, May 16.

The Census provides detailed information covering broad range of labour market variables including such as place of residence, gender, age, education, industry of main job, occupation, work patterns (full year / part year, full time / part time) mother tongue, place of birth, school attendance, education level, and equity group membership (visible minorities, aboriginal peoples, disabled persons). It provides the most detailed source of labour market information available, albeit not the most timely. No other data source can provide such detailed information to accurately reveal what percentage of persons are working in tourism industries with a particular labour characteristic, such as disabled persons working in tourism by industry group, of a particular region

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<sup>52</sup>As of 2011, the "long-form version of census information was transformed into a voluntary sample survey, entitled the National Household Survey.

or major local labour market. Furthermore, while the absolute numbers may change from one census year to the next; most of the percentage shares do not generally shift significantly between census years.

Most variables from a particular census year can be compared to previous census data. However, due to changes made to the language used in some questions and/or the associated reporting process, some variables cannot be historically compared. Examples reported in this case study, based on 2006 Census data, include “school attendance”, “level of education”, and “equity groups”.

### 5.3.2 Labour Force Survey

The Labour Force Survey (LFS) is a monthly national sample survey conducted by Statistics Canada and includes approximately 53,400 households, which translates roughly to a sample size of 100,000 people over the age of fifteen. The LFS collects basic labour force activity information including the industry and occupation of employment for the survey reference week (normally the week including the 15th of the month), both for employees and the self-employed. The national sample data file does not cover the territories<sup>53</sup>, military personnel or civil servants stationed abroad, or persons residing on Indian reserves. Industry data collected and classified based on the North American Industry Classification System 2007, while occupation data are collected by means of the National Occupational Classification 2006. The monthly surveys are averaged to create the Labour Force Survey annual averages.

The LFS annual averages are used in this particular case study report in order to compare year-over-year trends related to the size of employment and levels of unionization in the industries of the tourism sector. Because the LFS is conducted on a monthly basis, it provides the most up-to-date snapshot of the Canadian labour force, but does not provide the level of detail or the sample size offered by the Census. For this reason, Census and LFS figures are complementary, but differ slightly from each other.

### 5.3.3 Canadian Business Register

Statistics Canada’s Business Register (BR), is the central repository for information on businesses in Canada. The BR data comes from various sources including the monthly Business Number (BN) master file from Canada Revenue Agency (CRA), profiling interviews with companies, survey feedback and internet research.<sup>54</sup> This data source provides information regarding the distribution of businesses in the tourism industry in terms of the number of persons they employ. The data is presented on a business location level. Thus, if a company has multiple locations, each location

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<sup>53</sup> Most recently, the LFS now covers the territories, however: National Labour Force Survey estimates are derived using the results of the LFS in the provinces. Territorial LFS results are not included in the national estimates, but are published separately.

<sup>54</sup> *A Brief Guide to the BR*. Statistics Canada, January 2009. ([www.statcan.gc.ca/imdb-bmdi/document/1105\\_D2\\_T1\\_V2-eng.pdf](http://www.statcan.gc.ca/imdb-bmdi/document/1105_D2_T1_V2-eng.pdf))

reports data individually, instead of a corporate headquarters office response, reporting data for all locations in its business portfolio.

In this case study report, the size of tourism businesses by number of employees is presented for the sector as a whole and for each industry group.

### 5.3.4 Compilation Methodology

As noted earlier, this section of the case study focuses on the process of using the definitions and delineation of Canadian tourism industries derived from the CTSA as a conceptual framework and basis for deriving customized tabulations of secondary data from the Census, the Labour Force Survey and the Business Register to compile information and report on the volumes of persons working in the Canadian tourism sector and its industry groups as well as some of their job characteristics and their geographic and occupational distributions. Census and LFS variables are also used in the same secondary analysis process to describe and compare the demographic characteristics of the people employed the tourism industries.

The basic methodology consists essentially of four steps: 1) taking data developed in the Census, and the Labour Force Survey of persons resident in Canada and employed persons respectively; and (2) filtering out those not employed within one of the recognized tourism industries specified in the Canadian Tourism Satellite Account; and (3) further filtering, and splitting them into 36 pre-identified tourism-related occupation categories of interest found in the Canadian National Occupational Classification system<sup>55</sup>; and then (4) further disaggregating and profiling them according to specified job and individual characteristics, such as full-time and part-time jobs, age group, gender, and such (CTHRC, 2012).

This case study features the major personal and work characteristics of employees in the tourism sector requested by the ILO for the Canadian best practice case study of measuring employment in tourism industries in terms of persons and their work characteristics including:

- Employment by type of establishment (size)<sup>56</sup> at national and regional levels);
- Employment by occupation<sup>57</sup>, sex<sup>58</sup>, age<sup>59</sup>, education attainment status<sup>60</sup>, labour union participation and coverage<sup>61</sup>;

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<sup>55</sup>Persons with two or more jobs were to report the information for the job at which they worked the most hours.

<sup>56</sup>The LFS captures data on the number of employees at the location of employment (building or compound) as collected from employees responses. Responses are recorded according to the following size groups: less than 20, 20 to 99, 100 to 500, more than 500 (Statistics Canada 2012).

<sup>57</sup>Occupation: an occupation refers to the kind of work persons aged 15 and over were doing during the reference week, as determined by the description of the main activities in their main job. The 2006 Census data on occupation are classified according to the *National Occupational Classification for Statistics 2006 (NOC-S 2006)*. See Appendix I for more details.

- Permanent / temporary employment<sup>62</sup>;
- Hours of work<sup>63</sup>; and,
- Employment by wages and salaries<sup>64</sup>.

In all instances, where feasible, the data presentation also illustrates the level of geographic detail that is supported by the current demographic profiling methodologies.

## 6. Results and findings of Canada’s initial approach to moving beyond the TSA

### 6.1. Workforce size of businesses in Canadian tourism industries

Table 3 was first prepared as a prototype custom tabulation test of the methodological approach described for Census data and LFS data but substituting instead data from the Canadian Business

<sup>58</sup>Sex/gender: refers to the gender of the respondent.

<sup>59</sup>Age: refers to the age at last birthday (as of the census reference date, May 16, 2006). See Appendix I for more details.

<sup>60</sup>Education attainment status: Information indicating the person's most advanced certificate, diploma or degree. See Appendix I for more details.

<sup>61</sup>Labour union coverage and membership: the LFS classifies employees according to their union status. See Appendix I for more details.

<sup>62</sup>The Canadian LFS collects information to allow the classification of paid jobs as either permanent or temporary. This classification is based on the intentions of the employer and the characteristics of the job rather than the intentions of the employee. A permanent job is one that is expected to last as long as the employee wants it, given that business conditions permit, i.e. there is no pre-determined termination date. A temporary job has a predetermined end date (Statistics Canada 2012).

<sup>63</sup>Hours worked: refers to actual hours worked during normal periods of work, including overtime but excluding paid leave (e.g., holidays, sick leave) (Statistics Canada, 2012:38). Original primary data is obtained from the LFS which collects information on the number of hours actually worked by the respondent during the reference week including paid and unpaid hours. (Statistics Canada 2012:26).

<sup>64</sup>Wages and Salaries: refers to monetary compensation and payments-in-kind (e.g., board and lodging), to wage earners and salaried persons employed in private, public and non-profit institutions in Canada including domestic servants and baby-sitters. Other forms of compensation included are commissions, bonuses, tips, directors’ fees, taxable allowances, and the values of stock options of corporations. Bonuses, commissions and retroactive wages are recorded in the period paid rather than earned. Wages and salaries are recorded on a gross basis, before deductions for taxes, employees’ contributions to employment insurance, and private and public pension plans (Statistics Canada, 2012:39). Data sources include administrative data (forms used by the Canada Revenue Agency for the employer to report the summary of remuneration paid to all employees who received salary, wages, tips or gratuities, bonuses, vacation pay, employment commissions and other remuneration (Statistics Canada, 2012:26) as well as survey data (Survey of Employment, Payrolls and Hours (SEPH)) collected monthly. SEPH collects the number of employee jobs and payroll data from a sample of establishments in Canada (Statistics Canada, 2012:28).

Register to reveal the workforce size of businesses, within Canadian tourism industries. As shown here, this tabulation reveals that businesses with no more than four employees predominate in Canadian tourism industries in 2006 (43.9%). Almost eight in ten (78.8%) tourism sector businesses that reported to the Canadian Business Register<sup>65</sup> indicated they had less than twenty employees. This is slightly lower than the Canadian economy as a whole, which reported having 86.8% of businesses in this category in 2006. It is interesting to note that the proportion of tourism businesses with 20-99 employees was larger than the proportion in Canada as a whole.

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<sup>65</sup> Businesses are only required to report if they have been allocated a GST number and/or if annual revenues reach a pre-determined amount.

**Table 3: Employment size of tourism sector businesses, 2006**

Number of employees	Canada	Tourism Sector	Accommodation	Food & Beverage Services	Recreation & Entertainment	Transportation	Travel Services
1 - 4	58.9%	43.9%	42.4%	37.2%	53.3%	57.4%	60.6%
5 - 9	16.6%	18.6%	18.2%	19.5%	17.2%	15.8%	21.3%
10 - 19	11.3%	16.3%	14.8%	19.5%	12.5%	10.5%	10.0%
<b>Total under 20</b>	<b>86.8%</b>	<b>78.8%</b>	<b>75.4%</b>	<b>76.2%</b>	<b>83.0%</b>	<b>83.7%</b>	<b>91.9%</b>
20 - 49	8.0%	14.0%	14.5%	16.7%	10.6%	8.9%	5.3%
50 - 99	2.8%	4.9%	5.5%	5.8%	3.6%	3.5%	1.6%
<b>Total 20 - 99</b>	<b>10.8%</b>	<b>18.9%</b>	<b>20.0%</b>	<b>22.5%</b>	<b>14.2%</b>	<b>12.4%</b>	<b>6.9%</b>
100 - 199	1.4%	1.5%	2.8%	1.1%	1.7%	2.0%	0.9%
200 - 499	0.7%	0.6%	1.5%	0.2%	0.8%	1.3%	0.2%
500+	0.3%	0.2%	0.3%	0.0%	0.3%	0.6%	0.1%
<b>Total 100+</b>	<b>2.4%</b>	<b>2.3%</b>	<b>4.6%</b>	<b>1.3%</b>	<b>2.8%</b>	<b>3.9%</b>	<b>1.2%</b>

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author, 2006 (from Canada Business Register custom tabulation).

Within the tourism sector it also noteworthy that the accommodation industry group at 4.6% and transportation at 3.9% had the highest proportions of businesses with one hundred or more employees; while the travel services (60.6%), transportation (57.4%) and recreation and entertainment (53.3%) industry groups had the highest proportions of micro business with 1-4 employees, in 2006.

## 6.2 Number of persons employed in Canadian tourism industries

Table 4 demonstrates the results of the application of the same custom tabulation approach to Census data to reveal the aggregate number of persons employed in tourism industries in Canada. Table 4 shows that 1,656,940 persons were employed in Canadian tourism industries in 2006, accounting for 10.3% of all employment in Canada.<sup>66</sup>

**Table 4: Percentage of persons employed in tourism industries and total economy by province and industry group (2006)<sup>67</sup>**

	Total Economy <sup>1</sup>	Tourism Sector	Accommodation	Food & Beverage Services	Recreation & Entertainment	Transportation	Travel Services
NL	1.3%	1.1%	1.4%	1.1%	0.8%	1.4%	0.8%
PEI	0.4%	0.4%	0.7%	0.5%	0.4%	0.2%	0.3%
NS	2.7%	2.6%	2.9%	2.7%	2.4%	2.5%	2.3%
NB	2.2%	1.9%	2.4%	2.2%	1.4%	1.6%	1.8%
QC	23.3%	22.0%	20.7%	22.3%	21.7%	22.5%	20.9%
ON	38.5%	37.6%	30.9%	37.7%	41.0%	36.8%	39.4%
MB	3.6%	3.6%	4.3%	3.4%	3.2%	4.5%	2.4%
SK	3.1%	2.8%	3.9%	2.9%	2.6%	2.3%	1.3%
AB	11.6%	11.2%	12.8%	11.3%	9.9%	11.9%	9.3%
BC	13.1%	16.4%	19.1%	15.7%	16.2%	15.6%	21.3%
<b>Total Employed</b>	<b>16,021,180</b>	<b>1,656,940</b>	<b>184,835</b>	<b>793,380</b>	<b>358,980</b>	<b>271,500</b>	<b>48,245</b>

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; from Canadian Census 2006, and Labour Force Survey 2006 custom tabulations of employed work force.

<sup>1</sup>Percentage figures do not total to 100% due to a combination of rounding error and the absence of 0.3% from the combined share of the three northern territories (Yukon, Northwest Territories, and Nunavut).

<sup>66</sup>Note that this represents the employed work force working in a main job in the tourism industries during the the Census reference week.

<sup>67</sup>Provincial jurisdiction abbreviations: Newfoundland-Labrador (NL), Prince Edward Island (PEI), Nova Scotia (NS), New Brunswick (NB), Quebec (QC), Ontario (ON), Manitoba (MB), Saskatchewan (SK), Alberta (AB), British Columbia (BC).

Figure 4 below compares the percentage shares of persons employed in tourism industries and the shares of tourism employment, respectively, by tourism industry group. These results reveal that the food and beverage services industry group accounted for *the largest proportion of persons employed among tourism industry groups* (47.9%), followed by recreation and entertainment (21.7%), transportation (16.4%), accommodation (11.2%), and lastly travel services<sup>68</sup> (2.9%), (CTHRC, 2012).

In contrast, as noted earlier, Figure 4 also shows the quite different percentage shares of *tourism employment* for the same year (2006), based on CTSA results. These alternative figures show that the largest share of tourism employment (i.e., jobs attributable to tourism demand) was within the accommodation industry group at 33.0%, followed by the Food and Beverages industry group at 31.8%, and then transportation (13.6%), recreation and entertainment (13.3%), and travel services (8.0%) respectively.

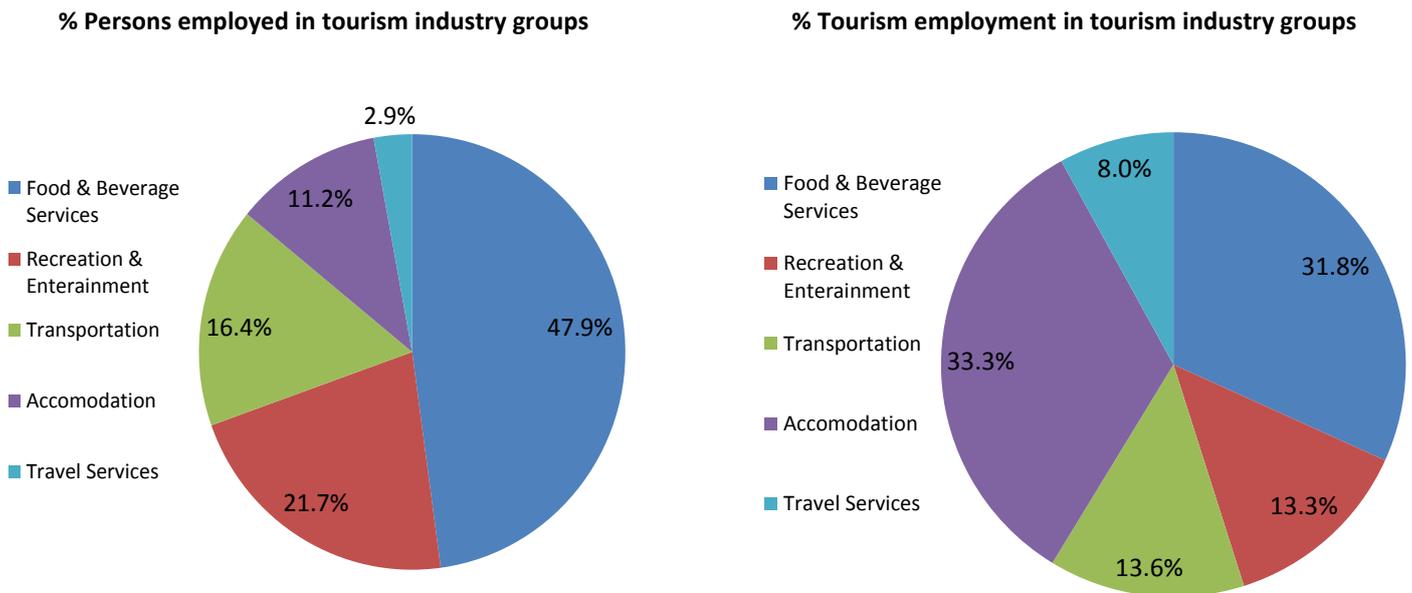
Table 4 also shows the regional distribution of persons working in tourism industries, as well as the total economy in Canada. These results reveal that Ontario and Quebec account for the largest shares of persons employed in tourism industries, making up about 50%, collectively, of all persons employed in tourism industries in Canada. Thus, at the sub-national jurisdiction level, the highest proportion of persons employed in tourism industries is found in Ontario at 37.6%, followed by Quebec (22.0%) and British Columbia (16.4%).

These three provinces also have the highest shares of persons employed in the overall economies of each jurisdiction (39.4%, 22.8% and 13.3%), demonstrating that the underlying population distribution provides one explanation for these tourism industry results. These results and other research of the geographical aspects of tourism development in Canada (Beshiri, R. 2005:3-4) indicate that generally, across most regions of Canada the size and percentage shares of both persons employed in tourism industries and *tourism employment* mirror the distribution of total employment by regional jurisdictions.

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<sup>68</sup> The Travel Services industry group includes travel agencies, tour operators, and other travel arrangement and reservation services.

**Figure 4: Shares of persons employed and tourism employment in tourism industry groups (2006) (employed work force)**



Sources: 1) Canadian Census 2006, Custom tabulation of employed workforce; 2) CTSA 2006, Unpublished worksheet, Table 2.

Table 4 also reveals that approximately the same regional geographical distributions of persons employed in Canadian tourism industries are found for each of the five major industry groups.

The main exceptions appear in Ontario and British Columbia as follows:

1) In Ontario, a lower concentration of persons employed in tourism is found for the accommodation industry (30.9% compared with 37.6% sector wide), while slightly higher concentrations of persons employed are found respectively in recreation and entertainment (41.0%) and travel Services (39.4%) industry groups; and,

2) In British Columbia a higher concentration of persons employed is found in the travel services industry group (21.3%) than in the overall sector (16.4%).

There appears to be no simple single explanation for these regional differences in the industry distributions of the number of persons employed within the tourism sector in Canada. Possible contributing factors could be the fact that local consumption influences industry structure mostly through the food and beverage and recreation and entertainment industry groups, as seen in Figure 4, which account for nearly two thirds of employment in the sector. Both have small tourism shares of overall consumption and Tourism GDP production functions, as found elsewhere in methodological descriptions of the CTSA (Kotsovos, D, 2007:42-45). Other possible contributing factors could be economies of scale from the concentrations of head offices of large enterprises in Ontario. Other factors possibly contributing to the larger proportions of persons employed in the travel services industry group in British Columbia and Ontario could be the high shares of outbound travel and larger shares of recent immigrants in their resident populations.

The results shown in Table 5, for the sub-regional level of major tourism destination municipalities, reveal that the volumes of persons employed in the tourism sector and the respective tourism industries in major urban centres, (i.e. Census Metropolitan Areas (CMAs), also broadly mirror the distributions of the total number of employed persons in their respective overall economies. Of Canada’s main destination Census Metropolitan Areas (CMAs), the largest city in Canada, Toronto, accounts for the largest proportion of persons employed in tourism overall as well as within industry group, (Table 5). Similarly, two much smaller regional urban centres, St. John’s, Newfoundland and Saskatoon, Saskatchewan respectively account for the lowest and second lowest proportions of employment in tourism industries for the overall sector as well as each major tourism industry group.

**Table 5: Percentage of persons employed in Canadian tourism sector by selected Census Metropolitan Areas and tourism industry group (2006)**

	Total Economy	Tourism Sector	Accommodations	Food & Beverage Services	Recreation & Entertainment	Transportation	Travel Services
<b>St. John's</b>	0.6%	0.5%	0.6%	0.5%	0.5%	0.6%	0.5%
<b>Halifax</b>	1.2%	1.4%	1.4%	1.3%	1.3%	1.5%	1.5%
<b>Québec</b>	2.4%	2.2%	2.9%	2.4%	1.9%	1.8%	1.9%
<b>Montréal</b>	11.5%	11.6%	6.9%	11.0%	13.2%	14.1%	14.6%
<b>Ottawa-Gatineau</b>	3.8%	3.3%	2.7%	3.5%	3.6%	2.9%	3.6%
<b>Toronto</b>	16.4%	15.6%	10.1%	14.6%	17.9%	17.7%	23.7%
<b>Winnipeg</b>	2.3%	2.5%	2.4%	2.4%	2.3%	3.4%	1.8%
<b>Saskatoon</b>	0.8%	0.8%	1.0%	0.9%	0.6%	0.7%	0.4%
<b>Calgary</b>	3.9%	4.2%	3.0%	4.1%	3.9%	5.9%	3.5%
<b>Edmonton</b>	3.6%	3.4%	3.0%	3.7%	3.1%	3.3%	3.3%
<b>Vancouver</b>	6.9%	8.9%	7.1%	8.6%	9.6%	9.2%	13.8%
<b>Rest of Canada</b>	46.6%	45.5%	58.9%	47.1%	42.1%	38.7%	31.4%
<b>Total Employed</b>	<b>16,021,180</b>	<b>1,656,940</b>	<b>184,835</b>	<b>793,380</b>	<b>358,980</b>	<b>271,500</b>	<b>48,245</b>

Source: Canadian Tourism Human Resource Council, (2012). *Who’s Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; Canadian Census 2006, and Labour Force Survey 2006 custom tabulation of employed work force.

Other research on the geographical distribution of *tourism employment intensity location quotients* has found that while tourism employment (due to tourism demand) as seen the results of the Provincial Tourism Satellite Accounts showed quite a bit of variation across provinces in terms of tourism shares of employment and GDP, that generally most regions in Canada have a location quotient of one – meaning that tourism employment in these regions has the same relative intensity as Canada as a whole. Somewhat surprisingly, the only exceptions were rural northern regions that showed the highest tourism employment intensity compared to Canada (Beshiri, R. 2005:9).

**Table 6: Persons employed in tourism industries in selected Canadian Census Metropolitan Areas and Census Agglomeration Areas in 2006 (including % in total employed work force)**

<b>Newfoundland</b>	<b>18,455</b>	<b>Saskatchewan</b>	<b>46,280</b>
<i>St. John's</i>	<i>48.2%</i>	<i>Saskatoon</i>	<i>26.7%</i>
<b>Quebec</b>	<b>364,225</b>	<b>Alberta</b>	<b>186,100</b>
<i>Québec City</i>	<i>10.1%</i>	<i>Calgary</i>	<i>37.6%</i>
<i>Montréal</i>	<i>52.9%</i>	<i>Edmonton</i>	<i>30.2%</i>
<b>Manitoba</b>	<b>60,360</b>	<b>British Columbia</b>	<b>270,935</b>
<i>Winnipeg</i>	<i>69.8%</i>	<i>Vancouver</i>	<i>54.4%</i>
<b>Ontario</b>	<b>622,315</b>	<b>Nova Scotia</b>	<b>43,165</b>
<i>Ottawa - Gatineau</i>	<i>8.9%</i>	<i>Halifax</i>	<i>51.8%</i>
<i>Toronto</i>	<i>41.5%</i>	<b>Prince Edward Island</b>	<b>7,145</b>
		<i>Charlottetown</i>	<i>51.7%</i>
<b>New Brunswick</b>	<b>31,860</b>	<b>Territories</b>	<b>6,100</b>
<i>Moncton</i>	<i>23.3%</i>	<i>Whitehorse</i>	<i>27.8%</i>
<i>Saint John</i>	<i>17.9%</i>	<i>Yellowknife</i>	<i>27.5%</i>

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; Canadian Census 2006, custom tabulation of employed work force.

On the other hand, from a combined urban and regional perspective, persons employed in tourism industries within the major CMAs and CAs (Census Agglomeration Areas) represent a substantial proportion of each province's tourism work force. For example, the city of Winnipeg has the highest regional concentration of tourism workers; representing 69.8% of the Manitoba provincial tourism work force, while tourism workers in Edmonton and Calgary combined comprised 67.8% of the province of Alberta's tourism work force, (Table 6). It is worth noting that these cities also have the highest concentrations of all workers in their regional total economies.

### **6.3. Demographics of persons working in Canadian tourism industries**

The Canadian Tourism Labour Market Information System also carries information that permits profiling persons working (including both employees and self-employed persons working in the tourism sector) in the Canadian tourism industries by a number of demographic characteristics. This document describes the main demographic characteristics of persons working in tourism industries in Canada of principle interest to Canadian THROs and also aligns with the expressed interests of the ILO, namely: gender, age, school attendance, educational attainment status, mother tongue, place of birth, and membership in public policy based equity groups, (Table 7). The following section describes the findings and insights into the distributions of personal

characteristics of persons working in Canadian tourism industries as revealed by custom tabulations of Canadian census data.

### **6.3.1 Gender**

In 2006, as well as preceding census years, women continued to account for a higher proportion of the tourism sector workforce than men (52.3% compared to 47.4%). (Table 7)

At the specific industry group level, the two largest employers, the accommodation and food and beverage service industry groups employed larger proportions of female workers, at 61.4% and 59.6% respectively. The gap was even greater in the travel services industry where 70.5% of workers were female. At the other end of the spectrum is the transportation industry group, which has a predominantly male workforce (71.9%). Within transportation, school and employee bus transportation was the only industry that employed a greater share of women than men. Unlike the other industry groups, the gender distribution of recreation and entertainment mirrored the overall work force. (Table 7)

### **6.3.2 Age**

The Canadian tourism sector work force is significantly younger than the Canadian work force as whole. In fact, in 2006, in Canadian tourism industries overall, almost one-third (32.8%) of workers were 15-24 years old, compared to 15.0% in the Canadian work force. Furthermore, 18.5% of tourism employees were between the ages of 25 and 34 years. (Table 7)

At the industry group level within the sector, the food and beverage services industry group employed the youngest work force (48.1% were 15-24 years of age). Notable exceptions to this trend were the transportation and travel services industry, with just 5.4% and 11.8% of their respective work forces in the 15-24 age range. Transportation in particular was dominated by older workers, being the only industry group to have the majority (53.6%) of its workers aged 45 and older. The accommodation and recreation and entertainment industries, for most occupations, also employed a higher percentage of young people than the Canadian work force a whole. (Table 7)

Despite these findings demonstrating that tourism industries in Canada may still be considered a “youthful” industry sector in terms of the people they employ, comparison with earlier analyses of data from the previous 2001 census of Canada indicates that the number of older workers is increasing. For example, the proportion of people working in accommodations who were 45 years or older increased by 8.7% since 2001. For the sector as a whole, the number of workers aged 45 years and older increased by 4.5% between 2001 and 2006 (Wright, 2007; CTHRC, 2012:16).

### **6.3.3 School attendance**

Consistent with the figures noted above on the youthful age of workers in the Canadian tourism work force, it is not too surprising to learn that demographic data on all employed persons in Canada also reveal that a relatively high proportion (28.4% in 2006) of tourism workers attended school compared to less than 16.7% of the workers in the overall economy. (Table 7)

Similarly at the industry group level, given the previous finding that the Food and Beverage industry group has the youngest workforce, it follows that food and beverage services also have the largest share of their workers attending school, of all the tourism industry groups. This may be due to the fact that the demographic data on person employed in tourism industries reveal that almost half (48.1% of this tourism industry's work force was between 15-24 years of age. (Table 7)

Similarly, given these results, it is also not surprising to find that this industry group also has the largest share of workers with only a secondary school (high school) certificate or equivalent (38.8%). (Table 7)

#### **6.3.4 Education levels**

As often noted in the tourism employment literature many jobs in tourism are associated with relatively low skill and education requirements. This generalization is supported in these Canadian data on persons working in tourism industries showing that most tourism workers in Canada have relatively low education levels compared with Canadian workers in general. Only about one in ten (12.3%) tourism workers hold a university certificate or degree compared to 22.3% of persons employed in the overall work force; whereas, 23.3% tourism workers had no certificate, diploma or degree compared with 14.5% in the overall Canadian workforce (Table 7). As just mentioned in the previous section, it is important to remember that many of these tourism workers are young persons who are still in school and have not yet reached their highest level of education.

However, at the industry group level within the tourism sector in Canada, the generalization about low education levels of tourism workers is not sustained. Indeed, the Canadian data on the demography of the workers in Canadian tourism industries reveal considerable variability in the education levels of workers across tourism industry groups. Thus, tourism workers in both the recreation and entertainment industry group and the travel services industry group have approximately the same shares of workers with a university certificate or degree (22.7% and 21.8% respectively) as is found in the overall Canadian work force (22.3%), (Table 7); while workers in the food and beverages, accommodation and transportation industry groups have much lower shares of workers with a university certificate or degree (7.2%, 11.8%, and 11.9%). Similarly, workers in the food and beverage, and accommodation industry groups have higher shares of workers with no certificate, diploma or degree (31.9% and 20.6% respectively) compared with the overall Canadian workforce at 14.5%. (Table 7)

#### **6.3.5 Mother tongue**

The Canadian tourism sector work force, compared to those working in the overall the Canadian economy, is also slightly more likely (22.1% compared to 20.1%) to have a mother tongue other than the two official languages of Canada, English or French. But, once again, at the industry group level, tourism workers are not homogeneous in this aspect. More precisely, three-in-ten (29.5%) workers in the travel services industry group reported speaking a mother tongue other than French or English, while only 13.4% of workers in the recreation and entertainment industry reported speaking a mother tongue other than French or English. (Table 7)

### **6.3.6 Place of birth**

Similarly, the 2006 Census tabulations for tourism sector workers reveal that the share of workers in the tourism work force who were born outside of Canada was slightly higher, at 23.7%, than the share found in the overall Canadian work force, at 22.1%. Once again, however, at the industry group level, tourism workers are not homogeneous in this demographic aspect. While persons working within the travel services industry group had a significantly higher proportion (33.6%) of workers born outside of Canada, reflecting this industry group's greater dependence on immigrants to meet its labour demands; the recreation and entertainment industry group had a significantly lower share of workers born outside of Canada (16.6%). (Table 7)

### **6.3.7 Equity target groups**

Workers in the Canadian tourism work force in 2006, compared to workers in the overall Canadian work force are slightly more likely to be members of visible minorities (18.8% compared to 15.1%); or also members of Canada's aboriginal peoples (3.2%, compared to 2.3%); but also they are slightly less likely to be self-reported as disabled persons (11.5% compared to 11.8%). (Table 7)

Once again, however, at the industry group level, considerable variation emerges with equity groups better represented in the accommodation (36.7%), food and beverage services (36.1%), travel services ( 35.5%), and transportation (34.0%) industry groups; but less represented in the recreation and entertainment industry group (25.6%). (Table 7)

## **6.4 Labour characteristics of persons employed in Canadian tourism industries**

Another innovation of the Canadian Tourism Labour Market Information System is that it also carries information that permits profiling persons employed in Canadian tourism industries by a number of other employment characteristics describing their work including the following attributes requested by ILO for presentation in this case study, namely: occupational distributions, employment status, temporal patterns of work, union membership and coverage as well as the current unemployment levels and rates for tourism workers. By applying the CTSA conceptual framework to custom tabulations of the monthly Canadian Labour Force Survey, this extension of the measurement approach, first developed for secondary analysis of the Canadian Business Register and the Canadian Census, reveals additional information about these additional work related aspects of persons employed in Canadian tourism industries.

**Table 7: Demographic characteristics of persons employed in tourism industries**

	<b>CANADA</b>	<b>TOURISM SECTOR</b>	<b>Accommodation</b>	<b>Food &amp; Beverage Services</b>	<b>Recreation &amp; Entertainment</b>	<b>Transportation</b>	<b>Travel Services</b>
<b>Total Employment</b>	<b>16,021,180</b>	<b>1,656,940</b>	<b>184,835</b>	<b>793,380</b>	<b>358,980</b>	<b>271,500</b>	<b>48,245</b>
<b>GENDER</b>							
Female	47.4%	<b>52.3%</b>	61.4%	59.6%	47.2%	28.1%	70.5%
Male	52.6%	<b>47.7%</b>	38.6%	40.4%	52.8%	71.9%	29.5%
<b>AGE</b>							
15-24 years old	15.0%	<b>32.8%</b>	22.8%	48.1%	27.3%	5.4%	11.8%
25-34 years old	19.9%	<b>18.5%</b>	19.9%	17.8%	20.7%	15.5%	24.6%
35-44 years old	24.6%	<b>18.6%</b>	20.2%	14.8%	19.8%	25.5%	25.1%
45 years and older	40.5%	<b>30.2%</b>	37.1%	19.2%	32.2%	53.6%	38.5%
<b>PLACE OF BIRTH</b>							
Born in Canada	77.9%	<b>76.3%</b>	73.9%	74.8%	83.4%	74.7%	66.4%
Born outside of Canada	22.1%	<b>23.7%</b>	26.1%	25.2%	16.6%	25.3%	33.6%
<b>MOTHER TONGUE</b>							
English	58.0%	<b>58.7%</b>	58.3%	56.1%	66.7%	57.0%	54.9%
French	21.9%	<b>19.1%</b>	18.5%	18.7%	19.9%	20.3%	15.5%
Other Language	20.1%	<b>22.1%</b>	23.2%	25.2%	13.4%	22.7%	29.5%
	<b>CANADA</b>	<b>TOURISM SECTOR</b>	<b>Accommodation</b>	<b>Food &amp; Beverage Services</b>	<b>Recreation &amp; Entertainment</b>	<b>Transportation</b>	<b>Travel Services</b>
<b>EQUITY GROUPS</b>							
Visible minorities	15.1%	<b>18.8%</b>	19.0%	22.7%	10.9%	17.4%	22.9%
Aboriginal Peoples	2.8%	<b>3.2%</b>	4.7%	3.1%	3.3%	2.8%	1.4%
Disabled persons	11.8%	<b>11.5%</b>	13.1%	10.3%	11.4%	14.0%	11.2%
<b>SCHOOL ATTENDANCE (in 2005-2006)</b>							
Attending school	16.7%	<b>28.4%</b>	20.3%	38.6%	27.1%	8.6%	13.8%
Not attending school	83.3%	<b>71.6%</b>	79.7%	61.4%	72.9%	91.4%	86.2%

EDUCATION LEVELS							
No certificate, diploma or degree	14.5%	<b>23.3%</b>	20.6%	31.9%	15.1%	14.2%	4.2%
High school or equivalent	26.1%	<b>34.6%</b>	32.9%	38.8%	30.0%	31.9%	21.6%
Apprenticeship/trades/ College/CEGEP certificate / diploma	32.4%	<b>25.9%</b>	30.2%	19.2%	27.1%	37.7%	44.9%
University below degree	4.8%	<b>3.9%</b>	4.5%	2.8%	5.0%	4.4%	7.5%
University certificate or degree	22.3%	<b>12.3%</b>	11.8%	7.2%	22.7%	11.9%	21.8%

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; Canadian Census 2006, custom tabulation of employed work force.

#### 6.4.1 Occupations

One of the key personal characteristics used to organize and retrieve labour market information is the occupational characteristics of both employees and available jobs within the tourism sector. As shown in Table 8, the Canadian tourism sector employs people in a very wide range of occupations. Some occupations (e.g. hotel front desk clerk) are mainly associated with the tourism sector; whereas, others (e.g. retail sales clerk, human resource manager/cashier) are found in various sectors including tourism.

**Table 8: Number of people in main occupations in tourism industries (1996) and percentage shares of employees in tourism industries and total economy**

	Occupation	Number of People	% of employees in tourism industries	% of total employment
G961	Food counter attendants, kitchen helpers and related occupations	225,535	13.6%	1.8%
G513	Food and beverage servers	177,880	10.7%	1.2%
G412	Cooks	140,370	8.5%	1.2%
A221	Restaurant and food service managers	91,105	5.5%	0.6%
H712	Bus drivers and subway and other transit operators	66,930	4.0%	0.5%
G311	Cashiers	57,770	3.5%	1.9%
G931	Light duty cleaners	47,160	2.8%	1.3%
F154	Program leaders and instructors in recreation, sport and fitness	41,725	2.5%	0.4%
H713	Taxi and limousine drivers and chauffeurs	38,735	2.3%	0.3%
G512	Bartenders	36,185	2.2%	0.2%
G411	Chefs	31,910	1.9%	0.3%
G012	Food service supervisors	28,580	1.7%	0.2%
G711	Travel counsellors	25,645	1.5%	0.2%
G211	Retail salespersons and sales clerks	23,695	1.4%	4.3%
A222	Accommodation service managers	23,155	1.4%	0.2%

G715	Hotel front desk clerks	21,935	1.3%	0.1%
I212	Landscaping and grounds maintenance labourers	20,560	1.2%	0.6%
G723	Casino occupations	19,090	1.2%	0.1%
G511	Maitres d'hôtel and hosts	18,325	1.1%	0.1%
G933	Janitors, caretakers and building superintendents	17,700	1.1%	1.3%
G731	Operators and attendants in amusement, recreation and sport	16,755	1.0%	0.1%
A211	Retail trade managers	12,340	0.7%	2.1%
C171	Air pilots, flight engineers and flying instructors	11,305	0.7%	0.1%
G712	Pursers and flight attendants	10,920	0.7%	0.1%
G713	Airline sales and service agents	10,745	0.6%	0.1%
G942	Bakers	8,385	0.5%	0.2%
B531	Accounting and related clerks	8,025	0.5%	1.1%
A131	Sales, marketing and advertising managers	7,065	0.4%	1.0%
B553	Customer service, information and related clerks	6,430	0.4%	1.2%
A373	Transportation managers	5,965	0.4%	0.2%
G721	Tour and travel guides	4,435	0.3%	0.0%
F112	Technical occupations related to museums and art galleries	3,940	0.2%	0.0%
G732	Other attendants in accommodation and travel	3,775	0.2%	0.0%
G714	Ticket agents and related clerks (except airline)	3,360	0.2%	0.0%
G722	Outdoor sport and recreational guides	2,555	0.2%	0.0%
G011	Retail trade supervisors	2,480	0.1%	0.4%
B316	Conference and event planners	2,430	0.1%	0.1%
A112	Human Resource Managers	2,040	0.1%	0.2%
<b>Subtotal</b>		<b>1,276,940</b>	<b>76.4%</b>	<b>8.0</b>
All other tourism occupations		382,040	23.1%	2.9%
<b>TOTAL TOURISM SECTOR EMPLOYMENT</b>		<b>1,656,940</b>	<b>100.0%</b>	<b>10.3%</b>
<b>Total Employed Labour Force in Canada</b>		<b>16,021,180</b>	<b>...</b>	<b>100.0%</b>

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; Canadian Census 2006, custom tabulation of employed work force.

The Canadian Tourism Labour Market Information System carries information that permits profiling persons employed in the *main occupations* found in all the industries of the tourism sector by all of the demographic characteristics discussed previously. The 38 *main occupations* described in Table 8 reflect 76.4% of the persons employed in Canadian tourism industries, or 1,276,940 persons and 8.0% of all persons employed in Canada. In addition, all of these occupational characteristics and the associated demographic characteristics of tourism workers are also available at both the provincial and sub-provincial geographic levels of aggregation in the Canadian Tourism Labour Market Information System.<sup>69</sup>

<sup>69</sup> The designation "main tourism occupations" is particular to the experience of the Canadian Tourism Human Resource Council in developing occupational standards and training programs for the Canadian tourism sector. All identified "main tourism occupations" have greater than 2000 persons working in each selected occupation within Canadian tourism industries. To date no internationally recognized standard criterion or procedure has been developed to identify characteristic, or specific, tourism occupations.

Table 8 also shows the very high level of dispersion of persons employed in Canadian tourism industries across the wide range of occupations just noted. The three most common occupations of persons employed in tourism industries are all found primarily in the food and beverage services and accommodation industry groups; namely *Food counter attendants* (13.6%), *kitchen helpers and related occupations* (10.7%), *food and beverage servers and cooks* (8.5%) . What is particularly noteworthy is that persons in these three occupational groups comprise almost a third of all persons employed in the Canadian tourism sector, while these three plus the other seven of the top ten occupational groups (*restaurant and food service managers, bus drivers and subway and other transit operators, cashiers, light duty cleaners, program leaders and instructors in recreation, sport and fitness; taxi and limousine drivers and chauffeurs and bartenders*) make up only a little more than half (55.6%) of all persons employed in Canadian tourism industries. Another 21.5% of the persons employed in the top 38 occupations in Canadian tourism industries are dispersed relatively evenly and thinly across the other remaining 28 occupations. (Table 8)

Yet another 22.9% of the persons employed in Canadian tourism industries are dispersed even more thinly across a wide variety of less frequently occurring occupations among persons working in Canadian tourism industries, representing a further 382,040 persons employed in tourism industries and 2.9% of all persons employed in Canada. (Table 8)

#### 6.4.2 Unemployment levels of the tourism labour force

This same analytical approach has been applied to monthly and annual LFS data to reveal the monthly and average annual unemployment levels and rates for employed workers<sup>70</sup> in tourism industries<sup>71</sup> compared with employed workers in the overall economy. As shown in Table 9 and Figure 5, these data reveal that in 2012, as well as the preceding four years after the advent of the global financial crisis and associated recession, the labour force of tourism industries is faring better than the overall economy with a sector specific annual average unemployment rate of 6.4% for 2012 compared with the national economy wide average of 7.2%. While unemployment among workers in tourism industries remains above the levels seen prior to the recession in 2008 (6.1%) the tourism unemployment rate has been consistently lower than the rate seen in the economy overall (Figure 5). Some of the well-known special characteristics of most jobs in the Canadian tourism industries might provide a partial explanation of these results, namely most jobs in the tourism sector:

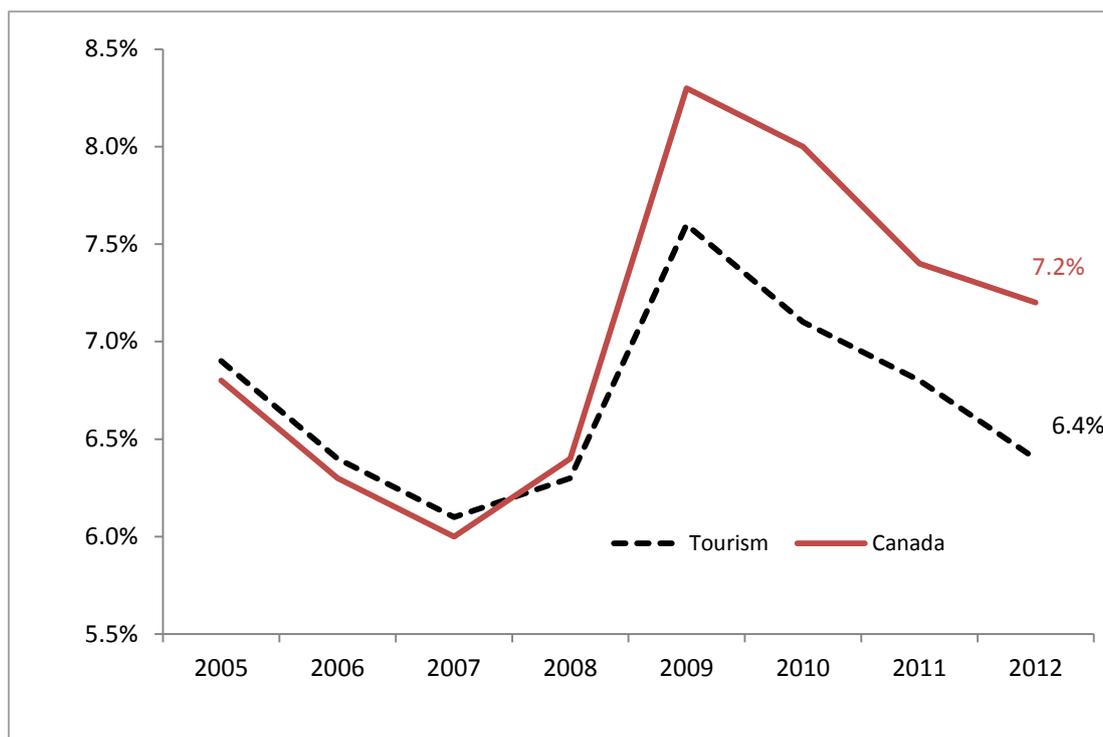
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<sup>70</sup>To determine unemployment rates industry classifications (NAICS) at the 4-digit level are based on the most recent job held within the past year, and are self identified by the respondent. Unemployed persons are those who, during the reference period, were available for work but were: on temporary layoff; were without work; or were to start a new job within four weeks.

<sup>71</sup>As defined by the Canadian Tourism Satellite Account, the NAICS industries included in tourism sector as Canadian tourism industries include those that would cease or continue to exist only at a significantly reduced level of activity as a direct result of an absence of tourism.

- often have lower skill requirements;
- often display significant mobility into and out of tourism industries; and,
- often display substantial movement between jobs and occupations within individual tourism industries and between industries within the sector.

**Figure 5: Annual Average<sup>72</sup> Unemployment Rates of the Tourism Sector and the Canadian Economy**



**SOURCE:** Canadian Labour Force Survey, 2012 Tourism Sector Highlights. Custom tabulation. (CTHRC, 2013).<sup>73</sup>

As with other social and economic characteristics at the industry specific level, however, the annual average unemployment rates for workers of the respective tourism industry groups differ widely from a high of 8.9% for the accommodation industries group to a low of 3.6% for the transportation industries group compared with 6.4% for all tourism industries, and 7.2% for the overall economy. (Table 9)

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<sup>72</sup> Estimated average annual unemployment rates for each year.

<sup>73</sup> [http://cthrc.ca/en/research\\_publications/labour\\_market\\_information/~media/Files/CTHRC/Home/research\\_publications/labour\\_market\\_information/Labour\\_Force\\_Survey/Labour\\_Force\\_Survey\\_Annual\\_Highlights\\_Current.ashx](http://cthrc.ca/en/research_publications/labour_market_information/~media/Files/CTHRC/Home/research_publications/labour_market_information/Labour_Force_Survey/Labour_Force_Survey_Annual_Highlights_Current.ashx)

**Table 9: Unemployment levels and rates of tourism workers by industry group (annual average), 2012**

	2012		
	Total Labour Force <sup>1</sup> (thousands)	Unemployed <sup>1</sup> (thousands)	Unemployment Rate <sup>1</sup> (Annual Average) (%)
<b>CANADA</b>	18,876.10	1,368.40	7.2
<b>Tourism Sector<sup>2</sup></b>	<b>1979.2</b>	<b>127.5</b>	<b>6.4</b>
Accommodation	215.0	17.9	8.3
Food & Beverage Services	903.2	59.2	6.6
Recreation &	465.2	35.7	7.7
Transportation	349.1	12.6	3.6
Travel Services	46.7	2.1	4.5

Source: Canadian Labour Force Survey, 2012, Customized tabulation.

<sup>1</sup>Estimated annual average over 12 months of the reference year.

<sup>2</sup>As defined by the Canadian Tourism Satellite Account.

Table 10 also shows, once again, the relatively wide range of variation in unemployment rates within the Canadian tourism industries at the regional level of specific provinces. The regional unemployment levels of tourism workers in 2012 vary from highs of 12.9% and 12.0% in Prince Edward Island and Newfoundland - Labrador to a low of 3.2% in Alberta, compared once again with the national annual average unemployment rates of 6.4% for the tourism sector and 7.2% for the overall economy. The regional variation in these figures demonstrates that it is misleading to speak of a single national tourism labour market within a national geography as large as, and as diverse economically and socially as that of Canada.

These mirror a very similar pattern in the overall unemployment rates for the total economy, with only Prince Edward Island standing out with a substantially higher unemployment rate in the tourism industries than the overall rate for the province.

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These mirror a very similar pattern in the overall unemployment rates for the total economy, with only Prince Edward Island standing out with a substantially higher unemployment rate in the tourism industries than the overall rate for the province.

**Table 10: Unemployment levels and rates of Canadian tourism industries' workers compared with overall unemployment rates by region (annual average), 2012**

	Total Labour Force <sup>1</sup>		Unemployed <sup>1</sup>		Unemployment Rate <sup>1</sup>	
	Total economy	Tourism Sector	Total economy	Tourism Sector	Total economy	Tourism Sector
	(Thousands)		(Thousands)		(percent)	
<b>CANADA</b>	18,876.1	1,979.2	1,368.4	127.5	7.2	6.4
Newfoundland & Labrador	263.3	23.3	32.8	2.8	12.5	12.0
P.E.I.	82.0	8.5	9.3	1.1	11.3	12.9
New Brunswick	500.4	55.5	44.9	4.6	9.0	8.3
Nova Scotia	391.4	33.5	40.0	3.0	10.2	9.0
Quebec	4,320.3	432.1	335.9	31.5	7.8	7.3
Ontario	7,357.2	759.7	573.5	49.2	7.8	6.5
Manitoba	665.4	69.4	35.3	3.6	5.3	5.2
Saskatchewan	563.8	52.1	26.7	2.3	4.7	4.4
Alberta	2,253.5	221.4	103.8	7.1	4.6	3.2
British Columbia	2,478.9	322.7	166.4	15.4	6.7	4.8

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; Canadian Census 2006, custom tabulation of employed work force.

<sup>1</sup>Estimated annual average over 12 months of the reference year.

<sup>2</sup>As defined by the Canadian Tourism Satellite Account.

### 6.4.3 Employee/self employment status

The LFS classifies workers as either *in paid employment* (i.e. *employees* (i.e., someone who works for others) or *self-employed* (i.e. working owners of an incorporated business farm or professional practice; as well as self-employed workers who do not own a business, such as babysitters).

**Table 11: Other labour characteristics of workers in Canadian tourism industries**

	TOTAL ECONOMY	Tourism Sector	Accommodations	Food & Beverage Services	Recreation & Entertainment	Transportation	Travel Services
Employees <sup>1</sup>	84.8%	87.1%	91.6%	92.9%	74.3%	87.5%	79.6%
Self-Employed	15.2%	12.9%	8.4%	7.1%	25.7%	12.5%	20.4%
Full-Time <sup>1</sup>	81.2%	64.3%	78.5%	53.4%	64.0%	81.2%	85.0%
Part-Time	18.8%	35.6%	21.5%	46.6%	36.0%	18.8%	15.0%
Seasonal (Part-year) <sup>2</sup>	38.4%	51.7%	52.8%	53.4%	58.1%	38.4%	39.9%
Union membership <sup>1</sup>	24.9%	13.7%	16.5%	2.5%	13.4%	46.7%	5.0%
Union Coverage <sup>1</sup>	26.7%	14.8%	16.9%	3.5%	16.0%	41.0%	4.0%

Source: Canadian Tourism Human Resource Council, (2012). *Who's Working for You? A Demographic Profile of Tourism Sector Employees*. Ottawa: Author; Canadian Labour Force Survey, 2012 Canadian Census 2006, custom tabulations of employed work force.

<sup>1</sup>Estimates derive from 2012 LFS survey data.

<sup>2</sup>Estimates derive from 2006 Census data.

As seen in Table 11, the majority (87.1%) of persons working in Canadian tourism industries work for others as employees, resulting in a lower level of self-employment (12.9%) than in the overall economy (15.2%) in 2012. Self-employment was highest in the recreation and entertainment industry group at 25.7% due to the high level of single proprietor micro businesses in this industry group and lowest in the food and beverage services industry group at 7.1% (Table 11).

#### 6.4.4 Temporal Work Patterns

Overall, the part-time and seasonal nature of work in Canadian tourism industries is also presented in Table 11 as revealed by LFS data on persons temporal patterns of work. Although part-time work is prevalent in Canadian tourism industries as whole (35.6%), it is particularly prevalent among workers in the food and beverage services industry group (46.6%) in 2012. Nonetheless, more than six in ten (64.3%) tourism employees work full-time, which is substantial less than the overall economy (81.2%). The highest levels of full-time employment are found among workers in the travel services industry group (85.0%). (Table 11)

In terms of seasonality of employment, Canadian tourism industries also employ fewer people (48.3%) in full-year positions than the overall Canadian economy (61.6%), (Table 11). At the same time, however, once again, there are large differences in seasonal work patterns across tourism industries. Recreation and entertainment (58.1%), food and beverage services (53.4%) and accommodation (52.8%) industry groups are more likely to employ people on a seasonal (part-year)

basis; while slightly less than four of ten travel services industry (39.9%) and transportation (38.4%) industry employees work on seasonal (part-year) basis<sup>74</sup>. (Table 11)

#### 6.4.5 Union Membership and Coverage by Union Agreements

The majority of workers in Canadian tourism industries are not members of a union or covered by a union contract or collective agreement<sup>75</sup>. In fact, in 2012 the proportion of unionized workers in the Canadian tourism sector (13.7%) was slightly more than half the share in the Canadian labour force overall (24.9%). The greatest proportion of union membership and coverage among tourism industry groups is found in the transportation industry group (46.7% and 41% respectively). On the other hand, union membership and coverage are least common in the food and beverages services (2.5% and 3.5%) and travel services industry groups (5.0% and 4.0%). (Table 11)

## 7. Another step beyond the TSA: the Canadian Tourism Human Resource Module

To further narrow the gap between decision makers' information requirements and available data regarding the social characteristics of tourism workers and the characteristics of tourism jobs; Canadian statisticians, tourism industry analysts, labour market researchers and tourism human resource management stakeholders collaborated in the late 1990s and early 2000s to develop another new integrated data base--the Tourism Satellite Account: Human Resource Module. This *tourism employment account* focuses on all of the jobs in tourism industries, selected characteristics of those jobs, plus selected characteristics of persons employ in Canadian tourism industries. Most importantly, the HRM bridges the two fundamentally different employment measurement perspectives identified earlier—"employment in tourism industries" and "tourism employment".

In May of 2013, Statistics Canada released a latest update, for reference year 2012, of the the Human Resource Module (HRM) of the Canadian Tourism Satellite Account (CTSA)<sup>76</sup>. This additional new integrated employment-employer-employee data framework was designed to complement and enhance the analytical capacity provided the other existing instruments and methodological procedures discussed previously such as the Canadian Tourism Satellite Account

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<sup>74</sup>Seasonality of employment data for workers in Canadian tourism industries are compiled from 2006 Census data unlike the other labour force characteristics data included in Table 11, which are derived from the 2012 LFS.

<sup>75</sup> The Canadian LFS classifies employees according to their union status: a) union member, b) not a member but covered by a union contract or collective agreement; or c)non-unionized. See Appendix I, Terminology for more details.

<sup>76</sup> See Statistics Canada 2012.Human Resource Module of the Tourism Satellite Account, 2012. Statistics Canada – Catalogue no. 13-604-M no. 70.

(CTSA), the National Tourism Indicators (NTI), the Demographic and Labour Profiles. These other pre-existing instruments and analytical processes that already provide some information on the number of jobs generated by tourism at the national level and the characteristics of those jobs as well as the numbers and characteristics of persons working in tourism industries. The aim of the Human Resource Module (HRM) is to provide more timely and reliable statistics on the human resource dimension of tourism with a higher degree of coherence and consistency than previous less integrated approaches (Martin, 2013:6).

The larger scope of the HRM allows for broader and deeper insights into the role of tourism in the economy by providing more detailed human resource information. For example, human resource planning involves all persons working in tourism industries regardless of whether their job comes directly from serving a visitor or from serving a local resident. Consequently, the total number of jobs in tourism industries is a major focus of the HRM and is much broader than the CTSA and the NTI, which portray only the jobs directly attributable to visitor spending. Similarly the HRM also has a much broader focus than either the Demographic Profiles or the Labour Profiles, which portray the persons working in jobs in tourism industries. In addition, some outputs of tourism industries are considered non-tourism commodities because tourism is not a significant source of their demand. Nevertheless, their production generates jobs in tourism industries, and these jobs are included in the overall human resource planning for tourism industries (Martin, 2013:6).

The HRM provides a snapshot of the tourism industries and their associated occupations as well as insights into trends over time. Analyses can be made on the following key statistics: jobs, hours worked and employment earnings starting from 1997. Derived variables, such as number of full-time equivalents, average hourly earnings and average annual hours worked per job can also be examined (Martin, 2013:6).

These key statistics can be analyzed according to various characteristics of the jobs (employee or self-employed, full-time or part-time, occupation group) and the characteristics of the persons holding them (sex, age group, immigrant status). Information by occupation is also available. Comparisons can be made to the Canadian System of National Accounts (CSNA) employment estimates for the overall economy and for selected industries as well as Canadian Tourism Satellite Accounts (CTSA) and National Tourism Indicators (NTI) aggregates (Martin, 2013:6).

## 7.1 Concepts

The HRM builds on many of the concepts and measures described earlier in reference to the CTSA and the profiles of the characteristic of the workers and work of persons employed in tourism industries. It introduces too some new concepts and measures of tourism related employment in the Canadian context. As just mentioned, the Human Resource Module (HRM) carries information on the number of *employee and self-employment jobs*, *full-time equivalent employment*, total number of hours worked and *labour income, gross wages and salaries* and *supplementary labour income*. These new basic concepts and definitions introduced in the HRM are described next. Further, it is worth noting that, as in the previous sections on profiles of the demographic and labour characteristics of persons working in tourism industries, these new concepts and definitions

are discussed from a total industry perspective first, that is to say, regardless of the source of demand, tourism or non-tourism (Martin, 2013:21).

The most important of these new concepts in the HRM from a tourism human resource development perspective is that the new concept of *total employment in a tourism industry* referring to the number of all employee and self-employment jobs in that industry.<sup>77</sup> It should be noted that a job that exists for only part of the year (for example four months) counts as only a fraction of a job (one-third of a job) for the year. It should also be noted that a part-time job at ten hours a week counts as much as a full-time job at 50 hours a week; each is one job. For this reason, jobs are not a good measure of labour inputs to production (Martin, 2012:21).

A better measure is *full-time equivalent employment* in which part-time jobs are converted to full-time jobs on the basis of hours worked. For example, two part-time jobs of twenty hours per week would be equivalent to one full-time job at forty hours per week (Martin, 2012:21).

Yet another employment indicator included in the HRM, is *total hours worked in a tourism industry*, which is an even better measure of aggregate volume of labour inputs to production, and the one used in the Canadian System National Accounts (CSNA) to calculate labour productivity. The concept here is that of actual hours worked, not usual hours, and of hours worked, not hours paid (Martin, 2012:21).

The value of labour inputs to production in an industry is measured by the *labour income* and a labour component of *mixed income* for all jobs in that industry. *Labour income* consists of gross (i.e., before tax) wages and salaries, including tips<sup>78</sup>, commissions, bonuses, as well as supplementary labour income which covers mandatory and non-mandatory employer contributions to pension plans and social insurance and similar health plan benefits<sup>79</sup>. *Mixed income* is the income after expenses of unincorporated business accruing to the self-employed<sup>80</sup> (Martin, 2012:21).

Several new socio-demographic variables are available also in the HRM. One of these, *immigrant status*, is defined as follows: an *immigrant* is a permanent resident who is not a Canadian citizen at birth or is a person who holds a study or work permit or who is a refugee claimant or is a family member living with a refugee claimant. A *non-immigrant* is a person who is a Canadian citizen at birth. (Martin, 2012:21).

## 7.2 Sources

Four main sources of data underlie the compilation of the Human Resource Module estimates. They are the Canadian Productivity Accounts (CPA) data in the Canadian System of National Accounts

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<sup>77</sup>It is noteworthy that the new HRM concept of *total employment in a tourism industry* or the number of all employee and self-employment jobs in that industry corresponds to IRTS 2008 Employment Concept II.

<sup>78</sup>For more information on tips see (Martin, 2013:23).

<sup>79</sup>Includes Medicare, dental plans, short-term and long-term disability plans, life insurance, etc.

<sup>80</sup>Mixed income is found in the CTSA. For the HRM, an imputation is made for the labour component of mixed income.

(CSNA), the Census, the Labour Force Survey (LFS) and the Survey of Employment Payroll and Hours (SEPH), (Martin, 2013:23). While the Census and the LFS have been describe previously, the two new sources—the CPA database and SEPH are described below along with their main contributions to the HRM.

### 7.2.1 Canadian Productivity Accounts

The CPA database in the CSNA provides the tourism industry group totals for employee jobs and hours worked, labour income, wages and salaries and supplementary labour income, for both full-time and part-time jobs. Comparable data are also available for self-employment jobs, but the income variable is the net income of unincorporated businesses. These totals are for all jobs, including those attributable to both tourism and non-tourism demand. The data are classified on a North American Industry Classification System (NAICS) basis by province (Martin, 2013:23).

The CPA data for jobs are based, in turn, on the LFS estimates for the number of persons employed. This is adjusted to jobs by adding the second jobs of multiple-job holders<sup>81</sup>. Additions are made for employment not covered by the LFS (e.g., regular military, employed persons in the territories or living on Indian reserves, and civil servants working in Canadian embassies abroad) to reflect the total economy. Last, deductions are made to exclude those absent from work without pay during the reference week.<sup>82</sup> SEPH is primarily used to develop the industry allocation of the adjusted LFS benchmarks, although industry surveys and administrative sources (for example T4 slips)<sup>83</sup> are also used for selected industries (Martin, 2013:23).

The hours worked data include the following:

- hours actually worked during normal periods of work
- time worked in addition to hours worked during normal periods of work, and generally paid at higher rates than the normal rate (overtime)
- time spent at the place of work on work such as the preparation of the workplace, repairs and maintenance, preparation and cleaning of tools, and the preparation of receipts, time sheets and reports
- time spent at the place of work waiting or standing-by for such reasons as lack of supply of work, break-down of machinery, or accidents, or time spent at the place of work during which no work is done but for which payment is made under a guaranteed employment contract
- time corresponding to short periods of rest at the workplace, including tea and coffee breaks.

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<sup>81</sup>Industry of second job is determined based on patterns observed for multiple job holders in the Survey of Labour Income Dynamics (SLID).

<sup>82</sup>For more details on the current CPA methodology see Maynard 2005.

<sup>83</sup>Forms used by the Canada Revenue Agency for the employer to report the summary of remuneration paid to all employees who received salary, wages, tips or gratuities, bonuses, vacation pay, employment commissions and other remuneration.

They exclude:

- hours paid for but not actually worked, such as paid annual leave, paid public holidays, paid sick leave
- meal breaks
- time spent on travel to and from home and work.

The hours worked data are adjusted to correct for reference week effects in order to estimate annual hours worked (Martin, 2013:23).

In the CSNA, industry totals for wages and salaries come from a detailed reconciliation of wages and salaries from survey data and T4 administrative data, i.e. annual income tax reports. Estimates for components of supplementary labour income come in part from the T4 system (e.g., employer contributions to Employment Insurance (EI) and Quebec and Canada Pension Plans (Q/CPP)), administrative data on registered pension plans and from Workers Compensation Boards, as well as other survey sources (for contributions like life, accident and health insurance) (Martin, 2013:23).

It should be noted that the average hourly earnings are calculated in the HRM as wages and salaries divided by total hours worked. Because tips<sup>84</sup> and pay for absences (sick leave, vacations, etc.) are included in wages and salaries, the hourly earnings include an implicit premium on top of the straight wage for both (Martin, 2013:23).

### 7.2.2 Survey of Employment, Payrolls and Hours

The Survey of Employment, Payrolls and Hours (SEPH) is conducted monthly to collect data on the number of employee jobs and payroll data from a sample of business establishments (Martin, 2013:25).

In this survey, establishments are coded by industry through the Business Register, thereby providing a reliable source of timely information on the industry distribution of employee jobs and payrolls. The administrative data are supplemented by the monthly Business Payroll Survey of 11,000 businesses. This survey collects data on employment, earnings and paid or usual hours, according to whether workers are paid by the hour, salaried or remunerated some other way (Martin, 2013:25).

SEPH data on a NAICS basis are available back to 1991. Data on the number of jobs, hours paid and earnings are used in the HRM to break down the CPA estimates so that they correspond to the definition of tourism industries used in the Canadian Tourism Satellite Account (CTSA). SEPH is also used extensively in the CSNA to determine the industry distributions of employee jobs (Martin, 2013:25).

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<sup>84</sup>For more information on the treatment of adjustments for tips see (Martin, 2013:23).

## 7.3 Methodology

As described in the methodology appendix of the most recent release of the HRM (Martin, 2013:26), the basic methodology consists essentially of six steps:

1. taking data developed in the CSNA for jobs, hours worked, and wages and salaries
2. disaggregating these totals using data from the CSNA for full-time and part-time jobs;
3. distributing the SNA totals for 2000 and 2005 across occupations, sex, age groups and immigrant status based on Census data;
4. building time series from these benchmarks based on movements in corresponding series from the Labour Force Survey;
5. smoothing the time series for LFS occupations, while keeping the overall industry group totals; and,
6. making limited, final adjustments to data values.

This last step completes the estimates for total employment of the HRM. For more details on the specifics of the methodology and associated technical assumptions see Martin, 2013: 26-27.

The output of the HRM consists of five main tables:

- Table 1. Supply of tourism commodities, tourism expenditures and jobs in tourism industries and total economy
- Table 2. Annual compensation and hourly compensation in tourism industries and total economy
- Table 3. Jobs in tourism industries and total economy
- Table 4. Weekly hours worked in tourism industries and total economy
- Table 5. Employee jobs, hours and wages by employee characteristics in tourism industries.

In addition, many other additional tables are produced by the HRM with further with details of employee jobs, hours and compensation broken out by industry, full-time/part-time status, occupation, age group, gender, and immigrant status.

## 7.4 Results of Human Resource Module 2012

This section extracts and highlights just a few of the many statistical results of the HRM to illustrate specific additional variables requested by ILO, as part of the Canadian case study, such as data on hours worked and salaries and wages, as well as key new perspectives on aspects of employment in tourism industries derived solely from the HRM for reference year 2012, namely: 1) Overall tourism sector key employment trends compared with the total economy, 2) Tourism industry profiles, 2) Occupations of jobs in tourism industries, and 3) Profiles of employees in tourism industries.

### 7.4.1 Jobs in tourism industries

Table 12 presents results derived from the 2012 Tourism Human Resource Module showing of key selected economic measures of the Canadian tourism sector compared to the total economy of Canada from 2006 to 2012. Highlighted variables include: gross domestic product (GDP), jobs,

tourism supply, jobs in tourism industries, tourism gross domestic product (at basic prices), tourism demand, and jobs generated by tourism demand revealing the economic significance of both tourism, and the industries respectively. This analysis focuses on the year 2012 and on comparisons with immediate preceding years, revealing the general economic conditions prevailing in Canada and in the industries of the tourism sector.

In 2012, tourism industries in Canada accounted for 1.7 million jobs, 9.4% of all jobs in Canada. Jobs include full- and part-time jobs, as well as employee jobs and jobs from self-employment (Martin, 2013:4).

The number of jobs in tourism industries grew by 1.5% outpacing job growth in the total economy (+1.0%) in 2012, whereas in 2010, growth in tourism jobs trailed the total economy (1.5% compared to 1.8%), (See Figure 6), (Martin, 2013:4).

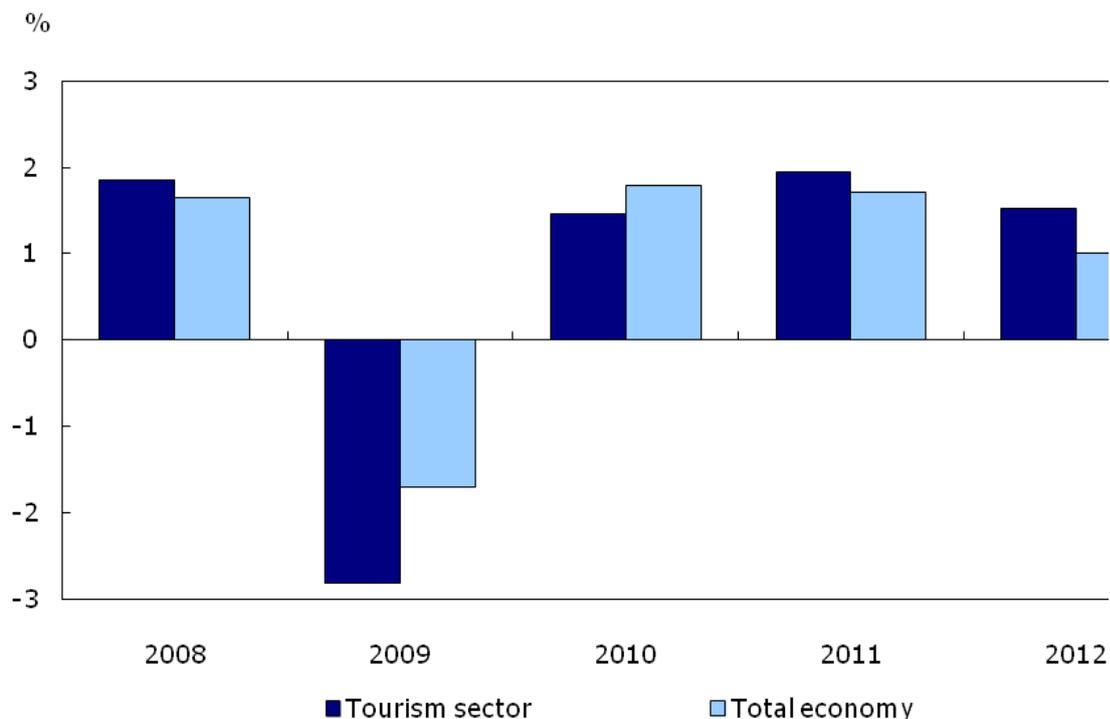
On average, job growth for the total economy surpassed job growth in tourism industries by 0.2 percentage points per year over the period 2007 to 2012. Notably the economy downturn of 2009 had a greater impact on the tourism industries (2.8% fewer jobs) compared to the total economy (-1.7%), (Figure 6), (Martin, 2013:4).

Tourism employment, that is jobs attributable to visitor consumption, in tourism industries totalled 496,000 in 2012, up 1.4% from the previous year, which was slower than the growth rate for all jobs in tourism industries (+1.5%), indicating higher growth in local consumption. It is important to note that the estimates of jobs directly attributable to visitor consumption in tourism industries (496,000) presented here in Table 12 are significantly less (-1,170,000) than the estimate of all jobs in tourism industries (1,686,000) (Martin, 2013:4)

It is also noteworthy that during the same reference period of 2012 total supply of tourism commodities in tourism industries at \$172,566 million (constant 2007 dollars), grew 1.2% in real terms, slightly less (-.2%) than rate of growth of jobs attributable to tourism demand in tourism industries, (Table 12), (Martin, 2013:15).

Meanwhile, overall tourism demand for tourism commodities in tourism industries grew slightly faster at 1.8% reaching \$62,708 million (constant 2007 dollars) in 2012, (Table 12), (Martin, 2013:14).

**Figure 6: Annual rate of job growth in tourism industries and total economy, Canada, 2008 to 2012**



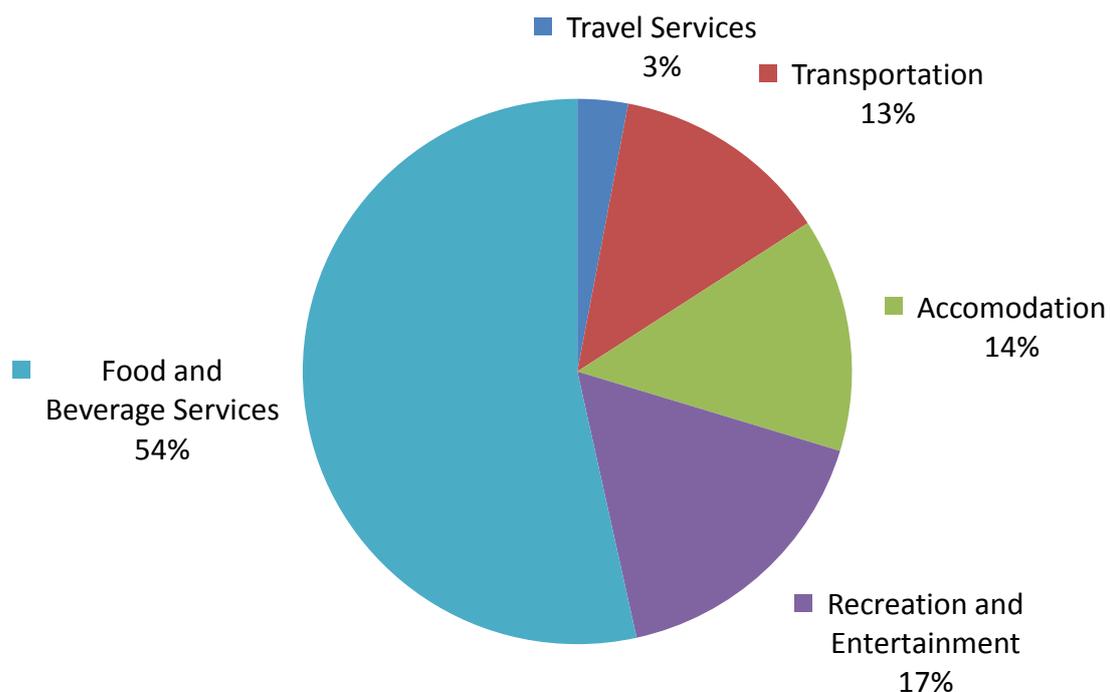
Source: Martin, T., *Human Resource Module of the Tourism Satellite Account 2012*, Ottawa: 2013

Nearly all job growth in tourism industries was in full-time employee jobs. About 33,000 such jobs were added in 2012, 23,000 of which were in the food and beverages industry group (Table 13).

Part-time jobs, on the other hand, make up almost 40 percent all jobs in tourism industries (664,000 jobs). By comparison, part-time jobs make up 22.4% of all jobs in Canada. The upward trend in the share of part-time jobs in tourism industries since 2007 was curtailed in 2012, (Table 13), (Martin, 2013:17).

Self-employment is less common in tourism, at 104,000, accounting for 6.2% of all jobs in tourism industries compared to 9.0% in the overall economy in 2012. The number of self employed in tourism industries fell by 2.6% when compared to the previous year, due to fewer self-employed jobs in the accommodation and food and beverage services industry groups. (Martin, 2013:17).

**Figure 7: Percentage distribution of jobs in tourism industries, 2012**



Figures have been rounded.

Source: Martin, T., *Human Resource Module of the Tourism Satellite Account 2012*, Ottawa: 2013

The food and beverages services industry group is the largest employer among tourism industries with more than half (53.4%) of all tourism jobs (915,000 jobs) in 2012. The second largest employer is recreation and entertainment at 16.7% with 275,000 jobs in 2012, followed by accommodation at 13.9% with 230,000 jobs. The transportation industry group was responsible for 222,000 jobs (13.1%), while travel services provided just 44,000 jobs at 2.7%, (Figure 7 and Table 13), (Martin, 2013:17).

#### 7.4.2 Hours worked in tourism industries

One of the major benefits of the HRM is that it also compiles data on another content subject area requested by ILO for coverage in this case study, hours worked in tourism industries. As shown in Table 14, working hours are shorter in tourism industries compared to jobs economy-wide in Canada (Martin, 2013:8). Furthermore, the average work week in the tourism industries decreased about 3.6% compared with -2.1% for the overall Canadian economy in the period following the global financial crisis in the fall of 2008 and the subsequent recession lasting until 2010 in Canada, (Table 14).

Jobs in tourism industries averaged 29.1 hours per week in 2012, up 1.0% from the previous year, compared to 32.9 hours for jobs economy-wide. The shorter week in tourism reflects the higher

proportion of part-time jobs found in tourism industries than in the total economy, (Table 14), (Martin, T., 2013:8).

On the other hand, jobs from self-employment in tourism industries involve longer working hours (33.7 hours per week) than jobs from self-employment economy-wide (31.6 hours per week ), (Table 13), (Martin, 2013:8).

The work week of the food and beverage services industry group, at 27.3 hours is the shortest among all tourism industries and was well below the average of 32.9 hours in 2012 economy-wide (see Table 13). This is largely due to the fact mentioned earlier that food and beverage services also hold the highest share of part-time jobs among tourism industries, (Table 13), (Martin, 2013:9).

At the other extreme, the travel services industry group, with the highest proportion of full-time jobs (84.7%) also had the longest work week, at 35.3 hours, (Table 13), (Martin, 2013:11).

**Table 12: Supply of tourism commodities, tourism expenditures and jobs in tourism industries and total economy, Canada, 2007 to 2012**

Measures of Economic Significance	2007	2008	2009	2010	2011	2012
<b>Total economy<sup>2</sup></b>						
Jobs (thousands)	17,101	17,382	17,086	17,391	17,687	17,864
percent change <sup>3</sup>	...	1.6	-1.7	1.8	1.7	1.0
<b>Tourism supply<sup>4</sup></b>						
Supply of tourism commodities <sup>5,6</sup>	166,068	167,379	163,128	167,012	170,477	172,566
percent change	2.5	0.8	-2.5	2.4	2.1	1.2
<i>Jobs in tourism industries (thousands)</i>	1,622	1,652	1,606	1,629	1,661	1,686
Percent change	2.2	1.9	-2.8	1.5	1.9	1.5
<b>Tourism demand<sup>7</sup></b>						
Tourism demand <sup>6</sup>	58,349	58,884	57,138	59,535	61,603	62,706
percent change	3.2	0.9	-3.0	4.2	3.5	1.8
<i>Tourism employment (thousands)</i>	492	497	488	483	489	496
percent change	0.9	0.9	-1.8	-0.9	1.2	1.4

Source: Excerpt from Statistics Canada. Canadian Tourism Human Resource Module, 2012, Table 1, (2013:15).

1. Source: Statistics Canada. CANSIM, Table 383-0031.
2. Not available for reference year 2007 due to historical revision of the CSNA.
3. Includes supply to local residents.
4. Excludes tourism commodities produced in non-tourism industries.
5. Excludes non-tourism commodities produced in tourism industries.
6. Figures expressed in millions of constant 2002 dollars.
7. Excludes demand by local residents. Excludes tourism commodities produced in non-tourism industries.

**Table 13: Jobs in tourism industries and total economy, 2006 to 2012**

	2007	2008	2009	2010	2011	2012	Percent change 2011 to 2012
<b>(thousands of jobs)</b>							
<b>Number of jobs in Canada</b>	<b>(thousands of jobs)</b>						<b>%</b>
Transportation	212	218	208	211	217	222	2.6
Air transportation	47	47	41	43	44	48	7.7
Other transportation	165	171	167	169	172	175	1.3
Accommodation	228	237	220	225	229	230	0.5
Food and beverage services	864	873	860	876	894	915	2.3
Recreation and Entertainment	272	277	274	274	276	275	-0.4
Travel services	46	48	44	44	45	44	-1.5
Employee	1,509	1,537	1,495	1,516	1,554	1,582	1.8
Self-employed	114	116	111	114	107	104	-2.6
Ratio self-employed to total tourism	0.070	0.070	0.069	0.070	0.064	0.062	...
Full-time	996	1,005	971	973	990	1,022	3.3
Part-time	627	648	635	657	671	664	-1.0
Ratio part-time to total tourism	0.386	0.392	0.395	0.403	0.404	0.394	...
Total tourism industries	1,623	1,653	1,606	1,629	1,661	1,686	1.5
percent change	2.5	1.9	-2.8	1.5	1.9	1.5	...
Total economy <sup>1</sup>	17,101	17,382	17,086	17,391	17,687	17,864	1.0
percent change <sup>2</sup>	...	1.7	-1.7	1.8	1.7	1.0	...
Ratio of tourism to total economy	0.095	0.095	0.094	0.094	0.094	0.094	...
Employee	15,468	15,787	15,449	15,753	16,060	16,256	1.2
Self-employed	1,633	1,615	1,637	1,637	1,628	1,608	-1.2
Ratio self-employed to total economy	0.096	0.093	0.096	0.094	0.092	0.090	...
Full-time	13,361	13,553	13,178	13,414	13,689	13,866	1.3
Part-time	3, 379	3, 829	3, 908	3, 977	3, 999	3,998	0.0
Ratio part-time to total economy	0.219	0.220	0.229	0.229	0.226	0.224	...

Source: Excerpt from Martin, T., Canadian Tourism Human Resource Module, 2012, Table 3 (2013: 17).

<sup>1</sup> Statistics Canada, CANSIM, Table 383-0031. <sup>2</sup> Not available for reference year 2007 due to the historical revision of the Canadian System of National Accounts.

**Table 14: Weekly hours worked in tourism industries and total economy, Canada, 2007 to 2012**

(thousands of jobs)	2007	2008	2009	2010	2011	2012	Percent change 2011 to 2012
<b>Weekly hours worked per job</b>	<b>(hours)</b>						<b>%</b>
Transportation	34.5	34.7	34.0	34.2	33.9	33.7	-0.6
Air transportation	32.4	31.8	32.1	33.0	32.5	32.4	-0.4
Other transportation	35.1	35.6	34.4	34.5	34.2	34.0	-0.6
Accommodation	33.1	32.6	31.7	31.5	31.5	31.9	1.1
Food and beverage services	28.0	27.9	27.2	26.9	26.8	27.3	1.7
Recreation and Entertainment	29.0	29.1	28.4	28.4	28.3	28.3	-0.2
Travel services	34.3	33.3	34.3	35.0	34.4	35.3	2.6
Employee	29.4	29.3	28.7	28.5	28.5	28.8	1.0
Self-employed	36.6	36.8	34.9	34.8	33.5	33.7	0.6
Ratio self-employed to employee	1.242	1.255	1.215	1.220	1.175	1.169	...
Full-time	38.8	38.9	38.0	37.9	37.8	37.9	0.2
Part-time	15.9	15.8	15.5	15.7	15.7	15.7	0.1
Ratio part-time to full-time	0.411	0.406	0.408	0.413	0.414	0.414	...
Total tourism industries	29.9	29.8	29.1	28.9	28.8	29.1	1.0
percent change	-0.1	-0.4	-2.4	-0.6	-0.3	1.0	...
Total economy <sup>1</sup>	33.4	33.3	32.7	32.7	32.7	32.9	0.7
percent change <sup>2</sup>	...	-0.4	-1.9	0.1	-0.2	0.7	...
Ratio of tourism to total economy	0.895	0.895	0.890	0.885	0.883	0.885	...
Employee	33.4	33.3	32.7	32.8	32.8	33.0	0.7
Self-employed	33.7	33.2	32.3	31.9	31.4	31.6	0.6
Ratio self-employed to employee	1.010	0.995	0.987	0.972	0.957	0.956	...
Full-time	38.2	38.1	37.6	37.7	37.5	37.7	0.6
Part-time	16.3	16.3	16.2	16.0	16.0	16.1	0.4
Ratio part-time to full-time	0.427	0.429	0.432	0.424	0.427	0.426	...

Source: Excerpt from Martin, T., Canadian Tourism Human Resource Module, 2012, Table 4 (2013: 18).

<sup>1</sup> Statistics Canada, CANSIM, Table 383-0031.

<sup>2</sup> Not available for reference year 2007 due to the historical revision of the Canadian System of National Accounts.

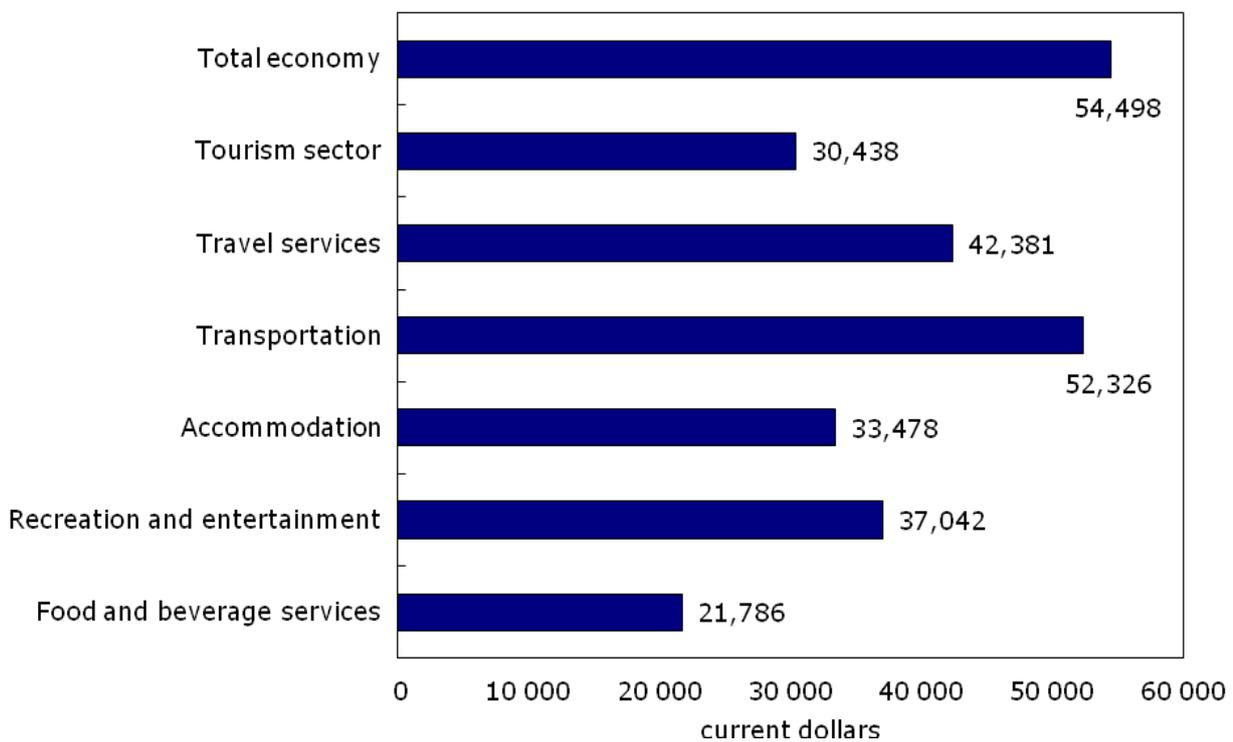
### 7.4.3 Compensation for jobs in tourism industries

The HRM also carries information on both hourly and annual compensation in tourism industries<sup>85</sup>; two other variables also requested for coverage in this case study. Hourly compensation in Canadian tourism industries averaged \$20.10 per hour in 2012, up 1.1% from the previous year (see Table 15), but still much lower than the hourly compensation economy-wide of \$31.86.<sup>86</sup> The gap between hourly compensation in tourism industries versus the total economy has widened from \$10.40 in 2007 to \$11.76 in 2012, (Table 15), (Martin, 2013:9).

The gap in hourly compensation between full-time workers and part-time workers in tourism industries is also noteworthy. In 2012, hourly compensation for full-time workers in tourism industries was \$21.30 while part-time workers received \$15.62, (Table 15), (Martin, 2013:9).

Within tourism industries, jobs in food and beverage service industries pay the least of all tourism industries with an average hourly compensation of \$15.36 in 2012 up 0.5% from the previous year. It remains well below the averages of \$20.10 for all tourism industries, and \$31.86 economy-wide, (Table 15), (Martin, 2013:9).

**Figure 8: Annual compensation in tourism industries in Canada, 2012**



Source: Martin, T., *Human Resource Module of the Tourism Satellite Account 2012*, Ottawa: 2013

<sup>85</sup> Compensation is defined as wages and salaries, supplementary labour income and the labour portion of income after expenses accruing to the self-employed.

<sup>86</sup> It should be noted that assumptions used to estimate labour compensation in tourism are not exactly the same as the ones used for the total economy, as explained in Statistics Canada, 2012, Appendix D, Methodology.

At the other extreme, the best paying jobs in tourism industries are found in the transportation industry group, with an hourly compensation of \$29.88, well above the average across all jobs in the sector. Hourly compensation was particularly high in air transportation at \$39.48 per hour in 2012, (Table 15), (Martin, 2013:11).

**Table 15: Annual compensation and hourly compensation in tourism industries and total economy, Canada, 2007 to 2012**

	2007	2008	2009	2010	2011	2012	Percent
<b>Annual compensation in Canada for all</b>	(millions of current dollars)						%
Total tourism industries	44,710	46,805	45,738	47,527	49,517	51,328	3.7
percent change	5.4	4.7	-2.3	3.9	4.2	3.7	...
Total economy <sup>1</sup>	835,90	871,61	868,62	896,29	936,30	973,54	4.0
percent change <sup>2</sup>	..	4.3	-0.3	3.2	4.5	4.0	...
Ratio of tourism to total economy	0.053	0.054	0.053	0.053	0.053	0.053	...
<b>Hourly compensation in Canada per</b>	(current dollars)						
Transportation	28.73	28.67	29.77	28.56	29.29	29.88	2.0
Air transportation	37.79	39.53	41.85	39.50	39.92	39.48	-1.1
Other transportation	26.34	26.01	27.00	25.92	26.69	27.38	2.6
Accommodation	17.65	18.08	18.63	19.43	19.69	20.19	2.6
Food and beverage services	12.84	13.60	14.16	14.96	15.29	15.36	0.5
Recreation and Entertainment	21.65	21.95	22.43	23.52	24.56	25.16	2.4
Travel services	21.72	22.16	21.84	22.69	23.41	23.11	-1.3
Employee	17.81	18.43	19.02	19.59	20.04	20.25	1.0
of which: wages	15.91	16.44	16.83	17.40	17.79	17.97	1.0
Self-employed <sup>4</sup>	16.50	16.50	16.54	17.12	17.82	18.18	2.0
Ratio self-employed to employee	0.926	0.896	0.870	0.874	0.889	0.898	...
Full-time	18.76	19.38	19.90	20.61	21.11	21.30	0.9
Part-time	13.59	13.99	14.72	15.00	15.49	15.62	0.8
Ratio part-time to full-time	0.725	0.722	0.739	0.728	0.734	0.733	...
Total tourism industries <sup>3,4</sup>	17.70	18.26	18.81	19.38	19.88	20.10	1.1
percent change	2.8	3.2	3.0	3.0	2.5	1.1	...
Total economy <sup>1</sup>	28.10	28.97	29.90	30.29	31.17	31.86	2.2
percent change <sup>2</sup>	...	3.0	3.3	1.3	2.9	2.2	...
Ratio of tourism sector to total economy	0.630	0.631	0.629	0.640	0.638	0.631	...
Employee	29.12	29.89	30.91	31.23	32.11	32.83	2.2
of which: wages	25.48	26.20	26.81	27.07	27.86	28.20	2.2
Self-employed	18.60	19.63	20.22	20.94	21.49	21.61	0.6
Ratio self-employed to employee	0.639	0.657	0.654	0.670	0.669	0.658	...
Full-time	28.25	29.08	30.06	30.39	31.23	31.87	2.0
Part-time	26.87	27.81	28.62	29.52	30.70	31.77	3.5
Ratio part-time to full-time	0.951	0.956	0.952	0.972	0.983	0.997	...

Source: Excerpt from Martin, T., Canadian Tourism Human Resource Module, 2012, Table 2 (2013: 16).

<sup>1</sup> Statistics Canada, CANSIM, Table 383-0031.

<sup>2</sup> Not available for reference year 2007 due to the historical revision of the Canadian System of National Accounts.

<sup>3</sup> Hourly compensation includes wages and salaries, supplementary labour income and the labour portion of mixed income after expenses accruing to the self-employed.

<sup>4</sup> Excludes supplementary labour income from the labour portion of mixed income for the self-employed.

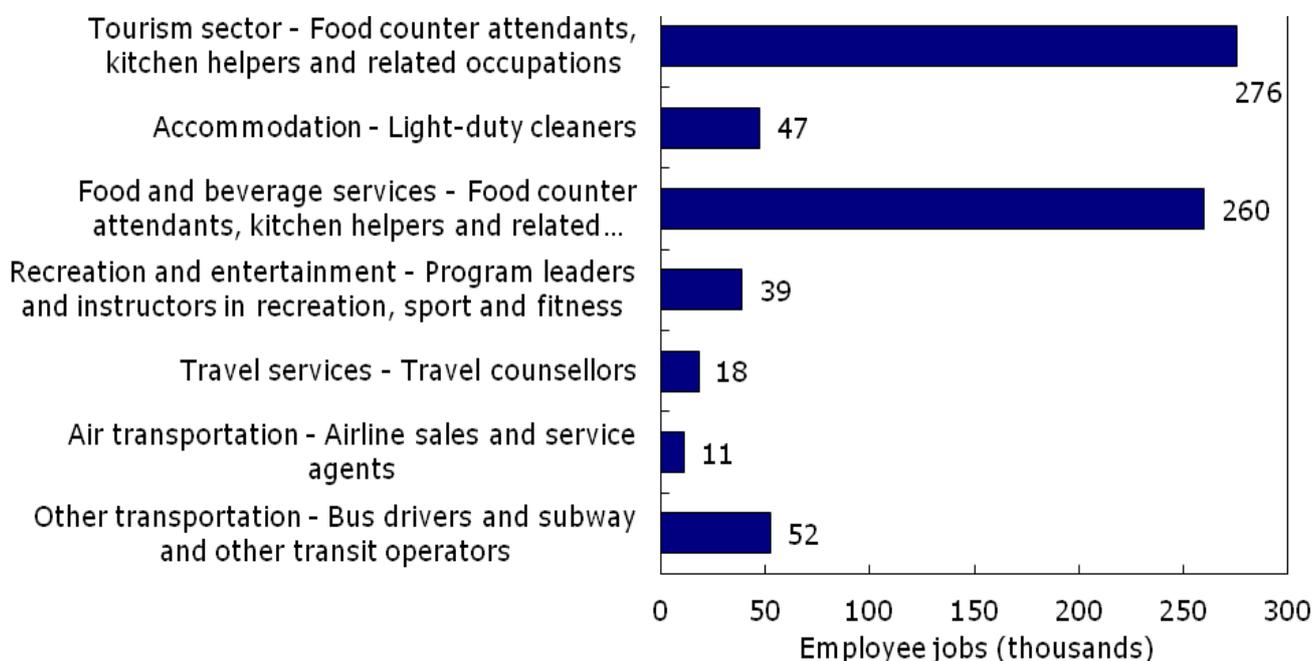
On an annual basis, jobs in the food and beverage services industry group pay the least of all tourism industries, at \$21,786 on average in 2012, well below the tourism sector average, but above the 2011 food and beverage services average of \$21,039, due to increases in weekly hours worked and hourly compensation. Jobs in food and beverage services also involved the fewest working hours per week and were paid the least on an hourly basis in the tourism sector, (Table 15), (Martin, 2013:11). The transportation industry group, by contrast, is the only industry group with an annual compensation (\$52,326) approaching the national average of \$54,498 for 2012. The long work week and the high hourly compensation in both air and other transportation contribute to these differences, (Table 15), (Martin, 2013:9).

#### 7.4.4 Occupations of employee jobs in tourism industries

An earlier section of the case study examined Canadian data on *occupations as a characteristic of persons working in Canadian tourism industries*. This section presents information on occupations in tourism industries as also compiled in the HRM from *the perspective of employee jobs within Canadian tourism industries*.

Five occupation groups dominate employee jobs in tourism industries, accounting for approximately half of all employee jobs, namely: food-counter attendants, kitchen helpers and related occupations with 276,000 jobs; food and beverage servers with 188,000 jobs; cooks with 150,000 jobs; cashiers with 71,000 jobs; and restaurant and food service managers with 67,000 jobs in 2012. Furthermore, these occupations also dominated the food and beverage services industry group. In fact, of the jobs in the five top occupations, more than nine out of ten are concentrated in the food and beverage services industries (Martin, 2013:11).

**Figure 9: Main occupation in each tourism industry group in Canada, 2012**



Source: Martin, T., *Human Resource Module of the Tourism Satellite Account 2012*, Ottawa: Statistics Canada, 2013.

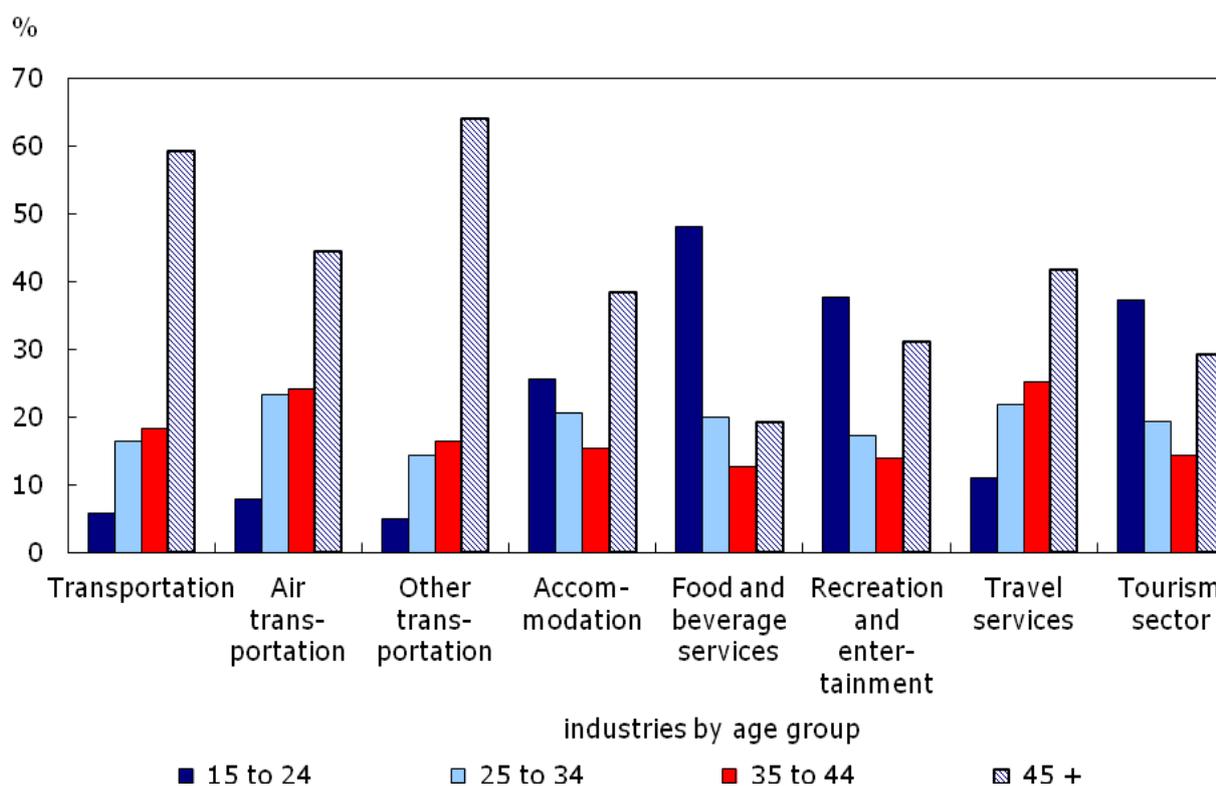
From another perspective, as shown in Figure 9 above, a different main occupation predominates in each industry group within the tourism industries: food-counter attendants, kitchen helpers and related occupations (276,000 jobs) is the main occupation in the food and beverage services industry; light duty cleaners (47,000 jobs) for the accommodation industry group; program leaders and instructors in recreation, sport and fitness (39,000 jobs) predominate in the recreation and entertainment industry group; travel counsellors (18,000 jobs) predominate in the travel services industry group; airline sales and service agents (11,000 jobs) predominate in the air transportation industry group; and bus drivers and subway and other transit operators(52,000 jobs) predominate in the other transportation industry group.

#### 7.4.5 Employee job shares of youth and older workers in tourism industries

The HRM provides details about three key personal characteristics of incumbents of employee jobs in tourism industries: age group, gender and immigrant status. This section highlights some of the recent HRM results for two of these key demographic characteristics to the current and future industry labour market situation – age group and immigrant status.

Youth aged 15 to 24 are a major source of labour for the tourism industries in Canada. In 2012, they held 598,000 employee jobs, accounting for a third of all employee jobs in tourism. Three out of four young workers were employed in the food and beverage services industries. The most common occupation among youth was food counter attendants, kitchen helpers and related occupations, and two out of every three such jobs was held by a young worker (see Figure 10), (Martin, 2013:13).

**Figure 10: Share of jobs by age group and by tourism industry in Canada, 2012**



Source: Martin, T., *Human Resource Module of the Tourism Satellite Account 2012*, Ottawa: Statistics Canada, 2013.

Older workers, aged 45 years or older, are also an important source of labour for tourism industries, holding 463,000 employee jobs (29.2%) in 2012. Generally, older workers are employed more evenly across all tourism industries compared to young adults. One tourism industry group employed a notably older workforce in 2012: older workers accounted for 64.1% of all employee jobs in transportation industries other than air. By comparison, the next oldest workforce was that of air transportation, with 44.6% of all employee jobs held by persons aged 45 years or older, (Figure 10), (Martin, 2013:13).

At the other end of the age spectrum, almost seven out of ten young workers in tourism industries hold part-time jobs compared to about one out of four older workers. The vast majority of young adults who work part-time are in the food and beverage services industry group. In 2012, young adults worked about half the hours per week (17.7) hours of older workers (35.0 hours). The gap was greatest in the recreation and entertainment industries, with younger adults averaging 15.0 working hours per week versus 34.6 hours for older workers (Martin, 2013:14). According to the Labour Force Survey, in 2012 about 72% of young workers gave attending school as their main reason to be working part-time.<sup>87</sup>

Wages of young workers were also considerably lower. The hourly wage among workers in tourism industries aged 15-24 was \$12.10 in 2012, just over half that of employees aged 45 and over (\$21.83). The wage differential between young and old workers was the most pronounced in the air transportation industry group, \$15.52 versus \$40.00, respectively (Martin, 2013:14).

#### 7.4.6 Profile of Immigrants

Immigrants are another important source of labour as well as being a current strategic policy issue for the growth and development of Canadian tourism industries. In 2012, immigrants held 354 thousand jobs, accounting for 22.4% of employee jobs in tourism (Martin, 2013:14).

Over sixty percent of all immigrants employed in the sector worked in the food and beverage services industry, compared to 55.4% of non-immigrants. On the other hand, only 8.4% of all immigrants employed in the sector worked in recreation and entertainment compared to 16.0% of non-immigrants. The concentrations were similar between immigrants and non-immigrants in other tourism industry groups.

Immigrants in tourism industries were older than other tourism workers. About four out of ten immigrants were 45 years or older, while one out of four non-immigrants was an older worker (Martin, 2013:14).

Compared to non-immigrants (57.5%), immigrants (70.9%) were more likely to work full-time. In 2012, immigrants worked longer hours than their non-immigrant counterparts, 33.8 hours per week versus 27.4 hours (Martin, 2013:14).

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<sup>87</sup> Source: Statistics Canada. Table 282-0014 – Labour force survey Estimates (LFS), part-time employment by reason for part-time work, sex and age group, annual (persons), CANSIM.

Immigrants earned lower wages per hour (\$17.31 per hour) than non-immigrants (\$18.21 per hour). Wages for immigrants were lower in all tourism industries with the exception of accommodation and recreation and entertainment. Even though immigrants earned lower wages per hour on average, they compensated by working longer hours. Annual salaries for immigrants averaged \$30,400, compared to \$25,936 for non-immigrants. (Martin, 2013:14).

## 8. Alignment with international standards

In preparing this case study, attention has been given to the Canadian approaches to measuring employment in tourism industries, with the various concepts, definitions, measures and categories of tourism employment outlined in Chapter 4 and Table 7 of the Tourism Satellite Account: Recommended Methodological Framework (2008), as well as in Chapter 7 of the International Recommendations for Tourism Statistics (2008).

Chapter 7 of IRTS (2008) describes employment in tourism industries from a general social statistical perspective rather than a specific national accounting perspective and also suggests a broader range of employment and labour related indicators that can be linked with tourism industries in an expanded employment jobs and labour data framework such as those illustrated previously in this case study and the Canadian Tourism Labour Market Information System (TLMIS).

As noted in the IRTS (2008), depending on user needs and available data sources, employment in the tourism industries can be expressed in terms of:

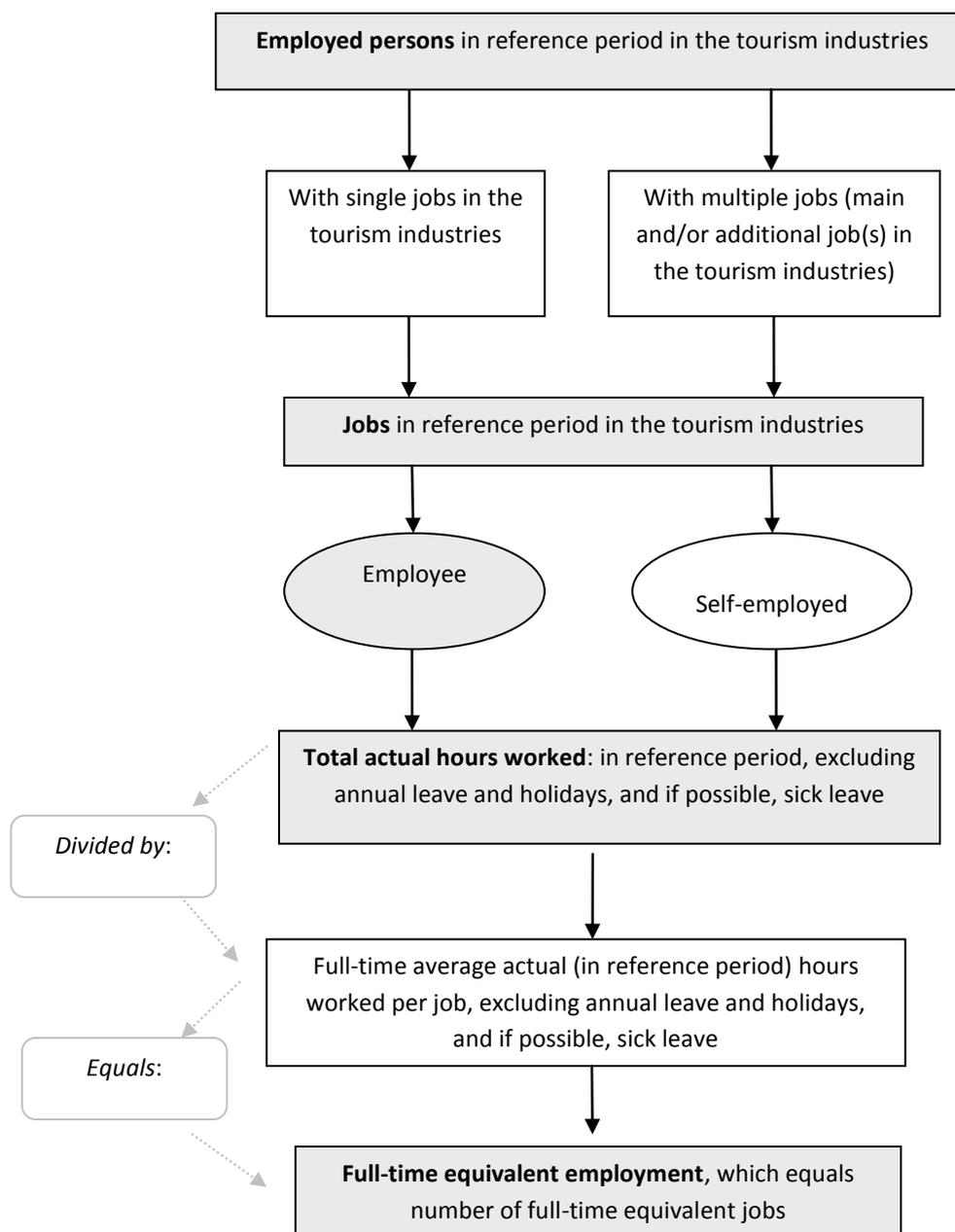
- 1) Number of jobs strictly related to the goods and services acquired by visitors;
- 2) Number of jobs (full-time/part-time) in tourism industries (or attributable to tourism demand);
- 3) Number of hours of work in tourism industries (or attributable to tourism demand);
- 4) Full-time equivalent employment (FTEs) in tourism industries (or attributable to tourism demand); or alternatively,
- 5) Number of persons employed in tourism industries.

Figure 11 from the IRTS (2008: 66) (shown below) illustrates some of these relationships between employed persons and jobs, and the types of conceptual measurement options that have been described. It excludes, however, jobs directly attributable to tourism demand that lie outside of tourism industries such as those of sales persons in the retail and agriculture sectors that sell over-the-counter drugs, souvenirs and /or fruit and vegetables to tourists.

The TSA: RMF (2008) notes further that, while “labour as a factor of production can be associated with the total output of an establishment”; it “cannot be assigned to any particular output or part of output” such as tourism, which is fundamentally a particular form of consumer demand, “without the use of specific assumptions and modeling procedures” (TSA: RMF (2008), page 48). “Tourism employment as meaning the employment strictly related to the goods and services

acquired by visitors and produced either by tourism industries or other industries cannot be directly observed". For this reason, the TSA: RMF (2008) recommends using "only the estimation of employment in the tourism industries for the purposes of international comparisons of the employment aspects of tourism (TSA: RMF (2008) page 48)".

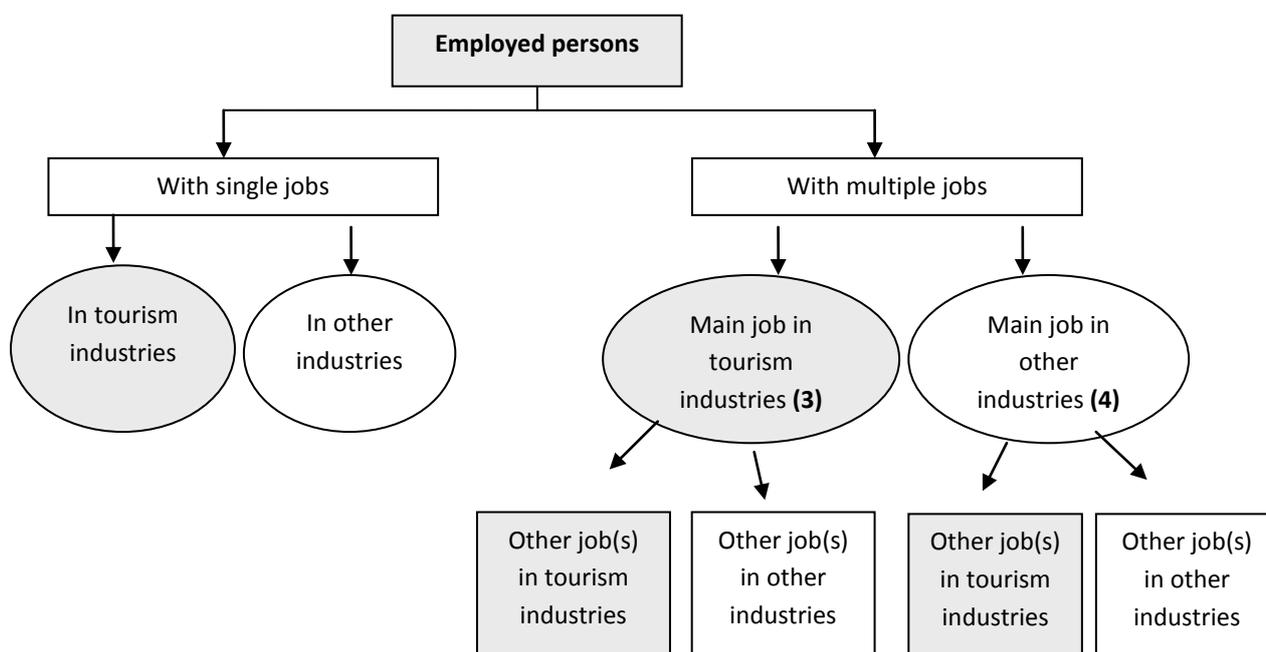
**Figure 11: Relationship between different measures of employment in tourism industries**



Source: Adapted from *International Recommendations on Tourism Statistics*, 2008, p.66.

Chapter 7 of the IRTS (2008) provides even further conceptual clarification and specification of the distinction between jobs and employed persons in the tourism sector noting that “Persons may have two or more jobs during a given reference period, and all, some or none of these jobs may be undertaken in the tourism industries”. This leads to three further specified conceptual alternatives for measures of employment in the tourism industries that treat differently the distinction between *employed persons* and *jobs* as shown below in Figure 12.

**Figure 12: Single versus multiple job holders in tourism industries**



- Concept I. Persons employed in the tourism industries (all jobs) = 1, 3, 4a;
- Concept II. Persons employed in the tourism industries (main job) = 1, 3;

**Source:** Adapted from *International Recommendations on Tourism Statistics*, 2008. p. 63.

Notwithstanding these recommendations for international comparison purposes, as noted earlier, the tourism related employment estimates compiled in the Canadian TSA include measurements of only one of the above noted employment concepts, *the number of jobs attributable to tourism demand in tourism and non-tourism industries*. By way of explanation, it must be remembered that the first Canadian TSA was conceived and developed several years before the development of the TSA:RMF (2001), moreover the primary client for the research and development work leading to the Canadian TSA as well as its subsequent ongoing production was the Canadian Tourism Commission, a government mandated national tourism marketing organization, with an interest in revealing overall employment effects of tourism promotion.

As described earlier in this case study, later, in response to the specified additional needs of the Canadian Tourism Human Resource Council, further research and development led to the creation and production of demographic profiles of *persons working in tourism industries and selected*

*characteristics of their work.*

As also described in this study, later still, in response to the further evolution and specification of the requirements of the Council for human resource information pertaining to Canadian tourism industries and their workforce, Statistics Canada developed, in partnership with the CTC, the Human Resource Module of the CTSA, an employment and labour account extension of the Canadian TSA, and with it specification and compilation of a portfolio of volumes, values and characteristics data relating to *all jobs in tourism industries*.

Currently, as demonstrated in this study, the evolved combination of the Canadian System of Tourism Statistics and the Canadian Tourism Labour Market Information System is capable of compiling and producing statistical measures for all of the potential employment concepts identified in the current international standards.

## **9. Recent further advances beyond the TSA**

The initial sections of this case study, presented an overview of the various components of the Canadian Tourism Labour Market Information System (TLMIS), (see Figure 3) that have been developed as either extensions of the TSA or applications derived from it. One of these most recent extensions, is featured here, a new time series of Quarterly Estimates of the HRM key that was released in March, 2013. Another new advance also featured in this section is a combined extension and new application, the Tourism Labour Outlook Models, which have been developed by CTHRC and the Canadian Tourism Research Institute (CTRI) of the Conference Board of Canada to provide a dynamic future perspective to the employment aspects of Canadian tourism industries.

### **9.1 Time series of quarterly estimates of total employment in tourism**

As mentioned above on March 25, 2013 Statistics Canada, in partnership with CTHRC, released its latest innovative new tourism labour market information product – Quarterly Estimates of the key aggregates of the Human Resource Module of the Tourism Satellite Account. One the first major enhancements to the TSA, the National Tourism Indicators (NTI) were developed by Canada to overcome the problems of timeliness and relevance of the detailed new information revealed as outputs of the TSA. The innovation of the NTI involved a shift from the static statistical portrait provided by the TSA to a more dynamic view of tourism—a time series of multiple snapshots. To accomplish this, Statistics Canada conceived and developed the quarterly and annual Indicators, the NTI, measuring some 24 key aggregates representing trends in the main economic aspects of tourism, on a continuous quarterly basis, thereby tracking the evolution of tourism related economic activity. The NTI also included several measures of *tourism employment* (i.e., employment generated by tourism demand) across all tourism industries.

The NTI became the first extension developed for the CTSA, and for industry and labour market analysts they are still one of the most important of the array of supplementary extensions and analysis tools that have been added to the Canadian TSA. This is because the NTI provide the key prerequisite for many other kinds of industry and labour market analysis – a consistent time series

of TSA-related and TSA-benchmarked data. The major contribution of the NTI to tourism industry and market research and analysis is the continuous production of a current and timely overview of the evolution of tourism market demand and supply, production and employment in Canada.

The new Quarterly Estimates of the HRM are an extension of the annual estimates of the HRM. These quarterly time series estimates are consistent with the annual HRM benchmarks, so at the annual level, both sets of data are equal. The estimates provide quarterly information on employment related to tourism in Canada, specifically information on labour compensation, jobs and hours worked in tourism industries. The newly released quarterly time series currently dates from 1997Q1 to 2012Q4 (Statistics Canada, 2013b).

### 9.1.1 Key variables of the quarterly HRM

The definitions of the key variables (jobs, hours worked and compensation) are those in the annual HRM which, in turn, are based on the concepts of the Canadian Labour Productivity Accounts. Information on the annual HRM accounting framework, concepts and definitions, data sources and methodology can be found in the appendices of the latest issue of the 2012 annual HRM (Statistics Canada, 2013b:1).<sup>88</sup>

*Total employment in an industry* is the number of all employee and self-employment jobs in that industry. The hours are tabulated by adding the actual hours worked during normal periods of work, including overtime but excluding paid leave such as paid holidays and sick leave. And finally, *compensation* is the total earnings of employees consisting of wages and salaries as well as supplementary labour income such as employer's contribution to pension funds plus labour components of self-employment income (Statistics Canada, 2013b:1).

Several calculated variables such as average annual hours worked, average annual compensation, average hourly compensation, average weekly compensation and average weekly hours can also be used to facilitate the analysis of the tourism labour market (Statistics Canada, 2013b:1).

### 9.1.2 Tourism industries in the quarterly HRM

The estimates for the key variables are derived for 6 tourism industries. Aggregate industries are also derived. The list of industries for which quarterly estimates of jobs, hours and compensation generated by tourism are presented includes:

- Transportation
- Air transportation
- Other transportation
- Accommodation
- Food and beverage services
- Recreation and entertainment
- Travel services (Statistics Canada, 2013b:1).

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<sup>88</sup> See <http://www.statcan.gc.ca/pub/13-604-m/2012070/app-ann-eng.htm>.

### 9.1.3 Distribution of annual data into quarterly time-series

A quadratic minimization program is used to produce quarterly data for the key variables. The program is used for the process of optimally combining the two sources of information (annual benchmarks and distribution series), to achieve improved and consistent estimates of the variable. The benchmark series are annual data from the HRM, and the distributor series are employment data from the Survey of Employment, Payrolls and Hours (SEPH). SEPH data are also used to estimate current year quarterly data of the HRM, for which annual data are not available (Statistics Canada, 2013b:2).

For non-seasonally adjusted time-series, SEPH data on the number of jobs, hours worked and compensation are used as distributors. Seasonally adjusted SEPH data are used to distribute HRM data into seasonally adjusted time-series. However, seasonally adjusted SEPH data on hours worked are unavailable at the level of detail required. As such, seasonally adjusted SEPH data on compensation used to distribute both hours worked and compensation into seasonally adjusted time-series (Statistics Canada, 2013b:2)

**Table 16: Total jobs, hours worked and labour compensation<sup>1</sup> in tourism industries, 2011 QIV to 2012, QIV, seasonally adjusted data at quarterly rates**

	2011 IV	2012 I	2012 II	2012 III	2012 IV	Percent change
<b>Total jobs</b>	Thousands of jobs					%
Transportation	219.9	218.0	221.3	227.1	228.5	0.6
Air transportation	45.8	45.4	45.9	47.8	48.7	1.9
Other transportation	174.2	172.6	175.4	179.3	179.8	0.3
Accommodation	233.0	232.0	231.6	233.8	237.7	1.7
Food and beverage services	906.1	910.0	925.5	931.9	936.9	0.3
Recreation and Entertainment	276.8	280.1	281.7	278.4	276.9	-0.5
Travel services	45.7	45.9	45.2	45.8	44.8	-2.4
Total tourism industries	1681.4	1686.0	1705.3	1717.0	1722.8	0.3
<b>Total hours worked</b>	Hours worked (millions)					%
Transportation	96.6	94.0	95.2	102.6	100.4	-2.2
Air transportation	18.7	18.1	18.2	21.0	21.9	4.4
Other transportation	77.9	76.0	77.0	81.7	78.5	-3.8
Accommodation	94.5	94.2	94.4	98.7	100.0	1.3
Food and beverage services	315.3	310.2	328.8	341.4	335.0	-1.9
Recreation and Entertainment	101.9	103.6	100.8	104.9	103.9	-0.9
Travel services	21.3	22.4	20.8	20.9	19.1	-8.3
Total tourism industries	629.7	624.5	639.9	668.5	658.5	-1.5
<b>Labour Compensation</b>	Millions of dollars					%
Transportation	2437.0	2374.8	2406.8	2611.6	2570.5	-1.6
Air transportation	634.0	610.6	613.2	706.7	737.3	4.3
Other transportation	1803.0	1764.2	1793.6	1904.9	1833.3	-3.8
Accommodation	1684.0	1676.7	1679.4	1755.5	1778.3	1.3
Food and beverage services	4390.9	4290.5	4523.3	4680.1	4584.6	-2.0
Recreation and Entertainment	2242.5	2266.3	2194.3	2277.9	2253.5	-1.1
Travel services	465.9	484.6	444.4	444.3	406.5	-8.5
Total tourism industries	11220.3	11092.9	11248.2	11769.4	11593.5	-1.5

Source: Excerpt from Statistics Canada, Quarterly HRM Data (1997-2012). Unpublished Excel Tables 4, 5, and 6.

Release date: March 25, 2013, Ottawa: Statistics Canada, 2013c.

<sup>1</sup>Labour compensation refers to aggregate compensation in \$millions for the quarter.

#### 9.1.4 Results and findings

The most recent results of the new Quarterly HRM Estimates shown in Table 16 reveal, for the first time quarterly data for the tourism sector on *total jobs in tourism industries, total hours worked and labour compensation* covering the period from 2011 QIV to 2012, QIV. Readers should note that the growth rates of employment in tourism industries portrayed in Table 15 are adjusted for seasonal variations. Associated percentage changes are presented at quarterly rates unless otherwise noted (Statistics Canada, 2013b:2).

Highlights of observations from Table 16 for the fourth quarter of 2012 include the following:

- Employment (total number of jobs) in tourism industries increased slightly (0.3%) in the fourth quarter, of 2012, with all but travel services (-2.4%) and recreation and entertainment

(-0.5%), posting job gains. The largest job gains were posted in the air transportation (1.9%) and accommodation (1.7%) industry groups.

- Hours worked in tourism industries were down 1.5%, as was compensation by the same amount, (-1.5%).
- Aggregate hours worked decreased overall, led by a decline of 8.5% in the travel services industry, followed by other transportation (-3.8%), food beverage services (-1.9%) and the recreation and entertainment industry group (-0.9%). At the same time, however, increases in total hours worked were observed in the air transportation (4.4%) and accommodation (1.3%) industries for the same [period].
- Labour compensation increased 4.3% in the air transportation industry and 1.3% in the accommodation industry, while it declined 8.5% in the travel services industry and also declined 3.8% in the other transportation industry group. Labour compensation also declined by lesser amounts in the food and beverage services and recreation and entertainment industry groups.

## **9.2 Labour Outlook Models, forecasts and policy scenarios for tourism industries**

Once again, the development of a set the Tourism Labour Outlook Models was based on and informed by the development of the TSA and its later HRM extension. The research and development of this specific TLMIS component involved the successful completion of four steps:

- 1) Modelling potential labour demand of tourism industries for specific tourism occupations;
- 2) Modelling potential tourism labour supply by specific tourism occupations;
- 3) Modelling the market adjustment process reconciling tourism labour demand with supply; and,
- 4) Industry user stakeholder refinement and endorsement.

The data sources and methodology for each step is briefly described in general terms in the following sections.

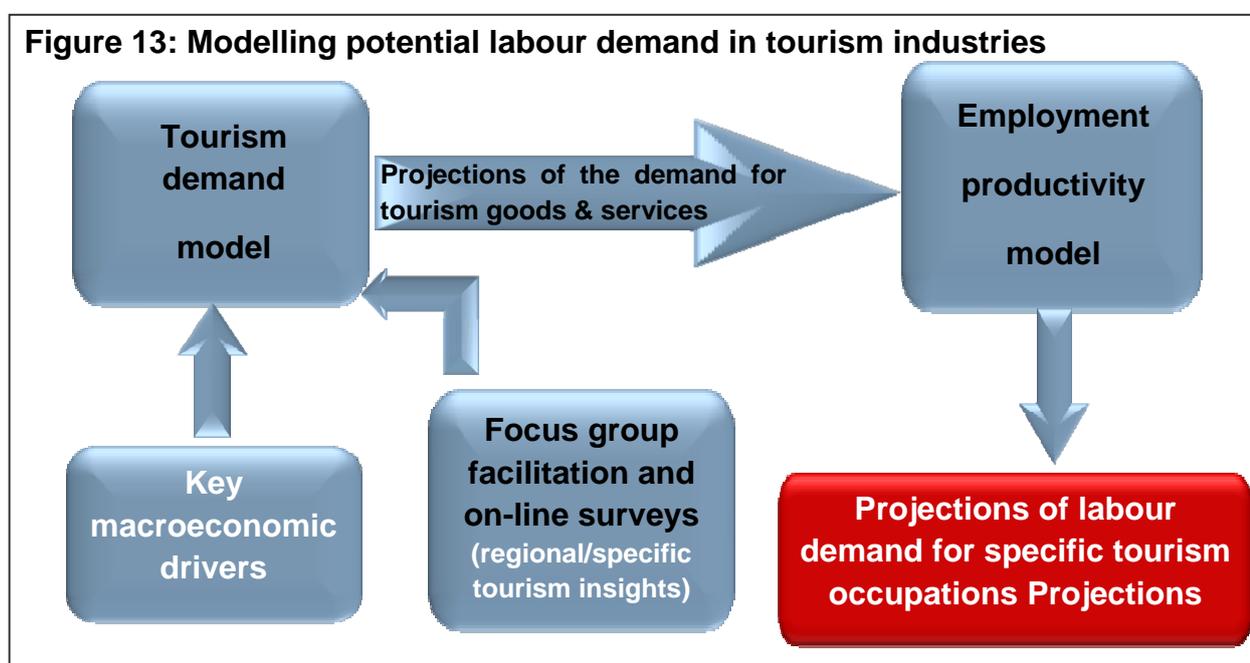
### **9.2.1 Modelling potential labour demand of tourism industries for specific occupations**

The methodology developed to forecast labour demand in tourism industries is somewhat different than traditional forecasting models of labour demand (used for industries where people tend to have long careers in the same occupation and industry) which estimate the additional demand for labour based on the growth of the industry (expansion demand) and then add to this the demand of labour stemming from people retiring (replacement demand).

Instead, the approach developed for forecasting labour demand of tourism industries takes into account the particular special characteristics of most jobs in the Canadian tourism industries described earlier in this case study as well as other factors not discussed herein pertaining to particular aspects of the labour market for tourism industries in Canada. Namely, most jobs are:

- often seasonal and filled by younger people;
- often carried out on a part-time basis;
- often have lower skill requirements;
- often display significant mobility into and out of tourism industries; and,
- often display substantial movement between jobs and occupations within individual tourism industries and between industries within the sector.<sup>89</sup>

As a result, instead of combining estimates of expansion demand and replacement demand derived separately, a customized tourism-specific modelling approach was developed that applies tourism-specific productivity trend assumptions to forecasts of the potential demand for tourism goods and services (tourism commodities), which provides a forecast of the total number of jobs required to fulfill that demand, thereby eliminating the need to forecast expansion demand and replacement demand separately, (Figure 13), (CTRI, 2012).<sup>90</sup>



Source: Adapted from Canadian Tourism Research Institute, Conference Board of Canada, 2012.

### 9.2.2 Modelling potential tourism labour supply for specific occupations

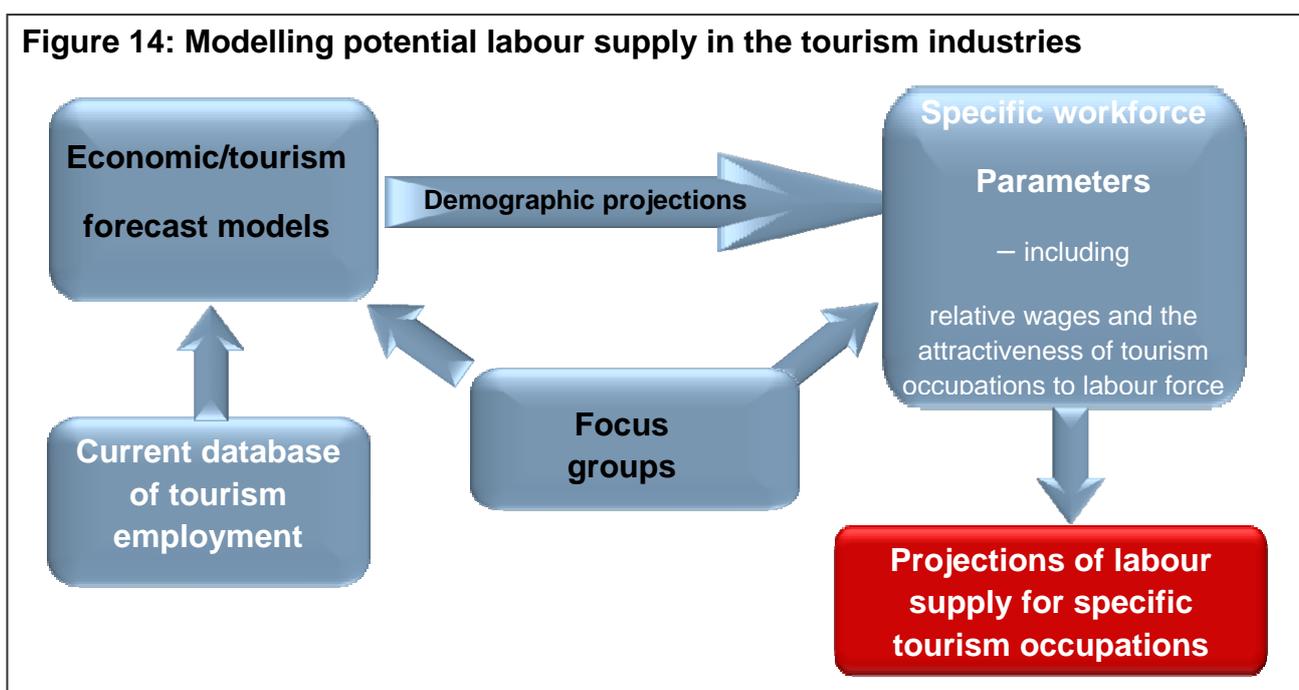
Developing a forecast of potential labour supply for tourism industries entailed two basic components: 1) a forecast of the population and labour force, and 2) an estimation of the likelihood of a particular person working in the tourism industries. Forecasting the supply the supply of labour

<sup>89</sup> Further study and model refinements are still required to determine and adjust for the extent to which people change jobs and occupations within the tourism industries and the degree of upward mobility within industries in the sector.

<sup>90</sup> See CTRI, 2012, pp. 58-74 for more specific methodological details in forecasting labour demand for tourism industries.

is based on time series data provided by the HRM described in earlier sections of the case study, plus a long-term forecast of the Canadian population (from Statistics Canada), as well as demographic and labour force projections for Canada produced by the Conference Board of Canada. In addition to providing employment data by industry and occupation, the HRM also includes detailed data on age, sex, and immigrant status by occupation and industry. Using this detailed data, a *tourism occupation penetration rate*—defined as the percentage of people working in a specific tourism occupation—was calculated for key personal characteristics: age, sex, and immigrant status (CTRI, 2012).

Since the HRM only publishes data for Canada as a whole, penetration rates by province and metropolitan area were imputed by first calculating the Canadian shares of each occupation by age, sex, and immigrant status relative to the total for the industry in which the occupation appears. These relative shares were then applied to the total employment by industry group in each province and metropolitan area. The resulting employment figures by age, sex, immigration status, at the province level were then constrained to the corresponding national and provincial aggregates to ensure an internally consistent system (CTRI, 2012).<sup>91</sup>



Source: Adapted from Canadian Tourism Research Institute, Conference Board of Canada, 2012

<sup>91</sup> See CTRI, 2012, pp. 58-74 for more specific methodological details in forecasting labour supply for tourism industries.

### 9.2.3 Modelling the market adjustment process reconciling tourism labour demand with supply

The combination of potential demand and supply of labour in the tourism sector provides an outline of how employment may ultimately progress. The gap between the demand and the supply of labour also provides a useful guide when discussing potential labour shortages facing the Canadian tourism sector over the next 15-20 years. In practice, however, the market adjusts at some point to eliminate the discrepancy between the demand and the supply for labour. To account for this, the Canadian tourism labour market forecasting research first identified industry sectors and occupations where significant discrepancies exist. Then, the adjustment process that takes place between labour supply and demand was modelled to eliminate some of those discrepancies (CTRI, 2012: 58-74).

This process refined the potential labour demand and supply projections and generated a forecast of what the equilibrium level of employment is expected to be within the tourism sector. Thus, by comparing the results of the forecast for equilibrium employment with the potential labour demand, the lost employment and output associated with the initial labour shortage was assessed (CTRI, 2012: 58-74).

The market adjustment process for labour demand and labour supply depends on several key determinants of elasticity. On the supply side, the adjustment process was modelled using only changes in real wages. While other factors such as benefits, time off, and work environment also play a role in practice from both the firm's perspective and the employee's perspective, in principle, these can be assigned a monetary value and thus translated into a composite wage. Unfortunately, very little literature exists on the elasticity of supply with respect to wages on a tourism industry basis or for the occupations in the tourism industries (CTRI, 2012: 58-74).

As a result, the elasticity of labour supply was estimated using a number of structural equation specifications for tourism industries a whole, as well as for the food and beverage services industry group and the accommodation industry group in particular.

Using the parameters for the elasticity of labour supply and demand estimated on a tourism industry basis for Canada and then applying them to each province, the model was solved for each occupation in each province to arrive at an equilibrium level of employment where there is no excess labour demand and no excess labour supply in each province and industry.<sup>92</sup> The equilibrium results were then aggregated to their corresponding industries and for Canada as a whole (CTRI, 2012: 58-74).

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<sup>92</sup> Some occupations, such as cooks, appear in more than one industry category. In those cases, the market adjustment processes were modeled separately for each industry to maintain each industry's individual cost structures, and to account for the differences in elasticity of supply and demand for each industry.

Industry-specific and regionally stratified stakeholder surveys and focus groups within the tourism sector were also used to refine national and regional assumptions and associated estimates of current industry and labour market situations, and driving conditions. These results were further supplemented by industry stakeholder feedback and consultation processes which were used to identify needed adjustments and refinements, as well as ratification and endorsement of the output results emerging from the modelling and estimation processes (CTRI, 2012: 58-74).

#### 9.2.4 Results of forecasting and policy scenario analyses, 2010

In March 2012, CTHRC released an updated version of its latest forecasts and policy scenarios of the labour market situation and outlook for the Canadian tourism industries (See CTRI, 2012) entitled *The Future of Canada's Tourism Sector – 2012 Update*, based on its portfolio of forecasting models as well as the multiple data sources derived from both the official Canadian statistical system and the TLMIS developed by CTHRC and its partners.

The main finding of this study is that Canada's tourism industries are facing a potentially severe shortage of labour over the next 15 years. Despite a short-term reprieve due to weak economic conditions during the economic recession of 2008-09, the latest update of the study shows that as demand for labour grows, the pool of available workers will have an increasingly difficult time keeping up. Canada's population is aging, causing a significant deceleration in labour force growth over the long term.

The consequences of labour shortages—such as missed opportunities for investment in Canadian tourism industries, and the inability to meet potential demand—could cost Canadian tourism businesses billions of dollars. More precisely, the latest update of the study found that:

- “Similar to many other sectors of the Canadian economy, tourism suffered from the effects of tighter labour markets in the years leading up to the economic recession of 2008–09.
- Since then, weak economic conditions have provided a temporary reprieve, but the study's latest projections suggest tourism labour shortages will re-emerge and worsen progressively over the next 15 years (CTRI, 2012).
- By 2025, the sector's supply of labour could fall short of potential demand by an estimated 219,000 jobs, leaving 10.3 per cent of potential labour demand unfilled (see Table 16).
- The food and beverage services industry is forecast to suffer the largest labour shortage among all tourism industries by far, although shortages are also projected for the recreation and entertainment, transportation, and accommodation industries.
- Only travel services, an industry adapting to new technologies and changing consumer needs, is expected to avoid significant shortages.
- Thus, it comes as no surprise that jobs in food and beverage services—such as food-counter attendants, servers, cooks and bartenders—will experience the greatest labour shortages among occupations in tourism industries (see Table 17).

- Projections for potential labour shortages in the tourism industries by province and city regions indicate that the shortages are unequally distributed at the provincial and sub-provincial levels. The province with the largest employment in tourism industries in Canada, Ontario, will experience the most significant shortage, but other provinces that depend heavily on tourism such as Quebec, British Columbia and Alberta will also experience substantial labour shortages (CTRI, 2012: i-ii).

**Table 17: Potential labour shortage in Canadian tourism industries (jobs)**

	<b>2007</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>
<b><i>Transportation</i></b>	4,691	-2,647	8,173	14,105	22,104
Air transportation	1,444	-1,719	1,287	3,735	7,510
Rail transportation	140	-48	355	476	684
Other transportation	3,107	-879	6,531	9,894	13,910
<b><i>Accommodation</i></b>	4,193	-4,041	9,353	14,568	22,225
<b><i>Food and beverage services</i></b>	9,665	-12,708	35,029	91,456	142,307
<b><i>Recreation and entertainment</i></b>	4,879	-4,385	10,868	24,746	31,999
<b><i>Travel services</i></b>	341	-995	715	511	186
<b><i>TOTAL LABOUR SHORTAGE</i></b>	<b>23,769</b>	<b>-24,776</b>	<b>64,139</b>	<b>145,387</b>	<b>218,821</b>

Source: Canadian Tourism Research Institute Conference Board of Canada, 2012.

The study also tested the potential impacts on future employment trends of various external market shocks such as rising oil prices and internal policy changes, such as a change in immigration policies to enable increased numbers of temporary and permanent foreign workers in the tourism sector; or alternatively, increased use of underutilized labour pools such as aboriginal workers, people with disabilities and seniors.

**Table 18: Potential major occupation-specific labour shortages in Canadian tourism industries (jobs)**

	2007	2010	2015	2020	2025
Food-counter attendants & kitchen helpers	2,894	-3,579	13,120	33,478	49,564
Food and Beverage Servers	2,468	-2,778	11,928	27,782	42,655
Cooks	1,617	-2,252	3,528	10,497	16,791
Bartenders	463	-342	2,478	5,606	8,784
Program leaders & instructors in recreation & sport	757	-834	2,529	5,789	7,779

Source: Canadian Tourism Research Institute, Conference Board of Canada, 2012.

### 9.3 Further areas of research and development

As reported earlier in the initial overview discussion of the Canadian Tourism Labour Market Information System, other new areas research and development on employment aspects of the tourism industries are still current works in progress. These include: (i) final production of a new Provincial-Territorial dimension to the Human Resource Module; and (ii) development of measures of *tourism labour productivity*, and background research into associated driving factors that could contribute to improvements in labour productivity within Canadian tourism industries.

## 10. Conclusions

More than twenty-five years have passed since the TSA concept was first proposed in Canada. At the time, it was to address real and perceived problems of credibility, comprehensiveness and coherence in tourism statistics, including statistics and information on employment in tourism industries. Since then, the UNWTO and the ILO have successfully developed, promoted, promulgated and updated the IRTS and TSA-RMF as new international standards to be emulated in improving national tourism statistics in general, and statistics on employment in tourism industries in particular.

Recently, significant research and development progress has been made by the ILO and WTO working in partnership to expand the coverage of statistics on employment in tourism industries, as well as information on conditions in the work environment in tourism industries. At the national level, parallel research and development activities in exploring extensions, refinements and applications of statistics on employment in tourism industries have been initiated and implemented by a few countries with already advanced established systems of tourism statistics such as Canada.

The ILO and UNWTO selected Canada for this country case study, as a country that has developed one of the best and most comprehensive set of procedures for measuring employment in the

tourism industries both within the framework of the TSA (Table 7) as well as beyond the TSA. The main focus of the case study presented herein has been a broad and in-depth review of the ways that Canada has applied and extended the concepts and methodologies of the TSA as well as the other concepts and measures of employment in tourism industries outlined in the latest international recommendations in the field of tourism statistics (IRTS, 2008), to produce new sets of data on employment in the tourism industries beyond the TSA. Another objective of this review has been to provide a comprehensive and detailed description of Canada's methodologies for measuring aspects of tourism related employment, particularly in terms the persons employed in tourism industries and their personal and work characteristics, rather than just in terms of jobs.

This study has demonstrated that Canada has a fully developed set of statistical procedures, associated information products and derivative applications for measuring and analyzing many related aspects of employment in tourism industries. This review has covered and demonstrated Canada's capacities to produce statistical results for all of the personal social and work characteristics specified by the ILO for inclusion in this study, namely: personal demographic characteristics such as employment status, type of work, gender, occupation, place of birth, mother tongue, educational attainment, membership in equity groups; as well as, personal work characteristics including union status, duration and hours of work, seasonality of work, and salaries and wages.

This Canadian case study describes the many data sources and methodologies used to obtain data and derive useful information on employment in tourism industries and the characteristics of workers in the Canadian tourism sector. In addition to highlighting the methodologies used to produce this information, the study also provides illustrative results and interpretations of their significance relative to points of comparison within the tourism sector and the overall Canadian work force.

One of the important innovations of the Canadian experience illustrated in this case study is the emphasis on secondary analysis of non-tourism-specific data sources in the national statistics system such as the national Business Register, the Census and the Labour Force Survey, as an approach to generating relevant information beyond jobs and labour income on the characteristics of business employment, persons working in tourism industries and jobs in tourism industries. The Canadian practices of using the Tourism Satellite Account as a conceptual framework from which to develop table specifications for compiling custom tabulations of Census data and Labour Force Survey data of relevance to describing persons and jobs in tourism industries are described in detail in the foregoing review. This particular innovation extends the tourism macroeconomic analysis and time series capabilities of the TSA and its off-shoots to more micro-tourism analyses through linkages with other micro-dataset such as the Census and LFS.

It is noteworthy that it was this innovative measurement approach that enabled Canada to produce its first demographic profile of workers in tourism industries even before completion of the full research and development for the first prototype version of the Canadian TSA.

The second major innovation of the Canadian experience illustrated in this study is the development of the Human Resource Module extension of the Tourism Satellite Account. This new employment

and labour accounting analytical statistical instrument provides a synthesis of volumetric, value and characteristics data for all jobs in tourism industries, selected characteristics of those jobs, plus selected characteristics of employees in Canadian tourism industries. It also provides timely, ongoing time series and linkage to SNA macroeconomic statistics. Most importantly, as demonstrated in this review, the HRM bridges the two fundamentally different employment measurement perspectives identified earlier—“employment in tourism industries” and “tourism employment”. The aim and accomplishment of the of the Human Resource Module (HRM) is to provide timely and reliable statistics on a broad range of human resource dimensions of tourism with a higher degree of integration, coherence and consistency than the less-integrated approaches developed earlier.

As illustrated through specific results presented in this review, the HRM provides a snapshot of the tourism industries and their associated occupations as well as insights into trends over time. This case study review has shown how measures of key statistics such as jobs, hours worked and employment earnings can be used to produce further derived statistical outputs including average hourly earnings and average annual hours worked per job. Moreover, as seen in further illustrations, both basic and derivative key variables can also be analyzed in terms of selected personal characteristics of workers employed in tourism industries such as age and immigrant status.

This case study has demonstrated how the Canadian tourism statisticians and analysts have linked the multiple data assets developed on employment in tourism industries with further research and development to derive a portfolio of technical forecasting instruments, thereby generating dynamic forward looking views of the outlook for employment, employees and employers in Canadian tourism industries.

As further shown through the results, findings and interpretations presented here, the many tools and data sources developed with the Canadian Tourism Labour Market Information System have provided industry policy makers and decision makers with an unparalleled wealth of information, knowledge and insights on the employment aspects of tourism industries in Canada. While the most visible impact of this information has been the recognition and inclusion of the importance of skills and labour as a new strategic focus in the recent 2011 Federal Tourism Strategy; at a day-to-day level, the new knowledge and insights inform the ongoing norm referencing work of the Council in developing tourism-specific occupational standards and training courses.

The illustrative results and interpretation presented in the study show that the employment effects of tourism are relatively significant in the Canadian economy. Some of the plethora of noteworthy observations about persons working in the tourism industries in Canada and employment in tourism industries reported in the review include those that follow.

- Over 10% of Canada’s workforce is employed in the Canadian tourism industries including disproportionately larger shares of women, youth, less educated persons, and immigrants than in the overall economy.

- In 2012, employment in the tourism industries provided 1.7 million jobs, or 9.4% of all jobs in Canada, and grew by 1.5%, outpacing job growth in the total economy (+1.0%).
- Tourism employment in tourism industries (jobs directly supported by visitor consumption), totalled 496,000, up 1.4% from the previous year, but less than the growth rate for all jobs in tourism industries, indicating slightly higher growth in jobs supported by local consumption.
- Tourism employment in the overall economy directly supported 603,400 jobs, with 18% or 107,400 jobs, occurring in non-tourism industries.
- For a fully developed, complex economy like Canada's, the reported employment effects of tourism are relatively large in comparison with the observed economic contributions of tourism to Canada's GDP of 1.9% in 2012.
- At the time of the last Canadian Census (2006), the food and beverage services industry group accounted for the largest proportion (48%) of persons employed in the tourism industries, followed by recreation and entertainment (22%), transportation (16%), accommodation (11%), and lastly travel service (3%).
- Census data reveals that two of the most populous provinces, Ontario and Quebec, account for the largest shares of persons employed in the tourism industries, together making up about 50% of all persons employed in the tourism industries in Canada.
- Persons working in the tourism industries are significantly younger than the Canadian work force overall, and were twice as likely to be aged 15 to 24 years old than the overall workforce.
- Persons working in the tourism industries are repeatedly found to be heterogeneous in their social characteristics. This finding applies for most social characteristics including gender, age, school attendance, education, mother tongue, place of birth, and equity group membership.
- The food and beverage services industry group employed the youngest work force and the accommodation and recreation and entertainment industries, for most occupations, also employed a higher percentage of young people than the Canadian labour force as a whole. The transportation and travel services industry group, on the other hand, employed fewer younger persons. Transportation in particular was dominated by older workers, being the only tourism industry group to have the majority of its workers aged 45 and older.
- Consistent with the youthful age of workers in the tourism industries, a relatively high proportion of persons working in the Canadian tourism industries were also attending school at same time, and have lower levels of education when compared to workers in the overall economy.
- The occupations of persons employed in the tourism industries are dispersed across a wide range of specific occupations. The three most common occupations are all found in the food and beverage services and accommodation industry groups; namely food counter

attendants, kitchen helpers and related occupations, food and beverage servers and cooks. Persons working in these three occupational groups comprise almost a third of all persons employed in the tourism industries. These three plus the seven other top ten occupational groups -- restaurant and food service managers, bus drivers and subway and other transit operators, cashiers, light duty cleaners, program leaders and instructors in recreation, sport and fitness, taxi and limousine drivers and chauffeurs and bartenders -- make up a little more than half of all persons employed in Canadian tourism industries. The rest are distributed thinly across a wide range of other occupations.

- Secondary analysis of recent Canadian Labour Force Survey data reveals that in 2012, as well as the preceding four years after the advent of the global financial crisis and associated recession, the labour force of tourism industries is faring better than the overall economy with a sector specific annual average unemployment rate of 6.4% for 2012 compared with the national economy wide average of 7.2%.
- The unemployment rates for workers in the respective tourism industry groups differ widely from a high of 8.9% for the accommodation industries group to a low of 3.6% for the transportation industries group.
- The majority of persons working in the tourism industries work for others as employees, resulting in a lower level of self-employment than in the overall economy in 2012. Self-employment was highest in the recreation and entertainment industry group and lowest in the food and beverage services industry group.
- Part-time work is highly prevalent among persons working in the tourism industries with more than a third of workers employed on a part-time basis. This is particularly true among workers in the food and beverage services industry group (47%).
- More than six in ten tourism employees work full-time, which is substantially less than the overall economy (81%). The highest levels of full-time employment are found among workers in the travel services industry group (85%).
- More than half (52%) of people working in the Canadian tourism industries are working on a seasonal (part-year) basis, compared with 38% in the overall economy.
- There are large differences in seasonal work patterns across tourism industries, with higher rates of seasonal work among persons working in the recreation and entertainment, food and beverage services and accommodation industry group; while slightly less than four of ten persons working in the travel services industry and transportation industry work on a seasonal (part-year) basis.
- The proportion of unionized workers observed in tourism industries, at 14%, is slightly more than half the 25% share observed in the Canadian labour force overall. This varies across industry groups, with the greatest proportions of union membership and coverage found among persons working in the transportation industry group. Union membership and coverage are least common among persons in the food and beverages services and travel services industry groups.

- The 2012 Human Resource Module reveals that the food and beverages services industry group is the largest employer among the Canadian tourism industries in 2012, with more than half (53%) of all tourism jobs at 915,000 jobs; followed by recreation and entertainment at 16.7% with 275,000 jobs; then thirdly, accommodation at 13.9% with 230,000 jobs. The transportation industry group at 222,000 jobs (13.1%) was the fourth largest employer, while the travel services industry group was last with just 44,000 jobs (2.7%).
- Five occupations predominate in the tourism industries, accounting for approximately half of all employee jobs: food-counter attendants, kitchen helpers and related occupations, food and beverage servers, cooks, cashiers and restaurant and food service managers. Furthermore, nine out of ten of the top occupations in the Canadian tourism industries are concentrated in the food and beverage services industries.
- Different main occupations predominate each industry group within the tourism industries: food-counter attendants, kitchen helpers and related occupations (260,000 jobs) are the main occupations in the food and beverage services industry; light duty cleaners (47,000 jobs) for the accommodation industry group; program leaders and instructors in recreation, sport and fitness (39,000 jobs) in the recreation and entertainment industry group; travel counselors (18,000 jobs) in the travel services industry group; airline sales and service agents (11,000 jobs) in the air transportation industry group; and bus drivers and subway and other transit operators (52,000 jobs) in the other transportation industry group.
- Working hours are shorter for jobs in the tourism industries compared to jobs economy-wide in Canada, an average of 29.1 hours per week in 2012, compared to 32.9 hours. The shorter work week reflects the higher proportion of part-time jobs found in tourism industries.
- The reported work week of jobs in the food and beverage services industry group, at 27.3 hours, is the shortest among all the tourism industries, and well below the Canadian average of 32.9 hours in 2012. This observed gap is largely due to the fact that food and beverage services also have the highest share of part-time jobs among tourism industries. The travel services industry group, with the highest proportion of full-time jobs among the tourism industries, also has the longest work week, at 35.3 hours in 2012.
- Hourly compensation in the Canadian tourism industries is reported to average \$20.10 in 2012, up 1.1% from the previous year, but still much lower than the hourly compensation economy-wide of \$31.86.
- There is a noteworthy gap in hourly compensation reported between full-time workers and part-time workers in tourism industries. In 2012, hourly compensation for full-time workers in the tourism industries was \$21.30 CAD while part-time workers received \$15.62 CAD.
- Within tourism industries, jobs in food and beverage service industries pay the least, with an average hourly compensation well below the averages for all tourism industries and economy-wide.

- The best paying jobs in tourism industries are found in the transportation industry group, with reported hourly compensation of \$29.88, well above the average across all jobs in the tourism industries. Hourly compensation was particularly high in air transportation.
- Jobs in the food and beverage services industry group pay the least in terms of annual pay. They also involve the fewest working hours per week and the lowest hourly rate of pay in the tourism industries. The transportation industry group, by contrast, is the only industry group with an annual compensation approaching the national overall average. The long work week and the high hourly compensation rates in both air and other transportation contribute to these differences.
- Youth aged 15 to 24 are a major source of labour for the tourism industries, accounting for a third (598,000) of all employee jobs within the sector. The most common occupations among youth were food counter attendants, kitchen helpers and related occupations with two out of every three such jobs being held by a young worker in 2012.
- Older workers, aged 45 years or older, are also an important source of labour for tourism industries, holding 29% of all employee jobs (463,000 jobs) in 2012. Generally, older workers are employed more evenly across all the tourism industries compared to young adults. However, one tourism industry group, transportation industries other than air, employs a notably older workforce, with older workers accounting for 64% of all employee jobs. Air transportation, with 45% of all employee jobs held by persons aged 45 years or older, is the employer with the next largest proportion of its workforce being over 45 years of age.
- Immigrants are another important source of labour for the Canadian tourism industries, accounting for 22% of all employee jobs in the tourism industries (354,000 thousand jobs) in 2012.
- Total employment in the tourism industries in Canada in 2012 is currently expanding, with all but travel services and recreation and entertainment posting job gains.
- Looking forward, given current trends and forecasts in tourism demand and labour, based on Canada's tourism-specific labour forecasting models, Canada's tourism industries are facing a potentially severe shortage of labour over the next 15 years. The consequences of which—such as the inability to meet potential demand—could cost Canadian tourism businesses billions of dollars.

In October 2011, due in large part to the emerging concerns regarding future skills gaps and labour shortages within the Canadian tourism sector, supported by comprehensive information on aspects of employment in the tourism industries developed by CTHRC and Statistics Canada, the Canadian government formally and explicitly recognized the importance of skills and labour as one of the four pillars of the 2011 Federal Tourism Strategy (Industry Canada, 2012). The strategy specifies *“Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality”* as a priority focus of current and future tourism-specific government policy initiatives.

## **11. Recommendations**

### **11.1 Other countries**

As mentioned in the introduction, one of the intended objectives of this review of the Canadian experience in measuring employment in tourism industries is to assist others to broaden the geographical coverage of statistics on employment in tourism industries and to improve their capacities to produce more readily available, consistent, and comparable information on employment in the tourism industries beyond those measures specified in the TSA.

This final section of the study presents some recommendations to other countries, and also to ILO and UNWTO, based on the Canadian advances, findings and experiences in measuring employment aspects of tourism industries, and tourism development in general. These recommendations are directed to other tourism researchers, statisticians, as well as industry stakeholders and policy makers regarding the steps and path to take in developing and improving their national and regional systems of statistics on employment in tourism industries and associated tourism labour market information.

**Figure 15: Development path of statistics and analysis of employment in Canadian tourism industries**

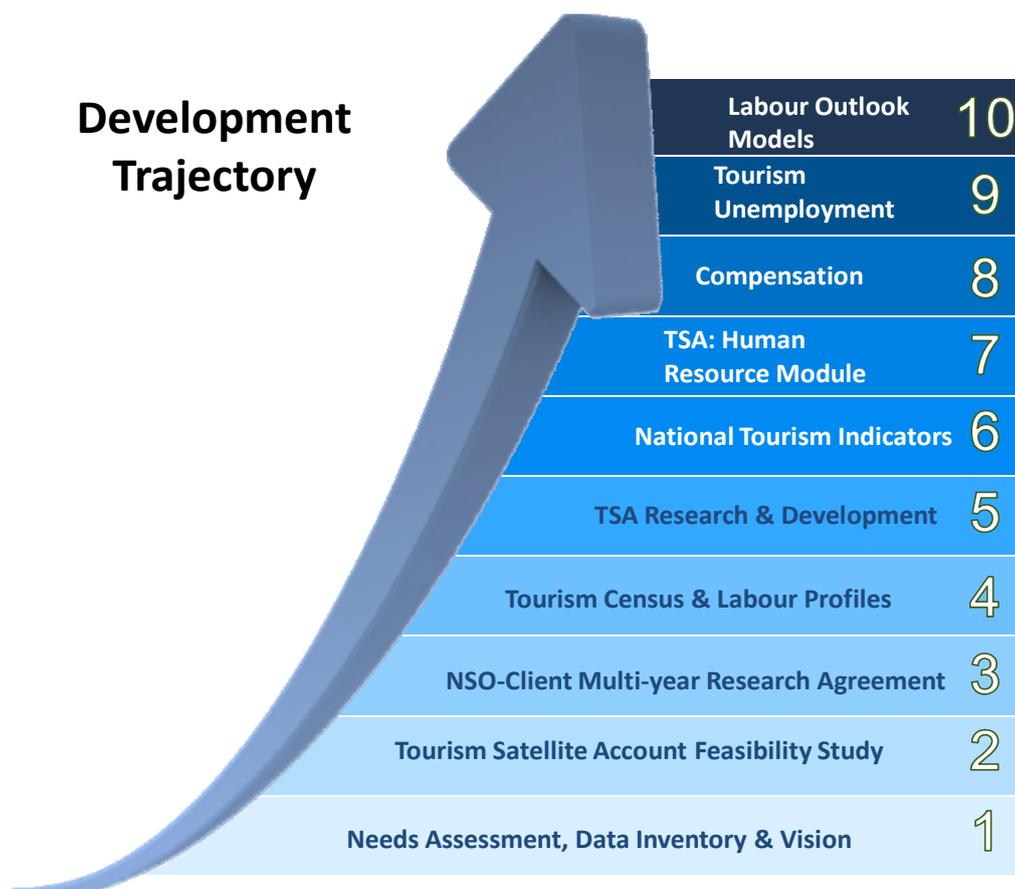


Figure 15 illustrates the development path and sequence of steps implemented by Canada in the course of developing its Tourism Labour Market Information System (TLMIS) described earlier.

Brief descriptions of the recommendations regarding each of the ten identified development stages and, where relevant, some of the choices and options for developers at key decision points of the various stages follow.

### **Step 1: Needs assessment, data inventory and visioning**

First of all, countries thinking about improving the coverage and quality of statistical information on the employment aspect of tourism industries should initially carry out a comprehensive needs assessment with all relevant industry and technical stakeholders. At this initial stage, they should also conduct a comprehensive technical inventory and capacity assessment of the scope of coverage, quality and availability of existing country-specific data and analytical assets and capacities at all levels – national, regional and local. As noted in this study, Canada completed such a comprehensive multi-stakeholder review and assessment of tourism statistics in general, including information on the employment aspects of tourism, as part of the 1985-1987 National Task Force on Tourism Data, under the joint leadership of the then Minister of State for Tourism and the Chief Statistician of Canada (National Task Force on Tourism Data, 1989).

The stakeholder needs and technical capacity assessment processes should also include comprehensive information exchanges and discussions with both tourism and statistical stakeholders by means of stakeholder surveys, town-hall meetings, focus groups and executive/expert interviews to aid in future organization activities and to obtain agreement on objectives, basic methodologies and expected outputs and outcomes. This discussion with stakeholders and the data and information assessment process should be also informed by the direction and guidance provided by ILO and UNWTO in IRTS 2008 and TSA:RMF 2008. UNWTO in particular has provided helpful recent guidelines on the process of carrying out an inventory and review process for the system of tourism statistics in general. Similarly, as also noted in the preface and introduction to this study, ILO and UNWTO are currently working together to develop further technical information and guidance specific to the employment aspects of tourism statistics, including the current and other identified case studies.

At a minimum, based on the demand side and supply side definitions of tourism, the following potential data sources should be examined and assessed for their relevance, availability, coverage, currency, and quality:

- registers of business establishments and/or enterprises, and their inclusion of employment related administrative data;
- business surveys of characteristic tourism industries as identified and defined in the IRTS 2008, as well as any country-specific industries of national interest, and believed to be directly related to tourism activity. Availability, coverage, currency and quality of administrative and business survey information on employees, payroll and hours of work;
- resident population surveys of the volumes and social , employment and labour characteristics of the population and the labour force, such as a national census and labour force survey;
- travel surveys and other surveys of tourism demand, both international and domestic -- with particular attention to the coverage and detail obtained on tourism expenditures on characteristic tourism products/commodities as identified in IRTS 2008 (and also any country-specific tourism characteristic products/commodities, to be determined by each country by applying the criteria mentioned in IRTS 2008);
- analytical synthesis instruments, both generic to the national economy, such as the System of National Accounts, Input-output Accounts, Productivity Accounts, Income and Expenditure Accounts and Balance of Payments; or specific to tourism, such as a Tourism Satellite Account and/or tourism-specific economic impact models;
- particular attention should be given to assessing the extent and depth of coverage of relevant survey and administrative data sources, as well as analytical instruments, at regional and municipal levels; and lastly,

- gaps, limitations or opportunities for changes should be identified for potential future improvement initiatives.

A final element of the data and analysis situation review should be the identification, specification and endorsement by stakeholders of a strategic vision and recommended lines of action or, if possible, an action plan for future implementation and development of the tourism-specific employment and labour aspects of the statistical capacities of the country (or other geographic jurisdiction), (See for example National Task Force on Tourism Data, 1989).

## **Step 2: Tourism Satellite Account feasibility study**

Conduct a study of the feasibility of developing a Tourism Satellite Account (TSA) at the national level within the country based on the latest TSA:RMF 2008 international standard. This study should further identify and assess available required data sources (such as those described above). Of critical importance at this stage is the prerequisite availability of both domestic and international travel surveys or equivalent data sources for these components of tourism demand. In particular, potential data sources should be assessed in terms of the availability, appropriateness and quality of each data source for this specific use (See for example, National Task Force on Tourism Data, *Tourism Satellite Account: Working Paper No. 3*, 1991; and Lapierre and Wells, *A Proposal for a Satellite Account and Information System for Tourism*, 1991).

The strategic significance of the TSA, even as merely an initial conceptual framework, cannot be overstated. As noted in this case study and the previous case study for Indonesia (ILO, 2011), the strategic value of a TSA is that while practically all countries have a System of National Accounts to determine the economic values of GDP, value added of industries and other economic aggregates, tourism is usually not covered due to it being a demand-side sector. The concept of the TSA was conceived to remedy this lack of economic data on tourism. It provides a means of compiling information of the tourism-related economic activity of the different industries that serve visitors directly, and then the associated value added and can be summed to establish overall estimates of tourism GDP and tourism-related employment. For this reason, the TSA serves as the basic initial building block, even at the purely conceptual level, for identifying, observing and describing tourism related employment.

The study should include a re-examination and assessment of previously identified relevant data sources, as well as country classification systems, especially for industries and products, in the light of the specific operational requirements of this statistical development project. Of particular note, client stakeholders and members of the research and development team should not be discouraged if some seemingly important data sources are observed to be missing or inadequate in the initial feasibility assessment stage. The TSA was conceived as a continuous long-term project, and designed as a modular tool that can be revised and updated as new data sources become available and/or are improved as priorities and resources permit. Even within the Canadian system, after twenty five years of progressive development, improvement and expansion; a few important data gaps and weaknesses are present, such as coverage of vacation homes in Canada, which is still waiting for the time when priorities change and resources become available to address the associated data issues.

The feasibility study should also include preliminary recommendations on proposed operational definitions and methodological procedures to be applied in the national context for all the key TSA related measurement concepts, such as domestic tourism, international tourism, tourism products/commodities, tourism industries, tourism GDP, and employment in tourism industries and/or tourism employment.

The study should conclude with an assessment of the feasibility of implementing a TSA in the particular national context, plus some estimate of the associated timing and resource requirements, as well as proposed intra- or inter-organizational arrangements to ensure an appropriate level of collaboration and cooperation between tourism statisticians, national accounting functions and industry stakeholders and end-users of the resulting information.

### **Step 3: NSO-client multi-year research agreement**

Develop a Memorandum of Understanding (MOU) or partnership agreement between the national tourism office (NTO) and the national statistics office(s) (NSO) (with the possible inclusion, if relevant and feasible, of other stakeholders within the tourism industries, other agencies of the national government and/or sub-national levels of government) to establish common objectives and a shared action plan for growth, job creation, skill development and professionalization of human resource management and, most importantly, the improvement of tourism-specific information on employment in tourism industries and labour markets with the national economy.

### **Step 4: Tourism profiles of census and labour data**

Compile custom tabulations and write descriptive profiles of the personal and work characteristics of persons working in the country's (or other geographic jurisdictions') tourism industries using custom table specifications derived from the conceptual definitions of the country's tourism industries that emerge from the from steps one and two, in combination with the identified relevant available data sources. As reported from Canada's experiences, by using this methodological approach, it is possible to develop and produce relevant new information about the volumes and characteristics of the persons (and their jobs) working in the country's various national tourism industries, even before a country has developed its own tourism satellite account.

Furthermore, if reasonable quality census and labour force survey data are available for secondary analysis, it is potentially possible to produce new information relevant to national tourism industries at a very granular level of detail (e.g. occupations, industries, regions and major municipal jurisdictions). This is highly useful for a phenomenon like tourism; the nature of which varies significantly across localities and regions, as well as industries.

This secondary analysis of census and or labour force survey data for the purposes of describing the social aspects of employment in tourism industries can be extended even further if occupations are included as a personal characteristic variable in the previously collected data files. In particular, as seen from the Canadian experience, it is then possible to identify the most frequently occurring occupations in tourism industries and then profile them, in terms of the characteristics of persons working in those occupations within tourism industries. This step also provides the important

conceptual link to data on skill and the outputs of educational and training institutions relevant to the tourism industries.

This approach of data mining source data from existing national population surveys has the potential to provide valuable new information on the social and work aspects of employment in tourism industries at minimal cost without having to conduct new or extra/additional surveys.

#### **Step 5: TSA prototype research and development**

Conduct necessary further research and develop a prototype Tourism Satellite Account at the national level within the country (See Statistics Canada, 1989b), based on the latest TSA:RMF 2008 international standard. The actual research and development work should be initiated as quickly as possible, once the inclination and feasibility of developing and compiling a TSA has been established, and the cross-functional and multi-organizational partnership arrangements have been established (including devoted financial resources as well as the identification of appropriate experts to lead and carryout the work). Timely initiation of the project helps to sustain the interest, motivation and momentum developed from the previous stages. It also builds on the stakeholder agreements on concepts and basic methodologies and resource requirements, s as well as the specialized technical and working knowledge gained from the previous needs identification, data inventory and assessment and feasibility studies.

The first prototype version of a country's TSA should be pragmatic, focusing first on those modular elements for which data sources and estimation methodologies of sufficient relevance, credibility and quality are readily available. Data gaps, measurement, compilation and estimation limitations can be identified and described and included as cautionary notes to any preliminary estimates of the main aggregates (see for example, the first Canadian TSA by Lapierre and Hayes, 1994). These data quality or methodological limitations then become agenda items for future research and development activities.

With respect to developing measures of the employment aspects of tourism within the TSA, a key decision option at this stage is which of the two alternative key concepts of the employment related economic effects of tourism – *employment in tourism industries* and/or *tourism employment* -- to select and implement within the terms of the TSA prototype development project. The choice may depend on identified stakeholders' needs and priorities; judgments of the most appropriate statistical measures to apply in order to meet the identified the needs of data stakeholders and users<sup>93</sup>; and lastly, the confidence of the project statisticians in the respective estimation processes.

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<sup>93</sup> Despite the comment of the TSA:RMF on this subject, Canadian TSA statisticians believe that direct tourism employment is the most appropriate measure within the TSA given the primary measurement objectives of that specific statistical instrument; while other methodologies beyond the TSA as described herein provide the most appropriate vehicles for obtaining estimates of direct employment in the tourism industries.

Another important strategic choice at the TSA prototype development phase is whether or not to include a regional extension to the national TSA while developing the initial TSA prototype, or whether to develop the regional extension of the TSA at some future stage. The decision is significant since, on one hand, tourism demand, supply and related production and employment are known to vary significantly across localities and regions. As a result, national level estimates and proportions can be misrepresentative and misleading if they are applied to sub-national levels of the country. Thus, there is a need for each, and all, regions where tourism is significant to have comprehensive information on tourism for their respective areas. On the other hand, the coverage and quality of required data sources is usually strongest at the national level. Furthermore, extending the TSA development process downward from the national level to the regional level expands the complexity of the technical project exponentially. It also adds a non-technical political dimension to the management of an otherwise technical project.

Once the technical work of the developers of the prototype is completed, the primary partners may decide not to release initial preliminary estimates from the first prototype study, treating them as preliminary working estimates, as a result of the severity of the data limitations and the associated risks of misinterpretation or misuse. In some cases, several iterative preliminary prototypes may be produced before the lead partners responsible for the TSA development project are satisfied with the quality and credibility of the estimated results.

Alternatively, the partners may decide that even weak preliminary information is better than no information at all, particularly so, with regard to the industrial aspects of a demand-side phenomenon such as tourism, which is otherwise invisible in the national system of economic statistics. In that case, the lead partners may publish preliminary results providing users with the potential ranges of values for key aggregates, such as tourism employment or employment in tourism industries rather than discrete values.

#### **Step 6: National Tourism Indicators**

Develop and implement national tourism-specific economic indicators for tourism related employment in tourism industries. One of the limitations of the initial development and application of the TSA is that, while it provides a detailed and integrated view of the tourism demand, supply and production in the economy (including GDP and employment); it provides only a static statistical portrait for a chosen reference period. Another innovation reported in the Canadian case study is the procedure developed to produce quarterly estimates of the key TSA aggregates which are then carried forward on an annual basis to provide a new time series that enables observation and reporting on the dynamics of seasonal and annual patterns of growth of key economic aspects of tourism on a regular and timely basis (See for example, Statistics Canada, *Guide the National Tourism Indicators: Sources and Methods*, 1996).

Using this approach, the benchmark employment estimates in the TSA form the basis of quarterly estimates of tourism employment and/or employment in tourism industries in a new series of national quarterly estimates of indicator measures of tourism-related employment. The quarterly employment estimates are comparable with annual patterns of growth in a country's Productivity Accounts and quarterly job series reported by traditional industry categories.

One of the side benefits of this innovation is that, in addition to providing a dynamic view of annual patterns of growth in employment in tourism industries and/or tourism employment, it reduces the need for frequent updates to the TSA benchmark studies themselves in order to satisfy the ongoing demand from government and industry stakeholders for timely current high level estimates tracking the evolution of growth in key aspects of the tourism economy.

One of the main initial decision issues in the development of the indicators is the number of aggregate indicator measures that are needed. Identified users' needs are one important criterion of choice. For example, for HROs one or more measures of tourism-related employment is a priority. In the mid-1990's, when the NTI were being developed, Canada initially chose a relatively large number of about 269 indicator measures relating to the evolving national economic performance of tourism. The 269 original indicators included 26 main aggregates plus related variants (*current and constant \$ and seasonally adjusted/unadjusted, total demand, domestic and exports*) resulting in 162 expenditure series and 48 supply series, 12 tourism price series, and 21 tourism GDP series. Also included among them were 14 specific employment indicators, such as *employment generated by tourism demand in all tourism industries*, or alternatively each of the respective major industry groups, such as the *accommodation industry group*.

More than fifteen years later, due to budget constraints and changing perceptions of the relative usefulness and quality of the individual measures, the original number of 269 quarterly indicator measures of tourism economic performance has been trimmed down 33% to 180 indicator measures -- 20 key aggregates and resulting in 108 expenditure series; and 32 supply series (including 11 measures of tourism employment); 6 tourism price series; and 14 tourism GDP series -- that have stood the tests of time, optimal efficiency and need.

Another important consideration should be the quality of the underlying data sources supporting a given measurement. However, quality assessment is a difficult matter given the number and variety of data sources and methods employed in developing and producing the NTI. An important aspect of quality is the accuracy of the individual indicators. For which aggregates are these individual indicators considered quite accurate, and for which is the accuracy seen to be of lower quality?

Another key design and implementation decision is the level of interpretive description and analysis to include with reported data outputs and information products. Initially, the first edition of the NTI had 19 pages and no supplementary indicators and was a data availability announcement in the Statistics Canada's daily announcement publication, the *Daily* (See <http://www.statcan.gc.ca/daily-quotidien/960628/dq960628-eng.htm#ART4>).

Later, the NTI publication evolved into a fully descriptive and interpretive, 50-page published report for each quarterly release. The report also included a range of other relevant contextual trend data on aspects of tourism demand, such as quarterly international visitor volumes, and quarterly Balance of Payment tables of the Travel Account and the Transportation Account.

Currently, the quarterly release of the indicators has redesigned to include a Daily write-up, a short 5-page associated electronic report, accompanying updates to predefined time series tables in

Statistics Canada's CANSIM online website database national accounts tourism module which includes: all NTI data tables free), NTI definitions, data sources, and methods, Glossary (including all tourism terms), links to latest releases in Daily, links to all tourism publications on-line, and all related release dates, (see <http://www.statcan.gc.ca/nea-cen/index-eng.htm?MM>, CANSIM, tables 387-0001, 387-0002, 387-0003, 387-0008, 387-0010, 387-0011). The overall redesign of the NTI distribution system includes considerably more released information than in the NTI, all accessible on-line free of charge<sup>94</sup> via one portal.

Ideally, the quality characteristics of the indicators should be rigorously ascertained from measured sampling biases and variances, and other measurement error properties of the survey and other input data sources. In practice, this is not possible in any comprehensive manner, given the complexity of the estimation methods involved, the variety of inputs and the lack of reliable statistical measures of errors for many of these. A subjective approach is recommended instead, using ordinal quality ratings. The ratings are assigned by statisticians of the national accounts division of the NSO. The scale allows for three ratings: (1) most reliable, (2) reliable, and (3) acceptable (see *Guide to the National Tourism Indicators*, Statistics Canada, 1996). Another approach is to investigate how much revision there is in preliminary estimates.

Yet another set of important design and development decisions associated with the production of a fully integrated set of economic indicators associated with tourism-related employment, such as the NTI, is the need for countries to establish a policy and standing procedures for their regular revision and updating. Because the NTI are rooted in and linked with the SNA, they must undergo regular revisions (i.e. *current revisions, annual revisions, historical revisions and rebasing revisions*) in order to stay in step with other economic indicators and measures of the overall economy. If the NTI are not revised, eventually they could become at odds with the rest of the national statistical system. This would hamper the analysis of the NTI and eventually even render it meaningless if other related statistics were substantially revised (see *Revisions of the Canadian National Tourism Indicators*, Statistics Canada 2005).

### **Step 7: TSA Human Resource Module**

Research, develop and implement a human resource module or employment account extension the Tourism Satellite Account. Chapter 7: Employment in Tourism Industries of IRTS 2008 refers to significant recent progress in developing methodological frameworks for the integration of information on tourism-related employment with other macroeconomic aggregates. In particular, it cites the OECD *Guidelines of a Tourism Satellite Account: the employment module Employment*<sup>95</sup>, along with other improvements of international data comparability covered in Chapter 8 of the IRTS

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<sup>94</sup> Note that users used to have to pay to download the NTI series.

<sup>95</sup> See Organization for Economic Cooperation and Development. *Guidelines for a Tourism Satellite Account: the employment module*". Paris 1999.

2008 on the Tourism Satellite Account as well as the Tourism Satellite Account: Recommended Methodological Framework 2008.

As reported in this review, Canada has also developed another new tourism specific analytical statistical instrument – the Human Resource Module (HRM) of the Canadian Tourism Satellite Account (CTSA)<sup>96</sup>. As noted previously, this innovative new integrated data framework was designed to complement and enhance the analytical capacities provided the other existing instruments and methodological procedures discussed in the review. The aim of the Human Resource Module (HRM) is to provide more timely and reliable statistics on the human resource dimension of tourism with a higher degree of coherence and consistency with other key macroeconomic measures than previous less integrated approaches. It also allows for broader and deeper insights into the role of tourism in the economy through more detailed human resource information. The HRM provides another detailed statistical snapshot of the employment and human resource aspects of the tourism industries and their associated occupations. With regular annual updates it also provides insights into tourism related employment trends over time.

Because of the density of desired classification breakdowns, associated data confidentiality constraints, and data quality constraints; development of the HRM entails difficult choices of how many variables and which levels and groupings of industry and occupational categories to select and incorporate into the design of the new methodological process and information product, and which to exclude. The same decisions of inclusion/exclusion and/or grouping of response categories are required for a small number of selected individual personal characteristics that are carried within the HRM. The recommend approach is always to keep things as simple as possible.

Owing to the high degree of data granularity, resulting in smaller tabular cell sizes, appropriate data smoothing techniques are also recommended in the final data adjustment stages of the analytical process in order to produce sufficient stability in tabular results from which to extract meaningful trends (See the discussion of methodology in Martin, 2012:26-27).

### **Step 8: Compensation survey studies**

Collect and compile supplementary sub-national and municipal data on salaries and wages and non-wage benefits and perquisites for selected benchmark occupational positions in selected tourism industries. This information complements and supplements national aggregated salary and wage data by capturing information on the differences in salary and wage ranges across different regions and municipalities within the country. Content coverage of the survey should extend beyond salaries and wage data to also capture data on non-financial benefits and human resource management practices. Detailed sub-national data and related information on this subject is highly valued by industry decision makers as an aid to setting pay rates and assessing their competitiveness in attracting and retaining labour. Occasional supplementary survey studies of this kind should also

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<sup>96</sup> See Statistics Canada 2013. Human Resource Module of the Tourism Satellite Account, 2012. Statistics Canada – Catalogue no. 13-604-M no. 72.

collect and provide vital data on salary administration practices and human resource management and training policies and practices, relating directly to the mandates and goals of a national and regional tourism human resource organizations (see for example, R. A. Malatest and Associates, CTHRC, *2012 Canadian Tourism Sector Compensation Study*, 2013).

### **Step 9: Tourism unemployment**

Compile custom tabulations of established labour force data to derive tourism-specific measurements of monthly and average annual unemployment levels and rates for employed workers in the tourism industries.<sup>97</sup> This can be done using previously identified tourism industries in the country or jurisdiction of reference, combined with secondary analysis of established labor force survey data representing all experienced workers (both employed and unemployed) in the economy. As noted earlier, unemployed persons are those who, during the reference period, were available for work but were: on temporary layoff; were without work; or were to start a new job within four weeks. The derived estimated measures of tourism-specific unemployment levels and rates should then be compared with estimates of the employed and unemployed workers in the overall economy.

This process is another specific application of the data mining and secondary analysis of other non-tourism-specific data sources described previously in Step 4 for demographic and labour profiling of persons and jobs in the tourism industries. In fact, the option to develop this analytical application could be implemented much sooner in the recommended sequence of developments. Assuming relevant labor force survey data have been collected, are available, and are accessible from existing national surveys; this step could actually be implemented close to the beginning of a country's tourism-related employment data development strategy. In Canada's case, the need and potential opportunity for this application was only recognized at a later stage of development, in the aftermath of the 2008 global financial crisis and subsequent recession.

### **Step 10: Labour outlook models, forecasts and policy scenarios**

Construct and implement a portfolio of tourism-specific labour outlook models and develop associated labour and employment outlook forecasts and associated policy and exogenous shock impact scenarios. (See CTHRC- CTRI, *The Future of Canada's Tourism Sector: Shortages to Resurface as Labour Markets Tighten*, 2012; and Meis, 2010).

## **11.2 ILO and UNWTO: Develop a tourism view of the International Standard Classification of Occupations**

ILO and UNWTO should extend their current collaborative initiatives to include the development of a *tourism-specific thematic view* of the International Standard Classification of Occupations (ISCO). Thematic views are an alternative way of aggregating standard occupational data at a specific

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<sup>97</sup>To determine unemployment rates in Canada industry classifications (NAICS) at the 4-digit level are based on the most recent job held within the past year, and are self identified by the respondent.

classification level (e.g. the 4-digit level) of ISCO, according to selected aspects of skill specialization, such as the kinds of goods or services produced or the field of knowledge required.

As noted earlier, the TSA was originally developed to address the problem that, from industry production perspective tourism was found to be a cross-cutting demand side phenomenon in terms of the products or commodities and industries it involves. As reported in this case study review, Canada's experience researching and describing the occupations associated with the persons and jobs found in the tourism industries, reveals that tourism is also a cross-cutting phenomenon in terms of occupations.

Research relating using the Canadian National Occupational Classification in developing the HRM also revealed inconsistencies and incoherence problems arising from the arbitrariness with which existing definitions and descriptions of tourism occupations are currently used by industry stakeholders, as well as national and international organizations.

If other countries are to follow the previous country-level recommendation, Step 7, to develop a HRM similar to Canada's as a means of analyzing employment in tourism industries for the purposes of informing labour force improvement and employment growth policies and practices for the tourism industries; then national and international tourism statisticians and industry research analysts require another strong new concept, definitions, criteria and classifications of "characteristic" tourism occupations. ILO and UNWTO should take up this challenge (See for example Meis and Jackson, 2013, Meis, 2010b, and UNWTO, 2010).

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## Appendix I – Key Terminology

**Aboriginal peoples:** Refers to those persons who reported identifying with at least one Aboriginal group, that is, North American Indian, Métis or Inuit, and/or those who reported being a Treaty Indian or a Registered Indian, as defined by the *Indian Act* of Canada, and/or those who reported they were members of an Indian band or First Nation.

(<http://www12.statcan.ca/english/census06/reference/dictionary/pop002.cfm>)

**Age:** Refers to the age at last birthday (as of the census reference date, May 16, 2006). This variable is derived from date of birth. (<http://www12.statcan.ca/census-recensement/2006/ref/dict/pop005-eng.cfm>)

**Disabled persons:** Refers to persons identifying personal difficulties with daily activities and the reduction in the amount or kind of activities due to physical or mental conditions or health problems.

(<http://www12.statcan.ca/english/census06/reference/dictionary/pop024.cfm>)

**Education attainment (level):** Refers to the highest level of schooling that a person has reached. At the primary and secondary school level, educational attainment refers to the number of grades completed. At the postsecondary level, it refers to institutions attended and certificates, degrees or diplomas obtained.

(<http://www.statcan.gc.ca/concepts/definitions/education02-eng.htm>)

**Employed labour force:** Refers to persons who during the reference period: (a) Did any work at all at a job or business, that is, paid work in the context of an employer-employee relationship, or self-employment. It also includes persons who did unpaid family work, which is defined as unpaid work contributing directly to the operation of a farm, business or professional practice owned and operated by a related member of the same household; or (b) Had a job but were not at work due to factors such as their own illness or disability, personal or family responsibilities, vacation or a labour dispute. This category excludes persons not at work because they were on layoff or between casual jobs, and those who did not then have a job (even if they had a job to start at a future date).

(<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVDPPage1&db=imdb&dis=2&adm=8&TVD=114324&D=D>)

**Employee:** A person who works for others.

([www.statcan.gc.ca/pub/71-543-g/71-543-g2013001-eng.pdf](http://www.statcan.gc.ca/pub/71-543-g/71-543-g2013001-eng.pdf)) P12.

**Employee jobs:** All jobs in which the person employed draws compensation for services rendered and for whom the employer must complete a Revenue Canada T4 form. Jobs in which workers are paid by tips or commissions are included. Self-employed proprietors of unincorporated enterprises and unpaid family workers are not included.

(TSA:HRM 2012: 36) (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Full-time job:** One in which a person usually works 30 hours or more per week (TSA:HRM 2012: 36).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Full-time equivalent (FTE) jobs:** Is defined as total hours worked divided by average annual hours worked in full-time jobs. This can also be described as full-time-equivalent work-years. It is a less precise alternative to expressing labour input in terms of total hours worked (TSA:HRM 2012: 36). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Employment:** Employment is the number of all employee and self-employment (includes unpaid family workers) jobs in an industry. It should be noted that a job that exists for only part of the year (for example 4 months) counts as only a fraction of a job (1/3 of a job) for the year. It should also be noted that a part-time job at 10 hours a week counts as much as a full-time job at 50 hours a week; each is one job. (Kotsovos, 2007:70).

<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2007052-eng.htm>

**Gross domestic product (GDP):** The total unduplicated value of the goods and services produced in the economic territory of a country or region during a given period. GDP can be measured three ways: as total incomes earned in current production (income approach), as total final sales of current production (expenditure approach), or as total net values added in current production (value added approach). It can be valued either at basic prices or at market prices (TSA:HRM 2012: 36). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Hours worked:** Actual hours worked during normal periods of work, including overtime but excluding paid leave (e.g., holidays, sick leave), (TSA:HRM 2012: 36). <http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>

**Immigrant:** Refers to a person who is a landed immigrant (or has been and has become a Canadian citizen) or a non-permanent resident. A landed immigrant is a permanent resident who is not a Canadian citizen at birth. A non-permanent resident is a person who holds a study or work permit or who is a refugee claimant or is a family member living with this refugee claimant (TSA:HRM 2012: 36).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Industry:** An industry is a group of establishments engaged in the same or a similar kind of economic activity. <http://www.statcan.gc.ca/pub/13-604-m/13-604-m2007052-eng.pdf> p71.

**Job:** A job is defined as an explicit or implicit contract between a person and an institutional unit to perform work in return for compensation for a defined period or until further notice. The institutional unit may be the proprietor of an unincorporated enterprise; in this case the person is described as being self-employed and earns a mixed income. The number of jobs exceeds the number of persons employed by the number of second, third, etc. jobs (TSA:HRM 2012: 36).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Jobs generated by tourism:** Jobs that can be directly attributed to tourism demand, also referred to as tourism employment. (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2012070-eng.pdf> Page 38.)

**Labour force:** The civilian non-institutional population 15 years of age and over who are either employed or unemployed. (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2012070-eng.pdf> Page 38.)

**Labour Income:** Total earnings of employees, consisting of wages and salaries as well as supplementary labour income (such as employer's contributions to pension funds, employee welfare funds, the employment insurance Fund and worker's compensation funds). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2012070-eng.pdf> Page 38.)

**Main job:** The job at which the most hours are worked (TSA:HRM 2012: 36).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Mother tongue:** Refers to the first language learned at home in childhood and still understood by the individual at the time of the census.

(<http://www12.statcan.ca/english/census06/reference/dictionary/pop095.cfm>)

**Multiple-job holder:** A person who is employed in more than one job during the reference period (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Non-immigrant:** A non-immigrant is a person who is a Canadian citizen at birth (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Occupation:** A collection of jobs, sufficiently similar in work performed (tasks, duties and responsibilities) to be grouped under a common title for classification purposes (TSA:HRM 2012: 37). In this study an occupation also refers to the kind

of work persons aged 15 and over were doing during the reference week, as determined by the description of the main activities in their job. The 2006 Census data on occupation are classified according to the *National Occupational Classification for Statistics 2006 (NOC-S 2006)*. If the person did not have a job during the week prior to enumeration (May 16, 2006), the data relate to the job of longest duration since January 1, 2005. Persons with two or more jobs were to report the information for the job at which they worked the most hours.

(<http://www12.statcan.ca/english/census06/reference/dictionary/pop102.cfm>)

**Paid employment jobs** are those jobs where the incumbents hold explicit (written or oral) employment contracts which give them a basic remuneration. This is not directly dependent upon the revenue of the enterprise for which they work. Persons in these jobs are typically remunerated by wages and salaries, but may be paid by commission from sales, by piece-rates, bonuses or in-kind payments (see *Resolution concerning the International Classification of Status in Employment (ICSE-93)*, adopted by the 15<sup>th</sup> ICLS in 1993. International Labour Office, *Current International Recommendations on Labour Statistics* (Geneva, 2000); also at: <http://www.ilo.org/stat>).

**Part-time job:** One in which a person usually works less than 30 hours per week (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Place of birth:** Refers to the province or territory where the respondent was born, for respondents who were born in Canada, or to the country where the respondent was born, for respondents born outside Canada.

(<http://www12.statcan.ca/english/census06/reference/dictionary/pop118.cfm>)

**Visitors:** Visitors are persons who undertake tourism as defined above. They are referred to as either tourists (those who stay overnight or longer in the place visited), or same-day visitors. In Canada, “tourist” is used to denote all visitors, whether they are same-day or overnight visitors (TSA:HRM 2012: 38). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Wages and salaries:** Consists of monetary compensation and payments-in-kind (e.g., board and lodging), to wage earners and salaried persons employed in private, public and non-profit institutions in Canada including domestic servants and baby-sitters. Other forms of compensation included are commissions, bonuses, tips, directors’ fees, taxable allowances, and the values of stock options of corporations. Bonuses, commissions and retroactive wages are recorded in the period paid rather than earned. Wages and salaries are recorded on a gross basis, before deductions for taxes, employees’ contributions to employment insurance, and private and public pension plans (TSA:HRM 2012: 38).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Satellite account:** An accounting system that follows the basic principles of the System of National Economic Accounts but also expands the analytical capacity for selected areas of economic or social concern, without overburdening or disrupting the central system. Satellite accounts are linked with the central framework of the national accounts and through them to the main body of integrated economic statistics (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**School attendance:** Information indicating whether the individual attended school at any time between September 2005 and May 16, 2006 and the type of school attended. (<http://www12.statcan.ca/census-recensement/2006/ref/dict/pop007-eng.cfm>)

**Self-employment:** includes working owners of an incorporated business, farm or professional practice, or working owners of an unincorporated business or professional practice or working owners of an unincorporated business, farm or professional practice; as well as self-employed workers who do not own a business (such as babysitters). Also included amount the self employed are unpaid family workers. They are persons who work without pay on a farm or in a business or profession practice owned and operated by another family member living in the same dwelling.

(<http://www.statcan.gc.ca/pub/71-543-g/71-543-g2013001-eng.pdf>) P16.

**Self-employment jobs:** Includes working-owners of unincorporated enterprises, and members of their households who work without a wage or salary (i.e., unpaid family workers) (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Supplementary labour income:** Expenditures by employers on their labour account which are regarded as compensation of employees. It includes contributions to employment insurance, private and public pension plan contributions, worker's compensation, health and life insurance plans, and retirement allowances (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**System of National Accounts (SNA):** The System of National Accounts (SNA) consists of a coherent, consistent and integrated set of macroeconomic accounts, balance sheets and tables based on a set of internationally agreed concepts, definitions, classifications and accounting rules. In its broad outline, the Canadian System of National Accounts (CSNA) bears a close relationship to the international standard as described in the United Nations publication: System of National Accounts 1993(TSA:HRM 2012: 37).(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Total hours worked:** The aggregate number of hours actually worked during the year in employee and self-employment jobs (TSA:HRM 2012: 37). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Tourism:** The definition of tourism adapted from the World Tourism Organization and the United Nations Statistical Commission is: "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes." In Canada, usual environment is defined as less than 80 kilometers one way away from home. Crossing an international boundary is considered tourism regardless of distance traveled. Exclusions are commuting, travel for education, travel by armed forces or diplomats, and migration.

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2003040-eng.pdf>) P39.

**Tourism commodity:** Tourism commodity is one for which an important part of its total demand in Canada comes from visitors (TSA:HRM 2012: 37). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Tourism demand:** The spending of Canadian visitors and non-resident visitors on domestically produced commodities. It is the sum of tourism domestic demand and tourism exports (TSA:HRM 2012: 37).

(<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Tourism industry:** is an industry that provides tourism commodities to visitors and would cease to exist without tourism or would continue to exist only at a significantly reduced level of activity. The collection of Canadian industries that meet this criterion make up the Canadian tourism sector. (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2003040-eng.pdf>) P10.

**Tourism occupation penetration rate:** is defined as the percentage of people working in a specific tourism occupation as calculated for key personal characteristics: age, sex, and immigrant status in the Tourism Labour Supply and Demand Forecasting Models of the Canadian Tourism Research Institute of the Conference Board of Canada (CTRI, 2012).

**Unemployment:** Unemployed persons are those who, during reference week, were available for work and

were either on temporary layoff, had looked for work in the past four weeks or had a job to start within the next four weeks. Guide to the Labour Force Survey. P17.

<http://www.statcan.gc.ca/pub/71-543-g/71-543-g2013001-eng.pdf>.

**Unpaid family workers:** Persons who work without pay on a farm or in a business or professional practice

owned and operated by another family member living in the same dwelling. Guide to the Labour Force Survey. P19-20.

<http://www.statcan.gc.ca/pub/71-543-g/71-543-g2013001-eng.pdf>

**Visible minority:** Refers to the visible minority group to which the respondent belongs. The *Employment Equity Act* defines visible minorities as “persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour”. (<http://www12.statcan.ca/english/census06/reference/dictionary/pop127.cfm>)

**Visitors:** Visitors are persons who undertake tourism as defined above. They are referred to as either tourists (those who stay overnight or longer in the place visited), or same-day visitors. In Canada, “tourist” is used to denote all visitors, whether they are same-day or overnight visitors (TSA:HRM 2012: 38). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Wages and salaries:** Consists of monetary compensation and payments-in-kind (e.g., board and lodging), to wage earners and salaried persons employed in private, public and non-profit institutions in Canada including domestic servants and baby-sitters. Other forms of compensation included are commissions, bonuses, tips, directors’ fees, taxable allowances, and the values of stock options of corporations. Bonuses, commissions and retroactive wages are recorded in the period paid rather than earned. Wages and salaries are recorded on a gross basis, before deductions for taxes, employees’ contributions to employment insurance, and private and public pension plans. (TSA:HRM 2012: 38). (<http://www.statcan.gc.ca/pub/13-604-m/13-604-m2013072-eng.pdf>)

**Work activity in 2005:** Refers to the number of weeks in which a person worked for pay or in self-employment in 2005 at all jobs held, even if only for a few hours, and whether these weeks were mostly full time (30 hours or more per week) or part time (1 to 29 hours per week). The term 'full-year full-time workers' refers to persons 15 years of age and over who worked 49 to 52 weeks (mostly full time) in 2005 for pay or in self-employment. (<http://www12.statcan.ca/english/census06/reference/dictionary/pop131.cfm>)

## Appendix II – NAICS descriptions of tourism industries

ACCOMMODATIONS
<b>NAICS 7211 – Traveller Accommodation</b>
<b>721111 Hotels:</b> comprises establishments primarily engaged in providing short-term lodging in facilities known as hotels. These establishments provide suites or guest rooms within a multi-storey or high-rise structure, accessible from the interior only, and they generally offer guests a range of complementary services and amenities, such as food and beverage services, parking, laundry services, swimming pools and exercise rooms, and conference facilities.
<b>721112 Motor hotels:</b> comprises establishments primarily engaged in providing short-term lodging in facilities known as motor hotels. These establishments are designed to accommodate clients travelling by motor vehicle and provide short-stay suites or guest rooms within a low-rise structure, characterized by ample, convenient parking areas, interior access to rooms, and their location along major roads. Limited complementary services and amenities may also be provided.
<b>721113 Resorts:</b> comprises establishments primarily engaged in providing short-term lodging in facilities known as resorts. These establishments feature extensive indoor and/or outdoor leisure activities on the premises on a year-round basis. Resorts are designed to accommodate vacationers and provide full-service suites and guest rooms, typically in a non-urban setting next to lakes, rivers or mountains. Establishments of this type often provide access to conference facilities.
<b>721114 Motels:</b> comprises establishments primarily engaged in providing short-term lodging in facilities known as motels. These establishments are designed to accommodate clients travelling by motor vehicle, and provide short-stay suites or guest rooms, within a one or two-storey structure, characterized by exterior access to rooms and ample parking areas adjacent to the room entrances. Limited complementary services and amenities may also be provided.
<b>721120 Casino hotels:</b> establishments primarily engaged in providing short-term lodging in hotel facilities with a casino on the premises. The casino operation includes table wagering games and may include other gambling activities, such as slot machines and sports betting. These establishments generally offer a range of services and amenities, such as food and beverage services, entertainment, valet parking, swimming pools, and conference and convention facilities.
<b>721191 Bed and breakfast:</b> comprises establishments primarily engaged in providing short-term lodging in facilities known as bed and breakfast homes. These establishments provide guest rooms in private homes or in small buildings converted for this use, and they often possess a unique or historic character. Bed and breakfast homes are characterized by a highly personalized service, and the inclusion, in the room rate, of a full breakfast, served by the owner or owner-supervised staff.
<b>721192 Housekeeping cottages and cabins:</b> comprises establishments primarily engaged in providing short-term lodging in facilities known as housekeeping cottages and cabins. These establishments are designed to accommodate vacationers and may include access to private beaches and fishing.
<b>721198 All other traveller accommodation:</b> comprises establishments, not classified to any other industry, primarily engaged in providing short-term lodging.
<b>NAICS 7212 – RV (Recreational Vehicle) Parks and Recreational Camps</b>
<b>721211 RV (recreational vehicle) parks and campgrounds:</b> comprises establishments primarily engaged in operating serviced or un-serviced sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and facilities, and stores and snack bars.
<b>721212 Hunting and fishing camps:</b> comprises establishments primarily engaged in operating hunting and fishing camps. These establishments provide a range of services, such as access to outpost camps or housekeeping cabins, meals and guides, and they may also provide transportation to the facility, and sale of food, and hunting and fishing supplies.
<b>721213 Recreational (except hunting and fishing) and vacation camps:</b> comprises establishments primarily engaged in operating overnight recreational camps, such as children's camps, family vacation camps, and outdoor adventure retreats that offer trail riding, white-water rafting, hiking and similar activities. These establishments provide accommodation facilities, such as cabins and fixed camp sites, and other amenities, such as food services, recreational facilities and equipment, and organized recreational activities. Excludes establishments primarily engaged in operating instructional camps and children's day camps.

## FOOD AND BEVERAGE SERVICES

### NAICS 7221 – Full-service restaurants

**72211 Full-service restaurants:** comprises establishments primarily engaged in providing food services to patrons who order and are served while seated and pay after eating. These establishments may sell alcoholic beverages, provide take-out services, operate a bar or present live entertainment, in addition to serving food and beverages.

### NAICS 7222 – Limited service eating places

**72221 Limited-service eating places:** comprises establishments primarily engaged in providing foodservices to patrons who order or select items at a counter, food bar or cafeteria line (or order by telephone) and pay before eating. Food and drink are picked up for consumption on the premises or for take-out, or delivered to the customer's location. These establishments may offer a variety of food items or they may offer specialty snacks or non-alcoholic beverages. Excludes food service establishments engaged in preparing and serving meals and snacks from motorized vehicles or non-motorized carts (72233, Mobile Food Services)

### NAICS 7224 – Drinking places (Alcoholic beverages)

**72241 Drinking places (alcoholic beverages):** comprises establishments, known as bars, taverns or drinking places, primarily engaged in preparing and serving alcoholic beverages for immediate consumption. These establishments may also provide limited food services. Excludes civic or social organizations that operate a bar for their members (81341, Civic and Social Organizations)

## RECREATION AND ENTERTAINMENT

### NAICS 5121 – Motion picture and video industries

**51213 Motion picture and video exhibition:** comprises establishments primarily engaged in exhibiting motion pictures. Establishments primarily engaged in providing occasional motion picture exhibition services, such as those provided during film festivals, are also included.

### NAICS 7111 – Performing Arts Companies

**71111 Theatre (except musical) companies:** comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses. Theatre companies that operate their own facilities, primarily for the staging of their own productions, are included.

**71112 Musical theatre and opera companies:** comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses, opera singers and other vocalists. Establishments, known as dinner theatres, engaged in producing live theatrical entertainment and in providing food and beverages for consumption on the premises, are included.

**71120 Dance companies:** comprises establishments primarily engaged in producing live presentations that involve the performances of dancers. Dance companies that operate their own facilities, primarily for the staging of their own production, are included.

**71130 Musical groups and artists:** comprises establishments primarily engaged in producing live presentations that involve the performances of musicians and/or vocalists. Establishments in this industry may consist of groups or individual artists. Examples of establishments in this industry are chamber and symphony orchestras, country music groups, jazz music groups, and pop and rock music groups, as well as independent musicians and vocalists.

**71190 Other performing arts companies:** comprises establishments, not classified to any other industry, primarily engaged in producing live performing arts presentations.

### NAICS 7112 – Spectator Sports

**71211 Sports teams and clubs:** comprises professional, semi-professional, or amateur sports clubs primarily engaged in presenting sporting events before an audience. These establishments may or may not operate the facility for presenting these events.

**71213 Horse race tracks:** comprises establishments primarily engaged in operating horse race tracks and presenting horse racing events.

**71218 Other spectator sports:** comprises establishments, not classified to any other Canadian industry, primarily engaged in operating race tracks and presenting racing events, other than horse race tracks and horse racing events. Independent athletes, such as golf professionals, professional boxers, tennis players and race car drivers, are also included.

<b>NAICS 7115 – Independent artists, writers and performers</b>
<b>71151 Independent artists, writers and performers:</b> comprises independent individuals (freelance) primarily engaged in creating artistic and cultural visual art works, or providing technical expertise necessary for these works.
<b>NAICS 7121 – Heritage Institutions</b>
<b>712111 Non-commercial art museums and galleries:</b> comprises establishments primarily engaged in acquiring, researching, conserving, interpreting, and exhibiting art to the public. Art museums and art galleries with permanent collections are included.
<b>712115 History and Science Museums:</b> comprises establishments primarily engaged in acquiring, conserving, interpreting, exhibiting and making accessible to the public, objects of historical and cultural value.
<b>712119 Other Museums:</b> comprises establishments primarily engaged in the operation of exhibits, except non-commercial art museums and galleries, and history and science museums.
<b>712120 Historic and heritage sites:</b> This Canadian industry comprises establishments primarily engaged in maintaining, protecting and making accessible for public viewing, sites, buildings, forts or communities that illustrate events or persons of particular historical interest.
<b>712130 Zoos and botanical gardens:</b> comprises establishments primarily engaged in constructing and maintaining displays of live plant and animal life for public viewing.
<b>712190 nature Parks and other similar institutions:</b> This Canadian industry comprises establishments, not classified to any other industry, primarily engaged in operating other heritage institutions. Establishments primarily engaged in operating, maintaining and protecting nature parks, nature reserves or conservation areas, are included.
<b>NAICS 7131 – Amusement Parks and Arcades</b>
<b>713110 Amusement and theme parks:</b> comprises establishments, known as amusement or theme parks, primarily engaged in operating a variety of attractions, such as mechanical rides, water slides, games, shows and theme exhibits. These establishments may lease space to others on a concession basis.
<b>713120 Amusement arcades:</b> establishments primarily engaged in operating amusement arcades and parlours.
<b>NAICS 7132 – Gambling Industries</b>
<b>713210 Casinos (except casino hotels):</b> establishments primarily engaged in operating gambling facilities that offer table wagering games along with other gambling activities, such as slot machines. These establishments often provide food and beverage services.
<b>713299 All other gambling industries:</b> comprises establishments, not classified to any other Canadian industry, primarily engaged in providing gambling services.
<b>NAICS 7139 – Other amusement and recreation industries</b>
<b>713910 Golf courses and country clubs:</b> establishments primarily engaged in operating golf courses and country clubs that operate golf courses along with dining facilities and other recreational facilities. These establishments often provide food and beverage services, equipment rental services and golf instruction services.
<b>713920 Skiing facilities:</b> comprises establishments primarily engaged in operating downhill and cross-country skiing areas, and equipment, such as ski lifts and tows. These establishments often provide food and beverage services, equipment rental services and ski instruction services.
<b>713930 Marinas:</b> comprises establishments, known as marinas, primarily engaged in operating docking and storage facilities for pleasure-craft owners, with or without related activities, such as retailing fuel and marine supplies, and boat repair and maintenance, and rental services. Sailing clubs and yacht clubs that operate marinas are included.
<b>713950 Bowling centres:</b> comprises establishments primarily engaged in operating bowling centres. These establishments often provide food and beverage services.
<b>713990 All other amusement and recreation industries:</b> comprises establishments, not classified to any other industry, primarily engaged in operating recreation and amusement facilities and services, including providing tourist, hunting and fishing guide services. Establishments primarily engaged in maintaining coin-operated amusement devices, in businesses operated by others, are included.

## TRANSPORTATION

### NAICS 4811 – Scheduled air transportation

**481110 Scheduled air transportation:** comprises establishments primarily engaged in transporting passengers and/or goods by aircraft, over regular routes and on regular schedules. Establishments in this industry have less flexibility with respect to choice of airports, hours of operation, load factors and similar operational characteristics than do establishments in 4812, Non-Scheduled Air Transportation.

### NAICS 4812 – Non-scheduled air transportation

**481214 Non-scheduled chartered air transportation:** comprises establishments primarily engaged in the non-scheduled air transportation of passengers and/or goods by aircraft, at a toll per mile or per hour for the charter of the aircraft.

**481215 Non-Scheduled Specialty Flying Services:** comprises establishments primarily engaged in providing a combination of flying services, with no single service predominating. These establishments use small, general-purpose aircraft. The services performed may be specialized, such as aerial photography, touring, towing advertising banners, skywriting, and aerial traffic reporting, or general air transportation of passengers and goods.

### NAICS 4821 – Rail transportation

**482114 Passenger rail:** comprises establishments primarily engaged in the railway transport of passengers.

### NAICS 4831 – Deep Sea, Coastal and Great Lakes Water Transportation

**483115 Deep Sea, Coastal and Great Lakes Water Transportation (except Ferries):** comprises establishments primarily engaged in deep sea, coastal and Great Lakes water transportation of freight and passengers. The St. Lawrence Seaway is considered to be part of the Great Lakes system. Establishments that operate ocean-going cruise ships are included.

**483116 Deep Sea, Coastal and Great Lakes Water Transportation by Ferries:** comprises establishments primarily engaged in operating ferries for the transport of passengers and/or freight contained in self-propelled, motorized vehicles, in deep sea, coastal or Great Lakes waters. Excludes establishments that primarily operate inland, including harbours and ferries.

### NAICS 4832 – Inland water transportation

**483213 Inland water transportation (except by ferries):** This Canadian industry comprises establishments primarily engaged in the inland water transportation of freight and passengers, except by ferries.

**483214 Inland water transportation:** comprises establishments primarily engaged in the inland water transportation of freight and passengers. Transportation within harbours is included.

### NAICS 485 (4851, 4852, 4853, 4854, 4855, 4859) – Transit and Ground Passenger Transportation

**485110 Urban transit systems:** comprises establishments primarily engaged in operating local and suburban mass passenger transit systems. Such transportation may involve the use of one or more modes of transport including light rail, subways and streetcars, as well as buses. These establishments operate over fixed routes and schedules, and allow passengers to pay on a per-trip basis (whether or not they also use payment methods such as monthly passes).

**485210 Interurban and rural bus transportation:** comprises establishments primarily engaged in providing passenger transportation, principally outside a single municipality and its suburban areas, primarily by bus. These establishments operate over fixed routes and schedules, and charge a per-trip fee.

**485310 Taxi service:** comprises establishments primarily engaged in providing passenger transportation by taxi (that is, automobiles, except limousines), not operated on regular schedules or routes. Taxicab fleet owners and organizations that provide dispatch services are included, regardless of whether drivers are hired, rent their cabs or are otherwise compensated. Owner-operated taxicabs are included.

**485320 Limousine service:** This industry comprises establishments primarily engaged in providing passenger transportation by limousine.

**485410 School and employee bus transportation:** comprises establishments primarily engaged in operating buses and other motor vehicles to transport pupils to and from school or employees to and from work. These establishments operate over fixed routes and schedules, but do not charge a per-trip fee.

**485510 Charter bus industry:** comprises establishments primarily engaged in providing charter bus services. These establishments do not operate over fixed routes and schedules, and rent the entire vehicle, rather than individual seats.

**485990 Other transit and ground passenger transportation:** comprises establishments, not classified to any other industry, primarily engaged in providing shuttle services to airports and similar facilities, special needs transportation services and other transit and ground passenger transport. Shuttle services included in this industry are those that use vans and/or buses as a means of transport. They usually travel on fixed routes and service particular hotels or carriers. Special needs transportation establishments use conventional or specially converted vehicles to provide passenger transportation to the infirm, elderly or handicapped.

**NAICS 487 (4871, 4872, 4879) – Scenic and sightseeing transportation**

**487110 Scenic and sightseeing transportation, land:** comprises establishments primarily engaged in providing scenic and sightseeing transportation on land, such as steam train excursions and horse-drawn sightseeing rides.

**487210 Scenic and sightseeing transportation, water:** comprises establishments primarily engaged in providing scenic and sightseeing transportation on water, such as sightseeing or dinner cruises or air-boat rides. These establishments often use vintage or specialized transportation equipment. The services provided are local in nature, usually involving same-day return. Establishments that provide charter fishing services are included.

**487990 Scenic and sightseeing transportation, other:** comprises establishments, not classified to any other industry, primarily engaged in providing scenic and sightseeing transportation. Some examples of these services are scenic helicopter rides and hot-air balloon rides.

**NAICS 5321 – Vehicle rental and leasing**

**53211 Passenger car rental:** comprises establishments primarily engaged in renting or leasing passenger cars without drivers. Examples of establishments in this industry are car rental agencies and passenger car lessors.

**53212 Truck, utility trailer and RV (recreational vehicle) rental and leasing:** comprises establishments primarily engaged in renting or leasing trucks, truck tractors, buses, semi-trailers, utility trailers and RVs (recreational vehicles), without drivers.

**TRAVEL SERVICES**

**NAICS 5615 – Travel arrangement and reservation services**

**56151 Travel agencies:** comprises establishments primarily engaged in acting as agents for tour operators, transportation companies and accommodation establishments in selling travel, tour and accommodation services to the general public and commercial clients.

**561520 Tour operators:** comprises establishments primarily engaged in arranging, assembling and marketing tours, generally through travel agencies. Excluded are establishments primarily engaged in conducting local scenic and sightseeing tours, providing tourist, hunting and fishing guide services, providing access to facilities and services without accommodation, and providing only short-stay accommodation and/or food services.

**561590 Other travel arrangement and reservation services:** comprises establishments primarily engaged in providing travel arrangement and reservation services, except travel agencies and tour operators.

**Sources:** Who's Working For You? A Demographic Profile of Tourism Sector Employees, Appendix III, CTHRC, 2012 and North American Industry Classification System (NAICS) 2007 <http://www.statcan.gc.ca/subjects-sujets/standard-norme/naics-scian/2007/index-indexe-eng.htm>

## Appendix III – Descriptions of tourism occupations

OCCUPATION (listed alphabetically)	NOC-S	NOC
<b>NOC2006 0632 – Accommodation Service Managers</b>	<b>A222</b>	<b>0632</b>
<p>Accommodation service managers plan, organize, direct, control and evaluate the operations of an accommodation establishment or of a department within such an establishment. They are employed by hotels, motels, resorts, student residences and other accommodation establishments, or they may be self-employed. <u>Exclusions:</u> Senior managers in accommodation, Specialized managers, Executive housekeepers, and Restaurant and food service managers. <u>Example titles:</u> accommodation services manager, accommodations manager, assistant manager hotel, bed and breakfast manager, bed and breakfast operator, campground manager, campground operator, front desk manager, front desk manager - accommodation services, front desk manager hotel, front office manager hotel, guest services manager, hotel assistant manager, hotel director, hotel front desk manager, hotel front office manager, hotel manager, hotel operator, hunting and fishing lodge manager, hunting camp operator, innkeeper, lodging house manager, motel manager, recreational campground manager, reservations manager, resort manager, rooms division director, rooms manager, seasonal resort manager, ski resort manager, student residence manager, and tourist home operator.</p>		
<b>NOC2006 1431 – Accounting and Related Clerks</b>	<b>B531</b>	<b>1431</b>
<p>Accounting and related clerks calculate, prepare and process bills, invoices, accounts payable and receivable, budgets and other financial records according to established procedures. They are employed throughout the private and public sectors. <u>Exclusions:</u> Supervisors of accounting and related clerks, Bookkeepers, payroll clerks. <u>Example titles:</u> account audit clerk, account verification clerk, accounting and auditing clerk, accounting assistant, accounting clerk, accounts payable and receivable clerk, control clerk - hotel and restaurant, food and beverage control clerk - inventory food controller, night auditor, accounts clerk, senior accounting clerk.</p>		
<b>NOC2006 2271 – Air Pilots, Flight Engineers and Flying Instructors</b>	<b>C171</b>	<b>2271</b>
<p>Pilots fly fixed wing aircraft and helicopters to provide air transportation and other services. Flight engineers (second officers) monitor the functioning of aircraft during flight and may assist in flying aircraft. Flying instructors teach flying techniques and procedures to student and licensed pilots. Air pilots, flight engineers and flight instructors are employed by airline and air freight companies, flying schools, the armed forces and by other public and private sector aircraft operators. <u>Example titles:</u> aerial survey pilot, air navigator, air pilot, airline pilots instructor, bush pilot, chief flying instructor, commercial airline pilot, co-pilot, crop duster, executive pilot, air transport flight engineer, flying instructor, airline pilot, second officer, air pilots and flight engineers.</p>		
<b>NOC2006 6433 – Airline Ticket and Service Agents</b>	<b>G713</b>	<b>6433</b>
<p>Airline sales and service agents issue tickets, provide fare quotations, make reservations, conduct passenger check-in, trace missing baggage, arrange for cargo shipments and perform other related customer service duties to assist airline passengers. Airline sales and service agents are employed by airline companies. Load planners, who plan the positioning of cargo on aircraft, are also included in this unit group. <u>Example titles:</u> agent ticket and information – airline; agent, cargo – airline; agent, check-in – airline; agent, commissary - airline; agent, counter services – airline; agent, customer sales – airline; agent, customer service – airline; agent, passengers – airline; agent, reservations – airline; agent, tickets – airline; airline baggage agent; airline cargo agent; airline customer service representative; airline reservation agent; airline sales and service agent; airline ticket agent; baggage agent – airline; client service representative – airline; customer sales agent – airline; customer service agent, airline; customer service representative – airline; passenger sales representative – airline; passenger service representative; reservation sales agent – airline; ticket agent, ticket and information agent.</p>		
<b>NOC2006 6252 – Bakers</b>	<b>G942</b>	<b>6252</b>
<p>Bakers prepare bread, rolls, muffins, pies, pastries, cakes and cookies in retail and wholesale bakeries and dining establishments. They are employed in bakeries, supermarkets, catering companies, hotels, restaurants, hospitals, and other institutions, or they may be self-employed. Bakers who are supervisors are included in this unit group. <u>Exclusions:</u> Pastry chefs. <u>Example titles:</u> apprentice baker, bagel baker; bagel maker; baker; bakery bench hand; bakery supervisor; biscuit baker; bread baker; cake and pastry decorator; cake baker; cake icer; donut baker; donut maker; grocery store baker; head baker; hotel baker; icer, hand – bakery; junior baker; muffin baker; muffin maker; pastry decorator; pastry maker; patissier, baker; specialty foods baker; wedding cake decorator.</p>		
<b>NOC2006 6452 – Bartenders</b>	<b>G512</b>	<b>6452</b>
<p>Bartenders mix and serve alcoholic and non-alcoholic beverages. They are employed in restaurants, hotels, bars, taverns, private clubs, banquet halls and other licensed establishments. Supervisors of bartenders are included in this unit group. <u>Exclusions:</u> those who bring alcoholic drinks to tables in restaurants are considered as waiters and waitresses and are classified as Food and Beverage Servers. <u>Example Titles:</u> bar attendant; bar steward; barkeeper; barmaid; barman/woman; bartender; head barmaid; head barman/woman; head bartender; lounge supervisor-bartender; managing bartender; service bartender; supervisor, bartenders; tapman/woman.</p>		

<b>OCCUPATION</b> <i>(listed alphabetically)</i>	<b>NOC-</b>	<b>NOC</b>
<b>NOC2006 7412 – Bus Drivers and Subway and Other Transit Operators</b>	<b>H712</b>	<b>7412</b>
<p>This unit group includes workers who drive buses and operate streetcars, subway trains and light rail transit vehicles to transport passengers on established routes. Bus drivers are employed by urban transit systems, elementary and secondary schools and private transportation companies. Streetcar, subway and light rail transit operators are employed by urban transit systems. <u>Exclusions</u>: Supervisors of bus drivers. <u>Example Titles</u>: bus driver; charter bus driver; motor coach driver; driver, public passenger transit; driver, school bus; ground transportation driver; light rail transit operator; operator, bus; operator, streetcar; operator, subway; operator, urban transit; school bus driver; shuttle bus driver; shuttle operator; sightseeing bus driver; sightseeing tour driver; streetcar conductor; streetcar operator; subway train operator; transit operator; trolley bus operator.</p>		
<b>NOC2006 6611 – Cashiers</b>	<b>G311</b>	<b>6611</b>
<p>Cashiers operate cash registers, optical price scanners, computers or other equipment to record and accept payment for the purchase of goods, services and admissions. They are employed in stores, restaurants, theatres, business offices and other retail and wholesale establishments. <u>Exclusions</u>: grocery store clerks, other sales clerks, supervisors of cashiers, bank cashiers. <u>Example Titles</u>: box office cashier; cafeteria cashier; car park cashier; cashier; cashier, casino; cashier, customer service; cashier, hotel; currency exchange cashier; customer service cashier; dining room cashier; front desk cashier; gas bar attendant; racetrack cashier; restaurant cashier; theatre cashier; ticket seller – cashier.</p>		
<b>NOC2006 6443 – Casino Occupations</b>	<b>G723</b>	<b>6443</b>
<p>Gambling casino workers operate gaming tables, maintain slot machines, accept keno wagers, pay out winning bets and jackpots and collect losing bets. They are employed by gambling casinos. Supervisors of gambling casino workers are included in this unit group. <u>Exclusions</u>: Game concession operators and bingo hall workers. <u>Example Titles</u>: baccarat croupier; blackjack croupier; casino gambling dealer; croupier; dealer, gambling casino; gambling casino runner; gambling casino section head; gambling casino shift manager; gambling casino slot machine attendant; gambling table operator; gaming table dealer; gaming table operator – casino; gaming tables supervisor; keno dealer; keno runner, casino; pai gow croupier; pai gow domino croupier; pai gow poker croupier; pit boss gaming; poker croupier; roulette croupier; sic bo croupier; slot machine attendant; slot machines section head; slot supervisor; super pan 9 croupier; supervisor, gaming tables.</p>		
<b>NOC2006 6241 – Chefs</b>	<b>G411</b>	<b>6241</b>
<p>This unit group includes various types of chefs who plan and direct food preparation and cooking activities and who prepare and cook meals and specialty foods. They are employed in restaurants, hotels, hospitals and other health care institutions, central food commissaries, clubs and similar establishments, and on ships. <u>Exclusions</u> : des cooks. <u>Example Titles</u>: assistant chef; banquet chef; chef; chef de cuisine; chef de partie; chef patissier; corporate chef; entremetier; executive chef; executive sous-chef; first sous-chef; garde-manger chef; head chef; master chef; meat, poultry and fish chef; pasta chef; pastry chef; rotisserie chef; saucier; second chef; sous-chef; specialist chef; specialty foods chef; supervising chef; working sous-chef.</p>		
<b>NOC2006 1226 – Conference and Event Planners</b>	<b>B316</b>	<b>1226</b>
<p>Conference and event planners plan, organize and co-ordinate conferences, conventions, meetings, seminars, exhibitions, trade shows, festivals and other events. They are employed by tourism associations, trade and professional associations, convention and conference centres, governments and by conference and event planning companies. Excludes public relations officers. <u>Example Titles</u>: conference and meeting planner; conference co-ordinator; conference organizer; conference planner; conference services officer; convention and special events planner; convention co-ordinator; convention planner; convention planning services officer; co-ordinator, special events; event co-ordinator; event planner; exhibition co-ordinator; festival organizer; meeting co-ordinator; meeting planner; organizer, special events; social events co-ordinator; special events organizer; trade show organizer; trade show planner.</p>		
<b>NOC2006 6242 – Cooks</b>	<b>G412</b>	<b>6242</b>
<p>Cooks prepare and cook a wide variety of foods. They are employed in restaurants, hotels, hospitals and other health care institutions, Central food commissaries, educational institutions and other establishments. Cooks are also employed aboard ships and at construction and logging campsites. Apprentice cooks are included in this unit group. <u>Example Titles</u>: apprentice cook; assistant cook; banquet cook. breakfast cook; broiler cook; cook; cook, apprentice; domestic cook; ethnic food cook; first cook; grill cook; hospital cook; journeyman /woman cook; kosher foods cook; licensed cook; line cook; mess cook; pastry cook; pizza cook; restaurant cook; second cook; ship's cook; short-order cook; special diet cook; special orders cook, hospital; therapeutic diet cook; third cook.</p>		

OCCUPATION <i>(listed alphabetically)</i>	NOC-S	NOC
<b>NOC2006 1453 – Customer Service, Information and Related Clerks</b>	<b>B553</b>	<b>1453</b>
<p>This unit group includes clerks who answer enquiries and provide information regarding an establishment's goods, services and policies and who provide customer services such as receiving payments and processing requests for services. They are employed by retail establishments, call centres, insurance, telephone and utility companies and other establishments throughout the private and public sectors.</p> <p><u>Exclusions:</u> Receptionists, Supervisors of customer service, information and related clerks, Tellers and customer service clerks who work in banks or other financial institutions, Administrative clerks, and Customer service agents in transportation. <u>Example Titles:</u> accounts information clerk; adjustment clerk; appraiser, tourist booth; attendant, tourist information office; bus information clerk; bus schedule information clerk; bus service information clerk; bus transportation service coordinator; call centre agent - customer service; claim clerk, lost or damaged goods; claims clerk - customer service; clerk, customer service; client service clerk; compensation agent; complaints clerk - customer service; courtesy desk clerk; customer information service representative – retail; customer relations clerk; customer satisfaction representative' customer service adviser; customer service agent; customer service assistant; customer service clerk; customer service; hospital information clerk; hotel information clerk; inbound customer service representative; information clerk - customer service; kiosk information clerk; lost-and-found desk clerk; outbound customer service representative; public relations clerk; road transport terminal attendant; service adviser; service consultant ; telephone enquiries clerk; tourist booth attendant; tourist information clerk; tourist information officer.</p>		
<b>NOC2006 6453 – Food and Beverage Servers</b>	<b>G513</b>	<b>6453</b>
<p>Food and beverage servers take patrons' food and beverage orders and serve orders to patrons. They are employed in restaurants, hotels, bars, taverns, private clubs, banquet halls and similar establishments. <u>Example Titles:</u> assistant waiter/waitress - food and beverage services; banquet captain; banquet headwaiter/head waitress; banquet server; banquet waiter/waitress; bar service waiter/waitress; beer server; buffet waiter/waitress; caterer waiter/waitress; chief wine steward; cocktail waiter/waitress; commissary waiter/waitress; dining car steward; dining car waiter/waitress; dining room captain; dining room steward; food and beverage server; headwaiter/head waitress; hotel waiter/waitress; lounge waiter/waitress; mess waiter/waitress; restaurant waiter/waitress; room service waiter/waitress; server - food and beverage services; sommelier; steward - food and beverage services; waiter/waitress; wine server; wine steward; wine waiter/waitress.</p>		
<b>NOC2006 6641 – Food Counter Attendants, Kitchen Helpers and Related Occupations</b>	<b>G961</b>	<b>6641</b>
<p>Workers in this unit group include counter attendants, food preparers, kitchen helpers, food service helpers and dishwashers. Counter attendants and food preparers prepare, heat and finish cooking simple food items and serve customers at food counters. Kitchen helpers, food service helpers and dishwashers clear tables, clean kitchen areas, wash dishes, and perform various other activities to assist workers who prepare or serve food and beverages. They are employed by restaurants, cafes, hotels, fast food outlets, cafeterias, hospitals and other establishments. <u>Exclusions:</u> Street food vendors. <u>Example Titles:</u> airline food assembler; bar helper; bartender helper; bus boy/girl; cafeteria counter attendant; cafeteria helper; caterer helper; cook's helper; dessert maker; dessert preparer; dietary aide; dining room assistant; dining room attendant; dishwasher; dishwashing machine attendant; donut shop attendant; donut shop clerk; drive-in food service attendant; fast-food preparer; fast-food service attendant; food and beverage service runner assistant; food assembler - fast food; food counter attendant; food preparer; food service attendant; food service counter attendant; food service helper; hospital meal attendant; ice cream counter attendant; kitchen helper; lunchroom counter attendant; pot washer; restaurant counter attendant; salad bar attendant; salad maker; sandwich maker; sandwich, silverware cleaner; snack bar attendant; soda fountain attendant; steam table attendant - food services; take-out attendant - fast food.</p>		
<b>NOC2006 6212 –Food Service Supervisors</b>	<b>G012</b>	<b>6212</b>
<p>Food service supervisors, supervise, direct and co-ordinate the activities of workers who prepare, portion and serve food. They are employed by hospitals and other health care establishments and by cafeterias, catering companies and other food service establishments.</p> <p><u>Exclusions:</u> Occupations concerned with supervising waiters/waitresses. <u>Example Titles:</u> cafeteria supervisor, food services; canteen supervisor; catering supervisor; food assembly supervisor; food service supervisor; shift manager, fast food restaurant; supervisor, food services; swing manager, fast food restaurant; unit supervisor - food services.</p>		
<b>NOC2006 6435 – Hotel Front Desk Clerks</b>	<b>G715</b>	<b>6435</b>
<p>Hotel front desk clerks make room reservations, provide information and services to guests and receive payment for services. They are employed by hotels, motels and resorts. <u>Exclusions:</u> Supervisors of hotel front desk clerks. <u>Example Titles:</u> front desk agent; front desk clerk; front office clerk, ;guest service agent; guest service representative; guest services agent; hotel clerk; hotel concierge; hotel front desk clerk; hotel night auditor; hotel receptionist; night auditor – hotel; night clerk; receptionist, hotel; reservations clerk; reservations clerk – hotel; room clerk; room service clerk – hotel; service agent, guests.</p>		

<b>OCCUPATION</b> <i>(listed alphabetically)</i>	<b>NOC-S</b>	<b>NOC</b>
<b>NOC2006 0112 – Human Resource Managers</b>	<b>A112</b>	<b>0112</b>
<p>Human resources managers plan, organize, direct, control and evaluate the operations of human resources and personnel departments, and develop and implement policies, programs and procedures regarding human resource planning, recruitment, collective bargaining, training and development, occupation classification and pay and benefit administration. They represent management and participate actively on various joint committees to maintain ongoing relations between management and employees. Human resources managers are employed throughout the private and public sectors. <u>Exclusions:</u> Labour contract negotiators, Managers of personnel supply or temporary help agencies, Managers responsible for human resources as well as another administrative activity, Senior personnel managers such as vice-president, human resources or director-general, personnel. <u>Example Titles:</u> administrator, human resources; benefits manager; chief, staff relations; chief, staff training and development; chief, staffing; director, employee benefits; director, employment equity; director, human resources; director, human resources development; director, human resources management; director, labour relations; director, personnel services; director, recruiting; employment manager; health and safety co-coordinator; human resources administrator; human resources manager; job evaluation and salary research manager; labour relations director; labour relations manager; language training director; manager, benefits; manager, compensation; manager, labour relations; manager, occupational health and safety; manager, personnel services; manager, staff relations; manager, wage and salary administration; pay and benefits director; pay and benefits manager; pay services director; pensions and benefits manager; personnel administration manager; personnel chief; personnel director; personnel manager; personnel services director; recruiting manager; salary research and administration manager; staff relations chief; staff relations</p>		
<b>NOC2006 6663 – Janitors, Caretakers and Building Superintendents</b>	<b>G933</b>	<b>6663</b>
<p>Janitors, caretakers and building superintendents clean and maintain the interior and exterior of commercial, institutional and residential buildings and their surrounding grounds. Building superintendents employed in large establishments are responsible for the operation of the establishment and may also supervise other workers. They are employed by office and apartment building management companies, school boards, hospitals and other institutions, recreational and shopping facilities, and industrial and other establishments. <u>Exclusions:</u> Cleaners that specialize in one type of cleaning such as window cleaning; Cleaners that only clean and do not do routine maintenance, exterior cleaning, or industrial cleaning; and Supervisors of janitors. <u>Example Titles:</u> airport janitor; airport maintenance worker; apartment building caretaker; apartment building maintenance worker; building caretaker; building custodian; building maintenance worker; building services worker; building superintendent; church caretaker; cleaner, industrial plant; custodian; custodian handyman/woman; heavy-duty cleaner; industrial cleaner; industrial plant cleaner; janitor; live-in caretaker; maintenance man/woman; maintenance worker; school custodian; school janitor; superintendent, building..</p>		
<b>NOC2006 8612 – Landscaping and Grounds Maintenance Labourers</b>	<b>I212</b>	<b>8612</b>
<p>Landscaping and grounds maintenance labourers perform manual work to assist in the construction of a landscape and related structures and to maintain lawns, gardens, athletic fields, golf courses, cemeteries, parks, landscaped interiors and other landscaped areas. They are employed by landscaping and lawn care companies, golf courses, cemeteries, and by landscaping departments of governments and private establishments. <u>Exclusions:</u> Nursery workers (including Christmas tree pruners), Supervisors of landscape and grounds maintenance workers; and Construction labourers. <u>Example Titles:</u> bulb planter; cemetery labourer; cemetery worker;; gardener helper; gardening helper; gardening helper, landscape; golf course labourer; golf course worker; grass cutter; grave digger; greens worker; grounds maintainer; grounds maintenance worker; groundskeeper; groundsman/woman; plant doctor; tree surgeon; landscape gardener helper; landscape worker; lawn mower; lawn-mowing worker; plant-care worker; planter, bulbs; snow shoveller; sod layer; sprayer, trees; transplanter; tree pruner; tree trimmer; plant care worker.</p>		
<b>NOC2006 6661 – Light Duty Cleaners</b>	<b>G931</b>	<b>6661</b>
<p>Light duty cleaners clean the lobbies, hallways, offices and rooms of hotels, motels, resorts, hospitals, schools, office and other buildings, and private residences. They are employed by hotels, motels, resorts, recreational facilities, hospitals and other institutions, building management companies, cleaning service companies and private individuals. <u>Example Titles:</u> airport cleaner; building cleaner; chambermaid; cleaner; cleaning lady; cleaning man/woman; domestic maid; floor cleaner; floor sweeper; guest home cleaner; homemaker helper, hospital cleaner; hotel cleaner; house cleaner; housekeeping aide; housekeeping attendant; housekeeping room attendant; light duty cleaner; lodge cleaner; maid; motel cleaner; nursing home cleaner; office building cleaner; office cleaner; residence cleaner; rest room attendant; rest room cleaner; room attendant; tourist camp cleaner; washroom cleaner.</p>		
<b>NOC2006 6451 – Maîtres d'hôtel and Hosts/Hostesses</b>	<b>G511</b>	<b>6451</b>
<p>Maîtres d'hôtel and hosts/hostesses greet patrons and escort them to tables, and supervise and co-ordinate the activities of food and beverage servers. They are employed in restaurants, hotel dining rooms, private clubs, cocktail lounges and similar establishments. <u>Example Titles:</u> chief host/hostess - food services; dining room host/hostess; host/hostess - restaurant or cocktail lounge; host/hostess, dining room; host/hostess, food service; host/hostess, restaurant; maitre d' maitre d'hôtel; restaurant host/hostess.</p>		

<b>OCCUPATION</b> <i>(listed alphabetically)</i>	<b>NOC-S</b>	<b>NOC</b>
<b>NOC2006 6432 – Purser and Flight Attendants</b>	<b>G712</b>	<b>6432</b>
<p>Airline pursers and flight attendants ensure the safety and comfort of passengers and crew members during flights. Ship pursers attend to the safety and comfort of passengers aboard ships. Airline pursers and flight attendants are employed by airline companies. Ship pursers are employed by tour or cruise boat companies. <u>Exclusions:</u> Occupations concerned with serving food and beverages on trains.</p> <p><u>Example Titles:</u> aircraft flight attendant; airline purser attendant, commissary - air transport; attendant, flight; chief steward, ship; CSD customer service director; director, flight service; director, passenger service; flight attendant; flight purser; flight service director; in-charge flight attendant; in-flight service manager; manager, in-flight service; passenger service director; purser - air transportation; purser - water transportation; purser, airline; ship purser; ship supply officer.</p>		
<b>NOC2006 0631 – Restaurant and Food Service Managers</b>	<b>A221</b>	<b>0631</b>
<p>Restaurant and food service managers plan, organize, direct, control and evaluate the operations of restaurants, bars, cafeterias and other food and beverage services. They are employed in food and beverage service establishments, or they may be self-employed.</p> <p><u>Exclusions:</u> food service supervisors, dieticians, senior managers in food service. <u>Example Titles:</u> assistant manager, restaurant banquet manager; bar manager; beverage service manager; cafeteria manager; canteen manager; canteen service district manager; canteen services manager; catering service manager; dining establishment managing supervisor; dining room manager; fast food restaurant manager; food and beverage service manager; food services manager; restaurant assistant manager; restaurant manager; restaurateur; steward, food services; tea room manager.</p>		
<b>NOC2006 6421 – Retail Salespersons and Sales Clerks</b>	<b>G211</b>	<b>6421</b>
<p>Retail salespersons and sales clerks sell, rent or lease a range of technical and non-technical goods and services directly to consumers. They are employed by stores and other retail businesses and wholesale businesses that sell on a retail basis to the public. <u>Exclusions:</u> Checkers and receiving inspectors, laundry and dry cleaning; Door-to-door salespersons and other non-store retail occupations; Grocery store clerks; Transportation ticket sales clerks; Cashiers; Salespersons that sell mainframe and mini-computers mostly to business customers; and Supervisors of sales clerks. <u>Example Titles:</u> equipment salesperson; car rental agent; car salesperson; car-rental counter representative; clerk, retail sales; clothing salesperson; confectionery sales clerk; convenience store clerk; corner store clerk; customer service sales clerk; department store clerk; gift shop clerk; greeter, sales; rental agent; rental clerk; rental counter representative; rental-shop attendant; sales agent; sales assistant; sales associate; sales clerk; sales consultant; sales greeter; sales order clerk; sales promotion clerk; sales representative; salesperson; shop attendant; shop clerk; store clerk; supplies salesperson; travelling salesperson.</p>		
<b>NOC2006 0621 – Retail Trade Managers</b>	<b>A211</b>	<b>0621</b>
<p>Retail trade managers plan, organize, direct, control and evaluate the operations of establishments that sell merchandise or services on a retail basis. Retail trade managers are employed by retail sales establishments or they may own and operate their own store. <u>Exclusions:</u> Retail sales supervisors; advertising managers; managers in retail establishments responsible for administrative support functions, such as administration and purchasing managers, personnel managers and financial operations managers; and senior managers in retail trade. <u>Example titles:</u> store manager, area manager, art dealer, art gallery manager, department manager, retail assistant manager, assistant manager -travel agency, automobile servicing manager, bakery department manager, bakery manager, retail beer store manager, bicycle shop manager, bookstore manager, branch manager, clothing store manager, coin dealer, concession manager, manager convenience store manager, shop manager, customer service manager, retail department manager, department store manager, concession operator, gas station manager, general store manager, gift shop manager, clothing store manager, liquor store manager, management trainee, retail manager, department store manager, retail sales manager, customer service department manager, retail sales manager, retail service manager, stamp dealer, tour and travel manager, travel agency assistant manager, travel agency manager, variety store manager, video store manager.</p>		
<b>NOC2006 6211 – Retail Trade Supervisors</b>	<b>G011</b>	<b>6211</b>
<p>Retail trade supervisors supervise and co-ordinate the activities of workers in the following unit groups: Retail Salespersons and Sales Clerks (G211), Cashiers (G311), Grocery Clerks and Store Shelf Stockers (G972) and Other Elemental Sales Occupations (G973). They are employed by stores and other retail businesses, wholesale businesses that sell on a retail basis to the public and businesses involved in door-to-door soliciting and telemarketing. <u>Exclusions:</u> Supervisors in technical or specialized sales; and Managers of retail departments or retail sales. <u>Example titles:</u> cashier supervisor; customer service supervisor; delivery person supervisor; department head, retail store; department store supervisor; department supervisor – retail; door-to-door sales supervisor; food store supervisor; grocery clerk supervisor; head cashier; rental service supervisor; retail store department head; retail store supervisor; sales clerk supervisor; sales supervisor; stock clerks supervisor; telemarketing services supervisor; telephone sales clerk supervisor.</p>		

<b>OCCUPATION</b> <i>(listed alphabetically)</i>	<b>NOC-S</b>	<b>NOC</b>
<b>NOC2006 0611 – Sales, Marketing and Advertising Managers</b>	<b>A131</b>	<b>0611</b>
Sales, marketing and advertising managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial, wholesale and e-business sales, marketing, advertising and public relations. They are employed by commercial, industrial and wholesale establishments, marketing and public relations consulting companies and by government departments. Exclusions: Insurance sales or securities sales managers; Sales managers in retail trade; and Senior managers of sales, marketing, and advertising. Example Titles: account manager - sales; advertising account manager; advertising administrator; advertising director; advertising manager; area sales manager; sales and advertising campaign manager; circulation manager; commercial accounts manager; communications director; communications manager; advertising director; external relations director; media relations director; public affairs director; public relations director; regional communications director; marketing division director; sales and marketing distribution manager; information and communications manager; information service manager; marketing manager; media relations manager; package tour sales manager; promotions manager; publicity manager; sales and advertising manager; sales and marketing manager; sales and publicity manager, regional sales manager; web communications manager; web marketing manager; zone manager - sales.		
<b>NOC2006 7413 – Taxi and Limousine Drivers and Chauffeurs</b>	<b>H713</b>	<b>7413</b>
Taxi and limousine drivers drive automobiles and limousines to transport passengers. Chauffeurs drive automobiles and limousines to transport personnel and visitors of businesses, government or other organizations or members of private households. Taxi and limousine drivers are employed by taxi and other transportation service companies, or they may be self-employed. Chauffeurs are employed by businesses, government and other organizations, or by private individuals or families. <u>Example Titles</u> : airport limousine driver; chauffeur; company chauffeur; driver, taxi; driver, taxicab; funeral chauffeur; hearse driver; limousine driver; private chauffeur; taxi driver; taxi owner-operator; taxicab driver.		
<b>NOC2006 5212 – Technical Occupations Related to Museums and Art Galleries</b>	<b>F112</b>	<b>5212</b>
This unit group includes workers who classify and catalogue museum and gallery artifacts, construct and install exhibits and displays, restore, maintain and store museum and gallery collections, frame artwork, and perform other functions in support of curatorial and conservation activities. They are employed in museums and galleries. Picture framers and taxidermists may also be employed in retail settings or may be self-employed. This unit group also includes museum and other interpreters who conduct guided tours. They are employed at art galleries, museums, parks, aquariums, zoos, interpretive centres, botanical gardens, cultural centres, nature sanctuaries, historic and heritage sites and other locations. <u>Exclusions</u> : Museum exhibit designers; Theatre, Fashion, Exhibit and Other Creative Designers; and Conservators and Curators. <u>Example Titles</u> : archaeological technician; art gallery preparator; art gallery registrar; art objects preparator; art restoration technician; assistant registrar – museum; cataloguer, museum objects; chief display officer; chief exhibit officer; \ chief preparator; conservation and restoration technician; conservation technician; curatorial assistant; diorama maker; diorama technician display officer; document restoration technician; exhibit officer; exhibit preparator; exhibit technician; fossil recovery and reparation technician; frame fitter; framer - museum and art gallery; framing technician; head preparator; heritage interpreter; historic site interpreter; historical interpreter; historical site technician; historical village supervisor; historical village technician; history museum interpreter; interpreter; model maker; museum cataloguer; museum technician; nature site interpreter; objects cataloguer; park interpreter; planetarium technician; preparator; restoration technician; recording technician – museum; restoration technician; taxidermist; technical officer – museum.		
<b>NOC2006 6434 – Ticket Agents and Related Clerks (Except Airline)</b>	<b>G714</b>	<b>6434</b>
Ticket agents, cargo service representatives and related clerks (except airline), quote fares and rates, make reservations, issue tickets, process cargo shipment, check baggage and perform other related customer service duties to assist travellers. They are employed by bus and railway companies, freight forwarding and shipping companies, boat cruise operators and other public transit establishments and by travel wholesalers. <u>Exclusions</u> : Travel counsellors selling tickets through retail travel agents; and Supervisors of ticket and cargo agents and related clerks. <u>Example Titles</u> : agent, counter sales; agent, passengers; agent, reservations; agent, tickets; baggage agent (except airline); baggage clerk (except airline); bookings clerk (except airline); bus ticket agent; check-in agent (except airline); client service\ representative; counter clerk (except airline); counter sales agent (except airline); counter service agent (except airline); customer sales and service agent (except airline); customer service agent - bus line; customer service representative; luggage checker (except airline); passenger agent (except airline); railway passenger agent; railway reservations clerk; reservations agent (except airline); reservations clerk (except airline); sales agent (except airline); ship cargo agent; station agent – railway; ticket agent (except airline); ticket and customer service clerk (except airline); ticket and information clerk (except airline); ticket clerk (except airline); transit station ticket agent; transportation agent (except airline).		

<b>OCCUPATION</b> <i>(listed alphabetically)</i>	<b>NOC-S</b>	<b>NOC</b>
<b>NOC2006 6441 – Tour and Travel Guides</b>	<b>G721</b>	<b>6441</b>
<p>Tour and travel guides escort individuals and groups on trips, on sightseeing tours of cities and on tours of historical sites and establishments such as famous buildings, manufacturing plants, cathedrals and theme parks. They also provide descriptions and background information on interesting features. Tour and travel guides are employed by tour operators, resorts and other establishments or may be self-employed. <b>Exclusions:</b> Outdoor sport and recreational guides; Museum guides and historical interpreters; and Managers of tour organizing enterprises. <b>Example Titles:</b> adventure travel site interpreter; bicycle tour guide; boat tour guide; bus tour guide; calèche driver; host/hostess, interpreter, adventure site; local tour guide; sightseeing guide; sightseeing tour guide, tour director; tour escort; tour guide; tourist guide; travel escort; travel guide; walking tour guide.</p>		
<b>NOC2006 0713 – Transportation Managers</b>	<b>A373</b>	<b>0713</b>
<p>Transportation managers (operations) plan, organize, direct, control and evaluate the operations of transportation companies such as railways, airlines, bus lines, municipal transit systems, shipping lines and trucking companies, under the direction of a general manager or other senior manager. Transportation managers, freight traffic plan, organize, direct, control and evaluate companies or departments responsible for the transportation and movement of goods, under the direction of a general manager or other senior manager. They are employed by transportation, freight forwarding and shipping companies and by transportation departments of companies in retail and manufacturing sectors and utilities. <b>Exclusions:</b> Managers of waste disposal systems; Managers in transportation companies who specialize in something other than transportation or traffic; Managers in Engineering, Architecture, Science and Information Systems; and Senior managers in transportation. <b>Example Titles:</b> air freight manager; airline division manager; airline division superintendent; airline express manager; airline fleet operations manager; airline flight schedule design manager; airline manager; airline superintendent; area manager, railway transport; assistant general agent – railway; assistant manager, traffic and transportation; assistant superintendent – railway; assistant traffic manager; assistant transportation manager; bus company manager; corporate transportation manager; current schedule planning manager – airline; director of logistics – transportation; director of operations, transportation; director of traffic; director of transportation; director, flight operations; director, logistics – transportation; director, transportation management; division superintendent, airline; division superintendent, railway; ferry operations manager; ferry superintendent; fleet manager, fleet operations manager, airline; flight operations director; flight operations manager; flight schedule design manager, airline; general agent, railway transport; general traffic manager; general transportation manager; marine operations manager; marine superintendent; operations director, transportation; passenger operations manager, railway; port captain - water transport; rail operations superintendent; rail transport manager; ramp manager – airline; runway manager; ship management operations manager; shipping services manager; shore captain - water transport; transportation and traffic manager; transportation director; transportation manager; travel and relocation department manager; urban transit system manager; water transport manager.</p>		
<b>NOC2006 6431 – Travel Counsellors</b>	<b>G711</b>	<b>6431</b>
<p>Travel counsellors advise clients on travel options and tour packages, make bookings and reservations, prepare tickets and receive payment. They are employed in travel agencies, transportation and tourism firms and hotel chains. <b>Exclusions:</b> Ticket sellers employed in the transportation industry. <b>Example Titles:</b> agent, travel information; booking agent - travel agency; reservation sales agent - travel agency; tourist information counsellor; travel agent; travel centre counsellor; travel consultant; travel counsellor; travel information agent; travel specialist; visitor information counsellor.</p>		

**Source:** National Occupational Classification - Statistics (NOC-S) 2006

## Appendix IV- Selected results of CTSA 2006 for GDP and tourism employment (2012)

**Table AIV-1: GDP and Tourism Employment for Tourism and Non-Tourism Industries, Canada 2006**

	Labour Income	Net Income of Un-incorporated Business	Other (3)	GDP at Basic Prices	Number of Jobs	Labour Compensation per Job	GDP per job	Tourism's Share of Total Industry's GDP (2)
<b>Industry</b>	<b>Millions of dollars</b>			<b>('000)</b>	<b>dollars</b>	<b>dollars</b>	<b>(%)</b>	
<b>Tourism activities:</b>								
Air transportation	2,042.8	-	1,195.1	3,237.9	40.5	50,500	79,900	71.8
Railway transportation	131.4	-	627.6	759.1	2.8	46,600	268,800	12.5
Water transportation	103.7	0.2	50.8	154.6	1.9	4,800	81,600	10.3
Bus transportation	360.4	1.0	129.7	491.1	10.1	35,800	48,600	28.2
Taxicabs	48.4	43.1	38.1	129.6	4.6	19,800	28,000	13.3
Vehicle rental	214.6	2.0	531.6	748.2	5.9	36,700	126,600	19.6
<b>Total Transportation</b>	<b>2,901.3</b>	<b>46.3</b>	<b>2,572.8</b>	<b>5,520.5</b>	<b>65.9</b>	<b>44,800</b>	<b>83,800</b>	<b>29.5</b>
Hotels	2,843.9	45.7	1,630.7	4,520.3	101.4	28,600	44,600	60.7
Motels	523.9	8.5	301.1	833.5	19.3	27,700	43,300	67.6
Camping	291.8	54.1	62.6	408.5	13.1	26,400	31,200	77.0
Other accommodation	374.4	26.7	179.3	580.4	26.8	15,000	21,700	54.7
<b>Total Accommodation</b>	<b>4,034.1</b>	<b>135.0</b>	<b>2,173.7</b>	<b>6,342.7</b>	<b>160.6</b>	<b>26,000</b>	<b>39,500</b>	<b>62.3</b>
<b>Food and Beverage Services</b>	<b>2,721.1</b>	<b>122.0</b>	<b>475.0</b>	<b>3,318.1</b>	<b>153.3</b>	<b>18,600</b>	<b>21,700</b>	<b>17.2</b>
<b>Recreation and Entertainment</b>								<b>19.5</b>

	1,459.2	122.3	565.4	2,146.9	64.3	24,600	33,400	
Travel Services	1,383.4	48.9	406.2	1,838.5	38.9	36,900	47,300	88.8
<b>Total Tourism Industries</b>	<b>12,499.1</b>	<b>474.5</b>	<b>6,193.1</b>	<b>19,166.7</b>	<b>483.0</b>	<b>26,900</b>	<b>39,700</b>	<b>31.3</b>
Other Industries (4)	4,127.8	213.8	2,123.4	6,465.0	123.4	35,200	52,400	--
<b>Total Tourism Activities</b>	<b>16,626.9</b>	<b>688.3</b>	<b>8,316.5</b>	<b>25,631.7</b>	<b>606.5</b>	<b>28,600</b>	<b>42,300</b>	<b>--</b>
<b>Non-Tourism Activities</b>								
Agriculture, forestry, fishing and hunting	8,338	1,094	12,255	21,688	397	23,800	54,700	
Mining and oil and gas extraction	20,241	207	96,125	116,573	206	99,500	566,800	
Utilities	8,456	8	22,747	31,211	108	78,100	287,900	
Construction	58,251	9,882	19,391	87,524	1,189	57,400	73,700	
Manufacturing	109,933	487	72,256	182,676	1,881	58,800	97,200	
Wholesale trade	44,993	946	27,696	73,636	860	53,500	85,700	
Retail trade	49,889	4,381	17,856	72,127	1,899	28,600	38,000	
Transportation and warehousing	33,848	2,752	17,465	54,065	714	51,300	75,700	
	<b>Labour Income</b>	<b>Net Income of Un-incorporated Business</b>	<b>Other (3)</b>	<b>GDP at Basic Prices</b>	<b>Number of Jobs</b>	<b>Labour Compensation per Job</b>	<b>GDP per job</b>	
Information and cultural industries	21,119	250	24,009	45,377	372	57,600	122,200	
Finance, Insurance, Real Estate & Leasing	66,878	37,782	143,228	247,888	1,090	96,100	227,600	
Professional, Scientific And Technical Services	44,625	7,888	10,215	62,727	994	52,900	63,200	
Administrative And Support, Waste Management And Remediation								

Services	23,543	2,283	6,338	32,164	777	33,300	41,500
Educational Services	1,674	931	337	2,942	96	27,300	30,800
Health Care And Social Assistance	15,512	13,691	4,733	33,937	565	51,800	60,100
Other industries (1)	219,466	3,486	41,243	264,194	4,949	45,100	53,400
<b>Total non-tourism activities</b>	<b>726,765</b>	<b>86,069</b>	<b>515,894</b>	<b>1,328,729</b>	<b>16,095</b>	<b>50,600</b>	<b>82,600</b>
<b>Total Economy</b>	<b>743,392</b>	<b>86,750</b>	<b>524,211</b>	<b>1,354,353</b>	<b>15,583</b>	<b>53,300</b>	<b>87,000</b>
<b>of which: Business sector</b>	<b>560,382</b>	<b>86,750</b>	<b>493,084</b>	<b>1,140,215</b>	<b>13,508</b>	<b>48,000</b>	<b>84,500</b>
<p>(1) Including government and non-profit institutions.</p> <p>(2) Percentage of an industry's GDP that comes from satisfying tourism demand. "Total industry's GDP" is a broad variable as it also includes freight activities.</p> <p>(3) Includes other operating surplus, other taxes on production (excluding taxes on products) and other subsidies on production</p> <p>(4) Based on TRSAMF2008, now includes Pleasure boats &amp; sporting craft</p>							

Source: CTSA 2006. Unpublished Excel worksheet Table 2 – GDP and Employment for Tourism and Non-Tourism Industries, Canada, 2006. Release date: January 5, 2012.

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