



Tourism & Hospitality
Emergency Recovery



Labour Force Survey: Summary Report November 2021



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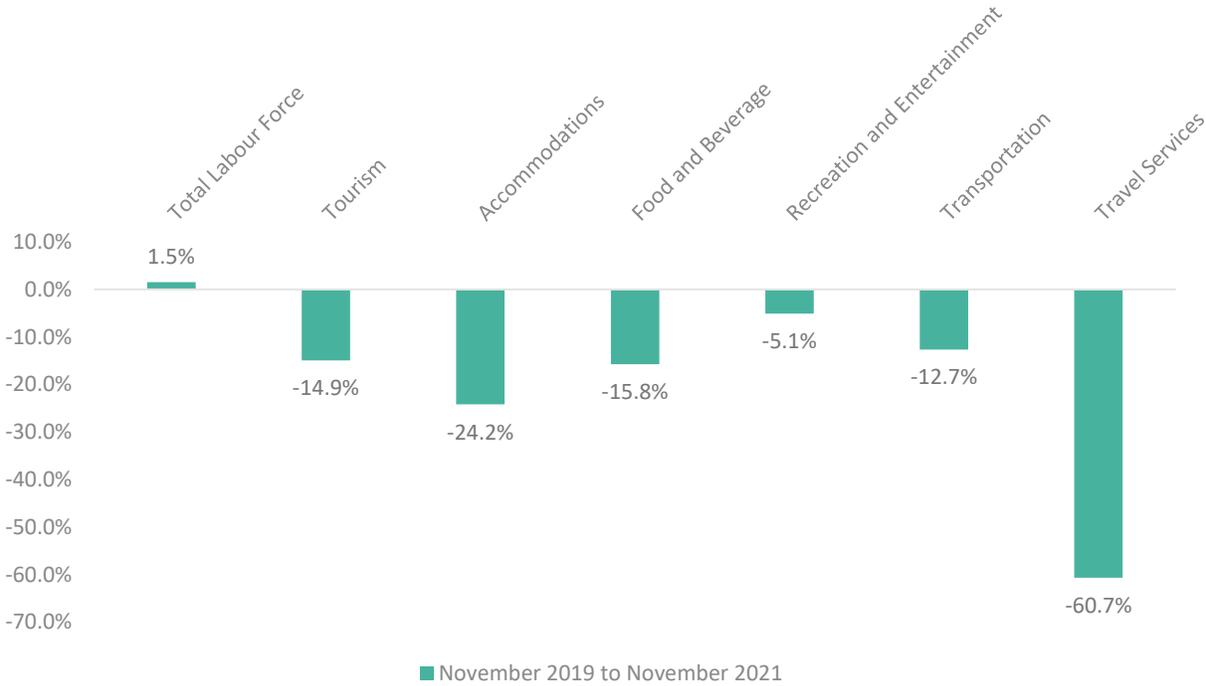
Tourism Employment Remained Suppressed in November

Overall, total employment in Canada had recovered to pre-pandemic levels, but employment within the tourism sector continues to be significantly suppressed.

Employment Gain/Loss by Industry Group

Total seasonally unadjusted employment in Canada was up 1.5% compared to November 2019 (see Figure 1). However, tourism employment remains down 14.9%, following a small increase in tourism employment from October to November. Among the five tourism industry groups, recreation and entertainment employment is down the least (-5.1%). Employment remains the most suppressed in industry groups that rely on international travel for a significant amount of demand. Notably, the travel services group has seen the most significant employment drop by 60.7% since November 2019.

Figure 1: Employment Gain/Loss by Industry Group ¹



¹ Statistics Canada, Labour Force Survey, customized tabulations

Vacancies

The number of job vacancies in Canada's accommodation and food service sector reached 196,050 in September 2021 (see Figure 2). The number of vacancies was up 25.1% from August 2021.

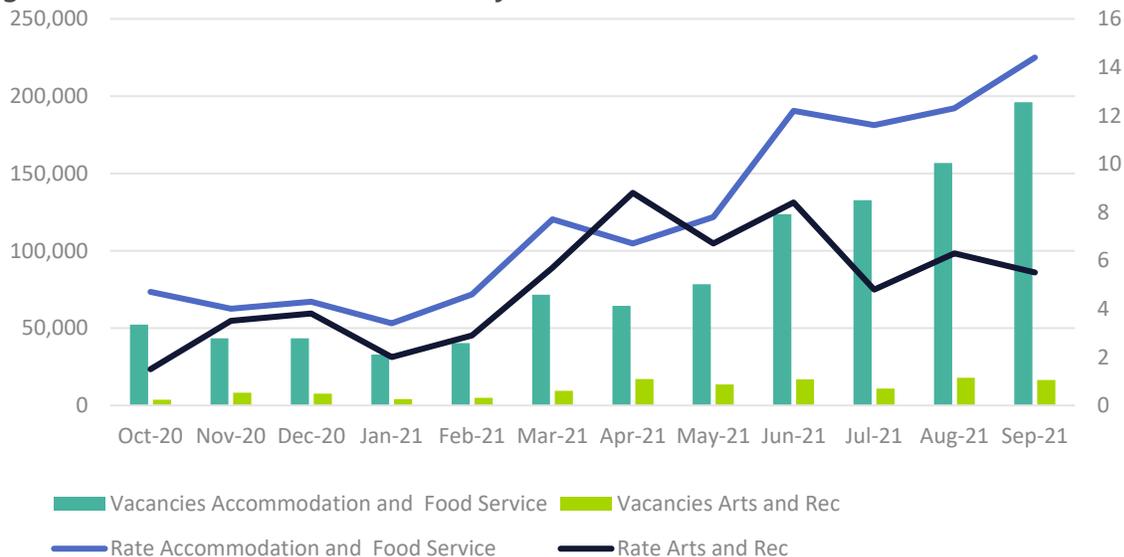
The number of job vacancies has been fluctuating in the arts, entertainment, and recreation sector (see Figure 2). In September 2021, the number of job vacancies was 16,380, slightly down from August 2021.

The vacancy rate in accommodation and food services reached 14.4% in September. In the first month that borders reopened to all international travellers, more than 1 in 10 positions in that sector went unfilled.

The vacancy rate in the accommodation and food service sector has consistently been higher than in the arts, entertainment, and recreation sector since May. The vacancy rate in the accommodation and food service sector reached historically high levels at 14.4% in September. While the vacancy rate in the accommodation and food service sector has been increasing since July, the vacancy rate in the arts, entertainment, and recreation sector has decreased from its peak in April.

As of September 2021, a large gap has emerged between the vacancy rates of the two sectors (accommodation and food service sector: 14.4%; arts, entertainment, and recreation sector: 5.5%).

Figure 2: Job Vacancies and Job Vacancy Rate in Tourism Related Sectors²



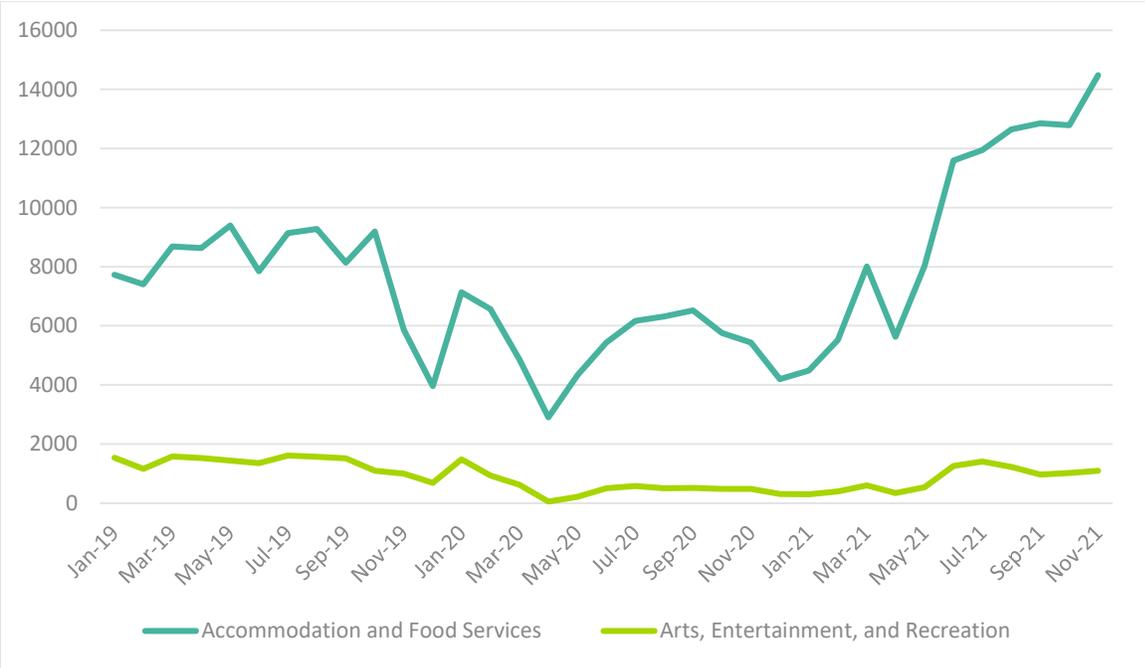
² Statistics Canada. Table 14-10-0372-01 Job vacancies, payroll employees, and job vacancy rate by industry sector, monthly, unadjusted for seasonality

Demand in Tourism Related Sectors

The total number of job postings in the accommodation and food services sector has been rising significantly since April, following a trough that lasted through most of 2020. Since starting a sustained recovery in May 2021, job postings in the accommodation and food services sector continue to increase, reaching 14,480 in November 2021. This was a growth of 146.7% compared to November 2019 and a growth of 166.5% compared to November 2020.

With a few fluctuations, the number of job postings in the arts, entertainment, and recreation sector was down slightly compared to the first nine months of 2019. In November 2021, there were 1,098 job postings in this sector, which is 9.3% higher than pre-pandemic levels and 125% higher than in November 2020. While the number of job postings in arts, entertainment and recreation has not increased dramatically, overall, the demand for workers in that sector is recovering to pre-pandemic levels.

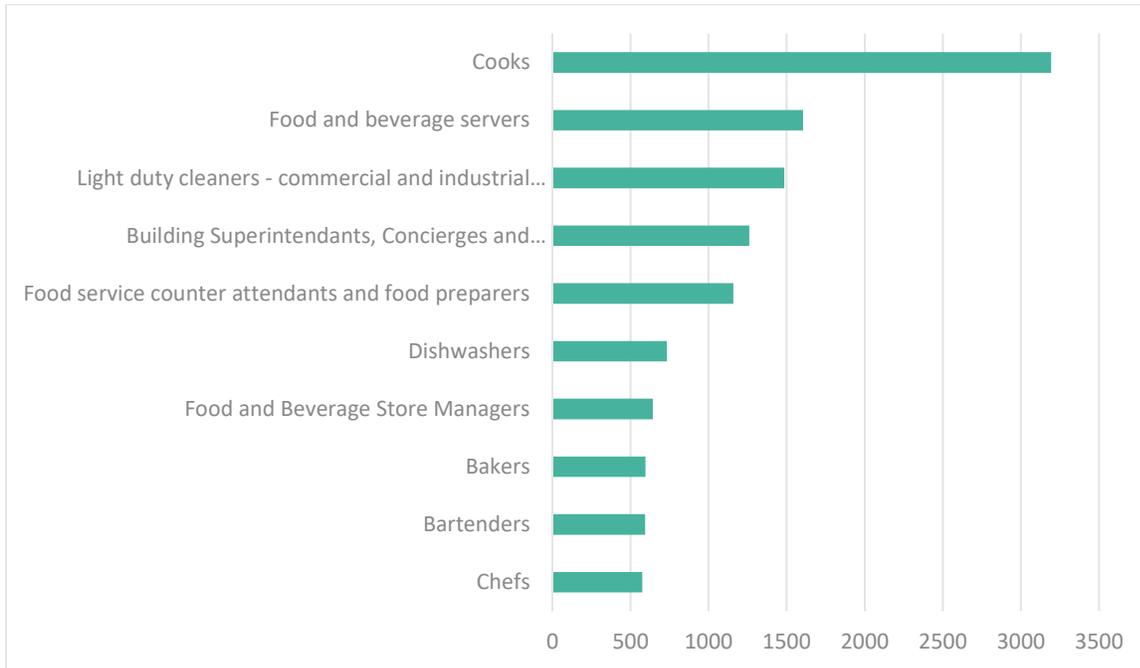
Figure 3: Number of Job Postings



Demand by Occupation

The ten tourism occupations that were highest in demand in November 2021 are shown in Figure 4. Cooks took the lead with 3,194 job postings, followed by food and beverage servers (1,605) and light duty cleaners (1,484).

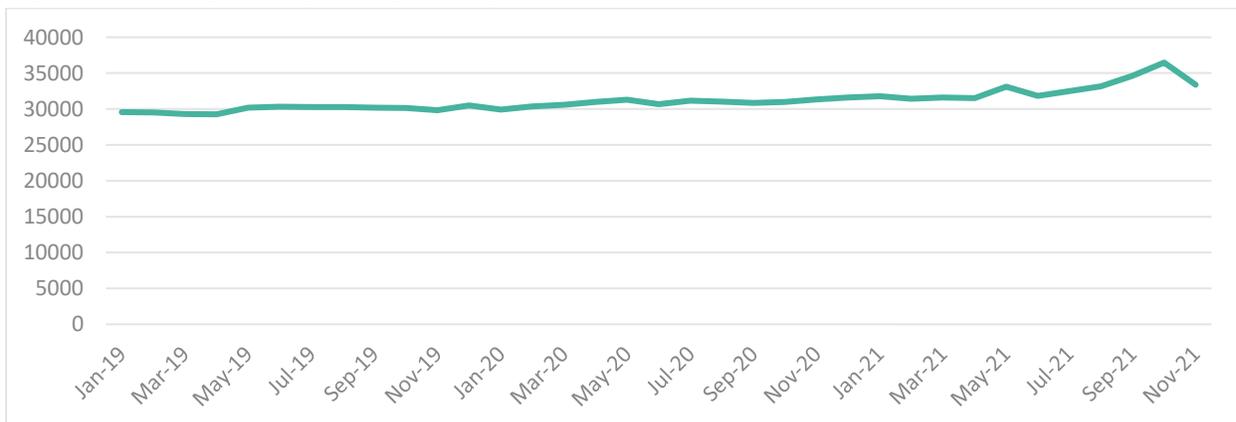
Figure 4: Number of Job Postings by Occupation



Salary

The average salary in the tourism industry varies from occupation to occupation. Take light duty cleaners as an example, the average salary had an upward trend since January 2019 (see Figure 5). In October 2021, it reached its peak at \$36,469. However, in November 2021, the average salary offered decreased by \$3,094, returning to the August level. Please refer to the Tourism & Hospitality Recovery Dashboard to view the average salary trends for other tourism occupations.

Figure 5: Average Salary of Light Duty Cleaners



Change in the Tourism Labour Force

The tourism labour force is the number of employed tourism workers, and former tourism workers, who have been unemployed for less than a year and are actively seeking work. The data in Figure 6 is seasonally adjusted to account for the seasonal swings in employment within the tourism sector. The tourism labour force has grown since the spring. In 2021, the labour force peaked in August, then decreased in September and October before growing slightly in November. Compared to its size pre-pandemic, the tourism labour force has shrunk significantly. In November 2021, it was 15.1% smaller than in November 2019. In November, there were approximately 330,000 fewer employed or formerly employed tourism workers than there were one year prior. The Canadian economy has returned to pre-pandemic levels of unemployment. Even considering increases in the total number of people working or seeking work in Canada (see below), many former tourism workers have moved to other sectors of the economy. This will make it increasingly difficult for tourism businesses to replace lost workers in the coming months.

Figure 6: Change in Tourism Labour Force – Seasonally Adjusted³



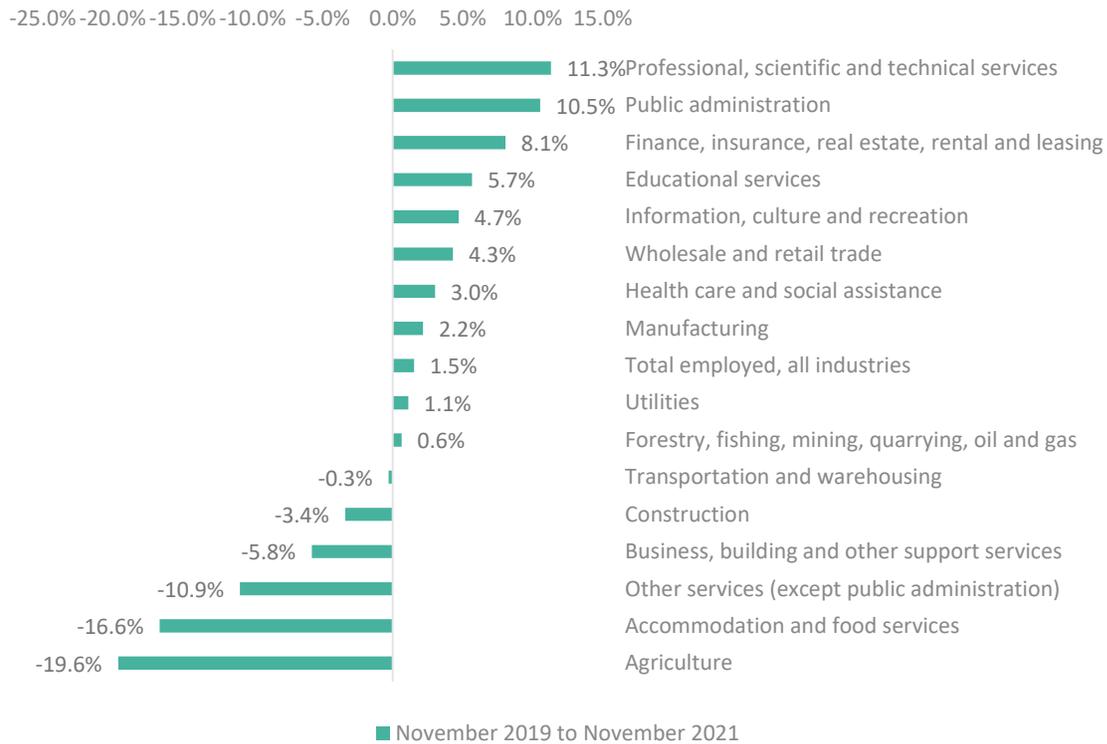
Change in Employment by Industry

Overall, seasonally unadjusted employment in Canada had recovered to pre-pandemic levels. Seasonally unadjusted employment in Canada was up 1.5% from November 2019 (see Figure 7). As of November, employment had grown in professional, scientific and technical services (11.3%), followed by public administration (10.5%), and finance, insurance, real estate, rental and leasing (8.1%) compared to 2019. Employment in the information, culture and recreation employment has grown 4.7%, while accommodation and food services employment had dropped 16.6% since November 2019. Several non-tourism sectors such as construction and business, building and other support services

³ Adapted from Statistics Canada, Labour Force Survey, customized tabulations

have also not replaced all the employment lost during the pandemic. The agricultural sector has undergone a significant decrease in employment (-19.6%).

Figure 7: Employment Change by Industry November 2021 to November 2019 (seasonally unadjusted) ⁴



Total Labour Force Growth (Seasonally Adjusted and Unadjusted)

Although employment has returned to pre-pandemic levels, it is important to remember that the labour force has also grown since that time. There are more employed workers than there were two years ago, but more people are also looking for work. Since November 2019, the seasonally unadjusted labour force had grown by 326,500 (see Figure 8). Compared to February 2020, the labour force was elevated more significantly, with a growth of 428,000.



Seasonally adjusted data, which accounts for regular changes in the labour force, such as the addition of student workers in the summer, shows an increase of 284,000 workers since February 2020 and 344,400 workers since November 2019.

⁴ Statistics Canada. Table 14-10-0022-01 Labour force characteristics by industry, monthly, unadjusted for seasonality (x 1,000)

Figure 8: Labour Force Growth (seasonally adjusted and unadjusted)⁵



Travellers in Canada

The number of international travellers arriving in Canada fell slightly in October due to a decrease in travellers from the United States. In September, 518,223 travellers arrived in Canada from the United States. In October, 488,616 U.S. travellers came to Canada—a decrease of 5.7%. The number of international travellers from countries other than the United States increased slightly from 153,439 in September to 160,736 in October. Compared to October 2019, the number of international arrivals was down 73.2%. While this is a relative improvement compared to the months prior to August—when arrivals were often down 95% or more—it still shows that international travel demand is very weak. In addition, there is a risk that the omicron variant will restrict international arrivals further in 2022.

Figure 9: International Tourist Arrivals in Canada by Month⁶



⁵ Statistics Canada. Table 14-10-0287-01 Labour force characteristics, monthly, seasonally adjusted and trend-cycle, last 5 months & Statistics Canada. Table 14-10-0017-01 Labour force characteristics by sex and detailed age group, monthly, unadjusted for seasonality (x 1,000)

⁶ Statistics Canada. Table 24-10-0041-01 International travellers entering or returning to Canada, by type of transport