

Statistics Canada Review - The Outdoor Tourism Sector

The outdoor industry currently lacks sufficient data to accurately report and support the impact and scale of its services. This gap includes areas such as workforce classification and analysis, the broader economic influence of outdoor sector products and services on tourism-adjacent jobs and industries and proper documentation and understanding of outdoor infrastructure. While Statistics Canada has made notable efforts to collect detailed micro-level data in areas such as tourist activity tracking, many aspects of the outdoor sector are still categorized under broad labels like leisure, recreation, sport, and amusement. This lack of distinction makes it difficult to highlight the sector's unique contributions.

The Work Force

Classification of the Outdoor Industry Professional

Outdoor guides and tourism professionals in the realm of outdoor pursuits are categorized under multiple classifications across various metrics. Within the National Occupational Classification (NOC) system, they primarily fall under two categories: [64322 - Outdoor sport and recreational guides](#) and [54100 - Program leaders and instructors in recreation, sport and fitness](#). Statistics Canada acknowledges the seasonal nature of many outdoor sport and recreation guide positions under the 64322 classification. However, there is a lack of detailed data capturing the true breakdown of these jobs and their seasonal patterns. Similarly, while many positions classified under 54100 also follow a seasonal work cycle, this reality is not recognized in the current National Occupational Classification 2021 1.0 version.

The Labour Force Survey

While the Labour Force Survey seeks to collect data on employment and unemployment rates it fails to ask questions that cater to the more erratic schedule of an outdoor guide. While it does offer up the option of selections of 'seasonal layoffs' it fails to consider that people may be working seasonally including a job in the summer and a different one in the winter, which may or may not be in different occupational classifications. While the Labour Force Survey is conducted monthly and that helps to represent seasonal employment it may not be effective in

accounting for a constant shift in outdoor sector employees moving back and forth between NOC 54100 and 64322. While the NOC version 1.0 clearly separates the distinction between something such as a guide versus an instructor these terms in the outdoor industry can often be interchangeable in some cases and many outdoor professionals work in both categories throughout the year or even at once. Being able to identify how much of the workforce is shifting between the 2 categories throughout a calendar year and its seasons would provide a more clear understanding of how many employees are working in the industry compared to how many jobs are being worked/filled.

Consistent Unemployment and Wages Data

There is also a significant lack of data reported from the Labour Force Survey for the 64322 Outdoor Sport and Recreational Guides Classification even just looking at the results over the last year. This is in respect to aspects of full-time and part-time employment rates, unemployment rates and wage rates. However, Classification 54100 Program Leaders and Instructors in Recreation, Sport and Fitness does seem to present a full set of data every month. Consistent reporting on employment is crucial to the outdoor sector when considering the seasonality of the work. A guide may face unemployment in the 'off season' which typically but not always will be in the fall and spring time (winter as well depending on region). If data is not being collected and reported consistently through high and low or off seasons there is no way to accurately analyze the size and strength of the work force and its gaps. It is important to note that the Annual [Survey of Service Industries: Amusement and Recreation](#) does account for and represent seasonal business closures but it does not break down industry characteristics and goods and services categories narrow enough to serve the outdoor sector appropriately. Having this data would allow organizations such as the Outdoor Council of Canada and employers to better advocate and support industry workers through seasonal unemployment and industry wage standards.

Workforce Summarized

Considering the outdoor workforce is both seasonal and many outdoor professionals are making a living made up of multiple part-time jobs, the outdoor sector may not be accurately represented through data collection tools such as the Labour Force

Survey. This can lead to questions from the outdoor tourism industry such as: Is the number of employees in the outdoor sector accurately recorded and reported? Are employment and unemployment rates accurately recorded and reported when considering factors like the seasonal nature of the outdoor sector? Are employees in the outdoor sector and their positions accurately classified? Knowing that very similar outdoor sector jobs can fall under both the 64322 and the 54100 classification codes further complicates whether or not workforce data in the outdoor sector as a whole is being recorded and reported in its entirety. Overall current data collection on the labour workforce in Canada is not collecting data that caters to jobs, and hours typically seen in the outdoor sector.

Outdoor Tourism Activities Versus Services Provided

Recent data collected on [Travel by Canadian residents in Canada and abroad](#) shows that nearly 50% of Canadian travelers are traveling in Canada with a trip purpose of Holiday, Leisure or Recreation which is a broad category that outdoor recreation typically falls under. The National Travel Survey (NTS) does offer specific questioning in respect to travel or tourism activities that addresses the more narrow scope of outdoor tourism and pursuits. It is great that these numbers are broken down into what percentage of travelers participated in each activity but there is currently a lack of data on where the outdoor workforce plays a role in this. For example the activity selection features activities such as but not limited to: sightseeing, visiting historic sites, wildlife viewing or birdwatching, visiting a national, provincial or nature park, boating, canoeing or kayaking, camping, hiking or backpacking, fishing, hunting, cycling, snowmobiling, downhill skiing or snowboarding, xc skiing and other. This gives a clear idea and a great range of what travelers seeking outdoor pursuits are looking for and participating in but there is a lack of data on what support the outdoor industries workforce provides for travelers to pursue these activities. There is currently no way to know whether or not these activities were guided or advised by an industry professional, and how they heard about them. It is also complicated by the worker classifications that these activities can utilize. For example skiing and snowboarding could be done independent of a resort, with an instructor or a guide or it can include any combination of the 3. A backcountry ski guide while classified as a guide may also be providing teaching or instruction to a certain degree. The broad scope of the outdoor industry and those

who work in it is very fragmented in how data is collected and reported. Not only are the professional job classifications not catering to the scope of activities Statistics Canada is surveying and identifying but there is simultaneously a gap and an overlap when trying to connect the two. Knowing whether or not these activities were ‘guided, instructed or pursued independently’ makes a difference in how the outdoor industries workforce is identified and outlined. A visitor to a National or Provincial Park could be pursuing multiple outdoor pursuits independently or guided but their planning and execution may also be supported by visitor centre staff, public transit workers, parking staff, and more. Sightseeing as another example is an activity people can select that they participated in while visiting that lacks clarity on the support of the outdoor industry in this pursuit. Sightseeing is a very broad term or activity for visitors to say they participated in and it may often be perceived as an independent activity despite the possibility and potential for the experience to be enriched by doing it with a guide. While it does seem to be a more complex sector to collect and analyze data on, it is still very important to understand the operations and specifically the workforce volume for the industry to be accurately represented, funded and supported.

Outdoor Tourism Sector Relationships

Jobs Generated by Tourism

[Jobs Generated by Tourism Data](#) does display what tourism provides in terms of other available jobs by the industry to a degree. It also raises the question if it encompasses the full scope of this. This set of data shows how many jobs tourism generates when it comes to categories such as travel, accommodation, food and beverage and even an ‘other’ labeled category. Industries like food, beverage and accommodation are often explicitly mentioned in these statistics while outdoor recreation is rarely listed and its umbrella terms like recreation and leisure are typically last to be mentioned or not explicitly mentioned at all. While what services are encompassed in the other category is not clear. For example small ‘mountain towns’ where people do reside but also bring in a lot of tourism may have an inflated level of services that exceed the need for the population but is necessary to keep up with incoming visitors. There is an understanding that these destinations offer more demand and work for industries such as accommodations and food and beverage. A

nature based tourism region might see an increase of other industries aside from things like food and beverage, but including the need for additional health services such as doctors or a better equipped or larger hospital. The jobs generated by tourism data does address this but it does not go to the depth that would really show a comprehensive report on what jobs are directly a result of outdoor based tourism in the area. A more accurate representation of how far the outdoor sector really reaches in terms of generating and providing jobs in other industries would be beneficial in properly addressing the real economic and social impacts of the outdoor industry and its reach into generating the need for jobs in other industries in any given region.

The Pursuit of Outdoor Activities and other Tourist Activities

There is also a struggle to identify any connections between tourism activities and outdoor tourism activities. Numbers reported through the NTS are clear however, it does not speak to the relationships between each of these activities. In the NTS results there is clear percentages of activities visitors are participating in and it can be inferred that even though we see greater numbers of visitors participating in the activity of shopping compared to most of the outdoor pursuits listed previously, the activity of shopping in a place like Banff National Park is likely not most visitor's main reason for visiting. A clearer understanding of a visitor's main drive or attraction to traveling in Canada may show evidence to support that the outdoor tourism sector has a greater impact on other tourism activities. In general there is a lack of data on the concept of despite low numbers in outdoor pursuits how many other categories like shopping are receiving much higher participation due to the surrounding outdoor pursuits tourism.

[Jobs, hours worked and income in tourism industries](#) data provides a fantastic breakdown of jobs in the tourism industry by transportation (air and other), accommodation, food and beverage services, recreation and entertainment, and travel services. Again though the large category of recreation and entertainment does not serve the outdoor sector well in terms of relevant and applicable data.

Other Considerations

Infrastructure

While there is some very relevant data on what kind of public spaces are available to Canadians as seen in [Inventory of core public infrastructure assets](#) there is still a lack of breakdown when considering the outdoor sector. There are 6 categories represented in this data that fall under the ‘culture, recreation and sports facilities’ umbrella. These 6 include: total ice facilities, indoor pools, total multi-purpose buildings, total arts and culture facilities, Community centres (senior and youth centres) and total outdoor facilities. Despite numbers of total outdoor facilities being 3 times higher than the other 5 categories combined there is no breakdown into what these outdoor facilities specifically are. While the data mentioned here is broken down into public organizations it still lacks depth on the type of outdoor spaces and uses that they are oriented around and how the outdoor workforce fits into these spaces. More information on the nature of these spaces would allow the outdoor sector to evaluate where their resources are going currently and how they can be allocated moving forward.

Diversity of Metrics [Destination Canada Launches Wealth & Wellbeing Index](#)

It is clear that data focused solely on economic driven outcomes does not highlight the value of recreation and entertainment that outdoor pursuits will typically fall under. Other organizations have begun measuring the success and impact of the tourism industry by other metrics which may be valuable for the outdoor tourism sector moving forward. For example, Destination Canada has outlined a new set of metrics to understand the value of tourism in the greater picture of Canada. Despite also not separating the outdoor industry from the rest of recreation and leisure activities, the idea of using new metrics that highlight other beneficial areas other than economics can better show the scope and impact of outdoor tourism as a whole.

Summary

Statistics Canada has successfully represented the outdoor industry in respect to narrowing down the scope and variation of activities as outlined in the National Travel Survey. This comprehensive breakdown offers great insights to activities

travelers are taking part in instead of all recreational activities falling under one umbrella term or category. A main issue however with the outdoor industries representation within Statistics Canada data is the fragmentation of the workers classification within the field. A more cohesive or intertwined and specific set of job classification(s) could make it easier to categorize and analyze the data on outdoor professionals. Overall the outdoor sector could benefit and be better represented in these statistics by a further breakdown of some of the data. Categories of leisure, recreation, sport, amusement etc that the outdoor sector falls under are accounted for in a very broad sense. With these broad categories the outdoor sector can not effectively separate and evaluate data exclusive to them. More detailed data collection and analysis on the outdoor sector within the recreation categories would allow workers and the greater industry to be better represented and served.

Summary of Key Points

- The National Occupational Classification that has outdoor professionals in 2 working categories ([64322 - Outdoor sport and recreational guides](#) and [54100 - Program leaders and instructors in recreation, sport and fitness](#)) complicates the outdoor sector getting accurate data that is both narrow enough to highlight only the outdoor sector and in a single clear set of data points.
- It is challenging for the outdoor tourism industry to get accurate employment numbers when the workforce is small and many work seasonally rather than a more standard job that the labour force survey caters to (lacking consistent data collection).
- The National Travel Survey does a great job at collecting data exclusive and specific to the outdoor industry. If other data relevant to the industry was collected in this manner the outdoor sector would have a much better idea of workforce size, needs and how to support workers.
- There is a need to deepen the data on what drives tourism. Is outdoor based recreation contributing more to other tourism adjacent industries and activities than we currently have data for?
- The outdoor sector often falls hidden in categories broadly named things such as: leisure, recreation, amusement and sport. It is challenging to extract outdoor specific data from these.
- A better understanding and documentation of how many outdoor spaces the outdoor sector has to operate in would be beneficial to understand the reach of the industry.
- Exploring metrics other than economic contribution could paint a better picture on the wider impacts of tourism on Canada.