millierdickinsonblais

Regional Tourism Workforce & Training Strategy

Tourism Northern Ontario, Regional Tourism Organization13 A, B & C

FINAL REPORT

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Executive Summary

Northern Ontario is a vast and vibrant landscape, featuring great expanses of natural beauty, balanced by quaint cities and towns. In a region of Ontario so dependent on tourism for economic progress, the skills and aptitudes of locals affiliated with the industry are on display for the travelers who are passing through, whether for business or pleasure. Consequently, low skills can reflect poor quality and have adverse impact on communities trying to prosper through a tourism-related economy.

The tourism sector is a large and vital component of Northern Ontario's economic reality. Evaluating the extent to which skills required by this industry are being acquired by workers, assessing the availability of programs and resources designed to improve or facilitate skills development, and understanding where gaps in skills development and training exist between those that require them, is essential to industry competitiveness.

Between January and March of 2014, Tourism Northern Ontario, engaged Millier Dickinson Blais Inc. to develop a Regional Tourism Industry Workforce Strategy. The strategy is the content of this document, and it was developed to strengthen the region's capacity to address current industry skills/training deficiencies in the tourism sector.

To inform the strategy, the consulting team conducted the following research:

- **Situational Analysis** - to assess the current demographic trends of Northern Ontario's 10 Census Divisions
- **Consultation** - consisting of semi-structured interviews with multiple stakeholders, surveys with tourism operators or employers, surveys with tourism sector employees, and focus groups with multiple stakeholders
- **Tourism Labour Projections** – involved labour projections across 108 tourism-related occupations between 2013 and 2023 for all of Northern Ontario

This research culminated with the identification of the core-skill gaps and training requirements of the tourism industry. These skill areas and training requirements are rationalized in the consultation summary in the full report but are identified and consolidated into the figure below. Those training areas in red and followed by an asterisk have been identified as areas with training gaps.

Employment fundamentals

- **Employability Skills and Soft Skills including:** communication skills, personality and enthusiasm, and appearance/first impressions*
- **Literacy and numeracy training**

Basic Employee Tourism Training

- **"Service excellence" with emphasis on customer service training**
- **"In good hands" Health, food and safety**
- **WHIMIS – workplace hazardous materials information system**
- **Smart Serve**

Advanced Employee Tourism Training

- **Customer Service Training***
- **Regional Awareness Training***
- **Cross-sector promotional training***

Management/Business Owner Training

- **Business planning / small business management**
- **Succession planning and mentoring training***
- **"Good boss" and Mentoring training***
- **Product Development / product quality assurance / renewing product offerings**
- **Website Development / Social Media Training**

With these training gaps in mind, the report concludes with a training strategy framed by a series of **goals** and associated **recommended actions.**

These goals and recommended actions were informed by consultation with the project steering committee through the use of an on-line survey designed to determine the ranking ascribed to each goal and action item. The order in which these Goals and Actions are presented reflects the results of the survey, placing the most urgent Goal as number one and others following accordingly.

The Strategy's goals are:

- Goal #1: Foster awareness and knowledge of available resources, programs, and training opportunities
- Goal #2: Foster partnerships between educational organizations, community employment training programs, and industry
- Goal #3: Increase training capacity to meet the needs of operators

- Goal #4: Advance Skills Development and Training to meet the needs of Tourism Operators and their Staff
- Goal #5: Support operators to address human resource needs and future planning
- Goal #6: Promote employer investment in on-the-job training and skills development for employees

As TNO moves forward to address these goals, it is important to recognize the sheer number of organizations across Northern Ontario which is already well positioned to support TNO in operationalizing this strategy. The report highlights a number of organizations which may be positioned to fund, facilitate, champion or support these goals and supporting actions. In this regard, the complexities and political nuances associated with the funding and training landscape in Northern Ontario pose a clear challenge to isolating likely partners. Therefore, instead of identifying partners to support each of the action items, it is recommended that TNO initiate discussions with these potential partners to identify who is in a position to champion or support these actions based on their capacity and mandate. Pursuing this collaborative approach will be the most effective means of implementing the strategy.

1 Introduction

As global tourism indicators demonstrate, rising skills demand among employers and a recognized need for skills development among job seekers across all skill levels and career pathways, this global reality is manifested in Canada's tourism occupations at multiple scales. Northern Ontario is a vast and vibrant landscape, featuring great expanses of natural beauty, balanced by quaint cities and towns. In a region of Ontario so dependent on tourism for economic progress, the skills and aptitudes of locals affiliated with the industry are on display for the travelers who are passing through, whether for business or pleasure. Consequently, low skills can reflect poor quality and have adverse impact on communities trying to prosper through a tourism-related economy.

The tourism sector is a large and vital component of Northern Ontario's economic reality. Evaluating the extent to which skills required by this industry are being acquired by workers, assessing the availability of programs and resources designed to improve or facilitate skills development, and understanding where gaps in skills development and training exist between those that require them, is essential to industry competitiveness.

Between January and March of 2014, Tourism Northern Ontario, engaged Millier Dickinson Blais Inc. to develop a Regional Tourism Industry Workforce Strategy.[1] The strategy is the content of this document, and it was developed to strengthen the region's capacity to address current industry skills/training deficiencies in the tourism sector.

The strategy is the content of this document, and was developed to meet the following goals:

- Strengthen capacity to address current industry skills/training deficiencies in the tourism sector through the identification of tourism workforce skills shortages and relevant training needs
- Identify skill deficiencies and ensure training needs are addressed through the identification of emerging opportunities in workforce training, including identification of new and innovative training delivery
- Provide proactive strategies to meet future tourism workforce needs through improved workforce attraction and retention and developing and delivering programs and industry training specific to future tourism workforce needs

The report culminates with the presentation of an industry centered Action Plan and Training Implementation Strategy.

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[1] This report has been supported by the Ministry of Agriculture, Food and Rural Affairs by providing access to the EMSI Analyst tool. Nevertheless, the views expressed in this report are the views of Millier Dickinson Blais Inc. and do not necessarily reflect those of the Ministry.

1.1 Report Approach

Oftentimes, one cannot see the forest for the trees, and this proverb applies to quality research and analysis. For this reason, the early chapters of the report are direct in their presentation of information, with the finer details provided in the document's appendices.

This report is broken down into the following components:

Chapter 2.0 - Situational Analysis – assesses the current demographic trends of Northern Ontario's 10 Census Divisions. The second half of the chapter addresses global, national, and provincial trends and programs associated with skills development and training, culminating in a discussion of Northern Ontario's general relationship to existent programs and services and some key questions to be addressed in the remainder of the report.

Chapter 3.0 – Consultation Summary – presents the methodology and combined results of stakeholder consultations, undertaken using semi-structured interviews with multiple stakeholders, surveys with tourism operators or employers, surveys with tourism sector employees, and focus groups with multiple stakeholders. The chapter classifies results thematically and examines them across all forms of consultation performed.

Chapter 4.0 – Summary of Tourism Labour Projections – presents the results of labour projections across 108 tourism-related occupations between 2013 and 2023. Tourism-related occupations account for 40% of the total labour force in Northern Ontario, but are expected to decline by 2,579 jobs by 2023. Further, a greater number of people are expected to retire than are expected to replace them.

Chapter 5.0 – Needs and Gap Analysis – presents details pertaining to identified skill and training delivery gaps and a series of training delivery considerations. The former involves identifying gaps along four levels of training, employment fundamentals, basic employee tourism, advanced employee tourism, and management or business owner training. The latter addresses the subjects of industry awareness, labour force requirements, complexity of training landscapes, collaboration and coordination efforts, effective training delivery, and capacity building.

Chapter 6.0 – Tourism Workforce Training Strategy – presents the overall goals and specific action items of the action plan and implementation strategy.

In addition, the following appendices address components of the above chapters, respectively, and to a greater degree of analysis and detail.

Appendix A – Demographic Assessment – provides and overall assessment of population dynamics of Northern Ontario by district-level descriptive data, containing various tables and graphs.

Appendix B – Consultation Findings – provides a section-by-section overview of the four types of consultation performed; semi-structured interviews, employer/operator surveys, employee surveys, and focus groups. Each method is addressed in detail in a separate chapter within the appendix.

Appendix C – Situation Analysis – provides the fine-grained statistical details relevant to the tourism sector and tourism-related occupational categories as they pertain to Northern Ontario.

Appendix D – Tourism Labour Supply and Demand Projections – demonstrates the back-casting and fore-casting aspects of the economic model utilized to capture labour supply and demand projections for Northern Ontario between 2013 and 2023.

Appendix E – List of Tourism-Related Occupations by NOC – displays the 108 job categories identified as affiliated with the tourism sector, according to each North Occupations Code (NOC) in tabular format.

Appendix F – Northern Ontario Tourism training Inventory – in tabular format which includes the name of institution, programs, descriptions, training level, duration, and delivery method, the various training programs available to Northern Ontario are presented.

2 Situational Analysis

2.1 Summary of Demographic and Socio-Economic Context for Northern Ontario

This section provides a summary of the demographic and socio-economic analysis of Northern Ontario. Throughout this discussion, emphasis is placed on trends with relevance to the tourism sector. This summary attempts to generalize those observable trends affecting Northern Ontario at large. The complete demographic assessment presented in the appendix provides for a more thorough description of specific trends affecting Northern Ontario's 10 Census Divisions or Districts.

Population and Population Growth - In 2011, Northern Ontario had a population of 700,280 inhabitants, a decrease of 1.7% from 2006, when the population was 712,037. This stands in contrast to the provincial increase in population by 4%, from 12,160,282 inhabitants in 2006 to 12,651,795 in 2011. Overall, the population is shrinking in Northern Ontario, whereas Southern Ontario continues grow.

Population by Age Structure - Residents of Northern Ontario are becoming older, with shrinking population cohorts at a regional level across most age categories until the age of 55 and older. The only cohort below 55 that saw growth between 2006 and 2011 was the 25 to 34 year old cohort, with an increase of 0.3%. While there is an increasing amount of people who fall into the age cohorts above the age of 55, there are fewer and fewer people below that age, suggesting that younger cohorts are leaving Northern Ontario.

Median Personal Income - Between 2005 and 2010, changes to personal income appear significant, with an average increase in annual income of 53.9% for Northern Ontario. Each of Northern Ontario's districts has shown an increase in annual income, with Northern Ontario's median income increasing by $12,956 between 2005 and 2010.[2]

Education - Overall more people in Northern Ontario are completing high school than ever before. From 2006 to 2011, there has been an average increase of 5.1% across Northern Ontario. For those reporting having obtained a high school degree or equivalent, there was only marginal increase during this period of 0.3%. Similarly, there were no significant changes to the proportion of people obtaining apprenticeship or trade certificates.

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[2] While these numbers may appear rather positive, a word of caution must be offered regarding a major change in the way in which census data was collected starting in 2011. In effect, the median income data for the National Household Survey was collected voluntarily, and this may have introduced a bias to the result. While there may well be increases in individual income between the tax years of 2005 and 2010, the extent to which these measures can be reliably used for inferential purposes is uncertain.

The largest changes to education levels are evident in the number of people who have college or other non-university certificates or diplomas and in those who obtained a bachelor's degree or higher. With the discussion of changing demographics and a shrinking workforce population, the fact that those residents of Northern Ontario are on average increasing their levels of education may be promising for the tourism sector.[3]

Overall Labour Force Trends - With unemployment rates in all of Northern Ontario at 8.5% in 2006 and 9.6% in 2011, there is a growing proportion of the population that is out of work. During this period, the employment rate fell by 1.2% as did the participation rate. These employment statistics may be related to the demographic shifts noted above.

Of the total labour force in Northern Ontario in 2011, 92.5% were employees of some form (full-time, part-time, temporary, etc.), while the remaining 7.5% were self-employed.

Tourism Labour Force Trends - In collaboration with the project steering committee, the consulting team developed a list of 108 occupations that may be considered tourism-related occupations. The complete list of these occupations is presented in the appendix. Figure 1 presents a summary of the number of workers employed in the tourism sector across Northern Ontario's 10 Districts in 2011. The column furthest to the right, entitled "Northern Ontario," provides the total level of employment for the entire region. These totals provide a useful benchmark against which to measure each district's relative share of tourism based employment. Greater Sudbury and Thunder Bay are Northern Ontario's leaders in terms of overall tourism-related employment. As of 2011, Greater Sudbury supported 28,320 tourism-related jobs, while Thunder Bay supported a further 26,375. On the other hand, Manitoulin, Rainy River, and the Sudbury District were the smallest sites for tourism employment.

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[3] At the same time, consideration needs to be given to the point raised above about a possible sampling bias inherent to the 2011 National Household Survey. The survey has sampling bias towards those people with higher levels of education as they were more likely to fill in the voluntary National Household Survey component of the census in 2011, and those with less education were less likely to do so.

FIGURE 1 TOTAL TOURISM EMPLOYMENT ACROSS NORTHERN ONTARIO'S 10 DISTRICTS BY NOC, 2011

Occupations by National Occupational Classification (NOC)	Algoma	Cochrane	Greater Sudbruy	Kenora	Manitoulin	Nipissing	Rainy River	Sudbury (District)	Thunder Bay	Timisk'ing	Northern Ontario
0 Management occupations	1,525	935	2,175	535	125	1,065	235	200	1,910	260	8,965
1 Business, finance and administration occupations	4,055	2,790	7,015	1,980	500	3,250	650	545	5,945	965	27,695
2 Natural and applied sciences and related occupations	605	235	760	405	-	505	50	-	840	35	3,435
3 Health occupations	85	80	165	35	45	115	-	-	135	30	690
4 Occupations in education, law and social, community and government services	115	45	145	65	25	125	15	25	235	-	795
5 Occupations in art, culture, recreation and sport	530	280	835	185	90	385	35	30	615	115	3,100
6 Sales and service occupations sub total	**10,895**	**7,205**	**14,985**	**5,030**	**760**	**8,055**	**1,470**	**1,870**	**14,325**	**2,570**	**67,165**
62 Retail sales supervisors and specialized sales occupations	290	145	330	70	-	245	-	50	385	50	1,565
63 Service supervisors and specialized service occupations	1,400	915	2,285	625	140	895	285	210	2,290	330	9,375
64 Sales representatives and salespersons - wholesale and retail trade	1,950	1,350	3,615	755	95	1,875	225	255	2,845	525	13,490
65 Service representatives and other customer and personal services occupations	2,245	1,295	2,495	890	55	1,040	210	305	2,625	370	11,530
66 Sales support occupations	1,595	1,210	2,235	940	130	1,455	205	535	1,875	575	10,755
67 Service support and other service occupations, n.e.c.	3,415	2,290	4,025	1,750	340	2,545	545	515	4,305	720	20,450
7 Trades, transport and equipment operators and related occupations	975	1,020	1,950	545	180	1,055	135	210	1,895	460	8,425
8 Natural resources, agriculture and related production occupations	390	130	290	285	50	260	60	-	475	85	2,025
Total Tourism Occupations	**19,175**	**12,720**	**28,320**	**9,065**	**1,775**	**14,815**	**2,650**	**2,880**	**26,375**	**4,520**	**122,295**

Source: Statistics Canada. 2011 National Household Survey. Adapted by Millier Dickinson Blais Inc.

2.2 Skills Development and Training in the Tourism Sector

While the focus of this research is Northern Ontario's tourism sector, it is understood that the region does not operate within a vacuum and must be considered within the context of global, national, and provincial tourism sector influences. To that end, this section addresses what is happening in skills development and training at multiple levels. It starts at the broadest strata, at a global level, and incrementally becomes more detailed, ending in a discussion of Northern Ontario's interaction with provincial and national programs and services. The final section summarizes the overall context of skills development and training and poses some questions that inform the direction of following chapters.

2.2.1 Skills Development and Training around the World

There is a global need to enhance education and skills training across the tourism sector. In a survey of the top 20 tourist-destination countries around the world, the United Nations World Tourism Organization (UNWTO) observed that skills training and development was the most common area of concern for industry members, ahead of working conditions, employment promotion and entrepreneurship, economic and social development, and decent work.[4] In addition, the Organization for Economic Cooperation and Development (OECD) observed in 2012 that there was continuing pressure in the global tourism sector to enhance skills and training, even when professionals considered themselves up-to-date on the latest competencies required to successfully perform their duties.[5] This pressure is felt at all levels of employment from entry-level through to management; it's even felt by students currently enrolled in tourism-related schooling. For example, there is pressure to keep curriculum current in hotel and restaurant schools, but issues such as instructor-to-student ratios, facilities, and new equipment all extend operating costs, having an effect on the extent to which students are engaged in cutting-edge practices and skills development. Thus, for the tourism industry, the OECD recommends a greater role for governments in shaping the training and skills development agenda. Consequently, according to the UNWTO, efforts are underway in public service sectors around the world to enhance training programs and resources, with Canada being among the global leaders.

2.2.2 Skills Development and Training in Canada and Ontario

A primary goal of Industry Canada's 2011 tourism strategy is to promote skills development in the tourism industry."[6] Accordingly, the Canadian Government has committed most notably through Human Resources and Skills Development Canada's (HRSDC) *Sector Council Program* (SCP)' pushing for industry-driven certification programs and occupation standards. In addition, HRSDC has provided support to under-represented groups for skills development and apprenticeship grants to several sub-sectors of the tourism industry such as students completing cooking school or hospitality programs.

But what is Canada doing to promote skills development and training among Canadians already employed in the tourism sector? The SCP's push for certification and standardization has filtered into national programs such as the Canadian Tourism Human Resources Council's (CTHRC) *emerit*™ Skills Development and Certification program. Based on collaborative work between Industry Canada, the CTHRC, and industry sector representatives, the program is designed to provide cutting-edge skills development and certification through an online service to professionals already working in the tourism industry who possess a minimum amount of working hours in a specific sub-sector. Most programs end with an online multiple-choice examination; however, for management-level certifications, there is also an on-the-job practical

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[4] UNWTO. 2010. "Questionnaire on Tourism and Employment: Overview of Results." p.3-4

[5] OECD. 2012 "OECD Tourism Trends and Policies, 2012

[6] Industry Canada. 2011."Canada's Federal Tourism Strategy: Welcoming the World." p.20

evaluation component. One program of note, the Aboriginal Tourism Business Guide, is designed to help "[Aboriginal] business operators to develop, market, and manage their tourism operations."[7]

In Ontario, tourism occupies a variety of geographic scales from local to province-wide. Resources are available for businesses and individuals working in its various sectors. Knowing where to go to access or learn about skills development and training opportunities is a critical challenge for businesses and workers.

In the tourism industry, many legal matters of owning or operating a business fall under a mix of provincial and federal jurisdictions. To help tourism-related business operators in Ontario make sure they are aware of their legal obligations and rights, the Tourism Industry Association of Ontario (TIAO) provides training via e-learning in a webinar format so that business operators can stay on top of the latest legal developments. Through these resources, managers and operators are provided with the tools to successfully navigate the legal landscape, which could make all the difference in the success or failure of a tourism-related business.

The Ontario Tourism Education Corporation (OTEC), a registered not-for-profit whose mission is to provide education, offers extensive education programming targeted more directly at employees. It provides training and human resource development across tourism-related sectors and is the provincial administrator and certifying body for *emerit* occupational standards and certification programs. In addition to administering the *emerit* portfolio on behalf of CTHRC in Ontario, OTEC also administers a range of front-line and management training programs, including the Service Excellence Series. OTEC works directly with industry, as well as through secondary, post-secondary and community employment training networks.

While much workforce skills development is handled by OTEC in coordination with *emerit*, there are other forms of training offered by the Province, but these apply to areas of mandatory certification. For instance, Ontario's Alcohol and Gaming Commission has a certification program for people in the hospitality industry called Smart Serve, consisting of an online or in-class training session about responsible drinking and its relationship to the hospitality sector in which the applicant must obtain a passing grade of 80 percent to receive a certificate[8]. Certification is mandatory within 60 days of beginning employment for any employee who serves alcohol at an establishment, and it is also mandatory for proprietors. The Ontario Ministry of Economic Development, Trade, and Employment offers a mandatory certification program for its Accessibility Standard for Customer Service, applicable to any private or public organization that deals with the public.[9] These forms of training and certification exist to ensure that businesses and employees are aware of their roles and

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[7] EmeritTM. n/d. "Aboriginal Tourism Business Guide," http://emerit.ca/category/aboriginal-tourism-business-guide.

[8] Smart Serve Ontario. n/d. "About Smart Serve," https://www.smartserve.ca/smart-serve-ontario.

[9] Ontario Ministry for Economic Development, Trade and Employment. n/d. "Customer Service Standard," http://www.mcss.gov.on.ca/en/mcss/programs/accessibility/customerService/.

obligations as they relate to provincial legislation. The province does not directly provide skills training or development specifically to the tourism sector. Instead, working closely with partners such as OTEC and its network of public and private colleges, the province supports a wide array of tourism based programming.

Collectively, Ontario, OTEC, and TIAO, issued the "Ontario Tourism Workforce Development Strategy 2012-2017," listing a "high performance workforce" as one of its four strategic directions, relying heavily on standards and training development and accessibility at multiple levels of the industry, from community to provincial-level stakeholders.[10] In the same document, an OTEC survey of Ontario tourism businesses from 2012 found that 71% of respondents had allocated budgets toward workforce development, with *skills training* topping the list of specific workforce development activities they engaged in.[11]

2.2.3 Skills Development and Training in Northern Ontario

Tourism Northern Ontario (RTO 13) has worked with *emerit* and OTEC to provide resources to its stakeholders regarding skills training and development. According to RTO13's *Destination Development Plan Implementation Toolkit*, a SWOT analysis conducted of sector stakeholders identified workforce development priorities of Federal and Provincial Governments as existing strengths of the tourism industry in the region. The analysis likewise noted that capacity building programs from local stakeholders were well suited to continue to help workforce development[12]. However, the same toolkit also observed that existing certification programs were "under-recognized and under-utilized" and noted a general ignorance of skills development and capacity building opportunities by practitioners and business operators.[13] The findings highlight a gap between skills training and development resources and sector-awareness. While the toolkit identifies the need to "[increase] awareness of existing tourism-related certifications and credentials,"[14] this need currently exists only as a goal, and a strategic plan for implementing the action has yet to be developed.

In 2001, Ontario's Ministry of Tourism and Culture released an assessment framework for regions, townships, and cities to conduct self-assessments of their competitive positions relative to tourism. Over the following 10 years, numerous Premier-Ranked Tourist Destination reports were released by participants from across the province. In the past, a collection of individuals came together to assess tourism in the North of Superior Tourism Region (now a part of RTO13's

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[10] Province of Ontario, OTEC, and TIAO. 2012. "Ontario Tourism Workforce Development Strategy 2012-2017." p.3.

[11] Ibid.p.17.

[12] Tourism Northern Ontario. 2013. *Destination Development Implementation Toolkit*, http://tourismnorthernontario.com/documents, p. 6.

[13] Ibid, p. 7-8.

[14] Ibid, p. 28.

13C region), isolating a need for advanced training in the tourism sector, especially across sectors.[15] For example, it noted that while programs for training in restaurant service were offered such as Super Host and Smart Serve—which help to advance skills, competency, and customer service practices—there were areas for improvement of knowledge of regional tourism options. In other words, despite options to maximize the quality of service itself, servers were not aware of things that visitors could do in the area, illustrating room for workforce development in expanding their knowledge of related tourist sectors. As such, some training programs do not appear to take into account the ecology of the tourist sector in general and the various cross-cutting linkages the sub-sectors may share. Thus, even where skills development and training resources exist and are utilized, there may be limited communication across related sectors and lack of awareness of related sectors. One drawback of the Premier-Ranked program is that no attempt was made to assess the aggregate at a broad level in order to find deeper commonalities.

At a regional level, there is both a need for continued skills development and training within specific sectors as well as across the various sectors. This enhancement of the industry as a whole will allow it to move in a more unified and collaborative direction.

2.2.4 Summary of what is Happening

In conclusion, there is a global need for skills development and training, and Canada is a leader in prioritizing this dimension of the tourist industry. The province of Ontario engages with organizations such as OTEC and *emerit* to advance certification and standardization in the tourism sector. At the regional level, research shows that training and skills development are already well developed local assets; however, they are often under-utilized or under-appreciated by industry. Further, there may be disconnect across tourism's various sub-sectors. Numerous questions therefore emerge as to the resilience, popularity, and applicability of skills development and training linkages with those in the industry wishing to grow and maintain their competitiveness. Key questions that emerged through this research process that will be addressed in the following chapters include:

- How aware are operators of the training opportunities available to them and their employees?
- How aware are employees of the most effective ways to remain competitive in the tourism job market?
- What is being done by Regional Tourism Organizations, associations, and councils to assure linkages in skills development and training are bridged with employers and employees?
- What opportunities are available to Regional Tourism Organizations, associations, and councils to strengthen these linkages?

[15] North of Superior Tourism Region. 2008. Premier-Ranked Tourist Destination Final Report: Vision for Our Region.

3 Consultation Summary

3.1 Introduction

To address the questions of the previous chapter regarding employee and employer awareness of and linkages to skills development and training opportunities, numerous stakeholder groups were consulted through surveys, focus groups, and one-on-one semi-structured interviews. Detailed results of these methods of consultation are available in Appendix B – Consultation Results.

This chapter provides an overview of the dominant themes and observations which emerge from the consultations conducted. Following a brief explanation of the methodology of each engagement activity, the remainder of the chapter addresses emergent themes and observations, prior to summarizing the results in a conclusion.

Methodology

Four methods of consultation were employed to a wide cross-section of stakeholders associated with the tourism industry. These four approaches are each reviewed briefly in turn.

First, direct person-to-person interviews were conducted over the telephone with 18 participants, lasting 30 to 60 minutes each. The semi-structured interviews were divided into two broad themes: operators/employers in the tourism sector and trainers/service providers associated with learning and skills development (including trainers, employment service organizations, or not-for-profit groups). The interviews ran from March 10th through 20th, 2014.

Second, the project group collaborated with RTO13 to develop an employer survey totalling 27 questions that was hosted online through Survey Monkey and analyzed with Microsoft Excel. The survey was solicited by Tourism Northern Ontario among tourism-affiliated employers in Northern Ontario. Participation in the survey was voluntary, with 163 employers completing it between late January and early March, 2014. Respondents answered questions related to hiring needs, skills and knowledge gaps among staff, human resource needs, implementing training, and company profiles.

Third, the same list of employers was also asked to promote a separate survey directed at employees. This survey was designed to identify skills and knowledge gaps, preferred training delivery, current knowledge of the industry, and an employer profile from the perspective of employees. A total of 29 individuals completed the 23 question employee survey through Survey Monkey. This survey was available from late January through early March 2014.

Lastly, focus groups were conducted with stakeholders via Adobe Connect, a software program for hosting virtual-meetings. The focus groups separately addressed the three broad catchment areas of Sault-Ste. Marie, Sudbury, and

Thunder Bay. The focus groups convened on March 4th, 2014 and were attended by a total of 20 people across the three areas.

Moving Forward

The following discussion highlights the most critical themes to emerge from the consultation findings. The reason for presenting these themes is twofold. First, they inform the context of the current state of tourism training, delivery, access, and gaps across Northern Ontario, from the perspective of the consultation participants. Second, these themes inform actions designed to address tourism industry training needs.

3.1.1 Lack of industry awareness and understanding of training and associated benefits

There is a perceived lack of awareness and understanding of the types of training available to operators and their staff. This gap in knowledge further extends to the value of training and associated credentials across the industry. To this end, interviewees suggested, “Beyond any one type of programming or training, we need to demonstrate the value of certain accreditation, certification, and training to employers.”

There is broad-based support for the need to develop and promote the value proposition of what training means for employers and their staff. This value proposition should answer the question, “What is in it for the employer to send their employees for training?” By the same token, it is equally important to educate employers on the value of certification and to encourage employees themselves to actively participate in training opportunities.

3.1.2 Communication and technological challenges

The existing communication channels and feedback mechanisms linking industry with educators and trainers are viewed, by industry insiders and educators, as generally inadequate. This is concerning given the consistent efforts by members of both groups to ensure an open dialogue and meaningful relations. While this speaks to the wide-spread disconnect between industry and training providers, it also underscores the persistent challenge of ensuring up-take of tourism-related programming and training on the part of employers and their staff. Simply put, Northern Ontario faces consistent engagement issues, especially with those owner/operators who are nearing retirement.

Another challenge is communication across different segments of the sector. In this regard, operators may choose to function in relative isolation, which limits their grasp of broader industry trends and challenges. Different tourism sub-sectors tend to maintain their silos, discouraging creative promotional activities such as bundled packages among several complimentary businesses.

The sector's demographic realities also pose challenges to rolling out new programming, especially programming that relates to the internet or new technologies. It was noted by several interviewees that older owner operators have been doing things the same way for decades and are often reluctant to change. This lack of technological up-take was also identified by the Ontario Tourism Workforce Development Audit as a key barrier to utilizing technology to support remote training delivery. The audit noted, "online courses, web-based workshops and self-directed training can all contribute to broader accessibility for training and development of staff. In addition, technology can support the industry in sharing and accessing information and resources".[16] It should be further noted, however, that geographic isolation can result in low connectivity, so it is not always age or lack of technological expertise preventing operators from tapping into online resources.

3.1.3 Tourism Training Areas

The overriding objective of this study and its collective consultation efforts was to identify the core training requirements of the tourism industry. This sub-section highlights specific skill and training requirements as identified by employers, employees, and industry experts. The first two skill areas are not exclusive to the tourism industry, but they were nonetheless identified as fundamental skills to working in the tourism sector. The subsequent skill areas are more specific to the required needs of tourism operators and their employees.

1. **Employability skills and soft skills -** Universally, these skills were emphasized by operators and key stakeholders. When asked to identify factors that were important when recruiting staff, employers placed the greatest importance on "communication skills," "personality & enthusiasm," and "appearance/first impressions." Several interview participants echoed the sentiment: "You hire for attitude and train for skills." Employers generally realize that gaps in technical skills can be learned on the job, whereas soft skills are often difficult and onerous to teach.

   In a recent report, the Canadian Council of Chief Executives reinforced the importance of these soft skills by identifying them as the number one evaluation tool for potential entry level hires. Accordingly, those who may have strong technical skills are ending up unemployed or underemployed, lacking the ability or opportunity to develop these essential employability skills. Therefore, it is critical to address the skill gaps in this area to strengthen the quality of the tourism sector's front line and entry level staff.

2. **Literacy and numeracy training** – To a lesser extent, interviewees suggested the labour pool supporting the tourism sector's entry level positions require adult literacy and numeracy training.

[16] Tourism Industry Association of Ontario and OTEC, Ontario Tourism Workforce Development strategy Project: Audit Report 2012, January 2012.

Tourism specific training requirements:

The following programs and credentials were emphasized by all operators and stakeholders as being fundamental for most entry level employees in the tourism sector. Notably, the majority of training provided by employers only satisfies the mandatory training requirements by law. Therefore, the gaps in staff training typically fall outside of the following areas:

- Service excellence with emphasis on customer service training
- "In good hands" Health, food and safety
- WHIMIS – workplace hazardous materials information system
- Smart Serve

Advanced Tourism Training:

The next series of skill or training areas are designed to hone employee skills such that front line workers become ambassadors for the industry.

1. **Customer Service Training –** Polished customer service skills were deemed critical to employee development. This training would involve how to interact with customers, regardless of position or job-role. There is a perception on the part of employers and industry insiders that the standardized forms of customer service training are typically insincere and seem to fail in their objective of imparting the true value of customer service.
2. **Regional Awareness Training –** Front line staff should be knowledgeable about regional tourism assets. This employee training is fundamental to support a well-rounded experience for visitors.
3. **Cross-sector promotional training –** Not only should employees be aware of regional assets, but they should be able to effectively promote complimentary businesses. This cross promotion can improve the visitors' experience and bolster the potential economic impact of each visitor.

Management / Business Owner Training:

1. **Business planning / small business management –** Interviewees underscored the reality that many, "operators are focused on the experience and product, but fail to appreciate the 'million' other things that are required to run and sustain a successful business." Therefore, a "Small Business 101" course is required to ensure operators have a firm grasp of the business fundamentals required to sustain their business. Employers ranked this area highest with respect to their needs. They cited business planning, accountancy, budgeting, and financial management as the skills they would most like to upgrade.
2. **Succession planning and mentoring training –** There is a need to support older and/or 'burned out' operators to sell their business. Training operators to identify and mentor promising employees to take over their business

is vital to the continued vitality of the tourism sector. FedNor is identified as a logical partner to support such training initiatives.

3. **"Good boss" and mentoring training –** Human resources management training was identified as being required by many operators. Programming in this area should focus on what operators should look for in staff and succession planning, along with how operators renew and reward their best employees. In a similar vein, they need Human Resource training to support the increase in capacity within this sector and to reward "star staff," This could be supported by effective mentoring programs.
4. **Product development / product quality assurance / renewing product offerings –** Long-standing operators can be slower to adapt to online marketing and bookings influenced by technological updates and new product developments. User friendly and accessible training in this area was identified as a need by employers and industry insiders alike.
5. **Website/social media skills –** Operators, employees, and industry insiders recognized the importance of internet based communications to support tourism offerings. Website development and ongoing updating along with social media based marketing are no longer technically onerous tasks. These types of skills are now considered fundamental to most tourism based businesses.

3.1.4 Facilitating awareness and easing navigation of available training options

A dominant theme heard throughout the consultation streams was the expression of frustration toward the complexity of navigating the various websites and portals associated with skills development and training. Many respondents seemed overwhelmed or frustrated with the enormity of information.

In light of this, there was a call for access support to relevant training options. Two such solutions include:

- **A comprehensive online tourism-related training web page –** This webpage should contain a series of direct links to relevant training programming, describing types of training available through training institutions and other training providers. Using this direct link approach will reduce site-maintenance as information is accessed from the provider sites.
- **An annual tourism-related training calendar** – This tool should be created and distributed across the sector with an emphasis on events lasting fewer than five days. The calendar would allow for potential users to plan ahead and systematically attend relevant training programs. Alternatively, operators may plan to have staff attend particular training opportunities by regularly reviewing upcoming events well in advance. Ideally, the information in this calendar would include the trainer or training provider, the intended audience, the purpose of the training, and any pertinent logistical details. The tourism training calendar could be an "open" webpage that identified partners could access to update with relevant opportunities.

- This form of communication is viewed as the most efficient and effective means of ensuring buy-in from regional training providers and municipally based organizations.
- TNO could provide this calendar strictly with tourism programming identified, but if shared in an edit enabled format, partnering organizations could also integrate their own training and programming. This functionality would require an approval system to ensure only relevant training is being shared.

3.1.5 Is TNO best positioned to facilitate or co-ordinate training initiatives?

When asked this question, the interview participants voiced diverging opinions. The following conclusions may be drawn from these discussions:

- Tourism training delivery and training delivery in general across Northern Ontario is complex and nuanced. Moreover, there are a myriad of organizations already well entrenched in this space.
- Training organizations welcome collaborative relationships to improve training delivery and best leverage funding dollars.
- TNO is a relatively new organization with limited broad-based brand recognition. Many training organizations across Northern Ontario are struggling to understand the role and mandate of TNO as it relates to training.
- Given TNO's mandate, it is potentially well positioned to identify and communicate training opportunities on an ongoing basis as well as facilitate the delivery of training where gaps are identified; however, there is a danger of TNO trying to do too much too soon. Therefore, at this juncture, TNO should seek to leverage and support existing networks across northern Ontario that have established relationships to industry and access to training dollars.
- The most likely organizations to support TNO in this role include: its sub-regional counter-parts, colleges, workforce planning boards, Ontario Employment providers, local chambers of commerce, FedNor, CFDCs, and municipal economic development departments.

3.1.6 Increase collaboration between industry and educators

Tourism operators report a reluctance to offer internships or hire interns. This supports the interview and focus group discussions, which highlighted a seeming disconnect between educators, community employment training programs, and operators. Accordingly, there is a need to investigate the opportunity for increased numbers of co-op opportunities, placements, and apprenticeships. On the other hand, there is a need engage the Ministry of Education and local school boards to stimulate interest in entrepreneurship and to impart career knowledge and the relevant skills required by the tourism sector.

3.1.7 Lessons learned about effective training delivery

Each of the streams of consultation elicited feedback around the most effective forms of employer centered training delivery. The following conclusions can be drawn from this body of research:

- One day or half day workshop based training is the preferred method of training for employers and employees.
- Training workshops with progressive content, with one workshop building on the next, is considered ideal. In this scenario, operators can go to a workshop and then go to the second phase of the workshop once they have had a chance to go apply their training. Website and social media training is well suited to this approach.
- Understanding adult learning principles in delivery and occupational standards based training and coaching models are fundamental to effective training delivery.
- Remote training is effective from a time and cost perspective, but user up-take and learning outcomes typically fall short of in-person training. There are also limitations with respect to internet access for some operators.
- Tourism-related aboriginal skills and training programs across Northern Ontario are well received and should be integrated within the strategy.

3.1.8 Training programming and development moving forward

Interviews with educators and training program coordinators suggest the relevant training materials and curricula have already been developed to support the training needs of the tourism sector. Moving forward, the emphasis should be on increasing training capacity at the local level to reach those hard to reach operators. In other words, there is a need to spend money on hiring facilitators and trainers at the local level.

The notable exception to this program content relates to the development of regional awareness training. In this vein, Tourism Niagara has developed an effective model with “become an ambassador Niagara," which may serve as an effective model for any such program. Another effective example is the “Algoma: That Real. Travel Counsellor Training Program.”

3.2 Conclusions

The preceding section, “Skills Development and Training in the Tourism Sector” concluded with a series of questions to guide the development of this strategy. Given the consultation summary presented above, and further support in the appendix, several overarching conclusions can be drawn from this research.

- Operators have a limited understanding of what training programs are available. In many cases, operators are also without a firm understanding of the potential value of training to them, their staff, and their business.
- Employees seem to place more weight on college or university based courses than shorter tourism training programs. At present, employees are receiving competing messages from educators and employers about the value of tourism based training.
- Navigating the complex relationships between Regional Tourism Organizations, associations, and councils with industry and training organizations is a daunting challenge. As TNO is a relatively new organization without broad-based brand recognition, many training organizations across Northern Ontario are still struggling to understand the role and mandate of TNO as it relates to training. To date, TNO has successfully orchestrated several training initiatives, but the visibility and broader sector's awareness of these initiatives have been limited without a comprehensive outreach program.
- TNO is relatively well positioned as a sanctioning body and facilitator for training delivery. TNO should seek to leverage and support existing networks in Northern Ontario that offer established relationships with industry and potential training funders. Such organizations include: colleges, workforce planning boards, Employment Ontario providers, local chambers of commerce, sub-regional tourism organizations, FedNor, and municipal economic development departments.

In this light, the development of a comprehensive and systematic outreach program to solidify sectoral linkages will be central to positioning TNO as a leading training facilitator / coordinator.

4 Summary of Tourism Labour Projections

This section summarizes the results of the tourism labour force projections developed for this study. These projections serve to inform occupational trends across Northern Ontario's tourism sector. The results have implications for occupational training requirements for each of Northern Ontario's geographic regions. The complete projection findings are provided in an accompanying Excel file.

These projections incorporate the recently released National Household Survey data for 2011 regarding employment by industry by occupation. The projections pertain to 2013 through 2023 for a selection of 108 tourism-related occupations. The complete list of these occupations, along with the methodology employed to develop these projections, is presented in Appendix D. The following section highlights the key findings from these projections.

The selected occupations are primarily, but not exclusively, found in the following industries:

- Accommodation services
- Air transportation
- All other transportation
- Food and beverage services
- Recreation and entertainment
- Travel services

Tourism Occupations Projection Results:

- The projections suggest that total employment between 2013 and 2023 will decline gradually across Northern Ontario. This reflects a pattern employment trends commensurate with the area over the previous 13 years.
- In 2013, the 108 selected occupations accounted for 119,226 of the total of 297,696 jobs in the study area (40% of all jobs across Northern Ontario). The model that converts the employment projections by industry above into employment projections by occupation projects that employment across all occupations will decline by 5,760 between 2013 and 2023.
- For the selected 108 tourism-related occupations, the model projects an employment decline of 2,579. Thus, the model projects the decline across the 108 selected occupations will account for a disproportionally low 31.8% of the overall projected decline in jobs in the study area.
- The oldest Baby Boomers turned 65 in 2011 and the youngest will turn 65 in 2031. As those Baby Boomers retire, they will need to be replaced by younger workers.

- Though economic change in the study area calls for the total number of jobs to decline by 5,760 between 2013 and 2023.The age-by-detailed-occupation data suggest that as many as 39,210 people could retire across all 500 occupations over that span. Across the selected 108 occupations, the total number of retirees could reach 17,270. Thus retirees from the selected 108 occupations could account for 45.2% of the potential retirees, a disproportionally high share.
- The 25 occupations with the highest economic loss and retirement need within the selected group of 108 tourism occupations account for an overall recruitment requirement of 13,980 between 2013 and 2023. This is 95.2% of the overall projected net need of 14,691 across the 108 occupations.
- The 10 occupations that will require the greatest recruitment attention are:
    - Retail salespersons
    - Administrative assistants
    - Janitors, caretakers, and building superintendents
    - Accounting technicians and bookkeepers
    - Light duty cleaners
    - Administrative officers
    - Receptionists
    - Bus drivers, subway operators, and other transit operators
    - Security guards and related security service occupations
    - Cashiers

  These top 10 occupations collectively account for two-thirds of the recruitment attention that will be required among the 108 selected occupations.
- Despite the projected decline between 2013 and 2023 in the total number of jobs, and in the total number of jobs across the selected 108 occupations, many of the current occupants of those jobs today will retire over the next decade. Accordingly, significant net recruitment will be required to replace the retirees in order to meet the overall labour market requirements of Northern Ontario’s tourism sector in the years ahead.

5 Needs and Gap Analysis

This section describes the most critical training needs of tourism operators along with the perceived gaps in available training. This section concludes with a discussion of several training delivery considerations. These considerations serve to directly inform the subsequent industry training strategy.

5.1 Identified Skill and Training Delivery Gaps

The overriding objective of this study and its collective consultation efforts was to identify the core-skill gaps and training requirements of the tourism industry. These skill areas and training requirements have already been identified and rationalized in the consultation summary above. These training areas have been consolidated into the figure below. Those training areas in red and followed by an asterisk have been identified as areas with training gaps. The nature of these training gaps is further described below.

Employment fundamentals

- **Employability Skills and Soft Skills including:** communication skills, personality and enthusiasm, and appearance/first impressions*
- **Literacy and numeracy training**

Basic Employee Tourism Training

- **"Service Excellence" with emphasis on customer service training**
- **“In good hands” Health, food and safety**
- **WHIMIS – workplace hazardous materials information system**
- **Smart Serve**

Advanced Employee Tourism Training

- **Customer Service Training***
- **Regional Awareness Training***
- **Cross-sector promotional training***

Management/Business Owner Training

- **Business planning / small business management**
- **Succession planning and mentoring training***
- **“Good boss” and Mentoring training***
- **Product Development / product quality assurance / renewing product offerings**
- **Website Development / Social Media Training**

Employability Skills and Soft Skills Training – While training programs have been developed to address these skills, including programming already delivered through Algoma District Services Administration Board (ADSAB) and building from *Supportive Approaches through Innovative Learning* (SAIL), the seemingly universal need for this programming across all tourism sub-sectors requires immediate attention. Across Northern Ontario, there is a lack of training in this area.

Customer Service Training – As noted by employers, employees, and industry insiders alike, customer service is the cornerstone of all tourism-related businesses. While training in this area is well developed with respect to content and program availability, it is lacking in at least two ways. First, despite the centrality of this training for the sector, employers and industry insiders consistently cited customer service training as a gap in the skill-set of many front line tourism workers. In addition, there is a widespread perception that the standardized forms of customer service training fail in their objective of imparting the true value of customer service.

Regional Awareness Training- While small scale local initiatives have been effective in this area, there is a lack of wide spread modular based training available to impart this training. OTEC has successfully developed such programming for regions in Southern Ontario, but has yet to develop the content to support this kind of sub-regional training across Northern Ontario.

Cross-Sector Promotional Training- This type of training can be delivered in principle, but developing sub-regional curricula to support this programming is the overarching challenge. The tremendous collaborative requirements of business and training providers have traditionally impeded this type of training development and delivery. Local chambers of commerce and larger employers are best positioned to operationalize this programming, but given the necessary industry champions and resource required, the successful delivery of this programming is challenging.

Succession Planning and Mentoring- Succession planning and mentoring centred workshops have been effectively developed to support other sectors. For example, the Ontario Ministry of Agriculture and Food has developed online succession planning guides to support the agricultural sector. To-date, there is a perceived lack of programming dedicated to supporting tourism operators with their succession planning and associated mentoring activities. Without succession planning support, existing tourism product offerings may be sold and repurposed at increasing rates.

"Good Boss" Training and Mentoring- Human resource management is a well-supported training area at the college level. At this point, shorter workshop-based training is considered a training gap in this area. Operators with limited time and resources require hands-on instruction. This type of programming is lacking across Northern Ontario, particularly as it relates to supporting smaller operators and staff.

5.2 Assessment of Resources and Initiatives

To inform this study, an inventory of courses and programs related to the tourism industry was compiled by the consulting team. This exercise identified approximately 300 courses/programs offered by educational institutions and training organizations across Northern Ontario.

An examination of the inventory in the context of this study's consultation results highlights an underlying gap between the programs/courses offered by educational institutions and the types of programs/courses demanded by employers and employees. In particular, the majority of courses and programs in universities and colleges are semester based while the majority operators and employees indicated a preference towards much shorter learning modules. In addition, the majority of programs offered by colleges and universities are taught in person with a relatively small number of courses offered remotely. Notably, Native Education and Training College is the only educational institution to offer most of their programs online. In this regard, training organizations such as OTEC are better suited to meet the varying demands of businesses and employees, with their programming being offered online, in 1/2 day or full day workshop format, through train-the-trainer models for in-house delivery. This training is also available through condensed 1 to 11 week certification programs that can be offered in more remote communities, as well as in partnership with community colleges.

Beyond this training delivery gap, an examination of the inventory also suggests the majority of programs and courses are not geared directly to supporting the tourism sector. Colleges and universities, for example, offer programs that may potentially support someone working in the tourism sector with business, accounting, or computer science programs, but again, these programs are seldom geared towards tourism specifically. The exception to this trend is in areas such as hospitality, culinary arts, and in tourism itself. Although, industry consultation suggested these programs are too theoretical with students emerging from them still unprepared to support the day to day operations of their business. The seeming strength in the inventory of tourism related training is within training organizations. In this regard, the majority of these courses are offered by *emerit* and OTEC.

The recent training initiatives supported by TNO with respect to customer service and social media training have also been well received by industry. With that said, the up-take of this programming is still relatively low. This may be attributed to an overall lack of awareness by industry of the availability and relevance of training.

5.3 Guiding Training Delivery Considerations

Before presenting the training strategy, it is important to underscore several considerations. Understanding and addressing these considerations will be fundamental to the effective implementation of the subsequent training strategy.

Industry awareness and understanding of training and associated benefits- There is a perceived lack of awareness and understanding of the types of training available to operators and their staff. Moreover, there is a perceived lack of awareness and understanding of the value of training and associated credentials across the industry.

An aging population will change the labour force composition- The largest growth segment of the labour force is the age group over 55 years of age while the size of the total population is static. As these skilled knowledgeable individuals begin to exit the labour pool, younger segments of the labour force will need to fill these positions. This will create opportunities for employment, business succession, and new business growth. Supporting this transition by offering business planning and succession based programming is of utmost importance to the continued vitality of the sector.

Communication and technological challenges – The existing communication channels and feedback mechanisms linking industry with educators and trainers are inadequate. While this speaks to the wide-spread disconnect between industry and training providers, it also underscores the persistent challenge of ensuring up-take of tourism-related programming and training on the part of employers and their staff. Simply put, Northern Ontario faces consistent engagement issues, especially with those owner/operators who are nearing retirement.

The sector's demographic realities also pose challenges to rolling out new programming, especially in programming that relates to the internet or new technologies. There is a lack of technology up-take across the sector. This poses challenges for product development and promotion and participation with remote training initiatives.

Complexity of the current training landscape- Across the tourism sector, there is frustration toward the complexity of navigating the various websites and portals associated with skills development and training. Operators seem overwhelmed or frustrated with the enormity of information. Facilitating awareness and easing navigation of available training options should be a priority area for this strategy.

Collaboration and coordination of efforts- Given TNO's mandate, it is potentially well positioned to identify and communicate training opportunities on an ongoing basis as well as facilitate the delivery of training where gaps are identified. TNO should seek to leverage and support existing networks across northern Ontario which have established relationships to industry and access to training dollars.

Effective training delivery- The most effective forms of employer-centered training delivery is characterized by: One day or half day workshop based training; training workshops with progressive content, with one workshop building on the next; and incorporation of adult learning principles in delivery. Understanding the target audience is critical to effective training delivery. Northern Ontario operators have a wide array of training needs and various delivery requirements. Geography, seasonality, and internet access are primary considerations to any training delivery.

Capacity building- Increasing the training capacity at the local level is central to the advancement of skills development across the sector. There is a need for more qualified trainers to provide affordable programming. Equally important is structuring training delivery options to accommodate part-time or short-term styles of training.

6 Tourism Workforce Training Strategy

6.1 Introduction

The goals and associated recommended actions that flow from the report findings are based on extensive research, consultation and the experience of the consulting team. The plan is grounded in six overarching goals and offers a series of tactical actions which can be found in the action plan and implementation strategy.

These goals and recommended actions are further informed by consultation with the project steering committee through the use of an on-line survey designed to determine the ranking ascribed to each goal and action item. The order in which these goals and actions are presented reflects the results of the survey, placing the most urgent goal as number one and others following accordingly.

The Strategy's goals are:

- Goal #1: Foster awareness and knowledge of available resources, programs, and training opportunities
- Goal #2: Foster partnerships between educational organizations, community employment training programs, and industry
- Goal #3: Increase training capacity to meet the needs of operators
- Goal #4: Advance skills development and training to meet the needs of tourism operators and their staff
- Goal #5: Support operators to address human resource needs and future planning
- Goal #6: Promote employer investment in on-the-job training and skills development in employees

As noted above, as TNO moves forward to address these Goals, it is important to reiterate and emphasize the sheer number of organizations across Northern Ontario, which are already well positioned to support TNO in operationalizing this strategy. The table below highlights a number of organizations which may be positioned to either fund, facilitate, champion or support these Goals and supporting Actions. In this regard, the complexities and political nuances associated with the funding and training landscape in Northern Ontario pose a clear challenge to isolating likely partners. Therefore, instead of identifying partners to support each of the Action items, it is recommended that TNO initiate discussions with these potential partners to identify who is in a position to champion or support these actions based on their capacity and mandate. Pursuing this collaborative approach will be the most effective means of implementing the strategy.

Organization	Description/Mandate	Examples of Related Projects or Initiatives
Canadian Tourism Human Resource Council	The Canadian Tourism Human Resource Council (CTHRC) is an organization whose goal is to improve the quality of the Canadian labour force and to assist businesses to be more flexible in meeting changing competitive demands. This organization deals directly in the human resources (HR) dimension of the tourism sector and has resources and tool-kits geared toward helping employers best maximize the quality and competence of their HR offices or personnel. In Ontario, CTHRC programs (*emerit*, Discover Tourism, etc.) are administered by OTEC.	CTHRC refers clients to OTEC training and certification programs, as well as works with all levels of learning institutions to develop industry responsive programming.
Community Futures Development Corporations (CFDCs)	Community Futures Development Corporations support community economic development by assisting Ontario's rural and northern communities to strengthen and diversify their economies. They are funded annually by FedNor.	The corporations provide needed grants to tourism operators and numerous events, including workshops are advertised on their websites, indicating when events will occur, where they are taking place, and who is administering the event.
Contact North	Is an online learning portal for faculty and instructors, providing information on the latest trends, best practices, emerging technologies, and training opportunities for online learning in Ontario, particularly in remote areas.	Contact North hosts a large number of web conferences geared toward instructors and professors at various levels of e-class education, with many conferences offered in both French and English.
Destination Marketing Organizations	These organizations represent greater-municipal area tourist destinations, activities and entertainment, marketing their virtues, and providing online and printed information about local accommodations, restaurants, activities, attractions, and more.	Acts as an intermediary between tourism operators and potential resources that may address their employment or training needs. In some instances, DMO’s deliver training or have supported the “train the trainer’ component to deliver further training to operators.

Direction Ontario	An organization committed to ensuring that customer service related employees in the tourism sector are adequately able to communicate with Franco phones.	Provides workshops, webinars, and information packages designed to appeal to and put at ease the Francophone traveller visiting Ontario for business or pleasure.
Discover Tourism	This online resource helps those interested in careers in the tourism sector identify learning opportunities and resources, as well as institutions that offer programs they are interested in. It also provides information about different occupations, including salary and education requirements.	This organization has an extensive resource library for learning and skills development for any level or discipline within the greater tourism industry.
Emerit	Learning resources designed to meet industry needs in tourism related occupations based on National Occupation Standards' benchmarks. The *emerit* programming is designed to be integrated into education curriculum or in staff training.	*Emerit* offers a wide range of tourism related programs from Aboriginal tour guides to restaurant management to food and beverage service.
FedNor	FedNor is the Government of Canada's economic development organization for Northern Ontario. Through its programs and services, and through its financial support of projects that lead to job creation and economic growth, FedNor works with businesses and community partners to build a stronger Northern Ontario.	Funding from this program has gone to a number of tourism-related developments, entrepreneurships, and education opportunities.
Great Spirit Circle Trail	Assembled by the Anishinaabe People on Manitoulin Island, the Great Spirit Circle Trail offers nature-based and cultural tourism experiences for varying levels of expertise and education.	The Trail offers a variety of artistic, natural, and educational experiences, including specialty workshops related to traditional activities of the Anishinaabe People.

Local Chamber of Commerce	Local chambers of commerce represent the business interests of a given community in ways that seek to unlock the greatest potential for businesses to thrive, including those in the tourism sector. As such, they champion programs and policies that lead to more successful entrepreneurs or business leaders and support the growth of local talent.	The North Bay and District's Chamber of Commerce recognizes students who do exceptionally well in schooling, such as a young lady that excelled at Canadore College's Hotel, Resort and Restaurant Management program and obtained a prestigious internship at a world-class resort in Lake Louise, AB.
Ministry of Education	The Ministry of Education oversees all publicly funded education in elementary and secondary school education in Ontario. Aside from providing literacy and numeracy skills that help any child move forward into adult-life's challenges and demands, the Ministry also oversees cooperative education programs, some of which are directly associated with the tourism sector.	Co-op students are given an opportunity to test the waters of a career they may be interested in, such as culinary arts or event organizing. They also provide an opportunity to develop essential skills and habits demanded in the workplace.
Municipal Economic Development Departments	Municipal economic development departments strive to uphold and enhance the economic vitality of municipalities through programs and services. Many economic development departments or corporations place strong emphasis on tourism related businesses, which hire locally and serve visitors.	Thunder Bay's Community Economic Development Commission provides updates about upcoming Tourism Thunder Bay industry events and workshops to help generate awareness.
Nature and Outdoor Tourism Ontario	Initially limited to Northern-Ontario, this organization expanded to represent interests of all resource-based tourism industries across the whole province by 2000. The organization advocates policies that enhance the quality, diversity, and economic vitality of the nature and outdoor tourism industry in Ontario.	The website has a plethora of learning resources on a range of industry related themes, from hiring the right employees, to financial management.

Northern Literacy Networks	Comprised of three smaller regional networks, Northern Literacy Networks strives to improve the quality of life of Northern Ontarians via lifelong learning opportunities administered by numerous agencies and not-for-profits. They facilitate and coordinate community planning centred around developing literacy service plans, building partnerships, collaborating with community partners, and much more.	One current program is designed to provide career-building steps through employment opportunities paired with literacy education, targeting under-represented groups or people with low education levels.
Northern Ontario Heritage Fund Corporation (NOHFC)	An organization dedicated to bringing programs designed to foster hope, opportunity, and growth in Northern Ontario.	Oversees an internship program which helps students obtain practical skills in their designated trades, including those related to the tourism occupations.
Ontario Employment Service Providers	Funded by the MTCU, Employment Ontario and its service providers offer a range of employment supports to job seekers. These service providers also maintain industry contacts to facilitate job placements. Employment service providers support training and may also provide financial incentives to employers to hire new employees.	Employment Ontario directly supports apprenticeships and administers the youth Employment Fund, which is helping 30,000 young people across Ontario get work experience, start a business, or build job skills. Adult learning opportunities are also provided free of charge.
Ontario Ministry of Tourism, Culture and Sport	The tourism portion of this Ministry works closely with the sector to promote economic development and investment opportunities that will sustain the travel and leisure sector of Ontario's economy and rich cultural landscapes.	The Ministry has learning tools geared toward starting or expanding businesses associated with tourism and for different kinds of operators.

Ontario Ministry of Training, Colleges and Universities (MTCU)	Is the “one-stop-source” for information and services for students of all stripes and academic levels, job-seekers, and employers. It also develops and funds policies related to employment and training, apprenticeship programming, career development and employment preparation, and adult literacy and basic skills development.	MTCU has a listing of vocational and college programs related to tourism sectors, detailing program details, number of annual graduates, and employment rates within the field. For example, food and nutrition management programming is available at Canadore College (various locations) and Centennial College (various campuses) in a three year program, where 40 graduate at a time, 33 of which were surveyed, and of which 27 had found employment in their fields.
Ontario Tourism Education Corporation (OTEC)	OTEC is an independent, not-for-profit training and human resource development organization dedicated to increasing professionalism in tourism and hospitality and service related businesses and sectors within Ontario. OTEC supports the training, certification, and skills development for the tourism and hospitality industry.	Delivers industry training in Northern Ontario such as “Overcoming Difficult Service Situations” and “Preparing your Business for International Visitors, as well as secondary, post-secondary, and community employment training programs through a network of 32 training organizations in RTO13 representing a combined 49 trainers certified to deliver OTEC program in their communities. The network includes 13 School Boards and 3 community colleges.
Ontario Tourism Marketing Partnership Corporation	The OTMPC collaborates with tourism partners and colleagues at home and internationally to develop and deliver integrated, research-driven marketing programs that reinforce Ontario as a strong tourism economy and four-season travel destination.	The OTMPC’s industry Partnership Proposal Program encourages co-operative industry marketing activities that increase tourism revenues. The OTMPC offers a tool kit for their industry partners to use in support of their marketing efforts.

Regional Workforce Planning Boards	Engages communities to identify and respond to labour market trends, demands, challenges, capacities and competitiveness, and bridge relationships between local and global economies.	The North Superior Workforce Planning Board is a heavy proponent of apprenticeship training and sponsor identification. It has a well developed web portal with training related links and resources.
Small Business Enterprise Centers	With small enterprises (5 employees or fewer) comprising a significant portion of the employment landscape of Ontario, especially in the North, SMECs provide resources to make sure that SMEs flourish and that their voices are heard regionally and provincially.	The Timmins Small Business Enterprise Center has a news feed updated regularly, featuring many workshops and learning opportunities that would benefit any small business owner.
Tourism Industry Association of Ontario	This umbrella organization is comprised of numerous associations, destination marketing organizations, and regional tourism organizations active in Ontario's tourism sectors, performing advocacy on behalf of the industry, communication with stakeholders, value for members, and representing the full diversity of the industry.	TIAO is undertaking a project to promote tourism as a career. As part of the Ontario Tourism Workforce Development Strategy, the project is aimed at helping Ontario tourism maintain its competitive edge, and it intends to highlight longevity within travel & tourism employment.

Finally, effective implementation of the recommended actions must be accompanied by effective performance measurement that serves as a tool to determine how well a job has been done using both qualitative and quantitative information and activities. Performance measurements track quality and performance by:

- Providing public accountability
- Assisting with human resources management
- Using results to improve performance
- Identifying the return on investment

A more formal and comprehensive performance measurement model may be utilized to keep the tourism community engaged and informed of outcomes as these actions are implemented.

6.2 Vision and Mandate

In partnership with industry, Tourism Northern Ontario seeks to increase tourism, build tourism capacity, and advocate on behalf of Northern Ontario Tourism. TNO's mission is to empower Northern Ontario's thriving tourism industry. As part of this vision and mandate, TNO will work to address industry skill and training gaps. It is this mandate that underlies each of the action items presented in the action plan and implementation strategy below.

6.3 Action Plan and Implementation Strategy

Goal #1: Foster awareness and knowledge of available resources, programs, and training opportunities

Priority Ranking	Recommended Actions	Timing
1.1	Create a regional communication strategy to share information and resources and build awareness of available training opportunities and resources. The target audience of this communication campaign includes: • Operators • Local chambers of commerce • Municipalities • Industry resource organizations (e.g. Sub-Regional Tourism Organizations, FedNor, SBEC, Workforce Development Boards, funding agencies, etc.)	Short term
1.2	Coordinate the publication of an annual tourism related training calendar to be distributed across the sector. With an emphasis on events lasting fewer than five days, the calendar would allow for potential users to plan ahead and systematically attend relevant training programs. Alternately, operators may plan to have their staff attend particular training opportunities. Ideally, the information in this calendar would include the trainer or training provider, the intended audience, the purpose of the training, and any pertinent logistical details.	Medium to Long Term

1.3	Increase the partnership development capacity of the TNO.	Short Term
1.4	Improve online fulfillment and booking capability - Expand the use of the Meridian system throughout the region by supporting the training of industry partners and operators.	Short Term
1.5	Support and expand existing programs to capitalize on the aboriginal community to support the tourism sector.	Medium to Long Term
1.6	Develop a comprehensive online tourism related training web page. This web page should contain a series of links to relevant training programming. It is important that this web page does not provide specific course links which may overwhelm a potential visitor. Instead, the portal should describe types of training available from different training institutions and how they might relate to the user. This will reduce the need for regular site-maintenance while driving traffic to the relevant training providers. This web page may also support user registration to facilitate continued industry communications.	Short term
1.7	Integrate the “Employer of Choice” program with the online portal and support industry organizations in communicating the program regionally.	Medium Term

Goal #2: Foster partnerships between educational organizations, community employment training programs, and industry

Priority Ranking	Recommended Actions	Timing
2.1	Encourage more structured information-sharing between training institutions, community employment training programs, and the business community to strengthen program alignment and skills demand. Promote opportunities for corporate support for capital investment or access to technology, equipment, to strengthen program curriculum.	Medium term
2.2	Leverage partnerships to encourage the tourism operators to create additional opportunities for co-op placements. These placements should support community training, secondary, and post-secondary programs.	Short term and ongoing

2.3	Examine the establishment of regionally based "industry committees" that could serve as a sponsor for individuals seeking apprenticeship; these committees would "share" the employee across their businesses, allowing for the full slate of experiential learning to be achieved.	Short term to medium term

Goal #3: Increase training capacity to meet the needs of operators

Priority Ranking	Recommended Actions	Timing
3.1	Emphasize core customer service skills in all tourism training programs.	Short term
3.2	Continue to advocate for tourism workforce development funding and policy support.	Ongoing
3.3	Support industry organizations in promoting regional businesses and stakeholders' access to and utilization of online resources, including the training calendar.	Medium to Long term
3.4	Collaborate with industry organizations to identify delivery channels and funding to develop regional small-business and entrepreneurship training and support models.	Medium term
3.5	Support more investment in management skills training. This includes certificate programs that can be completed through a series of one-day workshops.	Short term

Goal #4: Advance Skills Development and Training to meet the needs of Tourism Operators and their Staff

Priority Ranking	Recommended Actions	Timing
4.1	Support, facilitative, or coordinate specific training initiatives in the following areas: • Employability Skills and Soft Skills including: communication skills, personality and enthusiasm and appearance/first impressions* • Literacy and numeracy training • "Service Excellence" • "In good hands" Health, food and safety	Short to Long term, depending program development timing.

	• WHIMIS – workplace hazardous materials information system • Smart Serve • Customer Service Training* • Regional Awareness Training* • Cross-sector promotional training* • Business planning / small business management • Succession planning and mentoring training* • “Good boss” and Mentoring training* • Product Development / product quality assurance / renewing product offerings • Website Development / Social Media Training Note. Those training areas followed by an asterisk are deserving of immediate attention as these areas have been identified as areas with training gaps. The nature of these training gaps is described in the preceding chapters.	
4.2	Where programming gaps are identified (see action above) advocate and/or facilitate the development and funding of local training programs.	Ongoing
4.3	Support a career laddering approach to skill development for tourism operators and employees. Laddering would embrace the following sequence of training: • Employment fundamentals • “Service Professional” common front-line soft skills • Occupation-specific front-line skills • Management/Business Owner Training	Long term
4.4	Establish skill development metrics by developing and communicating metrics to track industry workforce skills development. Potential metrics include: • National Occupational Standards Downloads - OTEC can provide to help track uptake of resources • Training Participation Rates • Certification Rates • Community Employment Results • Labour Shortage Projections by Occupation • Workplace Skills Assessments	Long term

Goal #5: Support operators to address human resource needs and future planning

Priority Ranking	Recommended Actions	Timing
5.1	Support the development and proactively market and distribute materials and programming to support succession and business planning. The Ontario Ministry of Agriculture and Food has programming to support farm operators, but similar programming is yet to be developed for tourism operators.	Short to Long term (contingent on timing of training development)
5.2	Support the development of initiatives that address the lack of essential employability skills in the local workforce. The Simcoe Muskoka Workforce Planning Board (SMWPB) is currently developing the framework for such a program in collaboration with Ontario's workforce planning boards and industry partners. Training programs in this area have also been developed to address these skills through programming already delivered through Algoma District Services Administration Board (ADSAB) and building from *Supportive Approaches through Innovative Learning* (SAIL).	Medium term to long term
5.3	Ensure awareness among local businesses of the importance of organizational memory. Provide workshops that seek to minimize the impact of retirees. Potential tactics include: Conducting exit interviews to ease the entrance of new employees; developing oral histories of the "here-and-now" of business; and developing corporate histories that will transmit the identity and culture of the business between generations. This will support the value proposition associated with effective succession planning.	Medium term to long term

Goal #6: Promote employer investment in on-the-job training and skills development in employees

Priority Ranking	Recommended Actions	Timing
6.1	Create a marketing campaign that highlights employer benefits of investment in employee training. This could leverage a Tourism Northern Ontario Award/Designation that recognizes employers who demonstrate investment in skills and knowledge development among staff.	Short term
6.2	Utilize the Excellence in Manufacturing model which pools local industry demand for specific programs and workshops to facilitate access and reduce cost.	Medium term to long term
6.3	Secure funding for the “Employer of Choice” feedback and measurement model to guide HR development practices for small to medium sized businesses. Examine existing models to emulate. For example, Tourism Saskatchewan has an employer of choice program. Refer to the following website for details: http://www.stec.com/employer-of-choice-program/2013-employers-of-choice	Medium term to long term
6.4	Promote Apprenticeship and educate employers on the free services available to them. Examine the “Destination: Apprenticeship!” initiative developed by the Niagara Workforce Planning Board as a potential model. This short publication thoroughly describes the value proposition of supporting apprenticeships. Refer to the following website for details: http://www.niagaraworkforce.ca/wp-content/uploads/2013/11/DestinationApprenticeship.pdf	Short term to Medium term
6.5	Encourage local businesses to participate in college and university internship and support programs as a means of attracting and retaining educated talent to the tourism.	Short term and ongoing
6.6	Develop a business case that validates the return on investment for local businesses to participate in work-college apprenticeship programs offered by colleges.	Short term

Appendix A: Demographic Assessment

6.4 Demographic and Socio-Economic Context for Northern Ontario

6.4.1 Population and Population Growth

In 2011, Northern Ontario had a population of 700, 280 inhabitants, a decrease of 1.7% from 2006, when the population was 712,037. This stands in contrast to the provincial increase in population by 4%, from 12,160,282 inhabitants in 2006 to 12,651,795 in 2011. Figure 2 shows the distributions across each district of Northern Ontario, with regional and provincial totals for comparison. The area with the most drastic reduction in population was Kenora (-10.6%), while Manitoulin and Nipissing both saw minor increases in population size (3.3% and 0.1%, respectively). Overall, the population is shrinking in Northern Ontario, while Southern Ontario continues grow.

FIGURE 2 POPULATION CHANGE BETWEEN 2006 AND 2011

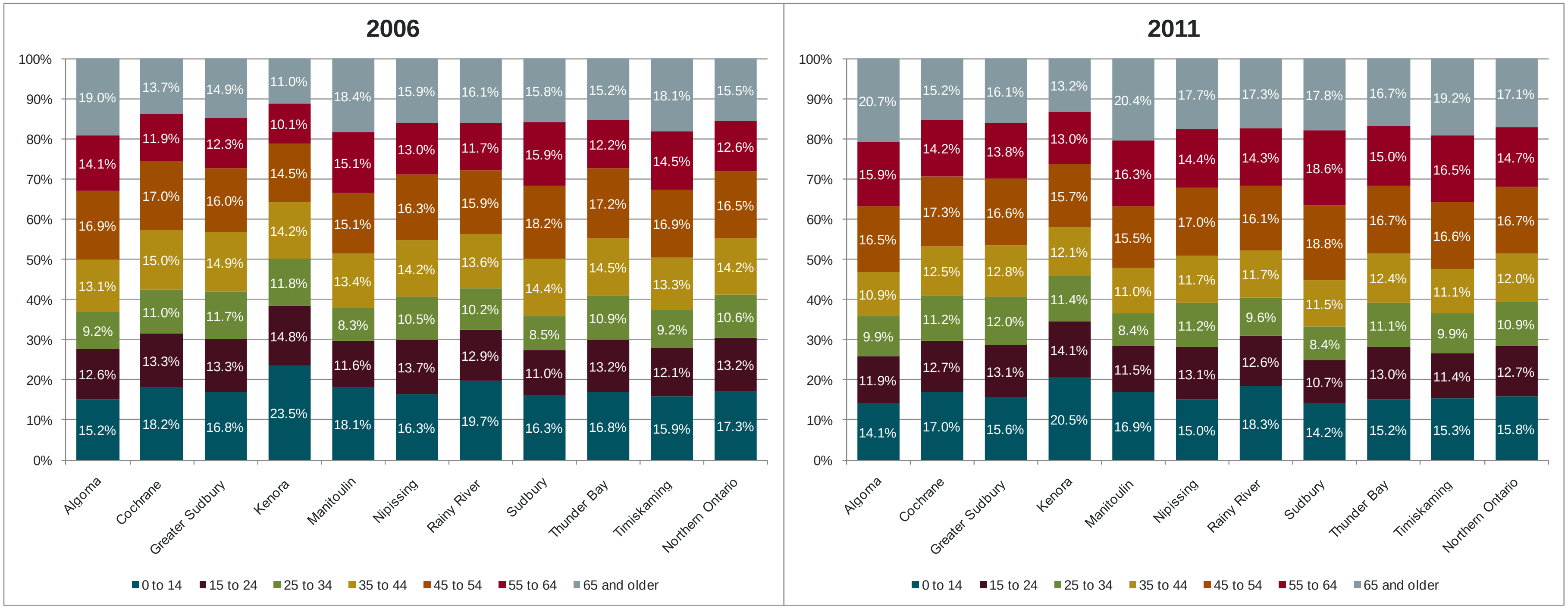
	2006	**2011**	**% Change**
Algoma	117,461	115,870	-1.4%
Cochrane	82,503	81,122	-1.7%
Greater Sudbury	157,857	160,274	1.5%
Kenora	64,419	57,607	-10.6%
Manitoulin	12,631	13,048	3.3%
Nipissing	84,688	84,736	0.1%
Rainy River	21,564	20,370	-5.5%
Sudbury	21,851	21,196	-3.0%
Thunder Bay	149,063	146,057	-2.0%
Timiskaming	33,283	32,634	-1.9%
Northern Ontario Total	712,037	700,280	-1.7%
Provincial Total	12,160,282	12,651,795	4.0%

Source: Statistics Canada, National Household Survey, 2011; Statistics Canada, Census, 2006

6.4.2 Population by Age Structure

Residents of Northern Ontario are also becoming older, with shrinking population cohorts at a regional level nearly across the board until the age of 55 and older. These statistics are demonstrated in Figure 3, which provides two side-by-side graphs for 2006 and 2011. The only cohort below 55 that saw growth between 2006 and 2011 was the 25 to 34 year old cohort, with an increase of 0.3%. Sudbury saw the most drastic decline of any cohort (19.8%) for those people aged 35 to 44, followed by Nipissing and Manitoulin each with decreases of 17.4%. Meanwhile, the largest increase to any age cohort was experienced by Kenora, with 19.5% growth of its population over the age of 65, followed by Sudbury and Manitoulin at 12.9% and 11.3%, respectively. Overall, the figures tell us that while there are an increasing amount of people that fall into the age cohorts above the age of 55, there are less and less people below that age, suggesting that younger cohorts are leaving Northern Ontario.

FIGURE 3 REGIONAL DISTRIBUTIONS OF AGE GROUP PROPORTIONS

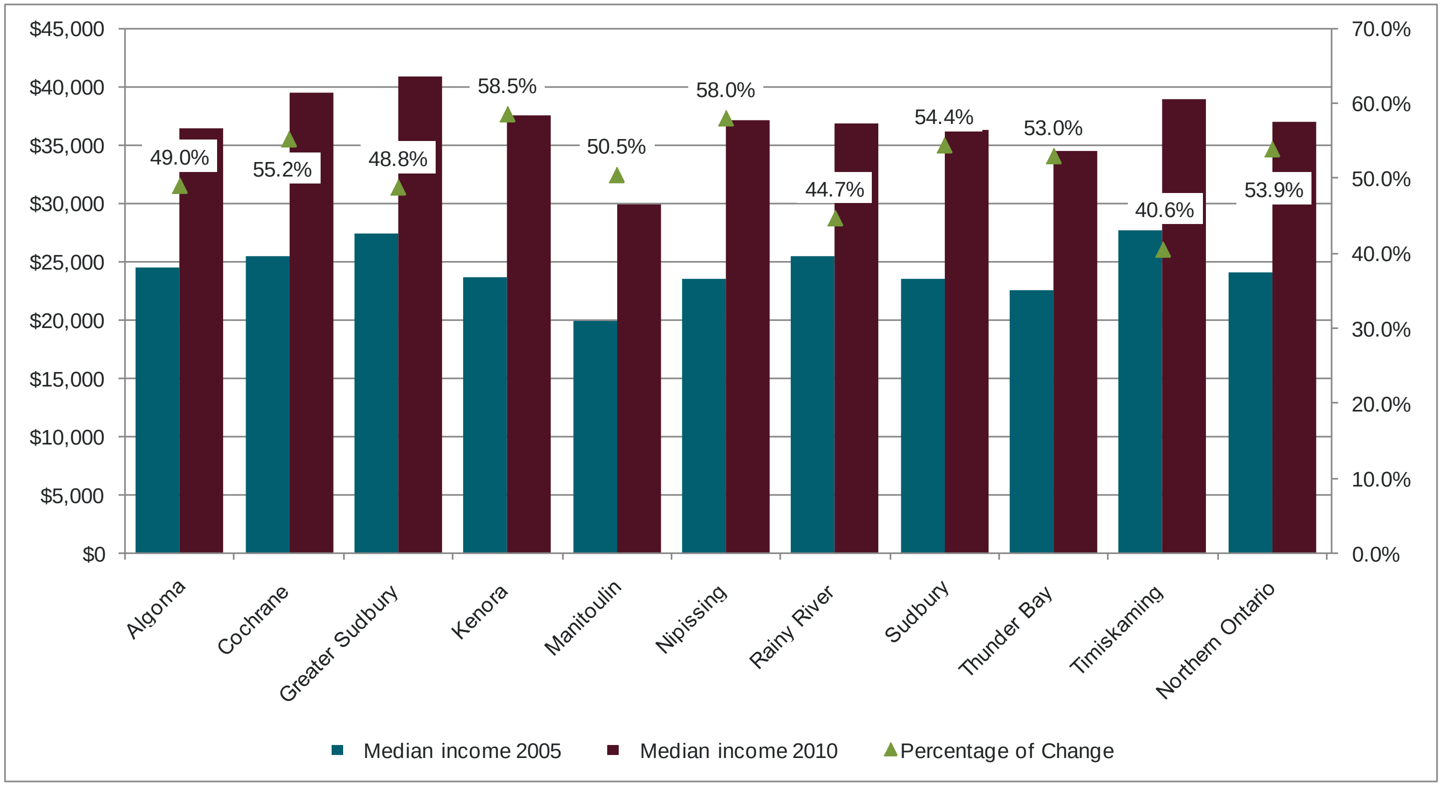


Source: Statistics Canada, Census, 2006; Statistics Canada, National Household Survey, 2011

6.4.3 Median Personal Income

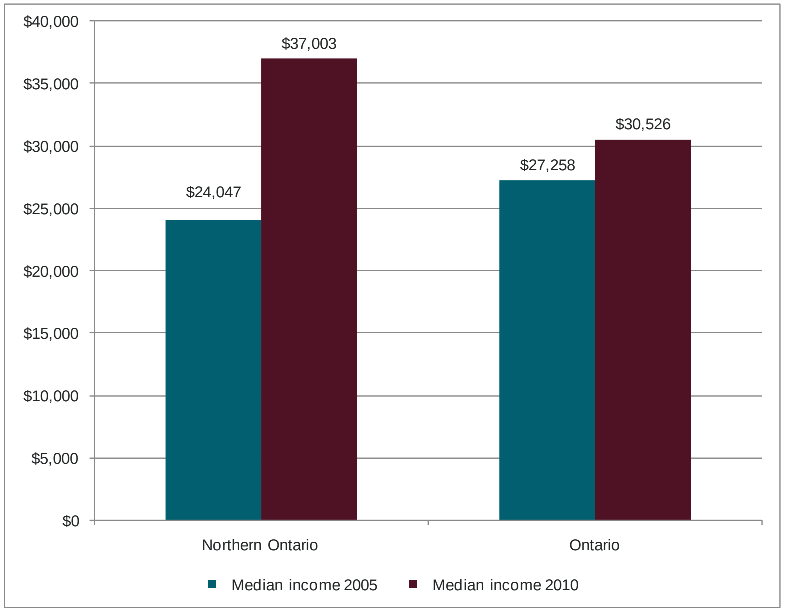
Between 2005 and 2010, changes to personal income appear drastic, with an average increase in annual income of 53.9% for Northern Ontario. Figure 4 shows the district changes in median income for each district and the regional average. Each district has shown an increase in annual income, with the smallest increase being 40.6% for Timiskaming and the highest increase being Kenora at 58.5%. Figure 5 demonstrates that both Northern Ontario as well as the entire province saw increases in income, with Northern Ontario's median income increasing by $12,956 between 2005 and 2010, and the provincial median increasing by $3,268.

FIGURE 4 CHANGES IN MEDIAN INCOME FOR 2005 AND 2010 TAX YEARS



Source: Statistics Canada, National Household Survey, 2011.

FIGURE 5 MEDIAN INCOME FOR 2005 AND 2010, NORTHERN ONTARIO AND PROVINCE



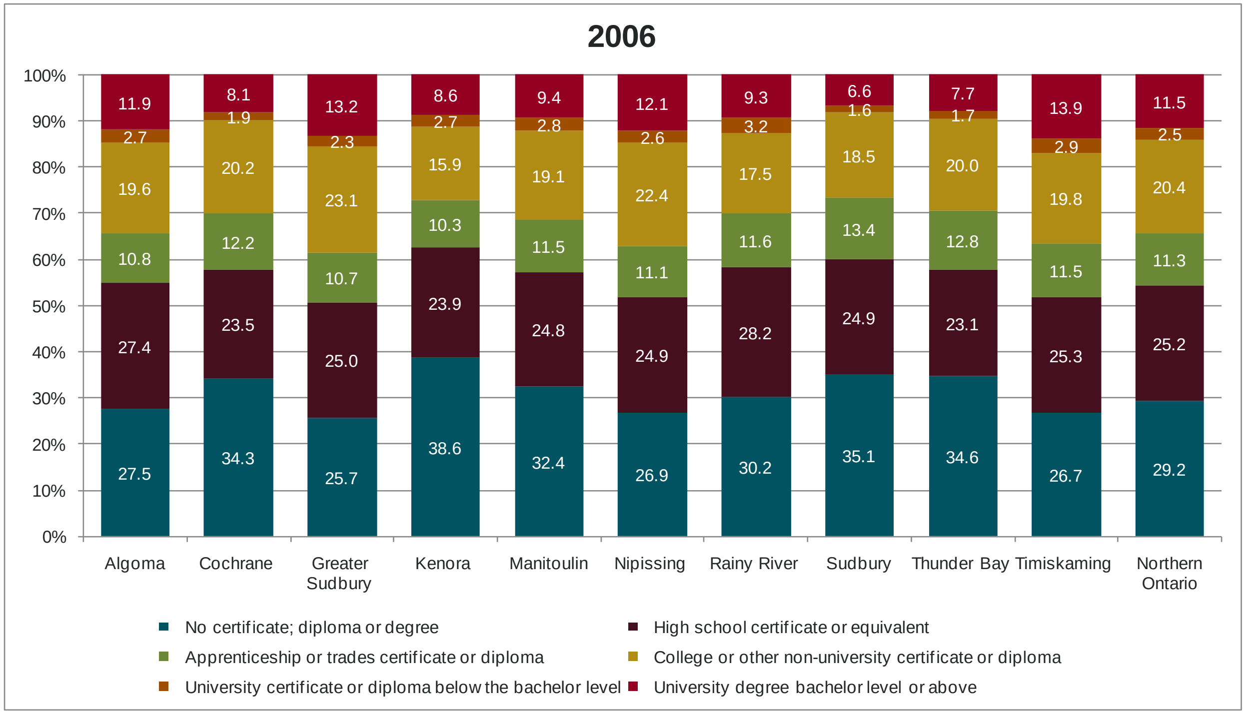
Source: Statistics Canada, National Household Survey, 2011; Statistics Canada, Census, 2006.

While these numbers may appear rather positive, a word of caution must be offered regarding a major change in the way in which census data was collected starting in 2011. In effect, the median income data for the National Household Survey was collected voluntarily, and this may have introduced a bias to the result. While there may well be increases in individual income between the tax years of 2005 and 2010, the extent to which these measures can be reliably used for inferential purposes is uncertain.

6.4.4 Education

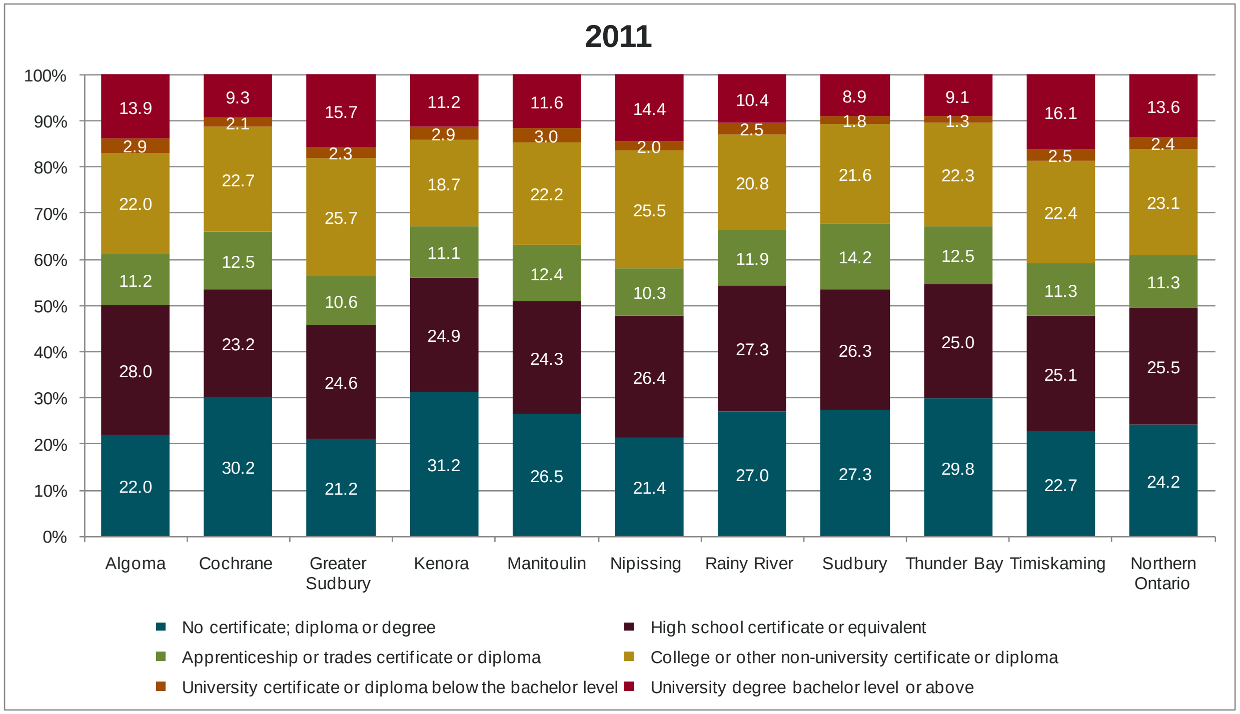
Figure 6 and Figure 7 show the distribution of education levels across Northern Ontario for 2006 and 2011, respectively. When viewed comparatively these figures provide several useful insights. The district with the largest reduction in the number of people having not completed high school is Sudbury, with a decrease of 7.8%, with Kenora following with a decrease of 7.4%. Overall in Northern Ontario, more people are completing high school than previously, with an average difference of 5.1% across the entire region. For those reporting having obtained a high school degree or equivalent there was only marginal change from 2006 to 2011, with Nipissing having the highest increase in percentage of people with a high school degree or equivalent of 1.5%, followed by Sudbury with 1.4%. The regional average for all of Northern Ontario saw an increase in the number of people within this category of only 0.3%, with Rainy River, showing a decline of the number of people with a high school degree or equivalent of 0.9%. Similarly, there are no significant changes to the proportion of people obtaining apprenticeship or trade certificates.

FIGURE 6 NORTHERN ONTARIO AND SELECTED GEOGRAPHIES LEVELS OF EDUCATIONAL ATTAINMENT, 2006



Source: Statistics Canada, Census, 2006.

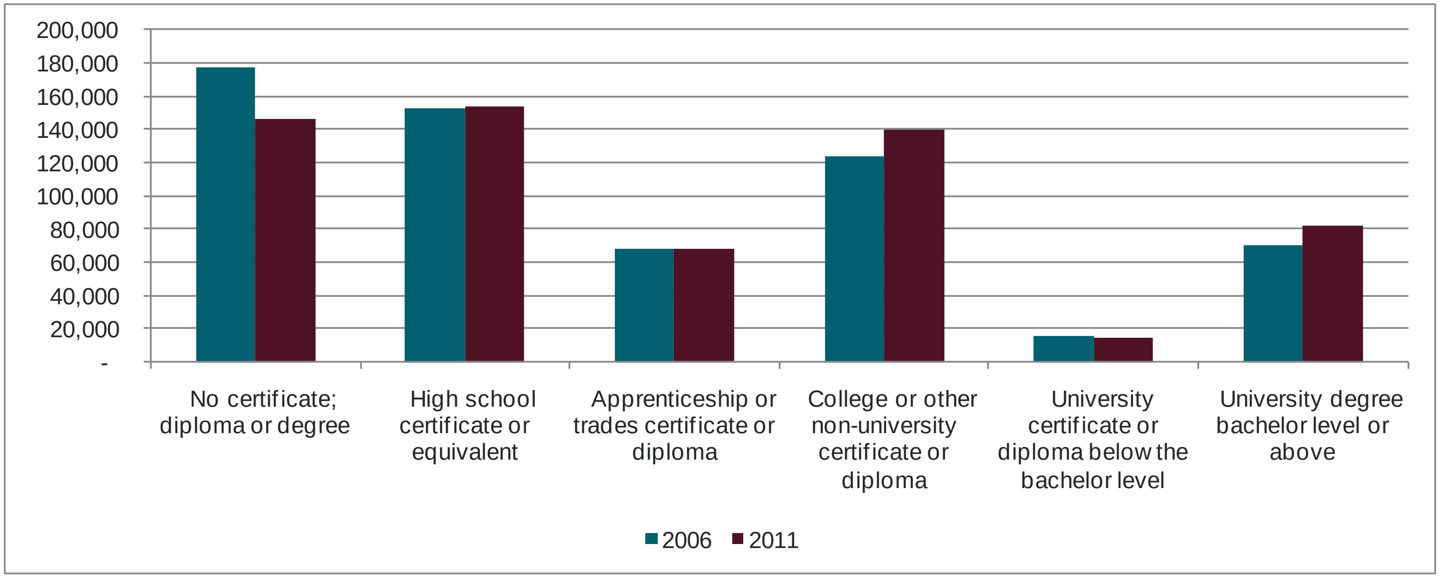
FIGURE 7 NORTHERN ONTARIO AND SELECTED GEOGRAPHIES LEVELS OF EDUCATIONAL ATTAINMENT, 2011



Source: Statistics Canada, National Household Survey, 2011

The largest changes are evident in classifications of college or other non-university certificates or diplomas and in those who obtained a bachelor's degree or higher. These increases are most easily observed at the aggregate regional level for all of Northern Ontario, as is demonstrated in Figure 8. For those spin-off careers associated with the tourism sector, there are many college certificates that relate to the industry, whereas those that chose to go to university and obtain a bachelor's degree or higher will likely occupy many management positions in this sector. With the discussion of changing demographics and a shrinking workforce population, the fact that those residents of Northern Ontario are on average increasing their levels of education may be promising for the tourism sector. At the same time, consideration needs to be given to the point raised above about a possible sampling bias inherent to the 2011 National Household Survey. The survey has sampling bias towards those people with higher levels of education as they are more likely to fill in the voluntary National Household Survey component of the census in 2011, and those with less education were less likely to do so.

FIGURE 8 COMPARATIVE LEVELS OF EDUCATION FROM 2006 TO 2011 IN NORTHERN ONTARIO BY POPULATION TOTALS

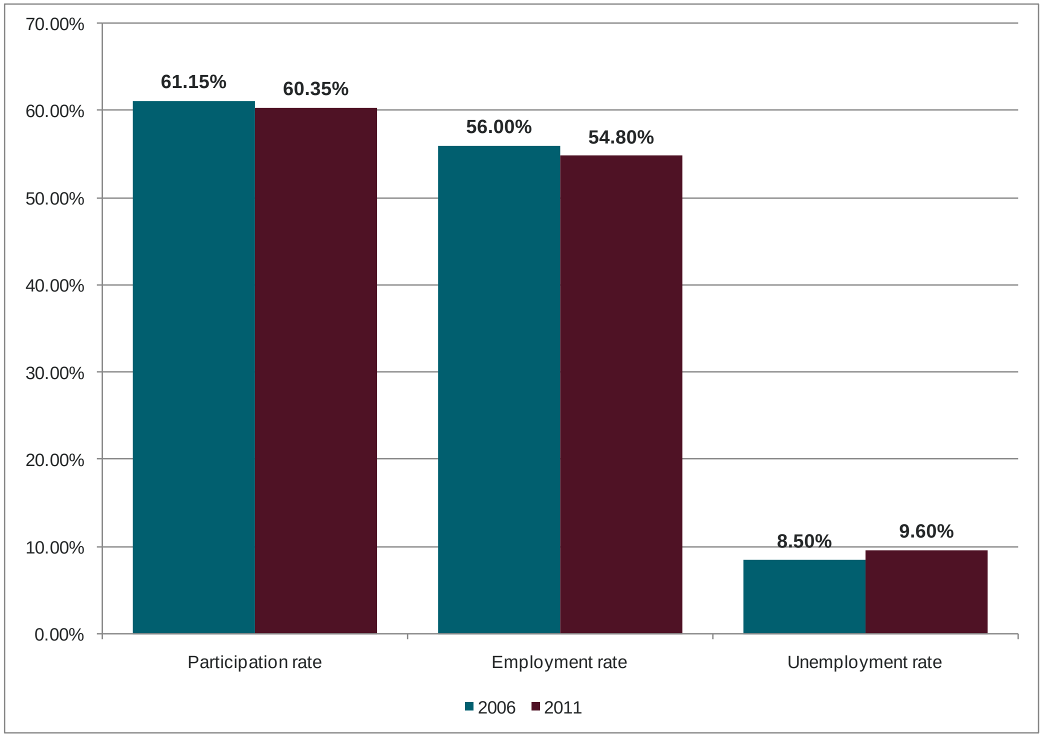


Source: Statistics Canada, 2011, National Household Survey; Statistics Canada, 2006, Census

6.4.5 Labour Force Trends

With unemployment rates in the all of Northern Ontario at 8.5% in 2006 and 9.6% in 2011, there is a growing proportion of the population that is out of work. Figure 9 shows that the employment rate fell by 1.2% over the period between 2006 and 2011, as did the participation rate. The employment numbers may be related to why working-aged people are on the decline across the region, as discussed above.

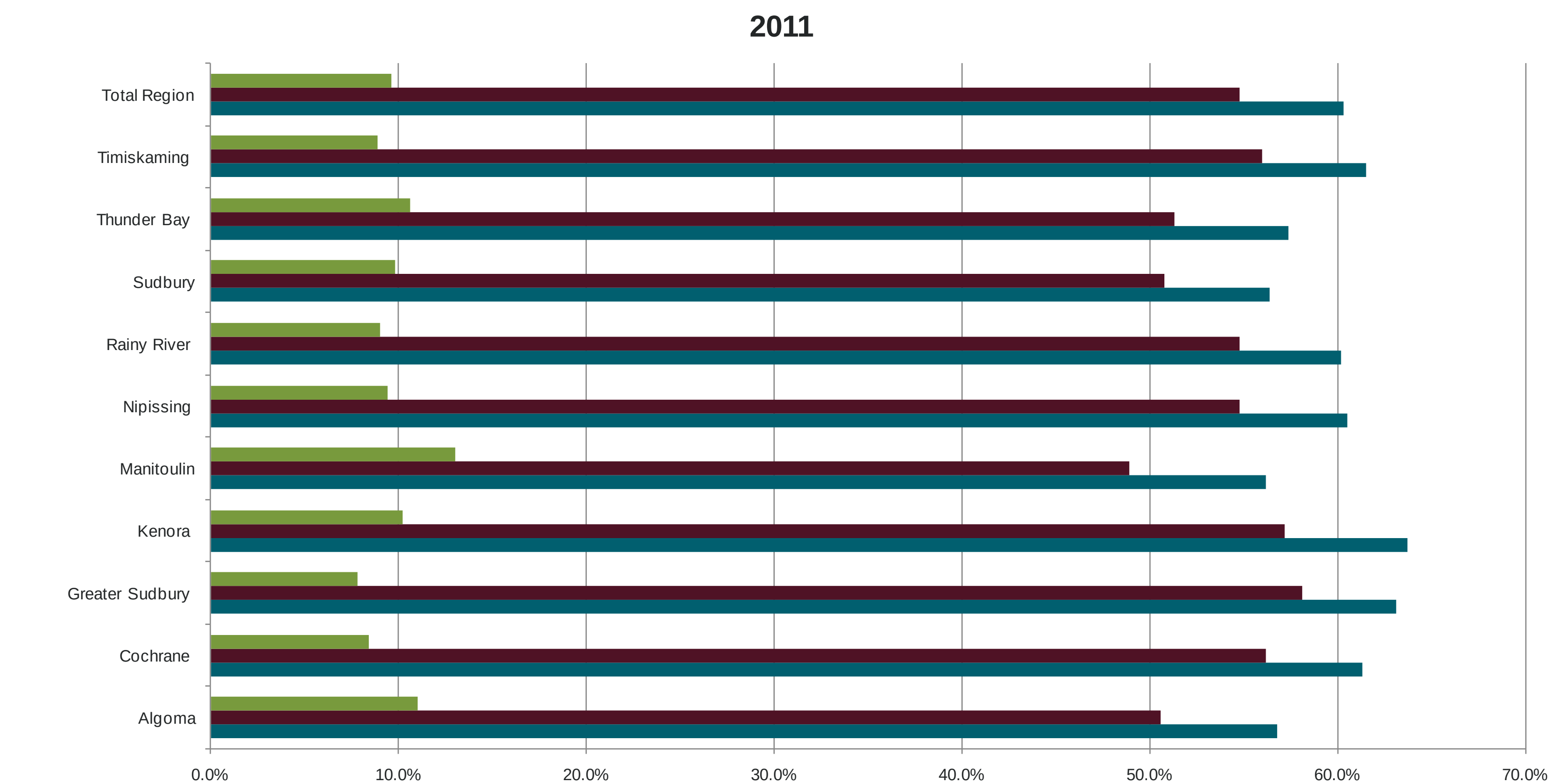
FIGURE 9 NORTHERN ONTARIO LABOUR FORCE INDICATORS 2006, 2011



Source: Statistics Canada, National Household Survey, 2011; Statistics Canada, Census, 2006.

Figure 10 illustrates the employment landscape across Northern Ontario's 10 districts. Greater-Sudbury district and Kenora had the highest proportion of people either employed or willing to be employed in 2011, while Manitoulin and Algoma had the lowest participation rates, at 56.2% and 56.8%, respectively. These participation rates for Manitoulin and Algoma are inversely related to unemployment rates of 13 and 11%, respectively. Those districts with high unemployment figures therefore hold an inverse relationship with participation rates. When compared between 2006 and 2011, Figure 11 demonstrates the shifts in unemployment across the ten districts. Sudbury was the only district to post a decrease in its unemployment rate over the period from 11.6% in 2006 to 9.8% in 2011. Greater-Sudbury maintained the same rate over both periods at 7.8%, while the largest increase in unemployment was felt in Manitoulin at 2.6 % (10.4% to 13%), followed by Thunder Bay, at 2.4% (8.2% to 10.6%).

FIGURE 10 LABOUR FORCE INDICATORS ACROSS NORTHERN ONTARIO'S 10 DISTRICTS, 2011

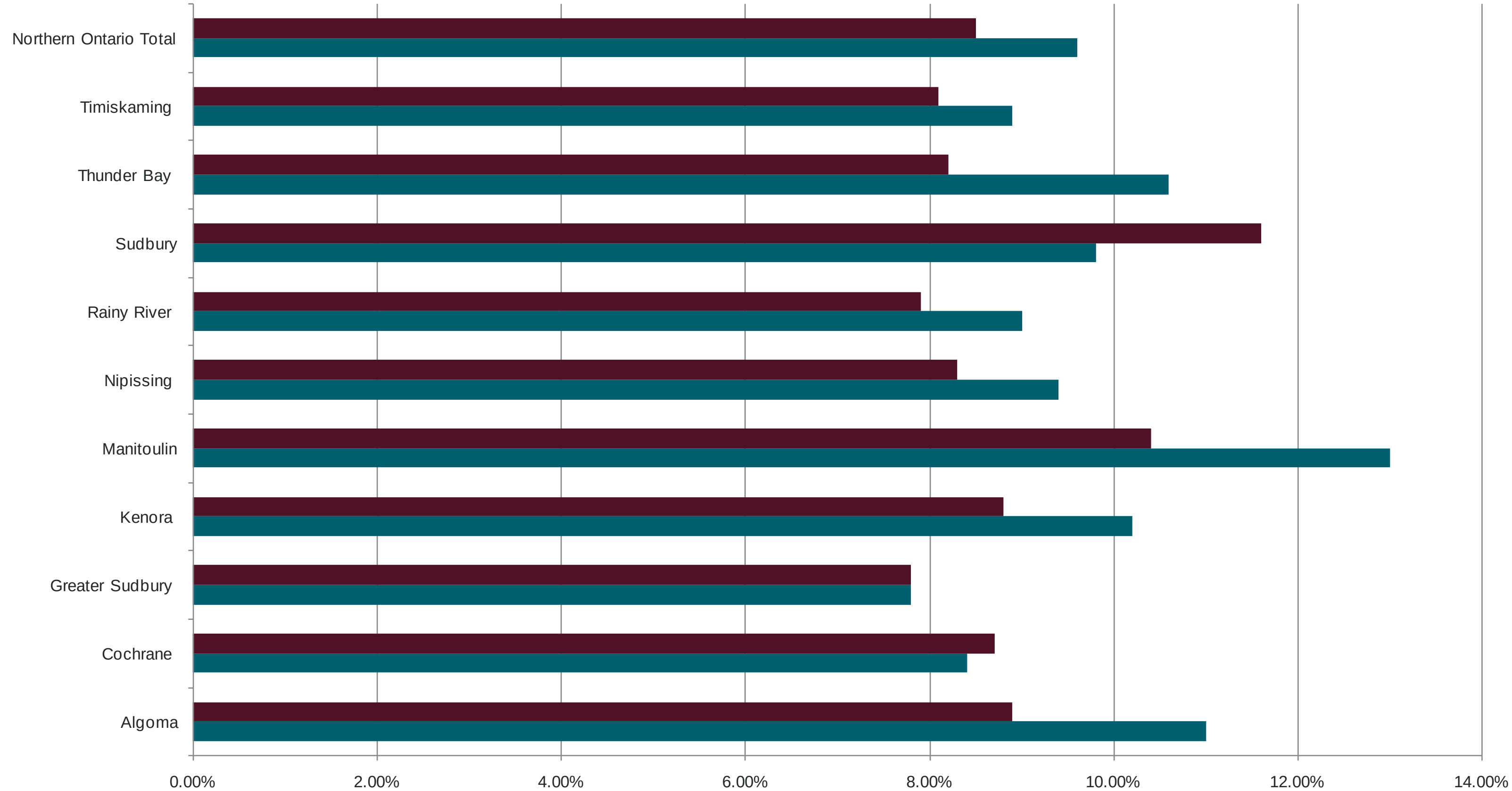


	Algoma	Cochrane	Greater Sudbury	Kenora	Manitoulin	Nipissing	Rainy River	Sudbury	Thunder Bay	Timiskaming	Total Region
Unemployment rate 2011	11.0%	8.4%	7.8%	10.2%	13.0%	9.4%	9.0%	9.8%	10.6%	8.9%	9.6%
Employment rate 2011	50.6%	56.2%	58.1%	57.2%	48.9%	54.8%	54.8%	50.8%	51.3%	56.0%	54.8%
Participation rate 2011	56.8%	61.3%	63.1%	63.7%	56.2%	60.5%	60.2%	56.4%	57.4%	61.5%	60.4%

■ Unemployment rate 2011 ■ Employment rate 2011 ■ Participation rate 2011

Source: Statistics Canada, National Household Survey, 2011.

FIGURE 11 UNEMPLOYMENT RATES ACROSS NORTHERN ONTARIO'S 10 DISTRICTS, 2006, 2011

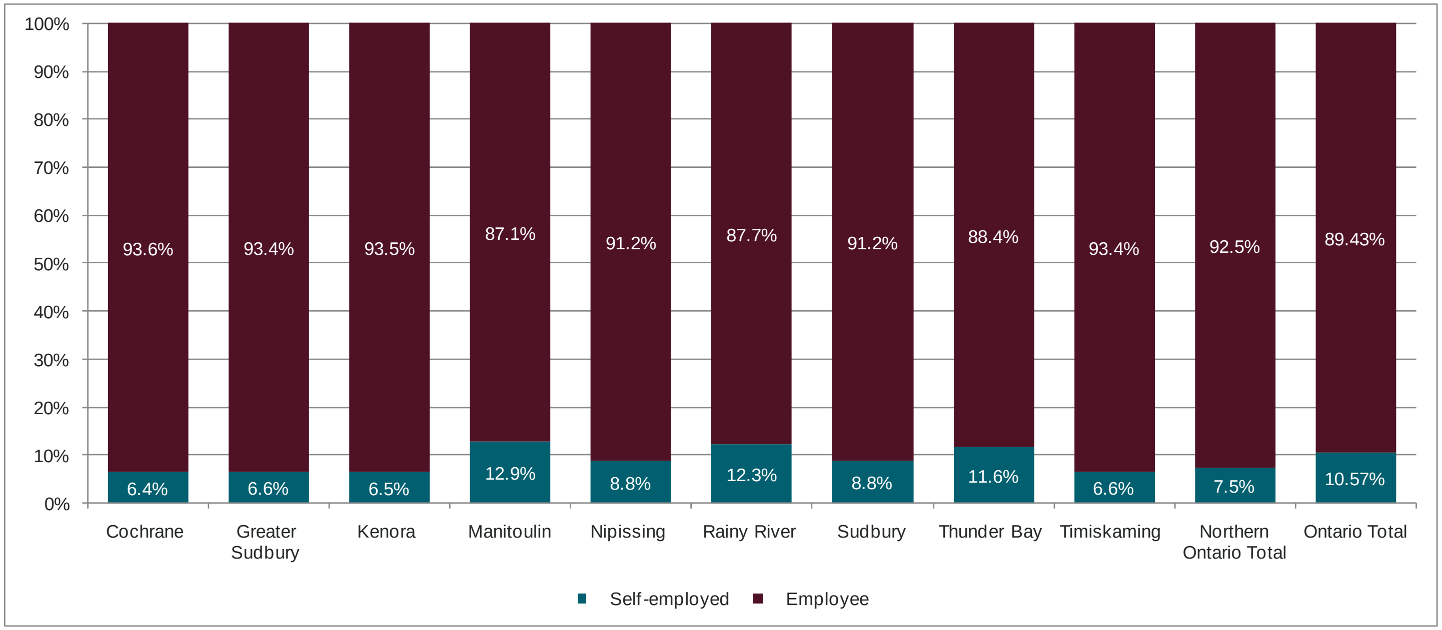


	Algoma	Cochrane	Greater Sudbury	Kenora	Manitoulin	Nipissing	Rainy River	Sudbury	Thunder Bay	Timiskaming	Northern Ontario Total
2006	8.90%	8.70%	7.80%	8.80%	10.40%	8.30%	7.90%	11.60%	8.20%	8.10%	8.50%
2011	11.00%	8.40%	7.80%	10.20%	13.00%	9.40%	9.00%	9.80%	10.60%	8.90%	9.60%

Source: Statistics Canada, National Household Survey, 2011; Statistics Canada, Census, 2006.

Of the labour force across Northern Ontario in 2011, 92.5% were listed as being employees of some form of organization, while only 7.5 % were self-employed. These details are outlined in Figure 12, which compares employee to self-employed worker statuses across the 10 districts. Manitoulin had the highest proportion of self-employed individuals, at 12.9%, followed closely by Rainy River, at 12.3%. The lowest number of self-employed people is the Greater-Sudbury district, with 6.4%. As a point of reference, the provincial average is a self-employment rate of 10.5%, a difference of 3%.

FIGURE 12 TYPE OF EMPLOYMENT ACROSS NORTHERN ONTARIO'S 10 DISTRICTS, 2011



6.5 Northern Ontario Tourism Labour Force Statistics

In collaboration with the project steering committee, the consulting team developed a list of 108 occupations as defined by the National Occupational Classification framework. The complete list of these occupations is presented in Appendix C. The following three figures present a summary of the number of workers employed in the tourism sector as defined by these 108 occupations across Northern Ontario's 10 Districts. These occupations were aggregated under their major occupational groupings. For example, in Figure 13 "Management occupations" include 14 separate occupations ranging from "Financial managers" and "Purchasing managers" to "Restaurant and food service managers".

Given the number workers employed in “Sales and service occupations”, this grouping has been further disaggregated to show its minor occupational groupings. These minor groups also encompass a range of occupations. For example, within the “Service supervisors and specialized service occupations” there are 10 separate occupations ranging from “Food service supervisor” to “Chefs” and “Cooks”.

Figure 13 presents a summary of the number of workers employed in the tourism sector across Northern Ontario’s 10 Districts in 2011. The column to the furthest right, entitled “Northern Ontario” provides the total level of employment for the entire region. These totals provide a useful benchmark to measure each district’s relative share of tourism based employment. Greater Sudbury and Thunder Bay are Northern Ontario’s leaders in terms of overall tourism-related employment. As of 2011, Greater Sudbury supported 28,320 tourism-related jobs while Thunder Bay supported a further 26,375. On the other hand, Manitoulin, Rainy River, and the Sudbury District were the smallest sites for tourism employment.

FIGURE 13 TOTAL TOURISM EMPLOYMENT ACROSS NORTHERN ONTARIO’S 10 DISTRICTS BY NOC, 2011

Occupations by National Occupational Classification (NOC)	Algoma	Cochrane	Greater Sudbruy	Kenora	Manitoulin	Nipissing	Rainy River	Sudbury (District)	Thunder Bay	Timisk'ing	Northern Ontario
0 Management occupations	1,525	935	2,175	535	125	1,065	235	200	1,910	260	8,965
1 Business, finance and administration occupations	4,055	2,790	7,015	1,980	500	3,250	650	545	5,945	965	27,695
2 Natural and applied sciences and related occupations	605	235	760	405	-	505	50	-	840	35	3,435
3 Health occupations	85	80	165	35	45	115	-	-	135	30	690
4 Occupations in education, law and social, community and government services	115	45	145	65	25	125	15	25	235	-	795
5 Occupations in art, culture, recreation and sport	530	280	835	185	90	385	35	30	615	115	3,100
6 Sales and service occupations sub total	**10,895**	**7,205**	**14,985**	**5,030**	**760**	**8,055**	**1,470**	**1,870**	**14,325**	**2,570**	**67,165**
62 Retail sales supervisors and specialized sales occupations	290	145	330	70	-	245	-	50	385	50	1,565
63 Service supervisors and specialized service occupations	1,400	915	2,285	625	140	895	285	210	2,290	330	9,375
64 Sales representatives and salespersons - wholesale and retail trade	1,950	1,350	3,615	755	95	1,875	225	255	2,845	525	13,490
65 Service representatives and other customer and personal services occupations	2,245	1,295	2,495	890	55	1,040	210	305	2,625	370	11,530
66 Sales support occupations	1,595	1,210	2,235	940	130	1,455	205	535	1,875	575	10,755
67 Service support and other service occupations, n.e.c.	3,415	2,290	4,025	1,750	340	2,545	545	515	4,305	720	20,450
7 Trades, transport and equipment operators and related occupations	975	1,020	1,950	545	180	1,055	135	210	1,895	460	8,425
8 Natural resources, agriculture and related production occupations	390	130	290	285	50	260	60	-	475	85	2,025
Total Tourism Occupations	**19,175**	**12,720**	**28,320**	**9,065**	**1,775**	**14,815**	**2,650**	**2,880**	**26,375**	**4,520**	**122,295**

Source: Statistics Canada. 2011 National Household Survey. Adapted by Millier Dickinson Blais Inc.

Figure 14 shows the percentage of tourism employment by occupational categories. Across Northern Ontario the “Sales and service occupational” category constituted the majority of tourism-related employment (54.9%). With the exception of Manitoulin, in each jurisdiction this category accounted for more than 50% of all tourism-related employment. Within the “Sales and service occupational” category the largest minor occupational grouping was “Service support and other service occupations, n.e.c." which captures jobs like food counter attendants and cleaning staff. Across Northern Ontario "Service support and other service occupations, n.e.c." accounted for 16.7% of all tourism-related employment.

"Business, finance and administration occupations" also accounted for a considerable proportion of tourism-related employment. Across Northern Ontario, this category accounted for 22.6% of tourism-related employment. This category reflects jobs like "administrative officers", "payroll clerks", and "professional occupations in advertising, marketing and public relations".

FIGURE 14 TOURISM EMPLOYMENT ACROSS NORTHERN ONTARIO'S 10 DISTRICTS BY NOC SHOWN AS A PERCENTAGE OF TOTAL, 2011

Occupations by National Occupational Classification (NOC)	Algoma	Cochrane	Greater Sudbruy	Kenora	Manitoulin	Nipissing	Rainy River	Sudbury (District)	Thunder Bay	Timisk'ing	Northern Ontario
0 Management occupations	8.0%	7.4%	7.7%	5.9%	7.0%	7.2%	8.9%	6.9%	7.2%	5.8%	7.3%
1 Business, finance and administration occupations	21.1%	21.9%	24.8%	21.8%	28.2%	21.9%	24.5%	18.9%	22.5%	21.3%	22.6%
2 Natural and applied sciences and related occupations	3.2%	1.8%	2.7%	4.5%	0.0%	3.4%	1.9%	0.0%	3.2%	0.8%	2.8%
3 Health occupations	0.4%	0.6%	0.6%	0.4%	2.5%	0.8%	0.0%	0.0%	0.5%	0.7%	0.6%
4 Occupations in education, law and social, community and government services	0.6%	0.4%	0.5%	0.7%	1.4%	0.8%	0.6%	0.9%	0.9%	0.0%	0.7%
5 Occupations in art, culture, recreation and sport	2.8%	2.2%	2.9%	2.0%	5.1%	2.6%	1.3%	1.0%	2.3%	2.5%	2.5%
6 Sales and service occupations sub total	**56.8%**	**56.6%**	**52.9%**	**55.5%**	**42.8%**	**54.4%**	**55.5%**	**64.9%**	**54.3%**	**56.9%**	**54.9%**
62 Retail sales supervisors and specialized sales occupations	1.5%	1.1%	1.2%	0.8%	0.0%	1.7%	0.0%	1.7%	1.5%	1.1%	1.3%
63 Service supervisors and specialized service occupations	7.3%	7.2%	8.1%	6.9%	7.9%	6.0%	10.8%	7.3%	8.7%	7.3%	7.7%
64 Sales representatives and salespersons - wholesale and retail trade	10.2%	10.6%	12.8%	8.3%	5.4%	12.7%	8.5%	8.9%	10.8%	11.6%	11.0%
65 Service representatives and other customer and personal services occupations	11.7%	10.2%	8.8%	9.8%	3.1%	7.0%	7.9%	10.6%	10.0%	8.2%	9.4%
66 Sales support occupations	8.3%	9.5%	7.9%	10.4%	7.3%	9.8%	7.7%	18.6%	7.1%	12.7%	8.8%
67 Service support and other service occupations, n.e.c.	17.8%	18.0%	14.2%	19.3%	19.2%	17.2%	20.6%	17.9%	16.3%	15.9%	16.7%
7 Trades, transport and equipment operators and related occupations	5.1%	8.0%	6.9%	6.0%	10.1%	7.1%	5.1%	7.3%	7.2%	10.2%	6.9%
8 Natural resources, agriculture and related production occupations	2.0%	1.0%	1.0%	3.1%	2.8%	1.8%	2.3%	0.0%	1.8%	1.9%	1.7%
Total Tourism Occupations	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Statistics Canada. 2011 National Household Survey. Adapted by Millier Dickinson Blais Inc

Figure 15 shows the proportion of employment in each district's occupational categories compared to the proportion of employment across Northern Ontario as a whole. The values shown in the figure below represent the "location quotient" or "LQ" for each occupational category when compared against Northern Ontario. Those occupations with a location quotient with a value greater or equal to 1.25 indicate a concentration of employment activity that is greater than the overarching region and may indicate a competitive advantage. A location quotient of 0.75 or below suggests that a jurisdiction is proportionally under employing a particular occupational grouping. A low location quotient may present an opportunity for a new entrant or indicate strong regional competition in that occupation or corresponding industry.

The figure is meant to be read horizontally to compare each occupational category in one district to the others. This occupational data should be interpreted with caution, given the relatively low levels of employment in some jurisdictions. For example, in the case of Manitoulin and Rainy River, there is a greater likelihood of high or low LQs because of their smaller tourism workforce. Moreover, larger centres like Greater Sudbury and Thunder Bay are more likely to yield LQs close to 1.0, given that they account for a large share of Northern Ontario's tourism-related employment. Nevertheless, Figure 15 highlights the LQs in each district that indicate a relative lack of employment or to a relative concentration of employment for each occupational category.

FIGURE 15 TOURISM EMPLOYMENT ACROSS NORTHERN ONTARIO'S 10 DISTRICTS BY NOC SHOWN BY LOCATION QUOTIENT, 2011

Occupations by National Occupational Classification (NOC)	Algoma	Cochrane	Greater Sudbruy	Kenora	Manitoulin	Nipissing	Rainy River	Sudbury (District)	Thunder Bay	Timisk'ing
0 Management occupations	1.08	1.00	1.05	0.81	0.96	0.98	1.21	0.95	0.99	0.78
1 Business, finance and administration occupations	0.93	0.97	1.09	0.96	1.24	0.97	1.08	0.84	1.00	0.94
2 Natural and applied sciences and related occupations	1.12	0.66	0.96	1.59	0.00	1.21	0.67	0.00	1.13	0.28
3 Health occupations	0.79	1.11	1.03	0.68	4.49	1.38	0.00	0.00	0.91	1.18
4 Occupations in education, law and social, community and government services	0.92	0.54	0.79	1.10	2.17	1.30	0.87	1.34	1.37	0.00
5 Occupations in art, culture, recreation and sport	1.09	0.87	1.16	0.81	2.00	1.03	0.52	0.41	0.92	1.00
6 Sales and service occupations sub total	**1.03**	**1.03**	**0.96**	**1.01**	**0.78**	**0.99**	**1.01**	**1.18**	**0.99**	**1.04**
62 Retail sales supervisors and specialized sales occupations	1.18	0.89	0.91	0.60	0.00	1.29	0.00	1.36	1.14	0.86
63 Service supervisors and specialized service occupations	0.95	0.94	1.05	0.90	1.03	0.79	1.40	0.95	1.13	0.95
64 Sales representatives and salespersons - wholesale and retail trade	0.92	0.96	1.16	0.76	0.49	1.15	0.77	0.80	0.98	1.05
65 Service representatives and other customer and personal services occupations	1.24	1.08	0.93	1.04	0.33	0.74	0.84	1.12	1.06	0.87
66 Sales support occupations	0.95	1.08	0.90	1.18	0.83	1.12	0.88	2.11	0.81	1.45
67 Service support and other service occupations, n.e.c.	1.07	1.08	0.85	1.15	1.15	1.03	1.23	1.07	0.98	0.95
7 Trades, transport and equipment operators and related occupations	0.74	1.16	1.00	0.87	1.47	1.03	0.74	1.06	1.04	1.48
8 Natural resources, agriculture and related production occupations	1.23	0.62	0.62	1.90	1.70	1.06	1.37	0.00	1.09	1.14

Source: Statistics Canada. 2011 National Household Survey. Adapted by Millier Dickinson Blais Inc

From this analysis, the most pronounced LQs are found in Manitoulin, Rainy River, and the Sudbury District. Manitoulin has notable concentrations of employment in the health sector and other public sector occupations but limited employment in sales and service occupations. Rainy River, on the other hand, has limited employment in tourism-related health based occupations but has concentrations of employment in the 'service supervisors and specialized service' occupational category. Finally, the Sudbury District has its strongest LQs in 'sales and support occupations,' but is relatively deficient in technical occupations related to 'natural and applied sciences and related occupations,' 'health occupations,' and 'natural resources, agriculture, and related production occupations.'

Appendix B: Consultation Findings

7 Stakeholder interview findings by theme

The methodology for stakeholder interview consultations consisted of 18 one-on-one telephone interviews. These interviews were semi-structured and ranged from 30 to 60 minutes in length. The interview guide was designed to understand the specific training required to support tourism operators and their staff. These interviews also broached issues of training delivery, capacity, and access. Finally, these interviews elicited feedback on the broader perceptions of TNO as a potential co-ordinating body and facilitator of tourism-related training across Northern Ontario.

This consultation process was implemented during March 2014 and directed at industry operators, trainers and educators, tourism program coordinators, tourism sector representatives, municipal tourism co-ordinators, employment Ontario service providers, and representatives from workforce planning boards.

The following section presents the relevant findings from these interviews. Appropriate comments have been grouped thematically. They are derived from interview notes and express the perspectives of the respondents. Any redundant comments have been omitted for brevity.

7.1 Elevate the Awareness and Understanding of Training and Associated Certifications

7.1.1 Increase awareness of the value of training for both employers and employees

Several interview participants highlighted the perceived lack of value of training or skills development resulting from relatively poor employer awareness and up-take. The following interview excerpts provide context for such views:

- Beyond any one type of programming or training we need to demonstrate the value of certain accreditation, certification and training to employers. Once again, we need to develop and promote the value proposition of what this training means for employers and their staff. In other words, we need to answer the question, “what is in it for the employer to send their employees for training?” On the other hand, we need employers to recognize the value of the certification as to encourage employees themselves to attend training opportunities.

- Underlying everything is the need for increased awareness of the types of certification and accreditation available across Northern Ontario. Considerable resources should be allocated to promote the value of certifications and what training can do for employees and operators. Put simply, we need the employer to understand certification. Without this understanding its value is of limited use to a potential employee.
- From the employers' perspective, the question is always, "what is in it for me? How is this relevant for my staff? And how is this going to increase the productivity or effectiveness of my staff?"
- For any education program for *employees*, we need to know why it works for employers. The industry needs to be educated as to what is offered. If I see value in the program they're being taught, I'm more likely to hire them as a graduate.
- Succession planning and business planning is tremendously important to sustaining the (tourism) sector, but once again the challenge becomes getting the operators to see the value of this type of work. It all comes back to the awareness campaign and the value proposition of such training and business principles.
- We need to develop an inventory of tools and resources and make DMOs [destination marketing organizations] aware of them, and engage them better because nobody knows what anybody is doing. Businesses just don't know what is out there.

7.2 Communication and Technological Challenges

7.2.1 Increasing effective communications for employers and trainers

Communication problems related to technology and employers were also themes that emerged from the interviews. For example:

- The challenge is getting sustained up-take of tourism-related programming and training on the part of employers and their staff. We are talking about engagement difficulties, especially with those owner/operators who are nearing retirement. These demographic realities pose a real challenge to rolling out new programming, especially in programming that relates to the internet or new technologies. These older owner operators have been doing things the same way for decades and they are reluctant to change.
- Trainers and Tourism Northern Ontario need to use twitter and what-not to get the youth involved and aware about resources. They need to be engaged in the social network; that's where youth can learn about skill development opportunities.

7.2.2 Increasing communications and collaboration across the sector

Another communications-related issue is associated with communication across different segments of the sector. For example:

- Operators tend to operate in relative isolation without a firm grasp of the broader industry trends and challenges. Different industry sectors tend to maintain their silos, which serves to discourage creative promotional activities such as bundled packages with support from several complimentary businesses.

7.2.3 Operators are lagging with respect to technology

- The mentality of some many of these operators is centred on preserving the status quo, but these operators are not keeping pace with the change happening around them. Operators are especially lagging with respect to incorporating new technologies and new forms of communication.
- The trend is also identified by the Ontario Tourism Workforce Development Audit, which identified a number of situations where businesses were not able to provide training for their staff due to geographic distance, lack of resources, and inability to provide time off for attending training. The use of technology is recognized as one way to mitigate the impact of these barriers. Online courses, web-based workshops, and self-directed training can all contribute to broader accessibility for training and development of staff. In addition, technology can support the industry in sharing and accessing information and resources.
- We need more opportunities to explore partnership, online learning approaches, and modified delivery approaches. There is a need for inexpensive distance training that would allow people to quickly gain the skills necessary to acquire and retain entry level positions, including soft skill training, customer service, and basic workplace numeracy and computer literacy.

7.3 Tourism Training Areas

7.3.1 Employment Fundamentals and basic soft skills

Employability skills and soft skills - Universally, these skills were emphasized by operators and key stakeholders. Several interview participants echoed the sentiment, “You hire for attitude and train for skill.” Employers realize that gaps in technical skills can be learned on the job, whereas soft skills are often seen as difficult and onerous to teach. Some respondents expressed that these basic skills are the primary reasons to hire or fire someone.

Moreover, in a recent report, the Canadian Council of Chief Executives reinforced the importance of these soft skills by identifying them as the number one evaluation tool for potential entry level hires. Accordingly, those who may have strong technical skills are ending up unemployed or underemployed, lacking the ability or opportunity to develop these essential employability skills.

- A successful example of this programming has been rolled out through Algoma District Services Administration Board (ADSAB) and builds from *Supportive Approaches through Innovative Learning* (SAIL).
- **Literacy and numeracy training** – to a lesser extent, interviewees suggested the labour pool supporting the tourism sector's entry level positions require adult literacy training.
- There is a general disconnect between the supply of labour and expectations of employers. In other words, there is a dis-connect between the quality of the labour force across northern Ontario to meet the demands of the tourism industry. More specifically, the labour pool often falls short of the expectations of owner/operators in the Tourism industry or has unrealistic perceptions of entitlement. As one respondent said, "There is a general lack of desire to do the entry level jobs for low wages, a sense of entitlement to better jobs and higher pay without the work ethic or drive to start at the bottom and build experience."

7.3.2 Tourism specific – base line training programs:

These programs and credentials were emphasized by operators and key stakeholders as being fundamental for most entry level employees in the tourism sector.

- Service excellence **–** the module was revamped in 2011 with a considerable portion of customer service training
- "In good hands" Health, food and safety
- WHIMIS – workplace hazardous materials information system
- Smart Serve

7.3.3 Advanced Tourism Training:

- **Customer Service Training-** Customer service skills (how to interact with clients, regardless of position or job-role) require improvement. The standardized forms of customer service training are insincere and seem to fail in their objective of imparting the true value of customer service.
- **Regional Awareness Training-** As an example, the "first impressions community exchange program" also highlights the need for regional awareness campaigns and customer service initiatives within frontline tourism workers. Generally speaking, a lot of Northern Ontario front line workers expressed negative thoughts or perspectives on the community in which they work. This is something that needs to improve as it can greatly affect the broader industry.

- **Cross-sector promotional training-** This type of training has tremendous potential to change the face of the tourism industry in Northern Ontario. This speaks directly to increase collaboration and partnerships, but facilitating the necessary industry buy-in is always the challenge.

7.3.4 Management/Business Owner Training:

- **Succession planning and mentoring training:**
    - One of key challenges faced by the sector relates to those “burned-out operators” who are just hanging on to a business. These operators are doing the rest of the operators a disservice because they taint the broader perception of Northern Ontario’s tourism sector. In response, we need more concrete and effective succession planning, which goes hand-in-hand with customer service.
    - As an example, while at an outdoor show there were many operators in their own booths at 10:00am on Saturday morning, and they were sitting back and relaxing with a beer in their hand waiting to field questions. This is not the type of image that we want to convey to potential new customers.
    - These “burned out” operators need a new challenge in life. They need a new business goal, and they need to be supported to sell their business. In this respect, the time to get out of the business is not when it's failing or when it's about to fail. Instead, the time to get out of the business is when it’s profitable and when an operator is ready to mentor someone to take over the business.
    - Finally, we need to ensure operators do not feel like they’re alone in managing and operating the wrong business. Accordingly, we need to provide supports for these small operators, and we need to make them understand that cooperation will “raise all boats.”
    - FedNor could be approached to implement the mentoring training program and investment planning.
- **“Good boss” and Mentoring training:**
    - There is a need to supplement the current course offerings with practical programming related to "what operators should look for in staff when succession planning" and how operators renew and reward their best employees. In a similar vein, we need Human Resource training to support the increase in capacity within this sector and to reward “star staff.” This could be supported by effective mentoring programs and models to follow.
    - Simply put, we need workshops for employers on “how to be a good boss and how to be a good mentor.”
- **Business planning / small business management:**

- All too often, operators are focused on the experience and product, but fail to appreciate the “million” other things that are required to run and sustain a successful business. A “Small Business 101” course is required.

- **Product Development / product quality assurance / renewing product offerings:**
  - Long-standing operators can be laggards when it comes to technological update and product development relating to online marketing and booking. They are afraid to take the risk. There is a need to get these people up to speed because “operators will not survive without a firm understanding of the appropriate tools to leverage.”
  - Long-standing operators also have a tendency to preserve the status quo. As a result, products can feel “dated” and “out of touch.” With few exceptions, businesses must continually invest in their product to renew and refresh what has worked in the past. The user experience should always be improved: “Customers will not come back if they are forced to sleep on a 30 year old mattress.”

- **Knowing your market and target audience:**
  - Operators need to know the market and adjust their product accordingly. There is also a need to identify future markets.

7.3.5 Need to make Training Options Easier to Navigate (training portal and training calendar)

A dominant theme of interviews was the expression of frustration toward the complexity of navigating the various websites and portals associated with skills development and training, including Tourism Northern Ontario. Many respondents seemed overwhelmed or frustrated with the enormity of information. The following excerpts provide insight into the relationship between operators and training resource information.

- Another challenge is owner-operators can be easily overwhelmed by the volume of different types of training available to them.

Practice solutions are required to support access to relevant training options. Two potential solutions include:

- **A comprehensive online tourism-related training portal**- This portal should contain a series of links to relevant training programming. It is important that this portal does not provide specific course links which may overwhelm a potential visitor. Instead, the portal should describe types of training available from different training institutions and how they might relate to the user. This will reduce the need for regular site-maintenance while driving traffic to the relevant training providers.

- **An annual tourism-related training calendar** could be created and distributed across the sector, with an emphasis on events lasting fewer than five days. The calendar would allow for potential users to plan ahead and systematically attend relevant training programs. Alternately, operators may plan to have their staff attend particular training opportunities. Ideally, the information in this calendar would include the trainer or training provider, the intended audience, the purpose of the training, and any pertinent logistical details.
    - This form of communication is viewed as the most efficient and effective means of ensuring buy-in from regional training providers and municipally based organizations.
    - TNO could provide this calendar strictly with tourism programming identified, but if shared in an edit enabled format, partnering organizations could also integrate their own training and programming.

7.3.6 Is TNO best positioned to facilitate or co-ordinate training initiatives?

When asked, “is TNO best positioned to facilitate or co-ordinate training initiatives?” the interview participants voiced diverging opinions. Generally speaking, responses fell into the following categories.

- **TNO is well-positioned to reach out to operators and spearhead this type of training initiative**. The emphasis should be around a year-long calendar with training options available, and they should be run at least two or three times to give different operators a chance to attend. We need to make this training standard across Northern Ontario. Accordingly, there is a need to move away from one-off, piecemeal solutions, which has characterised the training landscape for the last decade or more. Therefore, training should be broken down into consistently offered modules so as to not overwhelm individual operators.
- **TNO is well-positioned to serve as a sanctioning body and as a facilitator**, **but it must work through its various training partners to actually operationalize this type of training**. Therefore, the TNO should be an organizational body and facilitator, but should stay clear of actual training delivery. Organizations such as OTEC are best positioned to actually deliver the training.
- **TNO is not yet well-positioned to serve as a sanctioning body or facilitator of training**. In this regard, there is a danger of TNO trying to do too much too soon. It is a relatively new organization with limited, albeit growing, credibility in the tourist industry. At this juncture, operators still have a bitter taste in their mouth from the decline of the Destination Marketing Organization and are still trying to understand the role of TNO. Accordingly, TNO is not well-positioned to be the coordinating body or facilitator of training delivery. Instead an organization like OTEC, or other training organizations such as colleges, workforce planning boards, Ontario Employment providers are better suited to actually promoting and rolling out this training. Moreover, local chambers of commerce and major employers such

as hoteliers or any other industry recognizable groups would be a better position than TNO to facilitate and roll out training (as described above).

- **TNO is not yet well-positioned to serve as a sanctioning body or facilitator of training.** Instead, TNO should seek to leverage and support existing networks across northern Ontario which have established relationships to industry and access to training dollars. The workforce planning boards across northern Ontario are well-positioned to support TNO in this training initiative. The workforce planning Boards should be engaged from the outset in developing and strategizing around operationalizing the specific training outcomes of the strategy and report. TNO is still somewhat new, so leveraging the established credibility of workforce planning boards will go a long way to supporting this type of initiative. Other organizations to involve include FedNor and municipal economic development offices.

7.3.7 Increase collaboration between industry and educators

- Engage the Ministry of education and local school boards to stimulate interest in entrepreneurship and to impart the relevant skills required by the tourism sector. There is a need to investigate the opportunity for increased numbers of co-op opportunities, placements, and apprenticeships.

7.3.8 Lessons learned about effective training delivery

- The ideal way of rolling out training is through workshops, but these workshops should be designed to allow for repeating modules with one building on the next. In this scenario, operators can go to a workshop and then go to the second phase of the workshop once they have had a chance to go home and actually apply their training.
- The tourism-related aboriginal skills and training programs across northern Ontario are well received and should be integrated within the strategy.
- With respect to actual course delivery– The most effective providers and trainers have regional context and are able to adapt standardized content to the local setting.
- Contact North is well regarded and has been effective in offering quality programming to isolated locations. Accordingly, Contact North should be integrated within the strategy.

7.3.9 Programming moving forward

- Generally speaking, the relevant training materials and curricula have already been developed. Moving forward, it will be necessary to increase training capacity at the local levels to reach those hard to reach operators. In other words, there is a need to spend money on hiring facilitators and trainers at the local level, not developing new course content.

- Content is already well developed (perhaps without regional awareness training). Tourism Niagara has an interesting model; therefore, "become an ambassador Niagara" may be a potential model to investigate.

8 Operator Survey Results

8.1 Introduction

An on-line survey was distributed to tourism operators in Tourism Northern Ontario's (RTO 13) coverage area with the intent of gathering quantifiable data on skills demand, training challenges, businesses training/professional development offerings, and recruitment strategies facing Northern Ontario's tourism sector. The survey was targeted to a broad audience to gather a wide range of quantifiable data.

8.2 Project Organization, Data Analysis, and Methodology

This section summarizes the survey results of 95 tourism operators across RTO 13's coverage area. These businesses offer services such as accommodations, restaurants, travel, and attractions. Participants were asked to complete the survey between late January 2014 and early March 2014.

The survey was structured to identify issues in key areas such as:

- Future hiring needs
- Skills and knowledge gaps among staff
- Human resources needs
- Implementing training
- Company Profile

Within these key areas there are 27 detailed questions. The results of these questions are summarized in the next section with selected variables cross-tabulated[17] to better understand survey responses. The survey tools used for analysis were Microsoft Excel and Survey Monkey. The survey questions elicited both qualitative and quantitative responses.

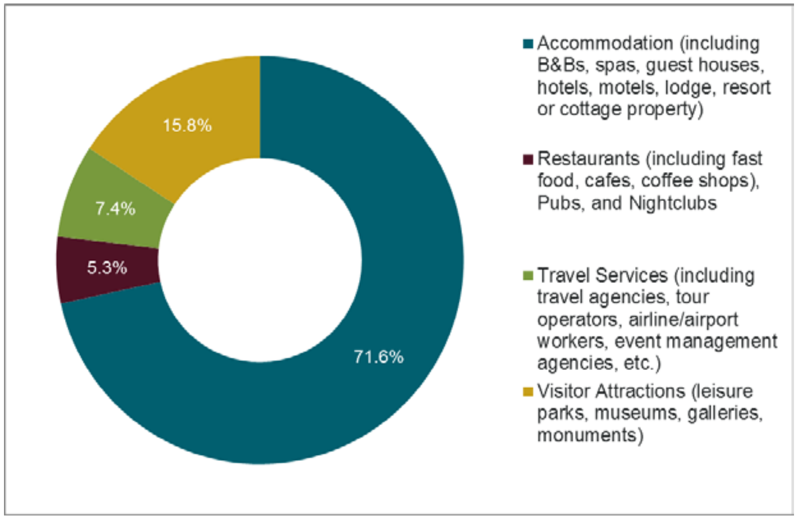
[17] Cross-tabulation refers to the investigation of one question based on the response of another question.

8.3 Survey Findings

8.3.1 Business profile

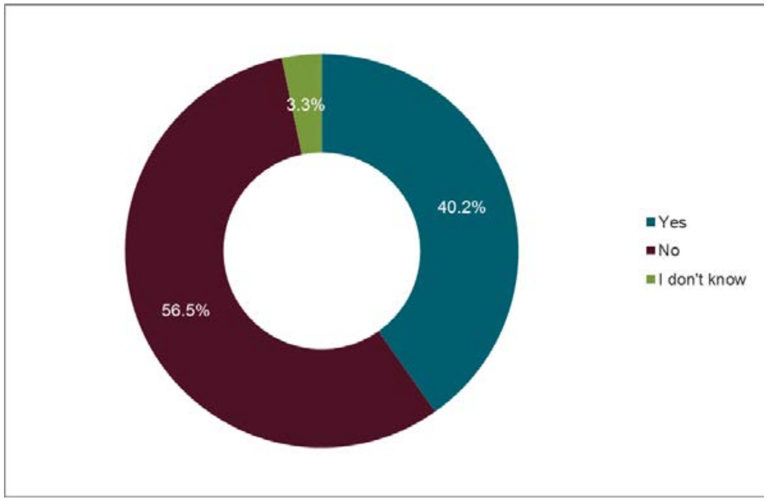
Figure 16 illustrates the main businesses activity of the survey participants. The accommodations subsector comprised the majority of businesses surveyed at 71.6%, while the visitor attraction category was the next highest at 15.8%.

FIGURE 16: MAIN BUSINESS ACTIVITY



Tourism operators gave mixed responses when asked, “if their labour force needs have changed in the past 12-24 months”. Although a majority of respondents answered ‘No’ at 56.5%, a significant portion also answered ‘Yes’ at 40.2%.

FIGURE 17: LABOUR FORCE NEEDS WITHIN PAST 12-24 MONTHS



8.3.2 Future Hiring Needs

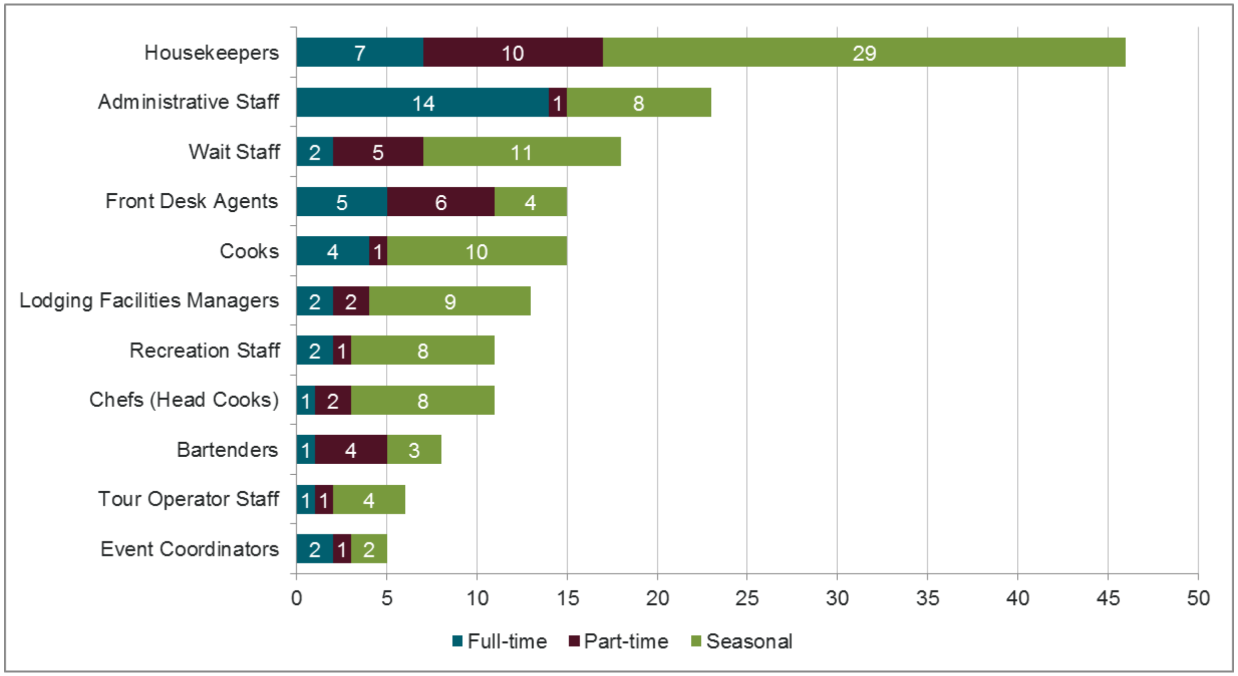
This section presents responses to questions regarding the future labour force needs of tourism businesses in RTO 13's coverage area. Respondents were asked questions regarding occupational needs, recruitment, and internships.

Hiring & Recruitment by Occupation

Participants were asked to identify the types of occupations they intend to hire for 2014-2015 on a full time, part time, and seasonal basis. Respondents had 24 occupations to choose from. While identifying the occupations, the participants were also asked to indicate the number of employees they planned to hire for each occupation. The vast majority of businesses indicated that they would be hiring 1-4 employees for all occupations. Out of the 206 total responses, there were 13 responses that indicated a few occupations that needed more than four employees, which are discussed in further detail below.

Figure 18 shows the occupations that were identified in needing 1-4 employees and had a minimum of five responses. Looking at all employment levels, the highest ranking occupations were housekeepers (46), administrative staff (23), and wait staff (18). The chart also shows that for most occupations, seasonal employment received more responses when compared to full-time or part-time employment.

FIGURE 18: FUTURE OCCUPATIONAL NEEDS BY EMPLOYMENT LEVEL FOR 1-4 EMPLOYEES



The figure below shows the occupations identified by employers as part of their hiring outlook, requiring four or more employees. The majority of these respondents indicated they plan on hiring 5-9 employees. It should also be noted that housekeepers and recreation staff were two occupations requiring more than four employees at the full-time and seasonal level.

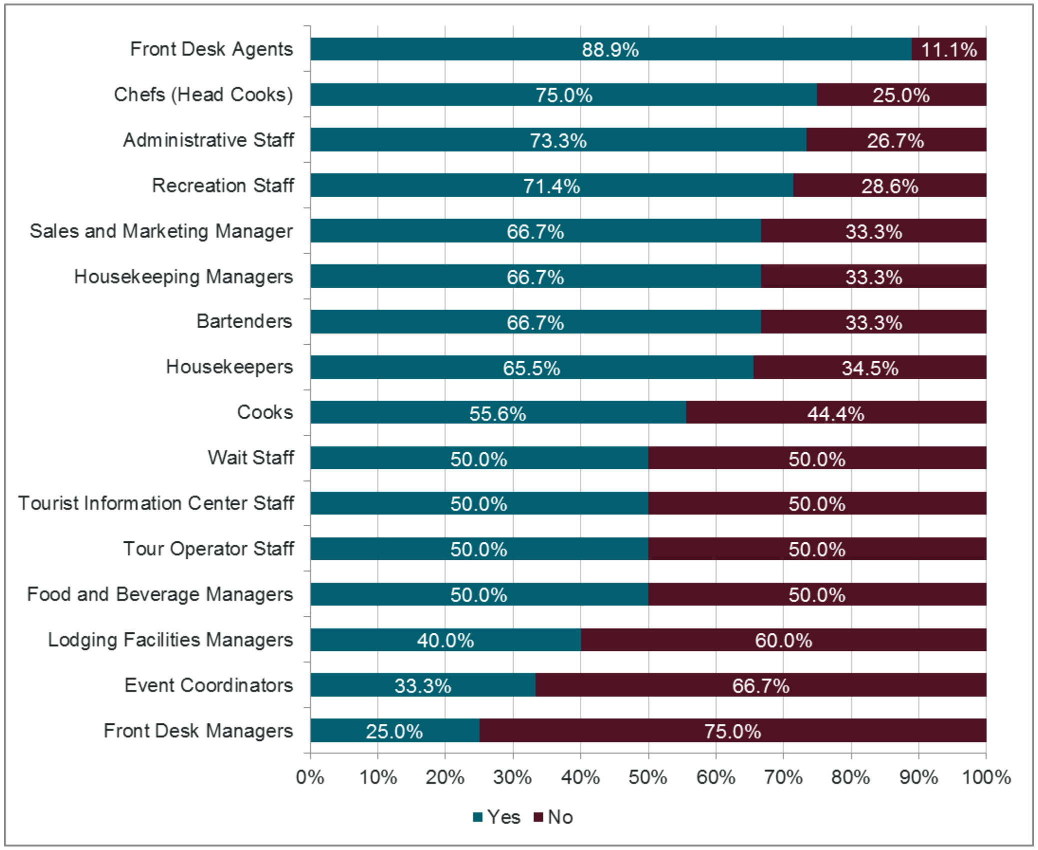
FIGURE 19: FUTURE OCCUPATIONAL NEEDS BY EMPLOYMENT LEVEL FOR MORE THAN FOUR EMPLOYEES

Occupation	Employment Level	Number of Employees			
		5-9	10-14	15-19	20 or more
Housekeepers	Full-Time	1	1	1	0
Recreation Staff	Full-Time	0	0	0	1
Housekeepers	Part-time	2	0	0	0
Tour Operator Staff	Part-time	1	0	0	0
Wait Staff	Part-time	1	0	0	0
Housekeepers	Seasonal	3	0	0	0
Recreation Staff	Seasonal	1	0	0	0
Tourist Information Center Staff	Seasonal	0	1	0	0
Total	N/A	9	2	1	1

Participants were also asked to highlight the occupations for which they anticipate difficulty in finding qualified employees. For each occupation, respondents had the option of selecting “yes” or “no”. The selection of the “yes” option indicated the occupation was difficult to fill. Figure 20 highlights only those occupations that were difficult to fill and received greater than three responses. The highest ranking occupations identified as being difficult to fill were front desk agents (88.9%), chefs (75.0%), administrative staff (73.3%), and recruitment staff (71.4%). Thirteen out of the 24 occupations obtained a response of 50% or greater as being a difficult to fill.

It should be noted, housekeeping, administrative staff, and front desk agents were the highest ranking occupations identified in finding qualified staff and hiring 1-4 employees. Generally speaking, the gap between the skill levels amongst the workforce and hiring needs for these occupations suggest that more training/education will be required to fill these jobs.

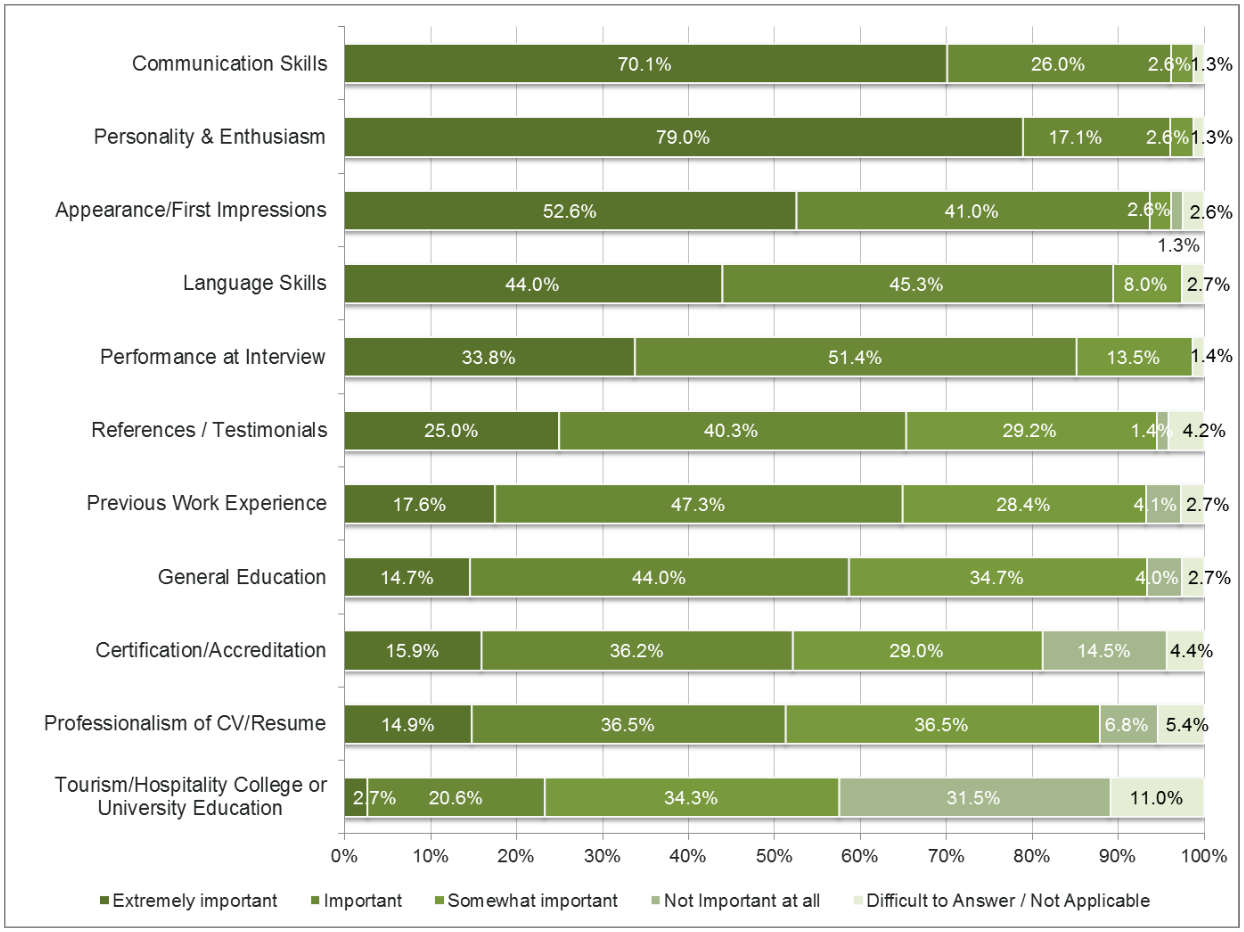
FIGURE 20: RECRUITMENT DIFFICULTIES BY OCCUPATION



Factors affecting Recruitment

When asked to rank a range of factors that were important when recruiting staff, employers offered a range of answers. The most highly ranked factors were “communication skills” (96.1%), “personality & enthusiasm” (96.1%), and “appearance/first impressions” (93.6%) as participants stated they were extremely important or important. The next two highest factors were “language skills” (89.3%), and “performance at interview” (85.2%). Amongst factors ranked as being not important at all, “tourism/hospitality college or university education” (31.5%), and “certification/accreditation” (14.5%), received the highest responses.

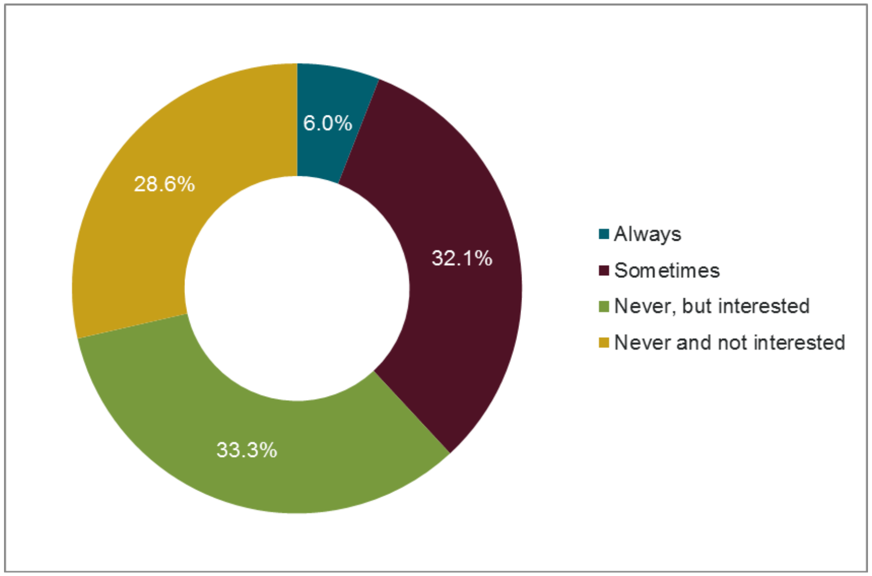
FIGURE 21: FACTORS IMPORTANT IN RECRUITMENT



Internships

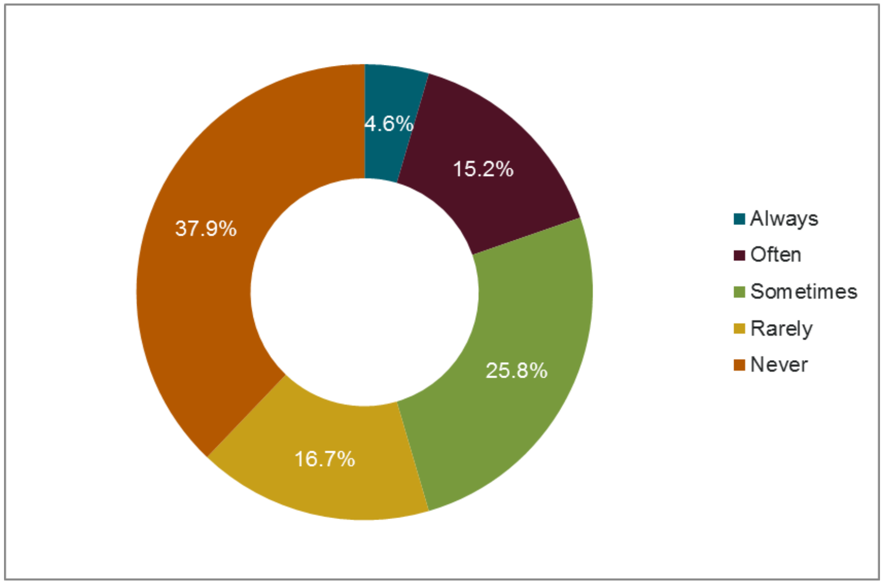
Out of 84 participants, 6.0% of businesses always offered internships, while 32.1% of operators sometimes offer internships. The remaining 61.9% of participants indicated they never provide an internship.

FIGURE 22: DO YOU OFFER INTERNSHIPS FOR STUDENTS?



As a follow up, businesses were asked if student interns had later been hired. Out of the 66 responses, a significant portion of operators (54.6%) responded by indicating their establishment never or rarely hired interns. However, some interns do find employment with their work placement as a quarter of operators hired interns “sometimes,” while a fifth of businesses hired interns “always” or “often”.

FIGURE 23: HAVE STUDENTS THAT HAVE BEEN INTERNS LATER BEEN HIRED?



8.3.3 Skills and Knowledge Gaps amongst Staff and Operators

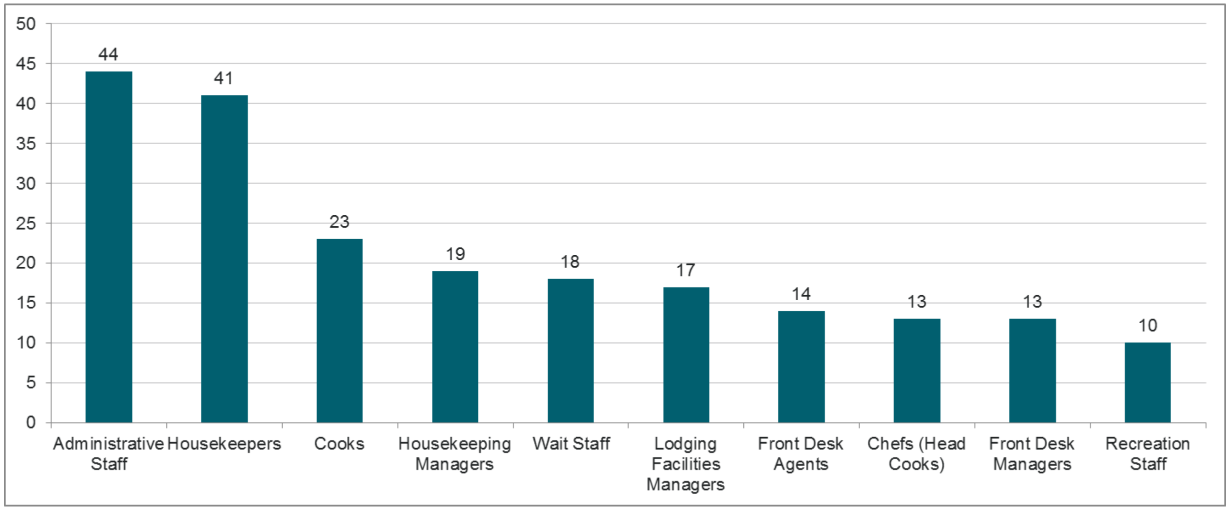
This section presents participants' responses to questions regarding current skill levels amongst staff and tourism knowledge of operators.

Staff Skill Level

Businesses were asked to rank the staff skills levels of their staff for various occupations. For this question, participants were able to select a ranking for each of the 24 occupations, which led to a high number of total responses (726). Figure 24 shows the top 10 occupations identified as having "good" or "excellent" skill levels. Amongst occupations ranked as being good or excellent, administrative staff and housekeepers received the most responses at 44 and 41, respectively. The next three highest occupations were cooks (23), housekeeping managers (19), and wait staff (18).

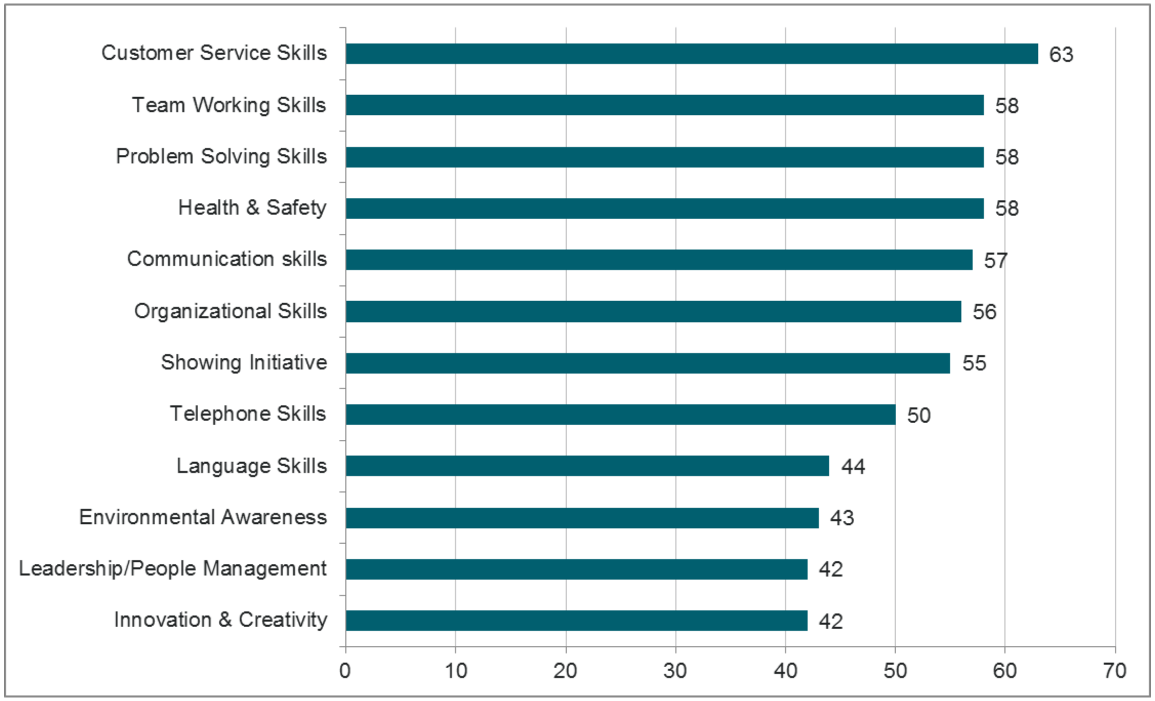
Amongst occupations that were ranked as being "poor" or "very poor," housekeeper received the most responses at six and was the only occupation to receive more than five votes.

FIGURE 24: OCCUPATIONS WITH GOOD/EXCELLENT SKILL LEVELS



Participants were also asked to rank the importance of various skill areas that needed improvement amongst current and future staff. For this question, participants were able to select a ranking for each of the 24 skill areas which lead to a high number of total responses (1,440). Figure 25 shows the top 12 skill categories that were identified as being rather or extremely important. Amongst the skill improvements that were ranked as being the most important, “customer service” skills received the most responses at 63. The next highest ranking skills were “team working” skills, “problem solving” skills, and “health & safety”, which each received 58 replies. Amongst skills improvements that were ranked as being the least important, the most commonly cited skills were “IT” skills (25), “web design/maintenance” (24), and “procurement” (23).

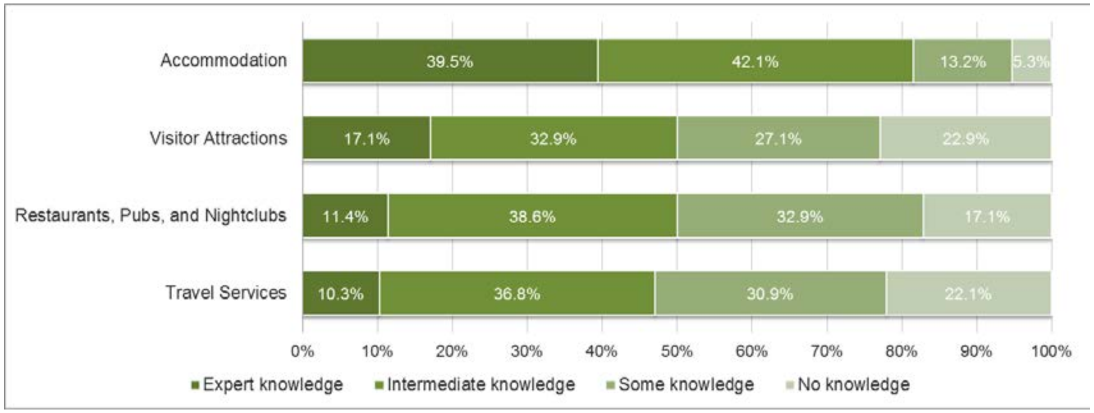
FIGURE 25: SKILLS IDENTIFIED AS BEING RATHER OR EXTREMELY IMPORTANT TO IMPROVE



Employer Knowledge Level

Participants were asked to indicate their level of knowledge in four subsectors in the tourism industry. Employers had the most expert knowledge in the accommodation (39.5%) and visitor attractions (17.1%) subsectors. This pattern reflects the main business activities of establishments as accommodations and visitor attractions comprised the majority of surveyed businesses. Visitor attractions (22.9%) and travel services (22.1%) were the subsectors in which participants had the least amount of knowledge.

FIGURE 26: TOURISM SUB-SECTOR EMPLOYER KNOWLEDGE LEVEL



Employers were also asked to rank the importance of various knowledge areas they would like to upgrade. For this question, participants were able to select a ranking for each of the 39 knowledge areas, which led to a high number of total responses (2,254). Figure 27 displays the top 10 knowledge areas identified as being “rather important” or “extremely important.” Participants placed the most importance on business planning (53) and accountancy/budgeting/financial management skills (51). The next highest ranking knowledge areas were business management (49), customer service (48), and marketing (44).

Amongst knowledge areas that were ranked as being the least important “bartending training” received the highest responses at 29. The next highest ranking areas were “wait staff training,” “housekeeping training,” and “catering,” which all received a response of 26.

FIGURE 27: KNOWLEDGE AREAS IDENTIFIED AS BEING EXTREMELY OR RATHER IMPORTANT TO IMPROVE

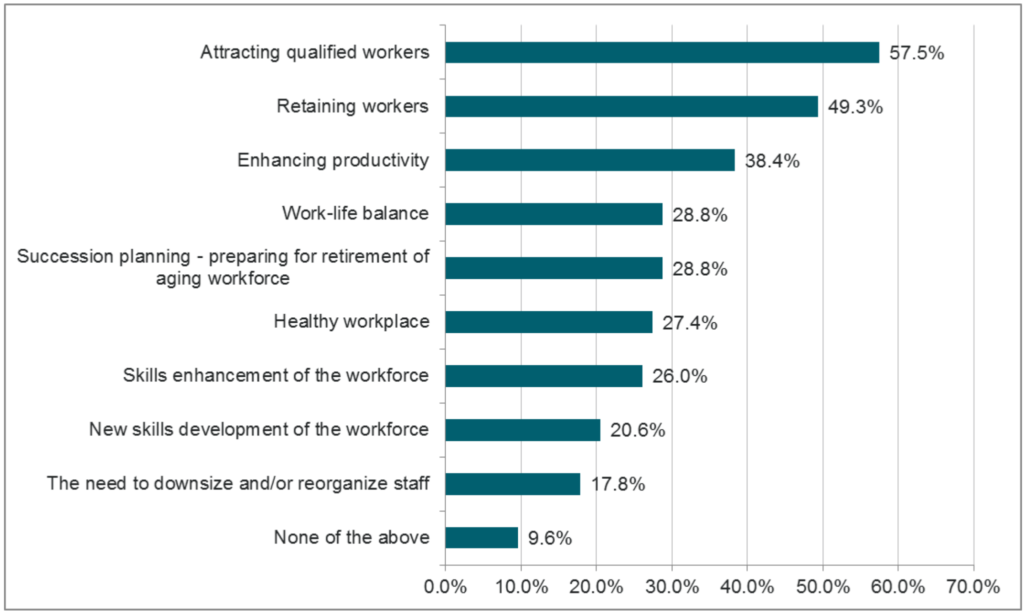
8.3.4 Human Resources Need

This section presents operators' responses to questions regarding their human resources issues and recruitment methods.

Human Resources Issues

Operators were asked to identify the key human resources issues they had to address over the past 12 months. For this question, respondents were able to select multiple answers, which led to a response rate greater than 100%.The most commonly cited issues were attracting qualified workers (57.5%), retaining workers (49.3%), and enhancing productivity (38.4%). The next two commonly cited issues were work-life balance (28.8%) and succession planning (28.8%).

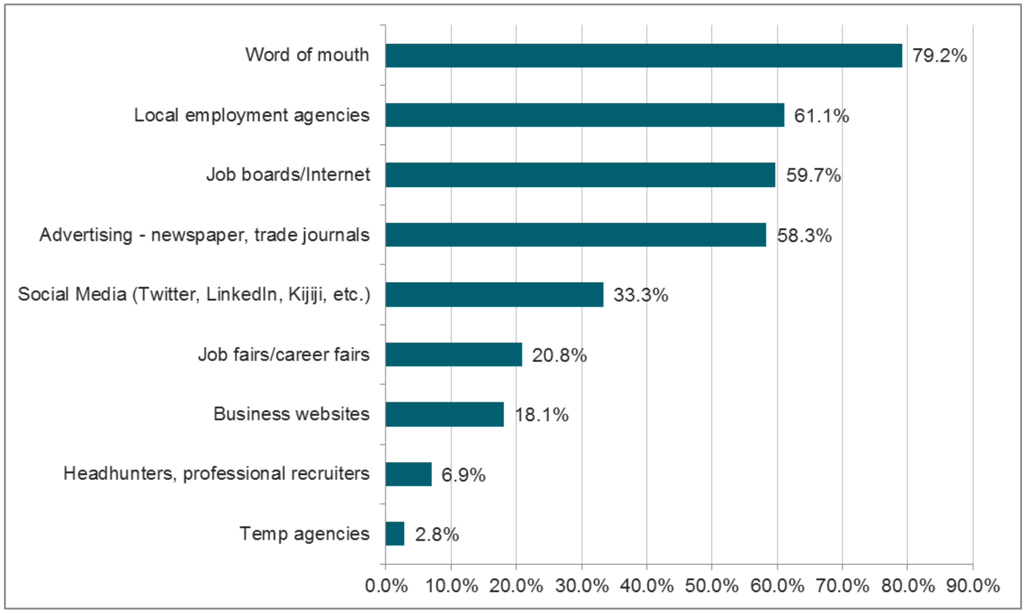
FIGURE 28: KEY HUMAN RESOURCES ISSUES THAT NEED TO BE ADDRESS



Recruitment Methods

Participants were asked to indicate all the different methods they used to recruit new employees. The most highly ranked recruitment methods were word of mouth (79.2%) and local employment agencies (61.1%). The next two highest ranked methods were job boards/internet (59.7%) and advertising (58.3%).

FIGURE 29: METHODS USED TO RECRUIT NEW EMPLOYEES

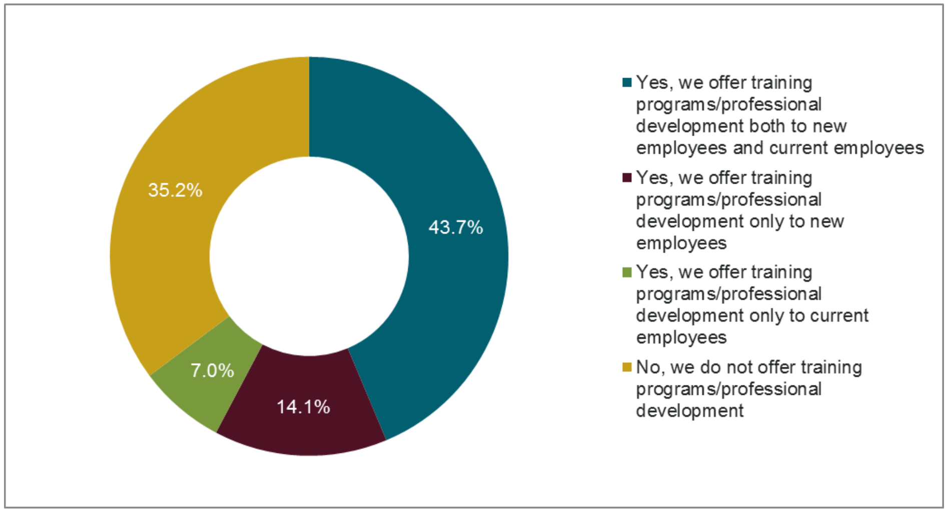


8.3.5 Implementing Training

This section presents responses to questions regarding the type of training offered to employees, training methods used, and course lengths.

Participants gave mixed results when asked if they offered training programs/professional development for their employees. The highest ranking responses were “yes to new and current employees” at 43.7% and “no to new and current employees” at 35.2%.

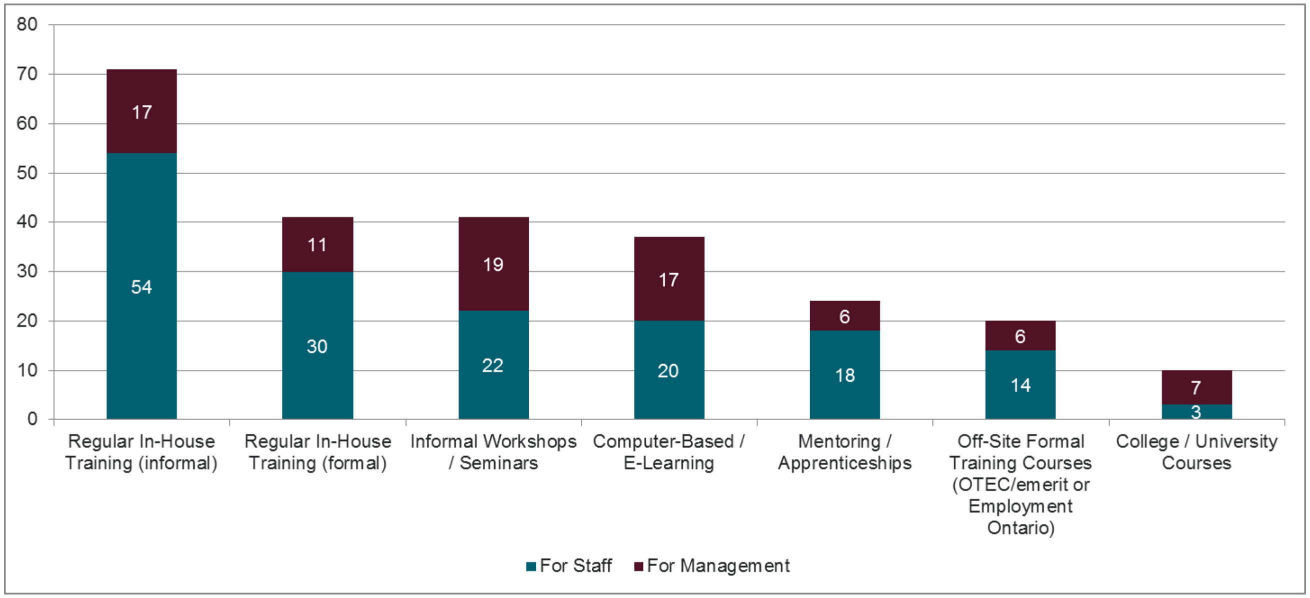
FIGURE 30: CURRENTAVAILABILITY OF TRAINING PROGRAMS FOR EMPLOYEEES



As a follow up question, operators who provided training were asked, “how much their training is in compliance?” Responses to this question suggest a high level of variation between training practices within those businesses reflected by this survey. In other words, there was no clear pattern with respondents indicating compliance training accounts for anywhere between 10% and 100% of training.

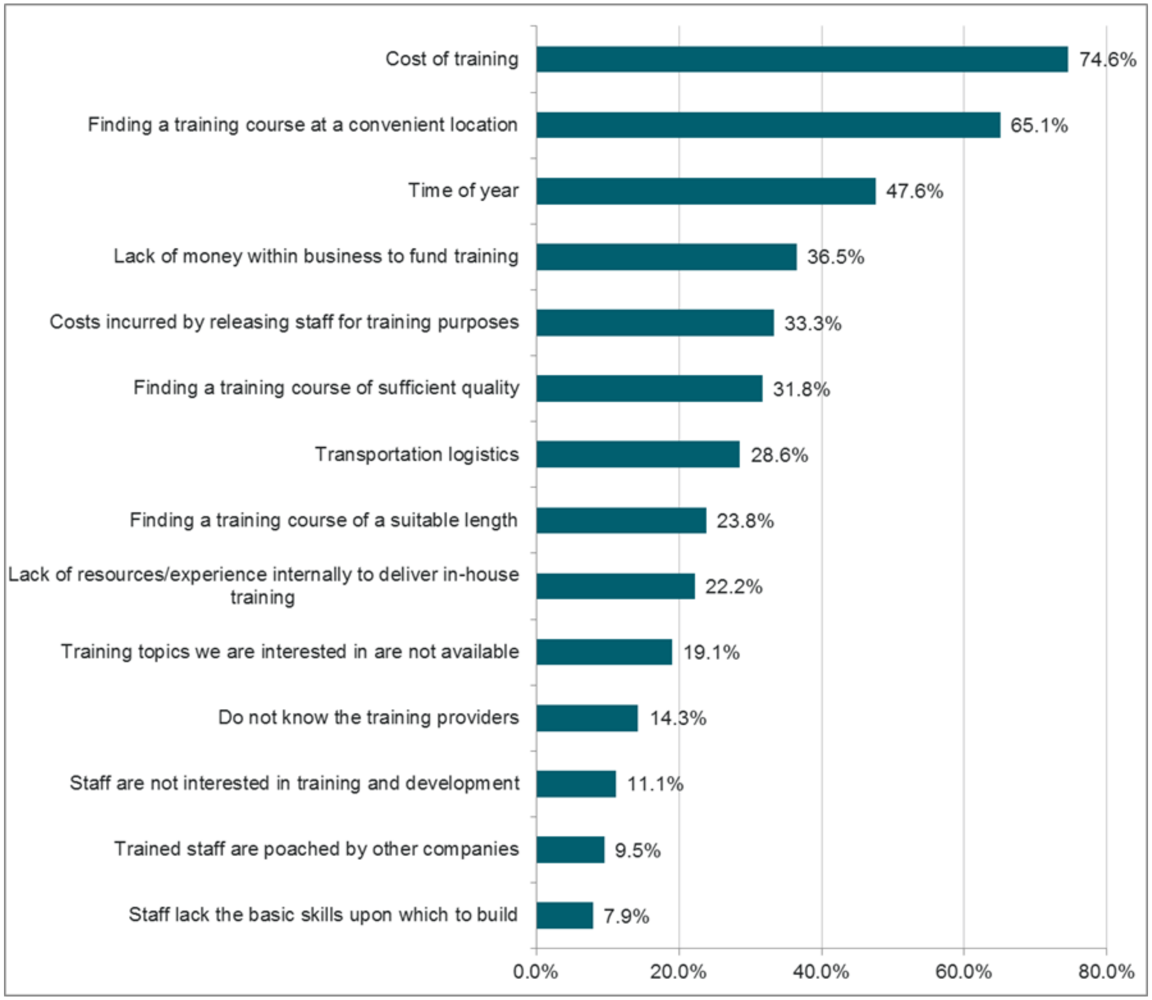
Businesses were asked to identify the training/professional developments methods they had used in the past two years. For this question, participants were able to select a multiple answers, which again led to a high number of total responses (244). Figure 31 shows the responses the different training methods received at the staff and management level. Looking at both staff and management, the most commonly cited methods were informal in-house training (71), formal in-house training (41), and informal workshops/seminars (41). Training through education institutions received the lowest response rates for both management and staff.

FIGURE 31: TRAINING/PROFESSIONAL DEVELOPMENT METHODS USED IN LAST TWO YEARS



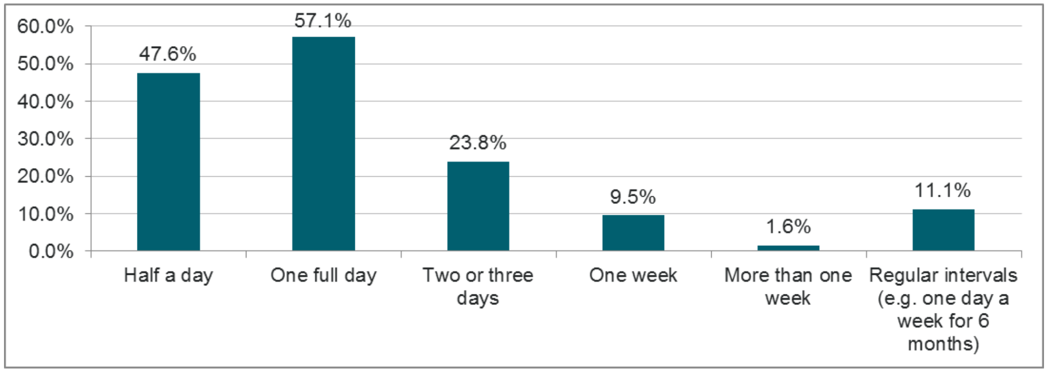
Operators identified various factors they considered to be important in relation to training and professional development. Once again, participants could select more than one factor which led to a response greater than 100%. The most commonly cited factors were cost of training (74.6%) and finding a training course at convenient locations (65.1%). The next three commonly cited factors were time of year (47.6%), lack of money within businesses to fund training (36.5%), and costs incurred by releasing staff for training purposes (33.3%). Of the top five factors, three of them involve costs related to training, which suggests that monetary concerns are a major issue for employers.

FIGURE 32: IMPORTANT FACTORS IN TRAIING/PROFESSIONAL DEVELOPMENT



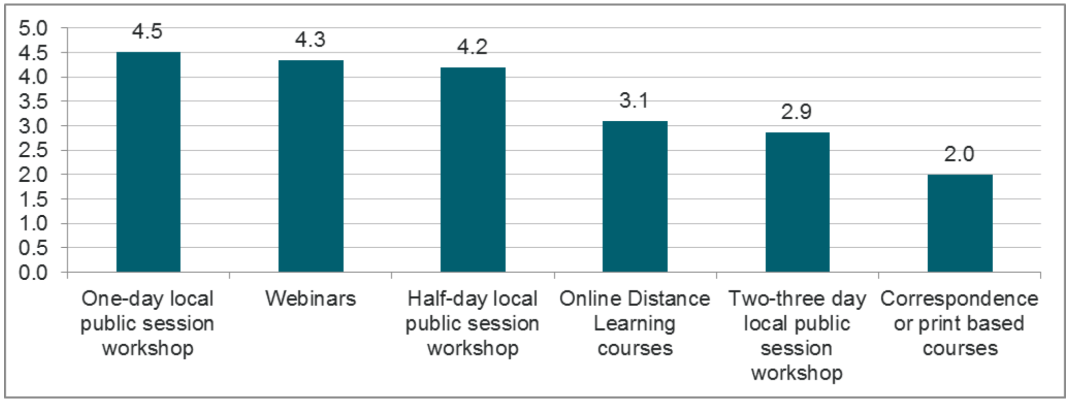
Operators were then asked to identify the appropriate course length for training and professional development. Participants could select more than one course length which led to a response greater than 100%. Businesses seem to prefer courses that are one day or less as the highest ranking categories were “one full day” (57.1%) and “half a day” (47.6%).

FIGURE 33: APPROPRIATE COURSE LENGTH FOR TRAINING & PROFESSIONAL DEVELOPMENT



Respondents were then asked to rank various educational methods in terms of the likelihood that they would be used. The highest ranking methods were “one day local public session workshop” (4.5), “webinars” (4.3), and half day local public session workshop (4.2). These methods all require a small time commitment, which reflects the preferred course length of operators, as outlined above.

FIGURE 34: LIKELIHOOD OF PARTICIPATION FOR LEARNING METHODS

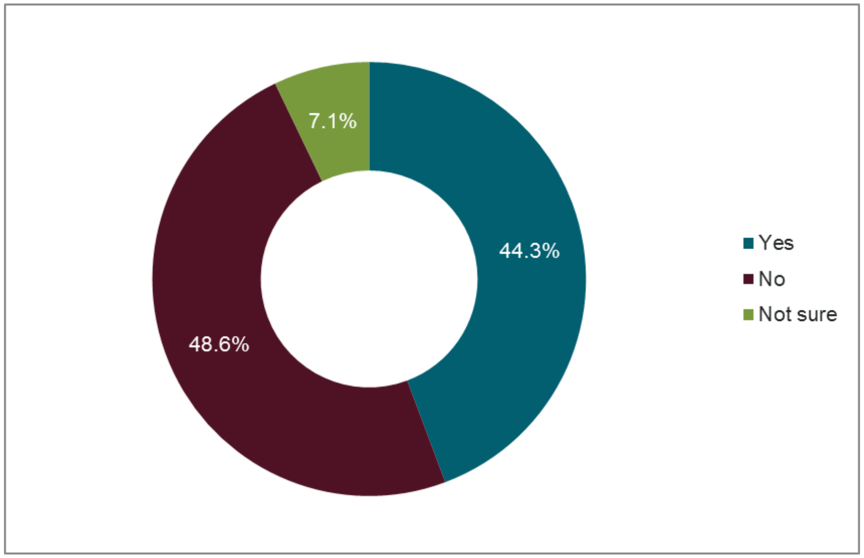


In terms of the training programs that have been provided to staff over the past 12 months, most businesses are training in health and safety, food and beverage, and housekeeping. A significant portion of operators also mentioned that they provided training in social media, customer service, and visitor experience.

As a follow-up question, businesses were asked to indicate which training providers they used. The most commonly cited provider was in-house training, followed by online/webinars and professional associations. Respondents also indicated the use of Red Cross/St. John's ambulance, which reflects the high frequency of safety training provided.

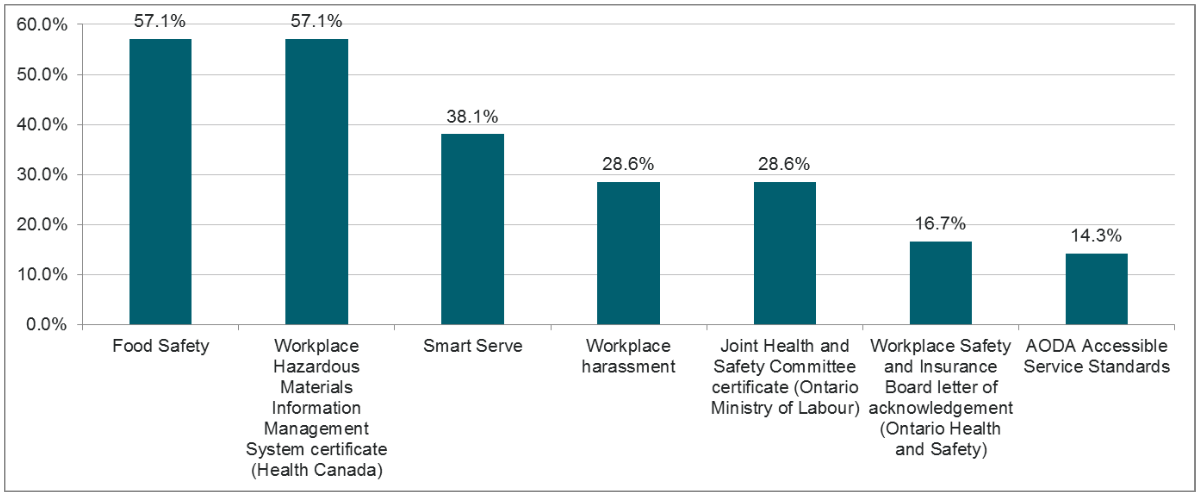
When asked if they provided a formalized orientation program for new employees, participants gave mixed results. Businesses that did not provide an orientation made up 48.6% of responses, while those that offered such orientation comprised 44.33% of the sample. These split results parallel the mixed responses operators offered when asked, "does your business provide training or professional development?"

FIGURE 35: ORIENTATION PROGRAM FOR NEW EMPLOYEES



Operators were asked to indicate the certifications that are mandatory for their staff. Participants could select more than one category, which led to a response greater than 100%. The highest ranking categories were food safety (57.1%), WHIMIS (57.1%), and Smart Serve (38.1%). These results generally reflect the prevalence of health and safety, and food and beverage training across the tourism sector.

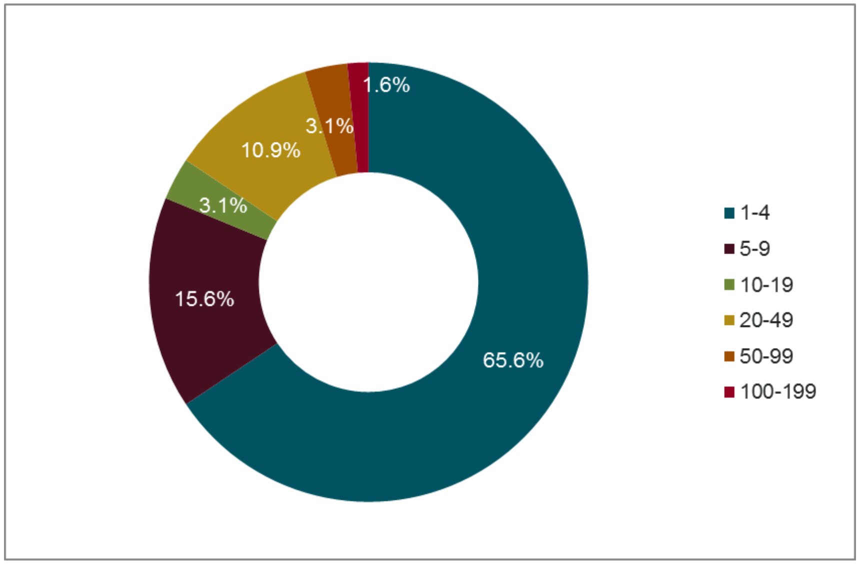
FIGURE 36: MANDATORY CERTIFICATIONS



8.3.6 Company Profile

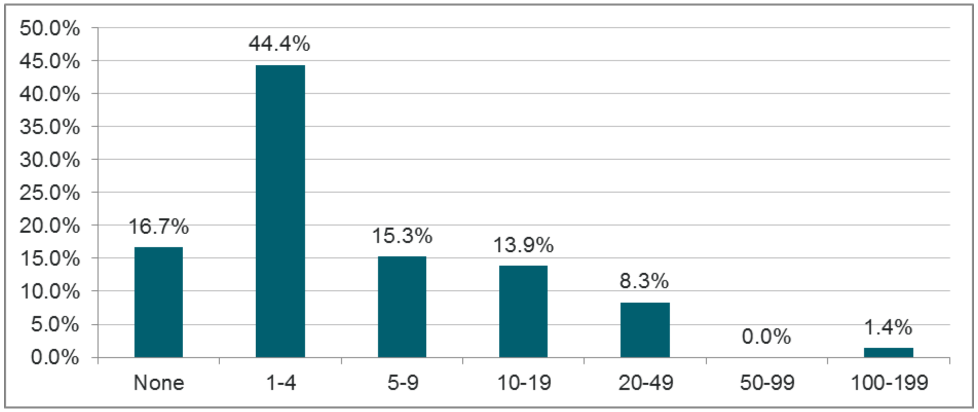
This section presents responses to questions asked in the "Company Profile" portion of the survey. When asked to indicate the number of permanent employees working for their establishment, the majority of survey tourism operators employed 1-4 workers (65.6%). The next highest responses were 5-9 workers (15.6%) and 20-49 workers (10.9%).

FIGURE 37: NUMBER OF PERMANENT EMPLOYEES AT ESTABLISHMENT



As a follow up question, participants were asked to indicate the number of temporary or contract workers they employed, and a significant portion of businesses employed 1-4 employees (44.4%). The next highest responses were "none" (16.7%), 5-9 workers (15.3%), and 10-19 workers (13.9%). The responses to the number of permanent and temporary workers who are employed support the notion that the majority of tourism operators in Northern Ontario are in fact small scale operations.

FIGURE 38: NUMBER OF TEMPORARY OR CONTRACT WORKERS AT ESTALISHMENT



The next question asked operators to identify how long their business has been in operation. The results suggest the majority of operators (65.3%) have been operating their businesses longer than 10 years, while 16.7% of businesses have been operating between 5-9 years. Start-up businesses or businesses that are 0-1 years old made up 2.8% of the responses.

FIGURE 39: YEARS IN OPERATION

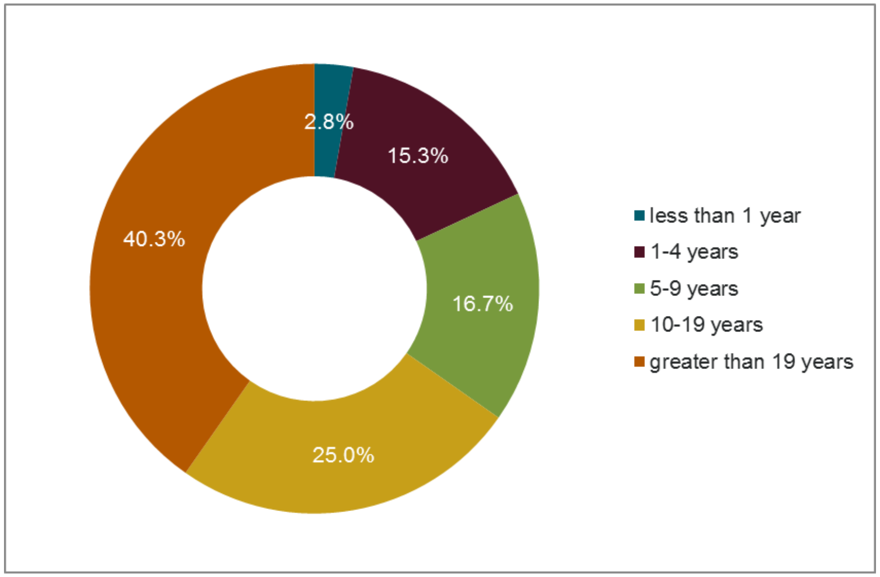
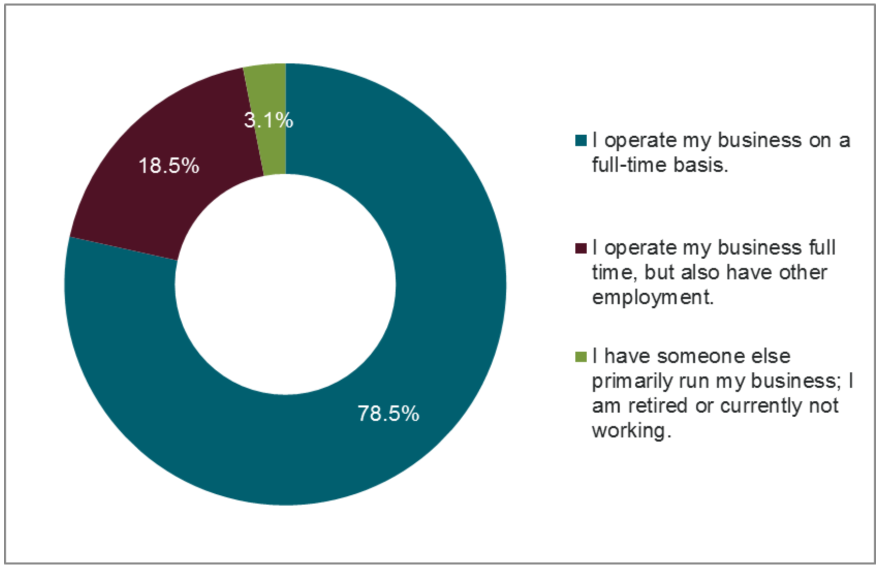


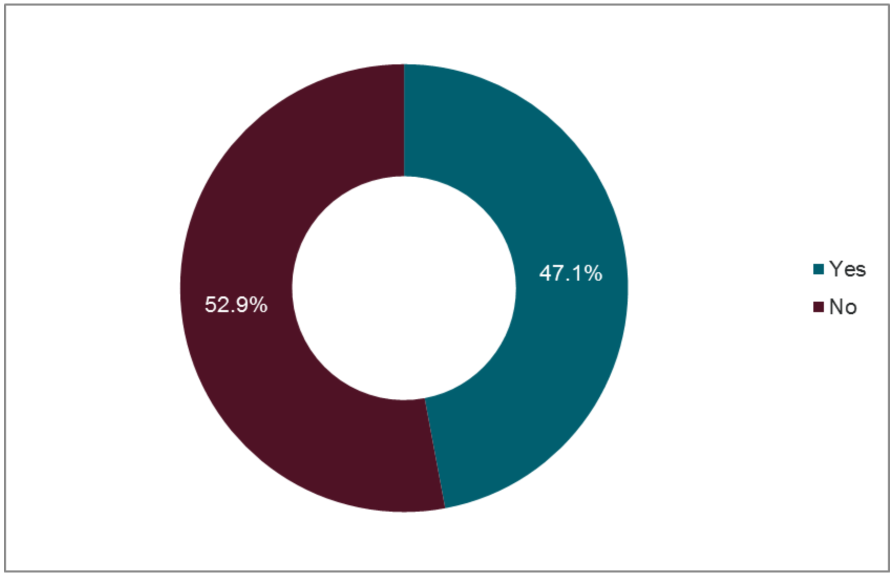
Figure 41 compares operators who are working full-time exclusively at their business to those who are retired or working other jobs. Out of the 65 businesses that responded, 51 or 78.5% reported operating their business on a full-time basis, while the second highest response was that they operate their business full-time, but also have other employment at 12 or 18.5%.

FIGURE 40: TYPE OF BUSINESS OPERATION



When asked to indicate if they operated their business year round, participants gave mixed results. Out of the 68 responses, 53.9% answered that they were open year round, while 47.1% indicated that they did not operate year round. This result is instructive as it provides an indication of the level of seasonality across the industry. These results suggest an approximate even split between seasonal operations and year round operations. In this context, the best timing for training opportunities is in the 'off season,' which more most seasonal operations is in the winter.

FIGURE 41: DO YOU OPERATE YOUR BUSINESS YEAR ROUND?



8.4 Summary of Key Findings

The following bulleted points serve to highlight the most central of the employer survey findings:

- Of those businesses surveyed, 56.5% indicate their labour force needs have changed within past 12-24 months.
- The majority of businesses plan to hire 1-4 people for the 24 listed occupations. Amongst occupations that would hire 1-4 employees, the highest ranking occupations by response were housekeepers (46), administrative staff (23), and wait staff (18). In general, seasonal employment received more responses when compared to full-time or part-time employment.
- The highest ranking occupations identified as being difficult to fill were front desk agents (88.9%), chefs (75.0%), administrative staff (73.3%), and recruitment staff (71.4%).
- When asked to identify factors that were important when recruiting staff, employers placed the most importance on “communication skills”, “personality & enthusiasm,” and “appearance/first impressions.” Employers identified “tourism/hospitality college or university education” and “certification/accreditation” as having the least importance.

- The majority of businesses (61.9%) did not offer internships. A significant portion of operators (54.6%) responded that their establishment never or rarely hired interns. However, some interns do find employment with their work placement as a quarter of operators hired interns “sometimes.”
- When asked to rank the importance of various skill areas that needed improvement amongst current and future staff, “customer service” skills was identified as the most important skill. The next highest ranking skills were “team working” skills, “problem solving” skills, and “health & safety”
- Of the businesses surveyed, employers had the most expert knowledge in the accommodation (39.5%) and visitor attractions (17.1%) subsectors
- Participants placed the most importance in business planning and accountancy/budgeting/financial management skills as knowledge areas they would like to upgrade. The next highest ranking areas were business management, customer service, and marketing.
- When asked to identify the key human resources issues they had to address within the past 12 months, the most commonly cited issues were attracting qualified workers (57.5%), retaining workers (49.3%), and enhancing productivity (38.4%).
- The most highly ranked recruitment methods were word of mouth (79.2%) and local employment agencies (61.1%). The next two highest ranked methods were job boards/internet (59.7%) and advertising (58.3%).
- When asked if they offered training programs/professional development for their employees, 43.7% of respondents answered “yes to new and current employees” while 35.2% responded “no to new and current employees.” As a follow up, operators were asked how of their training was in compliance. The majority of participants (66%) indicated compliance training made up 10% to 50% of their training.
- Of those surveyed, most commonly cited training/professional development methods for management and staff were informal in-house training (71), formal in-house training (41), and informal workshops/seminars (41).
- Operators identified various different factors they considered to be important in relation to training and professional development. Of the top five factors, three of them involve costs. The most commonly cited factors were cost of training (74.6%) and finding a training course at convenient locations (65.1%). The next three commonly cited factors were time of year (47.6%), lack of money within businesses to fund training (36.5%), and costs incurred by releasing staff for training purposes (33.3%).
- A large portion of operators preferred training/professional development courses that were a day long or less.
- In terms of the training programs that have been provided to staff over the past 12 months, most businesses training in health and safety, food and beverage, and housekeeping. Operators also indicated they most commonly used in-house training, online/webinars, and professional associations to deliver their training.

- Participants gave mixed results when asked if they provided a formalized orientation program for new employees. Businesses that did not provide orientation made up 48.6% of responses while those that did made up 44.33%.
- Operators indicated that a significant portion of mandatory certification was in work place safety and food and beverage. The highest ranking categories were food safety (57.1%), WHIMIS (57.1%), and Smart Serve (38.1%).
- The majority of tourism operators employed 1-4 permanent workers (65.6%), while 44.4% of businesses employ 1-4 temporary workers.
- When asked to indicate how long they have been operating their business, the majority operators (65.3%) have been operating their businesses longer than 10 years.
- In terms of the type of business they operate, 78.5% reported that they operate their business on a full-time basis with 53.9% of businesses operating year round.

9 Employee Survey Results

9.1 Introduction

An on-line survey was distributed to individuals working within the tourism sector across Tourism Northern Ontario's (RTO 13) coverage area with the intent of gathering quantifiable data on required skills, training challenges, business training, and professional development offerings in the sector. The survey was targeted to a broad audience to gather a wide range of quantifiable data. Unfortunately, the up-take of this survey tool was minimal with only 29 individuals participating. Statistically speaking, survey data of this type starts to become generalizable with 30 participants. Therefore, the following survey results should be interpreted with caution given the limited sample size. Consequently, the results are used to inform this strategy from the perspective of identifying consistent trends, but the consulting team views these results as strictly preliminary.

9.2 Project Organization, Data Analysis, and Methodology

This section summarizes the survey results from 29 individuals working within the tourism sector. Participants were asked to complete the survey between late January 2014 and early March 2014.

The survey was structured to identify issues in key areas such as:

- Skills and knowledge gaps
- Preferred Training Delivery
- Current Knowledge of the Industry
- Employment Profile

Within these key areas, there are 23 detailed questions. The survey tools used for analysis were Microsoft Excel and Survey Monkey.

9.3 Survey Findings

9.3.1 Respondent profile

- By and large, the respondents have been working in the sector for more than two years and have not completed a formal tourism program at the college or university level. Although most respondents indicated the completion of either a university degree or “graduate program, university certificate, diploma or degree.”
- These individuals have typically worked in either “Accommodation (including B&Bs, spas, guest houses, hotels, motels, lodge, resort, cottage)” and “Visitor Attractions (leisure parks, museums, galleries, monuments).”
- The respondents were well distributed in terms of age and gender.
- The majority of respondents were English speaking.

9.3.2 Skill and knowledge gaps

The first section of the survey was designed to elicit information concerning the importance of particular skills and knowledge areas to those working in the tourism sector.

When asked, “In which areas do you feel it is most important for you to upgrade your skills?” the top five areas identified by respondents included:

- Product Development Skills
- Sales, Marketing & Promotion Skills
- Language Skills
- Innovation & Creativity
- IT Skills

When asked, to identify those skills that are deemed extremely important to your position, participants consistently identified the following six areas:

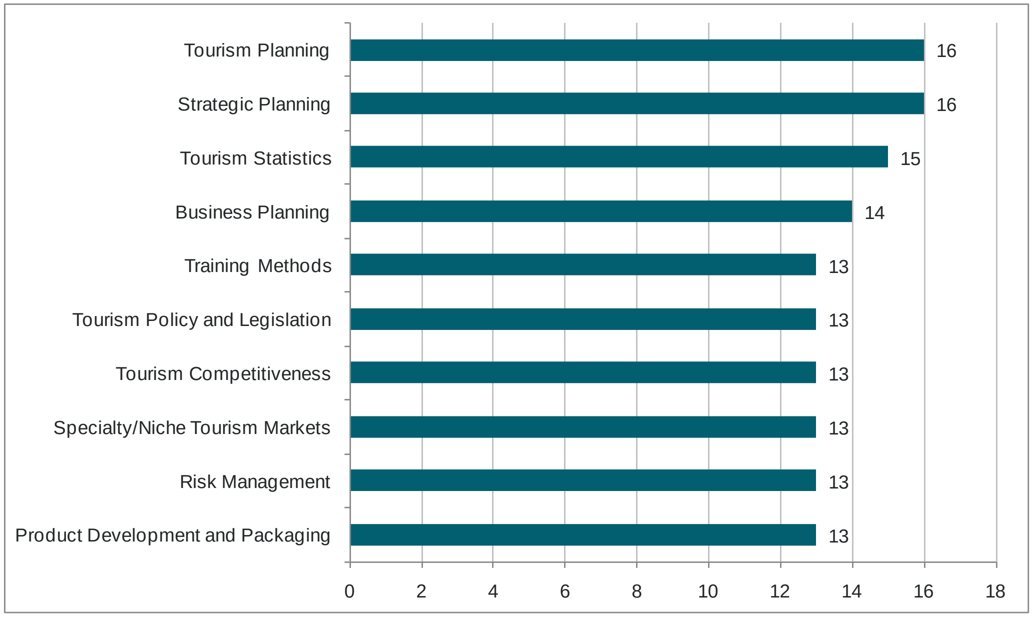
- Problem Solving Skills
- Language Skills
- Procurement
- Product Development Skills
- Writing Skills
- Health & Safety

When asked, to identify those skills that are “not important” to your position, participants highlighted the following seven areas:

- Business Management
- Environmental Awareness
- Showing Initiative
- Team Working Skills
- Accountancy/Budgeting/ Financial Management Skills
- Entrepreneurial Skills
- Web Design/Maintenance

Next, participants were asked to identify those knowledge areas that are deemed extremely important to their position. Of the 38 knowledge areas provided, Figure 42 shows the top 10 knowledge areas that were extremely and rather important. As shown in the figure, tourism planning (16), strategic planning (16), and tourism statistics (15), topped the list.

FIGURE 42: TOP 10 KNOWLEDGE AREAS THAT WERE EXTREMELY AND RATHER IMPORTANT



The next question asked participants to isolate the knowledge areas which are least valuable or considered not important to their position. The following knowledge areas received the most consistent votes as being “not important.”

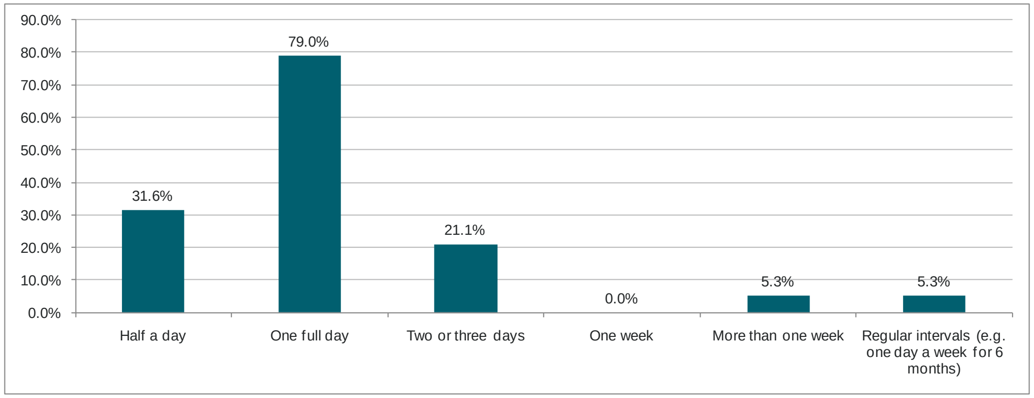
- Catering
- Food Hygiene
- Wait Staff Training
- Food Preparation Training
- Concierge/Bellhop Training
- Bartender Training

9.3.3 Preferred Training Delivery

This portion of the survey analysis relates to the participants preferred method and duration of training delivery.

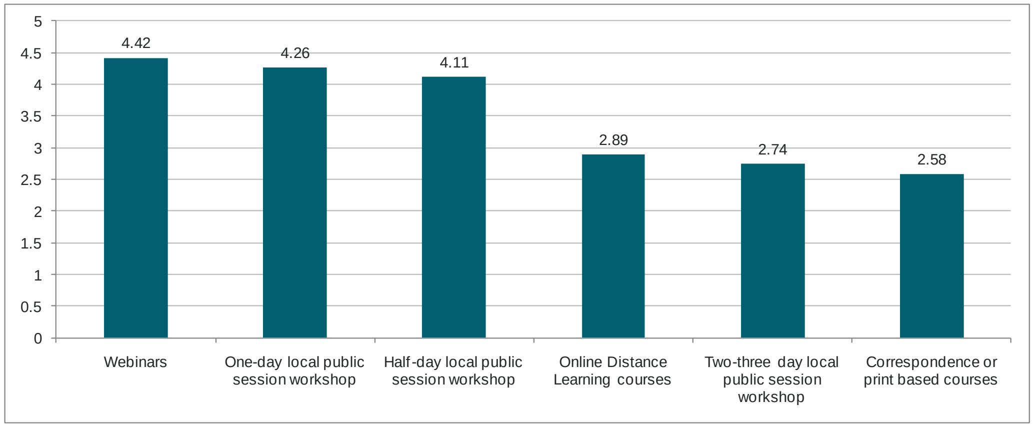
When asked, “Which course lengths are most appropriate for training and professional development opportunities?” the majority of respondents (79.0%) preferred courses that are one full day long. Half day sessions were also rated highly, with the second highest response (31.6%). The complete results are shown in the figure below.

FIGURE 43: MOST APPROPRIATE COURSE LENGTH FOR TRAINING AND PROFESSIONAL DEVELOPMENT OPPORTUNITIES



With respect to methods of learning, respondents were asked to rank as series of options according to their likelihood of participating. Of the options provided and shown in the figure below, the highest ranking learning methods were webinars, one day workshop, and half day workshop. These methods require the least time commitment. Notably, these results mirror the findings from the employer survey. In other words, employers ranked these same three methods of learning highest with respect to their likelihood to participate.

FIGURE 44: PREFERRED METHOD OF LEARNING

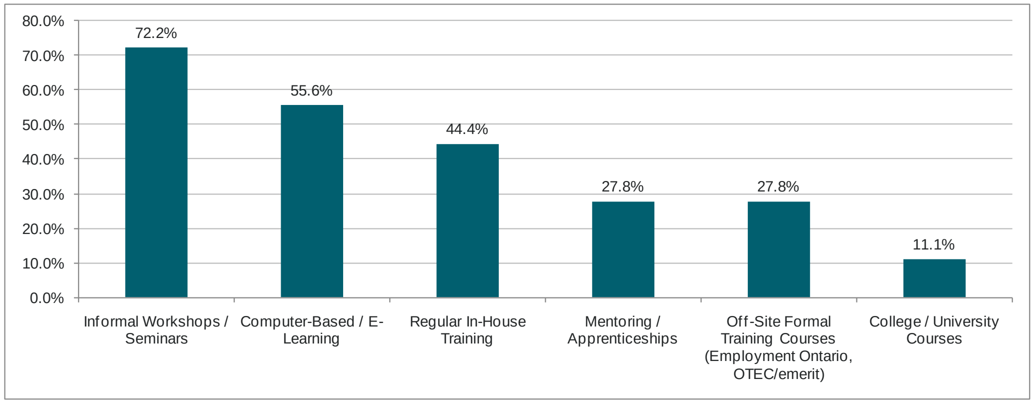


Next, participants were asked, “Have you participated in some form of professional development or formal training in the past 12 months?” The majority (68%) of respondents indicated participation in some form of professional development or formal training in the past 12 months. As a follow-up question, participants were asked to explicitly identify what this training centred on. The most common types of training included:

- Safety
- Social media
- Sales leadership
- Community Engagement
- Sports tourism
- Strategic planning

To understand the methods of training delivery typically utilized by the tourism sector, participants were then asked, “Which, if any, of the following methods of training and professional development have you used in the last two years?” Figure 45 shows the results of this question, with the most utilized types of training including: informal workshops (72.2%), computer based (55.6%), and regular in-house training (44.4%).

FIGURE 45: METHODS OF TRAINING USED IN THE LAST TWO YEARS



As a follow-up question, participants were also asked if their employers financially supported participation in professional development. The majority of respondents (73%) indicated their respective employers financially support participation in professional development. Moreover, respondents reported their employers support "professional development in house" through formal training and informal training (job shadowing). Notably, the most common form of professional development supported by employers is external to the organization and delivered through a third party.

9.4 Summary of Key Findings

- The top five areas in which respondents would like to increase their skills include:
    - Product Development Skills
    - Sales, Marketing & Promotion Skills
    - Language Skills
    - Innovation & Creativity
    - IT Skills
- The top six skills deemed important to employees' positions include:
    - Problem Solving Skills
    - Language Skills

- Procurement
- Product Development Skills
- Writing Skills
- Health & Safety

- Particular Soft skills such as communication and customer service were not identified by employees as critical to their jobs, yet employers consistently cited these skills as fundamental.
- The most common form of professional development supported by employers is external to the organization and delivered through a third party.
- The most utilized types of training including: informal workshops (72.2%), computer based (55.6%), and regular in house training (44.4%).
- The highest ranking learning methods were webinars, one day workshops, and half day workshops. These methods require the least time commitment. Notably, these results mirror the findings from the employer survey. In other words, employers ranked these same three methods of learning highest with respect to their likelihood to participate.
- The majority of respondents (79.0%) preferred courses that are one full day long.

10 Focus Group Results

10.1 Introduction

On March 4, 2014, three focus groups were facilitated by the consulting team with key stakeholders of the Northern Ontario Tourism Sector. The objective of these focus groups was to understand the best way to enhance skills training, programs, supports, and access for operators and employees in Northern Ontario's Tourism Sector.

The focus groups utilized Adobe Connect, a virtual meeting software, to facilitate remote participation. Participants were asked to attend the focus group that most closely aligned with their geographic affiliation. The three catchment areas centred on Sault Ste. Marie, Sudbury, and Thunder Bay. In total, 20 individuals participated in these sessions. The following section summarized the results of these focus groups. The results are presented according to the seven questions posed by the consulting team. Moreover, these results should be read as the direct perspective of the participants. Finally, for brevity, any redundant comments have been omitted.

10.2 Sault Ste. Marie

What are the top three most important skill gaps experienced by tourism operators in your area?

- Customer Service Skills
- Event planning and market research
- Cross-sector promotional training
- Business Planning
- Succession Planning
- Marketing and sales
- Product development
- Soft-skills training and basic communication skills
- Basic employability skills – businesses etiquette
- Website/social media skills
- Marketing and ROI tracking tools to validate outputs on what is being done
- Seasonal staff recruitment and retention

What is working well in terms of tourism training delivery in Northern Ontario? (And in your specific to your geographic area)

- Training classes offered via webinars on social media or photography
- Natural Resources Training to Employment ,Thunder Bay
- Navigating Pathways project,
- Workplace standards in tourism based on knowledge of the job, skills required and tourism awareness
- Pre-employment training for tourism
- Social media offerings from TNO and Algoma training of visitor centre staff was successful
- Fish and Wildlife programs have successfully delivered the staff training required by my businesses
- The 2012 *Métis Nation of* Ontario (*MNO*) Navigating Employment Pathways program geared toward tourism and hospitality is been very successful
- *Emerit* training courses are effective

What's not working in terms of tourism training delivery in Northern Ontario?

- Colleges and universities have difficulty tailoring specific programming to support individual employers. To this end, it seems like there is a lack of outreach by post-secondary institutions to ensure their programming is meeting the needs of industry.
- There is a lack of clarity around which types of programs are directly relevant and useful for particular operators and their staff
- There is a lack of understanding/awareness of what is available in the area with respect to training; there is a lack of awareness about where operators can or should go to find information about online courses or workshops.
- There is a disconnect between the supply side of labour and the expectations and requirements of industry, especially in rural and outlying areas.
- There is a lack of understanding of the cyclical nature of employment in the tourism sector. Training must be offered in line with the demands of industry. The off-season is the most logical time to offer training, but finding the time has proven difficult for smaller operators.
- There is a lack of understanding of the diverse training requirements of urban versus rural based populations and industry.

Are there specific training methods of which you aware that are currently missing in Northern Ontario? (and in your area specifically?)

- Video conferencing training options are lacking across Northern Ontario to reach a wider audience for a workshop or course.
- Offering specific courses on customer service and tour guiding with the overall co-ordination of programs would be helpful.
- Understanding adult learning principles in delivery, occupational standards based training and coaching models is fundamental to this process.
- Flexibility in course delivery should be encouraged: combined, book, online, etc.
- For those operators looking at diversifying their businesses, we could offer soft adventures in a traditional lodge setting. With that said, we need to teach the operators how to expand or transition their business model.
- Training programs for guides exist, but the true professional experienced fishing/hunting guide is in short supply. Industry needs this type of personnel and is willing to pay for it.

How might the current training gaps be addressed?

- I strongly feel we need to bring training directly to operators and those who work in the industry, to their level, and make sure these opportunities are relevant to their needs…not college programs as there is a separate process underway for that?
- Industry specific training should be heavily subsidized to increase up-take and reduce the burden on operators with limited resources.
- Scheduled training, set out in advance and communicated well; multiple time/date offerings
- We need to develop an inventory of different training courses in the region. There is a need for coordinating body to ensure that the courses provided are geared to the industry. When holding online courses there should be different time slots. Moreover, a separate calendar could be created for strictly on-line/webinar type offerings
- Improve linkages between the demand side and the supply side. Let's be innovative in our approach to training delivery in rural and remote areas.
- In the off-season, operators themselves should be recruited to support training. This would provide revenue for the operators and create alignment between the demands of industry and available programming.
- Training times have to accommodate the actual seasons of operations. This is especially important for small business.

- A sub-regional training summit might be effective at mobilizing existing resources and formalizing the necessary partnerships to roll out this training.

What organization(s) are best positioned to deliver this training?

- Sault Community Career Centre is agreeable to coordinating training opportunities. The centre also has the space and training rooms also equipped for video and web.
- Whatever the path forward looks like, it needs to be a coordinated approach. Many organizations have a role to play. The TNO has an over-arching coordinating role while the DMOs are well connected to operators. The training organizations themselves should be building capacity to offer core training in more remote areas.
- One that understands the industry needs.
- One that is based on occupational standards and a variety of delivery models.
- One that will not create a silo for the needs of its organization.
- One that understands the workforce issues as it relates to Northern Ontario
- There is no need to reinvent the wheel. We can utilize modules that are already developed, and in an effort to ensure maximum impact, train organizations such as DMO's to deliver the training more broadly.
- Colleges in the area are well positioned. Organizations providing assistance to those wanting to get back into the work force such as the Job Connect with Sault College. Satellite campuses in small communities.

10.3 Sudbury

What are the top three most important skill gaps experienced by tourism operators in your area?

- Customer Service Skills
- Soft-skills training and basic communication skills
- Basic employability skills – businesses etiquette
- Work ethic
- Front of house training for general tourism information on the area- regional awareness training to be ambassadors of the sector
- Equipment operator training
- Cash handling
- Workplace safety

- Business administration
- Food preparation
- Menu planning skills
- Website/social media skills
- Marketing and ROI tracking tools to validate outputs on what is being done
- Event planning and market research
- Cross-sector promotional training

What is working well in terms of tourism training delivery in Northern Ontario? (And in your specific to your geographic area)

- Industry input into development of localized training programs. The best training is that which is directly informed by industry.
- Social media training conducted by the TNO. Still need to follow up and refine.
- Service excellence courses are great, but very costly for individual businesses.
- The Northern Ontario Regional Tourism Association provided training to all information booth centres prior to the summer. Very well done.
- Canadian Tourism Human Resource Council (CTHRC) has offered a wide array of successful online courses
- The 2012 *Métis Nation of* Ontario (*MNO*) Navigating Employment Pathways program geared toward tourism and hospitality is been very successful

What's not working in terms of tourism training delivery in Northern Ontario?

- There is a lack of understanding/awareness of what is available in the area with respect to training.
- There is a lack of communication of what is available! And there is simply not enough training available across the North.
- A coordinated approach to tourism training delivery for operators is still missing. We need to address this short-coming.
- There is a disconnect between the supply side of labour and the expectations and requirements of industry, especially in rural and outlying areas.
- There is a lack of understand of the cyclical nature of employment in the tourism sector. Training must be offered in line with the demands of industry. The off-season is the most logical time to offer training.

- There is a ton of red tape and *bureaucracy* surrounding training in Northern Ontario. Traditionally, this has been an impediment to training delivery.
- There is a definite need to provide more consistent training support across the industry.
- There is a lack of understanding of the diverse training requirements of urban versus rural based populations and industry.

Are there specific training methods of which you aware that are currently missing in Northern Ontario? (and in your area specifically?)

- It is more about knowing what is available and how applicable the content is to our parks at a local level than actually augmenting the current training options.
- To-date training has been generally lacking so identifying just one method is difficult.
- Operators are not familiar with webinars, so difficult to have them sign up for them.
- More use of online training may be more appealing if marketed well, but this still has limitations given the remoteness of some of our operators which lessens their access to internet.

How might the current training gaps be addressed?

- Industry communicating with trainers and funders to develop "standard" training to understand what training is needed/preferred by industry.
- A robust value proposition should be attached to training. The answer must be provided to the question, “what is valuable about this training for me (the operator) and my employees?” This might be achieved by collecting and communicating real stories from businesses reflecting the positive outcomes of particular training initiatives.
- Business coaching
- Look to emulate The 2012 *Métis Nation of* Ontario (*MNO*) Navigating Employment Pathways program geared toward tourism and hospitality.
- Communication and awareness needs to be improved. Effective means of communicating what training options are available; and when, where, and how training is conducted should be examined. The time, cost, and availability of the industry to participate are critical. This lends itself to the creation of an easily navigated training inventory.
- Develop general training programs for customer service and making those available at cost effective rates.
- Operators utilizing Aboriginal Skills Employment Training Strategy Holders for use of funding for training, wage subsidies and labour pool.
- Contract trainers to deliver training onsite (i.e. first aid, customer service).

- Scheduled training, set out in advance and communicated well; multiple time/date offerings
- We need to develop an inventory of different training courses in the region. There is a need for coordinating body to ensure that the courses provided are geared to the industry. When holding online courses there should be different time slots.

What organization(s) are best positioned to deliver this training?

- Industry professionals (like St. Johns First Aid), colleges and high schools
- It all depends on the training being offered. Although Ontario Tourism Education Corporation, OTEC, Community Colleges, industry experts are all well positioned.
- Not sure entirely, but whatever provider would need a strong tourism and business focus. It should also be capable of providing training using several different methods. Ideally, this training would leverage a variety of different delivery methods.
- FAR North East Training Board, colleges or universities. Generally speaking, any organization with the networks across the North.
- Northern Ontario Tourism Agencies and training institutes. It makes sense for the job providers to be directly involved with the training delivery
- Organizations with training dollars can issue RFPs with specific regional requirements to identify the best trainers.

10.4 Thunder Bay

What are the top three most important skill gaps experienced by tourism operators in your area?

- Customer Service Skills
- Soft-skills training, positive attitude, basic communication skills
- Life skills or basic employability skills – businesses etiquette
- Front of house training for general tourism information on the area- regional awareness training to be ambassadors of the sector
- Coaching/ leadership / mentorship skills
- Digital marketing/Website/social media skills
- Business planning
- Event planning and market research

- Cross-sector promotional training

What is working well in terms of tourism training delivery in Northern Ontario? (And in your specific to your geographic area)

- Wherever there are strong partnerships and collaboration between organizations, training has been relatively effective. The ‘siloed’ approach is far less effective.
- Training delivery in Thunder Bay at the college level is good. Access to this training is the challenge.
- The training OTEC conducted with front line staff was well received, but the uptake of these sorts of programs is difficult unless employees are paid for their time.
- On-site (in community) delivery of programs/workshops
- Webinars work well if it is with small groups and people have some familiarity with subject. Face to face is always better, but with a larger the group the training becomes less personalized.
- TNO has received very high rankings for its social media workshops - both in person and online.
- Industry input into development of localized training programs. The best training is that which is directly informed by industry.
- The business community within the Treaty #3 region is responding by hiring graduates of programs, supporting placements and offering representation on advisory committees
- Adventure tourism, outdoor education, customer service (NWO) has been rather effective
- MNO hospitality programs and HOST group (hotel association), partnerships with Chambers of Commerce and other industry leaders have all been collaborating.
- Service excellence customer service delivery is being delivered by a range of stakeholders in Thunder Bay. ie. Confederation, the MNO, YES Employment, etc.
- The train the trainer models for serving more remote communities has also been effective

What’s not working in terms of tourism training delivery in Northern Ontario?

- There is a lack of understanding/awareness of what is available in the area with respect to training
- The general attitude of younger people these days is really bad.
- A coordinated approach to tourism training delivery for operators is still missing. We need to address this short-coming.

- Local business does not seem to have much awareness of AODA legislative requirements. Also, great training available through college and local training partners, but many businesses lack tools and resources to continue training in the workplace.
- There are consistent challenges with delivering programming to remote communities. Infrastructural barriers at the university level prohibit an in the field approach.

Are there specific training methods of which you aware that are currently missing in Northern Ontario? (and in your area specifically?)

- We need to allow for “as needed” training options to support industry.
- LaCloche Manitoulin Business Assistance Corporation (LAMBAC) was working on a Tourism Product Development Project - modeled after Atlantic Canada Experience. We could look to emulate this approach.
- criteria based assessment and standards
- Toolkits for owners and managers and online training programs for businesses
- Training and leadership programs for youth
- A simplified "how to write your business plan" workshop.
- Marketing and social media proficiency as well

How might the current training gaps be addressed?

- Leveraging sector linkages and understanding the importance of dynamic partnerships. These partnerships allow for the delivery of programming to more remote areas.
- Provide module based training that is broadly recognized by industry
- Industry communicating with trainers and funders to develop "standard" training to understand what training is needed/preferred by industry
- A robust value proposition should be attached to training. The answer must be provided to the question, “what is valuable about this training for me (the operator) and my employees?” This might be achieved by collecting and communicating real stories from businesses reflecting the positive outcomes of particular training initiatives.
- We need to address up-skilling the existing the workforce by creating more flexible pathways for those currently employed (internal organizational challenge)
- We should encourage people to view tourism as a career rather than a stop gap job. Therefore, we should seek out ways to encourage entrepreneurship, and the recognized transferability of skills to support career mobility and career laddering.

What organization(s) are best positioned to deliver this training?

- Northern Ontario is too vast for just one coordinating agency to accommodate.
- TNO may be well positioned to coordinate programming and facilitate training partnerships, but the actually training delivery should be the responsibility of organizations like the Ontario Tourism Education Corporation (OTEC), local colleges and local employment service providers.

10.5 Summary of Key findings

Identified skill gaps

- Customer Service Skills
- Business Planning
- Succession Planning
- Soft-skills training and basic communication skills
- Digital marketing/Website/social media skills

Training strengths across Northern Ontario

- TNO's social media workshops - both in person and online.
- Algoma training of visitor centre staff was successful
- Industry input into development of localized training programs as the best training is that which is directly informed by industry
- The train the trainer models for serving more remote communities has also been effective
- The 2012 *Métis Nation of* Ontario (*MNO*) Navigating Employment Pathways program geared toward tourism and hospitality has been very successful

Identified training challenges and caveats to program development and delivery

- There is a lack of understanding/awareness of what is available in the area with respect to training; there is a lack of awareness about where operators can or should go to find information about online courses or workshops.
- There is a lack of communication of what is available! And there is simply not enough training available across the North.

- There is a lack of understanding of the cyclical nature of employment in the tourism sector. Training must be offered in line with the demands of industry. The off-season is the most logical time to offer training, but finding the time has proven difficult for smaller operators.
- A coordinated approach to tourism training delivery for operators is still missing. We need to address this short-coming.
- Colleges and universities have difficulty tailoring specific programming to support individual employers. To this end, it seems like there is a lack of outreach by post-secondary institutions to ensure their programming is meeting the needs of industry.

Gaps in current training delivery

- To-date training has been generally lacking so identifying just one method is difficult.
- Video conferencing training options are lacking across Northern Ontario to reach a wider audience for a workshop or course.
- More use of online training may be more appealing if marketed well, but this still has limitations given the remoteness of some of our operators which lessens their access to internet.
- Offering specific courses on customer service, tour guiding with the overall co-ordination of programs would be helpful.
- Understanding adult learning principles in delivery, occupational standards based training and coaching models is fundamental to this process.
- Flexibility in course delivery should be encouraged: combined, book, online etc.
- A simplified "how to write your business plan" workshop.
- Toolkits for owners and managers and online training programs for businesses.

Opportunities to improve tourism training

- A robust value proposition should be attached to training. The answer must be provided to the question, “what is valuable about this training for me (the operator) and my employees?” This might be achieved by collecting and communicating real stories from businesses reflecting the positive outcomes of particular training initiatives.
- Leveraging sector linkages and understanding the importance of dynamic partnerships. These partnerships allow for the delivery of programming to more remote areas.

- Communication and awareness needs to be improved. Effective means of communicating what training options are available; and when, where, and how training is conducted should be examined. The time, cost, and availability of the industry to participate are critical. This lends itself to the creation of an easily navigated training inventory.
- We need to develop and inventory of different training courses in the region. There is a need for a coordinating body to ensure that the courses provided are geared to the industry. When holding online courses there should be different time slots. Moreover, a separate calendar could be created for strictly on-line/webinar type offerings
- Operators utilizing Aboriginal Skills Employment Training Strategy Holders for use of funding for training, wage subsidies and labour pool.
- In the off-season, operators themselves should be recruited to support training. This would provide revenue for the operators and create alignment between the demands of industry and available programming.
- Training times have to accommodate the actual seasons of operations. This is especially important for small business.
- A sub-regional training summit might be effective at mobilizing existing resources and formalizing the necessary partnerships to roll out this training.

Training coordination and delivery considerations

- Any organizations that meet the following criteria should be involved to operationalize this study’s strategy:
    - One that understands the industry needs.
    - One that is based on occupational standards and a variety of delivery models.
    - One that will not create a silo for the needs of its organization.
    - One that understands the workforce issues as it relates to Northern Ontario
- TNO may be well positioned to coordinate programming and facilitate training partnerships, but the actually training delivery should be the responsibility of organizations like the Ontario Tourism Education Corporation (OTEC), local colleges and local employment service providers.
- There is no need to reinvent the wheel. We can utilize modules that are already developed, and in an effort to ensure maximum impact, train organizations such as DMO's to deliver the training more broadly.
- Organizations with training dollars can issue RFPs with specific regional requirements to identify the best trainers.

Appendix C: Situational Analysis

10.6 Labour Mobility

In this section, Labour Mobility is examined by place of residence vs. place of work across Northern Ontario’s largest commuter sheds. With respect to tourism based employees, as defined by the 108 occupations identified in Appendix C, the largest of these commuter sheds include the areas surrounding Greater Sudbury, Thunder Bay, and Sault Ste. Marie.

This information is useful to understand the typical commuting range of those working in these cities, which can then be used to estimate the maximum range an employee may consistently travel for training opportunities.

The following three figures provide insight into the commuting patterns of those workers who commute to or from Greater Sudbury, Sault Ste. Marie and Thunder Bay on a regular basis. These figures show commuter trends for flows of 50 or more workers with a usual place of work. Each figure highlights the total number of workers that flow in and out of these communities along with the weighted average one-way commuting distance for each worker. It should be noted that those commuters who work in the same community as they live have been excluded from this analysis.

FIGURE 46 SELECTED COMMUNTING FLOWS FOR THE GREATER SUDBURY COMMUTER SHED, 2011

Commuting from Sudbury to...	Number of Commuters	Approximate Commuting Distance (km)	Commuting to Sudbury from...	Number of Commuters	Approximate Commuting Distance (km)
South Frontenac	530	648	Markstay-Warren	575	50
Kingston	345	631	West Nipissing	395	90
Espanola	190	71	Espanola, T	260	71
Toronto	155	388	North Bay, CY	145	129
North Bay	130	129	Sault Ste. Marie	90	309
West Nipissing	105	90	Baldwin	65	68
Timmins, CY	90	293	Toronto	55	388
French River	80	74	Whitefish Lake 6	50	12
Ottawa	70	485			
Markstay-Warren	55	50			
Total	**1,750**			**1,635**	
Weighted Average Commuting Distance		**417 km**			**95 km**

Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.

FIGURE 47 SELECTED COMMUNTING FLOWS FOR THE SAULT STE. MARIE COMMUTER SHED, 2011

Commuting from Sault Ste. Marie to…	Number of Commuters	Approximate Commuting Distance (km)	Commuting to Sault Ste. Marie from…	Number of Commuters	Approximate Commuting Distance (km)
Wawa	100	228	Plummer Additional	105	70
Greater Sudbury	90	307	Elliot Lake	80	201
Blind River	80	144	Garden River 14	80	18
Toronto	65	688	Johnson	70	350
			Huron Shores	60	108
			Wawa	55	228
			Bruce Mines	45	70
			Blind River	40	144
			Thessalon	35	90
Total	**335**			**570**	
Weighted Average Commuting Distance		**318 km**			**141 km**

Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.

FIGURE 48 SELECTED COMMUNTING FLOWS FOR THE THUNDER BAY COMMUTER SHED, 2011

Commuting from Thunder Bay to…	Number of Commuters	Approximate Commuting Distance (km)	Commuting to Thunder Bay from…	Number of Commuters	Approximate Commuting Distance (km)
Fort William	475	14	Oliver Paipoonge	1,785	30
Oliver Paipoonge	385	30	Thunder Bay, Unorganized,	1,210	40
Thunder Bay, Unorganized	285	40	Shuniah	1,015	12
Shuniah	65	12	Neebing	735	41
Red Lake	50	568	O'Connor	275	39
			Conmee	245	39
			Gillies	115	43
			Fort William 52	105	14
			Toronto	85	1,389
			Greenstone	55	264
			Brampton	50	1,376
Total	**1,260**			**5,675**	
Weighted Average Commuting Distance		**46 km**			**65 km**

Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.

The figures above indicate distinct characteristics for those workers in the Greater Sudbury, Thunder Bay, and Sault Ste. Marie commuter sheds. Residents of Greater Sudbury for instance are willing to travel relatively great distances for work, with a weighted average one-way commuting distance for each worker over 400km.[18] More instructive are those commuters who enter Sudbury each day for work. Figure 46 shows the weighted average one-way commuting distance these commuters to be 95 km. Similarly, in the Sault Ste. Marie commuter shed (see Figure 47), workers based in Sault Ste. Marie seem to be more willing to travel great distances for work than those workers who commute into Sault Ste. Marie for work. The weighted average one-way commuting distance for workers who commute into Sault Ste. Marie is 141 km. Finally, those traveling in and out of Thunder Bay for work have a much smaller commuter range than found in Greater Sudbury or Sault Ste. Marie's commuter sheds. Figure 48 shows the weighted average one-way commuting distance for workers who commute into Thunder Bay to be 65km, which is nearly 20 km more than those regularly leaving the city for work.

Taken together, the distance of 50-75km is likely reflective of the distances individuals would be regularly willing to travel for on-site training activities across Northern Ontario. With that said, each of the three commuter sheds examined above has considerable variation. Thunder Bay's residents and workers have the shortest commuting range, whereas some of Greater Sudbury and Sault Ste. Marie's commuters are willing to travel great distances to and from work. This analysis reinforces the need to consider the commuting flows for each training area before formulating regional or sub-regional bricks and mortar training strategies.

10.7 Identification of Large Scale Projects

This section identifies and describes those Northern Ontario projects with relatively high economic impact and those projects with particular influence on the tourism sector. These projects have been divided accordingly and presented in Figure 49 and Figure 50 in order of their expected total values.

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[18] The commuter flow data does not indicate the mode of travel for each worker; therefore, modes of travel outside of personal automobiles are conceivable for regular long distance commuters. Accordingly, these commuter flows should be interpreted with caution as some workers may be flying from Sudbury to Toronto for example. With this in mind, the weighted average one-way commuting distance for each worker may be skewed by these types of commuters.

FIGURE 49 HIGH ECONOMIC IMPACT PROJECTS

Project Name	Community	Description
Lower Matagami	Kapuskasing	▪ Ontario Power Generation is reconstructing one existing dam at Smoky Falls and is upgrading three others in the surrounding area. ▪ Estimated to employ around 1,200 people ▪ One of largest hydroelectric development project in the province, and the most expensive at $2.5 billion
Northern ON Transmission System	Northern ON	▪ Projects a series of 10 transmission projects and investments in the Northern distribution network ▪ Expected to create over 6,000 jobs in the region ▪ Nearly half of the $2.3 billion investment to be spent by Hydro One on transmission and distribution projects over the next three years will occur in Northern Ontario
Totten Mine	Worthington	▪ Vale is set to open its Totten Mine in Feb. 2014. ▪ The mine is expected to produce 2,200 tonnes of nickel per day and have a 20 year lifespan. ▪ Around 600 people worked to bring the mine online. ▪ Mine is expected to employ 150 people ▪ Project value of $760 million
North Bay Regional Health Centre	North Bay	▪ North Bay Regional Health Centre totals 66,890 square metres and is situated on a 32 hectare site on Highway 17 West ▪ The hospital services a population of more than 129,000 ▪ Hospital employs 1,874 staff ▪ Project value of $550 million

Consolidated Courthouse	Thunder Bay	■ Consolidated Courthouse is a new multi-storey building with space to accommodate 15 courtrooms including a Multiple Accused High Security courtroom, and four conference/settlement suites ■ During the construction of the building, it is estimated that 225 workers will be on site ■ Project value of $248 million
Hydromega	Kapuskasing	■ Hydromega Energy Group is constructing four new 5.5-megawatt dams on the Kapuskasing River ■ Estimated to employ 70 workers over the next two years ■ Project value of $100 million
Algoma University Expansion	Sault Ste. Marie	■ Algoma University has undergone a campus expansion which includes new student residences and academic facilities ■ University had reached capacity with existing facilities ■ 1,400 students are currently enrolled, however university is planning for 3,000 students by 2020 ■ Project value of $29 million
Laurentian School of Architecture Expansion	Sudbury	■ Construction begins on phase two of the Laurentian School of Architecture building , the 55,000-square-foot building is expected to take 18 months to complete ■ Expected to create jobs for 100 local labourers and tradespeople when construction begins ■ Projects value of $23.9-million
New Post Creek Hydroelectric Project	New Post Creek	■ A new hydroelectric project, in partnership with a First Nation, is expected to begin construction in 2014. ■ The project is expected to create 100 jobs and will be in service by 2017

FIGURE 50 TOURISM PROJECTS

McKeown Commons	North Bay	▪ McKeown Commons is a 134,000-square-foot retail development in the north end of North Bay will bring some new retailers to the city ▪ Tenants include: They include Winners, SportChek, Michaels, PetSmart, Dollar Tree, A&W, Sally Beauty Supply, and St. Louis Wings and Ribs. ▪ Project value of $60-$70 million
Arena Renovation	North Bay	▪ Renovation of the 60 year old facility to expand its seating capacity to 4,200 and ice surface will be modified to conform to OHL standards ▪ Project value of $12 million
Agawa Canyon	Sault Ste. Marie	▪ Tourism Sault Ste. Marie has worked to revamp the Agawa Canyon Train Tour, Northern Ontario's most significant visitor attraction. ▪ Enhancements included new coaches and onboard audiovisual technology ▪ In 2012, overall ridership levels were up 15%, or 3,226 passengers from 2011 ▪ Project value of $11 million
Minnehaha Bay	Sturgeon Falls	▪ Minnehaha Bay, as part of the waterfront redevelopment in Sturgeon Falls, includes a 6,700-square-foot building, new boat slips, a boardwalk and outdoor amphitheater ▪ Project will stimulate tourism sector by increasing the volume of boats on Sturgeon River ▪ Project value of $10 million
Airport Terminal Building	Red Lake	▪ Red Lake airport has constructed a new terminal building, access road and parking lot ▪ Airport was having passenger capacity issues at old terminal building ▪ The new terminal building will be five times bigger than the previous, totalling 1,047 square metres as opposed to 205. ▪ Project value of $7.7 million

Little Current Waterfront Redevelopment	Manitoulin	▪ Little Current waterfront redevelopment project began in 2007 with the refurbishment of the waterfront docks, and addition of pavilions, washrooms, and finger docks. ▪ Final phase of the project includes the addition of a waterfront trail that extends along the waterfront and through the downtown ▪ Project value of $7.4 million
Airport Capacity Project	Kapuskasing	▪ Airport project includes improvements to water capacity, fuelling equipment and apron area. ▪ Project value of $4.5 million
Airport Terminal Upgrade	Timmins	▪ Renovations in the terminal building were conducted to allow an additional carrier to operate from the building ▪ Porter airlines began operating flights from airport on Jan. 2012 ▪ Porter hired 16 people ▪ Project value of $2.3 million
Remi Lake Tourism Facilities	Moonbeam	▪ Municipality of Moonbeam has been investing in their tourism facilities around Remi Lake over the past 6 years ▪ The lake features five major campsites with capacity for more than 650 campers and trailers ▪ In 2012, Moonbeam invested in improving their roadwork, added three boat launches, rebuilt a lookout, and constructed a new 120-by-70 foot dome ▪ Project value of $1 million

10.8 Local Job Demand Reporting System

The real-time Jobs Demand Report's intelligence gathering system provides ongoing monitoring of online job postings with extensive quality assurance to analyze and compile each local job demand report. Provided to Tourism Northern Ontario in quarterly reports, the Data Warehouse and Reporting Engine allows for the monitoring of the entire online local job market. The report also supports monitoring of specific jobs related to the tourism sector. This technology allows for the extraction of important information about each online job posting, including the following metrics:

- Employer industry (NAICS)
- Occupational Category (NOCS)
- Job Source
- Job Qualifications
- Type of job (full-time/part-time, contract/permanent)

For Northern Ontario, job postings data was collected starting in January of 2014 and will be collected on a regular basis and presented quarterly. The initial quarterly results, which will be ready in early April 2014, are limited by the fact that Tourism Northern Ontario has not provided an employer database for integration into the reporting system. Consequently, only those jobs found on typical job board sites, including monster.ca, workopolis.com, careerbuilder.ca, jobbank.gc.ca etc., will be captured in this reporting period. Moving forward, the reporting system will provide meaningful insight into local hiring trends by specific occupations, employer, and geographic area.

Appendix D: Tourism Labour Supply and Demand Projections

10.9 Introduction

This section incorporates recently released National Household Survey data for 2011 regarding employment by industry by occupation. It begins by describing the method used to develop the projections from 2013 to 2023 for a selection of 108 tourism-related occupations to inform this strategy. It also highlights the key findings from the projections.

10.10 Projections Methodology

This section discusses the methodology used to develop the projections.

The Study Area Defined

The study area consists of the following Census Divisions (CDs):

- Algoma District
- Cochrane District
- Sudbury Regional Municipality (Greater Sudbury)
- Kenora District
- Manitoulin District
- Nipissing District
- Rainy River District
- Sudbury District
- Thunder Bay District
- Timiskaming District

Projections were developed for all 10 areas for all 108 selected occupations.

The Selected Occupations

The 108 occupations are listed in the accompanying appendix entitled, “List of Tourism-Related Occupations by NOC”. The selected occupations are primarily but not exclusively found in the following industries:

- Accommodation services
- Air transportation
- All other transportation
- Food and beverage services
- Recreation and entertainment
- Travel services

Labour Projections Methodology Defined

The consulting team developed projections from 2013 to 2023 for each of the 41 industries and 500 occupations for each of the 10 Census Divisions (CDs) in the study area, using a procedure designed to provide comprehensive employment by detailed industry by detailed occupation at the sub-provincial level. This procedure draws on National Household Survey (NHS) 2011 information regarding employment by place-of-work for each sub-provincial area by industry and occupation. Projections for the 108 selected occupations for each CD were extracted from the projections for all 500 occupations. The projections to 2023 relate changes in employment by industry in each CD to SPI’s Ontario-wide base case projections of employment by industry.

Employment by Industry Estimates and Projections Methodology

The latest information available regarding employment by place-of-work (EPOW) by industry at the sub-provincial level in Ontario is that provided by the 2011 National Household Survey (NHS). A model was developed to project EPOW by industry for each of the 10 CDs to 2023 as follows:

- The NHS industry employment estimates for 2011 across the aggregate of the 10 CDs (the study area) were decomposed into those jobs that are export-based and those that are community-based. Export-based industries produce goods shipped to markets outside the community (agriculture, manufacturing), or they provide services for visitors and seasonal residents of the community (hotels, restaurants, recreation attractors, specialized hospitals, colleges, and universities) or for businesses outside the community (specialized financial or professional services). Community-based industries produce services that meet the needs of local residents (retail, medical, education, personal services, etc.). This assessment was based on a comparison of jobs-by-industry-per-capita-ratios in the study area to those for Ontario as a whole.

- The District's export based industries were found to be agriculture, other primary industries, and manufacturing. Export-based jobs in health care, education and government were also found to exist in the study reflecting the regional service roles played in Ontario's north by Greater Sudbury, Thunder Bay, Algoma, and Nipissing.
- Projections of export-based EPOW by industry for each of the 10 CDs for each year from 2011 through to 2023 were developed by linking future employment growth in these industries in each to projected future growth for employment in these industries for Ontario as a whole (according to SPI's projections). In other words, for the period from 2011 to 2023, it was assumed each CD will hold its relative employment position in these export-based industries in Ontario.
- Export-based estimates and projections for each CD were developed for total agriculture; forestry and fishing; total mining, oil and gas; and for each of 21 individual manufacturing industries in this manner.
- Community-based employment by industry for each CD was projected on the basis of expected population growth in each. Ontario Ministry of Finance population projections for each CD (Spring 2013) were used in developing the community-based job projections. The ratio of community-based-jobs-per-capita in 2011 in each CD was calculated for each industry. The per capita ratios for each industry for each CD were projected from 2011 to 2023 to grow at the rate these ratios are expected to grow for Ontario as a whole. The projected ratios for each CD were multiplied by each CD's projected population from 2012 to 2023 to obtain projected values for community-based employment by industry over that span.

The projected trends in the study area's employment by industry from 2013 to 2023 derived in this manner are discussed later in this section.

Employment by Occupation Estimates and Projections Methodology

The projections of employment by occupation for the study area were developed as follows:

- Based on data from the 2011 NHS a matrix was created of employment by place-of-work for each of the 500 occupations for each of the 41 industries for each CD.
- The share in 2011 of all the jobs in each of the 41 industries accounted for by each of the 500 occupations in each CD was calculated.
- The number of jobs in each industry by occupation in 2013 and 2023 was projected by applying the 2011 share by industry by occupation to the projected job total for each industry for each CD in 2013 and 2023.
- This calculation provides a projection of the number of jobs by occupation in each industry in 2013 and 2023, assuming the occupational mix of jobs in each industry in each CD will not change over that period.
- The number of people employed in each of the 500 occupations was summed across the 41 industries to arrive at a projection for 2013 and 2023 of the total number of people employed in each CD in each occupation.

This procedure results in projections of the growth in jobs that will likely occur between 2011 and 2013 and 2023, taking into account projected economic growth in each CD and projected shifts in the mix of industrial employment in each CD.

It is recognized that the occupational mix of jobs within each industry within each CD is likely to change somewhat in the future due to technological change, the adoption of new organizational structures, the hiring of better trained staff, etc. But the extent to which the shares will change is not known. In the absence of such knowledge, the procedure adopted here reflects the extent to which the demand for various occupations is likely to change due to economic growth and to shifts in the industrial mix of jobs, but it does not pick up impacts from shifts in the skill mix within industries per se.

Projected trends in employment by occupation in the study area from 2013 to 2023 are discussed later in this section.

Projections Methodology for the Number of Retirees by Occupation

The 2011 NHS also provides data for employment by place-of-work by occupation for each CD in the study area by age for each of the 500 occupations. The data are provided for the following age groups: 15-24, 25-34, 35-44, 45-54, 55-64 and 65 and over.

In estimating the number of retirees likely to occur in each occupation between 2013 and 2023, the following assumptions were made:

- All of those 65 and older in 2011 will likely have retired by 2023 and will have been replaced by someone younger.
- Those aged 55-64 in 2011 by 2023 will be aged 67-76 and most will have retired.

The potential number of retirees over the period from 2013 to 2023 by occupation in each CD is assumed to include all of those aged 55 and over in 2011. The projected number of retirees in the study area by occupation between 2013 and 2023 is discussed later in this section.

Projections Methodology for Total New Workers by Occupation from 2013 to 2023

The sum of the above two projections – growth in the number employed in each occupation due to economic expansion/contraction and to industrial shifts, plus the number of new employees needed to replace expected retirees from each occupation – equals the total number of new workers each CD will need to attract to each occupation between 2013 and 2023 to fill the newly created and newly vacated jobs projected for each over that span.

A Word About Data Availability

The total population of the study area in 2011 was just over 745,000. The most populated CDs in the area include Greater Sudbury (158,000), Thunder Bay (149,000), Algoma (117,000), Nipissing (85,000), and Cochrane (83,000).

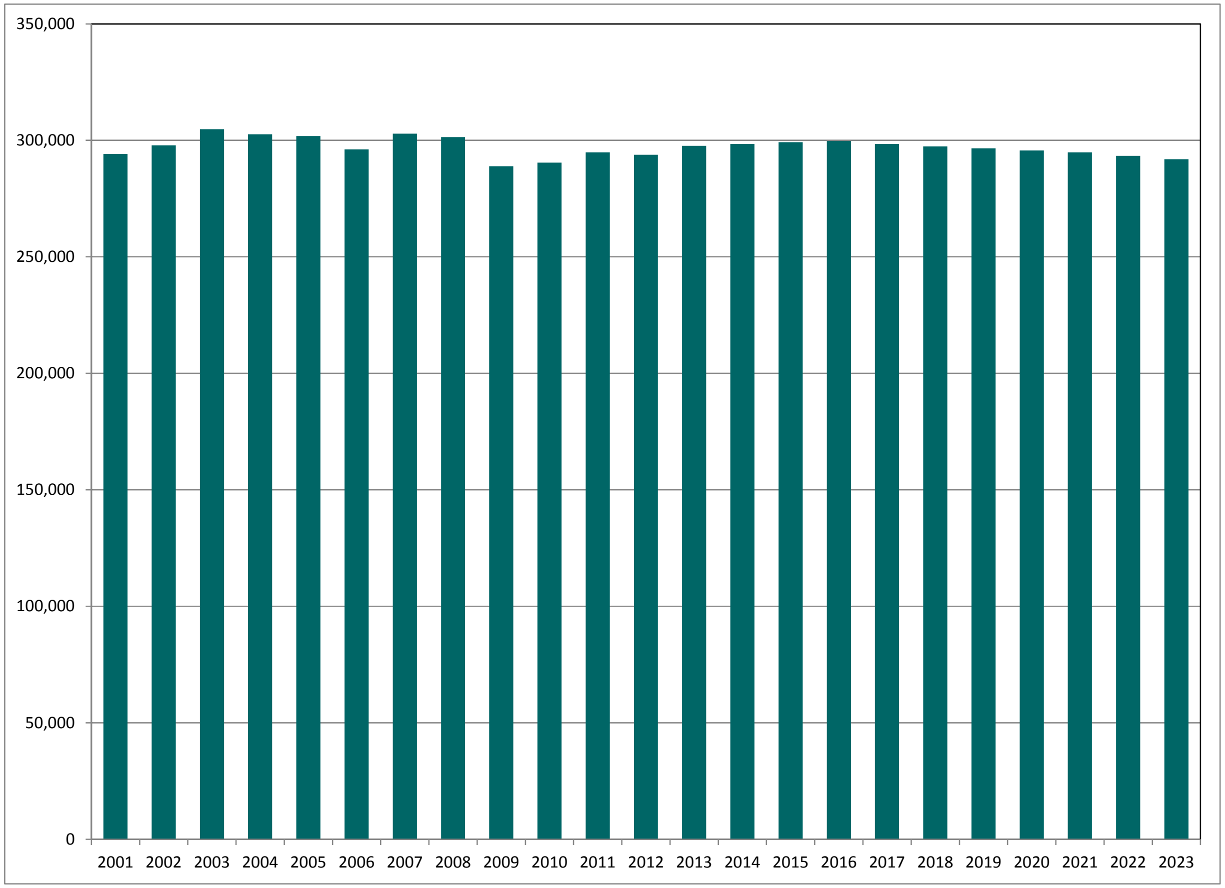
Collectively these 5 CDs account for 80% of the total population across the study area. The populations of the remaining CDs range from a high of 64,000 in Kenora to a low of 13,000 in Manitoulin.

With the NHS results based on samples of households, not on an enumeration of all households, many of the cells in the 500 occupation by 41 industry matrix in the less populated CDs within the study area appear as 0s. This occurs because of Statistics Canada's data release policy that has them randomly round detailed data to the nearest 5. In a similar manner, many of the cells in the 500 occupation by 7 major age group categories in the less populated CDs also appear as 0s. As a result, summing across all 500 occupations for each of the 41 industries for each of the CDs in the base year 2011 in many cases does not sum to the total employment of each industry for each CD. And summing across all 500 occupations for each of the 7 major age groups in the base year 2011 in many cases does not sum to the total employment of each age group for each CD. As a result of this random-rounding procedure the projected gains in employment by occupation in each CD and in potential retirees in each CD under-project to some extent the gains that are likely to occur between 2013 and 2023.

10.11 Labour Projection Results

The projections developed as described above for the 10 Census Divisions (CDs) in the study area in Northern Ontario suggest that employment between 2013 and 2023 will decline gradually, a pattern that reflects employment trends in the area over the previous 13 years. Figure 51 shows that employment across the study area hovered around the 295,000 to 300,000 level over the period from 2001 to 2013. The consulting team projects the level will gradually decline from 297,700 in 2013 to 291,900 (a decline of almost 5,800). These employment projections are consistent with the Ministry of Finance's Spring 2013 population projections for the study area which imply its population will fall by 25,800 (from 754,300 in 2013 to 728,500 in 2023).

FIGURE 51 EMPLOYMENT BY PLACE-OF-WORK IN THE STUDY AREA, ANNUAL DATA 2001 TO 2023



Source: Statistics Canada Labour Force Survey, Censuses of 2001 and 2006, National Household Survey 2011 and projections by SPI.

Employment by Industry

Figure 52 shows the projected change in employment from 2013 to 2023 for the study area as a whole by industry.

FIGURE 52 EMPLOYMENT BY PLACE-OF-WORK IN THE STUDY AREA BY INDUSTRY, ANNUAL DATA 2013 AND 2023

	2013	2023	Change 13-23
Total population	754,286	728,529	-25,757
Total employed all industries	297,696	291,936	-5,760
Agriculture, Fishing	2,615	2,308	-307
Forestry, Logging	2,282	2,005	-278
Mining	14,438	14,000	-438
Manufacturing	18,448	18,248	-200
Food	936	964	28
Textiles, Clothing, Leather	256	200	-56
Wood	2,907	3,092	185
Paper	3,156	2,976	-180
Printing	375	384	10
Petroleum, Coal	60	50	-10
Chemical	438	470	32
Plastics, Rubber	330	352	22
Non-metallic Minerals	801	793	-9
Primary Metals	4,170	3,568	-602
Fabricated Metals	1,440	1,570	129
Machinery	1,517	1,673	156
Computers	191	208	17
Electrical products	59	46	-13
Transportation Equipment	1,110	1,085	-24
Furniture	339	367	28
Miscellaneous	364	451	87
Utilities	2,821	2,511	-309
Construction	11,485	11,371	-114
Wholesale Trade	7,632	7,478	-154
Retail Trade	41,172	39,880	-1,293
Transportation, Warehousing	12,253	11,432	-822
Information, Culture	4,831	4,555	-277
Finance, Insurance	12,195	11,607	-588
Professional Services	11,964	11,855	-109
Other Business Services	8,278	8,646	368
Education	27,857	26,453	-1,404
Health, Social Assistance	48,773	52,119	3,346
Arts, Entertainment, Recreation	5,310	5,597	287
Accommodation	22,148	21,452	-696
Other Services	13,483	12,303	-1,180
Public Administration	29,709	28,117	-1,591

Source: Statistics Canada National Household Survey 2011 and projections by SPI

Employment in the export-based industries of agriculture, fishing, forestry, logging, mining, and manufacturing is expected to decline over this span reflecting province-wide trends. Within manufacturing, a few industries are expected to post modest gains (including wood, machinery, and fabricated metals) but the manufacturing sector overall is expected to lose 200 jobs over the projection horizon.

As noted earlier, the population of the study area is projected to decline between 2013 and 2023 by the Ontario Ministry of Finance. As a result, jobs in community-based (population serving) services in the study area are also expected to decline. **Some noteworthy exceptions are health care and social assistance in which employment is expected to grow by 3,346 (reflecting the impact of the growing health care needs of the aging Baby Boomers on this industry); other business services by 368; and arts, entertainment, and recreation by 287.**

Across all industries, total employment on a place-of-work basis is expected to fall by 5,760 between 2013 and 2023. This decline reflects the change in the number of employed that will occur in the study area due to economic expansion (or in this case economic decline) and due to industrial shifts.

Projected Employment Change Across the 108 Selected Occupations

In 2013, the 108 selected occupations accounted for 119,226 of the total of 297,696 jobs in the study area or for 40% of all jobs in the area.

The model that converts the employment projections by industry above into employment projections by occupation projects that employment across all occupations will decline by 5,760 between 2013 and 2023.

For the selected 108 tourism-related occupations the model projects an employment decline of 2,579. **Thus the model projects the decline across the 108 selected occupations will account for a disproportionally low 31.8% of the overall projected decline in jobs in the study area.**

Projected Replacement of Retirees across the 108 Selected Occupations

The oldest Baby Boomers turned 65 in 2011, and the youngest will turn 65 in 2031. As those Baby Boomers retire, they will need to be replaced by younger workers.

Though economic change in the study area calls for the total number of jobs to decline by 5,760 between 2013 and 2023, the age-by-detailed-occupation data suggests that as many as 39,210 people could retire across all 500 occupations over that span and that across the selected 108 occupations the total number of retirees could reach 17,270. Thus retirees from the selected 108 occupations could account for 45.2% of the potential retirees, a disproportionally high share.

On a net basis, the study area will need to recruit 44,450 new workers across all 500 occupations between 2013 and 2023 (an economic decline of 5,760 offset by a retirement replacement need of 39,210).

On a net basis, the study area will need to recruit 14,691 new workers across the selected 108 occupations between 2013 and 2023 (an economic decline of 2,579 offset by a retirement replacement need of 17,270).

Figure 53 tabulates the economic loss and retirement need components of those occupations within the selected group of 108, accounting for the 25 greatest total net recruitment needs. These 25 occupations within the group of 108 together account for an overall recruitment requirement of 13,980 between 2013 and 2023, or for 95.2% of the overall projected net need of 14,691 across the 108 occupations.

The 10 occupations that will require the greatest recruitment attention are:

- Retail salespersons
- Administrative assistants
- Janitors, caretakers and building superintendents
- Accounting technicians and bookkeepers
- Light duty cleaners
- Administrative officers
- Receptionists
- Bus drivers, subway operators, and other transit operators
- Security guards and related security service occupations
- Cashiers

FIGURE 53 RECRUITMENT REQUIREMENTS AMONG THE SELECTED 108 OCCUPATIONS, ANNUAL DATA 2013 AND 2023 RANKED BY TOTAL DEMAND

NOC #	Occuaption	Employed 2013	Economic Growth	Retirees	Total Demand
	Total employed: all occupations	297,696	-5,760	39,210	33,450
	Total employed: selected 108 occupations	119,226	-2,579	17,270	14,691
	Total employed: top 25 of 108 selected occupations	92,803	-1,930	15,910	13,980
6421	Retail salespersons	13,909	-383	2,350	1,967
1241	Administrative assistants	8,076	-161	1,535	1,374
6733	Janitors, caretakers and building superintendents	5,702	-92	1,380	1,288
1311	Accounting technicians and bookkeepers	2,932	-38	1,020	982
6731	Light duty cleaners	4,263	35	935	970
1221	Administrative officers	4,350	-32	985	953
1414	Receptionists	3,533	94	570	664
7512	Bus drivers, subway operators and other transit operators	2,032	-127	760	633
6541	Security guards and related security service occupations	1,987	29	490	519
6611	Cashiers	7,706	-236	735	499
6322	Cooks	4,627	-63	555	492
6552	Other customer and information services representatives	4,256	-9	495	486
1431	Accounting and related clerks	2,768	-68	505	437
7513	Taxi and limousine drivers and chauffeurs	834	-55	455	400
1111	Financial auditors and accountants	2,485	-59	415	356
6711	Food counter attendants, kitchen helpers and related support occı	8,473	-151	480	329
1224	Property administrators	1,027	-45	305	260
6622	Store shelf stockers, clerks and order fillers	3,490	-119	360	241
714	Facility operation and maintenance managers	531	-27	240	213
631	Restaurant and food service managers	2,189	-67	265	198
2263	Inspectors in public and environmental health and occupational he	504	-9	185	176
111	Financial managers	759	-21	195	174
632	Accommodation service managers	717	-32	185	153
8612	Landscaping and grounds maintenance labourers	1,348	0	120	120
7321	Automotive service technicians, truck and bus mechanics and	4,304	-292	390	98

Source: Statistics Canada National Household Survey 2011 and projections by SPI.

The top 10 occupations collectively account for two-thirds of the recruitment attention that will be required among the 108 selected occupations.

In almost every case, there is an economic decline in need projected for each of the top 25 occupations in Figure 53. Nevertheless, in every case there is a significant positive recruitment need due to potential retirees that more than offsets the decline due to economic contraction.

Figure 54 tabulates the total demand from 2013 to 2023, resulting both from economic decline and retirement replacement across the 10 CDs in the study area. Included is the total across all 500 occupations, across the sum of the selected 108 occupations and for each of the top 25 occupations tabulated in Figure 53. Figure 54 reveals that the greatest recruitment effort for the selected 108 occupations will be required in Greater Sudbury (4,378), Thunder Bay (3,402), Nipissing (2,301), and Algoma (2,078). These four CDs collectively account for a total recruitment effort of 12,159 (or for 82.8 % of the effort required across all 10 CDs).

FIGURE 54 RECRUITMENT REQUIREMENTS AMONG THE TOP 25 OF THE SELECTED 108 OCCUPATIONS BY CENSUS DIVISION, TOTAL CHANGE DUE TO ECONOMIC DECLINE AND RETIREES.

NOC #	Occupation	Algoma	Cochrane	Greater Sudbury	Kenora	Manit'n	Nipissing	Rainy River	Sudbury	Thunder Bay	Timisk'g
	Total employed: all occupations	4,559	1,875	10,376	2,346	459	5,241	179	-440	8,255	602
	Total employed: selected 108 occupations	2,078	1,088	4,378	1,091	207	2,301	30	-220	3,402	338
	Total employed: top 25 of 108 selected occupations	2,050	1,135	3,980	1,113	181	2,077	87	-158	3,114	401
6421	Retail salespersons	171	166	723	146	25	350	2	-17	304	97
1241	Administrative assistants	229	22	383	105	1	149	24	4	418	38
6733	Janitors, caretakers and building superintendents	248	176	256	130	60	139	10	-1	251	20
1311	Accounting technicians and bookkeepers	164	41	226	48	30	134	37	30	258	13
6731	Light duty cleaners	246	90	120	88	3	150	26	-14	244	18
1221	Administrative officers	121	53	247	99	28	131	-10	25	248	12
1414	Receptionists	116	10	206	67	1	156	-2	-9	120	-1
7512	Bus drivers, subway operators and other transit operators	71	132	87	17	6	137	-4	-11	179	19
6541	Security guards and related security service occupations	101	96	115	57	0	34	0	-4	119	0
6611	Cashiers	15	1	216	95	0	148	-16	-62	50	51
6322	Cooks	28	68	160	44	1	75	13	-7	119	-10
6552	Other customer and information services representatives	142	2	222	-3	0	32	-2	-14	81	27
1431	Accounting and related clerks	59	14	191	36	10	38	-8	0	67	31
7513	Taxi and limousine drivers and chauffeurs	70	30	113	10	0	53	0	0	56	68
1111	Financial auditors and accountants	64	37	87	30	0	49	9	-18	88	11
6711	Food counter attendants, kitchen helpers and related support occupations	-27	32	181	45	3	61	-7	-17	47	12
1224	Property administrators	11	-8	86	-3	0	99	0	0	77	0
6622	Store shelf stockers, clerks and order fillers	31	46	59	45	0	21	-6	-20	78	-14
714	Facility operation and maintenance managers	97	19	40	14	0	0	-2	0	30	15
631	Restaurant and food service managers	46	3	122	-2	0	13	-7	-6	35	-5
2263	Inspectors in public and environmental health and occupational health and safety	24	44	58	-1	0	0	0	0	50	0
111	Financial managers	-6	34	45	9	0	29	0	0	33	29
632	Accommodation service managers	45	-3	21	23	0	1	46	-5	27	-2
8612	Landscaping and grounds maintenance labourers	-4	41	13	12	1	24	-2	0	38	-3
7321	Automotive service technicians, truck and bus mechanics and	-9	-12	3	4	11	53	-14	-12	96	-23

Source: Statistics Canada National Household Survey 2011 and projections by SPI.

The accompanying Microsoft Excel worksheet file contains for each of the 10 CDs for each of the 108 selected occupations data for:

- Employment in 2013
- Projected employment in 2023
- The projected change in employment due to economic decline/industrial shifts

- The projected number of retirees
- The projected total demand

10.12 Highlighted Projection Findings

Despite the projected decline between 2013 and 2023 in the total number of jobs and in the total number of jobs across the selected 108 occupations, many of the current occupants of those jobs today will retire over the next decade. Accordingly, significant net recruitment will be required to replace the retirees in order to meet the overall labour market requirements of Northern Ontario in the years ahead.

Appendix E: List of Tourism-Related Occupations by NOC

Total - Occupation - National Occupational Classification (NOC) 2011		
0111 Financial managers	2244 Aircraft instrument, electrical and avionics mechanics, technicians and i	6331 Butchers, meat cutters and fishmongers - retail and wholesale
0112 Human resources managers	2263 Inspectors in public and environmental health and occupational health ar	6332 Bakers
0113 Purchasing managers	2271 Air pilots, flight engineers and flying instructors	6341 Hairstylists and barbers
0114 Other administrative services managers	2272 Air traffic controllers and related occupations	6421 Retail salespersons
0121 Insurance, real estate and financial brokerage managers	2275 Railway traffic controllers and marine traffic regulators	6511 Maîtres d'hôtel and hosts/hostesses
0122 Banking, credit and other investment managers	2282 User support technicians	6512 Bartenders
0124 Advertising, marketing and public relations managers	3132 Dietitians and nutritionists	6513 Food and beverage servers
0213 Computer and information systems managers	3236 Massage therapists	6521 Travel counsellors
0511 Library, archive, museum and art gallery managers	3237 Other technical occupations in therapy and assessment	6522 Pursers and flight attendants
0513 Recreation, sports and fitness program and service directors	4163 Business development officers and marketing researchers and consulta	6523 Airline ticket and service agents
0631 Restaurant and food service managers	4167 Recreation, sports and fitness policy researchers, consultants and prog	6524 Ground and water transport ticket agents, cargo service representative
0632 Accommodation service managers	5112 Conservators and curators	6525 Hotel front desk clerks
0651 Managers in customer and personal services, n.e.c.	5132 Conductors, composers and arrangers	6531 Tour and travel guides
0714 Facility operation and maintenance managers	5133 Musicians and singers	6532 Outdoor sport and recreational guides
1111 Financial auditors and accountants	5134 Dancers	6533 Casino occupations
1122 Professional occupations in business management consulting	5135 Actors and comedians	6541 Security guards and related security service occupations
1123 Professional occupations in advertising, marketing and public r	5136 Painters, sculptors and other visual artists	6552 Other customer and information services representatives
1211 Supervisors, general office and administrative support workers	5212 Technical occupations related to museums and art galleries	6562 Estheticians, electrologists and related occupations
1221 Administrative officers	5223 Graphic arts technicians	6611 Cashiers
1222 Executive assistants	5231 Announcers and other broadcasters	6622 Store shelf stockers, clerks and order fillers
1223 Human resources and recruitment officers	5232 Other performers, n.e.c.	6711 Food counter attendants, kitchen helpers and related support occupati
1224 Property administrators	5241 Graphic designers and illustrators	6721 Support occupations in accommodation, travel and facilities set-up ser
1225 Purchasing agents and officers	5242 Interior designers and interior decorators	6722 Operators and attendants in amusement, recreation and sport
1226 Conference and event planners	5243 Theatre, fashion, exhibit and other creative designers	6731 Light duty cleaners
1241 Administrative assistants	5244 Artisans and craftspersons	6732 Specialized cleaners
1253 Records management technicians	5252 Coaches	6733 Janitors, caretakers and building superintendents
1311 Accounting technicians and bookkeepers	5254 Program leaders and instructors in recreation, sport and fitness	6741 Dry cleaning, laundry and related occupations
1414 Receptionists	6211 Retail sales supervisors	7294 Painters and decorators (except interior decorators)
1415 Personnel clerks	6222 Retail and wholesale buyers	7304 Supervisors, railway transport operations
1431 Accounting and related clerks	6311 Food service supervisors	7305 Supervisors, motor transport and other ground transit operators
1432 Payroll clerks	6312 Executive housekeepers	7321 Automotive service technicians, truck and bus mechanics and mechar
2171 Information systems analysts and consultants	6313 Accommodation, travel, tourism and related services supervisors	7441 Residential and commercial installers and servicers
2174 Computer programmers and interactive media developers	6315 Cleaning supervisors	7512 Bus drivers, subway operators and other transit operators
2175 Web designers and developers	6316 Other services supervisors	7513 Taxi and limousine drivers and chauffeurs
2224 Conservation and fishery officers	6321 Chefs	8255 Contractors and supervisors, landscaping, grounds maintenance and l
2225 Landscape and horticulture technicians and specialists	6322 Cooks	8612 Landscaping and grounds maintenance labourers

Appendix F: Northern Ontario Tourism Training Inventory

An inventory of all the available training programs/courses related to the tourism sector in Northern Ontario was created in Excel to provide an easily updated and searchable tool for RTO13. The information that was collected in the inventory was the name of the institution and program, program description, training level, program duration, and delivery method. In order to create the inventory, all the university and college programs were examined, and if the program helped to train workers in the tourism sector, they were included in the inventory. The same approach was used for training organizations; if they held any seminars or courses that trained tourism workers, those courses/seminars were included in the inventory. This inventory is presented in the accompanying Excel file.