TOURISM LABOUR MARKET INITIATIVE - NORTHEASTERN ONTARIO

TOURISM NORTHERN ONTARIO

The Labour Market Group
Guiding partners to workforce solutions.

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1. EXECUTIVE SUMMARY

As Tourism is an essential sector in Northern Ontario, it is critical to ensure its growth and sustainability into the future. Northern Ontario has several key organizations committed to assisting the tourism sector with development, including The Labour Market Group (LMG) and Tourism Northern Ontario (TNO).

The formation of a partnership between LMG and TNO allows for a concentrated effort towards identifying workforce challenges and opportunities in the tourism sector. Joined by the organizations' counterparts, the Workforce Planning for Sudbury & Manitoulin, Far NorthEast Training Board and Northeastern Ontario Tourism, an opportunity to create a regional study was initiated.

A detailed analysis of the current workforce landscape was essential to foster sustainable growth within the tourism sector. As a result, a research study referred to as the The Labour Market Initiative (LMI) was developed. The LMI is intended to be a useful tool for a range of stakeholders who can lead the growth of the industry's labour market in Northeastern Ontario.

The purpose of the Northeastern Ontario LMI is to:

- Analyze the current landscape affecting the regional tourism industry;
- Identify current and future regional labour force challenges;
- Recognize themes that are occurring and impacting the sector's labour force sustainability; and
- Identify actions that can be implemented to support balanced growth.

The aim of this study is to develop a greater understanding of the existing and anticipated labour force deficiencies and challenges across the tourism industry. Based on the feedback received, the majority of employers anticipate that employment in the sector will grow a little overall in the next 2-5 years. The labour force pressures facing the industry were prioritized as follows:

- Recruitment difficulties;
- Skills deficiencies; and
- Retention difficulties.

The information presented in this report provides an analysis of the research collected throughout the process. While this data plays a significant role in setting the foundation for growth, there are several crucial contributing factors that will affect the tourism sector's ability to be successful. Ensuring that the industry is at the forefront throughout the implementation of new initiatives is a critical element.

Similar LMI research studies were undertaken in Northern Ontario sub-regions, North Central/Algoma and Northwest simultaneously to the Northeastern LMI study. The data collected was analyzed and pan-Northern recommendations were identified. The recommendations and action items are summarized in The LMI Northern Ontario Implementation Plan. This document complements the research reports for the two additional sub-regions and provides a roadmap for potential new initiatives to combat identified challenges and gaps.

The Implementation Plan offers pan-Northern and sub-regional strategies based on identified trends and themes. The plan has been developed as a mechanism to assist the development of a strong and committed labour force within the tourism sector. With an overall vision to create a healthy sector, the Implementation Plan identifies strategies to build upon opportunities and mitigate challenges.

2. INTRODUCTION

Tourism in Ontario contributes more to provincial GDP than what the entire primary sector provides, including the forestry and mining sectors[1] . As it is an essential industry in Northern Ontario, it is critical to ensure tourism growth and sustainability into the future. The Labour Market Group (LMG) and Tourism Northern Ontario (TNO) are two key organizations that are committed to assisting in the development the tourism sector.

The Labour Market Group (LMG) is one of 25 workforce planning boards across Ontario. LMG conducts localized research and actively engages organizations and community partners in local labour market projects.

Tourism Northern Ontario (TNO) is one of 13 Regional Tourism Organizations across Ontario. The organization is committed to building a strong and vibrant sector and increasing tourism receipts. Marketing, investment attraction, product development and workforce and industry training are the four priority areas that contribute to the development and progress of the tourism sector.

The formation of a partnership between LMG and TNO allows for a concentrated effort towards understanding workforce challenges and discovering opportunities for growth in the tourism sector. Working with the organizations' counterparts, the Workforce Planning for Sudbury & Manitoulin, Far NorthEast Training Board and Northeastern Ontario Tourism, the partnership created an opportunity to initiate a regional study.

A detailed analysis of the current tourism workforce landscape is essential to fostering industry growth, leading to the development of a research study herein referred to as The Labour Market Initiative (LMI). This initiative focused on the three tourism sub-regions of Northern Ontario, including Northeastern, North Central/Algoma and Northwest. To ensure a local perspective within each sub-region, the market study implemented a phased approach. Phase one of the project included an assessment of the labour market landscape in Northeastern Ontario, while phase two focused on North Central/Algoma and Northwest Ontario. This document relates to Northeastern Ontario and the labour market landscape currently impacting the tourism sector. The Northeastern Ontario LMI was undertaken to understand the labour and skills climate in the tourism industry at a regional level.

The partnering organizations hired a project team to conduct the assessment. The team included representatives from Karen Jones Consulting Inc., Markey Consulting and Labour Market Analyst, Tom Zizys. The role of the project team was to analyze existing and anticipated tourism labour market deficiencies utilizing regional detail. The findings presented in this report reflect the outcomes of a detailed analysis conducted to inform future labour force policy in the tourism sector.

Based on the results research and analysis, the LMI will include recommendations for action that when implemented will strive to:

- Foster relationships with industry and regional partners aimed at combating current and future workforce challenges.
- Position the tourism sector as an appealing industry for career advancement.
- Decrease workforce challenges addressed by employers.
- Foresee possible workforce shortages and implement strategies to minimize impact.
- Implement regional strategies reflective of local needs while working within a pan-Northern model to ensure consistency and efficiency.

[1] http://www.mtc.gov.on.ca/en/publications/Discover_Ontario_en.pdf

3. BACKGROUND

The LMI identifies gaps and creates strategies that can be implemented to strengthen the status of the tourism workforce. The LMI study highlights comparative industry data across the Northeastern Ontario tourism sector and Ontario while analyzing and comparing results based on an industry-wide survey.

The study area includes six districts located throughout Northeastern Ontario: Nipissing, Temiskaming, Cochrane, Manitoulin, Sudbury and Greater Sudbury. Primary research includes a review of existing data, a survey and one-on-one interviews. The LMI involves a cross representation of businesses and geography and includes significant statistical data and responses from 150 industry representatives from throughout the region. The respondents include those who completed the survey and key informants who provide qualitative information throughout the process.

IMPORTANCE OF TOURISM

Over the decades, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the world.[2] Tourism is a significant industry in Canada, Ontario and more specifically Northeastern Ontario, accounting for thousands of jobs annually. According to the Regional Tourism Workforce & Training Strategy prepared by Miller Dickinson Blais, tourism-related occupations account for 40% of the total labour force in Northern Ontario.

Northeastern Ontario relies on the tourism sector for the growth and sustainability of both its urban and rural economies. Not only does the sector have a positive impact in terms of direct employment, but it also supports resource industries through the provision of services such as accommodations.

DEFINITION OF TOURISM

The definition of tourism used in the National Tourism Indicators (NTI) is that adopted by the World Tourism Organization and the United Nations Statistical Commission: “the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.” According to the Ministry of Tourism, Culture and Sport, in Canada, for a domestic trip to be part of tourism it has to be an “out-of-town” trip and, in addition, for same day trips it has to be 40 kilometers one-way from the traveller’s home.

TOURISM ACTIVITY

The following section provides some basic data relating to the tourism industry in Northeastern Ontario. This analysis covers the following districts:

- Nipissing
- Manitoulin
- Greater Sudbury
- Sudbury
- Timiskaming
- Cochrane (while this district is divided between Northeastern and North Central/Algoma, the data is only available at the entire district level)

[2] http://www2.unwto.org/content/why-tourism

The size and shape of the tourism workforce is related to the nature of tourism in a local area. Aspects for consideration include the number of visitors, what they do and where they stay. The following describes the profile of tourism activity in each district.

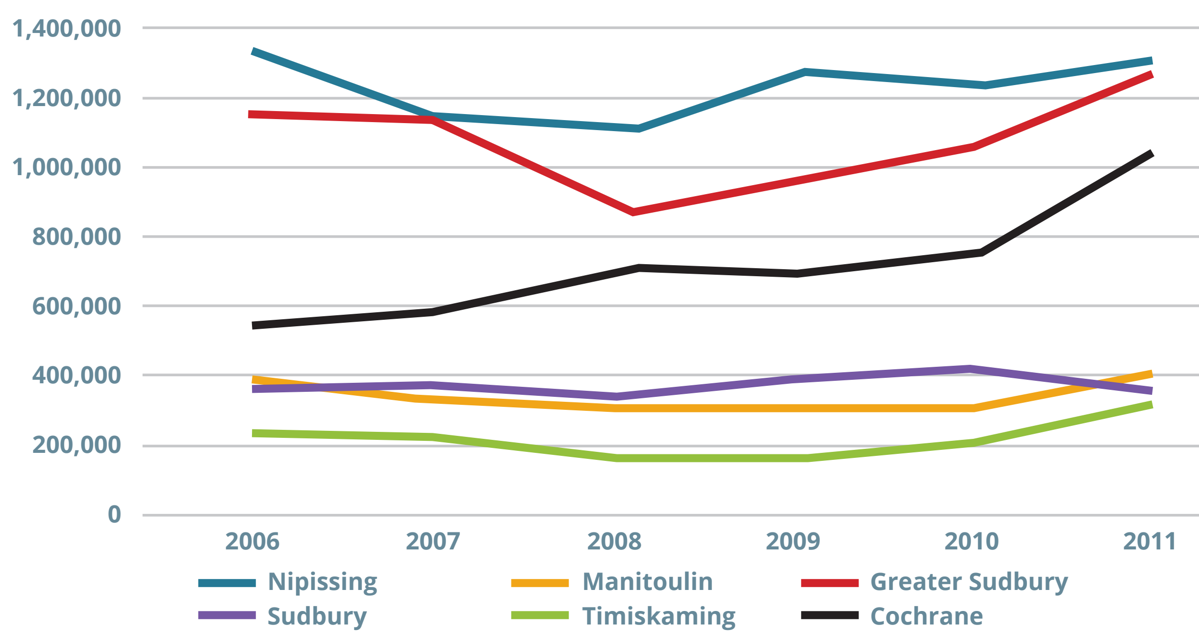
Total Number of Tourist Visits

The first relevant statistic is the number of tourist-visits to the area. Statistics Canada conducts a detailed survey of tourism across Canada. Being a survey, it represents a sample of tourists, and with smaller geographic areas the samples also can be relatively small. As a result, it is useful to show the data over a couple of years, to illustrate possible trends, while sometimes it is helpful to average out the responses over several years, to reduce the margin of error. Finally, some of the survey questions have been changed between 2010 and 2011, which may have affected the ability to compare data before and after 2010. As a result, the available data will often be illustrated showing two timeframes: 2006-2010, and 2011, the most recent date for which data is available. Table 1 provides the survey estimates for the number of tourist visits to each district for 2006 to 2011. The trends and comparisons between districts are best illustrated by a chart. To acknowledge the changes in the survey, the figures for 2011 are marked by a dotted line rather than a solid line.

TABLE 1 Annual number of person-visits, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane, 2006-2011

	2006	2007	2008	2009	2010	2011
Nipissing	1,323,530	1,145,260	1,112,431	1,270,006	1,226,557	1,299,983
Manitoulin	383,139	335,426	313,427	310,062	313,798	410,170
Greater Sudbury	1,150,631	1,140,592	875,385	975,797	1,067,507	1,281,666
Sudbury	364,906	364,217	343,371	392,693	412,192	358,641
Timiskaming	240,361	216,653	170,072	176,156	210,766	328,158
Cochrane	548,489	588,476	709,463	695,294	762,081	1,037,646

CHART 1 Annual number of person-visits, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane



Overall the patterns of tourist-visits are relatively consistent, with the districts of Nipissing and Greater Sudbury having the highest number of visitors. Sudbury, Manitoulin and Timiskaming Districts cluster at the lower end of the visitor numbers with Cochrane in between. In almost all cases there is an increase in the estimated number of visitors between 2006-10 and 2011, a relatively sharp increase in some cases that seemingly go beyond the historic trend. This especially applies to Cochrane and to an extent Greater Sudbury.

These absolute numbers require context. One way to evaluate the size of these numbers is in relation to the resident population of the area being visited. Table 2 compares the average number of visitors 2006-2010 to the 2011 population of each area.

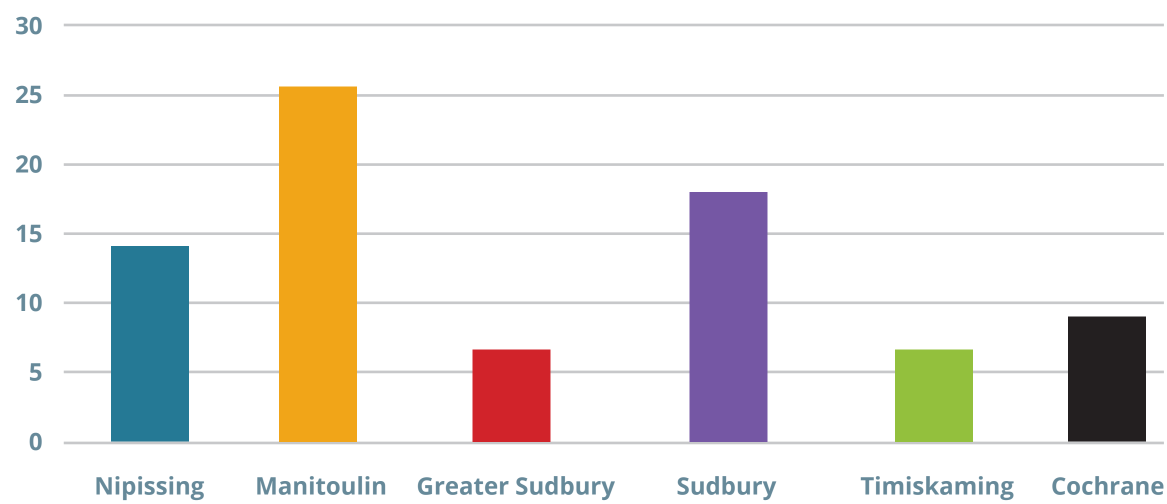
TABLE 2 Population and person-visit numbers and ratios, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane[3]

	Nipissing	Manitoulin	Greater Sudbury	Sudbury	Timiskaming	Cochrane
Population	84,736	13,048	160,376	21,196	32,634	81,122
% of Ontario	0.66%	0.10%	1.25%	0.16%	0.25%	0.63%
Person-visits	1,215,557	331,170	1,041,982	375,476	202,802	660,761
% of Ontario	1.18%	0.32%	1.01%	0.37%	0.20%	0.64%
Person-visits/population	14.4	25.4	6.5	17.7	6.2	8.2

[3] The population numbers are from Statistics Canada's 2011 Census; the person-visit numbers are the average figure from 2006 to 2010 for each destination, from Statistics Canada's Travel Survey of Residents of Canada and the International Travel Survey.

Chart 2 compares the weight of tourist-visits. From this perspective, Manitoulin is particularly high with roughly 25 person-visits a year per resident. This is compared to roughly 6 person-visits per resident for each of Greater Sudbury and Timiskaming Districts. Nipissing and Sudbury Districts also have a relatively high person-visits per residents ratio, even though Nipissing has roughly three times the number of person-visits overall as Sudbury.

CHART 2 Ratio of person-visits to resident population, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane



Seasonality of Person-Visits

The level of tourism activity is often related to the seasons, with some regions attracting visitors during the summer while others are prominent winter destinations. The following charts illustrate the data for each quarter from 2006 through 2010. This provides a visualization of the highs and lows by season and the variability between years. It is important to note that some of that variability may be due to the smaller survey sample sizes.

Due to the different number of visitors, the scale on the left-hand side of the charts varies, therefore the absolute amounts cannot be compared by the length of the bar from chart to chart.

The seasonal quarters are defined as follows:

Q1	**First quarter**	January, February, March
Q2	**Second quarter**	April, May, June
Q3	**Third quarter**	July, August, September
Q4	**Fourth quarter**	October, November, December

CHART 3 Seasonality of person-visits, Nipissing, 2006-2010

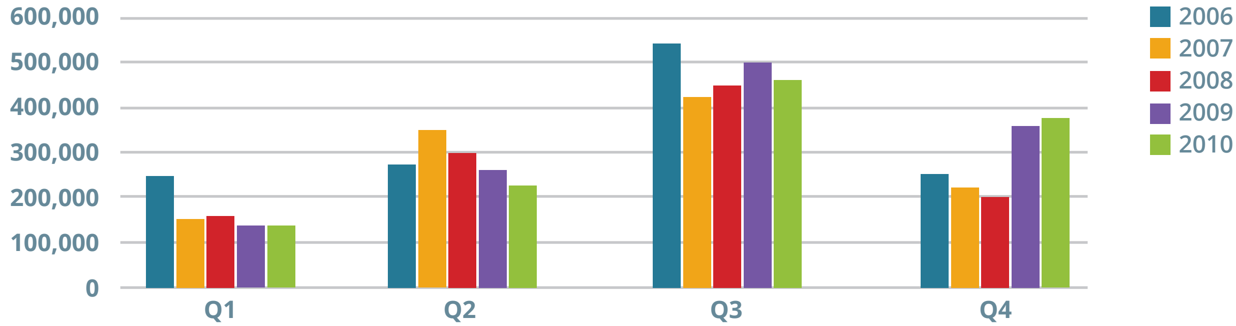


CHART 4 Seasonality of person-visits, Manitoulin, 2006-2010

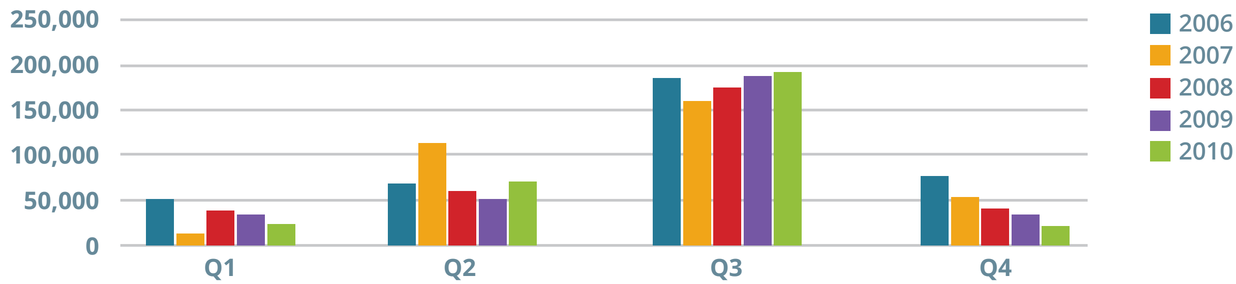


CHART 5 Seasonality of person-visits, Greater Sudbury, 2006-2010

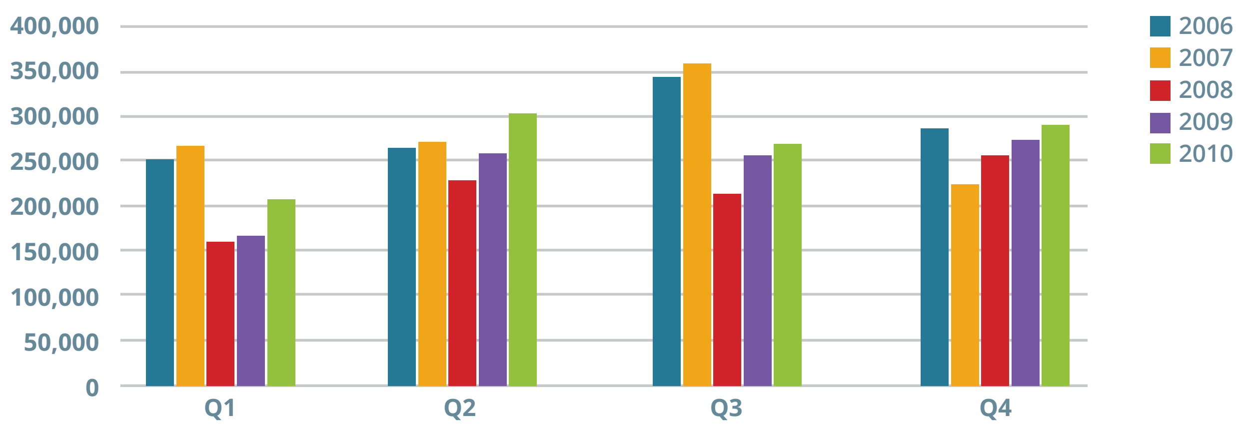


CHART 6 Seasonality of person-visits, Sudbury, 2006-2010

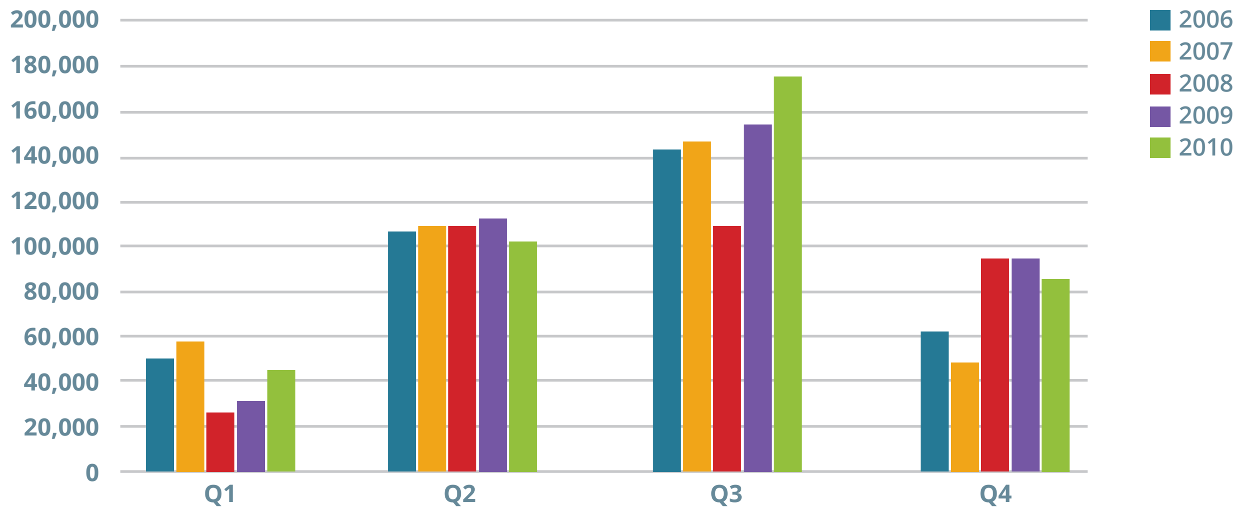


CHART 7 Seasonality of person-visits, Timiskaming, 2006-2010

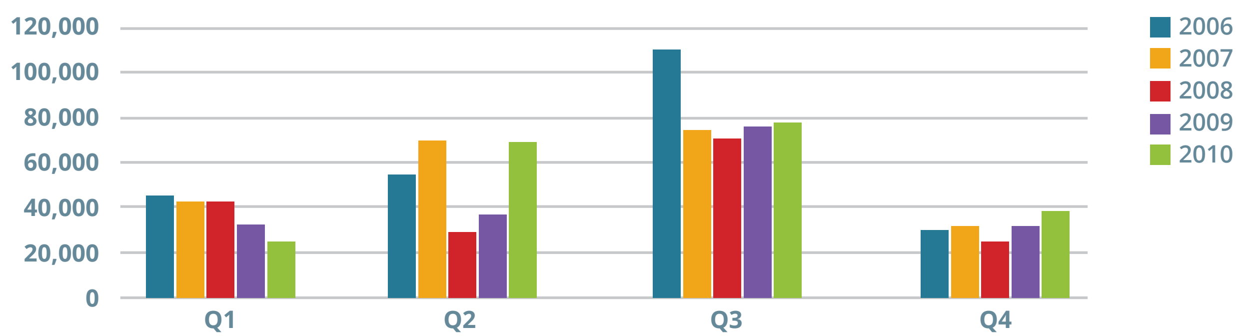
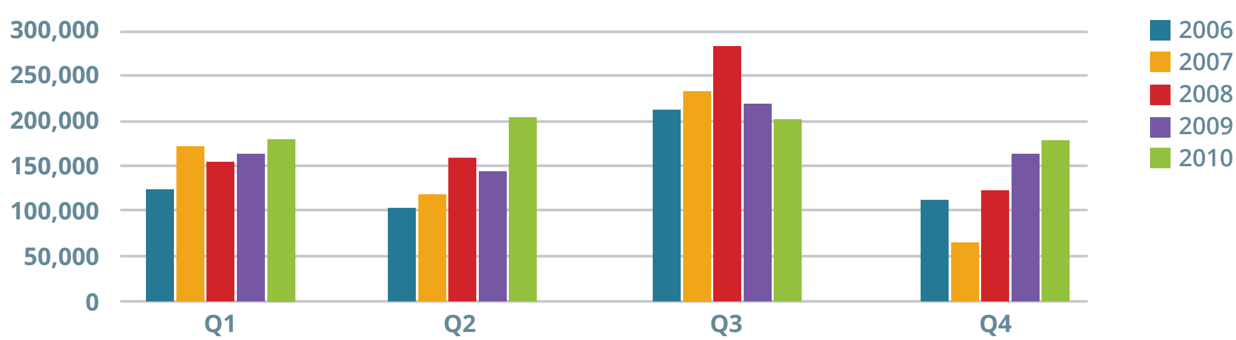
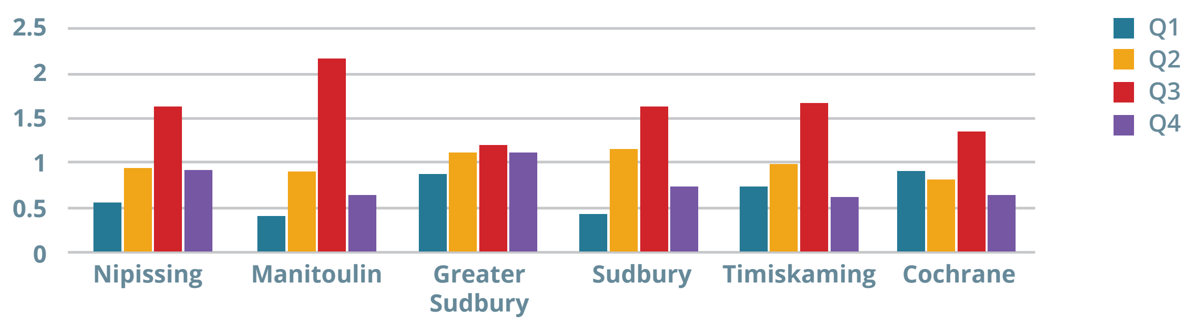


CHART 8 Seasonality of person-visits, Cochrane, 2006-2010



This variance by season in the number of person-visits has a great impact on the provision of services to visitors, and consequently on the seasonality of employment in tourism-related occupations. To compare the seasonality of visits, one can express the average number of visitors per each quarter as a ratio to the average number of visitors per quarter each year. Thus, if the number of visitors in a given quarter is 25% more than the average number of visitors for the average of all quarters, the ratio would be 1.25. If the number of visitors is 25% less than the average, the ratio would be 0.75. In this way, different geographies can be compared when the number of visitors is very different. The results are presented in Chart 9.

CHART 9 Ratio of seasonality of visitors, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane, 2006-2010



Expressed through these ratios, it is clear that Manitoulin has by far the greatest degree of seasonality to its person-visit profile, with the number of visitors in Quarter 3 twice as high as the average for all quarters. Timiskaming, Nipissing and Sudbury also have a high degree of seasonality, with slightly over 1.5 times as many person-visits in Quarter 3 compared to the average. Cochrane follows with somewhat less than 1.5 times for Quarter 3 compared to the average.

On the other hand, Greater Sudbury has far less seasonality, with only Quarter 1 falling off the average somewhat (at 0.82). This would bode well for the continuity through the year of jobs related to the tourism sector.

Origin and Purpose of Visits

Table 3 identifies the origin of these visitors, for each of the six districts.

TABLE 3 Population and person-visit numbers and ratios, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane[3]

	NIPISSING		TOP FIVE ORIGINS OF VISITS FOR NIPISSING				
	Canada	Ontario	Nipissing	Greater Sudbury	Toronto	York	Cochrane
Number	1,138,121	1,072,413	210,798	128,905	62,315	60,332	53,743
Percent	94%	88%	17%	11%	5%	5%	4%

	MANITOULIN		TOP FIVE ORIGINS OF VISITS FOR MANITOULIN				
	Canada	Ontario	Greater Sudbury	Manitoulin	Toronto	Nipissing	Halton
Number	297,992	295,226	96,404	54,588	29,835	10,068	8,642
Percent	90%	89%	29%	17%	9%	3%	3%

	SUDBURY REGION		TOP FIVE ORIGINS OF VISITS FOR SUDBURY REGION				
	Canada	Ontario	Nipissing	Greater Sudbury	Sudbury	Cochrane	Manitoulin
Number	989,733	957,726	125,408	121,151	110,934	88,780	87,042
Percent	95%	92%	12%	12%	11%	9%	8%

	SUDBURY DISTRICT		TOP FIVE ORIGINS OF VISITS FOR SUDBURY DISTRICT				
	Canada	Ontario	Greater Sudbury	Cochrane	Algoma	Manitoulin	Nipissing
Number	345,661	341,015	162,410	50,454	19,237	19,013	12,264
Percent	92%	91%	43%	13%	5%	5%	3%

	TIMISKAMING		TOP FIVE ORIGINS OF VISITS FOR TIMISKAMING				
	Canada	Ontario	Cochrane	Nipissing	Greater Sudbury	Timiskaming	Toronto
Number	177,131	164,936	46,491	22,103	16,621	10,529	6,719
Percent	87%	81%	23%	11%	8%	5%	3%

	COCHRANE		TOP FIVE ORIGINS OF VISITS FOR COCHRANE				
	Canada	Ontario	Cochrane	Greater Sudbury	Timiskaming	Thunder Bay	Toronto
Number	1,138,121	1,072,413	210,798	128,905	62,315	60,332	53,743
Percent	94%	88%	17%	11%	5%	5%	4%

In most instances, the surrounding area is the largest source for person-visits to any given district. Cochrane is unique as 73% of visitors come from within the district. In a few instances, the top five origins of visitors come from the Greater Toronto Area.

Manitoulin District -12% come from either Toronto or Halton
Nipissing District -10% come from either Toronto or York Region
Timiskaming District - 3% come from Toronto
Cochrane District - 2% come from Toronto

Overall, close to 90% of visitors come from Ontario, with the remaining 10% visiting from other parts of Canada. Most foreign tourists come from the United States. The average proportion of Americans among all person-visits is as follows:

Nipissing .... 4.2 %
Manitoulin .... 7.8 %
Greater Sudbury .... 4.1 %
Sudbury .... 7.5 %
Timiskaming .... 11.6 %
Cochrane .... 1.8 %

The travel survey also asks respondents about the purpose of their visit. The change in the survey between 2010 and 2011 resulted in several new answer categories. Tables 4a and 4b provide the percentage responses averaged for 2006 to 2010 and for 2011.

There are some notable differences between the figures for 2006-2010 and for 2011. Two possible reasons may account for this: (1) some changes in the wording and format of the survey may have resulted in somewhat different answers; and (2) the 2011 figures represent only one year and so there is no smoothing out of possible variations by averaging several years of responses.

TABLE 4a Purpose of visit, average for 2006-2010 and 2011, Nipissing, Manitoulin and Greater Sudbury

	NIPISSING		MANITOULIN		GREATER SUDBURY	
	2006/10	2011	2006/10	2011	2006/10	2011
PERSONAL	96%	96%	98%	97%	94%	88%
Pleasure	54%	44%	64%	44%	37%	22%
Friends/relatives	36%	45%	27%	30%	45%	42%
Shopping		3%		1%		15%
Conventions		1%		1%		0%
Other personal	6%	4%	7%	21%	12%	9%
BUSINESS	4%	4%	3%	3%	7%	13%
Meetings	0%	0%	0%	0%	0%	0%
Conventions	2%	3%	1%	0%	3%	2%
Other business	3%	1%	2%	3%	4%	11%

The data suggests a number of observations in all areas profiled. Personal reasons are the purpose of the vast majority of visits. The comparable data for Ontario as a whole for 2011 indicates that 89% of visits are for pleasure and 11% for business.

Manitoulin and Sudbury in particular have a somewhat higher proportion of visits for personal reasons than elsewhere, and these areas also have a higher proportion of personal visits for pleasure, as opposed to visiting friends or relatives. Greater Sudbury and Cochrane also experience more visits for the purpose of shopping.

There appears to be more instances of discontinuity in the data on business visits, comparing 2006-2010 and 2011. Nevertheless, the pattern appears to be that Greater Sudbury and Cochrane experience more visits for business than the other areas.

TABLE 4b Purpose of visit, average for 2006-2010 and 2011, Sudbury, Timiskaming and Cochrane

	SUDBURY		TIMISKAMING		COCHRANE	
	2006/10	2011	2006/10	2011	2006/10	2011
PERSONAL	98%	93%	94%	96%	93%	85%
Pleasure	62%	49%	46%	22%	45%	30%
Friends/relatives	32%	36%	41%	58%	36%	38%
Shopping		5%		4%		8%
Conventions		2%		4%		0%
Other personal	4%	1%	7%	8%	12%	9%
BUSINESS	3%	8%	6%	4%	7%	16%
Meetings	0%	0%	0%	0%	0%	0%
Conventions	1%	1%	2%	4%	3%	2%
Other business	2%	7%	4%	0%	4%	11%

Visitor Activities

The tourist data provides figures for what activities visitors are engaged in. Once again, given the smaller sample sizes, the average figure for several years has been provided. The span 2007 to 2011 includes the responses to the revised survey, as this question had not changed. There is a discrepancy in the data for 2006 so it has been dropped from the analysis.

In addition, the number of responses compared to the total number of visits varies considerably. This figure is also reported as the response rate. Visitors may identify more than one activity minimizing the accuracy of the "response rate". The calculation does indicate the degree to which activities are either engaged in or reported on. The figure is a percentage of all person-visits, not a percentage of all those reporting an activity.

TABLE 5 Visitor activities, average distribution for 2007-2011, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane

	Nipissing	Manitoulin	Greater Sudbury	Sudbury	Timiskaming	Cochrane
RESPONSE RATE	85%	118%	47%	74%	62%	40%
Festivals/Fairs	2%	5%	2%	1%	3%	1%
Cultural Performances	3%	7%	4%	2%	2%	1%
Museums/Art Galleries	8%	10%	5%	5%	6%	2%
Zoos/Aquariums/ Botanical Gardens	1%	2%	1%	1%	0%	1%
Sports Events	2%	1%	4%	2%	5%	3%
Casinos	1%	1%	3%	1%	1%	0%
Theme Parks	2%	2%	1%	1%	0%	1%
National/Provincial Nature Parks	17%	20%	4%	10%	5%	3%
Historic Sites	7%	14%	4%	4%	5%	2%
Any Outdoor/Sports Activity	43%	57%	19%	47%	34%	26%
Boating	22%	30%	6%	27%	13%	6%
Golfing	2%	4%	1%	5%	1%	2%
Fishing	17%	23%	7%	30%	19%	7%
Hunting	1%	3%	1%	3%	2%	4%
Downhill Skiing/ Snowboarding	2%	1%	1%	2%	5%	1%

In almost every instance, outdoor activities account for the largest proportion of activities, except in the case of Greater Sudbury. Manitoulin reports a very high proportion of activities, suggesting multiple activities on the part of visitors. As well, even with the high degree of outdoor activity, Manitoulin also has high proportions of visitors engaged in visiting historic sites and museums/art galleries, followed closely by Nipissing.

Visitor Accommodations

Accommodations are used by visitors who stay one night or longer. As such, it is important to assess the proportion of visitors staying overnight and the duration of their stay. There is incongruent data between the 2006-10 figures and the 2011 survey results, resulting in the presentation of both.

TABLE 6 Percentage of all visits that stay overnight and average nights of overnight visits, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming, Cochrane and Ontario, average of 2006-2010, and 2011

	Percent of visits that are overnight		Average nights of overnight visits	
	2006-10	2011	2006-10	2011
Nipissing	61%	60%	3.3	2.6
Manitoulin	67%	77%	4.2	3.9
Greater Sudbury	60%	50%	2.8	2.9
Sudbury	52%	53%	3.6	3.8
Timiskaming	71%	72%	3.2	3.0
Cochrane	39%	38%	3.5	3.5
Ontario	42%	35%	3.1	2.9

Compared to the Ontario average, there is a considerably higher proportion of person-visits that overnight in these districts, except for the case of Cochrane. Timiskaming and Manitoulin in particular have very high proportions of overnight visitors.

Those visitors who stay overnight also stay slightly longer than the figure for the Ontario average, with Greater Sudbury figures coming in at the low end, while Manitoulin in particular experiences considerably longer stays.

In most cases, the variations between the 2006-10 and 2011 figures are not ideal. However, the 2006-10 numbers may be more accurate because they represent the average of five years and would smooth out sampling variations.

The data for what kind of accommodations are used will also be presented for 2006-10 and 2011 separately.

TABLE 7a Percentage of overnight stays by accommodation type by overnight visitors, Nipissing, Parry Sound and Ontario, average for 2006-2010, and 2011

	NIPISSING		MANITOULIN		GREATER SUDBURY	
	2006/10	2011	2006/10	2011	2006/10	2011
Hotels	8%	11%	2%	3%	15%	13%
Motels	3%	3%	6%	17%	5%	4%
Commercial cottage/cabins	13%	5%	11%	9%	1%	0%
Camping/RV facilities	20%	24%	17%	15%	4%	5%
Private homes	28%	36%	25%	25%	60%	66%
Private cottages	20%	18%	28%	25%	9%	6%

	SUDBURY		TIMISKAMING		COCHRANE	
	2006/10	2011	2006/10	2011	2006/10	2011
Hotels	8%	11%	2%	3%	15%	13%
Motels	3%	3%	6%	17%	5%	4%
Commercial cottage/cabins	13%	5%	11%	9%	1%	0%
Camping/RV facilities	20%	24%	17%	15%	4%	5%
Private homes	28%	36%	25%	25%	60%	66%
Private cottages	20%	18%	28%	25%	9%	6%

There are significant differences between the choices of accommodations among overnight visitors within the different areas. Greater Sudbury, Timiskaming and Cochrane Districts have approximately half if their overnight visits staying in private homes, while Nipissing, Manitoulin and Sudbury Districts, have approximately one quarter.

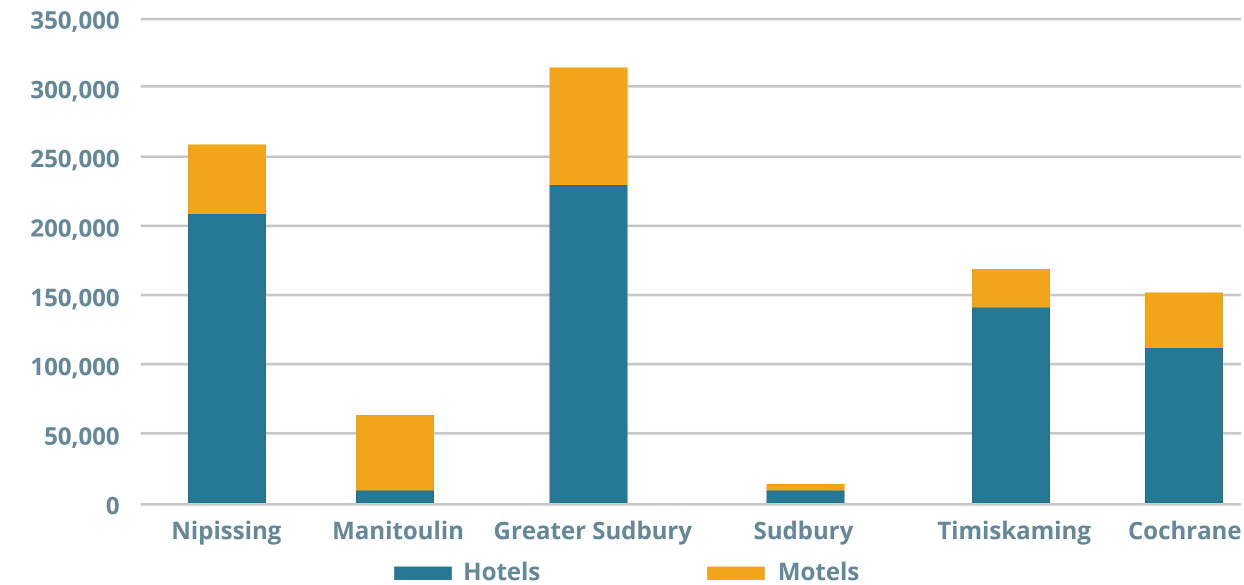
Sudbury, Manitoulin and Nipissing Districts have slightly higher proportions of overnight visitors staying in private cottages.

Nipissing and Manitoulin have higher proportions of overnight visits using camping or RV facilities. Commercial cottages are also prominent in Sudbury, Nipissing and Manitoulin Districts.

Greater Sudbury, Nipissing, Cochrane and Timiskaming Districts experience higher use of hotels. It is harder to draw conclusions about the reliance on motels, given the discrepancy in the figures between 2006-2010 and 2011 for both Manitoulin and Timiskaming Districts.

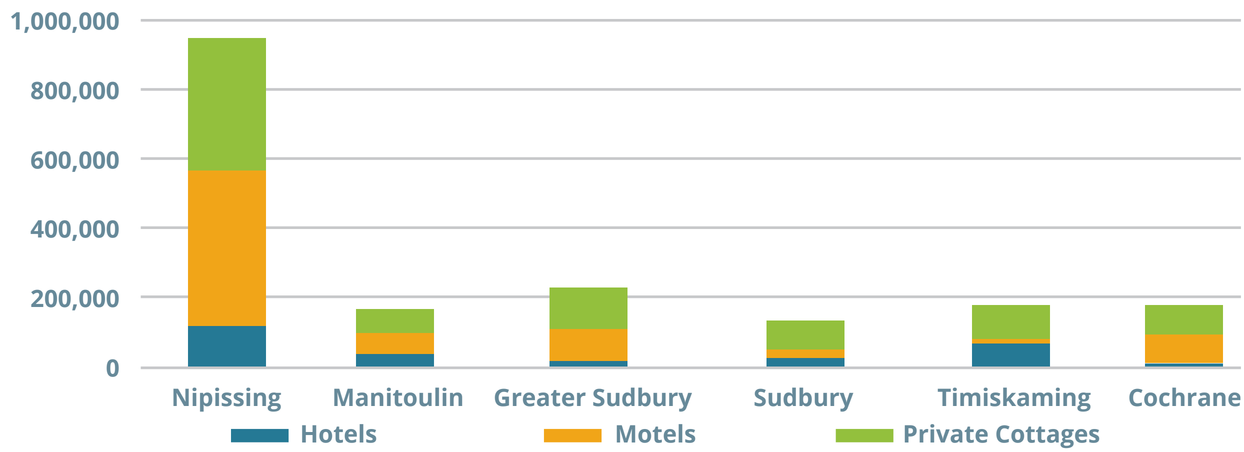
Comparing the actual number of overnight stays by accommodation type provides a sense of the scale of the types of different accommodations.

CHART 10 Number of overnight stays by hotels and motels by overnight visitors, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane, 2011



In terms of actual overnight stays, Greater Sudbury leads in both categories for the number of overnights in hotels or motels. Nipissing is a strong second in the hotel category, while Manitoulin just edges Nipissing out for second place in the motel category .

CHART 11 Number of overnight stays by commercial cottages and cabins, campgrounds and RV facilities, and private cottages by overnight visitors, Nipissing, Manitoulin, Greater Sudbury, Sudbury, Timiskaming and Cochrane, 2011



There are a few observations related to Chart 10 and Chart 11. Chart 11 has a much larger scale of numbers with the left vertical axis reaching 1,000,000 overnight visits. This compares to Chart 10 where the highest figure is slightly over 300,000. Furthermore, Nipissing out paces all of the other areas, often by a factor of five times. Nipissing's overnight stays in camping and RV facilities is about five times that for the next largest entries, being Greater Sudbury and Cochrane.

SUMMARY FOR TOURISM ACTIVITY

- Nipissing has the highest number of person-visits per year, followed closely by Greater Sudbury (each has approximately 1.3 million); Cochrane is receiving a growing number of person-visits (climbing to 1,000,000), while Manitoulin, Sudbury and Timiskaming receive between 300-400,000.

- In comparison to the resident population, Manitoulin experiences the largest weight of visits, with 25 person-visits per resident; Sudbury and Nipissing also have a high ratio, 18:1 and 14:1; Timiskaming, Greater Sudbury and Cochrane have rations between 6:1 and 8:1.

- Manitoulin has by far the greatest degree of seasonality to its person-visit profile, with the number of visitors in Quarter 3 being over twice as high as the average for all quarters. Timiskaming, Nipissing and Sudbury also have a high degree of seasonality; Greater Sudbury has very limited seasonality, with only Quarter 1 falling off the average somewhat.

- In most instances, the surrounding area is the largest source for person-visits to any given district; Cochrane is unique in the extent to which its visitors are its own residents 73%.

- In all areas profiled, personal reasons are the purpose of the vast majority of visits; Greater Sudbury and Cochrane experience more visits for business than the other areas (in 2011, 13% and 16% respectively – the Ontario figure in 2011 was 11%.

- In almost every area, outdoor activities account for the largest proportion of visitor activities, except in the case of Greater Sudbury.

- Compared to the Ontario average, there is a considerably higher proportion of person-visits that overnight in these areas, except for the case of Cochrane. Timiskaming and Manitoulin in particular have very high proportions of overnight visitors.

- Those visitors who stay overnight also stay slightly longer than the figure for the Ontario average, with Greater Sudbury figures coming in at the low end, while Manitoulin in particular experiences considerably longer stays.

- Greater Sudbury, Timiskaming and Cochrane have approximately half of their overnight visits staying in private homes.

- Sudbury, Manitoulin and Nipissing have slightly higher proportions of overnight visitors staying in private cottages, compared to the other areas.

- Nipissing and Manitoulin have higher proportions of overnight visits using camping or RV facilities. Commercial cottages are also prominent in Sudbury, Nipissing and Manitoulin.

- In terms of absolute numbers, Greater Sudbury leads in the number of overnights in hotels or motels, with Nipissing a strong second in the hotel category, while Manitoulin just edges Nipissing out for second place in the motel category.

- Nipissing leads in the number of overnight stays in camping and RV facilities and in private cottages.

TOURISM ESTABLISHMENTS

Services for tourists, from accommodation to food services to recreational activities, are provided by tourism establishments, businesses and organizations that operate primarily in the accommodation, food, and arts, entertainment and recreation sectors. While the services these establishments provide are used by tourists and residents alike, one can assume that more tourists visiting an area result in more such establishments.

The number of these establishments is tracked via Statistics Canada's Canadian Business Patterns data, which counts all business establishments twice a year (in June and December).[4] This section will list the number of these establishments in the following industry sub sectors:

- 711 Performing Arts, Spectator Sports and Related Industries
- 712 Heritage Institutions
- 713 Amusement, Gambling and Recreation Industries
- 721 Accommodation Services
- 722 Food Services and Drinking Places

They will also be cataloged by size of establishment, as follows:

- No employees (usually a one person operation, or where the other staff are unpaid family members)
- 1-4 employees
- 5-19 employees
- 20-99 employees
- 100 or more employees

TABLE 8a Number of establishments in tourism sector, Nipissing, June 2013

	0	1-4	5-19	20-99	100+	TOTAL
Performing Arts, Spectator Sports	10	6	2	1	0	19
Heritage Institutions	1	3	5	0	0	9
Amusement, Recreation Industries	20	9	12	8	1	50
Accommodation Services	60	35	18	10	1	124
Food Services and Drinking Places	36	28	89	37	0	190

TABLE 8b Number of establishments in tourism sector, Manitoulin, June 2013

	0	1-4	5-19	20-99	100+	TOTAL
Performing Arts, Spectator Sports	3	0	0	1	0	4
Heritage Institutions	0	1	0	0	0	1
Amusement, Recreation Industries	7	4	4	0	0	15
Accommodation Services	34	17	7	1	0	59
Food Services and Drinking Places	9	6	19	0	0	34

[4] This figure does undercount the number of establishments, notably in the case of the self-employed. The Statistics Canada's Canadian Business Patterns database does not include unincorporated businesses that are owner-operated (have no payroll employees) and that earn less than $30,000 in a given year. This would likely mean undercounting in a category such as bed & breakfast operators.

TABLE 8c Number of establishments in tourism sector, Greater Sudbury, June 2013

	0	1-4	5-19	20-99	100+	TOTAL
Performing Arts, Spectator Sports	28	9	6	0	2	45
Heritage Institutions	1	1	3	0	1	6
Amusement, Recreation Industries	29	20	29	12	0	90
Accommodation Services	31	18	20	11	2	82
Food Services and Drinking Places	55	48	141	97	2	343

TABLE 8d Number of establishments in tourism sector, Sudbury, June 2013

	0	1-4	5-19	20-99	100+	TOTAL
Performing Arts, Spectator Sports	4	0	0	0	0	4
Heritage Institutions	0	0	1	0	0	1
Amusement, Recreation Industries	8	12	2	0	0	22
Accommodation Services	67	27	19	4	0	117
Food Services and Drinking Places	12	15	13	6	0	46

TABLE 8e Number of establishments in tourism sector, Timiskaming, June 2013

	0	1-4	5-19	20-99	100+	TOTAL
Performing Arts, Spectator Sports	2	3	0	0	0	5
Heritage Institutions	1	4	2	0	0	7
Amusement, Recreation Industries	9	6	7	1	0	23
Accommodation Services	25	12	9	1	0	47
Food Services and Drinking Places	15	22	33	9	1	80

TABLE 8f Number of establishments in tourism sector, Cochrane, June 2013

	0	1-4	5-19	20-99	100+	TOTAL
Performing Arts, Spectator Sports	8	0	1	0	0	9
Heritage Institutions	1	1	0	0	0	2
Amusement, Recreation Industries	17	15	14	5	0	51
Accommodation Services	37	17	21	11	0	86
Food Services and Drinking Places	32	35	84	30	3	184

Some observations drawn from Tables 8a to 8f:

- Greater Sudbury has by far the largest number of establishments (556), followed by Nipissing (392) and Cochrane (332).
- Taking the area as a whole, almost a third of establishments (32%) have no employees; this is actually lower than the average for all industries, which would be closer to half.
- 21% of all tourism establishments across the area have 1-4 employees, and another third (32%) have 5-19 employees.
- There are 245 establishments with 20-99 employees, and 13 with 100 or more employees;
- In most instances, the industry sub sector with the largest number of establishments is Food services and drinking places, followed by Accommodation services; this pattern is reversed in Manitoulin and Sudbury District.
- Food services and drinking places establishments make up exactly half of all tourism establishments across the area, with Accommodation services accounting for nearly a third (29%); Amusement, gambling and recreation industries make up another 14%, followed by Performing arts, spectator sports and related industries (5%) and Heritage institutions (2%).

TOURISM WORKFORCE

The workforce data relies on a single source, the National Household Survey that accompanied the 2011 Census. This is the voluntary survey which replaced the previous mandatory long-form questionnaire, and concerns have been raised regarding both the accuracy of the data and the degree its results can be compared to the 2006. In particular, the worry is the degree to which this data represents marginalized groups, who tend to have smaller response rates to surveys. Thus, when it comes to low income individuals or individuals from certain demographic categories (e.g. Aboriginal peoples), their participation may be under-represented. It would also mean that occupations or industries where these individuals are employed in greater proportions might be under-represented in the data.

The following tables present the data for the actual jobs that exist in the areas under study. These are jobs that are physically present in each location (as opposed to the jobs that residents are employed in, which could be in another district), and also represent jobs that have a fixed place of work, rather than jobs where the worker moves from place to place (e.g. construction labourer).

The tables also cross-tabulate the data by the main tourism industries and the most prominent tourism occupations. The first column shows the total number of jobs in each occupation for all industries, and the second to last column shows the total number of those tourism occupations which are found in tourism industry jobs.

With smaller data sets (that is, where there is a smaller workforce), when the data gets sliced and diced by occupation and by industry, the result can be a rather small number. Statistics Canada rounds off the number in a cell so that the last digit ends in a “0” or “5”, however, for figures less than 10, it rounds it off to a “0” or “10,” in a partly random fashion. The result, then, is that where there are many low value figures (say, many entries between “1” and “9,” there is a good chance that many of the result will end up being “0”. Thus, in a smaller community such as Manitoulin, there may be far more “0” entries, resulting in a smaller overall figure than is actually the case. These tables need to read with this caution in mind.

Jobs by industry and occupation. The first table presents the data for Ontario as a whole, which provides a benchmark for what the overall distribution of tourism occupations across the tourism industry sectors looks like. Due to the large numbers involved, the font has been reduced and some of the occupation titles have been abbreviated.

From Table 9, one can see that food counter attendants (food counter workers) account for approximately 20% of all tourism sector jobs in Ontario and food and beverage servers make up another 11%. Cooks account for approximately 10% all these jobs, and restaurant managers make up a further 8%.

TABLE 9 Jobs in tourism industries and occupations, Ontario, 2011

	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	**5632235**	**32875**	**8785**	**73830**	**46590**	**4165**	**131535**	**144890**	**9065**	**451735**	
Restaurant managers	43880	105	35	440	795	0	16700	17950	1105	37130	8.2%
Accommodation mgrs	6085	0	55	185	3940	735	70	0	0	4985	1.1%
Professionals art/cult	65245	12630	700	170	25	0	35	15	90	13665	3.0%
Program instructors	28320	480	60	12130	335	875	0	35	0	13915	3.1%
Food supervisors	13540	60	0	250	310	20	2360	7940	75	11015	2.4%
Chefs	20810	95	0	930	1670	0	10880	1740	225	15540	3.4%
Cooks	56645	105	85	1690	1990	80	23090	15660	740	43440	9.6%
Hosts/hostesses	7830	55	0	95	290	0	6830	30	100	7400	1.6%
Bartenders	12340	150	0	900	780	0	5775	300	3130	11035	2.4%
Food/beverage servers	55625	395	30	3075	3715	0	41205	380	1630	50430	11.2%
Hotel front desk clerks	6395	0	0	0	6370	0	0	0	0	6370	1.4%
Cashiers	107995	620	190	1900	175	10	1725	18535	65	23220	5.1%
Food counter workers	119885	285	140	1600	1715	85	17815	68930	650	91220	20.2%
Light duty cleaners	56540	215	105	1740	10785	175	410	915	100	14445	3.2%
Janitors and caretakers	62630	210	225	1230	1845	135	220	460	55	4380	1.0%
Landscaping labourers	23015	110	365	5540	95	415	0	0	0	6525	1.4%

***The comparable tables for the area district follows. Recall that on account of rounding (as well data suppression due to poorer quality) and concern that the National Household Survey may not quite capture all the data accurately, there may be some anomalous results. Overall the general distribution of jobs fits the provincial pattern. In particular, the figures for Manitoulin District need to be taken with caution. With its smaller population and smaller workforce, it is likely that a number of categories do have employees in them, but due to the rounding rules that StatCan uses, these have been rounded down to zero.

TABLE 10 Jobs in tourism industries and occupations, Nipissing, 2011

	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	**4435**	**30**	**25**	**50**	**55**	**0**	**175**	**45**	**0**	**380**	
Restaurant managers	35	0	0	0	0	0	25	0	0	25	6.6%
Accommodation mgrs	10	0	0	0	0	0	0	0	0	0	0.0%
Professionals art/culture	35	10	0	0	0	0	0	0	0	10	2.6%
Program instructors	10	0	0	0	0	0	0	0	0	0	0.0%
Food service supervisors	0	0	0	0	0	0	0	0	0	0	0.0%
Chefs	55	0	0	0	0	0	50	0	0	50	13.2%
Cooks	60	0	0	0	10	0	20	0	0	30	7.9%
Hosts/hostesses	0	0	0	0	0	0	0	0	0	0	0.0%
Bartenders	0	0	0	0	0	0	0	0	0	0	0.0%
Food & beverage servers	50	0	0	10	0	0	25	0	0	35	9.2%
Hotel front desk clerks	0	0	0	0	0	0	0	0	0	0	0.0%
Cashiers	125	0	0	0	0	0	0	0	0	0	0.0%
Food counter attendants	90	0	0	0	0	0	30	20	0	50	13.2%
Light duty cleaners	50	0	0	0	10	0	0	0	0	10	2.6%
Janitors and caretakers	165	0	0	0	0	0	0	0	0	0	0.0%
Landscaping labourers	25	0	0	0	0	0	0	0	0	0	0.0%

TABLE 11 Jobs in tourism industries and occupations, Manitoulin, 2011

	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	**4435**	**30**	**25**	**50**	**55**	**0**	**175**	**45**	**0**	**380**	
Restaurant managers	35	0	0	0	0	0	25	0	0	25	6.6%
Accommodation mgrs	10	0	0	0	0	0	0	0	0	0	0.0%
Professionals art/culture	35	10	0	0	0	0	0	0	0	10	2.6%
Program instructors	10	0	0	0	0	0	0	0	0	0	0.0%
Food service supervisors	0	0	0	0	0	0	0	0	0	0	0.0%
Chefs	55	0	0	0	0	0	50	0	0	50	13.2%
Cooks	60	0	0	0	10	0	20	0	0	30	7.9%
Hosts/hostesses	0	0	0	0	0	0	0	0	0	0	0.0%
Bartenders	0	0	0	0	0	0	0	0	0	0	0.0%
Food & beverage servers	50	0	0	10	0	0	25	0	0	35	9.2%
Hotel front desk clerks	0	0	0	0	0	0	0	0	0	0	0.0%
Cashiers	125	0	0	0	0	0	0	0	0	0	0.0%
Food counter attendants	90	0	0	0	0	0	30	20	0	50	13.2%
Light duty cleaners	50	0	0	0	10	0	0	0	0	10	2.6%
Janitors and caretakers	165	0	0	0	0	0	0	0	0	0	0.0%
Landscaping labourers	25	0	0	0	0	0	0	0	0	0	0.0%

TABLE 12 Jobs in tourism industries and occupations, Greater Sudbury, 2011

	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	69035	170	240	795	615	0	1655	2140	20	5635	
Restaurant managers	545	0	0	0	0	0	245	205	0	450	8.0%
Accommodation mgrs	105	0	0	0	90	0	0	0	0	90	1.6%
Professionals art/culture	490	45	0	0	0	0	0	0	0	45	0.8%
Program instructors	340	0	0	210	0	0	0	0	0	210	3.7%
Food service supervisors	200	0	0	0	0	0	55	105	0	160	2.8%
Chefs	130	0	0	0	0	0	80	0	0	80	1.4%
Cooks	1060	0	0	25	60	0	325	345	0	755	13.4%
Hosts/hostesses	105	0	0	0	0	0	100	0	0	100	1.8%
Bartenders	80	0	0	0	0	0	50	0	0	50	0.9%
Food & beverage servers	540	0	0	15	20	0	465	0	0	500	8.9%
Hotel front desk clerks	85	0	0	0	90	0	0	0	0	90	1.6%
Cashiers	1565	0	0	0	0	0	85	195	0	280	5.0%
Food counter attendants	1840	0	0	0	40	0	205	1090	0	1335	23.7%
Light duty cleaners	510	0	0	15	95	0	0	0	0	110	2.0%
Janitors and caretakers	895	0	0	20	45	0	0	0	0	65	1.2%
Landscaping labourers	115	0	0	45	0	0	0	0	0	45	0.8%

TABLE 13 Jobs in tourism industries and occupations, Sudbury, 2011

	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	6515	0	0	35	110	10	85	185	0	425	
Restaurant managers	50	0	0	0	0	0	0	35	0	35	8.2%
Accommodation mgrs	30	0	0	0	20	0	0	0	0	20	4.7%
Professionals art/culture	45	0	0	0	0	0	0	0	0	0	0.0%
Program instructors	0	0	0	0	0	0	0	0	0	0	0.0%
Food service supervisors	15	0	0	0	0	0	0	15	0	15	3.5%
Chefs	0	0	0	0	0	0	0	0	0	0	0.0%
Cooks	65	0	0	0	0	0	10	0	0	10	2.4%
Hosts/hostesses	0	0	0	0	0	0	0	0	0	0	0.0%
Bartenders	0	0	0	0	0	0	0	0	0	0	0.0%
Food & beverage servers	75	0	0	0	0	0	50	0	0	50	11.8%
Hotel front desk clerks	0	0	0	0	0	0	0	0	0	0	0.0%
Cashiers	325	0	0	0	0	0	0	35	0	35	8.2%
Food counter attendants	100	0	0	0	0	0	10	85	0	95	22.4%
Light duty cleaners	95	0	0	0	20	0	0	0	0	20	4.7%
Janitors and caretakers	90	0	0	0	0	0	0	0	0	0	0.0%
Landscaping labourers	25	0	0	0	0	0	0	0	0	0	0.0%

TABLE 14 Jobs in tourism industries and occupations, Timiskaming, 2011

ALL OCCUPATIONS	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	12550	20	0	50	75	40	300	250	0	735	
Restaurant managers	70	0	0	0	0	0	25	45	0	70	9.5%
Accommodation mgrs	30	0	0	0	0	25	0	0	0	25	3.4%
Professionals art/culture	55	0	0	0	0	0	0	0	0	0	0.0%
Program instructors	95	0	0	15	0	0	0	0	0	15	2.0%
Food service supervisors	0	0	0	0	0	0	0	0	0	0	0.0%
Chefs	0	0	0	0	0	0	0	0	0	0	0.0%
Cooks	180	0	0	0	0	0	90	20	0	110	15.0%
Hosts/hostesses	0	0	0	0	0	0	0	0	0	0	0.0%
Bartenders	0	0	0	0	0	0	0	0	0	0	0.0%
Food & beverage servers	150	0	0	0	0	0	145	0	0	145	19.7%
Hotel front desk clerks	60	0	0	0	60	0	0	0	0	60	8.2%
Cashiers	415	0	0	0	0	0	0	0	0	0	0.0%
Food counter attendants	310	0	0	0	0	0	40	160	0	200	27.2%
Light duty cleaners	75	0	0	0	0	0	0	0	0	0	0.0%
Janitors and caretakers	225	0	0	0	0	0	0	0	0	0	0.0%
Landscaping labourers	40	0	0	0	0	0	0	0	0	0	0.0%

TABLE 15 Jobs in tourism industries and occupations, Cochrane, 2011

ALL OCCUPATIONS	TOTAL IN ALL INDUSTRIES	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places	Total key tourism occupations	% of occupation in all tourism
ALL OCCUPATIONS	33125	35	10	210	415	40	615	940	25	2290	
Restaurant managers	265	0	0	0	0	0	100	105	0	205	9.0%
Accommodation mgrs	40	0	0	0	25	0	0	0	0	25	1.1%
Professionals art/culture	105	10	0	0	0	0	0	0	0	10	0.4%
Program instructors	195	0	0	45	0	0	0	0	0	45	2.0%
Food service supervisors	115	0	0	0	0	0	0	90	0	90	3.9%
Chefs	25	0	0	0	0	0	0	0	0	0	0.0%
Cooks	350	0	0	0	40	0	115	100	0	255	11.1%
Hosts/hostesses	60	0	0	0	0	0	60	0	0	60	2.6%
Bartenders	55	0	0	0	0	0	0	0	0	0	0.0%
Food & beverage servers	205	0	0	0	0	0	170	0	0	170	7.4%
Hotel front desk clerks	115	0	0	0	115	0	0	0	0	115	5.0%
Cashiers	740	0	0	0	0	0	0	75	0	75	3.3%
Food counter attendants	785	0	0	0	0	0	105	510	0	615	26.9%
Light duty cleaners	460	0	0	0	150	0	0	0	0	150	6.6%
Janitors and caretakers	565	0	0	0	0	0	0	0	0	0	0.0%
Landscaping labourers	115	0	0	15	0	0	0	0	0	15	0.7%

Overall, the same patterns hold as for Ontario as a whole:

- Food counter attendants are almost always the largest single occupational category, usually making up over 20% of the tourism workforce (the exceptions are Manitoulin and Nipissing)
- Restaurant managers, food and beverage servers, as well as cooks, also rank among the top occupations, just as in Ontario

Totaling the tourism jobs and calculating their share as a percent of all jobs for each area shows that, in comparison to the Ontario average, tourism makes up a slightly larger proportion of jobs in Manitoulin and Nipissing, and a slightly lower proportion of jobs in Cochrane, Sudbury and Timiskaming, while the tourism percentage of the workforce in Greater Sudbury is about the same as the provincial average (Table 16).

TABLE 16 Percentage of all jobs (with fixed place of work) in tourism sector, 2011

Nipissing	Manitoulin	Greater Sudbury	Sudbury	Timiskaming	Cochrane	Ontario
8.5%	8.6%	8.2%	6.5%	5.9%	6.9%	8.0%

TABLE 17 Percentage distribution of tourism employment by tourism subsectors, 2011

	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveler accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places
ONTARIO	7%	2%	16%	10%	1%	29%	32%	2%
Nipissing	3%	4%	10%	15%	2%	22%	41%	3%
Manitoulin	8%	7%	13%	15%	0%	46%	12%	0%
Greater Sudbury	3%	4%	14%	11%	0%	29%	38%	0%
Sudbury	0%	0%	8%	26%	2%	20%	44%	0%
Timiskaming	3%	0%	7%	10%	5%	41%	34%	0%
Cochrane	2%	0%	9%	18%	2%	27%	41%	1%

Given the high proportion of jobs in the food counter attendant occupation, it should not be surprising to find that limited-service restaurants (fast food restaurants) usually make up 30-40% of all tourism employment in the area, except for Manitoulin, where full-service restaurants are far more prominent. Timiskaming also has employment in full-service restaurants exceeding that for limited-service restaurants. The study area has a slightly higher proportion of jobs in the traveler accommodation sector, compared to the Ontario average, and fewer in the amusement, gambling and recreation industries. The performing arts, spectator sports and related industries, as well as heritage institutions, also make up a smaller share of the tourism sector across this area, except for Manitoulin District.

Occupations by age. The data that describes the breakdown by age for tourism occupations is limited. Once one narrows the labour force data to a specific district and occupation, dissecting it further by age creates small numerical values for each age category, resulting in many cells sowing up as “0” because of the rounding rule.

TABLE 18 Percentage of youth aged 15 to 24 years of age employed in select tourism occupations

	ONTARIO	NIPISSING	MANITOULIN	GREATER SUDBURY	SUDBURY	TIMISKAMING	COCHRANE
ALL OCCUPATIONS	13%	14%	11%	15%	11%	13%	13%
Program instructors	53%	53%	75%	55%	---	42%	60%
Food service supervisors	38%	40%	---	25%	---	---	---
Cooks	35%	34%	14%	36%	---	24%	21%
Hosts/hostesses	81%	100%	---	60%	---	---	100%
Bartenders	31%	46%	---	36%	---	---	---
Food & beverage servers	46%	45%	43%	60%	30%	---	42%
Hotel front desk clerks	27%	47%	---	50%	---	---	28%
Cashiers	53%	44%	54%	55%	35%	44%	51%
Food counter attendants	55%	55%	65%	61%	33%	49%	42%
Light duty cleaners	11%	20%	17%	20%	---	15%	15%
Landscaping labourers	41%	45%	40%	38%	---	54%	35%

Youth aged 15-24 years of age tend to make up 11-15% of the employed workforce generally, but among certain tourism occupations, they account for 40-60% of the workforce, and in the case of hosts and hostesses, a full 81% of all workers in that occupation in Ontario. Table 18 shows the figures for each district, where in most instances, the percentage of youth either equals or exceeds the provincial average. While the position of light duty cleaner has a smaller proportion of youth provincially, it has been included in this list because in this area, up to 20% of those working as light duty cleaners can be youth (Nipissing).

A NEED FOR A LABOUR MARKET INITIATIVE (LMI)

Skills and labour force shortages are among the most significant challenges facing the Canadian economy in the near future.[5] With the resource sector boom driving demand for workers, modest migrant numbers and the pace of retirement rising, constraints in the labour market are becoming increasingly apparent. Not only does this limit the economy's productive capacity, it also generates other undesirable trends such as higher inflation. Within the tourism sector specifically, labour and skills challenges have long been identified as a concern and, moreover, as a factor impacting the industry's performance. According to Discover Ontario, the Sorbara Report, labour is a critical factor to the success and vitality of the industry within Ontario. As such, Workforce Development and Industry Training emerged as one of the four pillars critical to tourism throughout Ontario. Labour shortages are expected to be the most significant in the province's food and beverage services sector, as shortages could rise to more than 50,200 full-time jobs by 2025. Similarly, the accommodation sector is projected to experience a shortage of 2,080 jobs by 2025; transportation a shortage of 7,010 jobs; recreation and entertainment a shortage of 10,660 jobs.[6]

In 2010, the Tourism industry accounted for 1.6 million jobs in Ontario, representing 9.2% of the 17.4 million jobs in Canada.[7] As it is considered a key employment sector for Northern Ontario, it is essential to have workforce strategies in place to ensure sustainable growth for the industry. Due to ongoing retirements in the baby boomer cohort and increased demand for employment in the resource sector, the number of job vacancies in tourism continues to increase. Population rates are on the decline and as a result the workforce is gradually decreasing in size. In addition, a generational shift in skill-sets, behaviour and psychographic attributes, impacts employers' ability to find employees who can fulfill position expectations. As a result, tourism employers are finding difficulties recruiting and attracting qualified individuals to fill the increasing number of vacancies.[8] Moreover, in Northern Ontario where aging populations and youth out-migration continues to be a concern, the number of employable individuals weakens. With lower paying jobs compared to mining and forestry sectors, Northern Ontario's qualified workforce often overlook the tourism sector or use it as a stepping-stone before moving on to higher paying positions in a different industry.

With a thorough understanding of the national and global labour market challenges, LMG, TNO and regional partners identified a gap in intelligence at a regional level. Information in relation to the nature, extent and cause of the labour force issues in Northern Ontario's tourism sector was limited. As such, a need was identified to develop detailed and comparable regional tourism labour force data with a focus on recruitment, retention and skills dimensions. The goal of the LMI is to assess and understand the key challenges and priority areas, identify actions to enhance the labour market and determine the future outlook and themes now and into the future.

In efforts to understand the tourism industry's labour market needs, a research study was needed. The data collected during this process provides insight and clarity into the key issues and challenges with respect to labour and skills. The analysis of the data collected plays an integral role in the formation of a regional tourism strategy to guide the industry.

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[5] 2012 Canadian Chamber of Commerce "Top 10 Barriers to Competitiveness" report Ontario Tourism Education
[6] Council, Ontario Tourism Workforce Development Strategy 2012-2017, p. 10
[7] http://www.statcan.gc.ca/daily-quotidien/110610/dq110610e-eng.htm
[8] Update to the Future of Canada's Tourism Sector Report (CTHRC and Conference Board of Canada, 2012)

WHO IS THE LMI FOR?

The LMI is intended to be a useful tool for a range of stakeholders who can lead the growth of the industry's labour market in Northeastern Ontario. By working in partnership to implement the recommended actions, the best results can be achieved.

A team effort is essential for the implementation of the themes and actions presented. Working collaboratively, the following partnering organizations are integral to the success of the outcomes.

- The Labour Market Group, Co-lead
- Tourism Northern Ontario, Co-lead
- Northeastern Ontario Tourism, Supporting partner
- Workforce Planning for Sudbury & Manitoulin, Supporting partner
- Far Northeast Training Board, Supporting partner
- FedNor, Supporting partner
- Ministry of Tourism, Culture & Sport, Supporting partner

In addition to the sub-regional research studies, a customized database and Implementation Plan has been developed to serve as tools during the planning process. The database allows partners to run queries based on the survey results collected during the research phase of this initiative. Future surveys can be seamlessly imported in the tool, allowing for an effective method to analyze and compare future data. The login details to use the tool reside with LMG and TNO, lead partners for the project. The Implementation Plan categorizes the recommendations and identifies sub-regional and pan-Northern initiatives that may be considered as priority projects.

4. THE LABOUR MARKET INITIATIVE (LMI)

A Northern-wide commitment to strengthen the labour market within the tourism industry will enhance relationships between industry and regional partners.

OVERVIEW

A thorough understanding of the current labour market is essential to planning for future tourism-related workforce needs. The LMI consisted of analyzing secondary data and obtaining primary market research through surveys and one-on-one interviews to highlight the needed direction and potential partnerships needed to strengthen workforce planning in Northeastern Ontario.

PURPOSE

The purpose of the Northeastern Ontario LMI is to:

- Analyze the current landscape affecting the regional tourism industry;
- Identify current and future regional labour force challenges;
- Recognize themes that are occurring and impacting the sector's labour force sustainability; and
- Identify actions that can be implemented to support balanced growth.

OBJECTIVES

The aim of this study was to develop a greater understanding of the existing and anticipated labour force deficiencies and challenges across the tourism industry. The results may be used by LMG, TNO and supporting partners to identify tourism labour force priorities, in terms of both occupations and skills.

In pursuit of this overarching objective, four interrelated streams of analysis were conducted:

1. A desktop review of the existing data, research and analysis relating to the tourism labour force was undertaken to develop an understanding of the current stock of knowledge and to identify issues to be tested in the industry survey.

2. A regional survey of tourism employers was conducted to garner information in relation to the nature and severity of current labour and skills shortages and to explore options for redressing these issues.

3. Consultations with key informants and representatives of industry groups representing a diverse spectrum of the six districts was undertaken to collect anecdotal evidence in relation to perceptions toward labour and skills challenges.

4. Forecasting the demand for tourism workers to estimate future trends and areas where the labour force challenges are likely to become more or less pronounced.

METHODOLOGY

The following provides a summary of the approach and data collected through a regional survey of tourism employers. The overarching approach to this study involved five key tasks:

1. Designing and implementing the Northeastern Ontario Tourism Labour Market Survey;
2. Collating and analyzing the survey data;
3. Modeling and projecting the regional demand for tourism workers;
4. Synthesizing the findings of the analysis, together with other third party sources, to assess the implications for the sector; and
5. Developing recommendations for potential short, medium and long-term strategies to address the challenges identified by the industry.

These tasks lead to the development of the Implementation Plan, which brings together the findings from each analytical dimension and draws the key implications as they relate to regional and occupational priorities.

TASK 1: SURVEY DESIGN AND IMPLEMENTATION

The survey questionnaire was developed to meet key information requirements and reflect on the issues raised during a series of industry consultations. The industry consultations were conducted at various stages of the project and provided relevant insight required to form the questionnaire. Initial questionnaires were prepared and provided to the Labour Market Group for comment and input.

The survey was designed as an online tool through survey monkey. An email invitation to participate in the survey was sent out to over 1,500 tourism employers throughout Northeastern Ontario. To maximize the potential response rate, a printed copy was also mailed directly to over 250 businesses.

TASK 2: PROMOTION OF THE SURVEY

Once the survey was available online, regional stakeholders sent invitation emails to their members and partners. After three weeks, reminder emails were distributed and new requests were sent to those businesses not included in the initial sample.

'Local champions' were recruited to attempt to further engage at a community level and encourage response. Over 140 telephone calls were made in an attempt to elicit greater response and to reiterate the case for participation. The survey was initially open from January to March 2014, however this was extended to June 2014 to allow time for further responses. Throughout the period the survey was promoted through a myriad of forums including conferences, workshops, social media and direct representations from industry leaders. Communities throughout the region were visited to elicit greater response from stakeholders and employers.

Key considerations for future labour market surveys:

1. The questionnaire took too long to complete. While such a wide-scale survey provided an opportunity to canvass views on a broad range of issues at a detailed level, it may have compromised employers' willingness to participate. Those who completed the survey took 16 minutes, on average. Those who skipped questions due to inapplicable responses, took 12 minutes on average.

2. Limitations of Northeastern Ontario Tourism database. The database that was used to approach businesses did not contain complete listings of all tourism businesses, and as a result not all businesses could be contacted. Additionally, many of the businesses contacted did not have employees and fell outside of the pool of interest.

3. During the time frame of the LMI study, a number of additional surveys within the tourism sector were being completed. Survey fatigue in the region meant participation was reduced. Furthermore, multiple surveys being distributed to the same audience within the same time period caused confusion amongst respondents on which survey they had completed.

TASK 3: SURVEY DATA COLLATION AND ANALYSIS

Over the project period, a total of 109 responses were received that demonstrated adequate detail. In order to maximize the geographical interpretive power, data was aggregated based on electoral districts.

The districts included in the analysis are:

Manitoulin
Greater Sudbury
Cochrane
Sudbury
Temiskaming
Nipissing

Sample size threshold for individual questions

Within the districts, not all results could be presented with the required degree of statistical significance. This occurred as not all survey participants were required to complete every question. Questions that did not relate to the respondent were skipped. The intention of the analysis was to investigate a complex mix of the features of regional tourism businesses and their employment experiences. However, the extent to which the data can be explored is constrained by the perceived level of bias and the overall statistical significance of the sample.

The statistical precision of estimates derived from these samples is measured by the implied margin of error or confidence interval along with the confidence level. The key to the validity of any survey is randomness. When sampling, it is critical that respondents be chosen randomly so that the survey results can be generalized to the whole group. How well the sample represents the group is gauged by two important statistics, the survey's margin of error and confidence level. The margin of error is a statistic expressing the amount of random sampling error in a survey's results. Put simply, the larger the margin of error, the less faith can be had that the reported results reflect actual situation. The margin of error indicates how well the respondents represent the entire group. For example, a survey may have a margin of error of plus or minus 3 percent at a 95 percent level of confidence. These terms mean that if the survey were conducted 100 times, the data would be within a certain number of percentage points above or below the percentage reported in 95 of the 100 surveys. The margin of error decreases as the sample size increases, but only to a point. A very small sample, such as 50 respondents, has about a 14 percent margin of error while a sample of 1,000 has a margin of error of 3 percent. The size of the group being surveyed does not matter. For the purpose of this survey the margin of error was calculated at plus or minus (+/-) 8. A 95 percent level of confidence is an industry standard and was utilized. There are three factors that determine the size of the confidence interval for a given confidence level sample size, percentage and population size.

The confidence level tells you how sure you can be. It is expressed as a percentage and represents how often the true percentage of the sample that would pick an answer lies within the confidence interval. A 95% confidence level was used for the purpose of this survey.

Sampling bias

Sampling bias is an important consideration in understanding the limitations of the survey data. In statistical terms, sampling bias is when a sample is collected or reported in such a way that some members of the intended population are less likely to be included than others. There are many ways bias can be present in a given sample of a population – the following is a list of those types of bias that are particularly relevant to the LMI survey:

1. Self-selection bias – this occurs when response to a survey is voluntary. This survey was intended to identify any deficiencies in the tourism labour profile. A participant's decision to participate may be correlated to whether they are currently experiencing labour supply difficulties or deficiencies in their workforce.

2. Small sample bias – a number of cells within a particular cross-sectional array (e.g. a single cell within an array might be the number of participants that reported a minimal degree of difficulty in recruiting due to competitive pressures) may fall close to (or below) the sample size threshold. The bias of the resultant sub-sample is measured by the corresponding margin of error.

5. INDUSTRY TRENDS

Secondary sources were reviewed to compile information related to expected regional labour market issues, including provincial local LMI studies, Provincial & National studies and statistics. The secondary information assisted in summarizing the labour market issues across the Province and in bringing consistency to discussions within the focus group discussions and interviews. The information was also used to identify issues and trends that could be tested in the industry survey.

KEY FINDINGS

The Canadian Tourism Human Resource Council[9] (CTHRC) projects shortages by industry in Canada by 2030 in the following order (from largest shortfall to smallest):

- Recreation and Entertainment
- Food and Beverage Services
- Accommodation Services
- Travel Services (for this industry they forecast a surplus)

The CTHRC forecasts occupation shortfalls as follows:

- Food counter attendants and kitchen helpers
- Food and beverage servers
- Cooks
- Bartenders
- Program leaders/instructors in recreation and sport

According to Ontario Tourism Education Council[10], Ontario's labour shortages are expected to be the most significant in the province's food and beverage services sector, as shortages could rise to more than 50,200 full-time jobs by 2025. Similarly, the accommodation sector is projected to experience a shortage of 2,080 jobs by 2025; transportation a shortage of 7,010 jobs; recreation and entertainment a shortage of 10,660 jobs.

Over 85% of projected job openings will be tied to turnover. From 2011-2015, the Ontario job opening statistics are as follows:

- 86.1% due to turnover
- 9.1% due to expansion
- 4.8% due to attrition

TOURISM OUTLOOK

Global economic conditions have not been favourable for the Canadian tourism industry over recent years. Weak economic performance in key source markets and the strength of the Canadian dollar has continued to impact visitor numbers. Over the last 12 months, the impact of the global financial crisis and, to a lesser extent, the impact of the high Canadian dollar have seen inbound visitation to Canada decline and outbound travel by Canadians accelerate (at the expense of domestic visitation). It is not anticipated that either of these issues will unwind in any significant way in the near term with continued implications for both visitor numbers and per-visitor expenditure.

[9] http://cthrc.ca
[10] Ontario Tourism Education Council, Ontario Tourism Workforce Development Strategy 2012-2017, p. 10

Implications for Strategy Development

In light of the labour and skills issues revealed at the national level, as well as the regional and occupational priorities, the following is a collection of high level observations in relation to future workforce policy and strategy in the tourism sector. The initiatives canvassed are a function of issues explored throughout the survey and modeling process and, therefore do not represent an exhaustive account of the proposals that warrant consideration.

Training

Changes to training provision in key tourism skill areas could help to alleviate skilled labour shortages, in high demand positions such as chefs and line cooks. The likelihood of workers attaining a qualification and being lured to non-tourism industries is likely to remain a threat to the efficacy of training-related strategies in the near term.

Supporting the findings of the survey, "The Future of Canada's Tourism Sector: Shortages to Resurface as Labour Markets Tighten", notes that there are issues with the accessibility of tourism and hospitality training courses, in terms of viability and availability. Further, the study notes that some training programs are not providing individuals with the skills and knowledge that employers require. As such, the findings of the analysis in relation to training and workforce development indicate that consideration should be given to the following issues:

- The number of training facilities and programs available;
- The content of training courses to ensure fit with industry expectations and requirements; and
- The accessibility to training, particularly in rural/remote areas.

Alternative Labour Sources

To varying degrees across the different regions, there is scope to look to alternative labour sources to alleviate shortages in the tourism industry. Alternative labour sources include:

- International workers (skilled migrants, international students and working holiday makers); and
- Non-traditional workers (mature-age workers, Indigenous employees – particularly in the Northern Territory, and workers with a disability).

The availability of international workers as an alternative labour source for tourism businesses is largely dependent upon Canadian immigration policy. In particular, as the conditions relate to the ability of foreigners to move to Canada to work, or to travel to Canada and work while here.

A relatively large proportion of business owners' who indicated in the survey that they were investigating non-traditional sources of labour as a means to address skills shortages noted an interest in using international workers. However, current regulations severely restrict the ability of these businesses to access international workers, and as a result it is a less viable option for the industry than in the recent past.

Opportunities for migrant worker arrangements to be made more conducive to easing the labour and skills pressures facing tourism workers should be considered as a priority. While local demographics ultimately determine the extent to which these sources offer a material response to regional labour force challenges, they are nevertheless a resource which could be more extensively and more effectively utilized to ease labour force pressures.

Improved Coordination

The disparate nature of the tourism industry means that, in a variety of areas, there are significant benefits to increased levels of coordination. The management of the tourism labour force is no exception. The employers that are most effective at managing their labour force are, in general, the larger ones. Not only are they equipped with professional capability and resources, they also operate on a scale that justifies a strategic approach to workforce management. Given the predominance of small business in the tourism sector, there would appear benefit to improved information, support and resourcing in relation to the workforce for both employees and employers.

6. EMPLOYER & KEY INFORMANT ENGAGEMENT

The survey and interview process garnered key information in relation to the nature of the current labour and skills shortages and explored options for addressing these issues. Invitations to complete the survey were sent to over 1,500 businesses and organizations spanning the districts of Nipissing, Temiskaming, Cochrane, Manitoulin, Sudbury and Greater Sudbury.

EMPLOYER SURVEY FINDINGS

The labour market in Northeastern Ontario's tourism sector has been facing a broad range of challenges that require actions to minimize the impact on industry. In order to develop relevant and effective strategies to address this, the current landscape was assessed.

Current Landscape

- Based on the feedback received, the majority of employers anticipate that employment in the sector will grow a little overall in the next 2-5 years.
- In order of significance, the labour force pressures facing the industry were recruitment difficulties, skills deficiencies and retention difficulties.

Recruitment and Retention

The most frequently identified factors for recruitment difficulties include:
- A lack of applicants;
- A lack of required skills; and
- A lack of required experience.

The most frequently identified factors for retention difficulties include:
- A lack of career development opportunities;
- Limited employee capacity, both mentally and physically to complete tasks (e.g. employees finding the role too difficult); and
- Strong competition for employment with other industries results in high-turnover.

General observations with respect to Recruitment and Retention include:
- The most commonly cited origin of employees from survey respondents was local residents.
- Businesses relied most heavily on mature aged workers, followed by young underemployed workers when exploring new sources of labour to address deficiencies.
- Workers with a disability were not frequently cited as a source of new or alternative labour.
- Among employers of different size establishments, those with 5-19 full-time staff have greater recruitment challenges overall than those with 1-4 staff or with 20 or more staff.
- Across the districts, Sudbury has lower recruitment challenges overall, and Nipissing somewhat lower, than the area as a whole.
- Recruitment challenges which are higher than the area average include:
    - Accommodations managers (Sudbury and establishments with 20 or more full-time employees)
    - Cooks (establishments with 5-19 employees)
    - Front desk clerks (Nipissing and establishments with 5-19 employees)
    - Administrative support staff (establishments with 20 or more employees)
    - Food and beverage servers (establishments with 5-19 employees)

Skill Deficiencies

Employers felt that the following were important contributing factors to skill deficiency among employees:

- A lack of experience in the sector;
- A lack of opportunity to gain experience; and
- A lack of internal and external training.

When it comes to priority ranking for workforce initiatives and the issue of retention of employees, employers with more than 20 full-time staff give retention initiatives a far higher ranking than other employers. They are particularly interested in the following:

- A survey of local wage rates by occupation to help determine a competitive wage
- Help with identifying, choosing and implementing effective employee engagement strategies.

Profile of Survey Respondents

This survey was administered over several months in the spring of 2014 to tourism operators in the eastern portion of Northern Ontario. This included the districts of Nipissing, Manitoulin, Sudbury, Greater Sudbury, Temiskaming and Cochrane. In total, 138 respondents began the survey, and after the results were reviewed, 107 responses were cleared for analysis.

Location

Responses were received from across the Northeastern Ontario sector:

TABLE 19 Respondents by district (N=107)

DISTRICT	NUMBER	PERCENT SURVEY	PERCENT ACTUAL†
Sudbury	31	29%	8%
Nipissing	26	24%	24%
Greater Sudbury	14	13%	35%
Cochrane	12	11%	19%
Manitoulin	12	11%	5%
Timiskaming	12	11%	9%
TOTAL	**107**	**100%**	**100%**

† Only establishments with employees

The “Percent Actual” column represents the breakdown of tourism establishments by district according to the Canadian Business Pattern data, a count of employment establishments undertaken every six months by Statistics Canada. The main discrepancy between the survey and the actual number is the proportions represented by Sudbury and Greater Sudbury.

Tourism Industry Sector

The classification system used to identify industry sectors does not have a separate category for tourism. Rather, tourism crosses a number of formal industry sectors, as follows:

- Accommodation Services
- Food & Beverage Services
- Arts, Entertainment & Recreation
- Transportation
- Administrative & Support Services (travel agencies and tour operators)
- Other Services

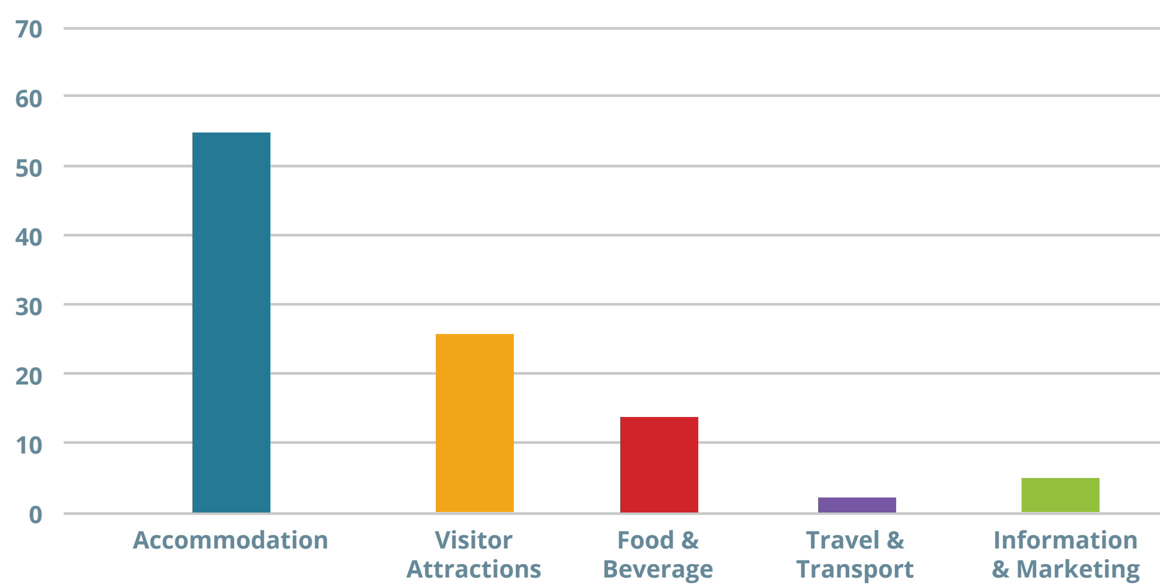
For the purposes of the survey, these formal categories were clustered as follows:

TABLE 20 Respondents by district (N=107)

SECTOR	NUMBER	PERCENT SURVEY	PERCENT ACTUAL†
Accommodation (Providing a place for visitors to stay overnight, e.g. hotel or RV park)	60	55%	21%
Visitor Attractions & Activities (Providing visitors things to see or do, e.g. museum or golf course)	28	26%	19%
Food & Beverage Services (Providing food or drinks to customers, e.g. restaurants or bars)	14	13%	57%
Travel & Transportation (Providing transportation or making travel arrangements, e.g. tours or travel agents)	2	2%	4%
Tourism Information & Marketing (info centres, district marketing organizations)	5	4%	N/A

† Only establishments with employees

CHART 12 Distribution of employers by tourism sector



The comparison between the survey profile and the actual breakdown of establishments by sector using the Canadian Business Pattern data shows an over-representation of accommodation establishments and an under-representation of food & beverage services. For the purpose of this survey, this is not such a problematic matter, as the higher proportion of accommodation establishment respondents allow for a good cross-section of different types of such businesses (hotels to hunting and fishing camps), while the food & beverage services only need cover full-service restaurants and limited service restaurants.

Respondents were further asked to identify the sub-sector to which their establishment belonged.

TABLE 21 Distribution of employers by tourism sub-sectors (N=106)

SUB-SECTOR	NUMBER
ACCOMMODATION	
Hotels (including Motor Hotels)	19
Housekeeping Cottages and Cabins	11
Motels	9
Bed & Breakfast	6
Hunting and Fishing Camps	6
Resorts	4
RV (Recreational Vehicle) Parks and Campgrounds	4
VISITOR ATTRACTIONS & ACTIVITIES	
Heritage institutions (museums, arts galleries, historic and heritage sites)	12
Festivals and fairs	7
Outdoor activities (golf courses, skiing facilities, marinas, nature parks)	6
Other amusement and recreation industries (fitness and recreational centres, bowling centres, arcades, gambling industries and other such industries)	1
Performing arts companies (theatre companies, dinner theaters, dance companies, musical theatre and opera, musical groups and artists)	1
FOOD & BEVERAGE SERVICES	
Full-service restaurants (meals brought to a table, including alcohol)	12
Limited-service eating places (fast food counters)	1
TRAVEL & TRANSPORTATION	
Scenic and sightseeing transportation	1
Travel agencies and tour operators	1
TOURISM INFORMATION & MARKETING	
Tourism information centres	3
Tourism marketing organization	2

Number of employees

Employers were asked to indicate the number of employees in their establishment, broken down by full-time, part-time and seasonal staff.

TABLE 22 Number of employees

	FULL-TIME	PART-TIME	SEASONAL
1-4 employees	50	37	53
5-19 employees	21	20	22
20-99 employees	20	13	5
100+ employees	2	2	1
TOTAL	93	72	81

The distribution of employees by different categories of employment (full-time, part-time and seasonal), not surprisingly, follows the same pattern with a much larger proportion of employees in the 1-4 number range. While fewer employers have part-time as opposed to seasonal staff, those that do can have larger number of employees in the part-time category (e.g. 13 employers citing 20-99 part-time employees, versus 5 employers citing 20-99 seasonal employees).

Furthermore, establishments with a larger number of full-time employees make up the vast majority and have larger numbers of part-time and seasonal staff. When a cross-tabulation is applied by the size of the establishment, the results indicate that 15 firms with 20 or more part-time staff, 13 of them have 20 or more full-time staff. Similarly, of the 6 firms with 20 or more seasonal staff, 4 of them have 20 or more full-time staff.

The distribution of employers by size of establishment in the survey is somewhat over-weighted toward smaller establishments:

TABLE 23 Number of employees

	PERCENT SURVEY	PERCENT ACTUAL†
1-4 employees	54%	31%
5-19 employees	23%	47%
20-99 employees	21%	21%
100+ employees	2%	1%
TOTAL	100%	100%

† Only establishments with employees

Recap of profile of survey respondents

Overall, there is a good distribution of employers, by geography, industry sector and number of employees, the only caution being the slight over-representation of small establishments (1-4 employees).

Key occupations

Once the characteristics of the employers' establishment had been gathered, the first substantive question of the survey sought to identify the key occupations for that employers' operation. The question was framed as follows:

- We wish to understand which occupations are key to your business. In some businesses, one person may perform two or more of these "occupations" or functions.
- Which of the following occupations or functions are key to your business, either because they represent a large portion of your workforce or because the success of your business greatly depends on these functions being carried out well?

The results are presented in the charts below, by different categories of occupations. In making these calculations, a baseline of all 107 survey respondents is used.

CHART 13 Key occupations – managers

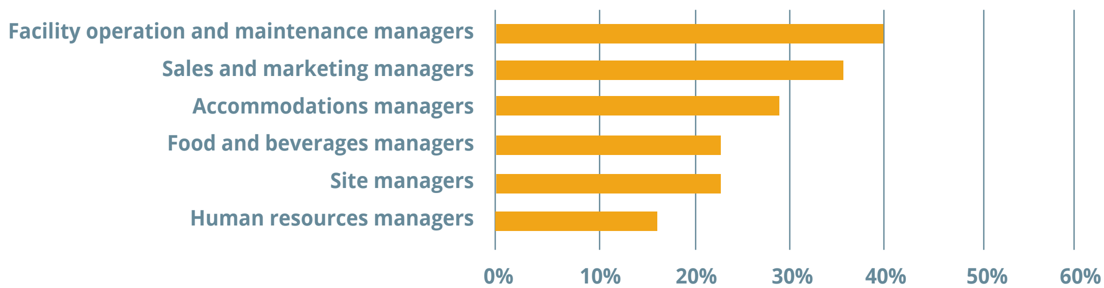


CHART 14 Key occupations – middle skill staff

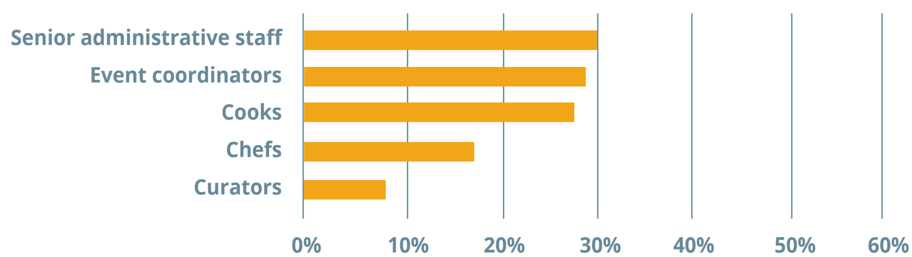


CHART 15 Key occupations – travel industry positions

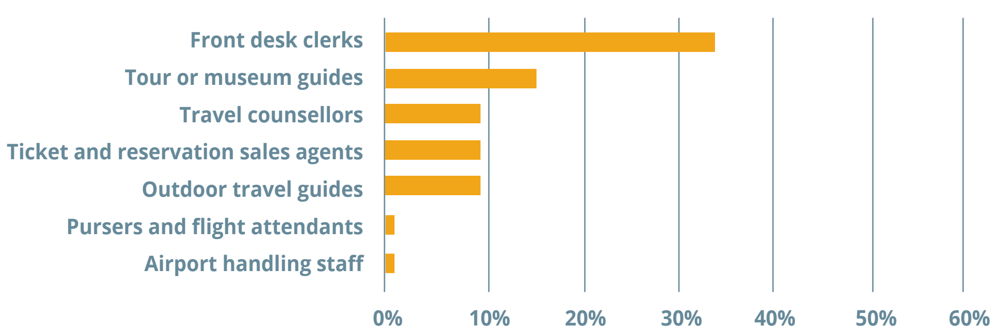


CHART 16 Key occupations – special skills

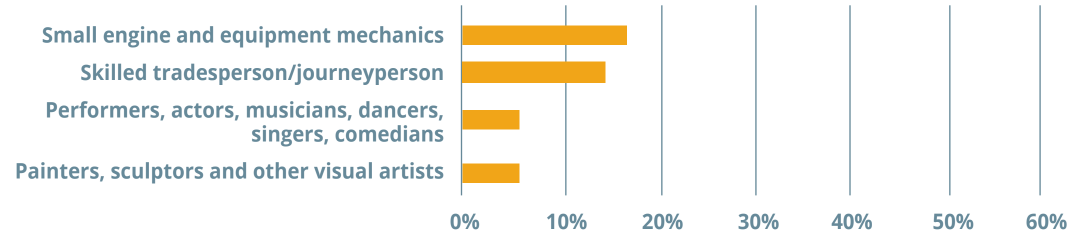
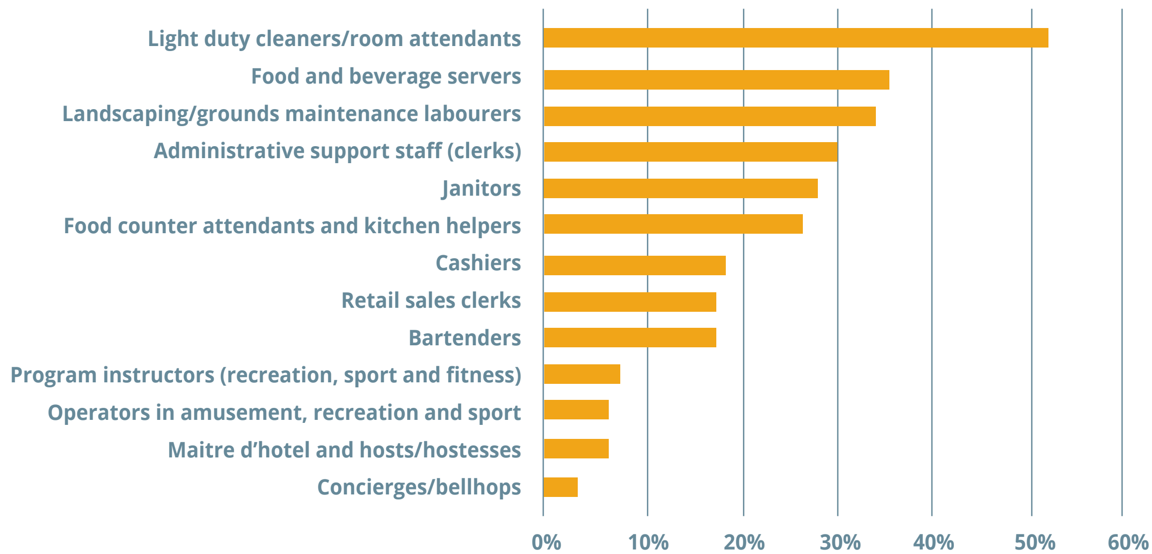


CHART 17 Key occupations – entry-level occupations



The following table highlights those occupations mentioned by at least 25% of the survey respondents.

TABLE 24 Key occupations cited by at least 25% of respondents

OCCUPATION	PERCENT
Light duty cleaners/room attendants	52%
Facility operation and maintenance managers	40%
Food and beverage servers	36%
Sales and marketing managers	35%
Landscaping/grounds maintenance labourers	34%
Front desk clerks	33%
Senior administrative staff	30%
Administrative support staff	30%
Event coordinators	29%
Accommodations managers	28%
Cooks	28%
Janitors	28%
Food counter attendants and kitchen helpers	26%

It is noteworthy that this list of key occupations spans such a range of skill levels, from lower-skilled entry-level positions, through various office and culinary functions, up to management occupations.

Employers were asked to offer other occupations as key functions which had not been named on the list. The following were the occupations added by employers:

Handyman (3 mentions)	**Marina staff**	**Spa estheticians**
Collections manager	**Pilots**	**Tourism info attendants**
Educational programmer	**Referee**	**Transport Canada certified personnel**
Housekeeping supervisors	**Scientists**	**Zookeeper**

Recruitment challenges

From the same list of occupations, employers were asked to rate the degree of difficulty in recruiting candidates for those positions.

For each cluster of occupations, a comparative score has been created. For every answer of “Very difficult,” a score of two is assigned, and for “Difficult,” a score of one. The scores are totaled and divided by the number of respondents who provided an answer for that occupation. The charts illustrate the responses: a score of “1” would mark “Difficult,” and a score of “2” would make “Very difficult.”

Tables have also been provided, showing the actual score for each occupation, the number of employers choosing to rank that occupation, and the actual number of employers choosing “Difficult” or “Very difficult.”

CHART 18 Degree of recruitment difficulty – managers

TABLE 25 Respondents by district (N=107)

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT
Food and beverage managers	0.97	29	10	9
Facility operation and maintenance managers	0.94	31	15	7
Site managers	0.88	25	12	5
Sales and marketing managers	0.77	35	19	4
Human resources managers	0.74	23	9	4
Accommodations managers	0.57	30	5	6

Most of the occupations in the manager cluster score over 0.70 for difficulty. Only the position of accommodations manager scores considerably lower.

CHART 19 Degree of recruitment difficulty – middle skilled staff

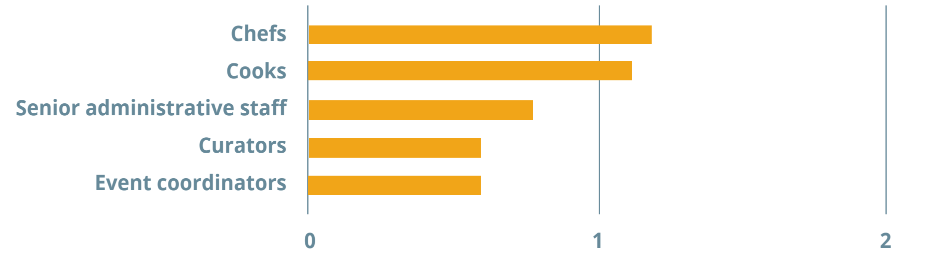


TABLE 26 Degree of recruitment difficulty – middle skilled staff

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT
Chefs	1.31	26	8	13
Cooks	1.17	36	10	16
Senior administrative staff	0.77	22	11	3
Curators	0.64	11	7	0
Event coordinators	0.62	26	12	2

The middle skilled positions pose a slightly greater level of recruitment difficulty, in particular the occupations of cooks and chefs, which both score over "1," the score for "Difficult." 26 employers claim to have difficulty hiring cooks and 21 assert the same regarding chefs.

CHART 20 Degree of recruitment difficulty – travel industry positions

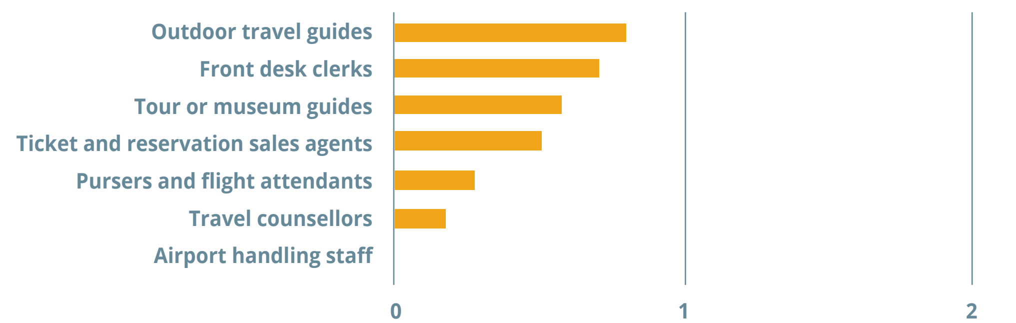


TABLE 27 Degree of recruitment difficulty – travel industry positions

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT
Outdoor travel guides	0.75	8	2	2
Front desk clerks	0.63	27	13	2
Tour or museum guides	0.55	11	6	0
Ticket and reservation sales agents	0.44	9	2	1
Pursers and flight attendants	0.25	4	1	0
Travel counsellors	0.22	9	0	1
Airport handling staff	0.00	4	0	0

These travel occupations appear to offer less of a recruitment challenge. Only the occupations of front desk clerks, tour or museum guides, and outdoor travel guides score 0.50 or higher. The number of employers citing difficulty in recruiting for these positions, apart from the 15 naming front desk clerks, is also low.

CHART 21 Degree of recruitment difficulty – special skills

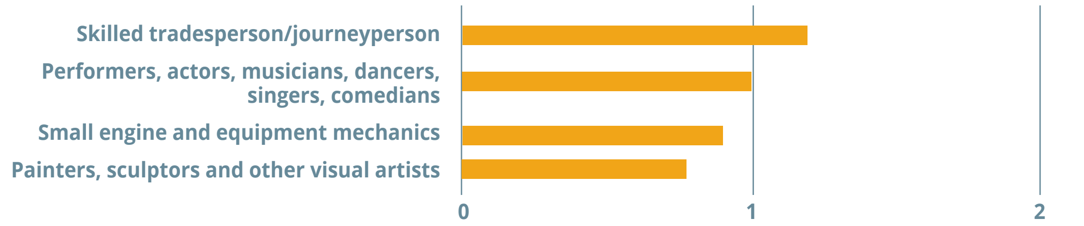


TABLE 28 Degree of recruitment difficulty – entry-level occupations

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT
Skilled tradesperson/journeyperson	1.29	14	8	5
Performers, actors, musicians, dancers, singers, comedians	1.00	5	3	1
Small engine and equipment mechanics	0.89	18	10	3
Painters, sculptors and other visual artists	0.75	8	4	1

These occupations involve a smaller number of employers expressing views on recruitment, but for those that do, these "special skills" occupations rate higher scores for difficulty.

CHART 22 Degree of recruitment difficulty – entry-level occupations

TABLE 29 Degree of recruitment difficulty – entry-level occupations

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT
Food counter attendants and kitchen helpers	1.09	22	10	7
Light duty cleaners/room attendants	0.95	40	22	8
Maitre d'hotel and hosts/hostesses	0.75	8	2	2
Janitors	0.70	23	12	2
Food and beverage servers	0.63	35	8	7
Operators in amusement, recreation and sport	0.60	5	1	1
Concierges/bellhops	0.60	5	3	0
Program instructors (recreation, sport and fitness)	0.57	7	2	1
Landscaping/grounds maintenance labourers	0.55	33	14	2
Bartenders	0.42	19	6	1
Retail sales clerks	0.41	17	7	0
Cashiers	0.40	20	4	2
Administrative support staff	0.38	26	10	0

There is a considerable range in the ranking of hiring difficulty when it comes to entry-level occupations, from the low scores for administrative support staff, cashiers, retail sales clerks and bartenders, to the high scored for light duty cleaners/room attendants and food counter attendants and kitchen helpers. More employers claim difficulty hiring for light duty cleaners/room attendants (30 employers) than for any other occupation, though several occupations attract hiring numbers for "Very difficult" – cooks (16), chefs (13) and food and beverage managers (9).

Table 30 lists the top 10 "key" occupations and the top 10 for recruitment difficulty. The shaded cells match those occupations that make both top 10 lists.

TABLE 30 Top 10 key occupations and top 10 recruitment difficulty

KEY OCCUPATIONS	PERCENT	HARD TO RECRUIT OCCUPATIONS	SCORE
Light duty cleaners/room attendants	52%	Chefs	1.31
Facility operation/maintenance managers	40%	Skilled tradesperson/journeyperson	1.29
Food and beverage servers	36%	Cooks	1.17
Sales and marketing managers	35%	Food counter attendants/kitchen helpers	1.09
Landscaping/grounds labourers	34%	Performers, musicians, dancers, singers	1.00
Front desk clerks	33%	Food and beverage managers	0.97
Senior administrative staff	30%	Light duty cleaners/room attendants	0.95
Administrative support staff	30%	Facility operation/maintenance managers	0.94
Event coordinators	29%	Small engine and equipment mechanics	0.89
Accommodations managers	28%	Site managers	0.88

Hiring demand

Respondents were asked to estimate the demands for these occupations in the tourism sector over the next two to five years. The survey offered four choices, and these were scored as follows:

Decrease significantly	-2
Decrease a little	-1
Increase a little	+1
Increase significantly	+2

The responses were totaled and divided by the number of respondents rating that occupation.

TABLE 31 Hiring demand in 2-5 years: managers

	Decrease a lot	Decrease a little	Increase a little	Increase a lot	Score	Answers
Food and beverage managers	0	4	5	6	0.87	15
Sales and marketing managers	0	6	10	3	0.53	19
Site managers	0	5	7	2	0.43	14
Accommodations managers	0	7	9	0	0.13	16
Human resources managers	0	6	4	0	-0.20	10

There is a considerable variation in the hiring expectations by managerial occupations. Food and beverage managers are expected to be in greater demand with human resource managers falling back slightly.

TABLE 32 Hiring demand in 2-5 years: middle skill staff

	Decrease a lot	Decrease a little	Increase a little	Increase a lot	Score	Answers
Cooks	3	5	13	7	0.57	28
Chefs	2	3	6	4	0.47	15
Event coordinators	1	5	9	1	0.25	16
Curators	1	2	5	0	0.13	8
Senior administrative staff	1	6	5	0	-0.25	12

Among middle skill staff, the only occupations which show a change worth noting are cooks and chefs. These occupations project slight hiring increases.

TABLE 33 Hiring demand in 2-5 years: travel industry positions

	Decrease a lot	Decrease a little	Increase a little	Increase a lot	Score	Answers
Front desk clerks	0	3	13	0	0.63	16
Outdoor travel guides	1	0	1	1	0.33	3
Tour or museum guides	1	2	4	0	0.00	7
Airport handling staff	1	0	1	0	-0.50	2
Ticket and reservation sales agents	1	2	1	0	-0.75	4
Travel counsellors	1	5	1	0	-0.86	7
Pursers and flight attendants	1	0	0	0	-2.00	1

Within the travel industry positions, four of the occupations had four or fewer respondents. As such, the ratings for these occupations should be taken with caution. This includes ticket and reservation sales agents, outdoor travel guides, airport handling staff, and pursers and flight attendants. Of the remaining occupations, front desk clerks are expected to increase a little, while travel counselors are expected to decrease a little.

TABLE 34 Hiring demand in 2-5 years: special skills

	Decrease a lot	Decrease a little	Increase a little	Increase a lot	Score	Answers
Performers, actors, musicians, dancers, singers, comedians	1	0	3	1	0.60	5
Small engine and equipment mechanics	2	2	4	3	0.36	11
Skilled tradesperson/journeyperson	2	2	6	1	0.18	11
Painters, sculptors and other visual artists	1	1	2	0	-0.25	4

Special skills has two occupations affected by few employer ratings, performers, actors, musicians, dancers, singers, comedians and painters, sculptors and other visual artists. With these two set categories aside the remaining occupations show very little predicted movement.

TABLE 35 Hiring demand in 2-5 years: entry-level occupations

	Decrease a lot	Decrease a little	Increase a little	Increase a lot	Score	Answers
Janitors	0	2	9	2	0.85	13
Food and beverage servers	1	5	12	8	0.81	26
Bartenders	2	2	7	5	0.69	16
Food counter attendants and kitchen helpers	1	3	8	4	0.69	16
Light duty cleaners/room attendants	2	4	23	2	0.61	31
Administrative support staff	1	3	14	0	0.50	18
Landscaping/grounds labourers	2	5	13	1	0.29	21
Cashiers	1	5	10	1	0.29	17
Retail sales clerks	1	3	6	1	0.27	11
Maitre d'hotel and hosts/hostesses	1	1	2	1	0.20	5
Operators - amusement, recreation	2	1	4	1	0.13	8
Program instructors (recreation)	1	1	2	0	-0.25	4
Concierges/bellhops	1	3	1	0	-0.80	5

Among entry-level occupations, several are expected to have increased demand in a few years, notably:

- Janitors;
- Food and beverage servers;
- Bartenders;
- Food counter attendants and kitchen helpers; and
- Light duty cleaners/room attendants.

Only one occupation is expected to experience a notable drop in demand, and that is concierges/bellhops.

Possible workforce development initiatives

The next portion of the survey requested respondents to rate an extensive series of potential workforce development initiatives. This included reviewing 25 possible initiatives and ranking them on a scale from "Not at all a priority" to "Highest priority." The full explanation of each possible initiative is listed in the table below, together with the abbreviated phrase that will be used in the subsequent charts. As well, these initiatives are clustered into a number of common categories, as they were presented in the survey.

PREPARING INDIVIDUALS FOR WORK

DESCRIPTION IN SURVEY	SHORT VERSION
Basic pre-employment programs familiarizing individuals with the expectations of a workplace (attendance, punctuality, taking direction)	Pre-employment programs
Work experience programs for high school students (e.g. co-op program)	Work experience for high school students
Work experience programs for community college students	Work experience for community college students
Work experience programs for private vocational college students	Work experience private vocational college students
Work experience programs for university students	Work experience for university students

HELPING EMPLOYERS RECRUIT JOB CANDIDATES

DESCRIPTION IN SURVEY	SHORT VERSION
Helping employers find entry-level and/or high turnover and/or seasonal staff	Help finding entry-level staff
Helping employers find intermediate or senior level staff	Help finding intermediate or senior-level staff
Increasing the potential labour pool by drawing on less traditional population groups (older workers, newcomers to Canada, persons with disabilities, Aboriginal populations)	Recruiting from less traditional population groups

HELPING EMPLOYERS RETAIN QUALITY EMPLOYEES

DESCRIPTION IN SURVEY	SHORT VERSION
Survey of local wage rates by occupation, to help determine a competitive wage	Survey of local wage rates
Help with identifying, choosing and implementing effective non-wage benefits	Advice on non-wage benefits
Help with identifying, choosing and implementing effective employee engagement strategies	Advice on employee engagement strategies

PROMOTING CAREER AWARENESS AND CAREER ADVANCEMENT

DESCRIPTION IN SURVEY	SHORT VERSION
Making high school students as well as new entrants into the workforce aware of career opportunities in the broader hospitality, tourism and recreation sectors	Career awareness for new entrants
Designing career pathway maps and providing support for career advancement for employees through career laddering programs (that is, explicit programs to support career advancement over several years)	Career advancement programs

TRAINING EXISTING STAFF

DESCRIPTION IN SURVEY	SHORT VERSION
Providing basic literacy, numeracy, computer and related essential skills	Training in literacy and essential skills
Providing customer service training and enhancing soft skills (such as interpersonal communications)	Customer service training
Providing skills for specific work-related functions (such as food order processing)	Training for specific work-related skills
Cross-training to increase the flexibility of your workforce	Cross-training for flexible workforce

ENHANCING RESOURCES FOR MANAGEMENT

DESCRIPTION IN SURVEY	SHORT VERSION
Developing useful guides to relevant resources (training options, career information)	Guides to relevant resources
Producing credible evidence of effective return on investment when using strategies such as training, non-wage benefits, employee engagement and so on	ROI evidence on workforce solutions
Improving supervisory and management skills in HR	Improving management HR skills
Helping management to develop and implement employee engagement strategies	Helping managers with employee engagement strategies

ADDRESSING FUNDING AND OTHER SYSTEMIC BARRIERS TO WORKFORCE CHALLENGES

DESCRIPTION IN SURVEY	SHORT VERSION
Facilitating the ability of more than one employer to share the costs of employee-training, to create economies of scale and of convenience	Partnerships to share training costs
Seeking funding to supplement the investment by employers into workplace training	Seeking funding for training
Developing partnerships whereby employers with different peak labour demand periods can share employees	Partnerships to share employees across seasons
Ensuring that the various parts of the workforce system (education, trainers, employment services, government, employers) are working together, developing programs together and sharing information in a timely fashion, and are working to serve employers	Making workforce system more effective

The scoring for these potential initiatives is listed below in two formats. Firstly, the cumulative response of all respondents is presented. An aggregate score for each item has been developed, where a “0” has been assigned to the lowest response (“Not at all a priority), up to a “6” for the “Highest Priority.” As well, the table identifies what percentage of respondents chose “the Highest Priority” for that item.

The scoring for these potential initiatives is listed below in two formats. Firstly, the cumulative response of all respondents is presented. An aggregate score for each item has been developed, where a “0” has been assigned to the lowest response (“Not at all a priority), up to a “6” for the “Highest Priority.” As well, the table identifies what percentage of respondents chose “the Highest Priority” for that item.

Secondly, comparisons will be made of aggregate scores by different employer population subgroups. This will identify the differences among a variety of categories of employers.

TABLE 36 Ranking of potential workforce initiatives, all respondents: total aggregate score and percentage of respondents scoring "Highest priority"

	Rank	Total	Highest
Customer service training	1	4.54	44%
Pre-employment programs	2	4.43	45%
Seeking funding for training	3	4.35	29%
Making workforce system more effective	4	4.28	34%
Cross-training for flexible workforce	5	4.22	31%
Career awareness for new entrants	6	4.12	28%
Help finding entry-level staff	7	4.02	37%
Help managers with employee engagement strategies	8	3.91	24%
Work experience for community college students	9	3.74	14%
Training for specific work-related skills	10	3.67	20%
Advice on employee engagement strategies	11	3.64	23%
Career advancement programs	12	3.63	14%
ROI evidence on workforce solutions	13	3.51	11%
Survey of local wage rates	14	3.49	24%
Work experience for high school students	15	3.46	16%
Help finding intermediate or senior-level staff	16	3.41	15%
Improving management HR skills	17	3.36	13%
Guides to relevant resources	18	3.32	14%
Partnerships to share training costs	19	3.29	18%
Work experience private vocational college students	20	3.26	12%
Training in literacy and essential skills	21	3.10	21%
Recruiting from less traditional population groups	22	3.04	19%
Advice on non-wage benefits	23	3.00	6%
Work experience for university students	24	3.00	13%
Partnerships to share employees across seasons	25	2.99	16%

The simple ranking of these potential initiatives by their scores provides one glimpse into the priority workforce issues for tourism employers. Comparing the scores to the percentage of who identified the initiative as a highest priority offers further insight. In cases where a larger number of respondents score the initiative as a highest priority, yet the item is otherwise ranked somewhat lower overall, means that for a subset of employers this is very important. However, it indicates that for another subset of employers, it ranks low on the list. This is the case for:

- Help finding entry-level staff;
- Survey of local wage rates;
- Training in literacy and essential skills; and
- Recruiting from less traditional population groups.

Similarly, some items have a high score, yet a smaller percentage of employers who choose it as their highest priority. In that case, while it is not the highest priority for many, a large proportion would have given it an above average scoring. This is the case with:

- Work experience for community college students; and
- Return on Investment (ROI) evidence on workforce solutions.

TABLE 37 Total aggregate score by size of establishment and by Accommodation sector

	ALL	1-4	5-19	20+	ACC
Customer service training	4.54	4.42	4.82	4.61	4.67
Pre-employment programs	4.43	4.30	4.56	4.58	5.02
Seeking funding for training	4.35	4.36	4.13	4.53	4.35
Making workforce system more effective	4.28	4.24	3.86	4.56	4.43
Cross-training for flexible workforce	4.22	4.33	4.25	3.61	4.43
Career awareness for new entrants	4.12	3.92	4.06	4.61	4.52
Help finding entry-level staff	4.02	4.00	4.41	3.89	4.20
Help managers with employee engagement strategies	3.91	3.59	4.00	4.31	3.81
Work experience for community college students	3.74	3.81	3.13	4.17	3.66
Training for specific work-related skills	3.67	3.42	4.00	3.35	3.90
Advice on employee engagement strategies	3.64	3.40	3.53	4.47	3.79
Career advancement programs	3.63	3.24	3.31	4.44	3.70
ROI evidence on workforce solutions	3.51	3.70	2.93	3.56	3.62
Survey of local wage rates	3.49	3.24	3.13	4.28	3.77
Work experience for high school students	3.46	3.49	3.00	3.56	3.67
Help finding intermediate or senior-level staff	3.41	2.97	3.50	4.35	3.17
Improving management HR skills	3.36	3.12	3.27	3.87	3.34
Guides to relevant resources	3.32	3.47	2.67	3.67	3.51
Partnerships to share training costs	3.29	3.61	2.80	2.87	3.26
Work experience private vocational college students	3.26	3.20	2.87	3.82	3.24
Training in literacy and essential skills	3.10	3.14	3.00	2.76	3.55
Recruiting from less traditional population groups	3.04	3.03	2.94	3.35	3.38
Advice on non-wage benefits	3.00	2.94	2.56	3.71	3.02
Work experience for university students	3.00	3.53	2.47	2.78	2.64
Partnerships to share employees across seasons	2.99	3.36	3.21	1.67	3.18

Table 37 provides the scores for four categories of respondents and compares these numbers to the overall survey results. The cells shaded green show results that are significantly higher than the average, and the cells shaded red show results that are significantly lower than the average. The four categories are listed below and include the number of respondents in each category in brackets, which varied by initiative. This includes

- 1-4 employees (33-37 respondents)
- 5-19 employees (14-18 respondents)
- 20 or more employees (15-19 respondents)
- Employers in the Accommodation sector (39-47 respondents)

Not surprisingly, employers with 1-4 employees rank initiatives related to HR issues (e.g., employee engagement and career advancement) lower because they have few staff. They also express less need for help in finding intermediate or senior level staff, likely because the employer fills this role. On the other hand, they are more inclined to seek partnerships with other employers to reduce training costs and even to share employees across seasons. They are also more attracted to hosting university students for work experience purposes.

Medium-sized firms (5-19 employees) appear less interested in work experience programs and had lower scores for hosting community college students, high school students and university students. They also scored several initiatives lower that involved receiving information (e.g. evidence on return on investment from HR practices, guides to relevant resources, advice on non-wage benefits). They are also less inclined to partner with other employers to reduce training costs, however they score customer service and technical skills training very high. This group is likely to desire help with finding entry-level workers.

Larger firms (20 or more employees) also appear less interested in training partnership with other employers. In addition, they are also less attracted to cross-training initiatives. However, due to their size they are more interested in initiatives directed at employees, such as engagement strategies, career advancement programs, advice on non-wage benefits and surveys of wages. This group is more inclined to seek assistance recruiting intermediate or senior staff.

Employers in the accommodation sector rank pre-employment programs very highly, and also give higher marks to training in literacy and essential skills. They also score higher career awareness for new entrants and recruiting from less traditional population groups. They are less inclined to seek assistance finding intermediate or senior staff.

Table 38 compares the ranking given to each initiative by the various sub-populations of employers in the survey. The table is colour-coded to make it easier to see the differences and similarities in the rankings.

TABLE 38 Ranking of potential initiatives by size of establishment and Accommodation sector

	ALL	1-4	5-19	20+	ACC
Customer service training	1	1	1	1	2
Pre-employment programs	2	4	2	3	1
Seeking funding for training	3	2	5	5	6
Making workforce system more effective	4	5	9	4	4
Cross-training for flexible workforce	5	3	4	16	4
Career awareness for new entrants	6	7	6	1	3
Help finding entry-level staff	7	6	3	12	7
Help managers with employee engagement strategies	8	11	7	9	9
Work experience for community college students	9	8	15	11	14
Training for specific work-related skills	10	15	7	20	8
Advice on employee engagement strategies	11	16	10	6	10
Career advancement programs	12	18	12	7	12
ROI evidence on workforce solutions	13	9	20	18	15
Survey of local wage rates	14	18	15	10	11
Work experience for high school students	15	13	17	18	13
Help finding intermediate or senior-level staff	16	24	11	8	23
Improving management HR skills	17	22	13	13	19
Guides to relevant resources	18	14	23	15	17
Partnerships to share training costs	19	10	22	22	20
Work experience private vocational college students	20	20	21	14	21
Training in literacy and essential skills	21	21	17	24	16
Recruiting from less traditional population groups	22	23	19	20	18
Advice on non-wage benefits	23	25	24	17	24
Work experience for university students	24	12	25	23	25
Partnerships to share employees across seasons	25	17	14	25	22

LEGEND: Rank: 1-6 Rank: 7-12 Rank: 13-18 Rank: 19-25

Participation in workforce development initiatives

The survey requested that employers assess different potential workforce initiatives. As such, the next set of survey questions pushed further, asking respondents whether they would actually participate in a range of workforce development initiatives.

Work placement programs. The first set of questions asked about hosting various levels of students under a work placement program, as follows:

- A high school student;
- A private vocational college student;
- A community college student;
- A university student; and
- A trade certificate apprentice.

Employers were asked to indicate which statement best reflected their view:

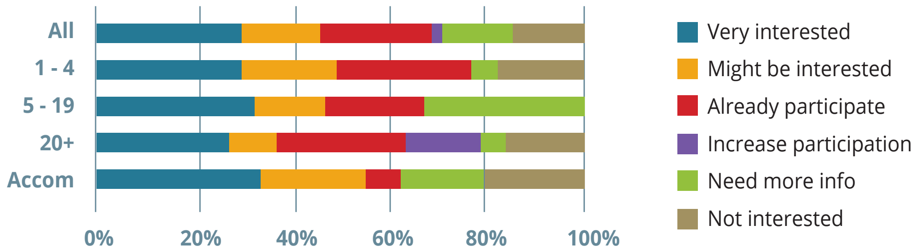
- I would be very interested to participate;
- I might be interested to participate;
- I already participate in such an activity;
- I already participate in such an activity, but I would consider expanding what I am already doing;
- I would need more information before I could make a decision; or
- I am not interested in participating.

In the following tables, these responses are abbreviated as follows:

DESCRIPTION IN SURVEY	SHORT VERSION
I would be very interested to participate	Very interested
I might be interested to participate	Might be interested
I already participate in such an activity	Already participate
I already participate in such an activity, but I would consider expanding what I am already doing	Increase participation
I would need more information before I could make a decision	Need more info
I am not interested in participating	Not interested

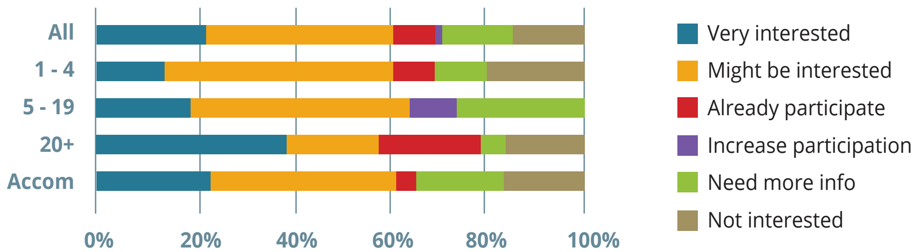
The general pattern for virtually each of these questions, regardless of the type of placement is that the level of “very interested” increases with the size of the establishment. There is usually a correspondingly high level of “might be interested” among the smaller firms, a tentative interest that often appears higher among firms with 1-4 employees than among firms with 5-19 employees.

CHART 23 Willingness to host a high school work placement student



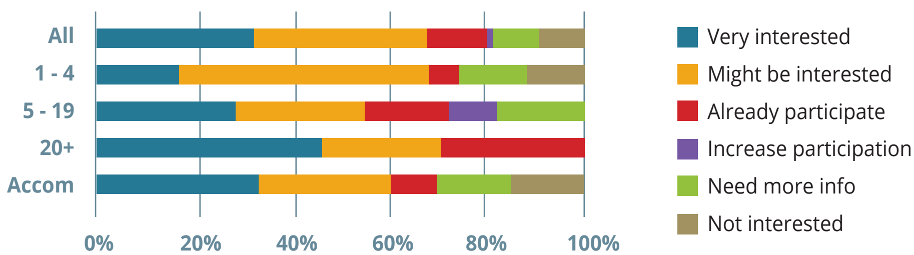
It is important to note that a high proportion of firms already host a high school placement. This is notable among firms with 1-4 and over 20 employees. In addition a number wish to increase their usage of high school placements.

CHART 24 Willingness to host a private career college work placement student



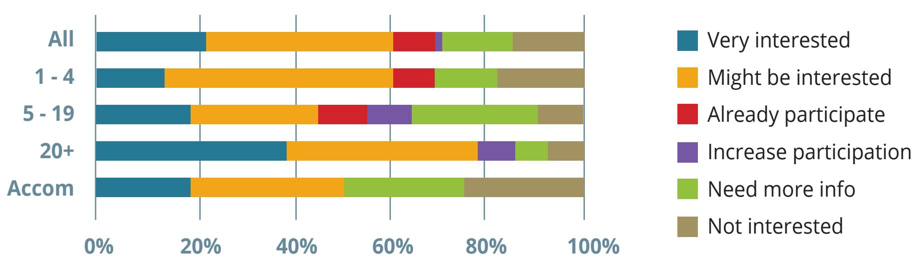
Overall, the potential interest in placements from private career colleges ("very interested" and "might be interested") is higher than that expressed for high school students. This may be influenced by the fact that a considerable number of employers already host high school students.

CHART 25 Willingness to host a community college work placement student



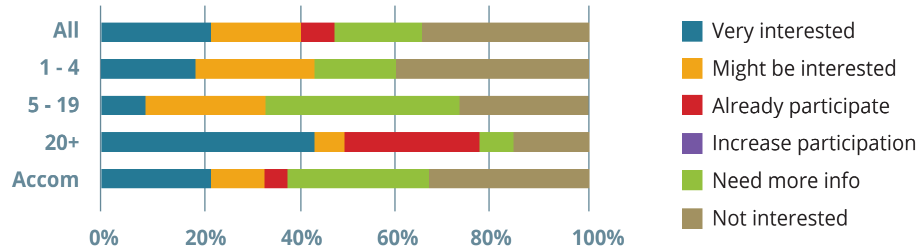
The highest interest for placements is in the category of community college students.

CHART 26 Willingness to host a university work placement student



Even though there seemed to be low support for university student placement among the ranking of potential workforce initiatives reviewed earlier, there appears almost the same level of support for university student placements as there is for community college student placements.

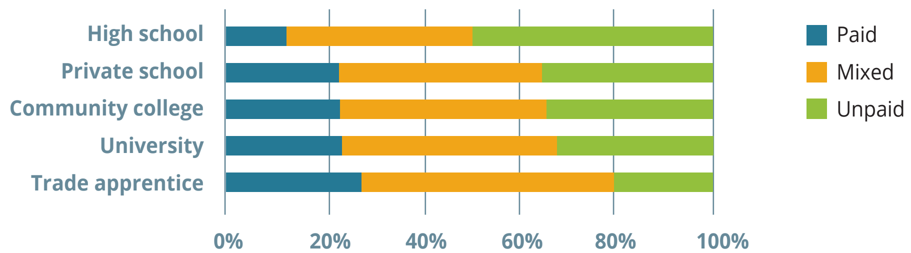
CHART 27 Willingness to host a trade certificate apprentice



The option of hosting a trade certificate apprentice attracts the highest level of “not interested” among all the placement options, except among establishments with 20 or more employees, who also already have a high rate of current placement.

Paying for a work placement. Most employers are prepared to pay for some portion of the cost of a placement, except in the case of a high school placement. When referring to high school placements, only one half of the employers indicated that they would expect not to pay. However, one third of the employers would expect not to pay in the case of a placement of a private career college, community college or university student, and only one fifth of employers would expect not to pay for a trade apprentice placement.

CHART 28 Willingness to host paid or unpaid work placements, all employers



Training programs. Employers were next asked about their willingness to host different kinds of training in their workplaces. The survey provided the following options:

- Hosting workplace training for literacy and essential skills;
- Hosting workplace training for customer service and soft skills;
- Hosting workplace training for specific work-related functions; and
- Hosting workplace training for supervisors and management.

As was the case with hosting a work placement, employers were asked to indicate which statement best reflected their view:

- I would be very interested to participate;
- I might be interested to participate;
- I already participate in such an activity
- I already participate in such an activity, but I would consider expanding what I am already doing;
- I would need more information before I could make a decision; or
- I am not interested in participating.

With respect to workplace training, there is less interest in training for literacy and essential skills, but higher interest in training for specific work-related functions, training for supervisors and management, and training for customer service and soft skills. Establishments with 5-19 employees have a higher interest in training related to literacy and essential skills and specific work-related functions, while larger firms (20+ employees) have a high interest in training in customer service and soft skills and for supervisors and management.

CHART 29 Willingness to host workplace training for literacy and essential skills

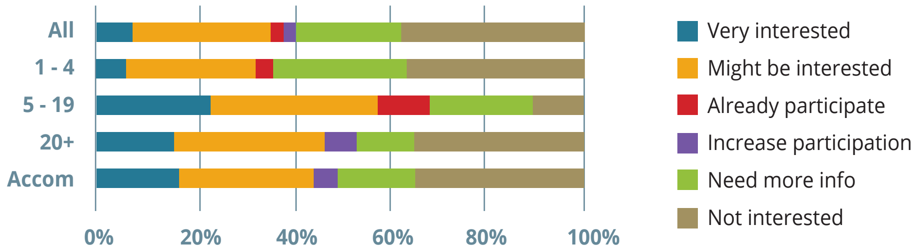


CHART 30 Willingness to host workplace training for customer service and soft skills

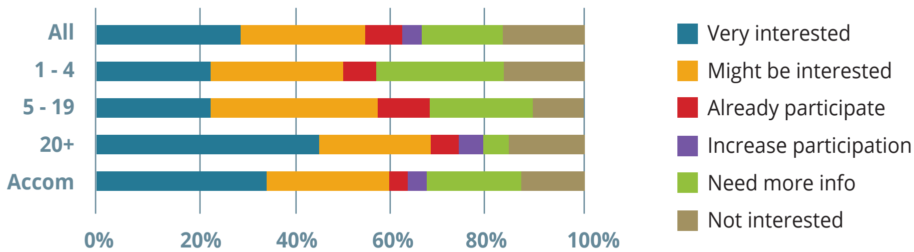


CHART 31 Willingness to host workplace training for specific work-related functions

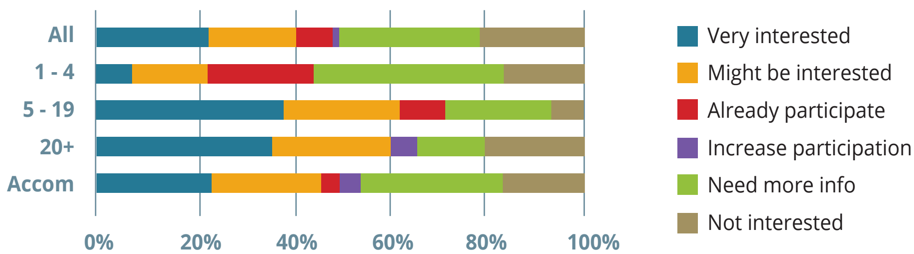
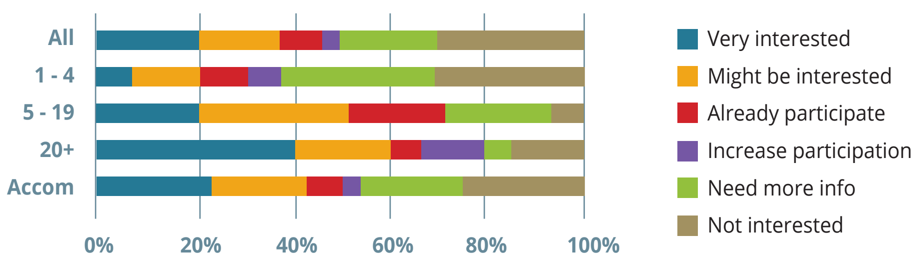


CHART 32 Willingness to host workplace training for supervisors and management



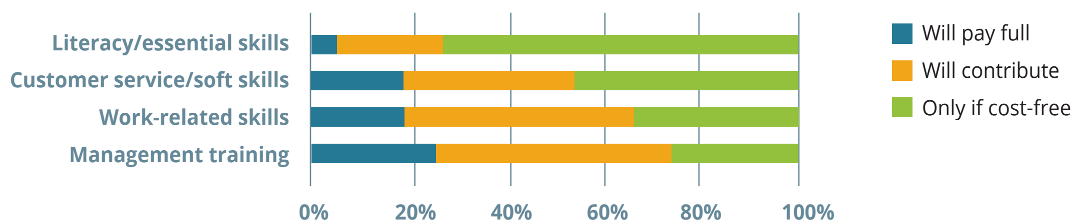
One unusual anomaly identified was that in almost every category, the percentage of respondents that indicated they were "not interested" is greater than the percentage that indicated they were "not interested" for each of the sub-categories (1-4, 5-19 and 20+ employees). Mathematically, this should not be the case. However, a number of respondents who answered the survey did not provide their employee size numbers, and said respondents had a higher proportion of those indicating they were "not interested" in these forms of training.

Paying for the cost of training. Employers make a clear distinction regarding the kinds of training they are prepared to contribute to the cost. Literacy and essential skills training attracts considerably less employer financial contribution compared to the other types of training proposed.

Employers were asked to indicate their views on costs for each of the four types of training:
- Literacy/essential skills;
- Customer service/soft skills;
- Training for work-specific functions; and
- Training for supervisors and managers.

In doing so they could choose among the following three options:
- If right training, would pay the entire cost;
- Willing to contribute to cost; or
- Will participate if training is cost-free.

CHART 33 Willingness to contribute to the cost of training, all employers



More than three-quarters of employers indicate that they would only host literacy or essential skills training in their workplace if it was free. Interestingly, almost half say the same thing about customer service and soft skills training. Their willingness to either pay full cost or to contribute does not differ too much from their responses regarding work-related skills training or management training. Employers are most prepared to pay their way for training provided to managers and supervisors.

Partnerships in workforce development. Finally, employers were asked about their willingness to join in partnerships with other stakeholders for the purpose of addressing common workforce issues. Three categories of partnerships were proposed:
- Working together with other employers on workforce issues;
- Developing links with local education sector partners; and
- Developing links with employment services providers.

As with previous similar questions, employers were asked to indicate which statement best reflected their view:
- I would be very interested to participate;
- I might be interested to participate;
- I already participate in such an activity;
- I already participate in such an activity, but I would consider expanding what I am already doing;
- I would need more information before I could make a decision; or
- I am not interested in participating.

Overall, there was little difference in the interest levels among all employers toward participating in any of these types of partnerships. Indeed, there was a not insignificant amount of such partnering already taking place, according to the survey responses "I already participate" and "might increase participation". Overall, larger employers (20+ employees) expressed greater interest in all forms of partnership. Strikingly, none of the larger employers, for any of the options, indicated that they were "not interested." As well, larger employers were more likely to indicate that they wished to increase their participation in all forms of partnership.

CHART 34 Willingness to work together with other employers on workforce issues

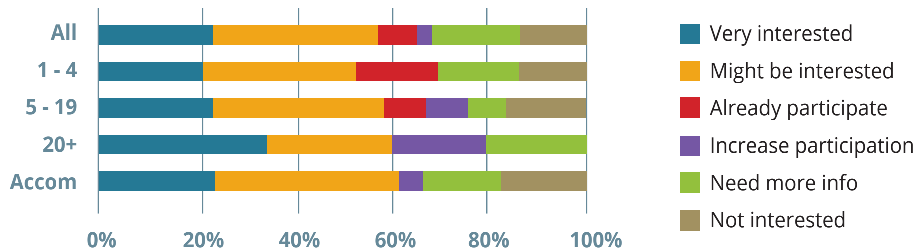


CHART 35 Willingness to develop links with local education sector partners

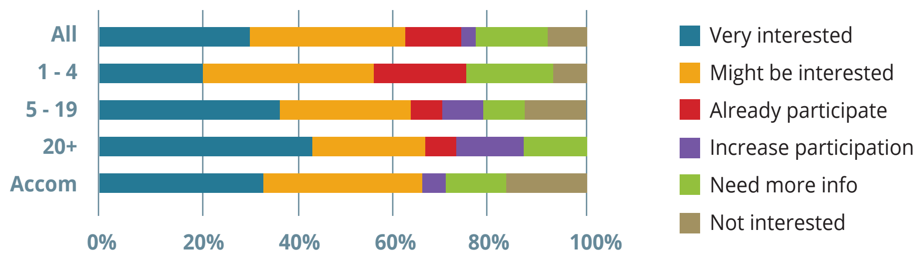
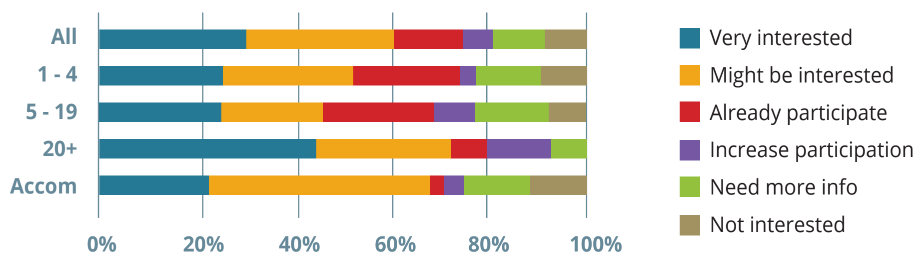


CHART 36 Willingness to develop links with employment services providers



Succession planning

Finally, respondents were asked regarding succession planning within their operations, as follows:

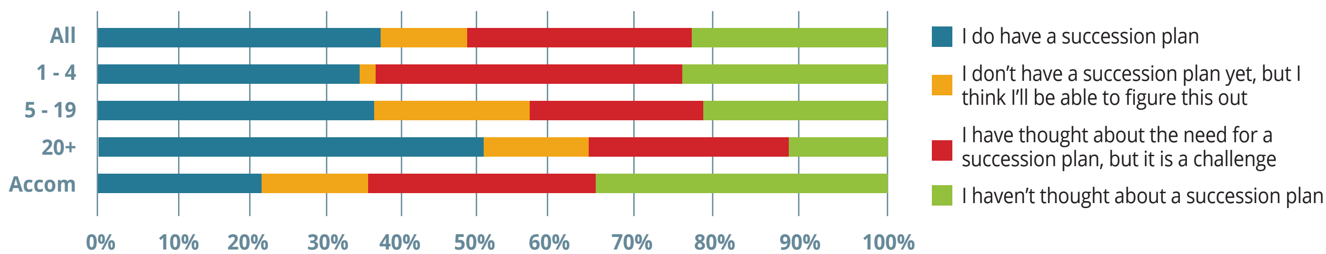
"Have you given thought to or do you have a succession plan in place for your business?"

Respondents were provided with several options to choose in response. Slightly over one third of all respondents have a succession plan, while close to half either haven't thought about one or feel that this issue is a challenge for them.

Over half of the larger firms (20 or more employees) indicated that they have a succession plan, while smaller firms are less likely to have one. Firms with 1-4 employees feel challenged by this issue.

This is one question where employers in the accommodation sector have a noticeably different response from the average: Accommodation establishments are more likely not to have thought about a succession plan and less than one quarter have a succession plan in place.

CHART 37 Willingness to develop links with employment services providers



KEY INFORMANT CONSULTATIONS

The stakeholder engagement process was an integral step in acquiring the primary research necessary to developing the LMI Study. Consultations with key informants from industry groups representing a diverse spectrum of geographic areas provided anecdotal evidence in relation to perceptions toward labour and skills challenges. Geographic areas included Sudbury, Timmins, North Bay, Temiskaming Shores and Cochrane.

This process also served to evaluate two key aspects:

1. The level of involvement or priority placed by organizations in the tourism sector; and
2. The overall interest in partnership opportunities related to the development of the Implementation Plan.

Focus for this portion of the industry engagement process was primarily placed on resource stakeholders and delivery agents. Stakeholders can be placed in one of three categories, Project partners, Northeastern Ontario Board and Staff and Industry Resource & Support Organizations. A variety of engagement methods were provided in order to gain as much input into the process as possible:

- One-on-one interviews
- Focus groups
- Teleconferences
- Surveys

Stakeholder Groups

Through the collection of data, in a series of interviews and discussions, the perceptions of various stakeholder groups were explored regarding issues concerning the supply and demand for labour, present and anticipated, in Northeastern Ontario. Upwards of 25 organizations identified as being currently mandated and/or involved in some aspect of either delivering or supporting programs associated to the tourism industry were invited to participate. The purpose of the discussion was to synthesize a composite picture of labour market issues, trends, proposed future directions and recommendations for action. Key informants from the groups below were contacted as part of this process:

- Sub regional Representatives
- Community Futures Development Corporations
- Chambers of Commerce
- Municipalities
- Small Business Enterprise Centres
- Post-Secondary
- Settlement Agencies
- Workforce Development Boards
- Economic Development Agencies
- Ministry Representatives

Input & Outcomes

Stakeholder engagement played a key role in the development of the overall plan. Efforts were made to connect with key informants on a one-on-one basis to gain insight into the tourism industry based on varying perspectives.

Each key informant was provided with an opportunity to answer a short series of questions. There are a number of themes that emerged from the discussions. Some of these are more prevalent in certain areas of the region however most seem to encompass the views of the participants regardless of geographical location. The following comprises a summary of responses collected.

Q.1. *What would you say are the top three labour market challenges faced by the industry?*

- Recruiting entry level staff for seasonal work
- Finding skilled staff
- Low wages makes it hard to compete
- Lack of work ethic and ambition among youth
- Perception that tourism does not present a real career opportunity, but rather am "in the meantime job"

Q.2. *For which positions does the industry seem to have the most difficulty attracting and/or retaining qualified staff?*

- Kitchen staff / cooks
- Housekeeping
- Maintenance / General Labourers

Q.3. *Are you aware of any existing programs that could assist the industry in meeting its labour market challenges now and into the future? (regional or otherwise).*

Training & Skills Development Programs:

- OTEC
- MNO Ready to Work Program
- Gezhtoojig Training Services
- High School and Post-Secondary Coop Programs

Employment Programs:

- NOHFC Internships
- Gezhtoojig Employment Services
- Employment Ontario

Q.4. *Do you have any unique ideas on how the industry can better meet these challenges?*

- Expand internship programs to make them accessible for seasonal operations;
- Consider automation for hotel check in process;
- Expand existing training programs to include a transitional mentoring component once individuals have received job placements;
- Develop training programs that can be customized and offered at a local level;
- Develop opportunities for operators to share labor as many are seasonal or can only offer; and
- A limited number of hours per week.

Q.5. *Do you have any further comments or observations that you would like to share regarding this topic?*

- The industry presents an excellent opportunity for youth to learn and hone their skills;
- There is a significant need for succession planning;
- Many operators do not have the business skills required to recruit and manage employees; and
- There is a need to look at the non-participants in the workforce and investigate the reasons for non-participation, whether this is due to a skills gap, life situation, and/or economic reasons.

Key Trends

Based on the research analysis presented, the following provides a summary of the key trends identified.

Broad Strategy Implications

Career Development: A perceived lack of career development ranks as the most significant contributor to employee turnover by businesses surveyed. However, the creation of structured career pathways ranks low among business responses. Support for structured career paths (where they can be created) could support improvements in retention and productivity.

Training: Improved accessibility to training, particularly in regional/rural areas is required. Furthermore, ensuring training is relevant to the needs of industry will benefit retention and support skill development.

Alternative labour sources: Only a small proportion of businesses said they were investigating non-traditional sources of labour as a means of addressing skills shortages. Scope exists to further integrate into the industry mature age workers, Aboriginal workers, long-term unemployed, those with a disability and foreign workers.

Regional Solutions: The size and nature of the labour force challenges for tourism are quite similar across the region. While occupations impacted by labour and skills deficiencies vary somewhat there is room for the delivery of localized solutions. The development of a regional tourism labour market implementation plan, as a starting point, will support this measure.

7. CONCLUSIONS & NEXT STEPS

The information presented in this report provides an analysis of the research collected throughout the LMI process. While this data plays a significant role in setting the foundation, there are several crucial contributing factors that will affect the tourism sector's ability to be successful. Ensuring that the industry is at the forefront throughout the implementation of new initiatives is a critical element. In addition, the following aspects are important to consider at all times.

- How can lead organizations implement "grassroots" processes that includes buy-in and broad consultation with industry;
- How can lead organizations work collaboratively with partners on an ongoing basis to deliver localized solutions; and
- How can lead organizations ensure that programs and partnerships reflect the needs of industry.

IMPLEMENTATION PLAN

To support next steps, please refer to the LMI Northern Ontario Implementation Plan which provides a roadmap for potential new initiatives to combat identified challenges and gaps. The Implementation Plan takes into account the trends and opportunities throughout Northern Ontario following the complete LMI research process. Based on the sub-regional research reports, the Implementation Plan guides the process for next steps.

The Implementation Plan offers pan-Northern and sub-regional strategies based on identified trends and themes. The plan has been developed as a mechanism to assist the development of a strong and committed labour force within the tourism sector. With an overall vision to create a healthy sector, the Implementation Plan identifies strategies to build upon opportunities and mitigate challenges.

The objective of the LMI process has been to understand the needs of the labour market within the tourism sector in order to develop a new approach to support future growth. Project partners are encouraged to utilize the three sub-regional reports and the Implementation Plan to guide community partners and industry through the advancement of Northern Ontario's tourism workforce.

APPENDIX A:

NORTHEASTERN ONTARIO
LABOUR MARKET INITIATIVE SURVEY