TOURISM LABOUR MARKET INITIATIVE
Algoma/North Central & Northwest Ontario

TOURISM NORTHERN ONTARIO

The Labour Market Group
Guiding partners to workforce solutions.

FedNor Canada

Ontario
Ministry of Tourism, Culture and Sport

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1. EXECUTIVE SUMMARY

Tourism is an essential sector in Northern Ontario and 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. Following the completion of the Northeastern Ontario Labour Market Initiative (LMI), an opportunity to create a similar study in Algoma/North Central and Northwest Ontario was initiated. A detailed analysis of the current workforce landscape was essential to foster sustainable growth within the tourism sector. Combined with the results from the Northeastern Ontario LMI, the study is intended to be a useful tool for a range of stakeholders who can lead the growth of the industry's labour market in Northern Ontario.

The purpose of the Algoma/North Central and Northwest 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. Similar to Northeastern Ontario results, the feedback received suggests that the majority of employers anticipate that employment in the sector will grow a little overall in the next 2-5 years. The types of support sought by the industry to address their labour force issues were prioritized as follows:

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

The study in Algoma/North Central and Northwest Ontario identified that in addition to the labour force issues, the following were specific challenges that required support:

- Help finding entry-level staff;
- Customer service training;
- Pre-employment program identification; and
- Seeking funding for training.

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.

As a similar LMI research study was undertaken in Northeastern Ontario, the data collected was analyzed and pan-Northern recommendations were identified. The recommendations and action items are summarized in the Labour Market Initiative Implementation Guidebook. The document complements the research reports and provides a roadmap for potential new initiatives to combat identified challenges and gaps.

The Implementation Guidebook offers strategies based on identified trends and themes and has been developed as a mechanism to assist the development of a strong and committed labour force within tourism. With an overall vision to create a healthy sector, the purpose is to identify strategies, build upon opportunities and mitigate challenges.

2. INTRODUCTION

The Ontario tourism industry contributes more to the provincial GDP than the entire primary sector, including forestry and mining . As an essential sector in Northern Ontario it is critical to ensure growth and sustainability into the future. Fortunately, Northern Ontario has several key organizations committed to assisting the tourism sector with development, including the Workforce Planning Boards, such as the Labour Market Group and the Regional Tourism Organizations, such as Tourism Northern Ontario.

The Labour Market Group is one of 25 workforce planning boards across Ontario. The boards conduct localized research and actively engage organizations and community partners in local labour market projects.

Tourism Northern Ontario is one of 13 Regional Tourism Organizations across Ontario. The organization is committed to increasing tourism receipts and building a strong and vibrant sector. Workforce and training is one of the four priority areas that contribute to the progress of the tourism sector. To foster sustainable growth a detailed analysis of the current landscape is essential.

In early 2014, the Labour Market Group and Tourism Northern Ontario, in partnership with Workforce Planning for Sudbury & Manitoulin, Far NorthEast Training Board and Northeastern Ontario Tourism, developed a workforce research study in Northeastern Ontario. Based on the success, an opportunity to expand the project to Algoma/Northcentral and Northwest Ontario was created. The initiative allowed for a concentrated effort towards workforce challenges and opportunities in the tourism sector.

The geographic districts located throughout Northern Ontario, include:

Northeastern Ontario – (13A)
- Nipissing
- Manitoulin
- Greater Sudbury
- Sudbury
- Timiskaming
- Cochrane* (eastern portion)

*** Data is only available at the district level within all tables/charts within the report.**

Algoma/North Central Ontario – (13B)
- Algoma
- Cochrane* (western portion)

*** Data is only available at the district level within all tables/charts within the report.**

Northwestern Ontario – (13C)
- Thunder Bay
- Rainy River
- Kenora

The Labour Market Initiative (LMI) focused on the three tourism sub-regions of Northern Ontario, including Northeastern, Algoma/Northcentral 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 Algoma/Northcentral and Northwest Ontario. This document relates to Algoma/Northcentral and Northwest Ontario and the labour market landscape currently impacting the tourism sector. The LMI provides details about the labour and skills climate in the tourism industry at a regional level.

The Labour Market Group in partnership with Tourism Northern Ontario, led the LMI in Algoma/Northcentral and Northwest Ontario. The project team hired to conduct the assessment 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 data. The findings presented in this report reflect the outcomes of a detailed analysis conducted to inform future labour force policy in the tourism sector.

The outcome of the LMI has the potential 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] source: http://www.mtc.gov.on.ca/en/publications/Discover_Ontario_en.pdf

3. BACKGROUND

The LMI has been developed to identify gaps and create strategies that can be implemented to strengthen the status of the tourism workforce. This can be accomplished by encouraging partners to work together and deliver targeted support to assist the industry.

The LMI study highlights comparative industry data across Ontario as a whole, and specifically Algoma/Northcentral and Northwest Ontario's tourism sector. The process includes analyzing and comparing results based on an industry-wide survey.

The study area included five districts located throughout Algoma/Northcentral and Northwest Ontario. This includes Algoma, Cochrane (western portion), Thunder Bay, Rainy River and Kenora. The project was comprised of a review of existing data, a survey, regional focus groups and one-on-one interviews. The LMI includes 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 provided 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 Algoma/Northcentral and Northwest, accounting for approximately thousands of jobs annually. According to the Regional Tourism Workforce & Training Strategy, tourism-related occupations account for 40% of the total labour force in Northern Ontario.

Algoma/Northcentral and Northwest relies on the tourism sector in a variety of capacities including 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 Algoma/Northcentral and Northwest Ontario. This analysis covers the following districts:

- Algoma
- Cochrane (Data is only available at district level)
- Thunder Bay
- Rainy River
- Kenora

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

It is important to note that the Cochrane district is divided between Northeastern Ontario and Algoma/North Central. As such, the data is only available at the district level within all tables/charts throughout the report.

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.

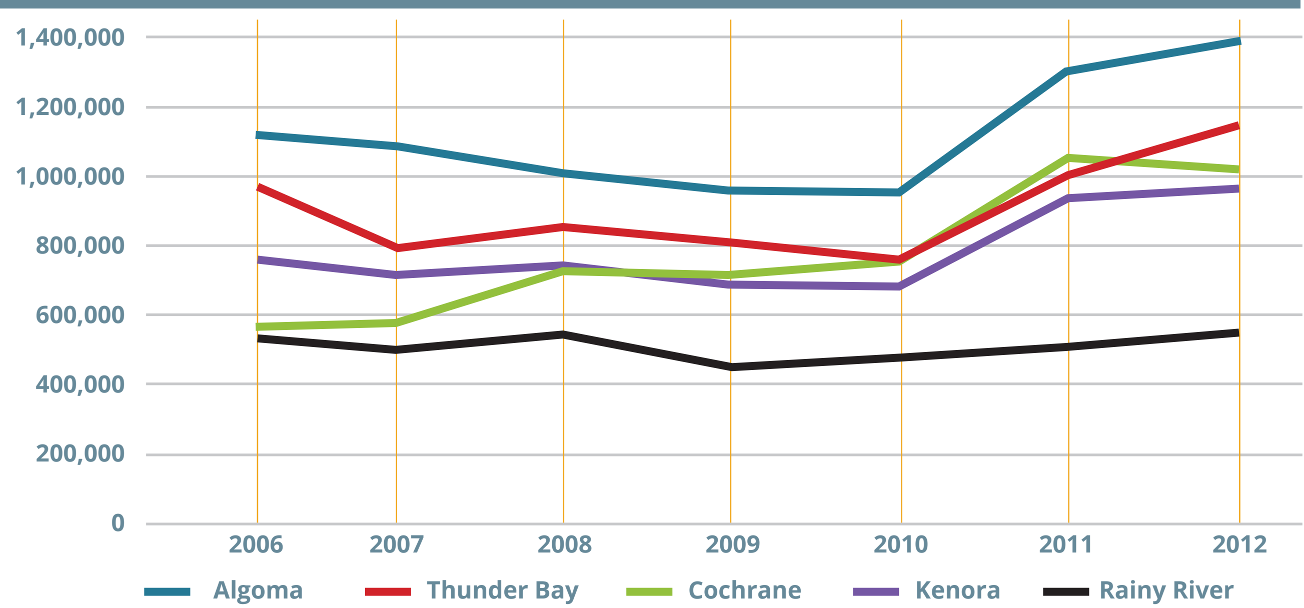
Total Number of Tourist Visits

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. With smaller geographic areas the samples can be relatively small. As a result, it is useful to show the data over multiple years to illustrate possible trends by averaging out the responses to reduce the margin of error. In addition, 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. Table 1 provides the survey estimates for the number of tourist visits to each district for 2006 to 2011. Chart 1 provides the annual number of person-visits within each district.

TABLE 1 Annual number of person-visits, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2006-2012

	2006	2007	2008	2009	2010	2011	2012
Algoma	1,129,870	1,116,651	1,032,456	974,970	940,170	1,341,028	1,397,718
Cochrane	548,489	588,476	709,463	695,294	762,081	1,037,646	1,071,826
Thunder Bay	974,514	791,216	840,212	800,138	752,728	999,114	1,151,192
Rainy River	536,544	496,597	521,500	462,904	481,632	501,231	555,147
Kenora	763,711	728,997	749,400	708,468	656,330	848,797	871,519

CHART 1 Annual number of person-visits, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora



When this data is plotted on Chart 1, the break between the pre- and post-2010 data becomes very apparent. The visitor numbers rise significantly for four of the five districts, in most cases running counter to a downward trend that had been present for the previous five years. At the very least, the relative position of the five districts, in terms of number of visitors, appears the same, with Algoma experiencing the most visitors annually, followed by Thunder Bay, Cochrane, Kenora and then Rainy River.

These absolute numbers require some 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 from 2006-2012 to the 2011 population of each area.

Thus, although Rainy River has the lowest average number of annual visitors because of its considerably smaller population, it has the highest ratio of visitors to residents (24.5, compared to the provincial average of 8.0). By this measurement, Kenora also has a high visitor number compared to its resident population of 12.5.

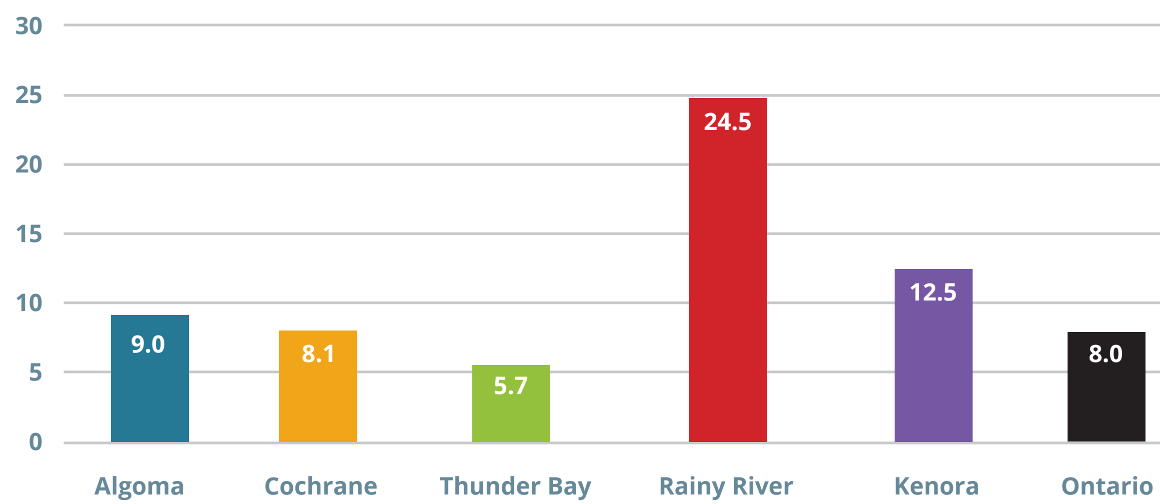
TABLE 2 Population and person-visit numbers and ratios, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora[3]

	Algoma	Cochrane	Thunder Bay	Rainy River	Kenora
Population	115,870	81,122	146,057	20,370	57,607
% of Ontario	0.9%	0.6%	1.1%	0.2%	0.4%
Person-visits	1,038,823	660,761	831,762	499,835	721,381
% of Ontario	1.0%	0.6%	0.8%	0.5%	0.7%
Person-visits/population	9.0	8.1	5.7	24.5	12.5

[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, Rainy River is particularly high with roughly 25 person-visits a year per resident. This is compared to roughly 9 person-visits per resident for the Algoma district and double that of the Kenora District. Thunder Bay has the fewest at just under 6 person-visits per resident.

CHART 2 Ratio of person-visits to resident population, Algoma, Cochrane, Thunder Bay, Rainy River, Kenora



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 2012, to visualize not only the highs and lows by season, but also the variability between years. It is important to note that some of that variability may be due to the smaller survey sample sizes, as well as the change in the tourism survey. The charts are scaled to the same format: 0 to 500,000 visitors.

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, Algoma, 2006-2012

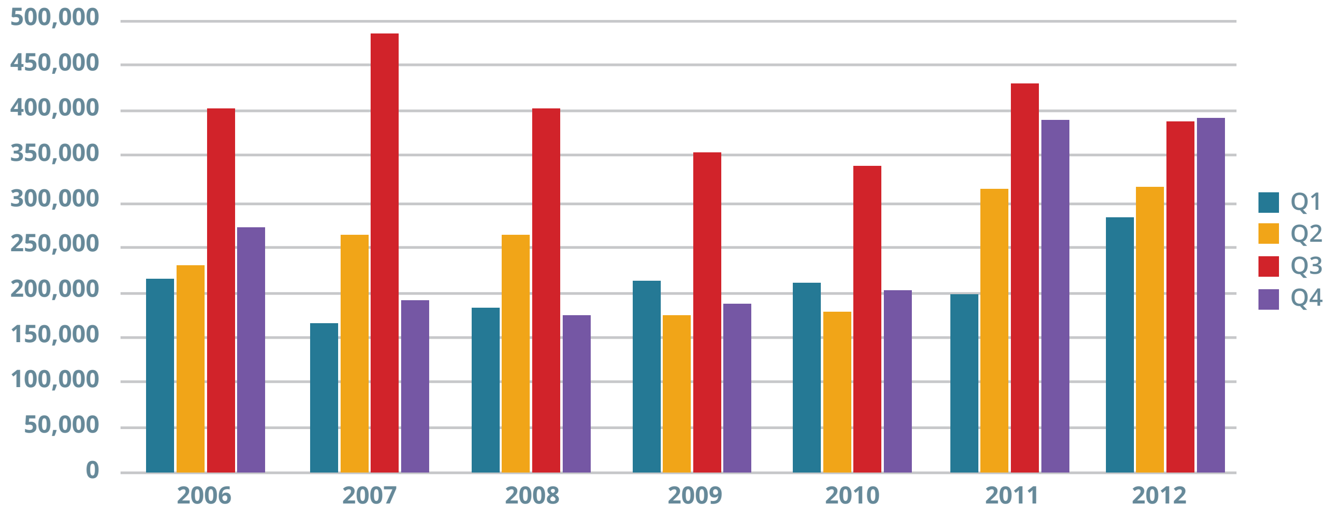


CHART 4 Seasonality of person-visits, Cochrane, 2006-2012

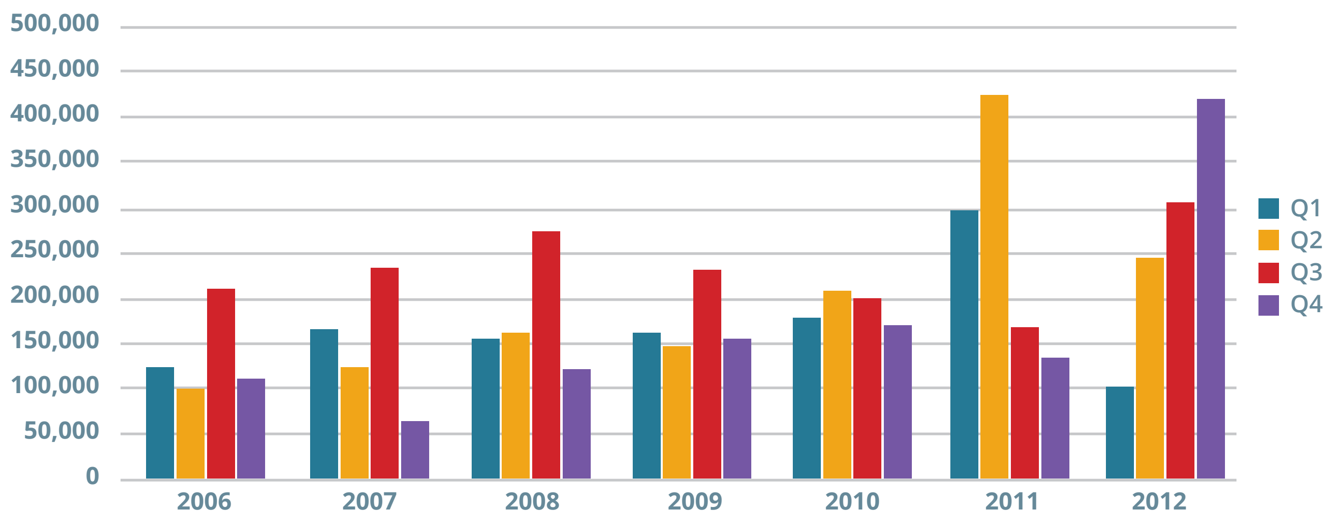


CHART 5 Seasonality of person-visits, Thunder Bay, 2006-2012

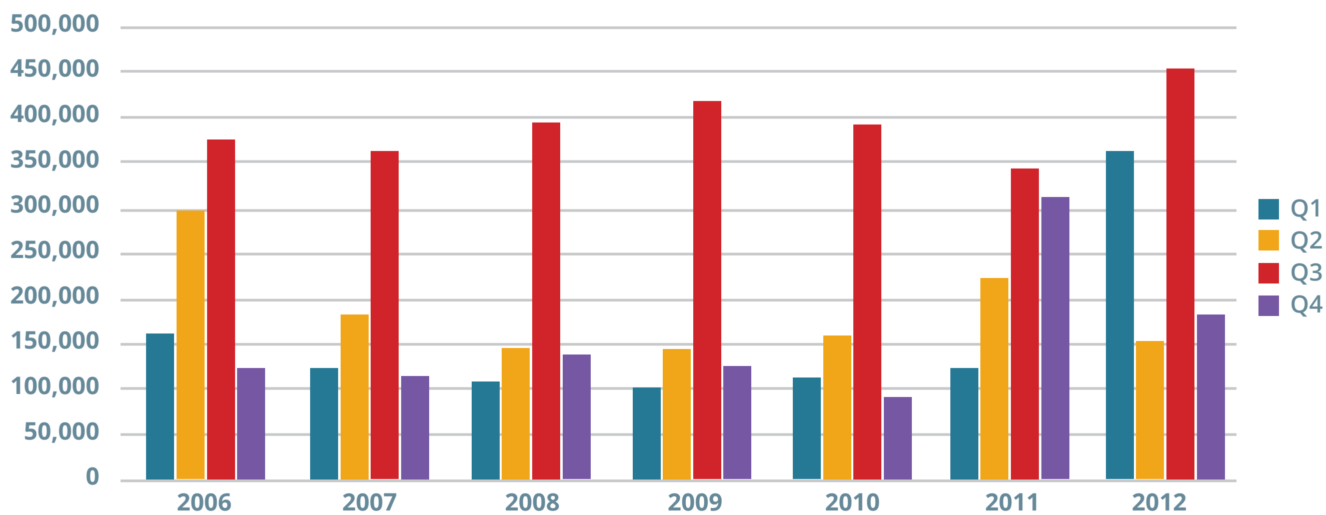


CHART 6 Seasonality of person-visits, Rainy River, 2006-2012

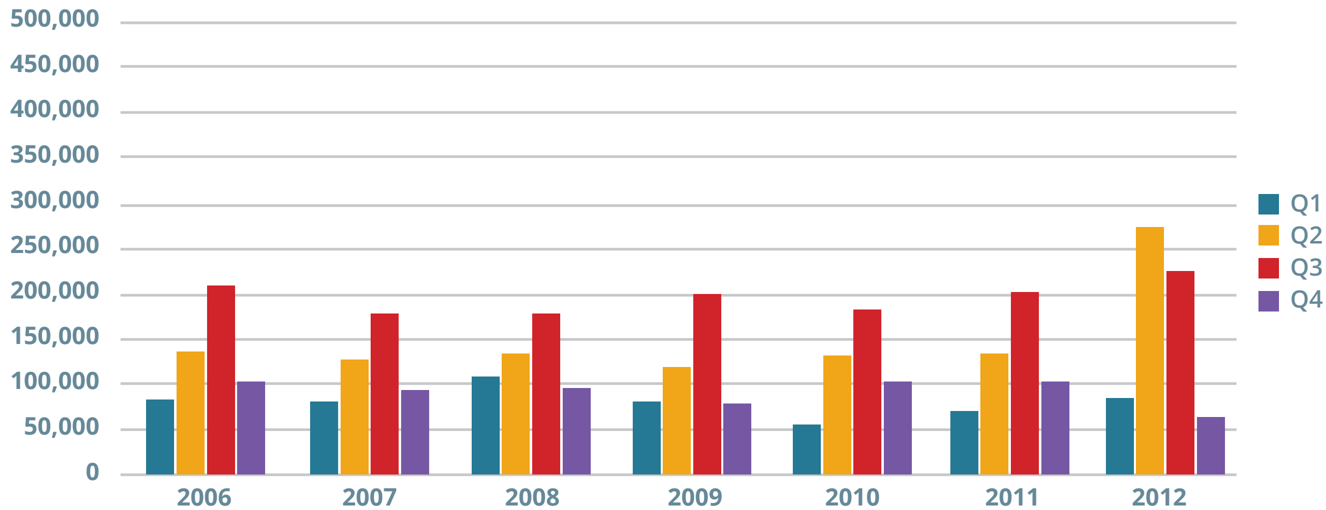
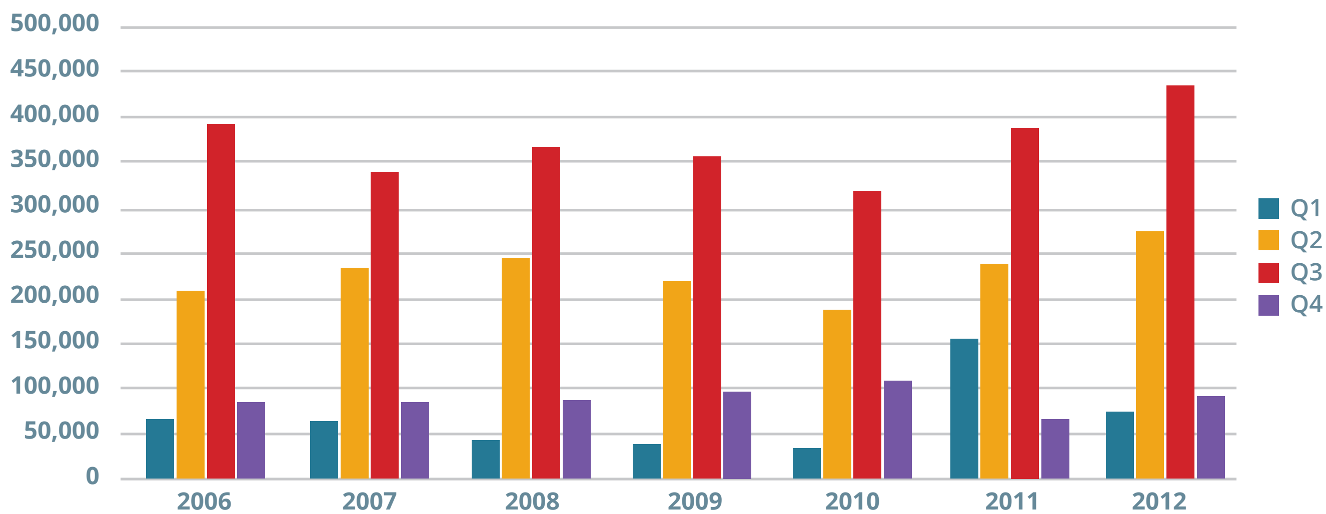


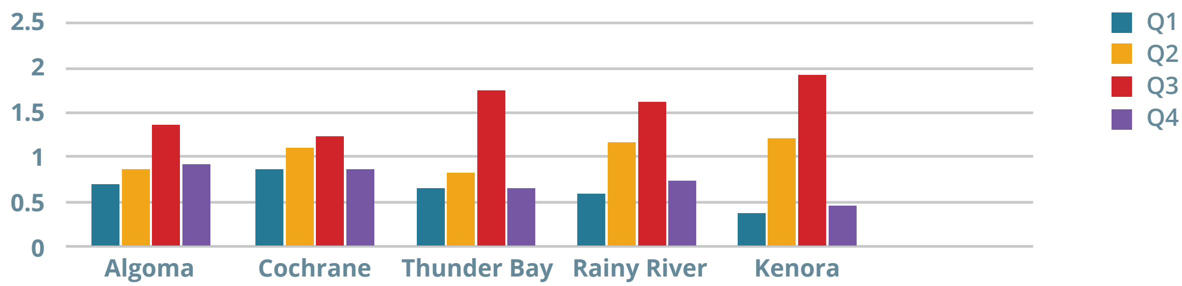
CHART 7 Seasonality of person-visits, Kenora, 2006-2012



It is apparent that there are significant variations between the 2006-2010 and 2011-2012 data for Algoma, Cochrane and Thunder Bay. There are noticeable differences in the number and relative volume of visitors by season between these two timeframes. To a lesser extent, the same can be said for the Rainy River data, where the second quarter data for 2012 seems at odds with the pattern for the previous years. Only in the case of Kenora could one say that the relative volume for each quarter seems to follow much the same pattern.

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 8. The calculation combines the disparate data for 2006-2010 and 2011-2012.

CHART 8 Ratio of seasonality of visitors, Algoma, Cochrane, Thunder Bay, Rainy River, Kenora, 2006-2010



Expressed through these ratios, it is clear that Kenora has by far the greatest degree of seasonality to its person-visit profile. This is suggested by the number of visitors in Quarter 3 being almost twice as high as the average for all quarters, and the figures for Quarters 1 and 4 being less than half that of the average quarterly number. Thunder Bay, followed by Rainy River, have the next greatest spread of seasonality, while Cochrane displays very limited seasonality across its four quarters.

Origin and Purpose of Visits

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

TABLE 3 Population and person-visit numbers and ratios, Algoma, Cochrane, Thunder Bay, Rainy River, Kenora[3]

	ALGOMA		TOP FIVE ORIGINS OF VISITS FOR ALGOMA				
	Canada	Ontario	Algoma	Michigan	Sudbury Region	Toronto	Simcoe
Number	721,014	692,515	288,338	242,467	68,109	48,348	28,143
Percent	64%	61%	25%	21%	6%	4%	3%
	COCHRANE		**TOP FIVE ORIGINS OF VISITS FOR COCHRANE**				
	Canada	Ontario	Cochrane	Sudbury Region	Timiskaming	Simcoe	Thunder Bay
Number	759,053	738,940	587,439	31,799	13,245	11,044	10,913
Percent	98%	96%	76%	4%	2%	1%	1%
	THUNDER BAY		**TOP FIVE ORIGINS OF VISITS FOR THUNDER BAY**				
	Canada	Ontario	Thunder Bay	Rainy River	Toronto	Manitoba	Algoma
Number	727,089	669,488	441,256	107,665	22,318	19,566	13,044
Percent	81%	74%	49%	12%	3%	2%	1%
	RAINY RIVER		**TOP FIVE ORIGINS OF VISITS FOR RAINY RIVER**				
	Canada	Ontario	Minnesota	Rainy River	Manitoba	Thunder Bay	Wisconsin
Number	248,886	198,372	171,544	137,266	45,856	36,846	21,678
Percent	49%	39%	34%	27%	9%	7%	4%
	KENORA		**TOP FIVE ORIGINS OF VISITS FOR KENORA**				
	Canada	Ontario	Manitoba	Minnesota	Kenora	Thunder Bay	Toronto
Number	534,819	213,784	294,339	78,546	58,103	43,077	40,665
Percent	70%	28%	39%	10%	8%	6%	5%

Each of these districts has its own unique pattern of where its visitors come from. In the case of Cochrane, on average three-quarters (76%) of the visitors come from within the district compared to Kenora, where only 8% come from within the district. Rainy River also has fewer of its visitors coming from within the district, with 27% from Rainy River. In the case of Kenora and Rainy River, large numbers of visitors come from outside Ontario. Algoma also attracts around 21% of its visitors from Michigan.

These larger number of visitors come from adjoining areas. Toronto and Simcoe to a lesser extent, still are included in several of the districts' top five origins of visitors. 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 response categories. Tables 4a and 4b provide the percentage responses averaged for 2006 to 2010 and for 2011 to 2012.

There are some differences between the figures for 2006-2010 and for 2011-2012. In every instance, the proportion of trips for business reasons rose. For personal related trips, there was a shift from pleasure only to visiting friends or relatives. This is likely due to different wording in the survey questions.

TABLE 4a Purpose of visit, average for 2006-2010 and 2011-2012, Algoma, Cochrane and Thunder Bay

	ALGOMA		COCHRANE		THUNDER BAY	
	2006/10	2011/12	2006/10	2011/12	2006/10	2011/12
PERSONAL	96%	92%	93%	84%	95%	84%
Pleasure	60%	46%	45%	30%	56%	44%
Friends/relatives	27%	39%	36%	40%	27%	30%
Shopping		1%		8%		1%
Conventions		0%		0%		0%
Other personal	10%	7%	12%	7%	12%	9%
BUSINESS	4%	8%	7%	16%	6%	16%
Meetings	1%	1%	0%	0%	1%	0%
Conventions	2%	2%	3%	2%	2%	2%
Other business	2%	5%	4%	13%	3%	15%

TABLE 4b Purpose of visit, average for 2006-2010 and 2011-2012, Rainy River and Kenora

	RAINY RIVER		KENORA	
	2006/10	2011/12	2006/10	2011/12
PERSONAL	97%	93%	97%	94%
Pleasure	55%	48%	70%	59%
Friends/relatives	27%	32%	23%	33%
Shopping		0%		0%
Conventions		1%		1%
Other personal	14%	14%	4%	1%
BUSINESS	3%	7%	3%	6%
Meetings	2%	2%	0%	0%
Conventions	0%	0%	1%	0%
Other business	1%	5%	2%	6%

Overall, in all areas profiled, personal reasons are the purpose of the vast majority of visits. Cochrane and Thunder Bay have the highest proportion of business visits, each at 16% for 2011-12, with the other three districts coming in between 6-8%. In most instances, visits for pleasure outnumber visits for visiting friends or relatives, except in the case of Cochrane. Kenora in particular has a high proportion of visits due to pleasure.

Visitor Activities

The tourist data provides figures for what activities visitors 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 discrepancies 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 percentage figure is a percentage of all person-visits, not a percentage of all those reporting an activity.

TABLE 5 Visitor activities, average distribution for 2007-2012, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora

	ALGOMA	COCHRANE	THUNDER BAY	RAINY RIVER	KENORA
RESPONSE RATE	81%	39%	80%	61%	96%
Festivals/Fairs	2%	1%	4%	2%	2%
Cultural Performances	3%	1%	3%	1%	3%
Museums/Art Galleries	7%	2%	4%	2%	4%
Zoos/Aquariums/Botanical Gardens	1%	1%	2%	0%	1%
Sports Events	4%	5%	3%	1%	2%
Casinos	7%	0%	2%	1%	1%
Theme Parks	1%	1%	1%	0%	1%
National/Provincial Nature Parks	14%	3%	13%	6%	10%
Historic Sites	11%	2%	9%	5%	6%
Any Outdoor/Sports Activity	31%	24%	39%	44%	65%
Boating	11%	5%	11%	19%	31%
Golfing	2%	2%	2%	1%	3%
Fishing	12%	6%	19%	32%	40%
Hunting	1%	4%	5%	2%	2%
Downhill Skiing/ Snowboarding	3%	1%	2%	1%	2%

In almost every instance, outdoor activities account for the largest proportion of activities. However, there is a range indicating that 65% of visitors to Kenora cite an outdoor activity, compared to 24% for Cochrane and 31% for Algoma.

For many activities, there seems to be a common range of visitors citing that activity. For example visits to historic sites fall between 2-11% and visits to nature parks is between 3-14%.

The same applies to many outdoor activities, such as golfing, hunting, downhill skiing and snowboarding. The largest variations are to be found among the degree of boating and fishing, with Cochrane at the lowest end and Kenora at the highest end.

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. Table 6 presents the data averaged for the years 2007 to 2012. Using the average of multiple years smooths out variations that are a consequence of a smaller sample size for one year.

TABLE 6 Percentage of all visits that stay overnight and average nights of overnight visits, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, average of 2007-2012

	ALGOMA	COCHRANE	THUNDER BAY	RAINY RIVER	KENORA
Percent of visits that are overnight	50%	36%	55%	48%	77%
Average nights of overnight visits	3.6	3.4	3.6	3.9	4.2

Kenora has a significantly higher proportion of visits that are overnight visits at 77%. Furthermore, Kenora has longer average stays which account for 4.2 nights for each overnight stay. At the other extreme, Cochrane only has 36% of its visits resulting in an overnight stay, with a shorter average of 3.4 nights per overnight stay. Algoma, Thunder Bay and Rainy River occupy the mid-range, both in terms of the percentage of visits that stay overnight and the average length of each overnight stay.

Table 7 presents the percentage breakdown by select accommodation types for overnight stays for each of the districts, relying on average numbers covering 2007 to 2012.

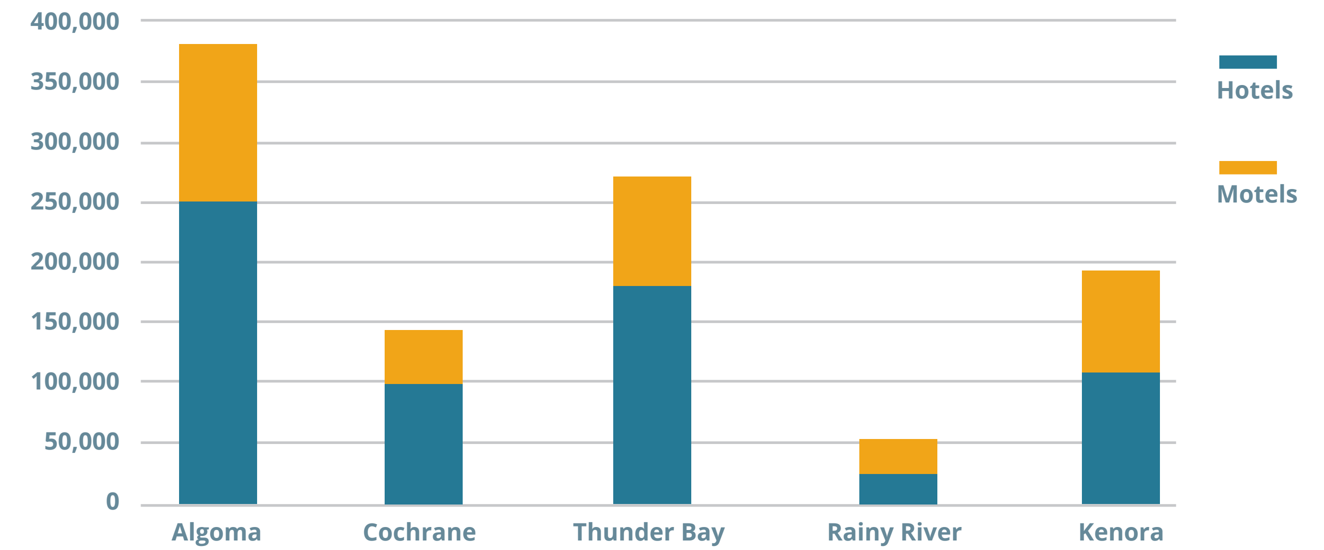
TABLE 7 Percentage of overnight stays by accommodation type by overnight visitors, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, average of 2007-2012

	ALGOMA	COCHRANE	THUNDER BAY	RAINY RIVER	KENORA
Hotels	12%	10%	11%	3%	4%
Motels	6%	4%	5%	3%	3%
Commercial cottage/cabins	7%	2%	8%	22%	33%
Camping/RV facilities	9%	7%	13%	14%	6%
Private homes	37%	51%	39%	17%	16%
Private cottages	23%	14%	14%	30%	26%

A considerably higher proportion of visitors staying overnight do so in private homes in Algoma, Cochrane and Thunder Bay. The highest proportion of overnight stays in private cottages is registered in Rainy River, followed by Cochrane and Algoma. Algoma, Cochrane and Thunder Bay have a higher proportion of overnight stays relying on hotels, and a slightly higher proportion using motels. Rainy River and Kenora have a much higher proportion using commercial cottages or cabins.

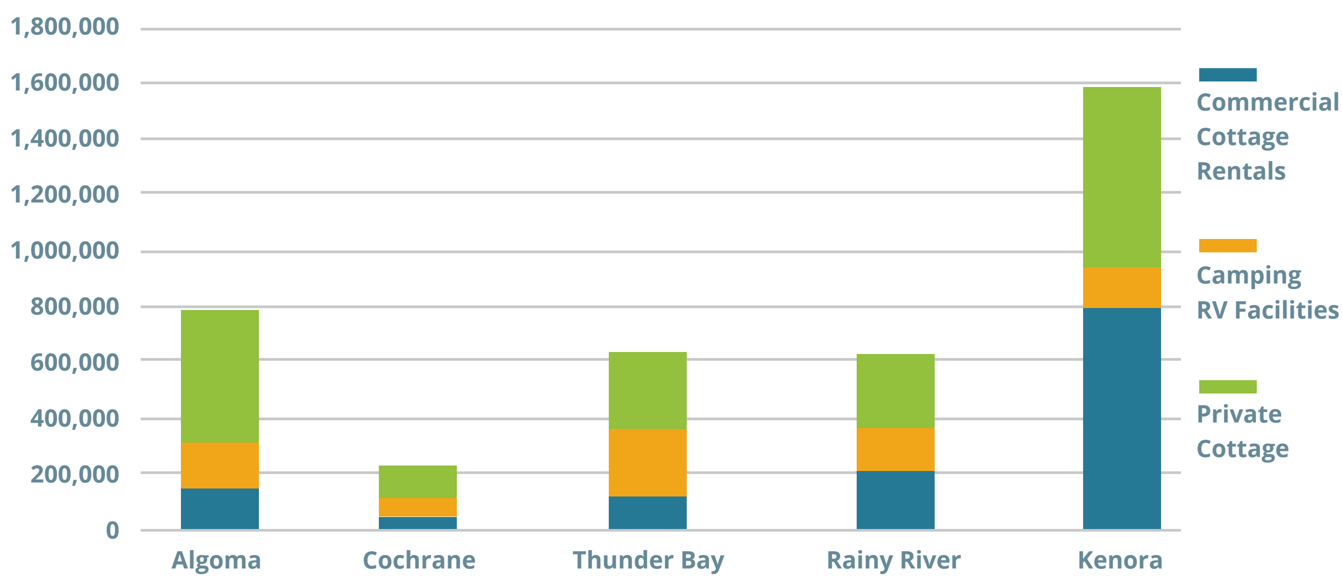
Comparing the actual number of overnight stays by accommodation type provides a sense of the scale of the types of different accommodations based on the average annual number for the period 2007-2012.

CHART 9 Number of overnight stays by hotels and motels by overnight visitors, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2007-2012



In terms of actual overnight stays, Algoma leads in both categories for the number of overnights in hotels or motels. Thunder Bay is a strong second in the hotel category. Thunder Bay and Kenora are tied for second place in the motel category.

CHART 10 Number of overnight stays by commercial cottages and cabins, campgrounds and RV facilities, and private cottages by overnight visitors, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2007-2012



There are a few observations related to Chart 9. Chart 9 has a larger scale of numbers, with the left vertical axis reaching 1,800,000 overnight visits, compared to Chart 8, where the highest figure is just slightly over 400,000.

In addition, it is important to note that Kenora out-paces all of the other areas in the categories of commercial cottages/cabins and overnight stays in private cottages. Thunder Bay has the largest number of overnight stays in campgrounds and RV facilities.

SUMMARY FOR TOURISM ACTIVITY

- Algoma has the highest number of visitors per year with 2012 at 1.4 million. Thunder Bay, Cochrane and Kenora range from 0.9 to 1.2 million and Rainy River had 0.6 million.
- Due to Rainy River's considerably smaller population, it has the highest ratio of visitors to residents at 24.5, compared to the provincial average at 8.0. By this measurement, Kenora also has a high visitor number compared to its resident population at 12.5. Algoma - 9.0 and Cochrane - 8.1 are close to the provincial average with Thunder Bay at a lower ratio of 5.7.
- Kenora has the greatest degree of seasonality to its person-visit profile, with the number of visitors in Quarter 3 (July, August, September) almost twice as high as the average for all quarters. The figures for Quarters 1 (January, February, March) and Quarter 4 (October, November, December) was less than half that of the average quarterly number. Thunder Bay, followed by Rainy River, have the next greatest spread of seasonality. Cochrane displays very limited seasonality across its four quarters. Algoma also has less seasonality, although it still has a pronounced high season in Quarter 3.
- Approximately three-quarters of Cochrane's visitors come from within the district compared to Kenora, where only 8% come from within the district. Rainy River also has fewer of its visitors coming from within the district, with 27% from Rainy River. In the case of Kenora and Rainy River, large numbers of visitors come from outside Ontario. Algoma also attracts around 21% of its visitors from Michigan.
- Personal reasons are the purpose of the vast majority of visits. Cochrane and Thunder Bay have the highest proportion of business visits, each at 16% for 2011-12, with the other three districts ranging between 6-8%.
- In every instance, outdoor activities account for the largest proportion of activities engaged in by visitors. A range exists with 65% of visitors to Kenora citing an outdoor activity, compared to 24% for Cochrane and 31% for Algoma. The largest variations in outdoor activities centre on the degree of boating and fishing, with Cochrane at the lowest end and Kenora at the highest end.
- Kenora stands out for having a significantly higher proportion of visits that are overnight visits at 77%. In addition, Kenora has longer average stays at 4.2 nights for each overnight stay. Cochrane only has 36% of its visits resulting in an overnight stay, and these stay a shorter average of 3.4 nights per overnight stay. Algoma, Thunder Bay and Rainy River occupy the mid-range, both in terms of the percentage of visits that stay overnight and the average length of each overnight stay.
- A higher proportion of visitors staying overnight do so in private homes in Algoma, Cochrane and Thunder Bay. The highest proportion of overnight stays in private cottages is registered in Rainy River, followed by Cochrane and Algoma. Algoma, Cochrane and Thunder Bay have a higher proportion of their overnight stays relying on hotels, and a slightly higher proportion using motels. Rainy River and Kenora have a much higher proportion using commercial cottages or cabins.
- In terms of actual numbers of overnight stays, Algoma leads in overnight stays in hotels or motels, with Thunder Bay a strong second in the hotel category. Thunder Bay and Kenora are tied for second place in the motel category.
- Kenora out-paces all of the other areas in the categories of commercial cottages or cabins, as well as overnight stays in private cottages. Thunder Bay has the largest number of overnight stays in campgrounds and RV facilities.

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, 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

The following tables, 8a to 8e, list the number of establishments for each of the five areas, as of June 2014. The industry categories represent the 3-digit level of detail.

TABLE 8a Number of establishments in tourism sector, Algoma, June 2014

↓ sub-sector/ employee size →	0	1-4	5-19	20-99	100+	TOTAL	%
Performing Arts, Spectator Sports	14	6	4	0	0	24	5%
Heritage Institutions	1	1	3	0	0	5	1%
Amusement, Recreation Industries	36	16	22	6	2	82	15%
Accommodation Services	74	39	36	9	1	159	30%
Food Services and Drinking Places	52	33	120	53	3	261	49%
Total by employee size	177	95	185	68	6	531	100%
Percent by employee size	33%	18%	35%	13%	1%	100%	

TABLE 8b Number of establishments in tourism sector, Cochrane, June 2014

↓ sub-sector/ employee size →	0	1-4	5-19	20-99	100+	TOTAL	%
Performing Arts, Spectator Sports	8	0	2	0	0	10	3%
Heritage Institutions	1	1	0	0	0	2	1%
Amusement, Recreation Industries	23	12	15	5	0	55	16%
Accommodation Services	34	16	20	11	0	81	24%
Food Services and Drinking Places	34	32	97	27	3	193	57%
Total by employee size	100	61	134	43	3	341	100%
Percent by employee size	29%	18%	39%	13%	1%	100%	

[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 under-counting in a category such as bed & breakfast operators.

TABLE 8c Number of establishments in tourism sector, Thunder Bay, June 2014

↓ sub-sector/ employee size →	0	1-4	5-19	20-99	100+	TOTAL	%
Performing Arts, Spectator Sports	26	9	6	3	0	44	7%
Heritage Institutions	2	3	4	0	0	9	1%
Amusement, Recreation Industries	36	12	24	10	1	83	13%
Accommodation Services	82	56	35	13	3	189	29%
Food Services and Drinking Places	57	49	135	84	1	326	50%
Total by employee size	203	129	204	110	5	651	100%
Percent by employee size	31%	20%	31%	17%	1%	100%	

TABLE 8d Number of establishments in tourism sector, Rainy River, June 2014

↓ sub-sector/ employee size →	0	1-4	5-19	20-99	100+	TOTAL	%
Performing Arts, Spectator Sports	4	0	0	0	0	4	3%
Heritage Institutions	0	0	1	0	0	1	1%
Amusement, Recreation Industries	8	5	6	0	0	19	13%
Accommodation Services	32	31	15	5	0	83	57%
Food Services and Drinking Places	8	10	17	4	0	39	27%
Total by employee size	52	46	39	9	0	146	100%
Percent by employee size	36%	32%	27%	6%	0%	100%	

TABLE 8e Number of establishments in tourism sector, Thunder Bay, June 2014

↓ sub-sector/ employee size →	0	1-4	5-19	20-99	100+	TOTAL	%
Performing Arts, Spectator Sports	6	5	1	0	0	12	2%
Heritage Institutions	0	2	3	0	0	5	1%
Amusement, Recreation Industries	15	12	13	8	0	48	9%
Accommodation Services	155	100	83	25	0	363	67%
Food Services and Drinking Places	25	14	51	27	1	118	22%
Total by employee size	201	133	151	60	1	546	100%
Percent by employee size	37%	24%	28%	11%	0%	100%	

Some observations drawn from tables 8a-8e:

- On average, roughly a third of all these establishments have no employees;
- Close to another third have 5-19 employees.
- The districts with the highest number of large establishments are Algoma (6 establishments) and Thunder Bay (5 establishments).
- By far, the greatest number of establishments are found in the Accommodation Services and in the Food Services and Drinking Places sectors.
- In the case of Algoma, Cochrane and Thunder Bay, approximately 50% of all tourism establishments are in the Food Services and Drinking Places sector. In the case of Rainy River and Kenora, approximately 60% of the tourism establishments are found among Accommodation Services.
- Thunder Bay has over 300 Food Services and Drinking Places establishments, while Kenora has over 300 Accommodation Services establishments.

The next set of tables highlight 6-digit Canadian industry categories, listing only those categories where there are at least 10 establishments for each range.

TABLE 9a Number of establishments in select tourism categories, Algoma, June 2014

	0	1-4	5-19	20-99	100+	TOTAL
713940 - Fitness and recreational sports centres	10	4	4	2	0	20
713990 - All other amusement and recreation	18	7	7	1	0	33
721111 - Hotels	5	5	5	4	1	20
721113 - Resorts	5	4	3	0	0	12
721114 - Motels	18	6	13	1	0	38
721192 - Housekeeping cottages and cabins	8	5	3	0	0	16
721211 - RV parks and campgrounds	10	5	1	0	0	16
721212 - Hunting and fishing camps	18	8	6	2	0	34
721213 - Recreational and vacation camps	7	1	3	0	0	11
722410 - Drinking places (alcoholic beverages)	7	0	11	2	0	20
722511 - Full-service restaurants	21	16	62	26	0	125
722512 - Limited-service eating places	16	12	36	21	4	89

For Algoma, the largest number of establishments at this level of detail is found among full-service restaurants, followed by limited-service eating places. Among accommodation services, motels rank first, followed by hunting and fishing camps. However, hotels register a far larger number of overnight stays.

TABLE 9b Number of establishments in select tourism categories, Cochrane, June 2014

	0	1-4	5-19	20-99	100+	TOTAL
713910 - Golf courses and country clubs	2	0	6	2	0	10
713990 - All other amusement and recreation	16	10	3	1	0	30
721111 - Hotels	2	3	4	6	0	15
721114 - Motels	3	3	8	2	0	16
721211 - RV parks and campgrounds	8	2	2	0	0	12
721212 - Hunting and fishing camps	4	3	3	0	0	10
722410 - Drinking places (alcoholic beverages)	2	4	10	0	0	16
722511 - Full-service restaurants	15	11	39	14	1	80
722512 - Limited-service eating places	10	10	33	12	2	67

In Cochrane, full-service restaurants, followed by limited-service eating places lead the numbers. There are roughly an equal number of motels and hotels.

TABLE 9c Number of establishments in select tourism categories, Thunder Bay, June 2014

	0	1-4	5-19	20-99	100+	TOTAL
711130 - Musical groups and artists	9	0	1	0	0	10
713910 - Golf courses and country clubs	1	2	7	3	0	13
713940 - Fitness and recreational sports centres	7	1	8	1	1	18
713990 - All other amusement and recreation	20	4	7	1	0	32
721111 - Hotels	4	7	9	7	3	30
721113 - Resorts	10	4	1	0	0	15
721114 - Motels	10	17	12	1	0	40
721192 - Housekeeping cottages and cabins	5	4	2	0	0	11
721211 - RV parks and campgrounds	8	5	0	0	0	13
721212 - Hunting and fishing camps	29	15	7	2	0	53
722410 - Drinking places (alcoholic beverages)	2	2	7	4	0	15
722511 - Full-service restaurants	22	26	63	42	0	153
722512 - Limited-service eating places	26	15	53	40	1	135

In Thunder Bay, the same pattern applies in terms of the largest number of establishments. Full-service restaurants, followed by limited-service eating places. The next largest number of establishments is within hunting and fishing camps.

TABLE 9d Number of establishments in select tourism categories, Rainy River, June 2014

	0	1-4	5-19	20-99	100+	TOTAL
721192 - Housekeeping cottages and cabins	4	7	2	1	0	14
721212 - Hunting and fishing camps	12	12	10	0	0	34
722511 - Full-service restaurants	5	5	6	1	0	17
722512 - Limited-service eating places	2	1	8	3	0	14

Rainy River has far fewer establishments in the tourism sector, and only four categories where the number of establishments is 10 or more. Hunting and fishing camps is the category with the most number of establishments.

TABLE 9e Number of establishments in select tourism categories, Kenora, June 2014

	0	1-4	5-19	20-99	100+	TOTAL
713930 - Marinas	3	2	5	0	0	10
713990 - All other amusement and recreation	8	6	3	1	0	18
721111 - Hotels	4	3	3	9	0	19
721112 - Motor hotels	2	2	3	5	0	12
721113 - Resorts	11	10	3	0	0	24
721114 - Motels	7	6	7	3	0	23
721192 - Housekeeping cottages and cabins	16	17	10	1	0	44
721211 - RV parks and campgrounds	11	8	4	0	0	23
721212 - Hunting and fishing camps	75	39	43	7	0	164
721213 - Recreational and vacation camps	20	10	7	0	0	37
722511 - Full-service restaurants	13	8	27	10	1	59
722512 - Limited-service eating places	9	4	16	14	0	43

In Kenora, hunting and fishing camps is also the category with the most number of establishments. At 164, this is far more than any of the other districts, however almost half of these have no employees. It is assumed that these are solo operations. Kenora has its share of eating establishments, but compared to elsewhere, it also has a high number of housekeeping cottages and cabins.

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. Concerns have been raised regarding both the accuracy of the data and the degree its results can be compared to the 2006 data. 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. It also represents 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 reduced by occupation and by industry, the result can be a rather low 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 (e.g. entries between 1 and 9) there is a good chance that many of the results will end up being "0".** Thus, in a smaller community such as Rainy River, 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.

With respect to 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 10, 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% of all of these jobs, and restaurant managers make up a further 8%.

TABLE 10 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, 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 Rainy River 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 11 provides two sets of data. Firstly, employment of residents by district for all industries and the tourism sector industries. Secondly, by actual jobs present in the districts. Local jobs can only be represented by jobs that have a fixed workplace. For example, construction jobs move from location to location, but most jobs in the tourism industry do have a fixed workplace. Also, in the case of Northern Ontario, there is very limited commuting that crosses district boundaries, and so there is a fair degree of equivalence between the resident employment numbers and the local jobs numbers.

TABLE 11: Tourism labour force data, employed residents and jobs with usual place of work, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2011

	ALL EMPLOYED RESIDENTS			ALL JOBS WITH USUAL PLACE OF WORK		
	ALL INDUSTRIES	TOURISM SECTOR	TOURISM AS % OF TOTAL	ALL INDUSTRIES	TOURISM SECTOR	TOURISM AS % OF TOTAL
ALGOMA	49,420	4,780	9.7%	43,925	4,630	10.5%
COCHRANE	36,615	2,440	6.7%	33,125	2,290	6.9%
THUNDER BAY	67,975	6,025	8.9%	60,095	5,900	9.8%
RAINY RIVER	8,935	730	8.2%	8,130	730	9.0%
KENORA	25,055	2,075	8.3%	21,500	2,000	9.3%

In Ontario, tourism represents 8.0% of all jobs, and so, by comparison, most of these districts rely more on tourism for employment, with the exception of Cochrane at 6.9%. The percentage share of residents employed in tourism is slightly less because the figure for all employment is slightly higher, including those jobs that do not have a fixed workplace.

Table 12 lists the jobs present in each district by tourism sub-sector.

TABLE 12: Number of local tourism jobs by sub-sectors, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2011

	711 Performing arts, sports	712 Heritage Institutions	713 Amusement, recreation	7211 Traveller accommodations	7212 RV parks & rec camps	7221 Full-service restaurants	7222 Limited-service restaurants	7224 Drinking places
ALGOMA	115	55	1250	570	105	915	1550	70
COCHRANE	35	10	210	415	40	615	940	25
THUNDER BAY	175	200	915	1040	45	1515	1815	195
RAINY RIVER	0	0	85	280	70	130	165	0
KENORA	10	40	205	515	190	445	595	0

Despite that the establishment data shows that there are more full-service restaurants than limited-service eating places, in every instance there is more employment among limited-service eating places.

Table 13 provides the same information but expresses it in percentage terms, to highlight the distribution of jobs across the various tourism sub-sector. It also compares it to the Ontario figures. In most instances, limited-service eating places account for the largest proportion of employment. This includes Cochrane with a high of 41% of all tourism jobs. However, in Rainy River traveller accommodation jobs ranks first at 38% of jobs. In Kenora, the proportions are close. Limited-service eating places are 30% and traveller accommodation is at 26%. Meanwhile, Algoma has a high proportion of its tourism jobs found in amusement, gambling and recreation industries at 27%. This is considerably higher than the other districts. On the other hand, Rainy River and Kenora have higher proportions of the tourism jobs found in Recreational Vehicle (RV) Parks and Recreational Camps.

TABLE 13 Percentage distribution of local tourism jobs by sub-sectors, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2011

	711 Performing arts, sports	712 Heritage institutions	713 Amusement, recreation	7211 Traveller 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%
ALGOMA	3%	1%	27%	12%	2%	20%	34%	2%
COCHRANE	2%	0%	9%	18%	2%	27%	41%	1%
THUNDER BAY	3%	3%	16%	18%	1%	26%	31%	3%
RAINY RIVER	0%	0%	12%	38%	10%	18%	23%	0%
KENORA	1%	2%	10%	26%	10%	22%	30%	0%

The next set of tables cross-tabulate the data, by the main tourism sub-sectors 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. The final column shows the share of all tourism jobs held by the tourism jobs in that occupation.

TABLE 14 Jobs in tourism industries and occupations, Algoma, 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	43925	115	55	1250	570	105	915	1550	70	4630	
Restaurant managers	295	0	0	0	0	0	100	150	0	250	5.4%
Accommodation mgrs	135	0	0	0	65	30	0	0	0	95	2.1%
Professionals art/culture	255	65	15	0	0	0	0	0	0	80	1.7%
Program instructors	175	0	0	45	0	0	0	0	0	45	1.0%
Food service supervisors	105	0	0	0	0	0	20	65	0	85	1.8%
Chefs	75	0	0	0	0	0	45	0	0	45	1.0%
Cooks	630	0	0	0	15	0	210	225	0	450	9.7%
Hosts/hostesses	30	0	0	0	0	0	30	0	0	30	0.6%
Bartenders	85	0	0	0	0	0	15	0	50	65	1.4%
Food & beverage servers	460	0	0	20	10	0	375	0	10	415	9.0%
Hotel front desk clerks	75	0	0	0	80	0	0	0	0	80	1.7%
Cashiers	1115	0	0	40	0	0	0	140	0	180	3.9%
Food counter attendants	1235	0	0	15	0	0	85	930	0	1030	22.2%
Light duty cleaners	710	0	0	35	235	0	0	0	0	270	5.8%
Janitors and caretakers	895	0	0	10	20	0	0	0	0	30	0.6%
Landscaping labourers	165	0	0	35	0	0	0	0	0	35	0.8%

Thus, in the case of Algoma, the proportion of tourism jobs held by the top three occupations matches the provincial figures:

- Food counter attendants (Algoma – 22.2%; Ontario – 20.2%)
- Cooks (Algoma – 9.7%; Ontario – 9.6%)
- Food and beverage servers (Algoma – 9.0%; Ontario – 11.2%).

By comparison, Algoma has somewhat smaller percentages of restaurant and food services managers, program leaders in recreation, and chefs.

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

In Cochrane, jobs among food service occupations account for a higher proportion of all tourism sector jobs, notably among food counter attendants, cooks, food service supervisors and restaurant manager. There is a lower proportion of food and beverage servers and chefs. As well, Cochrane has a higher proportion of hotel front desk clerks and light duty cleaners.

TABLE 16 Jobs in tourism industries and occupations, Thunder Bay, 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	60095	175	200	915	1040	45	1515	1815	195	5900	
Restaurant managers	475	0	0	0	15	0	190	230	0	435	7.4%
Accommodation mgrs	125	0	0	0	50	40	0	0	0	90	1.5%
Professional art/culture	450	75	0	0	0	0	0	0	0	75	1.3%
Program instructors	215	0	0	85	0	0	0	0	0	85	1.4%
Food service supervisor	155	0	0	0	0	0	20	80	0	100	1.7%
Chefs	120	0	0	0	25	0	25	0	0	50	0.8%
Cooks	1110	0	0	0	65	0	375	265	0	705	11.9%
Hosts/hostesses	70	0	0	0	0	0	60	0	0	60	1.0%
Bartenders	225	0	0	0	0	0	100	0	90	190	3.2%
Food &beverage servers	720	0	0	15	125	0	470	0	0	610	10.3%
Hotel front desk clerks	230	0	0	0	230	0	0	0	0	230	3.9%
Cashiers	1165	0	0	50	0	0	0	110	0	160	2.7%
Food counter attendant	1660	0	0	20	35	0	210	945	0	1210	20.5%
Light duty cleaners	985	0	0	45	320	0	0	30	0	395	6.7%
Janitors and caretakers	845	0	0	60	20	0	0	0	0	80	1.4%
Landscaping labourers	320	0	30	95	0	0	0	0	0	125	2.1%

Thunder Bay's distribution of occupations within the tourism sector is somewhat closer to that of Ontario than Algoma's, but with somewhat higher proportions of hotel front desk clerks and light duty cleaners, and fewer chefs.

TABLE 17 Jobs in tourism industries and occupations, Rainy River, 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	8130	0	0	85	280	70	130	165	0	730	
Restaurant managers	65	0	0	0	0	0	15	35	0	50	6.8%
Accommodation mgrs	70	0	0	0	50	15	0	0	0	65	8.9%
Professionals art/culture	70	0	0	0	0	0	0	0	0	0	0.0%
Program instructors	35	0	0	30	0	0	0	0	0	30	4.1%
Food service supervisors	40	0	0	0	0	0	35	0	0	35	4.8%
Chefs	0	0	0	0	0	0	0	0	0	0	0.0%
Cooks	70	0	0	0	0	0	20	10	0	30	4.1%
Hosts/hostesses	0	0	0	0	0	0	0	0	0	0	0.0%
Bartenders	45	0	0	0	0	0	0	0	0	0	0.0%
Food & beverage servers	25	0	0	0	0	0	15	0	0	15	2.1%
Hotel front desk clerks	20	0	0	0	25	0	0	0	0	25	3.4%
Cashiers	165	0	0	0	0	0	0	0	0	0	0.0%
Food counter attendants	165	0	0	0	0	0	0	100	0	100	13.7%
Light duty cleaners	155	0	0	0	50	0	0	0	0	50	6.8%
Janitors and caretakers	185	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%

Rainy River's much smaller workforce means that as the numbers are divided by occupation and by industry sub-sectors. This means that there are far more instances where the entries for a given cell are suppressed. The end result is an incomplete comparison. Of the five tables (Tables 15-19), Table 18 represents the most likely instance of unreliable data.

TABLE 18 Jobs in tourism industries and occupations, Kenora, 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	21500	10	40	205	515	190	445	595	0	2000	
Restaurant managers	105	0	0	0	0	0	25	50	0	75	3.8%
Accommodation mgrs	105	0	0	0	55	45	0	0	0	100	5.0%
Professionals art/culture	90	0	0	0	0	0	0	0	0	0	0.0%
Program instructors	70	0	0	20	0	0	0	0	0	20	1.0%
Food service supervisors	75	0	0	0	0	0	0	35	0	35	1.8%
Chefs	30	0	0	0	0	0	10	0	0	10	0.5%
Cooks	345	0	0	0	35	0	75	110	0	220	11.0%
Hosts/hostesses	30	0	0	0	0	0	30	0	0	30	1.5%
Bartenders	60	0	0	0	50	0	0	0	0	50	2.5%
Food & beverage servers	265	0	0	0	45	0	200	0	0	245	12.3%
Hotel front desk clerks	40	0	0	0	40	0	0	0	0	40	2.0%
Cashiers	665	0	0	10	0	0	0	85	0	95	4.8%
Food counter attendants	495	0	0	0	30	0	50	260	0	340	17.0%
Light duty cleaners	440	0	0	0	175	25	0	0	0	200	10.0%
Janitors and caretakers	485	0	0	0	15	0	0	0	0	15	0.8%
Landscaping labourers	155	0	0	0	0	20	0	0	0	20	1.0%

The workforce population for Kenora is also smaller, though not nearly as small as Rainy River. This results in a considerable number of cells with a “0” entry. By and large, however, the percentage distribution by occupations is within the range of the provincial averages.

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

The one age category where there tends to be more robust figures is in the 15-24 year olds. This is largely due to the fact that they make up the majority of workers for a number of occupations.

TABLE 19 Percentage of youth aged 15 to 24 years of age employed in select tourism occupations, Algoma, Cochrane, Thunder Bay, Rainy River and Kenora, 2011

	ONTARIO	ALGOMA	COCHRANE	THUNDER BAY	RAINY RIVER	KENORA
ALL OCCUPATIONS	13%	13%	13%	14%	12%	15%
Program instructors	57%	81%	63%	59%	71%	63%
Food service supervisors	38%	18%	0%	26%	75%	44%
Cooks	35%	51%	21%	34%	33%	33%
Hosts/hostesses	81%	0%	92%	93%	0%	0%
Bartenders	31%	33%	0%	31%	0%	0%
Food & beverage servers	46%	45%	44%	61%	55%	48%
Hotel front desk clerks	27%	0%	28%	26%	0%	25%
Cashiers	53%	49%	51%	61%	32%	44%
Food counter attendants	55%	57%	41%	60%	67%	44%
Landscaping labourers	41%	42%	35%	44%	50%	53%

Table 19 provides the data for all employed residents for the selected occupations across all industries, not just the tourism sector. Generally, youth aged 15-24 years of age tend to make up 12-15% of the employed workforce. However, among certain tourism occupations, they account for roughly 40-60% of the workforce. In the case of hosts and hostesses, there is a full 81% of all workers in that occupation in Ontario. Table 19 shows the figures for each district, where in most instances, the percentage of youth either equals or exceeds the provincial average.

WHY A LABOUR MARKET INITIATIVE?

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, migrant numbers modest 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 priorities 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 community 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 essential. 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.
[6] Ontario Tourism Education 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
- FedNor, Supporting partner
- Ministry of Tourism, Culture & Sport, Supporting partner

In addition to the sub-regional research studies, a customized database and Implementation Guidebook have been developed to serve as tools during the planning process. The database allows partners to run reports 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 Guidebook 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, focus groups and one-on-one interviews to highlight the direction and potential partnerships needed to strengthen workforce planning in Algoma/North Central and Northwest Ontario.

PURPOSE

The purpose of the Algoma/North Central and Northwest 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 approximately 50 key informants and representatives of industry groups representing a diverse spectrum of the five 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. Design and implementation of the 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 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 it relates 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 Project Team 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 1,200 tourism employers throughout Algoma/ North Central and Northwest Ontario. To maximize the potential response rate, a printed copy was handed out at ten consultation sessions held throughout the region.

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 100 telephone calls were made in an attempt to elicit greater response and to reiterate the case for participation. The survey was open for several months to allow time for follow up and 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 on average 16 minutes. Those who skipped questions due to inapplicable responses, took on average 12 minutes.

2. Limitations of the Northern Ontario 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. 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 133 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:

Algoma
Cochrane (entire district)
Rainy River
Kenora
Thunder Bay

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 is 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/confidence interval and 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 situations. 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 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 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 indicates those types of bias that are particularly relevant to the LMI surveys.

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 that may fall close to (or below) the sample size threshold. For example 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. 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 and national studies and statistics. The secondary information assisted in summarizing the labour market issues across Ontario and in bringing consistency to 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] (CHTRC) 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 is projected to experience a shortage of 7,010 jobs and recreation and entertainment is projected to experience 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

Over recent years, global economic conditions have not been favourable for the Canadian tourism industry. Weak economic performance in key source markets and the strength of the Canadian dollar has continued to impact visitor numbers. Over the last 24 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). Although the Canadian dollar has recently fallen, the global economy has not rebounded in any significant way which has 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 might 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).

In terms of the availability of international workers as an alternative labour source for tourism businesses, this 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 low proportion of businesses 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. Should this number increase, current regulations severely restrict the ability of these businesses to access international workers. As a result, international workers are 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 tourism workforce – both for 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 was sent to over 1,200 businesses and organizations spanning the districts of Algoma, Cochrane, Kenora, Rainy River and Thunder Bay.

EMPLOYER SURVEY FINDINGS

The labour market in Algoma/North Central and Northwest 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, 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.
- In line with the labour force pressures, the following priorities were identified:
    - Help finding entry-level staff;
    - Customer service training;
    - Pre-employment program identification; and
    - Seeking funding for training.

Overall employers indicated a willingness to partner with educational sector partners and other employers to address workforce issues. Approximately 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.

Recruitment and Retention

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

The top three most difficult positions to recruit for included:
- Light duty cleaners/room attendants/ janitors;
- Food counter attendants; and
- Kitchen helpers.

Four occupations are identified as both key occupations to local tourism establishments and for which tourism operators find it hard to recruit:
- Light duty cleaners/room attendants (identified as a key occupation by the second highest number of respondents and as having the highest hiring difficulty among entry level positions);
- Cooks;
- Facility operation /maintenance managers; and
- Senior administrative staff.

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 area residents.
- Businesses relied most heavily on post-secondary students or underemployed young workers, followed by mature aged workers when exploring new sources of labour to address deficiencies.
- Aboriginal populations, older workers, persons with disabilities and newcomers to Canada were not frequently cited as a source of new or alternative greater recruitment challenges overall than those with 1- 4 staff.
- Employers in the accommodation sector are more likely to desire help in finding entry-level and/or high turnover and/or seasonal staff.
- Compared to the Northeastern Ontario Tourism LMI Survey, this survey scored higher difficulty ratings for skilled tradespersons and small engine and equipment mechanics.
- The possibility of hosting a community college placement student garnered the highest interest of all student placement options.

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.

Overall, employers have the greatest interest in training for specific work-related functions followed by customer service.

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 Distribution of employers by tourism sectors (N=99)

SECTOR	NUMBER	PERCENT
Accommodation (Providing a place for visitors to stay overnight, e.g. hotel or RV park)	50	51%
Visitor Attractions & Activities (Providing visitors things to see or do, e.g. museum or golf course)	17	17%
Food & Beverage Services (Providing food or drinks to customers, e.g. restaurants or bars)	13	13%
Travel & Transportation (Providing transportation or making travel arrangements, e.g. tours or travel agents)	4	4%
Other (retail, info centres, district marketing organizations, municipalities)	15	15%
TOTAL	99	100%

Evidently, accommodation providers make up the largest share of respondents. Three other categories account for roughly equal amounts, this includes visitor attractions & activities, other and food & beverage servers.

A solid number of the respondents also indicated that their establishment typically fit into more than one category. Many accommodation providers also offered food services on-site or visitor activities. Hunting & fishing camps represent many sectors which includes making travel arrangements, providing a tour guide, providing accommodation, serving food, and connecting customers to activities, such as boating, fishing and hunting.

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)	14
Housekeeping Cottages and Cabins	6
Motels	3
Bed & Breakfast	2
Hunting and Fishing Camps	15
Recreational (except Hunting and Fishing) and Vacation Camps	5
Resorts	6
RV (Recreational Vehicle) Parks and Campgrounds	4
VISITOR ATTRACTIONS AND ACTIVITIES	
Heritage institutions (museums, arts galleries, historic and heritage sites)	7
Festivals and fairs	3
Outdoor activities (golf courses, skiing facilities, marinas, nature parks)	8
Other amusement and recreation industries (fitness and recreational centres, bowling centres, arcades, gambling industries and other such industries)	4
FOOD & BEVERAGE SERVICES	
Full-service restaurants (meals brought to a table, including alcohol)	13
Limited-service eating places (fast food counters)	1
TRAVEL & TRANSPORTATION	
Passenger transportation	1
Guides	2
Other travel arrangement and reservation services	5
OTHER	15

There are only three sub-categories where the number of respondents reaches double-digit figures:

- Hunting and fishing camps (15)
- Hotels (14)
- Full-service restaurants (13)

Overall, camps such as hunting and fishing camps, recreational and vacation camps or RV parks and campgrounds are prominent. This accounts for a quarter of all respondents.

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	47	43	46
5-19 employees	27	24	29
20-99 employees	17	9	9
100+ employees	0	0	1
TOTAL	91	76	85

Overall, the profile of respondents represents a large proportion of smaller operators. The results indicate that slightly over half have of respondents has a full-time complement of 1- 4 employees.

To provide a contextual comparison, Table 24 illustrates the percentage breakdown by number of employees of all establishments in arts, entertainment & recreation and in accommodation & food services sectors. The data represents Rainy River, Thunder Bay, Cochrane, Kenora and Algoma districts. The figures represent only those establishments with employees. There are many establishments that have no employees and are solo/ owner-operated. The percentage is compared to the percentage distribution of survey respondents by number of full-time employees.

TABLE 23 Distribution of establishments by number of employees, survey respondents and actual number, June 2014

	1-4 Employees	5-19 Employees	20-99 Employees	100+ Employees
Total number of establishments	464	713	290	15
Percentage distribution of establishments	31%	48%	20%	1%
Percentage distribution of survey respondents	52%	30%	19%	0%

The distribution of establishments by number of employees is much more weighted toward the 5-19 employee category, which represents almost half (48%) of all establishments where there are employees. There are very few large establishments, with only 15 across the five districts, representing 1% of all firms. Furthermore, the survey sample is weighted toward very small firms, and is under-represented by firms with 5-19 employees.

SURVEY ANALYSIS

Key occupations

Once the characteristics of the employer's 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 it represents a large portion of your workforce or because the success of your business greatly depends on this function 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 99 survey respondents is used.

CHART 11 Key occupations – managers

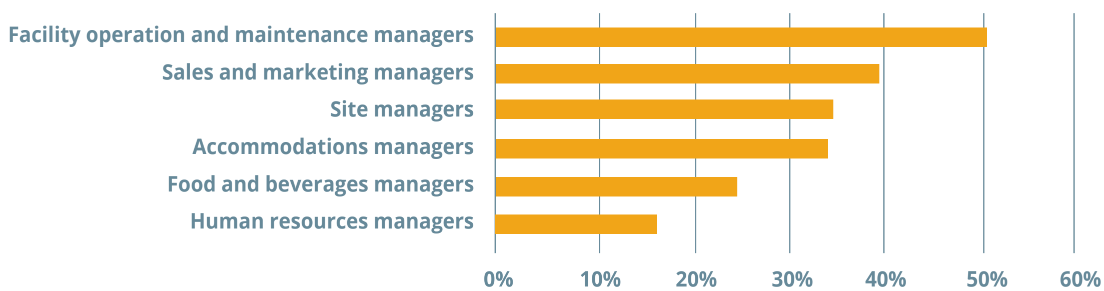


CHART 12 Key occupations – middle skill staff

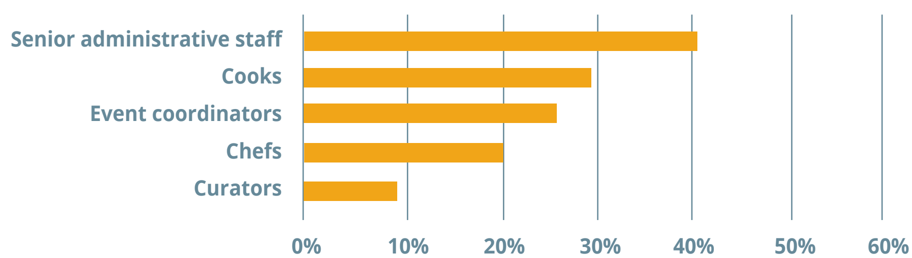


CHART 13 Key occupations – travel industry positions

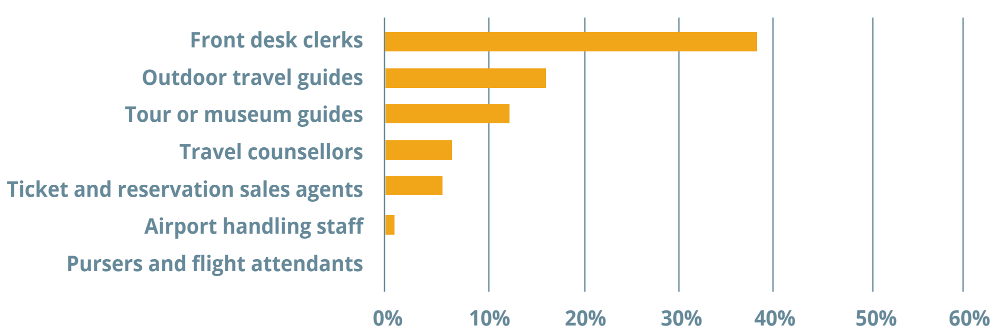


CHART 14 Key occupations – special skills

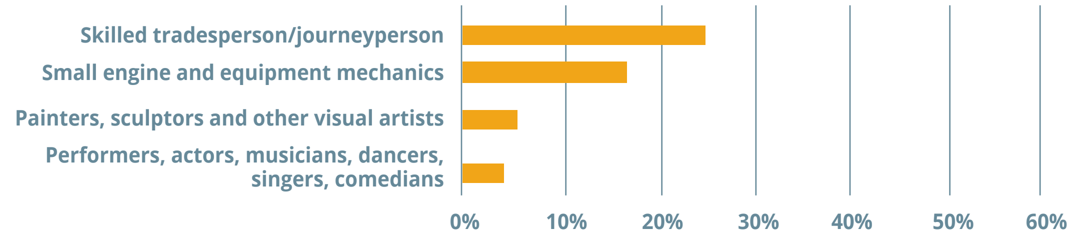
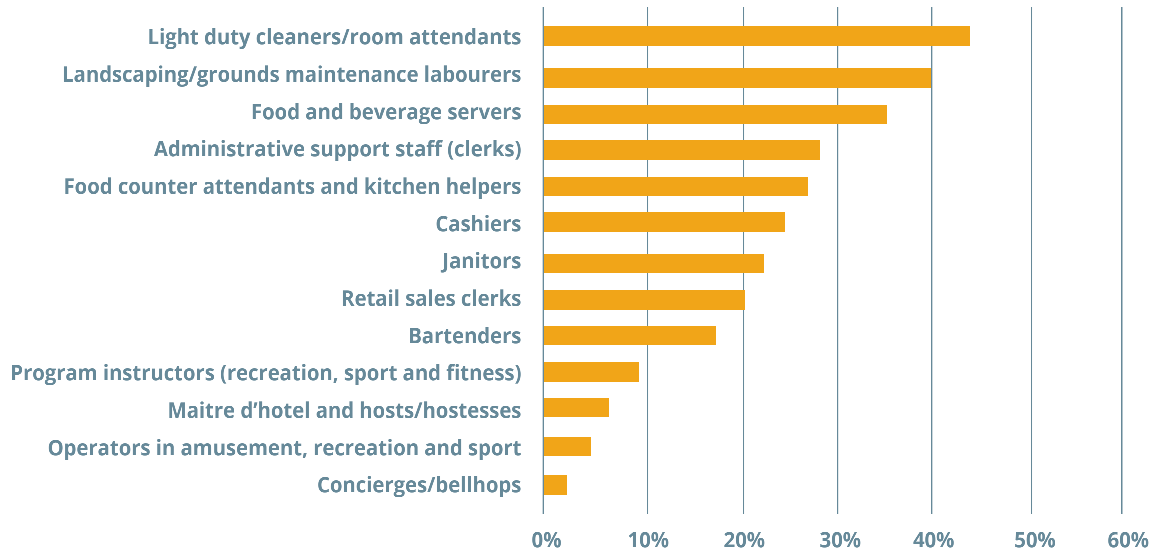


CHART 15 Key occupations – entry-level occupations



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	NE SURVEY (109 Respondents)
Facility operation and maintenance managers	51%	40%
Light duty cleaners/room attendants	43%	52%
Senior administrative staff	41%	30%
Landscaping/grounds maintenance labourers	40%	34%
Sales and marketing managers	39%	35%
Front desk clerks	38%	33%
Food and beverage servers	36%	36%
Site managers	34%	22%
Accommodations managers	33%	28%
Cooks	29%	28%
Administrative support staff (clerks)	28%	30%
Food counter attendants and kitchen helpers	27%	26%
Event coordinators	26%	29%

It is noteworthy that compared to the Northeastern Ontario survey, this current survey resulted in the same 13 occupations being chosen as key occupations, with the exception of the site manager occupation. The percentage figures show some variation, but in most instances it is quite slight.

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:

Hunting/fishing guides
Handyman
Licensed mechanic
Pilots
Marina staff
Heritage presenters
Marine mechanics
Accounting/night auditor
Scientists

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 mark "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 16 Degree of recruitment difficulty – managers

TABLE 25 Degree of recruitment difficulty – managers

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT	NE SURVEY SCORE
Food and beverage managers	1.00	30	10	10	0.97
Facility operation and maintenance managers	0.90	39	7	14	0.94
Sales and marketing managers	0.89	36	16	8	0.77
Human resources managers	0.89	19	9	4	0.74
Accommodations managers	0.86	37	12	10	0.57
Site managers	0.84	32	11	8	0.88

All the manager positions cluster close to the "1.00" mark, which on this scale represents "Difficult". The position of food & beverage managers registers the highest difficulty score. The ranking of difficulty is comparable to the scores from the Northeastern Ontario Tourism LMI survey, except than in that region, accommodation managers scored much lower on the difficulty scale.

CHART 17 Degree of recruitment difficulty – middle skilled staff

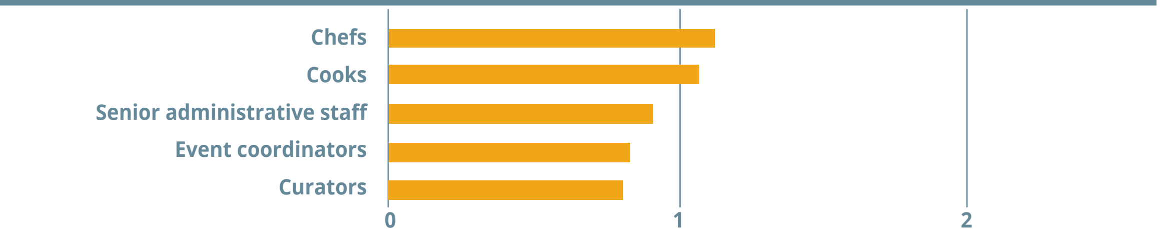


TABLE 26 Degree of recruitment difficulty – middle skilled staff

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT	NE SURVEY SCORE
Chefs	1.15	26	8	11	1.31
Cooks	1.05	39	15	13	1.17
Senior administrative staff	0.90	29	14	6	0.77
Event coordinators	0.83	23	11	4	0.62
Curators	0.80	15	6	3	0.64

Among middle skilled positions, chefs and cooks represent on average a slightly more than difficult recruitment challenge. Responses indicated that chefs posed the greatest challenge, with a difficulty rating of 1.15. However, more respondents experienced difficulty hiring cooks (28 answering "difficult" or "very difficult," compared to 19 for chefs). These two occupations also rated as the two hardest to recruit for in the Northeastern Ontario Tourism LMI Survey, attracting even higher ratings (1.31 and 1.17 respectively).

Senior administrative staff, event coordinators and curator ratings came in just below 1.00, the score for "Difficult."

CHART 18 Degree of recruitment difficulty – middle skilled staff

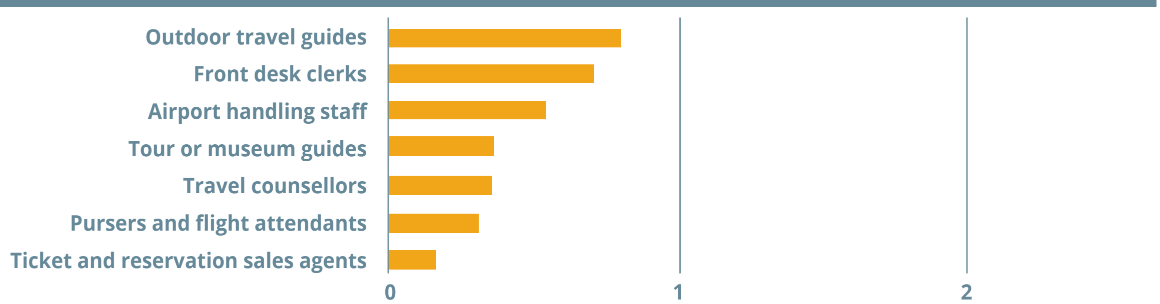


TABLE 27 Degree of recruitment difficulty – travel industry positions

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT	NE SURVEY SCORE
Outdoor travel guides	0.81	16	7	3	0.75
Front desk clerks	0.69	36	17	4	0.63
Airport handling staff	0.56	9	3	1	0.00
Tour or museum guides	0.38	13	5	0	0.55
Travel counsellors	0.36	11	4	0	0.22
Pursers and flight attendants	0.29	7	2	0	0.25
Ticket and reservation sales agents	0.18	11	2	0	0.44

The travel industry positions as a whole appear to have little recruitment challenges. Only outdoor travel guides and front desk clerks come even close to the "1.00" mark. When compared to the Northeastern Ontario Tourism LMI Survey, it is noticeable that the same two occupations rank first and second with a similar score.

CHART 19 Degree of recruitment difficulty – special skills

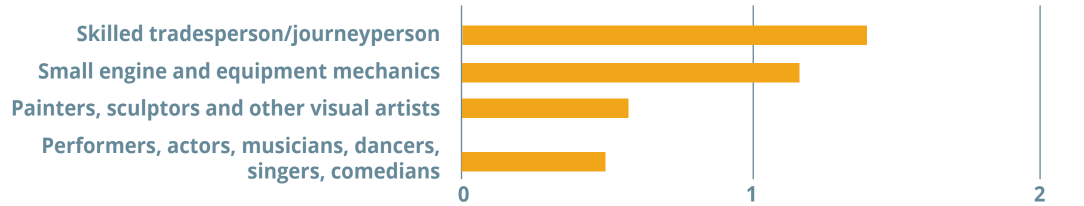


TABLE 28 Degree of recruitment difficulty – special skills

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT	NE SURVEY SCORE
Skilled tradesperson/journeyperson	1.39	31	13	15	1.29
Small engine and equipment mechanics	1.17	23	13	7	0.89
Painters, sculptors and other visual artists	0.60	10	2	2	0.75
Performers, actors, musicians, singers, comedians	0.50	10	5	0	1.00

As appears to be the case across the economy in most jurisdictions, respondents in the survey report they have great difficulty recruiting skilled tradespersons, scoring 1.39 on the difficulty scale. Small engine and equipment mechanics also rated a higher difficulty score.

Compared to the Northeastern Ontario Tourism LMI Survey, this survey scored higher difficulty ratings for skilled tradespersons and small engine and equipment mechanics, but notably lower difficulty ratings for performers, actors, musicians, singers and comedians.

CHART 20 Degree of recruitment difficulty – entry-level occupations

TABLE 29 Degree of recruitment difficulty – entry-level occupations

	SCORE	RESPONSES	DIFFICULT	VERY DIFFICULT	NE SURVEY SCORE
Light duty cleaners/room attendants	1.03	37	18	10	0.95
Janitors	0.92	24	14	4	0.70
Food counter attendants and kitchen helpers	0.88	25	10	6	1.09
Landscaping/grounds maintenance labourers	0.86	35	18	6	0.55
Bartenders	0.83	24	18	1	0.42
Operators in amusement, recreation and sport	0.80	10	6	1	0.60
Food and beverage servers	0.79	39	19	6	0.63
Administrative support staff	0.76	34	20	3	0.38
Maitre d'hotel and hosts/hostesses	0.73	11	6	1	0.75
Cashiers	0.66	29	15	2	0.40
Program instructors (recreation, sport and fitness)	0.64	14	9	0	0.57
Concierges/bellhops	0.55	11	4	1	0.60
Retail sales clerks	0.54	24	11	1	0.41

Light duty cleaners/room attendants have the highest hiring difficulty score among entry-level positions, scoring very close to "1.00," the figure for "Difficult." Of respondents who rated hiring for this occupation, two-thirds claimed it was either "Difficult" or "Very Difficult."

Overall, respondents in this survey scored the hiring difficulty of entry-level positions slightly higher on average than the Northeastern Ontario Tourism LMI Survey. The three most difficult positions were similar. The top three most difficult included light duty cleaners/room attendants, janitors and food counter attendants and kitchen helpers. The results from the Northeastern Ontario Tourism LMI Survey included food counter attendants and kitchen helpers, light duty cleaners/room attendants and maitre d'hotel and hosts/hostesses.

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
Facility operation/maintenance managers	**51%**	Skilled tradesperson/journeyperson	1.39
Light duty cleaners/room attendants	**43%**	Small engine and equipment mechanics	1.17
Senior administrative staff	**41%**	Chefs	1.15
Landscaping/ maintenance labourers	40%	**Cooks**	**1.05**
Sales and marketing managers	**39%**	**Light duty cleaners/room attendants**	**1.03**
Front desk clerks	38%	Food and beverage managers	1.00
Food and beverage servers	36%	Janitors	0.92
Site managers	34%	**Facility operation/maintenance managers**	**0.90**
Accommodations managers	33%	**Senior administrative staff**	**0.90**
Cooks	**29%**	**Sales and marketing managers**	**0.89**
		Human resources managers	0.89

Four occupations are identified as both key occupations to local tourism establishments and for which tourism operators find it hard to recruit. Light duty cleaners/room attendants have the second most number of respondents identifying it as a key occupation. This occupation ranks fifth in the list for being most difficult to recruit for.

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
Facility operation managers	2	1	16	3	0.77	22
Sales and marketing managers	1	2	15	2	0.75	20
Accommodations managers	1	2	12	1	0.63	16
Site managers	2	2	10	3	0.59	17
Food and beverage managers	2	2	13	2	0.58	19
Human resources managers	2	1	8	0	0.27	11

Manager positions are expected to grow a little however HR manager positions are not expected to grow much at all.

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
Chefs	1	0	16	2	0.95	19
Cooks	2	0	23	3	0.89	28
Senior administrative staff	1	4	16	0	0.48	21
Event coordinators	2	2	9	1	0.36	14
Curators	1	0	3	0	0.25	4

Among middle skill staff, the only occupations which have projected slight increases is the hiring of cooks and chefs.

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
Tour or museum guides	1	0	4	2	0.86	7
Front desk clerks	1	1	13	0	0.67	15
Ticket and reservation sales agents	1	0	4	1	0.67	6
Outdoor travel guides	1	1	9	0	0.55	11
Airport handling staff	1	0	4	0	0.40	5
Pursers and flight attendants	1	0	3	0	0.25	4
Travel counsellors	1	2	2	0	-0.40	5

Within the travel industry positions, more than half of the occupations had six 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, pursers and flight attendants and travel counsellors. Of the remaining occupations, front desk clerks and outdoor travel guides are expected to increase a little. It is noteworthy, even with only five respondents, that travel counsellors is rated as one of the few occupations across the entire survey to be expected to decrease slightly in numbers.

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

	Decrease a lot	Decrease a little	Increase a little	Increase a lot	Score	Answers
Small engine and equipment mechanics	1	1	10	3	0.87	15
Skilled tradesperson/journeyperson	0	4	13	4	0.81	21
Performers, actors, musicians, dancers, singers, comedians	2	1	3	0	-0.33	6
Painters, sculptors and other visual artists	2	2	3	0	-0.43	7

Special skills has two occupations predicting a slight increase in hiring which includes small engine and equipment mechanics and skilled tradesperson/journeyperson. There were fewer responses for the occupations of performers, actors, musicians, dancers, singers and comedians, and for painters, sculptors and other visual artists. For these occupations the cumulative score suggested a very slight decrease in hiring, although those predicting increases and decreases almost completely evened out.

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
Food counter attendants, helpers	1	2	15	4	0.86	22
Landscaping/grounds labourers	1	2	12	3	0.78	18
Bartenders	2	0	13	2	0.76	17
Food and beverage servers	2	2	21	2	0.70	27
Janitors	1	1	10	1	0.69	13
Light duty cleaners attendants	2	1	14	2	0.68	19
Operators in amusement, sport	1	0	4	1	0.67	6
Administrative support staff	1	3	16	1	0.62	21
Cashiers	2	1	8	1	0.42	12
Retail sales clerks	1	2	8	0	0.36	11
Maitre d'hotel and hosts/hostesses	1	2	6	0	0.22	9
Concierges/bellhops	2	0	4	0	0.00	6
Program instructors (sport, fitness)	2	0	2	1	0.00	5

Among entry-level occupations, several have slightly higher growth expectations, although still below "1.00," reflecting "Increase a little". This includes:

- Food counter attendants and kitchen helpers; and
- Landscaping and grounds maintenance labourers.

Two occupations did not achieve a positive rating, although the number of respondents was very small. This includes concierges/bellhops and program instructors for recreation, sport and fitness.

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 responses of all respondents will be 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. Overall, for any given initiative, approximately 67 to 77 employers provided a score.

Secondly, comparisons will be made of aggregate scores by different employer population subgroups, to identify differences in emphasis among different 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
Help finding entry-level staff	1	4.81	50%
Customer service training	2	4.80	45%
Pre-employment programs	3	4.79	46%
Seeking funding for training	4	4.57	33%
Making workforce system more effective	5	4.45	39%
Cross-training for flexible workforce	6	4.37	22%
Career awareness for new entrants	7	4.15	25%
Advice on employee engagement strategies	8	4.14	28%
Work experience for community college students	9	3.97	14%
Help managers with employee engagement strategies	10	3.88	12%
Career advancement programs	11	3.81	14%
Work experience for high school students	12	3.73	14%
Survey of local wage rates	13	3.69	16%
Guides to relevant resources	14	3.67	14%
Training for specific work-related skills	15	3.66	14%
Help finding intermediate or senior-level staff	16	3.64	17%
Advice on non-wage benefits	17	3.59	16%
Partnerships to share training costs	18	3.56	15%
Improving management HR skills	19	3.51	10%
Recruiting from less traditional population groups	20	3.50	25%
Work experience for university students	21	3.49	14%
ROI evidence on workforce solutions	22	3.49	8%
Partnerships to share employees across seasons	23	3.46	9%
Work experience private vocational college students	24	3.41	7%
Training in literacy and essential skills	25	3.31	18%

In addition to comparative data with the Northeastern Ontario Tourism LMI, another reference point is a survey administered by Regional Tourism Organizations, RTO 4 (Huron, Perth, Waterloo and Wellington) and RTO 7 (Bruce, Grey and Simcoe). This survey was completed in the fall of 2012 and involved 274 tourism sector employers. The potential workforce initiatives that were ranked as the top ten in each of these three surveys are compared in Table 37. This includes the current one – Algoma/North Central and Northwest Ontario, together with Northeastern Ontario and RTOs 4 & 7,

It is striking that of the 25 options presented in these three surveys, 9 of the same initiatives were listed in each survey's top 10. These are colour-coded to illustrate their commonality.

TABLE 37 Top ten ranking of potential workforce initiatives, results from three surveys

NORTH CENTRAL/ NORTHWEST ONTARIO	NORTHEASTERN ONTARIO	RTO 4 & RTO 7
Help finding entry-level staff	Customer service training	Customer service training
Customer service training	Pre-employment programs	Pre-employment programs
Pre-employment programs	Seeking funding for training	Seeking funding for training
Seeking funding for training	Making workforce system more effective	Career awareness for new entrants
Making workforce system more effective	Cross-training for flexible workforce	Work experience for community college students
Cross-training for flexible workforce	Career awareness for new entrants	Survey of local wage rates
Career awareness for new entrants	Help finding entry-level staff	Making workforce system more effective
Advice on employee engagement strategies	Help managers with employee engagement strategies	Cross-training for flexible workforce
Work experience for community college students	Work experience for community college college students	Help finding entry-level staff
Help managers with employee engagement strategies	Training for specific work-related skills	Help managers with employee engagement strategies

Three issues rank right at the top:

- Customer service training;
- Pre-employment programs; and
- Seeking funding for training.

In the case of Algoma/North Central and Northwest Ontario, the desire for help in finding entry-level staff surpasses these three issues in importance.

The survey sample size is not sufficiently large to allow for robust comparisons between population sub-groups. The only groupings that offer a significantly larger number are respondents in the accommodations sector, and employers with 1-4 employees.

Among these categories, there are only a few instances where the results deviate significantly from the total scores. These are as follows:

For employers in the accommodation sector:

- More likely to desire help in finding entry-level and/or high turnover and/or seasonal staff. This received a score of 5.15 with 63% of these employers ranked it as a highest priority.
- Less likely to want help in facilitating the ability of more than one employer to share the costs of employee-training.

For employers with 1-4 employees:

- Far less likely to support efforts to increase the potential labour pool by targeting specific population groups (Aboriginal populations, older workers, persons with disabilities, newcomers to Canada).
- Less likely to seek support for training in basic literacy, numeracy, computer and related essential skills.
- Less likely to desire help with identifying, choosing and implementing effective employee engagement strategies.

Participation in workforce development initiatives

After having requested employers to assess different potential workforce initiatives, 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.

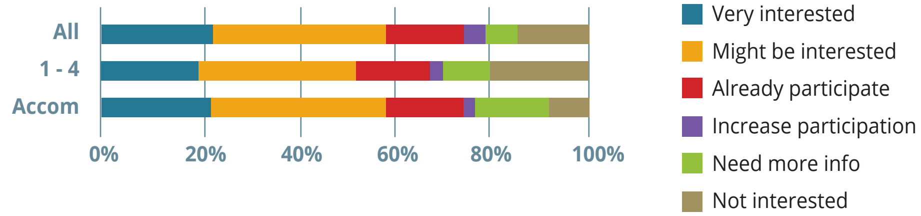
Employers were asked to indicate which statement best reflected their view:

- 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:

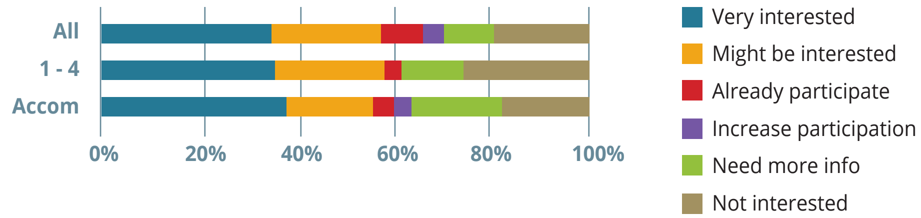
DESCRIPTION IN SURVEY	SHORT VERSION
I would be very interested to participate	Very interested
I might be interested to participate	Might be interested
I already participate in such an activity	Already participate
I already participate in such an activity, but I would consider expanding what I am already 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

CHART 21 Willingness to host a high school work placement student



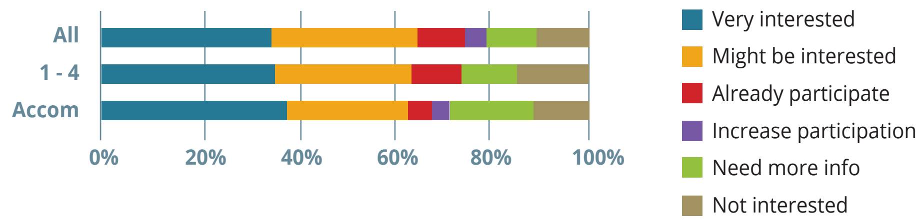
Results indicate that 60% of employers are or might be interested in a high school student placement. The "might be interested" is the considerably larger category. Approximately one out of every six respondents claims that they already hold a high school student. Employers with 1-4 employees are less likely interested.

CHART 22 Willingness to host a private career college work placement student



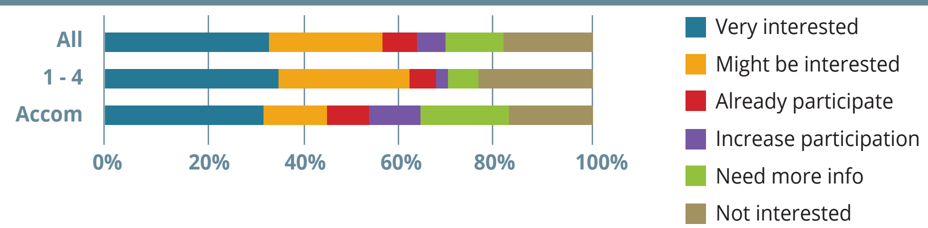
Respondents showed quite a high degree of interest in the possibility of a placement of a private career college student. The figures for "not interested" are higher than those for a high school student placement.

CHART 23 Willingness to host a community college work placement student



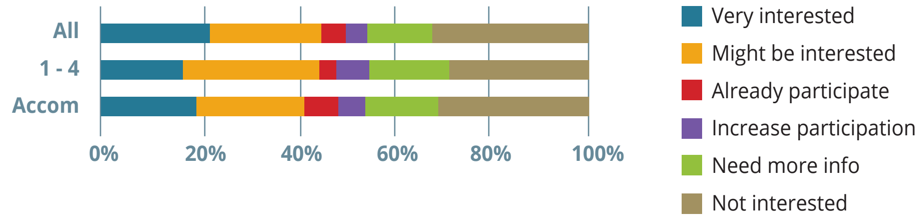
The possibility of a community college student placement has the highest positive ratings, both in terms of very interested (over a third) as well as might be interested (almost another third). One in eight (13%) currently host a community college placement and a relatively smaller number express no interest.

CHART 24 Willingness to host a university work placement student



There is a relatively high degree of interest in hosting a university student, only slightly lower than the figures for a community college student placement. Slightly more respondents seek more information or are not interested. Employers with 1-4 employees express both the highest degree of interest in hosting a university student as well as the highest proportion who indicate that they are not interested.

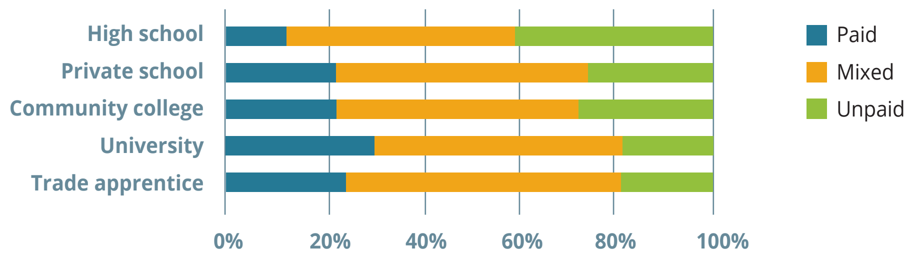
CHART 25 Willingness to host a trade certificate apprentice



Employers are least likely to host a trade certificate apprentice. This could be for a variety of reasons including, they do not have an apprenticeship occupation within their team, do not have the appropriate number of journeymen or they do not wish to take on the remuneration required in the case of an apprentice. Nevertheless, 45% express some level of interest.

Paying for a work placement. Most employers are prepared to pay for some portion of the cost of a placement, although employers make clear distinctions between the levels of study of the students. In the case of a high school placement, 41% indicate they would expect not to pay.

CHART 26 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.

The next four charts present the results of the responses. Overall, employers have the greatest interest in training for specific work-related functions, where over 60% express an interest and 11% already engage in such training. The next priority training item is customer service training. Employers express slightly less enthusiasm for training directed at supervisors and managers, and have only limited interest in training for literacy and essential skills.

CHART 27 Willingness to host workplace training for literacy and essential skills

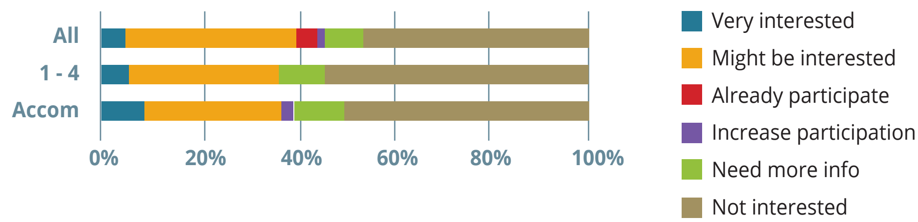


CHART 28 Willingness to host workplace training for customer service and soft skills

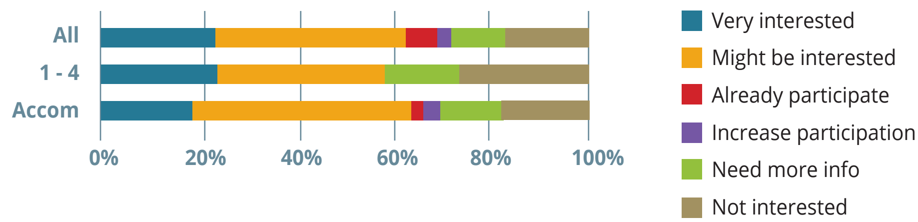


CHART 29 Willingness to host workplace training for specific work-related functions

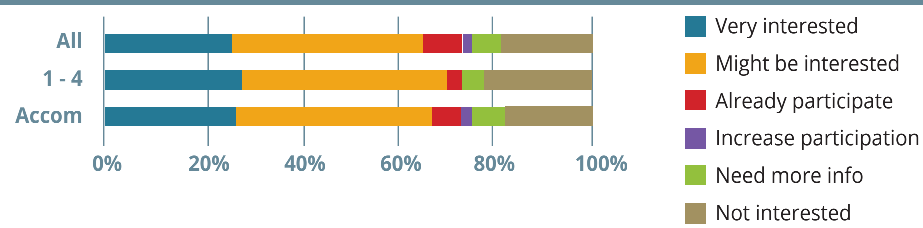
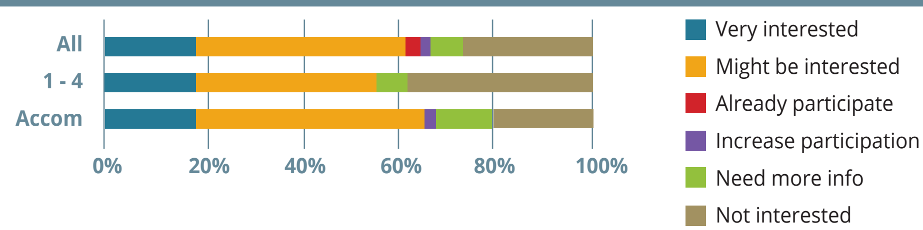


CHART 30 Willingness to host workplace training for supervisors and management



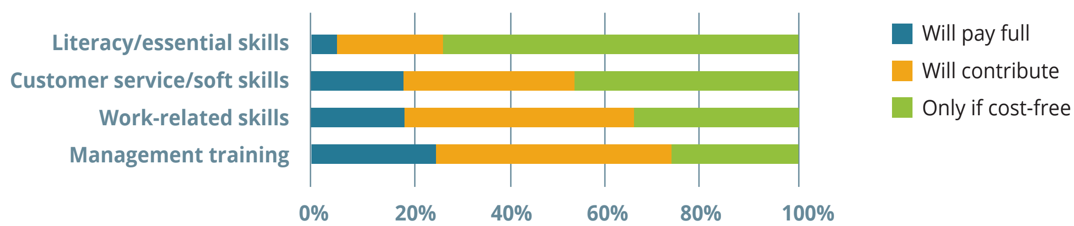
In most instances, employers with 1-4 employees have a higher proportion of those expressing no interest in each of these forms of training. However, when it comes to training for specific work-related functions, employers with 1-4 employees have the highest proportion of expressing an interest. This suggests that this category of employers contain large numbers at both ends of the training interest spectrum.

Paying for the cost of training. Employers make clear distinctions regarding the kinds of training they are prepared to contribute to the cost. With respect to literacy and essential skills training, 70% of employers indicate they would only host such training in their workplace if it was free. This is compared to 38-46% of employers indicating the same thing for other forms of training.

Employers were asked to indicated 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 chose among the following three options:
- If right training, would pay the entire cost;
- Willing to contribute to cost; and
- Will participate if training is cost-free.

CHART 31 Willingness to contribute to the cost of training, all employers

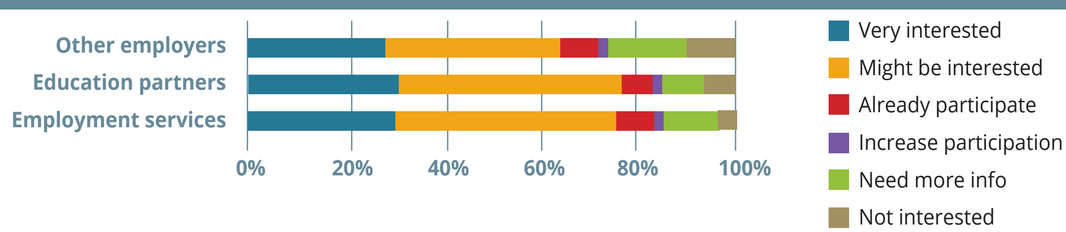


In the same way, when it comes to paying the full amount of the training costs, employers appear slightly more inclined to do so in the case of training for managers and supervisors. Employers with 1-4 employees are far more likely to participate in training if it were free. The same group of employers are less likely to pay the full amount or contribute to the cost.

Partnerships in workforce development. 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.

CHART 32 Willingness to work together with other employers on workforce issues



Overall, employers express an openness to partnering with others when it comes to addressing workforce issues with 62% to 74% indicating their interest in partnerships. Employers are slightly more inclined to partner with educational sector partners, and appear just a little less inclined when asked to partner with other employers. Only a small percentage show no interest in the proposition of partnerships.

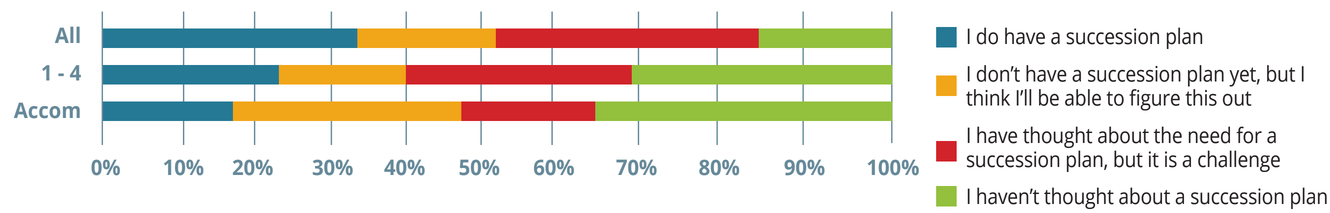
Succession planning

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. Approximately 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.

CHART 33 Willingness to develop links with employment services providers



Other comments

The survey invited respondents to add any other comments they wished to make. Around a quarter of the respondents did so, with many expressing the great frustration of finding capable and reliable workers for entry-level jobs. The following provides unedited responses:

- *It is very frustrating as an employer to go through interviews and hiring to have people come in for a week and stop showing up.*
- *Most of our labour force is basic housekeeping, grounds keeping and general maintenance. It is extremely difficult to get people to do these jobs especially now that minimum wage has gone up. We used to be able to pay above minimum wage but now with the increase, we can only pay minimum wage. We find that the employees with minimal job skills are extremely unreliable and only work when they want to work and with only being able to employ people seasonal, when one gets a good employee we have to lay them off during the off season.*
- *Although we have a 7½% unemployment rate we go months without filling positions. The 7½% is probably only 2% when you filter out the ones without problems or those that work seasonally.*
- *The kids we get applying do not want to work. They want to get paid but do not follow instructions and gets mad when corrected.*
- *The seasonality and/or remoteness of the location compound the challenges:*
- *We are in the same boat as the rest, difficult to motivate local staff to perform. Difficult to attract potential workforce to come to Kenora and pay competitive wage when our busy season is only 8 weeks long.*
- *It is very difficult at times to get good staff to work in a quality remote resort. Money is good but there is NO social life.*

- *Yes difficult to find people for the service industry. Jobs like housekeeping, front desk, hostess etc. are hard to fill and take time to train the student and then summer is over and they are gone. Next season you start again.*

- *The cost of travel is a challenge when recruiting skilled and experienced employees.*

- *This issue appears particularly pronounced for skilled tradespersons:*

- *I am interested in improving my customers experience and the appropriate training will help however it is immeasurably frustrating when I cannot find anyone to do some simple painting and or basic carpentry work. I have observed carpenters who have arrived and within days their quotes for additional work doubles as others find out there is someone new in town who is capable and everyone is scrambling for them. If your goal is to help fill what is desperately missing to improve some of the businesses then I would suggest bringing in semi skilled migrant workers by the bus load. They do not have to have high bench marks for English language as they will not be working with the public, just hard workers with some basic skills.*

STAKEHOLDER INTERVIEW FINDINGS

The stakeholder engagement process was an integral step in acquiring the primary research necessary to develop the LMI Study. Consultations with key informants from industry groups provided anecdotal evidence in relation to perceptions toward labour and skills challenges. Individuals were from the Districts of Algoma, Cochrane, Kenora, Rainy River and Thunder Bay.

This process 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 Guidebook.

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, community organizations and industry resources.

A variety of engagement methods were provided in order to gain as much input into the process as possible. This includes:
- One-on-one interviews
- Focus groups
- Teleconferences
- Surveys

Stakeholder Groups

During a series of interviews and discussions, feedback was collected about the perceptions of various stakeholders. Topics included the current and future supply and demand for labour in Algoma/North Central and Northwest Ontario. Upwards of 40 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 information discussed and identify labour market issues, trends, proposed 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
- Destination Marketing Organizations
- 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 their geographic 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?*

- Negative perception of tourism industry with respect to career development- stigma.
- Aging workforce makes sustainability a challenge.
- Declining population.
- Lack of applications.
- Recruiting entry level staff for seasonal work.
- Attraction of qualified/skilled staff.
- Large number of entry level and part-time positions.
- Low wages makes it hard to compete with other sectors and communities.
- Misconception of wages especially with serving positions and opportunities for advancement/growth.
- Lack of change amongst employers to meet times.
- Limited growth opportunities makes it difficult for retention and attraction.
- Lack of work ethic and ambition among youth.
- Lacking entrepreneurial culture or support for home-based business.
- Perception that tourism does not present a real career opportunity, rather an "in the meantime job" (job vs. career mentality).
- Retention of employees – train them and they leave after a few months.
- Finding employees with appropriate skills – a real problem for many lodges is to find a qualified chef/cook on an annual basis.
- Seasonality of employment creates recruitment and retention challenges.
- Willingness of staff for shifts especially given hours required.
- Difficult to attract qualified staff with low pay in the sector.
- Level of professionalism- loss of service attitude.
- Finding local seasonal workers.
- Employers struggle with properly training and outlining expectations to new hires.
- Requirement of qualified workers.
- High turnover rates in regards to employees.
- Youth outmigration- young people are leaving to get skills/education and do not return.
- Perception of low paying positions and career growth in tourism sector.
- Service industry perceived as low pay for long hours.
- Different needs/expectations with younger generations.
- Career within industry means relocation and movement.
- Decreases in tourism program enrollment- creates a talent "puddle" vs. talent "pool".
- Lack of essential skills training.
- Retention of summer students- often leave to return to school before season is over.
- Absenteeism issues within more difficult positions.
- Lack of succession planning and limited interest from buyers to purchase lodges/camps.
- Threat of business closures/cut backs creates retention difficulties.
- Lack of support for home-based businesses to assist with growth and job creation.
- A career in the industry often means re-location.
- Lack of people to work with youth is limited in remote communities.
- Job application process can impede recruitment (e.g. online can be hard for seniors, print ads not reaching youth, etc.)

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

- Kitchen staff / qualified cooks.
- Housekeeping / cleaners.
- Maintenance / general labourers.
- Guides.
- For retailers, finding employees to stay on for at least a year (high turnover).
- Key holders who can be responsible for opening/closing business.
- Professional servers due to lack of training .
- Qualified sales & service personnel.
- Small towns have an increasingly difficult time retaining talent due to competition in larger centres.

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:

Sagamok First Nation Health Care Partnership Model
*Could be implemented within tourism sector
OTEC
MNO Ready to Work Program
Gezhtoojig Training Services
High School and Post-Secondary Coop Programs
Job Shadowing programs
Seven Generations Education Institute Programs
Internal FAM tours

Employment Programs:
NOHFC Internships
Gezhtoojig Employment Services
Employment Ontario
Youth Employment Fund and the Summer Jobs Service.
Lake of the Woods Employment Action Project
NOHFC Internship program (full time positions only)
Job Creation Partnership (MTCU)
Northern Summer Jobs Service (summer student wage subsidy – MNDM)
Canada Summer Jobs (summer student wage subsidy – Federal program)
Northwest Employment Works (summer student wage subsidy)
Metis Nation of Ontario – various wage subsidy programs
AWIC Mining Program

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

- Hard to put service in people's heart. More use of technology (credit card swipe on ipad) in the guest experience would also benefit and attract staff.
- More training for employers on how to handle employee training and expectations. The Northwest Business Centre is putting on an event to focus on just that – empower entrepreneurs and organizational leaders with understanding, tools and tactics to engage employees and create company culture.
- Offer higher wages to attract and retain employees. It is much more cost effective to retain employees than to constantly recruit and train new ones.
- Take advantage of government programs – i.e. wage subsidy programs.
- Partnerships with college hospitality programs and Tourism/EDC offices.
- Eco-product development focus.
- Youth at-risk program within tourism.
- Work with communities to increase capacity/expertise to handle tourists and recognize importance of welcoming community.
- Interest youth in tourism through a formalized approach involving integration of leadership, experiences, self-discovery, career paths, community placements, volunteering, certifications, etc.
- Create pride of place at community level by creating inventories/identifying assets, skills, HR needs and gaps.
- Develop employment opportunities by creating gen-y focused opportunities and new ways of thinking to interest youth.
- Pre-packaged training course to help individuals apply for positions and develop skills that are available online or in-person. Involve employers by having them discuss certain topics.
- Educate employers on labour market needs and employees on workplace standards.
- Offer retail, mining, hospitality training jointly for transferable skills.
- Look for ways to re-hire stay at home parents by offering flexibility.
- Develop a model that fosters entrepreneurial spirit within sector, while providing access to capital and support to operators to start up and/or expand.
- Review AWIC's mining model in Chapleau and Wawa and assess feasibility of creating similar tourism program.
- Online training calendar to provide programs/services across Northern Ontario that will increase communication and credibility.
- Tourism Matters! model in Kenora fosters community pride among businesses before season kicks off.
- Employer engagement and ownership model (WestJet concept).
- Programs such as childcare and transportation to assist employees who work outside traditional 9pm-5pm hours.
- More programs to teach "back of house" customer service.
- More education at large about impact of tourism sector's economic impact (GDP, growth opportunities, etc.)
- Increase awareness about service standards.
- Re-position industry to create interest/energy within tourism (Banff/Whistler model).
- Re-focus approach from "tourism by accident" to "tourism by design".
- Toolkit to helps youth/students to want to stay in Northern Ontario tourism sector.
- Increasing awareness about employer and staff training opportunities.
- Marketing campaigns/ambassador programs to positively showcase aspects of tourism employment opportunities and embrace pride of place.
- Consider providing non traditional perks to employees to help with retention (e.g. phone minutes, gift certificates, etc.).
- Use Lakehead "Camp Day" as model to assist operators in recruitment efforts and do the same for placement & co-ops opportunities.
- Develop collectives (e.g. Chef's Collective).

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

- Seasonality of the jobs available – they go from late spring to early fall then the employees get laid off.
- Relatively low wages paid to tourism employees is another problem.
- Too many organizations/groups work in silos - remove the barriers within sector.
- Employers often lack willingness to provide training/experience due to money and poor economic times.
- Employers who treat employees well and motivate them have less of a challenge with recruitment and retention.
- Often it is the employer's mindset that needs to be changed with respect to customer service.
- Career councillors often have challenges dealing with employers who are "too busy" to assist with recruitment programs.
- More connections/discussion between various government levels and impact on big picture is required - e.g. MNR fishing license decisions could have substantial impact on tourism sector unintentionally.
- Future programs need to be localized for remote areas and include in house training programs (not just workshops). Often too difficult to go to larger urban centres for training.
- Lack of expertise in running and promoting events.
- Would like to see the development of an education centre focused on alternative construction, green economy.
- Consider Gros Mourne Institute as a Best Practice.
- Stimulate interest in tourism by increasing awareness (e.g. expose youth to careers through high schools).
- Consider transportation to get people to training programs.
- Consider partnerships with Social Service Administration Boards to develop regional programs/partnerships.
- Develop a secret shopper / hotel impossible program to assist businesses with enhancements.
- There is a lack of flexibility of to customize programming and consider barriers to learning.
- Work with SBEC's and CFDC's to provide one-on-one SME business support to build capacity.
- First nations beginning to buy businesses but need training.
- There is a gap between grade 11 Superior Heights culinary program & post secondary studies. The students tend to lose interest.
- There are a lack of turn-key opportunities for investment.
- Need to increase awareness and tools for SME succession planning.
- Develop online resources to highlight opportunities to purchase tourism businesses and include capacity building and support for new owners.

7. CONCLUSION & 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 GUIDEBOOK

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 research reports and the Implementation Guidebook to navigate community partners and industry through the advancement of Northern Ontario's tourism workforce.

The Implementation Guidebook serves as a roadmap for potential new initiatives to combat the identified challenges and gaps. It takes into account the trends and opportunities throughout Northern Ontario following the LMI research process and assists with the process for next steps.

The actions identified are based on the trends and themes affecting Northern Ontario's tourism sector. The plan has been developed as a mechanism to assist the development of a strong and committed labour force. With an overall vision to create a healthy sector, the Implementation Guidebook offers recommendations to build upon opportunities and mitigate challenges.

TOURISM NORTHERN ONTARIO

The Labour Market Group
Guiding partners to workforce solutions.

FedNor Canada

Ontario
Ministry of Tourism, Culture and Sport