
Ontario Tourism Workforce Development Strategy Project

AUDIT REPORT

March 2012



TABLE OF CONTENTS

Section 1: Introduction	2
Section 2: Objectives	4
Section 3: Methodology	4
Section 4: Skills Inventory	6
Section 5: Labour Market Indicators	13
Section 6: Industry Trends and Perceptions	21
Section 7: Human Resource Organization/Sector Council Trends and Perceptions	30
Section 8: Education and Workforce Development Sector Trends and Perceptions	34
Section 9: SWOT Analysis	49
Section 10: Special Considerations	54
Section 11: Contributors	55
Section 12: References	56
Appendix A – List of Key Terms and Abbreviations	
Appendix B – Secondary School Inventory	
Appendix C – College Inventory	
Appendix D – Private Career College Inventory	
Appendix E – University Program Inventory	

SECTION 1: INTRODUCTION

The importance of Ontario's tourism industry cannot be overstated. As the country's largest tourism market, Ontario represents nearly 40% of Canada's tourism employment. Within Ontario, tourism accounts for 9.0% of total employment, providing over 608,000 jobs (Preliminary Data from 2010 HRM Update, CTHRC, 2012). Given the scale of the industry, and its labour market, tourism performance is critical to the health of Ontario's economy as a whole. However, the industry is currently facing challenges that stem from a variety of short and long-term factors. A strong Canadian dollar, a weakening U.S. economy, changing demographics, increasing international competition, and a looming labour shortage, all threaten to weaken the sector's performance over the coming decade. As a service industry, any opportunities for Ontario's tourism sector to enhance its competitive offering will rest, in part, on the sector's ability to recruit, train, and retain, a skilled and committed workforce.

It is now time to galvanize the Provincial Tourism sector to respond to these issues and to take action as outlined in the 2009 Discovering Ontario Report, an in-depth look at the future of tourism in the province, created by the Ontario Ministry of Tourism. While a number of priorities and recommendations were provided, the following succinctly highlights the issues relevant to workforce development:

"Today's tourists are not just looking for a place to stay; they are seeking a very high level of service. This means the level of skills required from today's tourism workforce is increasing. At the same time, attracting and retaining high-quality employees is critical to the sector. There is a pointed need to address labour gaps." (Discovering Ontario Report, page 34, 2009)

In order to deliver on these recommendations, the report proposed to create a comprehensive provincial tourism human resource strategy. A provincial strategy should support training and quality standards and instil best practices in innovation, technology and management (Discovering Ontario Report, page 43, 2009).

As well, it is important to note that workforce development has been highlighted as a national tourism priority in Canada's Federal Tourism Strategy (Canada's Federal Tourism Strategy: Welcoming the World, 2011). Similarly, the document "Building a National Tourism Strategy," has identified some of the challenges and priorities for strengthening tourism competitiveness across Canada. Developed by the Federal/Provincial/Territorial (FPT) governments in consultation with industry, this strategy reinforces the need to have a strong workforce development focus to ensure the industry remains competitive. Issues include potential labour shortages and the fact it will become increasingly important to enhance the quality of jobs in the tourism industry and to facilitate the entry of those who are under-represented in the labour force.

"Although the tourism industry offers the first work experience for many people, the sector is sometimes ill-perceived as a career choice. At the same time, the ability to attract skilled employees is critical to the industry's growth. There is a need to promote the wide range of long-term career opportunities and prospects that tourism offers, particularly in the operation and management ranks, as well as general hospitality". (Building a National Tourism Strategy, page 14, 2011).

Reinforcing the above, the 2012 Canadian Chamber of Commerce “Top 10 Barriers to Competitiveness” report indicates that the national skills shortage represents this country’s single greatest threat to competitiveness in the years to come (Top 10 Barriers to Competitiveness, 2012).

In keeping with these recommendations, many Canadian provinces already have well developed tourism workforce strategies and are now working toward implementation of their strategic initiatives. It is also important to note that workforce development has been highlighted in the tourism strategies of international tourism destinations such as Australia, New Zealand and Hawaii. Many of these destinations and the states, regions, and jurisdictions within them, now have specific tourism workforce development strategies in place. Workforce planning has been a priority in these markets for several years and many of the issues affecting the Canadian tourism sector are similar in other key tourism destinations (New Zealand Tourism & Hospitality Workforce Strategy, 2006; Australia’s Tourism and Hospitality Workforce Development Strategy, 2009, Hawai’I Tourism Workforce Development Strategic Plan 2007-2015, 2007).

So where do we start in Ontario? At the provincial level, research conducted on tourism workforce activities and capacity has identified that weak perceptions of career opportunities in the industry, as well as the lack of coordinated career awareness programs, are hampering recruitment efforts. In addition, various gaps in available front-line and management training programming is limiting the provincial capacity to provide the skills required by the industry (Ontario Tourism Industry Structure Assessment Research Study, 2009). These challenges are further compounded in Ontario by a changing set of workplace demographics and skills requirements that place increasing pressure on human resource managers, owners and operators as they attempt to plan for the future.

Building on the recommendations provided in the Discovering Ontario Report, this Ontario Tourism Workforce Development Strategy Project Audit Report will be the foundation for the creation of an Ontario Tourism Workforce Development Strategy. Utilizing feedback from stakeholders throughout the sector, the report will provide an up-to-date inventory of provincial tourism workforce development frameworks and an assessment of workplace skills issues in Ontario. The skills inventory will then be evaluated against the labour market trends and projections, as well as the perceptions and activities of industry and workforce development stakeholders. This process will facilitate an analysis of the opportunities for collaboration toward a comprehensive Ontario Tourism Workforce Development Strategy.

SECTION 2: OBJECTIVES

The objectives of this audit are to:

1. Develop an inventory of academic, community and industry workforce development activities and outcomes and assess against prevailing workplace skill levels.
2. Gather industry perspectives on the issues affecting attraction, retention and workforce development in Ontario's tourism sector.
3. Forecast labour supply and demand projections across a range of occupations and identify priority gap or surplus areas.
4. Assess the frameworks through which the supply of tourism labour and skills is coordinated to meet industry demand.

SECTION 3: METHODOLOGY

To meet the objectives of this report, OTEC utilized a methodology that assesses the existing supply of workforce skills, and skills development frameworks, against the industry market for labour and workforce development activities. This required the development of five distinct areas of inquiry:

1. An inventory of all available provincial tourism education and pre-employment programs: high school; college; university; bridging programs; apprenticeships; association initiatives; independent professional development options, etc.
2. A preliminary review of workforce skills levels in Ontario's tourism workplaces.
3. A compilation of labour market indicators: labour market projections, demographic trends, compensation, etc.
4. An analysis of industry and stakeholder perspectives on workforce development issues, priorities and activities.
5. A SWOT analysis of the strengths, weaknesses, opportunities and threats to tourism workforce competitiveness represented in Ontario's tourism workforce development frameworks.

Data Collection

To assemble an up-to-date inventory of education and pre-employment programs, consultations were undertaken with representatives from Colleges Ontario, the Ontario College Application Services (OCAS), Ontario Universities Application Centre (OUAC), the Canadian Tourism Human Resource Council (CTHRC), Smart Serve and various other training and institutional representatives. Program inventories were then supplemented with statistical graduation and employment data where available.

To develop an understanding of provincial tourism workforce skills issues, the project team conducted a literature review of workforce skills research and issues in Ontario. The project team consulted with representatives from four of the leading national and provincial literacy and

essential skills organizations in order to identify the most relevant set of research and data on the topic. Informants included the Ontario Literacy Coalition (OLC), the Social Research and Demonstration Corporation (SRDC), Frontier College, and Community Literacy of Ontario. The literature was then supplemented with direct skills assessments conducted with over 50 front-line housekeeping, food and beverage, culinary, and guest service workers from across the province, who were selected for their “typicality.” The aggregate data from these skills assessments was then compared against national averages for these occupations.

Labour market indicators were compiled from the latest set of industry research publications, including the preliminary findings of the recent update to the 2010 Human Resource Module of the Tourism Satellite Account for Ontario, and the preliminary results of the 2012 update to the Future of Canada’s Tourism Sector Report, which will be published in 2012.

Finally, industry and stakeholder perspectives on workforce development issues, priorities and activities, were gathered through a series of surveys, interviews and secondary research conducted from December 12th, 2011 to January 11th, 2012. Survey tools were tested by industry and education sector representatives before being distributed to 2707 industry businesses, 9 associations, 13 RTO’s, 45 DMO’s, 500 educators, and 200 pre-employment services representatives. Actual total number of industry surveys sent could be higher as RTO’s, DMO’s, and Associations were asked to forward the Industry Survey on to their members. Direct follow-ups were conducted in order to secure a total response rate of approximately 18%.

Analysis

The provincial skills inventory and workforce skills assessment was then analyzed against the labour market trends, industry perceptions, priorities and activities. A SWOT analysis was conducted to determine the strengths, weaknesses, opportunities and threats to tourism workforce competitiveness represented in the frameworks through which the supply of tourism labour and skills is coordinated, to meet industry demand.

Strengths and Limitations

The project team had access to, and involvement in, a significant body of secondary research which informed the priority areas of inquiry, and enabled the research team to, both, validate prior studies, and, focus its primary survey research on delving further into the perception-based data that impacts how stakeholders might interact in a provincial strategy.

The research team noted that, despite securing an 18% response rate to the survey, response validity was sometimes impacted by the fact that participants did not always share a common understanding of key terms and organizational categories. Furthermore, the project design sought to gather data on the activities of private industry training and consulting companies through the survey mechanism but these organizations were not identified by respondents. The services provided by organizations like We Train Hotels, the Tourism Company and Deloitte should be noted as resources available in the implementation of industry research and training. To mitigate these issues and ensure the reliability of these results and any subsequent recommendations, the project team conducted a series of follow-up consultations with the industry representatives and committees.

SECTION 4: SKILLS INVENTORY

EDUCATION AND WORKFORCE DEVELOPMENT ACTIVITIES

Secondary School Inventory

The Specialist High Skills Major (SHSM) program in Hospitality and Tourism gives students an opportunity to specialize, gain qualifications, and plan a career pathway in various areas of the Tourism and Hospitality sector while still in high school. Across Ontario, 130 secondary schools offer the SHSM program in Hospitality and Tourism.

The Canadian Academy of Travel & Tourism (CATT) program introduces and promotes careers in tourism to high school students across Canada. The CATT program is integrated into the current high school curriculum, and allows students to specialize in tourism through a successful work and study approach. Throughout Ontario, 31 secondary schools participate in the CATT program.

Post-Secondary School Inventory

College Tourism Programs:

Within the network of Ontario Colleges, a total of 251 diploma, post diploma and certificate programs are available which cater to the accommodation, food and beverage, recreation and entertainment, travel services and transportation industry groups of the tourism sector.

Tourism Industry Group	Number of Programs
Accommodation	42
Food and Beverage	108
Recreation and Entertainment	70
Travel Services	21
Transportation	10

The 2009-2010 Employment Profile of Ontario College Graduates is the most current information available from the Ministry of Training, Colleges and Universities (MTCU). The industry groups Accommodation, Food and Beverage, Recreation and Entertainment, and Travel Services, align with the MTCU categorizations Hospitality Management, Culinary Arts, Recreation/Fitness and Travel/Tourism respectively. An analysis of the top five industries of employment for each of these categories indicates that the overall top five industries of employment for graduates entering the tourism workforce are Food Services and Drinking Places (40.6%); Accommodation Services (18.5%); Amusement, Gambling and Recreation Industries (15.1%); Administrative and Support Services (9.5%); and Nursing and Residential Care Facilities (5.0%). More specifically, the top five occupational categories for graduates across the province were Cooks (21.4%); Retail Salespersons and Sales Clerks (11.5%); Food and Beverage Servers (10.1%); Hotel Front Desk Clerks (9.2%); and Food Counter Attendants, Kitchen Helpers and Related Occupations (8.3%).

Private Career College Tourism Programs:

Private Career Colleges across the province, offer a total of 82 certificate, diploma and undergraduate degree programs, specializing in tourism and hospitality.

Tourism Industry Group	Number of Programs
Accommodation	16
Food and Beverage	34
Recreation and Entertainment	18
Travel Services	14
Transportation	0

University Tourism Programs:

Throughout Ontario, there are 18 undergraduate and graduate degree programs that specialize in tourism and hospitality. More than half of these programs prepare graduates to enter the industry group of Recreation and Entertainment, with only 5 of these programs preparing students to enter either the Accommodations or Food and Beverage industry group.

Pre-Employment Programs:

Analyzing pre-employment preparation programs across Ontario revealed tourism related programs consist of occupation-specific certifications such as Service Excellence, WHMIS, Smart Serve, National Food Safety Training Program, In Good Hands Food Safety and First Aid/CPR.

Intensive programs exist for various client groups including youth, newcomers, women, Aboriginal and mature workers. Over 160 tourism related programs exist across Ontario funded by Ontario Works (OW) division of various Municipalities such as Toronto, Ottawa, York and Durham Region and Employment Ontario funded sites.

For example, Smart Serve Ontario offers responsible alcohol service education and training. Over the last three years, 120 municipalities have used their services, certifying 2,341 individuals; 112 high schools, certifying 2,568 individuals; 144 social and employment serving agencies, certifying 10,672 individuals. In addition, all of the colleges within Ontario are using the Smart Serve programming in various courses, including tourism and hospitality programs.

National Food Safety Training Program certifies over 10,000 people in Ontario each year. Specific breakdowns do not exist by education, pre-employment preparation, industry organizations, etc.

Given the large variety of programs, differing levels of intensity, and, diversity of client groups being served in pre-employment training networks, employment figures are difficult to aggregate

by industry cluster. Where employment targets are in place, they can range from 60 to 70% depending on the client group and funder, but these targets are often surpassed by organizations that have nurtured strong industry relationships. For example, HT Hospitality Training Inc. in Ottawa, has consistently maintained an employment rate of over 90%.

Challenges were experienced when identifying tourism related programs in the province. These challenges included lack of data and no central location outlining programs. Programs relating to hospitality and tourism were not clearly outlined, but did exist.

Examples of intensive tourism and hospitality pre-employment training programs include:

Organization	Program Offered	Program Description
London Training Centre	Local Foods Program	3 week introduction combining classroom and kitchen instructions.
Niagara Women’s Enterprise Centre	Hospitality Program offering Safe Food Handling, WHMIS, Smart Serve	Students receive Professional Restaurant Server and Etiquette Certificate.
YMCA of Greater Toronto	Hospitality Training Program – Food Handlers’ Certification	18 week program for OW recipients with 96 hours of classroom training. Clients receive First Aid and Food Handlers Certification upon completion.
Learning Enrichment Foundation	Cooks Training Program	17 week program under supervision of a Red Sealed Certified Chef. Students receive First Aid, WHMIS, Propane Handling and Food Handlers’ Certification.
Pinecrest Queensway Ottawa	Youth Retail Employment Program (YREP) - Service Excellence	YREP, a paid employment 22-week-long program is an opportunity to develop skills and experience working in the retail industry. This program consists of a 20-week work placement at a store and 120 hours of training. The participants work 27 hours per week and earn minimum wage while on placement and in training.
	Youth Retail Work Experience (YRWE) - Service Excellence	YRWE is a 10-week experience for youth aged 15-19 who are still in school. Participants volunteer 6 hours per week for eight weeks and receive 20 hours of employment-related training.

JVS Toronto - Markham Employment & Training Services	Retail/Sales/ Customer Service Training Program	This program provides training in customer service and sales through a combination of in-class instruction and paid placements, allowing individuals to increase self-confidence, meet retail job expectations and gain experience working in team environments.
MicroSkills	Women in Transportation	Pre-employment program which provides Service Excellence training to clients.
Women's Employment Resource Centre	Social Enterprise with Retail Store	Women create products and stock store by consignment.
Niagara College	Cook Apprenticeship	Two 15-week training sessions - Certificate of Apprenticeship at Niagara-on-the-Lake Campus.
Niagara College	Baker Apprenticeship	Two 15-week training sessions - Certificate of Apprenticeship.
Job Skills	Smart Start Program	Smart Serve, First Aid, WHMIS, funded by the Regional Municipality of York's Community Development and Investment Fund.
St. Charles Adult Centre	Chef Program	40-week training program combining 32-week in-class training and 8-week work placement.
Youth Opportunities Unlimited	WHMIS, Smart Serve, Service Excellence	Next Wave Youth Centre Programs and YOU in the Skill Centre.
YMCA Sudbury	WHMIS	Training available to youth and Ontario Works clients.
Sudbury Vocational Resource Centre	WHMIS, Smart Serve, Excellence in Customer Service - online training program	Training available to all clients accessing employment services.
Parry Sound Employment Services - Employment North	WHMIS, Customer Service Training	Training available to all clients accessing employment services.
Careerlink	WHMIS, Second Career	Training is available to all clients accessing employment services.
Durham Region Ontario Works	Hospitality Pathway Program	Available to all clients 18 years of age or older, out of school and needing to earn credits towards high school who are interested in employment within the hospitality industry.

The Centers for Employment & Learning	Smart Serve, WHMIS, In Good Hands	Training available to all clients accessing employment services.
CONTACT South Simcoe Community Information Centre	Blue Frog Café & Marketplace - social enterprise for youth, Youth Café & community kitchen	Blue Frog is a volunteer program for youth between the ages of 14-29 who are interested in getting real work experience in the retail and service industry. The program provides support to help youth clients with small business start-ups and entrepreneurs. Participants can also sell their products.
Employment Services Elgin	Training Kitchen at the Talbot Teen Centre	The training kitchen delivers food services training programs to prepare and have food available for meetings and social events. The program helps clients develop life skills.
Goodwill, The Amity Group	Retail Training Program	Available to clients who are interested in a career in the retail industry. Training is provided to clients who gain access to on-the-job training through Goodwill stores.
CSE Consulting	Customer Service/Retail Sales Pre-Employment program delivered at training centre in Brockville	A 16-week program to provide practical skills and equip individuals with the essential skills required to succeed in a customer service environment. Emphasis is placed on both hard and soft skills to offer the best advantage in the competitive labour market. The length of the program can be reduced and tailored to meet the needs of clients.
Community MicroSkills Development Centre	Cook Pre-Apprenticeship Program	Partnership program with Humber College and YMCA. Available to clients between the ages of 18 and 24, completed grade 12, out of school, ready for full time training and interested in Culinary Arts.

Ready to Work tourism pre-employment programs administered by OTEC include:

Organization	Program Offered	Program Description
Niagara Employment Help Centre	Tourism Bridging Program	4 week pre-employment training for internationally trained individuals. Graduates receive certificates for <i>emerit</i> Tourism Essentials, Service Excellence, WHMIS, Smart Serve & NFSTP, and complete the Canadian Workplace Essentials programming.
ACCES Employment		
National Capital Region YMCA-YWCA		
KEYS Employment Services		
Unemployed Help Centre of Windsor		
HT Hospitality Training	Pre-employment Training	4 week occupation specific program (<i>emerit</i> Line Cook and Housekeeping Room Attendant) for OW clients.
Correctional Service Canada	Pre-employment Training	Hospitality and tourism employability training within the institutions provide key certifications in <i>emerit</i> Tourism Essentials, Service Excellence, WHMIS, Smart Serve & NFSTP.
Metis Nation of Ontario	Pre-employment Training	10 week pre-employment training program which upon completion graduates receive certificates for <i>emerit</i> Tourism Essentials, Service Excellence, WHMIS, Smart Serve & Food Safety.

WORKFORCE SKILLS ASSESSMENT

Currently the Canadian labour force is experiencing a significant skills shortage, which has left many jobs vacant. This is in part due to an aging population that is retiring and a change in the requirements of the labour market, advancements in technology, increased pressure related to productivity, and updates to legislation regarding health and safety standards (Ontario Literacy Coalition, 2011).

Entry-level jobs that were once thought to require basic skills are now much more complex with the increasing implementation of new technologies. Front-line positions commonly require the use of digital equipment, thinking skills and scientific devices (Ontario Literacy Coalition, 2011). Such advances are thought to make the jobs easier, however, research indicates that front-line workers generally do not have the skills required to carry out their duties (Miner, 2010).

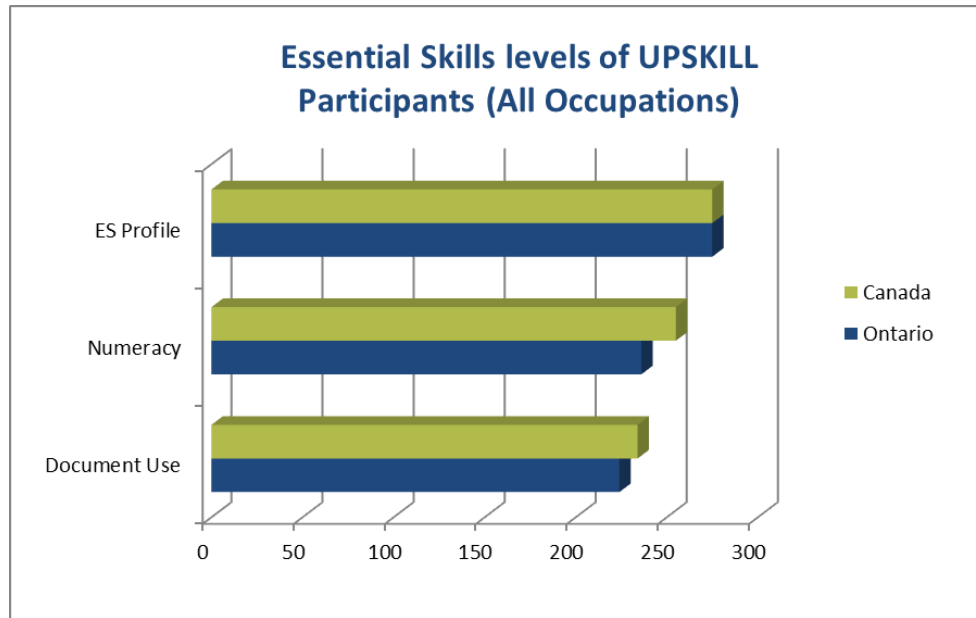
Front-line jobs that were once filled with “unskilled” workers now require more complex knowledge, and in many circumstances a higher education (Ontario Literacy Coalition, 2011). Dr. Rick Miner (2010) suggests that by 2031, 77% of jobs in the labour market will require workers to have gained post-secondary education or equivalent training. Workers are, and will continue to be expected, to be more tech-savvy in order to use, access, and interpret digital information required by front-line positions (Ontario Literacy Coalition, 2011). The demand for

more advanced worker knowledge and skills has resulted in the development of a major vacancy within the workforce, particularly with front-line workers.

In order to accommodate for the growing number of workers already in, and approaching retirement, particularly the baby boom generation, Canada's workforce needs to rely on the immigrant population that are experienced and able to work (Conference Board of Canada, 2007). This represents a major hurdle to overcome, as it is often difficult to interpret foreign credentials as equivalent to those acquired by workers trained within Canada (Miner, 2010). Another challenge faced when employing trained and skilled immigrants is eliminating language barriers. It is estimated that less than 75% of recent immigrants are able to find employment as a result of inadequate English language and literacy skills (Statistics Canada, 2008). In order to sustain the Canadian workforce, it is essential to implement a plan to fill the gaps in jobs with foreign-trained workers, as the Canadian-born population is not sufficient enough to do so.

In Ontario, the workforce is demonstrating a shift to a labour market that demands essential literacy and digital skills from all workers. Research estimates that 40% of the current workforce in Ontario lack the necessary skills required for their jobs (Statistics Canada, 2003). If continued, this trend of insufficiently skilled workers could have a detrimental impact on Ontario's future workforce. It is estimated that over the next five years, 65% of all new and replacement jobs will require some form of higher education (Miner, 2010). If education and training programs are not created, it is projected there will be a shortage of 364,000 workers by 2025 just in the province of Ontario (The Conference Board of Canada, 2007). As a result, workforce development programs in Ontario are currently, and will continue to be required, to ensure that workers have the skills necessary to complete their jobs.

OTEC has been working on a national essential skills training and demonstration project with the Social Research and Demonstration Corporation (SRDC) called UpSkill: Essentials to Excel, to shed further light on these issues. In 2011-12, OTEC's research team conducted essential skills assessments with 54 front-line hotel workers in five hotels from across the province. Preliminary results indicate that, within the sample of hotels, average skill levels in numeracy and document use fell significantly below the national Essential Skills profile for those occupations and marginally below the average levels recorded amongst 315 workers assessed in British Columbia, Saskatchewan, Newfoundland, and, New Brunswick (Social Research and Demonstration Corporation, 2011).

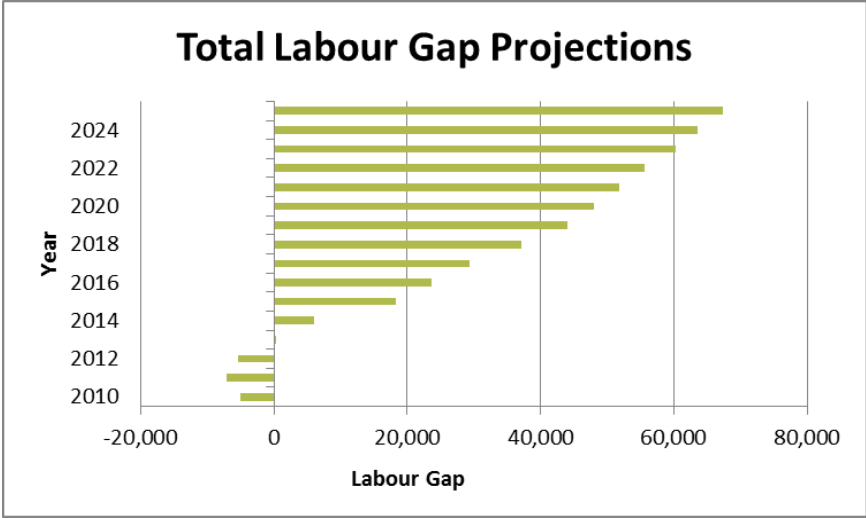


Source: Social Research and Demonstration Corporation (2011). "UPSKILL: Essentials to Excel: Early Analysis". Unpublished Technical Paper. SRDC, Ottawa.

SECTION 5: LABOUR MARKET INDICATORS

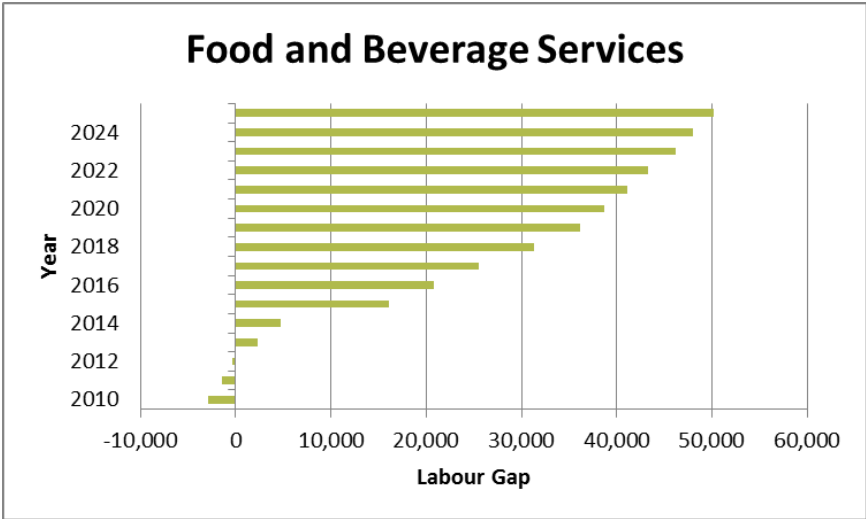
Shortage Projections

Due to our aging population and progressively lower birth rates, Ontario will start to experience a severe skills shortage in the near future. The Tourism and Hospitality industry is no exception. The economic recession of 2008-09 eased labour shortages throughout the country, providing a temporary reprieve from the tight labour markets seen in the years leading up to the downturn. But as economic conditions improve, labour shortages will re-emerge and worsen progressively over the long term. Estimates suggest Ontario's tourism sector experienced a surplus of labour in 2011 equivalent to about 7,100 full-year jobs (2012 Update to the Future of Canada's Tourism Sector, Preliminary Data, CTHRC, 2012). However, market conditions are expected to gradually improve in 2012. As a result, labour shortages in the province's tourism sector are projected to return by 2013 (See total Labour Gap Projections below).

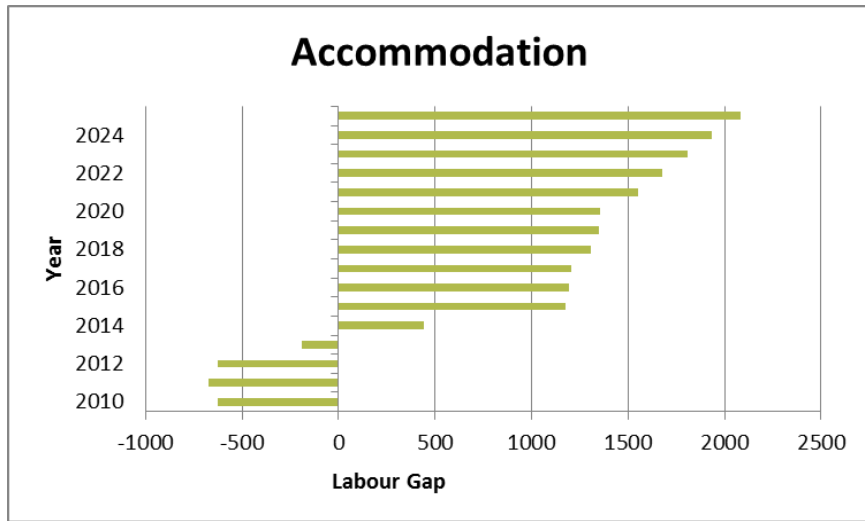


Source: Preliminary Data from 2012 Update to the Future of Canada’s Tourism Sector Report (CTHRC and Conference Board of Canada, 2012).

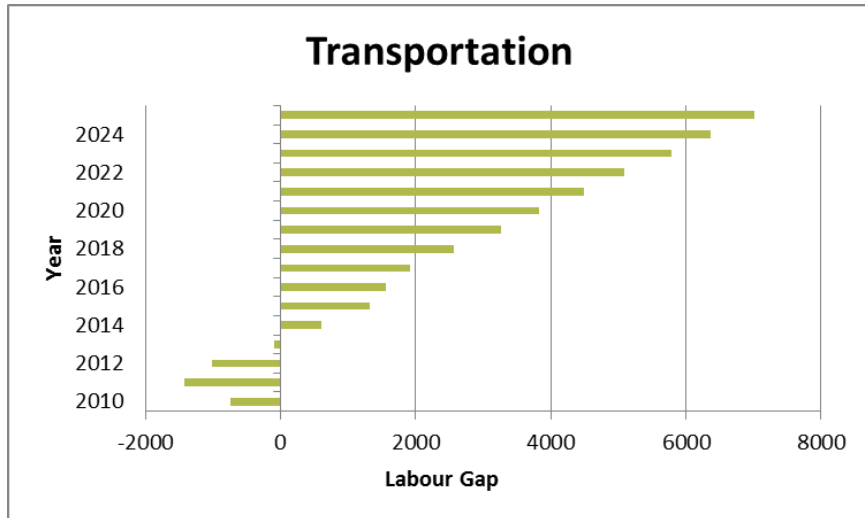
The labour shortages are projected to be the most significant in the province’s Food and Beverage Services industry, as shortages could rise to more than 50,200 full-year jobs by 2025.



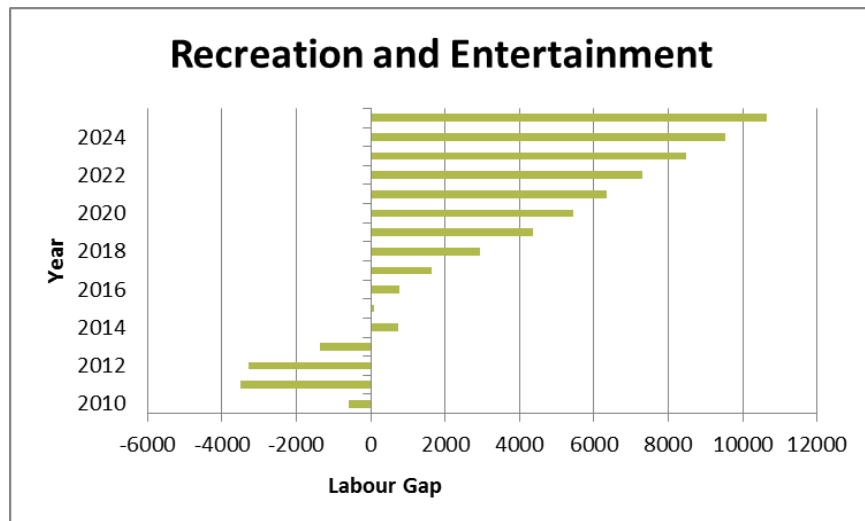
The shortage of labour in Ontario's Accommodation industry could grow to nearly 2,080 full-year jobs by 2025.



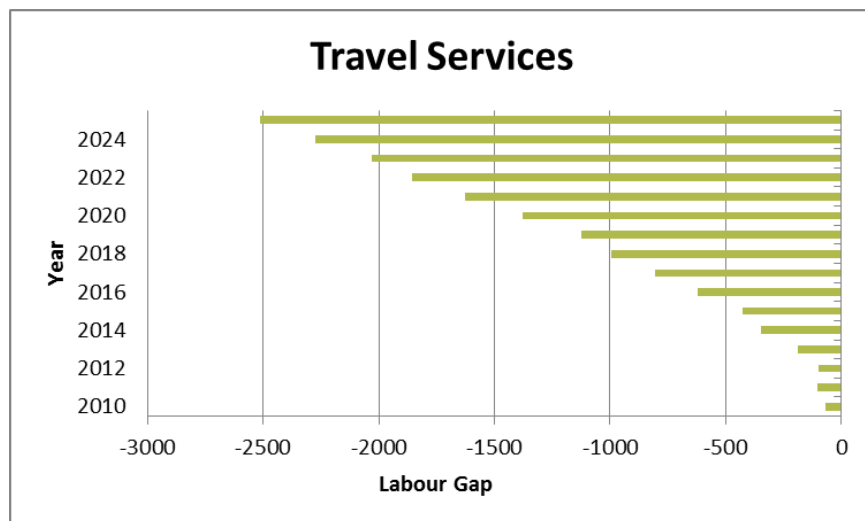
The labour shortage in the province's Transportation industry could surpass 7,010 full-year jobs by 2025.



The province's Recreation and Entertainment industry could experience a shortage equivalent to about 10,660 full-year jobs by 2025.



Travel Services is the only tourism industry group in Ontario not expected to see a significant shortage of labour over the long term.



Demographics of the Labour Market

Ontario's tourism sector consists of five component industry groups (accommodation, food and beverage services, transportation, recreation and entertainment, and travel services). Every five years as new census data is made available, the Canadian Tourism Human Resource Council, produces the "Demographic Profile of Tourism Sector Employees" report. The following table presenting a profile of the Ontario tourism labour market was developed using specialized tabulations from the 2006 Census and offers demographic statistics for the industry groups within the tourism sector.

Within the tourism sector as a whole, the distribution of female (52%) and male (48%) workers is almost equal. Over half of those employed in tourism fall within 15 to 24 years of age (34%) and 45 years and over (30%).

Demographic Characteristic	Provincial Tourism Sector	Accommodation	Food and Beverage Services	Recreation and Entertainment	Transportation	Travel Services
Sex						
Female	51.8%	59.8%	58.4%	47.2%	30.4%	71.1%
Males	48.2%	40.2%	41.6%	52.8%	69.6%	29.0%
Age						
15 to 24 years	33.7%	23.7%	48.9%	28.7%	5.1%	12.1%
25 to 34 years	18.2%	18.5%	17.6%	20.5%	15.2%	23.6%
35 to 44 years	18.9%	19.9%	15.0%	19.7%	27.2%	25.8%
45 years and over	29.3%	37.9%	18.5%	31.1%	52.5%	38.6%

Source: Canadian Census 2006, Customized tabulation. "Demographic Profile of Tourism Sector Employees". CTHRC, 2010.

Within the tourism industry groups, food and beverage services had the youngest labour force. In 2006, nearly half (49%) of the people working in food and beverage services fell within the 15-24 age group, followed by 28% of the people working in recreation and entertainment. In 2006, 37% of people working in the tourism sector in Ontario self-identified with an equity group: 23% identified as a visible minority, 2% identified as an Aboriginal person, and 12% identified as a person with a disability. New Canadians also have a strong presence in Ontario's tourism labour force, with 30% of the provincial tourism labour force born outside of Canada.

Demographic Characteristic	Provincial Tourism Sector	Accommodation	Food and Beverage Services	Recreation and Entertainment	Transportation	Travel Services
Place of Birth						
Born in Canada	70.3%	65.6%	68.7%	80.0%	65.3%	59.4%
Born outside Canada	29.7%	34.4%	31.3%	20.0%	34.7%	40.6%
Equity Groups						
Total visible minority population	23.3%	24.7%	27.3%	13.5%	23.8%	28.2%
Aboriginal identity population	2.1%	2.8%	2.0%	2.1%	2.0%	0.8%
Population with disabilities	12.4%	13.9%	11.2%	11.8%	16.0%	12.0%

Source: Canadian Census 2006, Customized tabulation. "Demographic Profile of Tourism Sector Employees". CTHRC, 2010.

Changing Demographics

Of all newcomers to Canada working in the tourism sector, 47% are found in Ontario, however proportionally, 30% of the Ontario's total tourism workforce were born outside of Canada. Of Toronto's total tourism labour force, 50% of workers were born outside of Canada. In aggregate, one-third of foreign-born tourism workers are found in Toronto (Newcomers to Canada Employed in Tourism, CTHRC, 2010). Of pressing concern to the labour market, is the imminent transition of the baby-boomers into retirement. This transition will substantially increase the labour shortages in the tourism sector over the next few years and increase the tourism sector's dependence on immigration to meet the labour demand. In 2007, "data from Statistics Canada reveal that by 2011 immigration will account for 100% of Canada's net labour force growth and all net population growth in the next 25 years." (Ikura, 2007)

Additionally, a quarter of all Aboriginal persons employed in tourism across the country work in Ontario, while, four in ten people with disabilities employed in tourism, work in Ontario.

Tourism Employment and Compensation

The Human Resource Module (HRM) of the Tourism Satellite Account for Ontario is a study developed by Statistics Canada in collaboration with the Canadian Tourism Human Resource Council and the Ontario Ministry of Tourism & Culture. This study provides detailed information on employment related to tourism in Ontario (see Table 1, Table 2 and Table 3).

The preliminary data for the recent update to the 2010 HRM revealed that tourism industries in Ontario generated a total of 608 thousand full-year jobs in 2010. This includes both full-time and part-time jobs, as well as employee jobs and jobs from self-employment. The tourism sector accounted for 9.0% of all jobs in Ontario in 2010. In 2002, prior to SARS, it accounted for 9.8% of all jobs in Ontario.

According to the update to the 2010 HRM, compensation reached \$18 billion in 2010 for tourism industries in Ontario, increasing 4.2% from the previous year, which is a higher growth rate than for the total economy in Ontario (see Table 1).

Table 1 Total compensation, jobs, tourism industries and total economy, Ontario, 2003 to 2010										
	2003	2004	2005	2006	2007	2008	2009	2010		percent change 2009 to 2010
Compensation in Ontario	millions of dollars									
Total tourism industries, Ontario	14,676	15,357	15,323	16,150	16,777	17,442	17,327	18,050		4.2
Total economy, Ontario	275,754	290,927	304,094	318,601	333,164	342,143	338,843	352,324		4.0
Number of jobs in Ontario	thousands									%
Transportation	71	70	69	75	78	79	81	80		-0.3
Accommodation	69	67	69	68	66	64	65	69		7.2
Food and beverage	337	337	336	334	333	337	333	337		1.3
Recreation and entertainment	105	115	106	105	105	104	102	103		0.6
Travel services	19	19	19	19	19	18	19	18		-5.8
Employee	550	563	555	557	554	557	555	561		1.1
Self-employed	50	46	43	44	46	46	44	46		3.8
Full-time	363	366	354	353	354	356	352	344		-2.3
Part-time	238	243	245	248	246	247	247	264		6.6
Total tourism industries, Ontario	600	609	599	601	601	603	600	608		1.3
Total economy, Ontario	6,336	6,430	6,532	6,626	6,732	6,796	6,638	6,770		2.0

Among the tourism industry groups, the food and beverage sector was the largest employer in 2010, with 337 thousand jobs, accounting for 55.4% of all jobs in tourism industries in Ontario. Recreation and entertainment was the second largest employer in 2010, with 103 thousand jobs, accounting for 16.9% of all jobs in tourism industries in Ontario (See Table 1).

Table 2 Total average weekly hours worked, tourism industries and total economy, Ontario, 2003 to 2010										
	2003	2004	2005	2006	2007	2008	2009	2010		percent change 2009 to 2010
Average weekly hours worked in Ontario per job										%
Transportation	35.5	35.2	34.2	34.7	32.9	34.6	33.4	32.9		-1.5
Accommodation	32.9	33.2	32.7	32.1	32.3	32.0	30.7	29.8		-2.9
Food and beverage	28.3	28.9	28.1	28.3	27.6	27.9	26.8	26.4		-1.5
Recreation and entertainment	29.5	30.0	29.8	29.6	29.7	29.3	29.7	28.1		-5.4
Travel services	34.1	35.9	35.5	35.0	34.7	34.2	36.2	35.0		-3.4
Employee	29.3	29.8	29.3	29.4	28.7	28.9	28.3	27.6		-2.2
Self-employed	38.7	38.7	38.0	37.9	38.3	38.4	37.2	35.2		-5.3
Full-time	39.4	40.0	39.3	39.8	38.9	39.2	38.4	38.0		-1.2
Part-time	15.9	16.3	16.4	16.1	15.8	15.8	15.3	15.5		0.7
Total tourism industries, Ontario	30.1	30.5	29.9	30.0	29.4	29.6	28.9	28.2		-2.5
Total economy, Ontario	33.7	34.0	33.7	33.7	33.6	33.4	32.8	33.0		0.4

Table 3 Total average average hourly compensation, tourism industries and total economy, Ontario, 2003 to 2010										
	2003	2004	2005	2006	2007	2008	2009	2010		percent change 2009 to 2010
Average hourly compensation in Ontario per job										%
Transportation	27.22	28.41	28.63	27.91	29.21	28.75	28.84	29.47		2.2
Accommodation	14.55	15.53	16.39	17.78	19.34	20.12	19.23	20.13		4.7
Food and beverage	10.99	11.10	11.81	12.16	13.12	13.70	14.76	15.51		5.1
Recreation and entertainment	20.43	19.82	20.43	22.16	22.43	23.33	23.07	25.46		10.4
Travel services	19.75	20.38	20.80	21.81	23.11	25.10	21.21	23.67		11.6
Employee	15.75	15.95	16.64	17.34	18.45	19.00	19.51	20.54		5.3
of which wages	14.02	14.06	14.67	15.28	16.40	16.87	17.43	18.30		5.0
Self-employed	14.49	15.35	14.73	16.05	16.42	16.84	16.41	17.54		6.9
Full-time	16.86	17.16	17.83	18.41	19.35	20.08	20.33	21.60		6.2
Part-time	10.91	11.24	11.77	13.02	14.38	14.17	15.28	16.02		4.9
Total tourism industries, Ontario	15.62	15.90	16.47	17.22	18.25	18.79	19.22	20.26		5.4
Total economy, Ontario	24.86	25.58	26.57	27.47	28.36	29.02	29.90	30.37		1.6

SECTION 6: INDUSTRY TRENDS AND PERCEPTIONS

Industry Perceptions of the Labour Market

2012 Workforce Development Survey Findings

Ontario's workforce plays a vital role in the tourism and hospitality industry. How industry perceives this role, and the current state of the labour market, will be reported in this section. The online survey completed by Industry Tourism and Hospitality Organizations, Sectoral Associations, Regional Tourism Organizations (RTO's) and Destination Marketing Organizations (DMO's) creates a clearer picture of how industry perceives workforce development in Ontario.

When asked to list the most significant issues facing the tourism and hospitality industry today, the top 3 issues identified by businesses were:

- The Economy
- Labour Issues (e.g. lack of skilled workers, high cost of labour, aging workforce)
- Lack of Customers

The economy was listed by 34% of businesses respondents, followed by **labour issues** (28%) and lack of customers (25%).



Source: OTEC Industry Workforce Development Survey, January 10, 2012

The RTO's top 3 issues facing the tourism and hospitality industry were:

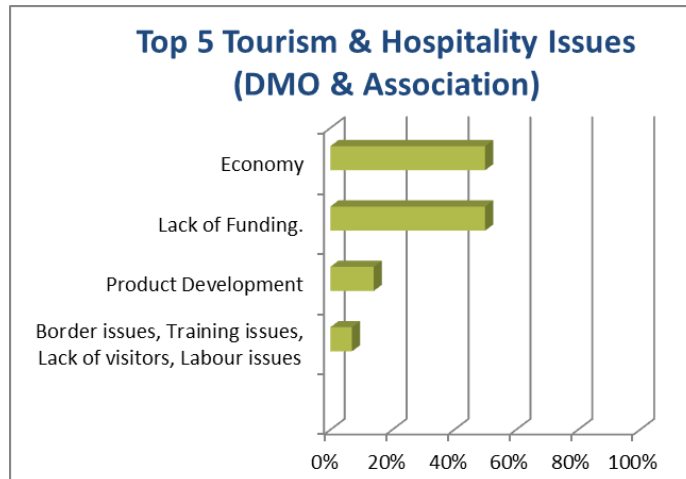
- Lack of Visitors
- Lack of Funding, Labour Issues, and the Economy
- Border Issues

Lack of visitors was the top issue (67%), followed by the economy, **labour issues** and lack of funding (33%), and lastly border issues (22%).



Source: OTEC RTO Workforce Development Survey, January 10, 2012

DMO's and Association respondents also listed the economy (50%) as one of their top issues, tied with lack of funding (50%), followed by product development (14%) and training issues, **labour issues** and lack of visitors (7%).



Source: OTEC DMO & Association Survey, January 10th 2012

Industry Priority Workforce Development Issues

Industry Priorities

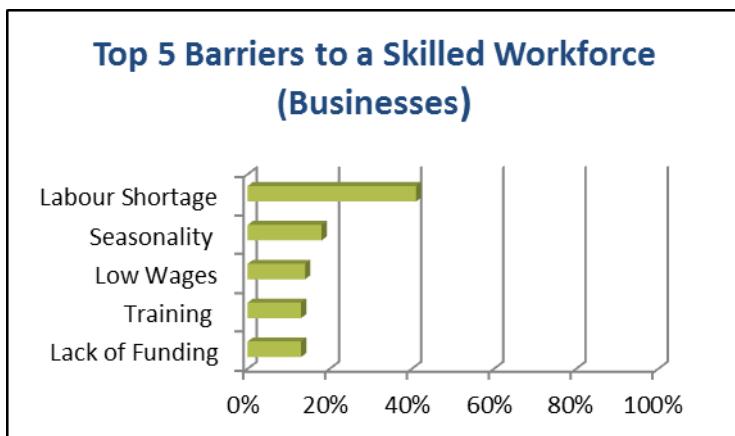
Many barriers exist that prevent the development of a readily available and adequately trained workforce. These barriers were identified by businesses, RTO's, DMO's and Associations, along with their workforce development priorities, and the results will be discussed in this section.

Barriers to Building a Skilled Workforce

Businesses were asked to list the barriers/challenges to building a skilled workforce in their organization. The top three issues identified by tourism & hospitality businesses were:

- Labour Shortage (41%)
- Seasonality of the Industry (18%)
- Low Wages (14%)

Other barriers listed by businesses include: training issues (13%), lack of funding (13%), turnover (8%), and geography (8%).

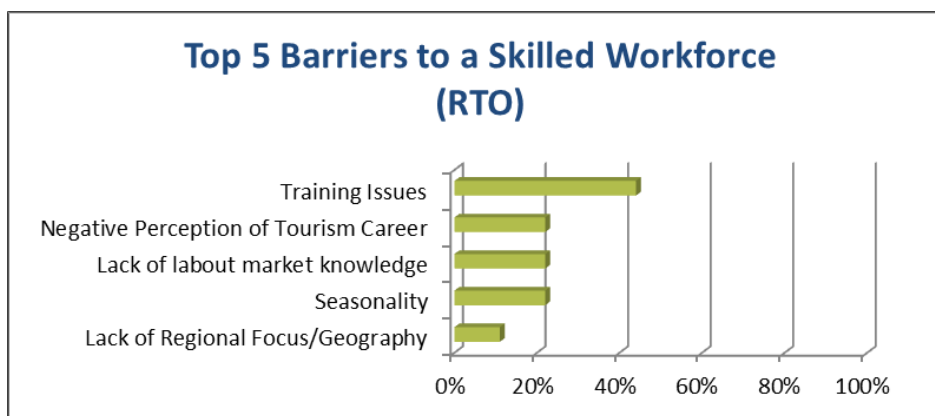


Source: OTEC Industry Workforce Development Survey, January 10, 2012

RTO's listed their top three barriers to building a skilled workforce in their region as:

- The cost of training and lack of available training resources (44%)
- Negative perception of careers in tourism/seasonality/lack of labour market knowledge
- Lack of recent focus/geography (remote locations)

Training issues ranked the highest (44%), with negative perceptions of careers in tourism, seasonality and lack of labour market knowledge all tying for second (22%). Other barriers that were listed include: lack of recent focus and geography (11%).



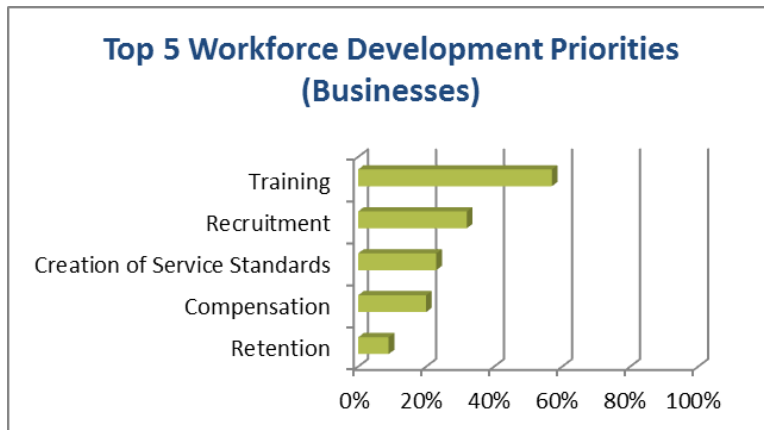
Source: OTEC RTO Workforce Development Survey, January 10, 2012

DMO's and Associations also listed training issues and the negative perception of tourism as a career (40%) as their top two barriers to building a skilled workforce. Other barriers listed include: seasonality (20%), lack of funding (20%), and labour shortage (10%).

Tourism and hospitality businesses listed their top three workforce development priorities as:

- Training (57%)
- Recruitment (45%)
- Creation of Service Standards (23%)

Businesses revealed a variety of other workforce development priorities including: compensation (20%), retention (9%), employment bridging programs (4%), education (4%) and labour market research (4%).

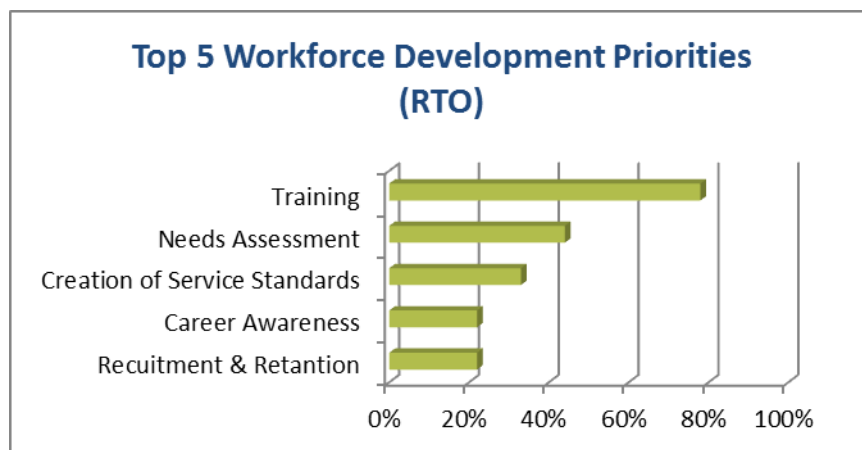


Source: OTEC Industry Workforce Development Survey, January 10, 2012

RTO's listed their top three workforce development priorities as:

- Training (78%)
- Needs Assessments (44%)
- Creation of Service Standards (33%)

Other workforce development priorities listed include: career awareness (22%) and recruitment & retention (22%).



Source: OTEC RTO Workforce Development Survey, January 10, 2012

DMO's and Associations top priority was also training (60%), however they placed recruitment and retention (40%), as their second priority, followed by meeting accessibility requirements (20%).

Premier Ranked Tourist Destination Framework

The Premier Ranked Tourist Destination Framework (PRTDF) program was an initiative developed by the Ontario Ministry of Tourism. The goal of the PRTDF program was to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage, and ultimately improve to become a destination of choice. The OTEC research team reviewed Premier Ranked Destination reports dated from 2004-2010. Most of the destinations (82%) identified that consistent customer service and training within their destination was a priority. Only two destinations identified other workforce development issues – labour shortages particularly in the fall when students return to school, and the need to develop a destination human resource strategy, as a priority in their Premier Ranked findings.

Industry Training and Workforce Development Activities

Training is the most prominent current workforce development activity identified as being completed by the Ontario tourism and hospitality industry, followed by participation in compensation reviews and studies.

Survey Findings:

- 43% of Industry respondents have a workforce development strategy currently in place at their organization.
- 74% of Industry respondents completed workforce development activities in the past year. Current activities and long-term planned activities are the same.

Training activities	53% (customer service was the #1 response at 37%)
Compensation review/study	17%
Labour market research	5%
Recruitment events	5%
Temporary Foreign Worker/ Student Worker initiatives	5%

When asked about workforce development activities in 2011, 53% of respondents identified training. However, when respondents were specifically asked about training, 100% answered that their organization provided training to employees.

Training provided by Industry:

- Formal training only 5%
- Informal training only 31%
- Combination of Formal/informal 64%

Half of industry respondents provide compliance-type training (e.g. food safety, WHMIS) and 57% of industry respondents provide non-compliance training (e.g. customer service).

Training Programs offered to employees identified by industry respondents include:

- Smart Serve 18%
- WHMIS 10%
- Food Safety 10%
- Health and Safety 5%

Workforce Development Initiatives industry respondents currently participate in:

Bridge to work pre-employment funded projects	4%
Regional skills gaps research and analysis	6%
Regional labour market supply/demand studies	15%
Career pathway mapping	10%
Regional compensation studies	17%
Regional worker demographic studies	8%
Employer incentive programs (e.g. training credits)	16%
Human Resource branding	9%
Creation of regional service standards	9%
Adoption of national occupational standards	9%
Career awareness events to promote careers	26%

71% of industry respondents have budget allocated towards workforce development:

60% of respondents	0-9% of budget
10% of respondents	10-19% of budgets

Training Suppliers identified through survey: Smart Serve (18), local health department (3), OTEC (3), TIAO/ACCESSIBILITY (2), RTO online customer service program (2), Local Economic Development office or DMO (2), WBEY (1), EDCO (1), Flexco (1), NAAP (1), Contact North (1), and Chambers of Commerce (1).

Network and Association Training and Workforce Development Activities

REGIONAL TOURISM ORGANIZATIONS (RTO'S)

Overview: The Regional Tourism Organizations (RTO's) are newly formed and most do not have a workforce development strategy in place at this time. In 2011, WFD activities predominately included customer service training initiatives.

2011 workforce development initiatives included:

Customer Service Training	30%
Other	10% (Cycle Tourism, Meetings & Convention Toolkit)
Nothing	60%

In the next two years, approximately 80% of the RTO's plan to offer training (customer service, destination) and 40% of the RTO's plan to develop a formal workforce development strategy.

The RTO's long-term plans, the next 3-5 years, include the following WFD initiatives:

- 40% Training (customer service, packaging, destination training)
- 20% Execution of a regional WFD strategy
- 10% Develop customer satisfaction standards and measurement tools
- 30% No answer, not sure

Although only 30% of RTO's identified that they participated in training initiatives in 2011, when prompted, 50% of RTO's identified that they provide training to their regions.

At this point in time, it does not appear that RTO's are participating in any of the following workforce development activities.

Workforce Development Initiatives

Bridge to work pre-employment funded projects	0%
Regional skills gaps research and analysis	0%
Regional labour market supply/demand studies	0%
Career pathway mapping	0%
Regional compensation studies	0%
Regional worker demographic studies	0%
Employer incentive programs (e.g. training credits)	0%
Human Resource branding	0%
Creation of regional service standards	0%
Adoption of national occupational standards	0%
Career awareness events to promote careers	0%

DMO'S/ASSOCIATIONS:

DMO's and Associations have been in place for many years and although workforce development activities are secondary to activities such as marketing and product development, 20% of DMO's and Associations identified that they have a workforce development strategy currently in place. Training plays a key role in the current WFD initiatives offered to their members. DMO's/Associations often include WFD topics in their newsletters and annual conferences.

DMO's and Associations identified the following WFD activities for 2011:

Service Training	64%
Compensation Study	20%
Social Media Training	20%
Nothing	10%
*Other	10%

*Training and workshop topics included: attracting investment, investment readiness, destination product knowledge, culinary tourism, sports tourism, and group tours.

Over the next 3-5 years DMO's and Associations plan to execute the following initiatives:

Training (service, technical, social media)	50%
Workforce development strategy	20%
Other	10% (employee recruitment program)
Nothing	30%

DMO's and Associations identified that they are participating in the following workforce development initiatives.

Workforce Development Initiatives

Bridge to work pre-employment funded projects	20%
Regional skills gaps research and analysis	30%
Regional labour market supply/demand studies	30%
Career pathway mapping	20%
Regional compensation studies	20%
Regional worker demographic studies	40%
Employer incentive programs (e.g. training credits)	30%
Human Resource branding	20%
Creation of regional service standards	20%
Adoption of national occupations standards	10%
Career awareness events to promote careers	50%

Industry Led Relationships with Workforce Development/Education Networks

The Ontario Tourism and Hospitality Industry have relationships with workforce development and education networks. Although high schools, universities and economic development organizations were mentioned from time to time, the strongest relationship appears to be with the college network.

Industry Relationships and Partnerships:

37% of industry respondents participate in curriculum development with their local college, university and/or community serving agencies. Partners identified include: Algonquin College, Georgian College, La Cite Collegiale, City of Ottawa, Canadore College, Fleming College, ITHQ, Lanark Highlands Business and Tourism Association, OTHP, Land o' Lakes Tourism, Loyalist College, University of Guelph, Conestoga, Ottawa Valley Tourist Association (OVTA), Lambton College, Fanshawe College, BIA's, George Brown College, Niagara College, Seneca College, Humber College, Confederation College, Selkirk College (BC), Mohawk College, high schools, economic development, community futures.

RTO Relationships and Partnerships:

30% of RTO's identified that they are working with their local community college on tourism curriculum development.

DMO and Association Relationships and Partnerships:

30% of DMO's and Associations identified that they work with education partners including most Ontario colleges. The Ontario Restaurant Hotel Motel Association (ORHMA) appears to have the most formal workforce development partnerships in place including e-Cornell for management training, HRdownloads.com, Train Can for food safety training and certifications, WHMIS online learning, Heaven Can Wait first aid training and certifications, OTEC training and *emerit* certifications, Smart Serve, Accessibility best practices templates and case studies. Ontario Snow Resorts Association has formal relationships with Georgian College and Selkirk College (B.C) for snow resort operations and with OTEC for industry standards and training.

The Tourism Industry Association of Ontario (TIAO) partnered with OTEC with funding from the Accessibility Directorate to create a program to help train the Tourism and Hospitality Industry to better serve people with disabilities. 22 workshops were delivered throughout Ontario in 2010-2011, training 378 tourism business owners and managers.

Workforce Planning Boards:

19% of industry survey respondents participate in workforce planning with their regional workforce planning board. Activities include: Discussions regarding challenges such as skills gaps (1), Employer surveys (2), Job Fairs (1), and meetings (2).

30% of RTO's currently work with, or plan to start working with, their regional workforce planning board on workforce development regional initiatives, needs assessments and strategies.

SECTION 7: HUMAN RESOURCE ORGANIZATION / SECTOR COUNCIL TRENDS AND PERCEPTIONS

Perceptions of the Labour Market

A provincial organization exists in Ontario to undertake the development and coordination of workforce development activities, and to support the tourism and hospitality industry with priorities related to labour market and skills development. This organization plays a dual role representing Ontario nationally, as well as provincially as the Provincial Tourism Human Resource Organization (HRO) and sector council representative on the Canadian Tourism Human Resource Council (CTHRC). Created in 1991, this organization, the Ontario Tourism Education Corporation (OTEC), is an independent, not for profit organization, which provides training and human resource solutions and workforce development initiatives for Ontario's tourism and hospitality sector.

Priority Workforce Development Issues

Through working closely with industry, OTEC perceives that the following industry issues and priorities exist:

- 1. Training and Standards:**
 - Ensuring consistent customer service standards and skills throughout all regions of Ontario to deliver excellent visitor experiences.
- 2. Labour Shortage:**
 - Preparing for current and future labour and skills shortages in many occupations and within many regions of Ontario due to demographic shifts and seasonality issues.
- 3. Recruitment and Career Awareness:**
 - Facilitated communications and connections required between industry, secondary, and post-secondary students, as well as non-traditional labour pools.
 - Promoting tourism and hospitality as a career to remain competitive with other sectors and to ensure access to the labour pool.
- 4. Funding:**
 - Access to affordable and accessible training to support skills development of both front-line and management level workers already employed in the industry.

Training and Workforce Development Activities

OTEC provides many programs and services to support and strengthen the tourism and hospitality industry with the following goals:

1. **Career Awareness:** Provides online career awareness planning tool and delivers career awareness presentations.
2. **Pre-employment & Bridge Training Programs:** Workforce and skills development projects to prepare new sources of labour through non-traditional labour pools for tourism and hospitality jobs (includes newcomers, Aboriginal groups, persons with disabilities, mature workers, youth, francophone communities, corrections system).
3. **Service Quality Standards:** Customer Service and Workforce Skills Development programs for industry, secondary and post-secondary education sector, private career colleges, employment and social services sectors.
4. **Customer Service Culture:** Customer service curriculum for secondary and post-secondary institutions and private career colleges; custom built blended learning and web-based learning customer service programs for industry; off the shelf training (40) programs include: Service Excellence and Building a Culture of Service Excellence Training programs.
5. **Ensuring Training Standards:** Certifying body for occupational standards and certifications and contributes to updates of 50 national standards and 30 occupational certification programs; Designated Trainer certification and industry and community recognition programs – Service Excellence Organization or Community Designations.
6. **Developing the Tourism Workforce:** Administers and disseminates labour market research and reports; develops regional human resource strategies and labour market development projects; creates and provides leadership, management and human resource tools.

Workforce Development Networks and Associations

OTEC links governments, education, industry, labour, employment services and associations and has strong networks at all levels of government and within multiple regions of Ontario to encourage partnerships, or to bring sources of funding to the sector for skills and workforce development initiatives.

National:

- Canadian Tourism Human Resource Council (CTHRC);
- Provincial or Territorial Tourism Human Resource Organizations (HRO's) across the country;
- Service Canada;
- Correctional Services Canada;
- Human Resources and Skills Development Canada (HRSDC);
- Citizenship and Immigration Canada;
- FedNor.

Provincial:

- Ministry of Tourism, Culture and Sport;
- Ministry of Training, Colleges and Universities; Employment Ontario Network;
- Workforce Planning Boards;
- Ministry of Economic Development and Innovation;
- Ministry of Education;
- Ministry of Community and Social Services;
- Ontario Ministry of Agriculture and Rural Affairs;
- Ministry of Northern Affairs;
- Ministry of Northern Development, Mines and Forestry.
- Provincial Tourism Associations;
- Metis Nations of Ontario; the Union of Ontario Indians.

Projects and initiatives include pre-employment training; bridging programs; literacy and essential skills programs; administering national occupational standards and certifications; delivering front-line customer service and management training workshops or blended learning programs; participating in consultations or in development of curriculum for secondary and post-secondary education sector; participating in research initiatives and disseminating research reports such as compensation and labour supply and demand research; deliver presentations to industry and education sector; initiate strategic projects to bring resources to industry.

Regional:

- Community Futures;
- Regional Economic Development,
- RTO's,
- DMO's;
- Employment Ontario networks;
- Workforce Planning Boards;
- Sagamok, Great Spirit Circle Trail;

- Le Réseau de développement économique et d'employabilité (RDEE);
- Public and Private Colleges, Universities.

Projects include: Facilitated training workshops; conference presentations; development of web-based learning programs; conference presentations; workforce development or bridging programs.

Local:

- Municipal Economic Development;
- Social Service Agencies;
- Employment Serving Agencies;
- Labour Unions;
- School Boards;
- Secondary Schools;
- DMO's;
- Chambers of Commerce.

Projects include: Facilitated training workshops; conference presentations; development of web-based learning programs; teacher training; career awareness activities; job development to connect employment and social service agencies with industry employers; workforce development and bridge training programs; career laddering programs; articulation agreements; and dual credential agreements in the education sector.

FORMAL PARTNERSHIPS/NETWORKS:

OTEC has formal partnerships with many industry sectoral associations, government bodies, DMO's, RTO's, education partners, research, and employment organizations to deliver workforce or skills development projects in various regions throughout Ontario.

- Key partnership agreement with the CTHRC (Canadian Tourism Human Resource Council) to deliver projects and initiatives that meet the mandates of this national sector council enables the provincial industry to have access to national resources and funding.

INDUSTRY CHANNELS:

OTEC actively communicates to, engages with, and supports industry through various channels:

- Industry Associations (11), RTO's (13) and DMO's (130);
- Specialist High Skills Tourism and Hospitality Schools (130) and Canadian Academy of Tourism Schools (30);
- Coordinates industry and education for participation in standards updates and research projects;
- Presentation at industry, association and education conferences;
- Participation on boards and advisory committees including the CTHRC, Tourism Toronto, Employment Serving Agencies, Labour, and Colleges;
- Connecting Ready to Work graduates with industry through Hospitality Human Resource Associations and outreach.

SECTION 8: EDUCATION AND WORKFORCE DEVELOPMENT SECTOR TRENDS AND PERCEPTIONS

Inter-Education Partnerships: Public High Schools

FORMAL PARTNERSHIPS/NETWORKS

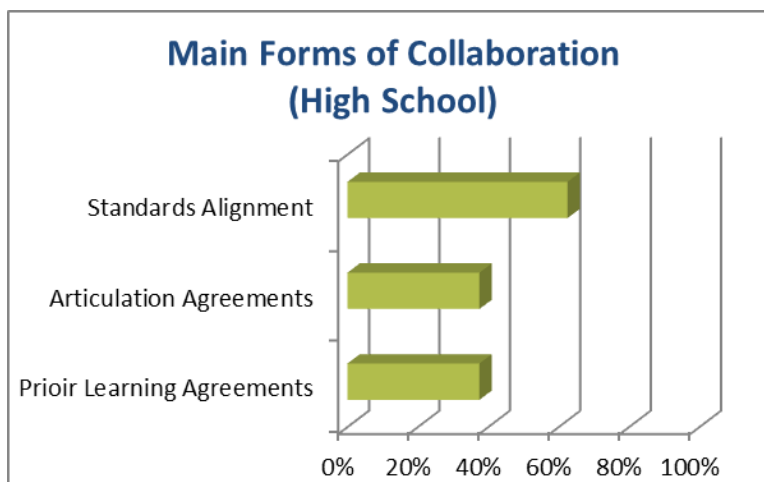
Public high schools were asked whether or not they collaborated with other educational pre-employment or workforce development institutions. The ranking of answers from this cohort was as follows: Yes, No, and Do Not Know.

Yes was noted by 55.6% of the respondents, whereas, 38.9% said no and, 5.6% said that they did not know.

When polled on the main forms of collaboration the ranked answers were:

1. Standards Alignment
2. Articulation Agreements
3. Prior Learning Recognition

Standards alignment was listed by 62.5% of the respondents with both articulation agreements and prior learning recognition having 37.5% each.



Source: OTEC Education Workforce Development Survey, January 10, 2012

The research results from the public high schools that responded to the survey, revealed that the Specialist High School Major (SHSM), the Ontario Youth Apprenticeship Program (OYAP), the Canadian Academy of Travel and Tourism Program (CATT) and the Canadian Tourism Human Resources Council (national *emerit* occupational standards) were the main programs to which standards were aligned.

Respondents reported that the main form of articulation agreement in the high schools was dual credentialing opportunities. This research cohort reported opportunities with colleges such as

George Brown, Seneca, Georgian, Humber Lambton, Boreal and La Cité Collégiale. Students obtained future college credits for work undertaken while still in high school.

The public high schools that responded to the survey revealed that organizations such as the Canadian Academy of Travel and Tourism (CATT) have agreements that offer accreditation for prior learning, based on academic courses previously undertaken. In addition, colleges may offer adult high school learners, exemptions for past industry work experience. This allows students who are successful at obtaining exemptions through prior learning agreements to complete their program in a shorter period of time.

Another form of agreement, which respondents noted in the survey, was contract agreements to deliver industry recognized programs to students. The suppliers of these programs include the tourism sector council – OTEC's Service Excellence and the York Region's Hospitality First program.

PROJECT INITIATIVES

The public high schools reported a variety of project initiatives in which they are involved. These include:

- **Canadian Tourism Human Resource Council National *emerit* Occupational Standards**
 - These standards developed by Canadian tourism and hospitality industry professionals describe the necessary knowledge, skills and attitudes required for competency in different tourism and hospitality occupations.
- **Student Success Programs**
 - These programs recognize that the needs, interests and strengths of all students are varied, and hence preparing students for success must be done in a heterogeneous manner. Examples of such programs are the Specialist High Schools Majors (SHSM), Cooperative Education and Dual Credit programs.
- **School Credit Work Initiatives (SCWI)**
 - Within this program students work towards high school and college education by pursuing a variety of dual credit programs. It is funded by both the Ministry of Education and the Ministry of Training, Colleges and Universities. It represents a co-operative effort of the Council of Ontario Directors of Education (CODE) and the Committee of College Presidents (COP).
- **Canadian Academy of Travel and Tourism (CATT) Certificate**
 - CATT is a free, national certificate program that offers high school students career-oriented training and certification programs while they achieve their high school diploma. Students learn the skills needed for a successful tourism career while exploring the industry further through tourism courses, experiential learning activities and work placement.

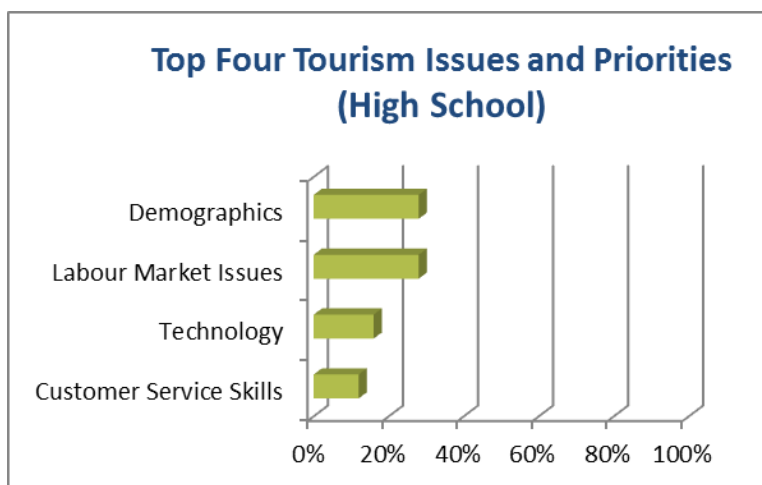
- **From Farm to Table**
 - This is an international program in which culinary students are given the opportunity to gain culinary skills and also an understanding of sourcing and using local food ingredients.
- **Reach Ahead Program**
 - Students (typically grade 7 and 8) are allowed to pursue grade 9 credits that will put them one step ahead when they enter high school.
- **Crown Ward Program**
 - This program is designed to assist students who have crown ward status pursue further education.

ISSUES AND PRIORITIES

When the open-ended question, “What do you think the most important issues and priorities in tourism workforce development are over the next 5 years? (i.e. demographics, changing technology, labour markets, etc.)” was posed to public high schools, the top four answers emanating from this group were:

1. Both demographics and labour market issues
2. Changing technology
3. Customer service skills

The frequency with which both demographics and labour market issues was cited by public high schools was 28%, followed by technological issues 16% and customer service skills 12%. This is demonstrated below on the chart.



Source: OTEC Education Workforce Development Survey, January 10, 2012

Pertaining to demographics this high school cluster commented on:

- The changing face of the tourist who visit Canada and their cultural expectations;
- The longevity affecting world population and special needs of the more mature tourist including their product expectations;
- The spending patterns of baby boomers and the discretionary income available to them.

As per labour market issues, public high schools commented on:

- The need for high quality paying jobs with benefits;
- An impending shortage of labour due to our changing demographics and the need to fill this labour gap;
- The need to provide students with the opportunity to acquire job experience with co-op or apprenticeship programs so that they will be prepared for the labour shortage.

Most respondents who cited technological change as an issue, did not proceed to explain what they meant. Those who did suggested that:

- Changing technology will impact upon tourists' knowledge of the products and how tourism products and services added value to the customer experience.

Those who commented on the need for customer service skills noted that:

- There was a need for customer service skills which foster better interpersonal soft skills and etiquette;
- Customer service skills must be relative to the needs of our tourism markets.

Other issues cited were:

- Attracting youth and presenting tourism as a worthwhile employment choice;
- Encouraging students to consider a career in the industry.

CUSTOMER SERVICE

Public high schools were polled on the availability of a customer service program as part of a provincial program at their institutions. The ranked answers were: Yes, No, and Do not know.

62.5% of the grouping that responded to the survey stated that there was a customer service program that was part of a provincial or national program, followed by respondents stating no; 25% and then those who did not know 12.5%.

A customer service program is a requirement of the Specialist High School Major (SHSM) and the Canadian Academy of Travel and Tourism (CATT) Program, with both requiring students to undertake studies in customer service. All but one of the respondents stated that tourism sector council - the Ontario Tourism Education Corporation (OTEC) delivers this program through Service Excellence program training. One respondent noted that York Region customer service program was the program of choice.

Education - Industry Partnerships: Public High Schools

FORMAL PARTNERSHIPS OR NETWORKS

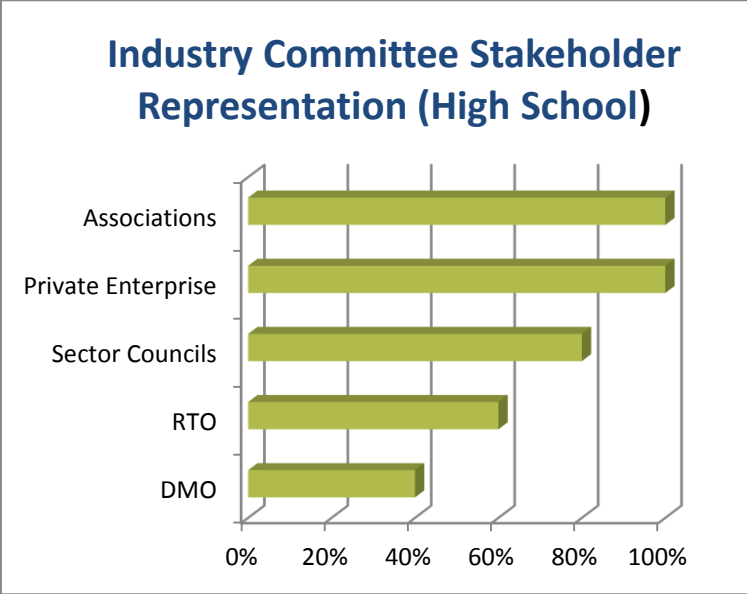
Formal partnerships or networks within public high schools were present, but not the norm. One of the chief partnerships was the formation of advisory groups or committees that assisted in curriculum development, determined the needs of the institution, provided guest speakers, facilitated co-op opportunities, provided labour market information and generally acted as a link to the sector or industry. When respondents were queried on the availability of an industry advisory committee at their institution, the ranked order of answers was as follow: No, Yes, and Do not know.

From the group of public high schools that responded to the survey 61.1% of respondents answered no, followed by yes 33.3% and 5.6% reported not knowing.

Where industry advisory committees existed, the stakeholders within these groups included:

- o Associations
- o Regional tourism organizations
- o Destination marketing organizations
- o Sector councils
- o Private enterprise

The chart below highlights the varying levels of participation that these stakeholders had with the advisory committees of secondary schools that responded to the survey.



Source: OTEC Education Workforce Development Survey, January 10, 2012

Additional industry organizations partnering with high schools include: workforce development organizations, economic development corporations, industry supported programs such as Passport to Prosperity, Ontario Youth Apprenticeship representatives, pre-employment organizations such as ACCES and KEYS and other industry community partners.

PROJECT INITIATIVES

Special project initiatives cited by the respondents from public high schools were those aimed at increasing the employability skills and potential of employment of mature students and specific target groups. The ranked results are presented below:

1. People with essential skills gap
2. People with a disability
3. Aboriginal students
4. New Canadians
5. Mature students

Programs for people with essential skills gap had a frequency of 56.3%, people with a disability 37.5%, both new Canadians and Aboriginal students 25%, followed by mature students with 24%.

INDUSTRY CHANNELS

A variety of channels were employed by public high schools to connect with the industry. These were accessed either electronically, or in person, through the internet, involving information downloads, or in person at meetings, or via the telephone. The channels used by respondents included, but are not limited to:

- Labour market information
- Educational standards
- Learning outcomes emanating from various government bodies
- Guest speakers
- Industry advisory groups
- Industry visits
- Employer feedback about students involved in experiential learning activities (co-op, apprenticeship, job shadow, volunteer placements and others)
- Community advisory groups
- Trade journals
- Magazines
- Employer websites
- Career counselling departments
- In-house educational committees
- National *emerit* occupational standards
- Career awareness resources i.e. Discovertourism.ca

Inter-Education Partnerships: Public Colleges

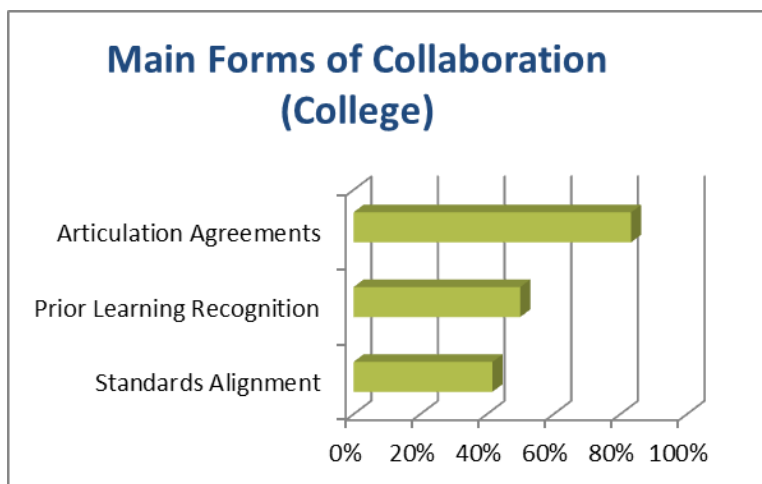
FORMAL PARTNERSHIPS /NETWORKS

Similar to public high schools in Ontario, most of the public colleges, that responded, collaborated with other educational, pre-employment or workforce development institutions. However, within this research cohort more collaboration took place. When polled on collaborating, the ranked answers were as follow: Yes, No, and no one reported not knowing. Out of the 15 respondents, 86.7% said yes, whereas only 13.3% said no.

The ranking of the main mechanisms of collaboration were as follow:

1. Articulation Agreements
2. Prior Learning Recognition
3. Standards Alignment

83.3% cited articulation agreements as their main collaboration vehicle, whereas, 50% of the respondents noted that their institution gave accreditation for prior learning and 41.7% of the responses noted that they participated in standards alignment.



Source: OTEC Education Workforce Development Survey, January 10, 2012

- The public colleges who responded to the survey reported that their articulation agreements, which help foster professional development and transfers, were undertaken with other institutions of higher learning such as Griffith University, Athabasca University, Michigan University, University of Guelph, Thompson Rivers University and University of Calgary.
- Amongst colleges that do not have formal articulation agreements, Prior Learning Recognition (PLR) gives accreditation for prior work done elsewhere. PLR is a process that helps learners to demonstrate and obtain recognition for previously acquired learning.
- The Travel Industry Council Ontario (TICO) educational standards, national *emerit* occupational standards, Canadian Institute of Travel Counselors (CTC) and the Ontario Youth Apprenticeship Program (OYAP) standards were presented as standards to which colleges that responded to the survey, aligned their curricula.
- Another popular mechanism of collaboration within this surveyed group was student exchange programs. In such a program, students visit a Canadian or foreign institution and pursue credit courses at the host institution. These courses count as part of the credit fulfillment requirements at the home college. Most of the survey respondents from this cohort participated in such arrangements.
- In the tourism and hospitality field, one respondent noted that partnering with hospitality associations was a popular vehicle of collaboration for the public colleges.

PROJECT INITIATIVES

Respondents from the public colleges, that answered the survey, cited involvement in project initiatives such as:

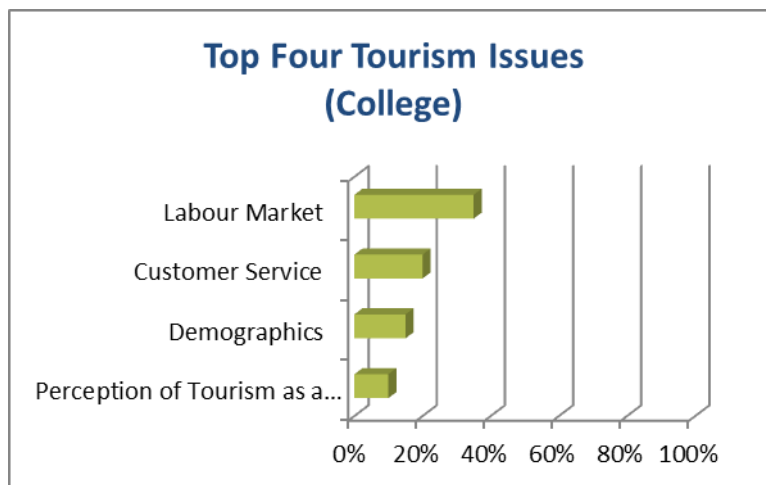
- Heads of Hospitality and Tourism (HOHTO) Food and Beverage Mapping Project: Evaluating Ontario's food and beverage learning outcomes against *emerit* National Occupational Standards;
- Student exchange programs with other institutions;
- Qualifications Framework for the Culinary Industry in Canada;
- Qualifications Framework for the Hospitality/Tourism Industry in Canada;
- National *emerit* Tourism Trainer Standards Updates.

ISSUES AND PRIORITIES

When public colleges were polled on the most important issues and priorities in tourism workforce development over the next 5 years (i.e. demographics, changing technology, labour markets, etc.) the top four responses were:

1. Labour market
2. Customer service
3. Demographics
4. Perception of tourism as a career

From the 19 responses received from this group, 35% pertained to labour market issues, 20% to customer service, 15% to demographics, followed by perception of tourism as a career choice 10%.



Source: OTEC Education Workforce Development Survey, January 10, 2012

Labour market responses dealt with issues such as:

- The inability to provide full time high paying jobs to graduates
 - The needs of employers to be cognizant and respond to the new age group of workers
 - Retention strategies for the current labour market

- Customer service issues surrounded:
 - The ability to maintain the level of service that Canadians are known to offer. This can be eroded due to immigration.
 - Educating the workforce so that they can maintain the level of customer service.
- Demographics
 - Due to the aging baby boomers, an impending shortage in the tourism labour force was foreseen.
- Perception of tourism as a career choice
 - There was low enrollment in college programs because youth were not seeing tourism as a worthy career choice. Tourism is being viewed as retail.
 - The marketing of the tourism industry as a viable career option for students graduating from high schools should be a priority.
- Other issue that emanated from this survey grouping were:
 - The need for investment in hospitality and tourism education programs.
 - The cost of travel and its negative impact on tourism.
 - Technological change and its effects on tourism.

CUSTOMER SERVICE

Public colleges were polled on the availability of a customer service program as part of a provincial program at their institution. The ranked answers were: both Yes and No, and Do not know.

Among the respondents, 40% said yes they had a customer service program which was part of a provincial or national program, and the same number said they did not have such a program whereas, 20% said they did not know.

No one named the national or provincial program of which they are a part. However, 66.6% of the respondents mentioned Service Excellence program which is delivered by the Ontario tourism sector council - OTEC, 16.6% said it was delivered by a professor and 16.6% said not sure who facilitated it.

Education - Industry Partnerships: Public Colleges

FORMAL PARTNERSHIPS/NETWORKS

Partnerships with industry were more abundant within the public college networks than in those of public high schools. The industry advisory committee played a key role within the colleges. They undertook the following:

- Advised the college on availability and suitability of resources and industry support for all work experience components such as co-op, field placement, and summer employment.
- Advised college on changes in the labour market which may affect the employment of graduates.

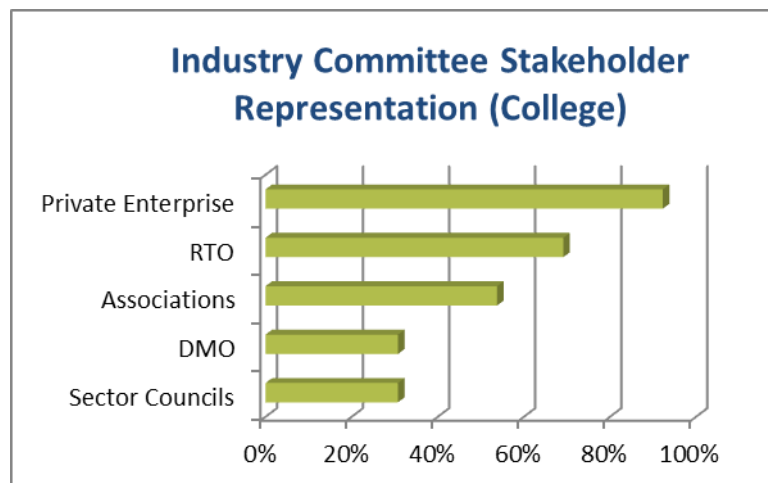
- Identified emerging trends and potential areas for growth relevant to the industries they serve.
- Recommended and assisted the college in developing new programs of study responsive to the needs of specific industries/professions or developments in the community.
- Maintained an active public relations profile for the program and the college within industry, and the community, and ensure there is an ongoing public awareness of current and emerging career opportunities.
- They extended invitations to industry to chat with students.
- Participated in program reviews, provided industry information and ensured that curriculum fits industry needs.

Public college utilization of advisory committees was higher than that of government funded high schools. The ranking was as follows: Yes, No and no one said that they did not know.

Advisory committees were found in greater frequency among college respondents than those from secondary schools. When 15 college respondents were polled on this topic an affirmative retort was present 86.7%, whereas, a negative response was 13.2%.

The same stakeholders were present; however, the frequency in which they were found within the college advisory committee differed. There were 37 responses from 13 respondents for stakeholder involvement in the advisory committee. These were ranked as follows: Private enterprise, Regional Tourism Organizations, Associations and both Sector councils and Destination Marketing Organizations.

Private enterprises had a response rate of 92.3%, Regional Tourism Organizations 69.2%*, Associations 53.8%, Destination Marketing Organizations and Sector Councils 30.8%.



Source: OTEC Education Workforce Development Survey, January 10, 2012

***Note:** Although 69.2% of college respondents reported RTO participation on their Advisory Committees, these rates were not supported by RTO survey results. The conflicting results may be due to misconceptions of what organizations fall into the Regional Tourism Organization category.

PROJECT INITIATIVES

Akin to the public secondary schools, the surveyed public colleges reported special project initiatives to increase the employability skills and potential of employment of the specific target labour groups, however, the frequency of occurrences were different. The ranked results are presented below: mature students and people with essential skills gaps, people with a disability and Aboriginal students and New Canadians.

67.7% of public colleges reported having targeted programs for mature students and people with essential skills gap, followed by people with disability 46.7% and by both Aboriginal students and New Canadians who received 40%.

A number of unique industry partnerships were also in place:

- Externships with hotels such as Disney, Marriott and Fairmont Resorts
- Experiential credit co-op with industry
- Disney Exchange Programs
- Dual credit co-op programs that log experience towards national *emerit* occupational certification

INDUSTRY CHANNELS

Similar to the public high schools surveyed, the public college respondents employed a variety of channels to connect with the industry. Similar access methods are employed. The channels used included:

- Industry advisory groups
- Industry subject matter experts
- College employment centres
- Industry conferences
- Industry associations
- National *emerit* occupational standards and learning outcomes
- TICO standards
- Industry visits
- Employer feedback about students
- Experiential learning placements (Co-op, apprenticeship, job shadow, volunteer placements and others)
- Labour market information (LMI) reports
- Sector council programs

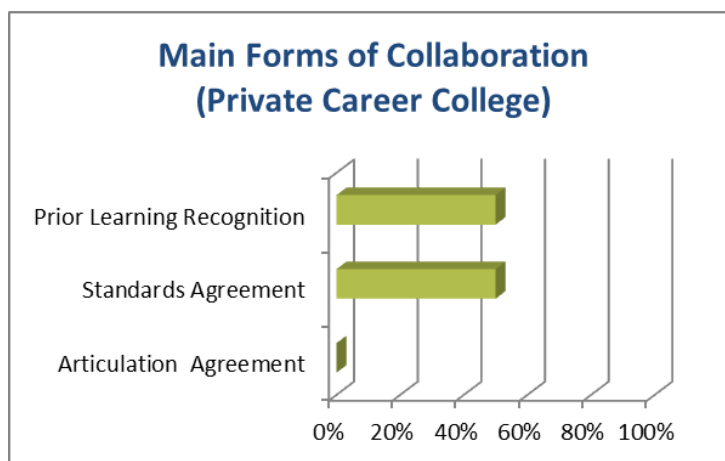
Inter-Education Partnerships: Private Career Colleges

FORMAL PARTNERSHIP NETWORKS

Private career colleges were asked, via the survey, whether or not they collaborated with other educational, pre-employment, or workforce development institutions. The ranked answers were as follows: Yes and No. 67% of the respondents said yes, whereas 33.7% said no.

When questioned on the main forms of collaboration the ranked answers were: Standards Alignment and Prior Learning Recognition.

Both standards alignment and prior learning recognition received a 50% response rate. None of the institutions who responded to the survey, used articulation agreements.



Source: OTEC Education Workforce Development Survey, January 10, 2012

One of the private career colleges noted that the forms of collaboration used are referrals and curriculum development.

ISSUES AND PRIORITIES

When the open-ended question, “What do you think the most important issues and priorities in tourism workforce development are over the next 5 years? (i.e. demographics, changing technology, labour markets, etc.)” was asked to the private career colleges, four (4) responses were given, none with a greater frequency than the other. These were:

- Bringing industry into the area
- Responding to diversity
- Customer service or social skills
- Operators sharing resources

CUSTOMER SERVICE

When private career colleges were polled on the availability of any form of a provincial or national customer service program at their institution, the ranked answers were given: No and Yes.

From amongst the private career respondents, 66.7% said no and 33.3% said yes. The respondent who said yes went on to explain that they had a customer service component in all programs they deliver, and it was developed in-house.

Education Industry Partnerships: Private Career Colleges

FORMAL PARTNERSHIPS / NETWORKS

Like the other education cohorts under consideration in this study, there was the presence of industry advisory committees working with the private career colleges. These committees contributed to:

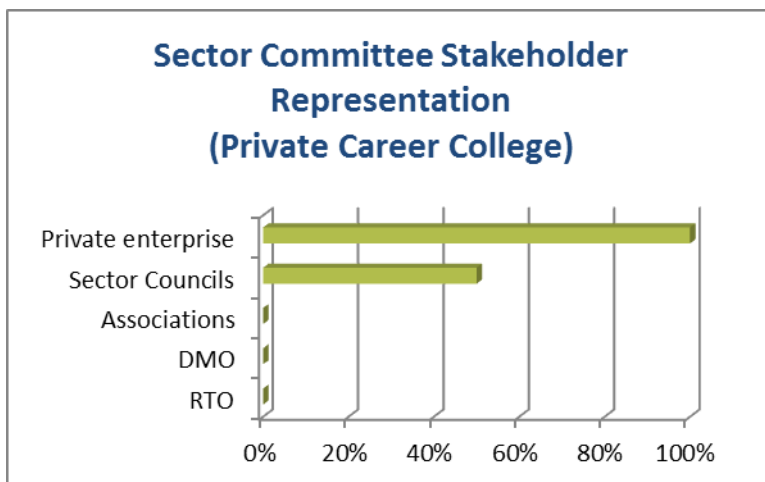
- Training suggestions
- Placement opportunities for students
- Giving both tactical and strategic advice

When the question was asked pertaining to the presence of an advisory committee the ranked answers were: Yes and No.

Amongst the private career colleges who responded to the survey, 66.7% of respondents said yes, whereas 33.3% said no.

The stakeholders who were part of the industry committee differed, to some extent, at the private career college level. There was the absence of 3 out of the 5 organizations that were found at public colleges and high schools. The ranked answers when polled were: Private enterprise and Sector council.

From the cohort private career colleges, 66.7% of the respondents replied to this question. Both respondents had representation from private enterprise on their committees. One of the respondents also had a sector council as part of their industry advisory group. The chart below demonstrates the survey results.



Source: OTEC Education Workforce Development Survey, January 10, 2012

INDUSTRY CHANNELS

The methods used to access industry channels by private career colleges were similar to those used in public high schools and public colleges. The channels employed by this cohort included:

- Industry advisory groups
- Industry subject matter experts
- Industry conferences
- Industry associations
- Industry visits
- Employer feedback about students
- Labour market information (LMI) reports
- Sector council programs
- Learning outcomes
- Meetings of umbrella groups

Pre-employment Agencies

FORMAL PARTNERSHIPS/NETWORKS

Over 94% of survey respondents indicated that they currently collaborate with other educational, pre-employment, or workforce development institutions. Collaboration channels included: information sharing regarding program offerings, committees, referrals, formal and informal partnerships, and curriculum development of workplace essential skills. Over half of the respondents indicated that they collaborate with other institutions monthly (60%), with the remaining respondents collaborating quarterly (20%), semi-annually (13%) and annually (7%).

The National Ready to Work Model is designed to assist people with transitioning into the workforce. Key elements which are administered in projects across Canada include: pre-employment classroom training, Workplace training and Work placement. Within Ontario, the

Ready to Work Model is managed and delivered by OTEC across the province through partnerships with pre-employment programs such as ACCES Employment, KEYS Employment Services, Niagara Employment Help Centre, Unemployed Help Centre of Windsor, the National Capital Region YMCA-YWCA, the Metis Nation of Ontario, HT Hospitality Training, and Correctional Services Canada.

PROJECTS/INITIATIVES

YEP/TWIG Pilot Project – OTEC partnered with the City of Toronto Youth Employment Partnership (YEP) & Toronto Workforce Innovation Group (TWIG) to bring together industry and potential employees allowing both groups to engage and participate in practical training sessions and mini screening interviews. This created greater access to employment opportunities for candidates.

UNITE HERE Hospitality Workers Training Centre - Offers on-site training in many Local 75 hotels across the city, including classes in English as a Second Language, literacy, computer skills and housekeeping skills.

emerit Canadian Workplace Essentials and Workplace Essentials - stemming from Canadian Workplace Essentials - development of Workplace Essentials to use across sectors to assist clients with labour market integration and support workforce development initiatives. Distributed by OTEC throughout employment serving agencies in the province.

INDUSTRY CHANNELS

Unlike the Education sector, only 24% of survey respondents indicated that their agency utilizes an Industry Committee for their programming. Of this 24%, respondents included associations, RTO's, sector councils and private enterprises as key players that are currently involved in their industry committee. Respondents commented that industry stakeholders contribute to workforce development programming through consultation, capacity building, share funding, curriculum development and providing industry perspective and expertise. However, when respondents were asked how their agency develops curriculum, 41% included an industry advisory committee in their response.

59% of respondents indicated that their programs include a work experience component (co-op, externship or community service learning, etc.). Clients are gaining work experience through job trials, on the job training, Municipal OW offices, mentorship, proactive firms and referral through community associations and contacts. 81% of all agencies surveyed provide support to clients as they transition into the labour market through post-hire onboarding, financial support, pre-employment preparation workshops, and job placements.

SECTION 9: SWOT ANALYSIS

Strengths

Policy Climate

1. Workforce development has been identified as a priority by provincial government.
2. Workforce development has been included in the mandate of Ontario's regional tourism organizations.
3. Workforce development has been incorporated into the national tourism strategy.
4. Workforce development has been identified as a priority by, both, TIAO (provincially) and TIAC (nationally).
5. The legislative environment supports mandatory training (AODA, Smart Serve, Safe Food Handling etc.).

Infrastructure

1. Highly developed inventory of tourism and hospitality education programs at all levels (high schools, colleges and universities).
2. Not-for-profit organizations focused on tourism workforce development nationally (CTHRC), provincially (OTEC), and, regionally (RTO's).
3. Access to the CTHRC and OTEC's portfolio of programs and resources (e.g. Labour market research, *emerit* National Occupational Standards and Certifications, *Discover Tourism* career awareness programs, H.R. Toolkits and resources, and, program funding streams).
4. Extensive pre-employment program network (e.g. College workforce development departments, immigrant serving agencies, Employment Ontario service providers, Ontario Works offices, Aboriginal ASETS program delivery branches, etc.).
5. Provincial climate of collaboration within education network (high schools, colleges, etc.); survey results indicate strong willingness to collaborate with industry.
6. Existing network of regional workforce planning boards.

Funding

1. In addition to the Ontario Ministry of Tourism, Culture and Sport, non-tourism-specific government bodies already fund/support workforce development in tourism (e.g. Ministry of Citizenship and Immigration; Ministry of Education; Ministry of Community and Social Services; Ministry of Training Colleges and Universities; Service Canada; FedNor, etc.).
2. Many community agencies and associations facilitate access to resources and funding (e.g. Community Futures Development Corporations; Economic Development; Workforce Planning Boards; OMAFRA; etc.).

Labour Pools

1. New and/or untapped sources of labour exist throughout the province (e.g. high immigration rates, aging population seeking flexible work opportunities, underemployed aboriginal populations in key tourism regions, etc.) or internationally through student exchange and visa programs.

Industry Characteristics

1. Scale and diversity of industry in Ontario, and abundance of corporate head offices provide more opportunities for career advancement and specialization.
2. Favourable work locations, high-profile events, and, interesting experiences provide marketable attributes for recruitment of new labour.
3. H.R. best practices and success stories are evident throughout industry segments.
4. Predominance of small and medium businesses in the sector provides opportunities for entrepreneurship and small business development as a career pathway.

Weaknesses

Labour Market

1. Access to skilled workers within key, and remote, tourism areas.
2. Seasonality of businesses impacts the ability to attract and retain employees; decreases perceived ROI of workplace training.
3. Negative perceptions of tourism as a career.
 - Survey respondents in education sector cite difficulty recruiting youth into tourism programs.
4. Average tourism wages (\$20.26/hr) are lower than average provincial wages (\$30.37/hr).
5. Workforce skill levels are not keeping pace with front-line job requirements.
 - 40% of front-line workers lack the prescribed essential skills levels for their occupation.
6. Tourism businesses are primarily small/medium operators with no H.R. department.
7. Temporary Foreign Workers – businesses and associations cite difficulties navigating the process and securing a labour market opinion.
8. Limited language skills, both English and French, throughout Ontario.

Lack of Strategic Focus / Coordination

1. Workforce development was not defined as a strategic priority until highlighted by the Discovering Ontario Report.
2. Ontario lacks an up-to-date provincial tourism strategy with which to align the workforce development strategy.
3. Lack of provincial and regional workforce development strategies to date have impacted labour market planning.
4. Lack of coordinated career awareness strategies and activities.
5. Perception of tourism as a low paid, low skilled industry, negatively impacts funding opportunities.
6. Misalignment between national and provincial definitions of the sector's categories makes consistent research and reporting difficult.
7. Duplication of efforts in projects and research.
8. Education and pre-employment service providers cite difficulty securing input and cooperation of industry.

Unclear Definitions

1. Lack of common understanding about the scope of workforce development.
2. Inconsistent perceptions of service and occupational standards, training, and definitions of what "service culture" means.

3. The scope of the tourism industry, its workforce, and, occupational opportunities, is not clearly understood.

Training and Resources

1. Availability of training and programming not in proportion to size of industry, market need and geography.
2. No central source for tools and resources.
3. Limitations of industry to attend training due to lack of time, geographic accessibility and availability of programs in remote communities.
4. Limited training options - online training vs. facilitated training.
5. Lack of cohesive catalogue/inventory of pre-employment training options in Ontario.
6. Limited training and resources for owners, operators and managers on attraction and retention strategies.
7. Limited uptake of occupational standards and certifications in Ontario.
8. Insufficient multilingual training programs to support increasingly diverse workforce.

Funding

1. Limited funding resources dedicated specifically to workforce development.
2. Restrictive guidelines of government bodies for training funding (e.g. restrictions on funding occupations with Class D NOC code; bridge training is limited to post-secondary educated management level candidates, etc.).
3. Skills development funders have limited awareness of compensation and advancement potential in the sector.
4. The Ministry of Tourism Culture and Sport has had limited involvement in other provincial ministries' tourism workforce development related funding and activities.

Opportunities

New Strategic Focus

1. Clearly define a workforce development strategy for the province that engages all stakeholders.
2. Align, where possible, with the recommendations of the Discovering Ontario Report, the Federal Tourism Strategy, and, the CTHRC and OTEC strategies, to maximize available resources.
3. Leverage and support the RTO mandate for workforce development.

Coordination

1. The Ministry of Tourism, Culture and Sport can work in partnership with TIAO to leverage the policy climate and promote more active collaboration between national, provincial and inter-ministerial bodies to support tourism workforce development.
2. Coordinate workforce development initiatives to better attract funding sources, and reduce duplication.
3. Collaborate regionally and provincially on program development to create economies of scale.
4. Promote inter-education collaboration, national, provincial, and regional (e.g. Link BC educator's network and database of resources for tourism college programs).
5. Promote the integration of national occupational standards and certifications in Ontario.

6. Promote awareness of workplace literacy and essential skills issues and enhance employers' access to workplace training tools and resources.
7. Promote the alignment of, and, participation in, research initiatives and methodologies to reduce costs and enhance planning tools.
8. Streamline communications on workforce development issues and opportunities to increase industry's knowledge and engagement.
9. Develop agreements and training models that promote continuous professional development and enhance labour mobility (e.g. articulation agreements, dual credentialing and prior learning recognition).

Develop New Sources of Labour

1. Develop and promote pre-employment and educational programming that targets priority labour pools: youth, new Canadians, Aboriginals, mature workers and persons with a disability.
2. Develop local hiring projects with educators and pre-employment stakeholders to support short-term or seasonal recruitment needs.

Promote the Sector as a Career Choice

1. Develop structured career awareness marketing and engagement strategies.
2. Showcase career opportunities within tourism and hospitality to youth, through their first jobs, beginning with secondary and post-secondary students.
3. Enhance recognition of individual and organizational professional development accomplishments.

Adopt New Technologies

1. Embrace new technology to make standards, training and resources more accessible for small/medium sized businesses and across all regions of the province.

Threats

Policy Climate

1. Ongoing government deficits lead to reduced labour market investment and funding.

Competition for Labour

1. Challenge of competing with other labour markets undergoing skills shortages (e.g. competition from health care, retirement residences, financial services, western provinces).
2. Changing demographics (e.g. aging population and declining non-Aboriginal youth demographic).
3. Compensation levels.

Industry Realities / Challenges

1. Tight margins impact human resource and training budgets.
2. Small/medium sized businesses without H.R. departments have limited resources to focus on labour recruitment, retention and succession planning.
3. Regulatory burdens divert businesses' limited resources away from workforce development activities.
4. Increasing skill requirements in front-line positions.

5. Competing industry and business priorities impact time commitments.
6. Businesses' need to focus on short-term revenue priorities can impede long-term H.R./labour planning.
7. English language skills in the workplace.
8. Short term booking trends continue to disrupt labour planning.
9. Weather related business cycles impact planning.
10. Decreasing access to capital impacts industry re-investment and growth.

Long-Term Risks

1. Labour and skills shortages lead to declining visitor satisfaction.
2. Rising labour costs outpace revenue growth.
3. Business decline and closures.
4. Reduced capacity in some regions will reduce destinations' relevance.
5. Without succession planning support, existing tourism product offerings will be sold and repurposed at increasing rates.

SECTION 10: SPECIAL CONSIDERATIONS

In consideration of the SWOT analysis results, it is important to recognize that the foundations exist for the industry to build on. Many provincial, regional and national government bodies (such as FedNor, Ministry of Northern Development and Mines, OMAFRA, MCI, MEDI, MTCU, CIC, Service Canada, HRSDC etc.) are already engaged in supporting workforce development projects and initiatives in various regions of Ontario. Collectively, they provide significant investment into supporting the Ontario tourism sector.

Similarly, tourism stakeholders in various regions and segments of the industry are already developing projects and partnerships that address the priorities identified in this document. For example, Toronto's new UNITE HERE Hospitality Workers' Training Centre was developed alongside the union's professional development strategy to address two priorities. The first was to provide a professional development pathway for members through national occupational certification. The second was to address the fact that many hotel workers could not find affordable housing within manageable commuting distance to the hotels they worked at. Working in collaboration with the Fairmont Royal York, the Meridian King Edward, CK Atlantis and the City of Toronto, the union negotiated access to community housing and a street level café and training centre for its members, all at the same location in downtown Toronto.

With respect to the alignment of national and provincial resources, and, the development of agreements that promote labour mobility, the Heads of Hospitality and Tourism - Ontario Colleges (HOHTO) and the CTHRC are currently engaged in a joint project to map *emerit* National Occupational Standards and Certifications against provincial learning outcomes and Ontario college curricula for Food and Beverage Management. Based on the results of the mapping, the project may lay the foundations for future national-provincial learning recognition or dual credentialing agreements.

As an example of inter-regional coordination, Great Spirit Circle Trail is currently working with a group of similar Aboriginal tourism organizations from across the province to develop a consistent authenticity standard and professional certification model for Aboriginal tourism partners in Ontario. This network is still growing, but is well organized and has characteristics similar to Aboriginal Tourism BC.

These case studies, and other sample initiatives, will be further researched and analyzed to support the development of a strategic plan for the province.

SECTION 11: CONTRIBUTORS

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We would also like to acknowledge the following OTEC team members for their contribution to the development of the Audit Report: Jo-Anne Hecht, Director, Learning & Development; Shurland George, Manager, Education & Skills Development; Debbie Singh, Manager, Project & Partnership Development; Claire Sullivan, Coordinator, Client Development; Cathy Bernas, Amanda Rickward and Samantha Thomas for research and administrative support.

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SECTION 12: REFERENCES

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APPENDIX A

List of Key Terms and Abbreviations

List of Key Terms and Abbreviations

Workforce Development can include programming and resources relating to secondary and post-secondary education, industry training, human resources tools, service and occupational standards, compensation, attraction and retention, employment and bridging programs, labour market research, career awareness activities and other initiatives. Workforce development frameworks represent the systems, agreements, associations, networks, and distribution pathways that ensure these programs and resources are effective in meeting the needs of the sector.

ASETS	Aboriginal Skills and Employment Training Strategy
CATT	Canadian Academy of Travel and Tourism
CIC	Citizenship and Immigration Canada
CODE	Council of Ontario Directors of Education
COP	Committee of College Presidents
CITC	Canadian Institute of Travel Counsellors
CTHRC	Canadian Tourism Human Resource Council
DMO	Destination Marketing Organization
EDCO	Economic Developers Council of Ontario
FEO	Festival and Events Ontario
HOHTO	Heads of Hospitality and Tourism Ontario
HRM	Human Resource Module
HRO	Human Resource Organization
HRSDC	Human Resource and Skills Development Canada
ITHQ	l'Institut de tourisme et d'hôtellerie du Québec
NFSTP	National Food Safety Training Program
NOC	National Occupational Classification Code
OAA	Ontario Accommodation Association
OCAS	Ontario College Application Services
OLC	Ontario Literacy Coalition
OMAFRA	Ontario Ministry of Agriculture, Food and Rural Affairs
ORHMA	Ontario Restaurant Hotel Motel Association
OSRA	Ontario Snow Resorts Association
OTEC	Ontario Tourism Education Corporation
OUAC	Ontario Universities Application Centre
OVTA	Ottawa Valley Tourist Association
OW	Ontario Works
OYAP	Ontario Youth Apprenticeship Program
PRTDF	Premier Ranked Tourist Destination Framework
RTO	Regional tourism Organization
SHSM	Specialist High Skills Major
SRDC	Social Research Demonstration Corporation
TIAO	Tourism Industry Association of Ontario
TICO	Travel Industry Council Ontario
TWIG	Toronto Workforce Innovation Group
WBEY	We've Been Expecting You
WFD	Workforce Development
WHMIS	Workplace Hazardous Materials Information System
YEP	Youth Employment Partnership

APPENDIX B

Secondary School Inventory

Secondary Schools Offering the Specialist High Skills Major (SHSM) Program in Tourism and Hospitality:

School Board	Secondary School
Bluewater District School Board	Peninsula Shores District School
	St. John's College
Brant Haldimand Norfolk Catholic District School Board	Assumption College
	Holy Trinity Catholic High School
Catholic District School Board of Eastern Ontario	St. Michael Catholic High School
	St. Francis Xavier Catholic High School
CECLF du Centre-Est	Centre professionnel et technique Minto
	Collège catholique Franco-Ouest
	Béatrice-Desloges
	ESC Franco-Cité
	ÉSC Garneau
	ÉSC Marie-Rivier
CEP de l'Est de l'Ontario	École des adultes Le Carrefour
	École secondaire publique L'Équinoxe
	Programme systémique (Gisèle-Lalonde, Louis-Riel, l'Alternative, Omer-Deslauriers, De La Salle, Le transit, CEFEQ)
CSC du Centre-Sud French	ÉSC Ste-Famille
CSC Franco-Nord	ÉSC F.J. MacElligott
CS Viamonde	ÉS Confédération
CSDC des Grandes-Rivières	École catholique Jean-Vanier
	ÉSC Thériault
CSDEC du Sud-Ouest Windsor	ESC E.J. Lajeunesse
CSP Grand-Nord	ÉS Hanmer
	ÉS Château Jeunesse
	ÉS de la Rivière-des-Français
District School Board of Niagara	St Catharines Collegiate Institute and Vocational School
	Stamford Collegiate
	Kernahan Park Secondary School
	Welland Centennial Secondary School
	Fort Erie Secondary School
	Eastdale Secondary School
District School Board Ontario North East	Kirkland Lake District Composite School
Dufferin Peel Catholic District School Board	St. Joan of Arc Catholic Secondary School*
	St. Francis Xavier Secondary School
	Ascension of Our Lord Secondary School
	St. Marcellinus Secondary School

	Cardinal Leger Secondary School
Durham Catholic District School Board	Msgr. Paul Dwyer Catholic Secondary School*
	Father Leo J. Austin Catholic Secondary School
Durham District School Board	Oshawa Central Collegiate Institute
	Port Perry High School
	Henry Street High School
	Maxwell Heights Secondary School
	Pine Ridge Secondary School*
	J. Clarke Richardson Collegiate*
	Uxbridge Secondary School*
Grand Erie District School Board	McKinnon Park Secondary School
	Hagersville Secondary School
Greater Essex County District School Board	Century Secondary School
	Leamington District High School
Halton Catholic District School Board	Notre Dame Secondary School
Halton District School Board	E.C. Drury High School
	White Oaks Secondary School
	Georgetown District High School
	Robert Bateman High School
Hamilton-Wentworth Catholic District School Board	Cathedral High School
Hamilton-Wentworth District School Board	Parkview Secondary School
	Orchard Park Secondary School
	Sir John A. Macdonald Secondary School*
	Mountain Secondary School English*
Huron-Superior Catholic District School Board	St. Basil Secondary School
Kawartha Pine Ridge District School Board	Clarington Central Secondary School
	Cobourg District Collegiate East
	East Northumberland Secondary
	Kenner Collegiate and Vocational Institute
	Norwood District High School
	Port Hope High School
Lakefield District High School	
Kenora Catholic District School Board	St. Thomas Aquinas High School
Lambton Kent District School Board	Alexander MacKenzie Secondary*
	John McGregor Secondary School
Limestone District School Board	Loyalist Collegiate & Vocational Inst
Near North District School Board	Parry Sound High School

Niagara Catholic District School Board	Holy Cross Catholic High
	Blessed Trinity Catholic High School
	Notre Dame College School
	Saint Michael Catholic High School
	Denis Morris Catholic High School
	Lakeshore Catholic High School
Nipissing-Parry Sound Catholic District School Board	St. Joseph Scollard Hall Catholic Secondary School
Ottawa-Carleton District School Board	Sir Guy Carleton/Longfields Davidson High School
	Gloucester High School
Peel District School Board	Turner Fenton Secondary School
	Fletcher's Meadow Secondary School
	Graydon Memorial Secondary School
	Sandalwood Heights Secondary School
	West Credit Secondary School
Peterborough Victoria Northumberland and Clarington Catholic District School Board	St. Mary's Secondary School
	St. Peter's Secondary
Provincial Schools	W.Ross McDonald School
Renfrew County Catholic District School Board	Bishop Smith Catholic High School*
	St. Joseph's High School
Renfrew County District School Board	Fellowes High School
	MacKenzie High School
Simcoe County District School Board	Collingwood Collegiate Institute
	Nantyr Secondary School
	Twin Lakes Secondary School
Simcoe Muskoka Catholic District School Board	Fogarty Catholic Secondary School
	St. Dominics Catholic District School Board
Thames Valley District School Board	Arthur Voaden Secondary School
	Lord Dorchester Secondary School
Toronto Catholic District School Board	Blessed Mother Teresa Catholic Secondary School English
	Don Bosco Catholic Secondary School
Toronto District School Board	Central Technical School
	Danforth Collegiate and Technical Institute
	Thistletown Collegiate Institute
	Sir Wilfrid Laurier Collegiate Institute
	Stephen Leacock Collegiate Institute/Sir William Osler High
	Bendale Business & Technical Institute
Trillium Lakelands District School Board	Huntsville High School
	Haliburton Highlands Secondary School

	Gravenhurst High School
Upper Canada District School Board	Gananoque Secondary School
	Smiths Falls District Collegiate Institute
	South Grenville District High School
	Saint Lawrence Intermediate School*
	Russell HS
Upper Grand District School Board	Erin District High School*
	Centre Wellington District High School*
	College Heights Secondary School
	Orangeville District High School
Waterloo Catholic District School Board	Doyle Catholic Secondary School
	St. Benedict Catholic Secondary School
	St. David Catholic Secondary School
	St. Mary's Catholic Secondary School
	Resurrection Catholic Secondary School
	Kitchener-Waterloo Collegiate & V.I.
Windsor-Essex Catholic District School Board	Assumption College Catholic High School
York Region District School Board	Dr. John M. Denison Secondary School*
	Stephen Lewis Secondary School
	Sir William Mullock Secondary School

Canadian Academy of Travel and Tourism Secondary Schools:

School Board	Secondary School
Bluewater District School Board	Peninsula Shores District School
	St. John's College
Brant Haldimand Norfolk Catholic District School Board	Assumption College
District School Board of Niagara	Laura Secord Secondary School
Dufferin Peel Catholic District School Board	St. Joan of Arc Catholic Secondary School
	Ascension of Our Lord Secondary School
Grand Erie District School Board	Hagersville Secondary School
	Simcoe Composite School
Limestone District School Board	Loyalist Collegiate & Vocational Institute
Ottawa-Carleton District School Board	Sir Guy Carleton/Longfields Davidson High School
	Gloucester High School
	Bell HS
Peterborough Victoria Northumberland and Clarington Catholic District School Board	St. Mary's Secondary School
Renfrew County Catholic District School Board	Bishop Smith Catholic High School

Thames Valley District School Board	Arthur Voaden Secondary School
	Lord Dorchester Secondary School
Toronto Catholic District School Board	Pope John Paul II Catholic Secondary School
Toronto District School Board	Danforth Collegiate and Technical Institute
	Bendale Business & Technical Institute
	Lakeshore Collegiate Institute
Trillium Lakelands District School Board	Huntsville High School
	Haliburton Highlands Secondary School
	Gravenhurst High School
Upper Canada District School Board	Gananoque Secondary School
	Smiths Falls District Collegiate Institute
	Saint Lawrence Intermediate School
	Russell HS
Waterloo Catholic District School Board	Kitchener-Waterloo Collegiate & V.I.
York Region District School Board	Dr. John M. Denison Secondary School
	Stephen Lewis Secondary School
	Sir William Mullock Secondary School

APPENDIX C

College Inventory

College Tourism and Hospitality Programs:

Institution	Program Name	Industry	Qualification
Algonquin College	Bachelor of Hospitality & Tourism Management	Accommodation	Undergraduate Degree
	Bartending	Food and Beverage	Certificate
	Cook	Food and Beverage	Diploma
	Cook Apprenticeship	Food and Beverage	Certificate
	Culinary Management	Food and Beverage	Diploma
	Culinary Skills – Chef Training	Food and Beverage	Diploma
	Culinary Skills – Chef Training (Online)	Food and Beverage	Diploma
	Food and Nutrition Management	Food and Beverage	Diploma
	Hospitality Management – Hotel and Restaurant	Accommodation	Diploma
	Hospitality Services	Accommodation	Diploma
	Tourism and Travel	Travel Services	Diploma
	Spa Management	Recreation and Entertainment	Diploma
	Event Management	Recreation and Entertainment	Diploma
	Baking & Pastry Arts	Food and Beverage	Diploma
	Culinary Skills	Food and Beverage	Diploma
	Food Service Worker	Food and Beverage	Diploma
	Aviation Management - General Arts and Science	Transportation	Certificate
	Applied Museum Studies	Recreation and Entertainment	Diploma
	Outdoor Adventure	Recreation and Entertainment	Diploma
	Outdoor Adventure Naturalist	Recreation and Entertainment	Certificate
	Recreation Facility Management	Recreation and Entertainment	Diploma
	Recreation and Leisure Services	Recreation and Entertainment	Diploma
	Sport Business Management	Recreation and Entertainment	Diploma
	Public Relations	Accommodation	Diploma
	Wine Appreciation	Food and Beverage	Certificate
	Conventions and Meetings Management	Recreation and Entertainment	Diploma
Brampton College	Food Service Worker Diploma	Food and Beverage	Diploma
Cambrian College	Advanced Cook Apprentice	Food and Beverage	Certificate
	Baking and Pastry Arts	Food and Beverage	Certificate
	Chef Training	Food and Beverage	Certificate

	Hotel and Restaurant Management	Accommodation	Diploma
	Tourism and Travel	Travel Services	Diploma
Canadore College	Aviation Pilot	Transportation	License
	Helicopter Flight Training	Transportation	Certificate
	Culinary Administration	Food and Beverage	Diploma
	Culinary Management	Food and Beverage	Diploma
	Culinary Skills - Chef	Food and Beverage	Certificate
	Food & Nutrition Management	Food and Beverage	Certificate
	Hotel & Restaurant Administration	Accommodation	Diploma
	Hotel & Restaurant Operations	Accommodation	Certificate
	Cook Apprenticeship	Food and Beverage	Certificate
	Ecotourism	Recreation and Entertainment	Certificate
	Recreation & Leisure Services	Recreation and Entertainment	Diploma
	Recreation & Leisure Services Administration	Recreation and Entertainment	Diploma
	Centennial College	Baking- Commercial Bakeries	Food and Beverage
Culture and Heritage Site Management		Recreation and Entertainment	Certificate
Food Service Worker		Food and Beverage	Certificate
Food and Nutrition Management		Food and Beverage	Diploma
Event Management – Festival and Conference		Recreation and Entertainment	Certificate
Hospitality and Tourism Administration		Accommodation	Diploma
Hospitality Foundations		Accommodation	Certificate
Hospitality Management – Food and Beverage Catering		Food and Beverage	Diploma
Hospitality Management – Hotel and Resort		Accommodation	Diploma
Hospitality Operations - Kitchen Management		Accommodation	Certificate
Hospitality Services		Accommodation	Certificate
Hotel, Resort and Restaurant Management		Accommodation	Certificate
Professional Pilot Training		Transportation	Certificate
Recreation and Leisure Services		Recreation and Entertainment	Diploma
Tourism and Travel		Travel Services	Certificate
Tourism Management – Cultural and Heritage Tourism		Travel Services	Diploma
Event Planning/Meeting Management		Recreation and Entertainment	Certificate
Food Service Worker		Food and Beverage	Certificate
Collège Boréal		Arts culinaires – cuisinier	Food and Beverage
Conestoga College	Aviation - General Arts and Science	Transportation	Diploma

	Bartending	Food and Beverage	Certificate
	Cook I (Apprenticeship)	Food and Beverage	Certificate
	Cook II (Apprenticeship)	Food and Beverage	Certificate
	Culinary Fundamentals	Food and Beverage	Certificate
	Culinary Management (Co-op)	Food and Beverage	Diploma
	Culinary Skills - Chef Training (Co-op)	Food and Beverage	Certificate
	Event Management (Post-Graduate)	Recreation and Entertainment	Certificate
	Food Service Worker	Food and Beverage	Certificate
	Hospitality and Tourism Management (Co-op)	Accommodation	Diploma
	Hospitality Foundations	Accommodation	Certificate
	Hospitality Management - Hotel and Restaurant (Co-op)	Accommodation	Diploma
	Hospitality Operations - Food and Beverage	Food and Beverage	Certificate
	Recreation And Leisure Services	Recreation and Entertainment	Diploma
	Travel Consulting	Travel Services	Diploma
	Youth Recreation Leadership (Post-Graduate)	Recreation and Entertainment	Certificate
Confederation College	Aviation Flight Management	Transportation	Diploma
	Recreation and Leisure Services	Recreation and Entertainment	Diploma
	Cook Apprenticeship	Food and Beverage	Diploma
	Culinary Management	Food and Beverage	Diploma
	Hospitality Management	Accommodation	Diploma
	Tourism and Travel - Adventure and Ecotourism	Travel Services	Diploma
Durham College	Culinary Skills	Food and Beverage	Certificate
	Fitness and Health Promotion	Recreation and Entertainment	Diploma
	Food Processing Safety Techniques	Food and Beverage	Certificate
	Hospitality Management - Hotel, Restaurant & Tourism	Accommodation	Diploma
	Professional Golf Management – Business Administration (Co-op)	Recreation and Entertainment	Diploma
	Sport Business Management (Graduate Certificate)	Recreation and Entertainment	Certificate
	Sports Administration	Recreation and Entertainment	Diploma
	Sport Management	Recreation and Entertainment	Diploma
Fanshawe College	Advanced Bake Patisier	Food and Beverage	Certificate
	Cook II	Food and Beverage	Certificate
	Culinary Management	Food and Beverage	Diploma

	Culinary Management - Apprentice	Food and Beverage	Diploma
	Culinary Skills - Chef Training	Food and Beverage	Certificate
	Concierge Services – Guest Relations Specialists	Accommodation	Certificate
	Food and Nutrition Management	Food and Beverage	Diploma
	Golf and Recreational Club Management	Recreation and Entertainment	Diploma
	Hospitality Management - Food and Beverage	Food and Beverage	Diploma
	Hospitality Management - Hotel	Accommodation	Diploma
	Recreation and Leisure Services	Recreation and Entertainment	Diploma
	Tourism and Travel	Travel Services	Diploma
First Nations Technical Institute	Aviation Pilot - Fixed Wing	Transportation	Diploma
	Indigenous Public Relations	Recreation and Entertainment	Certificate
Fleming College	Chef Training	Food and Beverage	Certificate
	Cook Apprentice	Food and Beverage	Certificate
	Culinary Management	Food and Beverage	Diploma
	Event Management	Recreation and Entertainment	Certificate
	Hospitality Administration - Hotel and Resort	Accommodation	Diploma
	Kitchen Assistant	Food and Beverage	Certificate
	Museum Management and Curatorship	Recreation and Entertainment	Diploma
	Outdoor Adventure Skills	Recreation and Entertainment	Certificate
	Recreation and Leisure Services	Recreation and Entertainment	Diploma
	Recreation and Leisure Services - Advanced Standing	Recreation and Entertainment	Certificate
	Spa Management	Recreation and Entertainment	Certificate
	Sporting Goods Business	Recreation and Entertainment	Diploma
	Tourism and Travel	Travel Services	Diploma
George Brown College	Culinary Management	Food and Beverage	Diploma
	Event and Meeting Management	Recreation and Entertainment	Certificate
	Hospitality Services	Accommodation	Certificate
	Culinary Skills - Chef Training	Food and Beverage	Certificate
	Baking - Pre-employment	Food and Beverage	Certificate
	Baking and Pastry Arts Management	Food and Beverage	Diploma
	Culinary Arts - Italian (Postgraduate)	Food and Beverage	Diploma
	Culinary Management (Integrated Learning)	Food and Beverage	Diploma

	Baker / Patisserie Apprentice	Food and Beverage	Diploma
	Cook Apprentice	Food and Beverage	Certificate
	Hospitality Operations Management	Accommodation	Undergraduate Degree
	Food and Beverage Management	Food and Beverage	Diploma
	Hotel Management	Accommodation	Diploma
	Advanced Wines and Beverage Management	Food and Beverage	Certificate
	Food and Nutrition Management	Food and Beverage	Certificate
	Hospitality Management – Catering	Accommodation	Diploma
	Culinary Management – Nutrition	Food and Beverage	Diploma
	Hospitality, Tourism and Leisure	Accommodation	Diploma
	Special Events Planning	Recreation and Entertainment	Diploma
	Sport and Event Marketing	Recreation and Entertainment	Certificate
	Fashion Business Industry	Recreation and Entertainment	Diploma
	ACET - Assistant Cook (Extended Training)	Food and Beverage	Certificate
	Railway Conductor	Transportation	Certificate
Georgian College	Tourism Management	Travel Services	Diploma
	Bachelor of Business - Golf Management	Recreation and Entertainment	Undergraduate Degree
	Business - Golf Facilities Operation Management	Recreation and Entertainment	Diploma
	Culinary Management	Food and Beverage	Diploma
	Culinary Skills - Chef Training	Food and Beverage	Certificate
	Hospitality Administration - Hotel & Resort	Accommodation	Diploma
	Hospitality Management - Hotel & Resort	Accommodation	Diploma
	Recreation & Leisure Services	Recreation and Entertainment	Diploma
	Snow Resort Fundamentals	Recreation and Entertainment	Certificate
	Snow Resort Operations	Recreation and Entertainment	Diploma
	Tourism and Travel	Travel Services	Diploma
Humber College	Esthetician / Spa Management	Recreation and Entertainment	Certificate
	Applied Business Tourism Management	Travel Services	Undergraduate Degree
	Professional Golf Management	Recreation and Entertainment	Undergraduate Degree
	Tourism Management	Travel Services	Diploma
	Certified Chef de Cuisine	Food and Beverage	Diploma
	Chef Program for Journeyman Cook	Food and Beverage	Certificate

	Cook Apprentice (Basic & Advanced)	Food and Beverage	Certificate
	Culinary Administration (Post-Graduate)	Food and Beverage	Certificate
	Culinary Co-op Diploma Apprenticeship	Food and Beverage	Diploma
	Culinary Management	Food and Beverage	Diploma
	Culinary Skills	Food and Beverage	Certificate
	Food & Nutrition Administration	Food and Beverage	Diploma
	Food & Beverage Service	Food and Beverage	Certificate
	Hospitality & Tourism Operations Management	Accommodation	Certificate
	Hospitality Management-Hotel & Restaurant	Accommodation	Diploma
	Tourism & Hospitality Management-Business Applications	Accommodation	Diploma
	Tourism Management - Travel Industry Services	Travel Services	Diploma
	Recreation & Leisure Services	Recreation and Entertainment	Diploma
	Sport Management	Recreation and Entertainment	Diploma
	Golf Operations Certificate	Recreation and Entertainment	Certificate
	Outdoor Education Certificate	Recreation and Entertainment	Certificate
	Restaurant Management Certificate	Accommodation	Certificate
	Tour Specialist	Travel Services	Certificate
	Travel Agency Operations Certificate	Travel Services	Certificate
	Travel Basics	Travel Services	Certificate
	Hotel Operations Certificate	Accommodation	Certificate
Lambton College	Cook Apprenticeship (Basic)	Food and Beverage	Certificate
	Cook Apprenticeship (Advanced)	Food and Beverage	Certificate
	Culinary Management	Food and Beverage	Diploma
	Food Service Worker	Food and Beverage	Certificate
	Hospitality and Tourism Management	Accommodation	Diploma
	Sports and Recreation Administration	Recreation and Entertainment	Diploma
Loyalist College	Food Safety	Food and Beverage	Diploma
	Culinary Skills - Chef Training	Food and Beverage	Certificate
	Culinary Management	Food and Beverage	Diploma
	Recreation & Leisure Services	Recreation and Entertainment	Diploma
	Esthetics and Spa Management	Recreation and Entertainment	Diploma
Mohawk College	Event Management - Convention and Meeting	Recreation and Entertainment	Certificate

	Recreation and Leisure Services	Recreation and Entertainment	Diploma
	Tourism and Travel	Travel Services	Diploma
Niagara College Canada	Hospitality Management - Hotel and Restaurant (Co-op)	Accommodation	Diploma
	Tourism Management - Business Development (Co-op)	Travel Services	Diploma
	Wine Marketing and Management	Food and Beverage	Certificate
	Wine Making	Food and Beverage	Certificate
	Event Management	Recreation and Entertainment	Certificate
	Sommelier	Food and Beverage	Certification
	Hospitality and Tourism Management	Accommodation	Certificate
	Bachelor of Applied Business (Hospitality Operations Management)	Accommodation	Undergraduate Degree
	Wine Business Management	Food and Beverage	Certificate
	Winery and Viticulture Technician	Food and Beverage	Diploma
	Brewmaster and Brewery Operations Management	Food and Beverage	Diploma
	Cook - Apprenticeship	Food and Beverage	Certificate
	Baker - Apprenticeship	Food and Beverage	Certificate
	Professional Chef Management	Food and Beverage	Certificate
	Culinary Skills-Chef Training	Food and Beverage	Certificate
	Culinary Management (Co-op)	Food and Beverage	Diploma
	Culinary Innovation and Food Technology (Co-op)	Food and Beverage	Diploma
	Recreation and Leisure Services	Recreation and Entertainment	Diploma
	Conventions and Meeting Management	Recreation and Entertainment	Certificate
	Business Administration- Professional Golf Management (Co-op)	Recreation and Entertainment	Diploma
	Health Care Food Service	Food and Beverage	Certificate
	Esthetician	Recreation and Entertainment	Diploma
	Beauty and Spa Techniques	Recreation and Entertainment	Certificate
Sault College	Aviation Technology - Flight	Transportation	License
	Culinary Management	Food and Beverage	Diploma
	Culinary Skills - Chef Training	Food and Beverage	Certificate
	General Arts and Science - Kitchen Assistant	Food and Beverage	Certificate
	Hospitality Management - Hotel and Resort	Accommodation	Diploma
	Hospitality Operations - Food and	Food and Beverage	Certificate

	Beverage		
	Adventure Recreation and Parks Technician	Recreation and Entertainment	Diploma
	Park Operation Skills	Recreation and Entertainment	Certificate
	Esthetician	Recreation and Entertainment	Diploma
Seneca College	Aviation Certificate	Transportation	Certificate
	Recreational Cooking Classes	Food and Beverage	Certificate
	Hospitality Studies	Accommodation	Certificate
	Outdoor Centre Continuing Education Program	Recreation and Entertainment	Certificate
	Sustainable Local Food Certificate	Food and Beverage	Certificate
	Travel and Tourism Certificate	Travel Services	Certificate
Sheridan College	Cosmetic Techniques and Management	Recreation and Entertainment	Diploma
	Esthetician	Recreation and Entertainment	Diploma
	Tourism and Travel	Travel Services	Diploma
St. Clair College	Cook Branch 2	Food and Beverage	Certificate
	Business Administration - Professional Golf Management	Recreation and Entertainment	Diploma
	Culinary Management – Fast Track	Food and Beverage	Diploma
	Culinary Management	Food and Beverage	Diploma
	Esthetician	Recreation and Entertainment	Diploma
	Food Service Management	Food and Beverage	Diploma
	Hospitality Management – Hotel & Restaurant	Accommodation	Diploma
	Tourism and Travel	Travel Services	Diploma
St. Lawrence College	Cook Advanced	Food and Beverage	Certificate
	Culinary Management	Food and Beverage	Diploma
	Culinary Management/Cook Co-op Diploma Apprenticeship	Food and Beverage	Diploma
	Culinary Skills - Chef Training	Food and Beverage	Certificate
	Esthetician	Recreation and Entertainment	Certificate
	Hospitality and Tourism Management / Co-op	Accommodation	Diploma
	Hospitality Management - Hotel & Restaurant / Co-op	Accommodation	Diploma
	Assistant Cook-Basic-Apprenticeship	Food and Beverage	Certificate

APPENDIX D

Private Career College Inventory

Private Career College Tourism and Hospitality Programs:

Institution	Program Name	Industry	Qualification
Academy of Learning Ontario	International Hospitality Management	Accommodation	Diploma
	Conference and Event Planner	Recreation and Entertainment	Diploma
Access Business College	Food & Beverage Management Diploma Program	Food and Beverage	Diploma
	Hospitality Management Diploma Program	Accommodation	Diploma
Algonquin Careers Academy	Travel Counsellor Diploma	Travel Services	Diploma
	Travel Counsellor Online	Travel Services	Diploma
	Fitness & Health Promotion	Recreation and Entertainment	Certificate
Canadian All Care College	Food Handler	Food and Beverage	Certificate
	Food Service Worker	Food and Beverage	Certificate
Canadian Institute of Management & Technology	Post Graduate Diploma in Retail Management	Recreation and Entertainment	Certificate
	Post Graduate Diploma in Business Management	Recreation and Entertainment	Diploma
Centre for Lifelong Learning	Food and Beverage Service Occupations	Food and Beverage	Certificate
Concordia College of Canada	Diploma in Business Management - Hospitality	Accommodation	Diploma
Elliott House Chef School	Professional Chef	Food and Beverage	Diploma
	Culinary Arts	Food and Beverage	Diploma
	Culinary Management	Food and Beverage	Diploma
Elmcrest College	Spa Manager/Director	Recreation and Entertainment	Certificate
Everest College	Hotel and Services Supervisor	Accommodation	Certificate
	Travel and Tourism	Travel Services	Certificate
	Health, Fitness and Nutrition Consultant	Food and Beverage	Certificate
Greystone College	Hospitality Management	Accommodation	Certificate
IBT College	Travel & Tourism	Travel Services	Certificate
International Institute of Travel	Travel Consultant	Travel Services	Certificate
	Travel and Tourism	Travel Services	Certificate
	International Travel and Tourism	Travel Services	Certificate
	Hospitality	Accommodation	Certificate
	Flight Attendant	Travel Services	Certificate

	International Hotel Management	Accommodation	Certificate
	Hospitality Management - Food and Beverage Management	Food and Beverage	Certificate
	Hospitality Management - Hospitality Supervision	Accommodation	Certificate
Kennedy College	Hotel Management	Accommodation	Undergraduate Degree
La Cité collégiale	Arts culinaires	Food and Beverage	Certificate
	Gestion culinaire	Food and Beverage	Diploma
	Gestion hôtelière et de restaurant	Accommodation	Diploma
	Gestion d'événements – festivals et congrès	Recreation and Entertainment	Certificate
	Techniques des services en loisirs	Recreation and Entertainment	Diploma
	Tourisme et voyage	Travel Services	Diploma
Le Cordon Bleu	Grand Diplôme Professionnel	Food and Beverage	Certificate
	The Cuisine Diploma	Food and Beverage	Certificate
	The Grand Diplome	Food and Beverage	Certificate
	The Patisserie Diploma	Food and Beverage	Certificate
	Basic Cuisine	Food and Beverage	Certificate
	Intermediate Cuisine	Food and Beverage	Certificate
	Superior Cuisine	Food and Beverage	Certificate
	Basic Patisserie	Food and Beverage	Certificate
	Intermediate Patisserie	Food and Beverage	Certificate
	Superior Patisserie	Food and Beverage	Certificate
Liaison College	Cook Basic - Level I	Food and Beverage	Certificate
	Cook Advanced - Level II	Food and Beverage	Certificate
	Chef De Cuisine	Food and Beverage	Diploma
	Culinary Management	Food and Beverage	Diploma
	Specialist Chef	Food and Beverage	Diploma

	Hospitality Administration	Food and Beverage	Diploma
	Personal Chef Diploma	Food and Beverage	Diploma
Maple Leaf College	Hospitality Management	Accommodation	Certificate
Metro College	Hospitality Management	Accommodation	Diploma
National Institute	Advanced Aesthetics Diploma	Recreation and Entertainment	Certificate
New Skills College of Health, Business and Technology	Food Handler Certification Training	Food and Beverage	Industry Certification
Niagara on the Lake Culinary School	Culinary Program	Food and Beverage	Diploma
	Hotel and Restaurant Program	Accommodation	Diploma
North American College Of Information Technology	Esthetic Diploma Program	Recreation and Entertainment	Certificate
	Esthetics / New Technologies Diploma	Recreation and Entertainment	Certificate
	Esthetics / Electrolysis Diploma	Recreation and Entertainment	Certificate
Oakville College Careers & Academics Inc.	Aesthetics	Recreation and Entertainment	Certificate
Ottawa Academy	Master Esthetician Diploma Program	Recreation and Entertainment	Diploma
Royal Institute	Esthetics	Recreation and Entertainment	Certificate
Seven Generations Education	Culinary Skills - Chef	Food and Beverage	Certificate
St. Charles Adult Education Centre	Chef Training	Food and Beverage	Certificate
Stafford College	Hospitality Management	Accommodation	Certificate
	Travel & Tourism	Travel Services	Certificate
Stanford International College	Hospitality and Tourism Management	Accommodation	Certificate
Stratford Chefs School	Enriched Apprenticeship for Basic and Advanced Levels of Cooking Diploma	Food and Beverage	Diploma
Travel College Canada	International Travel & Tourism	Travel Services	Certificate
	International Tourism Management	Travel Services	Certificate
Treas Institute	Entertainment Management	Recreation and Entertainment	Certificate
	Event Venue Management	Recreation and Entertainment	Certificate
Tricare Academy	Food Service Worker Diploma	Food and Beverage	Diploma
triOS College	Travel & Tourism	Travel Services	Certificate
Versailles Academy	Professional Esthetician	Recreation and Entertainment	Certificate

Westervelt College	Hotel, Restaurant, and Casino Management	Accommodation	Certificate
	Tourism and Travel	Travel Services	Certificate
Willis College	Esthetics	Recreation and Entertainment	Certificate

APPENDIX E

University Inventory

University Tourism and Hospitality Programs:

Institution	Degree	Program
Brock University	Bachelor of Arts	Tourism and Environment
	Bachelor of Recreation and Leisure Studies	Recreation and Leisure Studies
	Bachelor of Sport Management	Sport Management
University of Guelph	Bachelor of Commerce	Tourism Management
		Hotel and Food Administration
		Commerce - Undeclared Major
	Master of Business Administration	Hospitality and Tourism Management Food and Agribusiness Management
Ryerson University	Bachelor of Commerce	Hospitality and Tourism Management
		Retail Management
University of Waterloo	Bachelor of Arts	Recreation and Leisure Studies
	Bachelor of Arts	Recreation and Sport Business
	Masters of Environmental Studies	Tourism Policy and Planning
	Master of Arts	Tourism Policy and Planning
Lakehead University	Bachelor of Outdoor Recreation/Bachelor of Arts (BOR/BA)	Outdoor Recreation
	Bachelor of Outdoor Recreation	Outdoor Recreation
	Masters of Environmental Studies	Nature-based Recreation and Tourism
Laurentian University	Bachelor of Physical and Health Education	Outdoor Adventure Leadership