

ONTARIO TOURISM WORKFORCE DEVELOPMENT STRATEGY 2012-2017



Tourism Jobs for a Stronger Economy



ACKNOWLEDGEMENTS

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EXECUTIVE SUMMARY

Ontario is Canada's largest and most diverse tourism destination and labour market. The tourism industry represents 9% of total employment in Ontario¹ and 17% of the province's businesses, from small rural outfitters to large corporate hotel chains². As such, the competitiveness, and success, of the tourism industry in Ontario is essential to the economy and labour market as a whole. However, as global labour markets tighten over the next decade, tourism markets around the world are projected to experience significant labour and skills shortages that will impact businesses' ability to attract and retain the labour needed to market a competitive product. As a result, tourism markets across Canada, and internationally, are developing strategies to position themselves for the demographic and labour market challenges on the horizon.

In response to these challenges, the Tourism Industry Association of Ontario (TIAO), with funding support from the Ontario Ministry of Tourism, Culture and Sport, commissioned a project to develop an Ontario Tourism Workforce Development Strategy. In December 2011, the Ontario Tourism Education Corporation (OTEC) was contracted to conduct an audit of provincial workforce development frameworks which culminated in an Audit



Report and SWOT analysis. Subsequently, in January and February 2012, the OTEC project team further developed the issues and priorities identified into a series of strategic priorities and an implementation plan for the sector. Over 500 businesses, associations, RTO's, DMO's, education, and pre-employment stakeholders contributed to the project through surveys, interviews, group consultations and representation on the project's Industry Committee.

The resulting strategy presented in this document has identified four core strategic priority areas upon which the implementation plan is based. The first of these priority areas calls for the industry to **Foster an Environment of Collaboration & Coordination**. It recommends the formation of a Tourism Workforce Council to oversee the tourism workforce strategy implementation in Ontario and ensure the alignment of stakeholders' efforts and resources across the province. The second priority set addresses the need to **Develop a High Performance Workforce** through the provision of a quality and consistent inventory of planning templates, standards, training and resources to local, regional and provincial industry stakeholders.

¹ Preliminary Findings from update to 2010 Human Resource Module of the Tourism Satellite Account, 2012

² Statistics Canada, Canadian Business Partners, December 2010.

The third priority area calls for a provincial **Focus on Workforce Attraction & Retention** and provides a series of initiatives to grow the workforce through community engagement and the development of strategic tactics to improve attraction, retention and career awareness throughout the industry. The fourth priority set addresses the need to **Enhance Information Management & Research** by aligning the industry research, terminology and distribution channels that enable businesses, regions and stakeholder associations to collaborate more effectively in workforce development planning. While these four priority sets can be understood as a distinct set of strategic priorities and initiatives, there are, in fact, synergies between the initiatives which will enable the industry to implement the plan collaboratively and efficiently through five key deliverables.

These deliverables include: Creating a Tourism Workforce Council; Identifying an Implementation Organization; Creating a Workforce Planning Framework; Developing a Career Awareness Strategy; and Developing a Workforce Development Online Portal. The Implementation Plan included in the final section of this document provides a 2012-17 action plan for addressing the Strategic Priorities and accomplishing the five deliverables through a manageable set of tactics completed over a five year schedule.

4 STRATEGIC PRIORITIES

1. Foster an Environment of Collaboration & Coordination
2. Develop a High Performance Workforce
3. Focus on Workforce Attraction & Retention
4. Enhance Information Management & Research

5 KEY DELIVERABLES

1. Creating a Tourism Workforce Council
2. Identifying an Implementation Organization
3. Creating a Workforce Planning Framework
4. Developing a Career Awareness Strategy
5. Developing a Workforce Development Online Portal



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 employment³. Within Ontario, tourism accounts for 9.0% of total employment, providing over 608,000 jobs⁴. 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 Ontario 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.”⁵

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.⁶

As well, it is important to note that workforce development has been highlighted as a national tourism priority in Canada's Federal Tourism Strategy.⁷ 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/

³ Statistics Canada. Labour Force Survey, 2006.

⁴ Preliminary Findings from update to 2010 Human Resource Module of the Tourism Satellite Account, 2012- Figure includes full-time, part-time and self-employed workers in transportation, accommodation, food and beverage services, recreation and entertainment, and transportation sectors.

⁵ Discovering Ontario Report, 2009, p. 34.

⁶ Discovering Ontario Report, 2009, p. 43.

⁷ Canada's Federal Tourism Strategy: Welcoming the World, 2011.

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”.⁸

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.⁹

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 several 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.^{10,11,12}

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.¹³ 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, the Ontario Tourism Workforce Development Strategy presented in this document has been created in partnership with industry and stakeholders from across the province to guide Ontario tourism workforce development planning in the years to come. This strategy will provide focus to tourism leaders, government, labour, education, industry organizations including Regional Tourism Organizations (RTO's), Destination Marketing/Management Organizations (DMO's), Sector Associations, and business operators as they strive to address Ontario's workforce challenges. With a provincial scope, the strategic priorities, initiatives and implementation plan presented here will provide a framework to assist regional and sectoral stakeholders in defining and aligning their own market-specific workforce plans and strategies for the future.

⁸ Building a National Tourism Strategy, 2011, p. 14.

⁹ Top 10 Barriers to Competitiveness, 2012.

¹⁰ New Zealand Tourism & Hospitality Workforce Strategy, 2006.

¹¹ Australia's Tourism and Hospitality Workforce Development Strategy, 2009.

¹² Tourism Workforce Development Strategic Plan 2007-2015, 2007.

¹³ Ontario Tourism Industry Structure Assessment Research Study, 2009.

PROJECT METHODOLOGY

To meet the objectives of this report, OTEC utilized a methodology that assessed the existing supply of workforce skills, and skills development frameworks, against the industry market for labour and workforce development activities. This process has been summarized below. For a complete review of the Project Methodology, please refer to the Ontario Tourism Workforce Development Strategy Project Audit Report.

Understanding Our Workforce Skills Issues

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



Algonquin College Culinary Students

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 were 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 2,707 industry businesses, 9 associations, 13 RTO's, 45 DMO's, 500 educators, and 200 pre-employment services representatives. Direct follow-ups were conducted in order to secure a total response rate of approximately 18%.

Assessing Our Issues & Opportunities

Based on the data collected from December 2011 to January 2012, the project team conducted an Ontario tourism workforce development audit to provide the foundations for the creation of the strategy. Utilizing feedback from stakeholders throughout the sector, an audit report was developed which provides an inventory of academic, community and industry workforce development activities and outcomes, as well as an interim evaluation of workplace skills gaps in Ontario. The report also presents an analysis of industry perspectives on the issues affecting attraction, retention and workforce development in the context of the current and projected labour market trends. In essence, the supply of workforce development programs, activities and stakeholders were assessed against workplace skills data, and, the market for labour and workforce development programming.



Guide, Jeff Gustafson, www.gussyoutdoors.com

This process contributed to the identification of the strengths, weaknesses, opportunities and threats impacting competitiveness in Ontario's tourism workforce. In January 2012, the Industry Committee was engaged to further develop and validate the Tourism Workforce Development Audit and SWOT analysis (See Appendix B for full SWOT Analysis).

During phase two of the project, undertaken in January and February 2012, the project team further developed the issues and priorities identified with the Industry Committee into a series of strategic priorities for the sector. Strategic initiatives from across Ontario, Canada and international tourism destinations were evaluated and coded for their relevancy to the issues affecting Ontario's tourism workforce. The concepts identified were then adapted and supplemented through industry consultations to define opportunities that respond to Ontario's unique assets and stakeholder networks. This process resulted in the development of a new set of Strategic Priorities and Initiatives for Ontario. RTO and Sector Association stakeholders from across Ontario were consulted on these priorities through a series of meetings conducted in February 2012 to provide feedback and further develop the opportunities they represent. These strategic priorities provide the foundations of the Ontario Tourism Workforce Development Strategy and Implementation Plan presented in this report, which were validated by the Industry Committee in March 2012.

SITUATIONAL ANALYSIS – ONTARIO'S TOURISM INDUSTRY

THE INDUSTRY AT A GLANCE

As a geographically and structurally diverse industry, the scale and importance of tourism in Ontario is often underestimated. Ontario boasts cosmopolitan urban cities as well as rugged, natural environments, each with unique assets and attractions to offer the domestic and international visitor. Tourism businesses range from large branded hotels in downtown Toronto to family owned, fly-in outfitter's lodges in Northern Ontario.

There are around 150,000 tourism businesses in Ontario, making up 17% of all provincial businesses¹⁴.



¹⁴ Statistics Canada, Canadian Business Partners, December 2010.

Almost 90% of these are small and medium-sized enterprises. Tourism is the main economic generator in many communities throughout Ontario providing over \$21B in total receipts¹⁵. The industry generates over \$6B in foreign currency earnings, a total of \$19B in value-added contribution to the economy, and, \$12B in labour income¹⁵. As a whole, Ontario's tourism businesses contribute almost \$10B in tax revenues to the three levels of government. With a decline in some industries such as manufacturing and resource-based sectors, many municipalities look to tourism as a means to diversify their economies in the coming years¹⁵.

Over the past decade, the Ontario tourism industry has been challenged by several global impacts. The 9/11 terrorist attacks, SARS outbreak, H1N1 and, most recently, the global economic downturn, have all contributed to significant decreases in global travel. As well, the strengthening of the Canadian dollar relative to the US dollar has impacted international inbound travel, particularly from the United States. The CDN\$/US\$ exchange rate that was around 0.63 at the turn of the century, now fluctuates around par. This shift in the value of the Canadian dollar has been a significant contributor to the drop in travel from the United States from a high of 30 million visitors in 1999 to the current level around 11 million.

LABOUR MARKET INDICATORS

Labour Shortage Projections

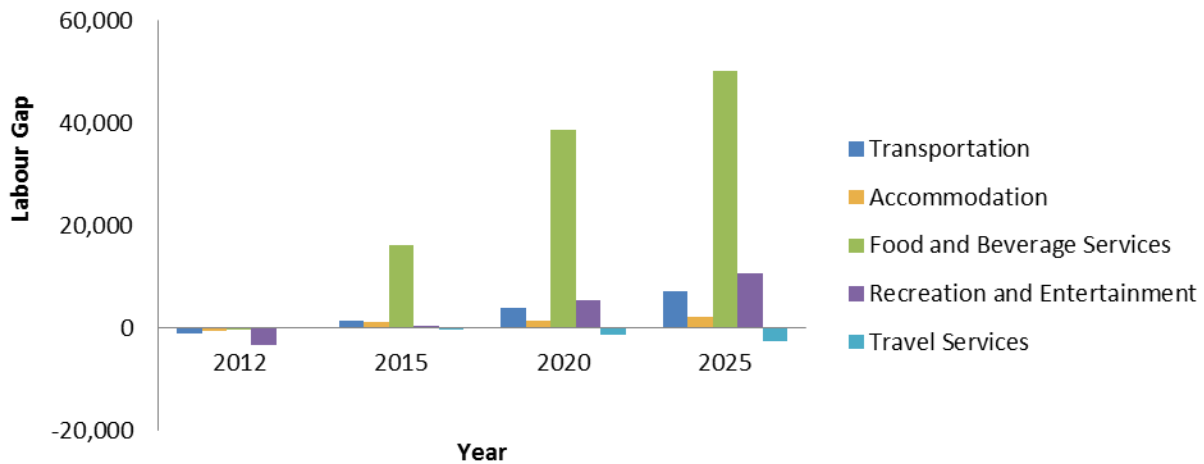
Due to our aging population and progressively lower birth rates, Ontario will start to experience a severe skills shortage in the near future. The Tourism and Hospitality industry is no exception. The economic recession of 2008-09 eased labour shortages throughout the country, providing a temporary reprieve from the tight labour markets seen in the years leading up to the downturn. 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 jobs¹⁶. 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. The labour shortages are forecasted to be the most significant in the province's food and beverage services sector, as shortages could rise to more than 50,200 full-year jobs by 2025¹⁶. Similarly, the accommodation sector is projected to experience a shortage of 2,080 jobs by 2025; transportation a shortage of 7,010 jobs; recreation and entertainment a shortage of 10,660 jobs¹⁶. Conversely, travel services is expected to have a surplus of nearly 2,500 jobs.



¹⁵ Ministry of Tourism, Culture and Sport, Tourism Research Unit Quick Facts, 2009.

¹⁶ Preliminary Data from 2012 Update to the Future of Canada's Tourism Sector Report, CTHRC and Conference Board of Canada, 2012.

Tourism Labour Gap Projections



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

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.¹⁷ 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."¹⁸

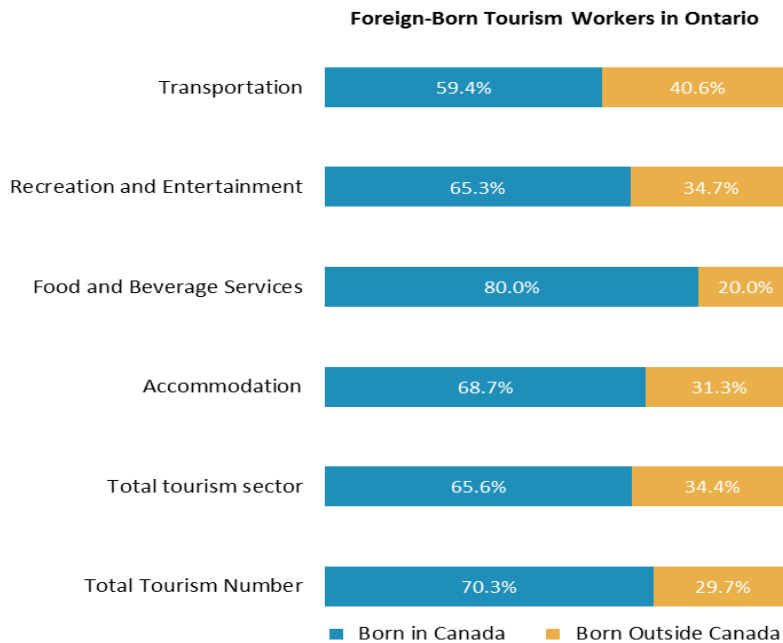


"Within this decade, immigration will account for all net growth in the working-age population. By attracting skilled workers from abroad, Ontario can better address potential labour-market shortages."¹⁹

¹⁷ Newcomers to Canada Employed in Tourism, 2010.

¹⁸ Foreign Credential Recognition and Human Resources and Social Development Canada, Canadian Issues, Spring, 17-20, 2007.

¹⁹ Ontario Ministry of Finance, 2012, Commission on the Reform of Ontario's Public Services.



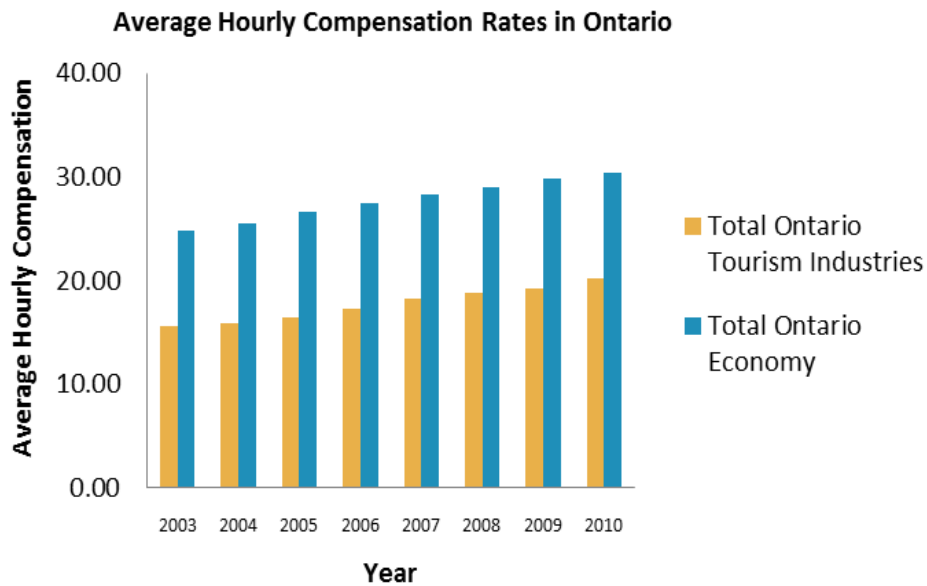
Source: Demographic Profile of Tourism Sector Employees - Ontario (CTHRC, 2010).

The Compensation Gap

Tourism industries in Ontario generated a total of 608,000 full-year jobs in 2010.²⁰ 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 2010.²⁰ According to preliminary data from an update to the 2010 Human Resource Module of the Tourism Satellite Account, 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. However, average tourism compensation rates still fall below those of the total economy by 30%. Compared with tourism compensation levels in other provinces, Ontario is relatively competitive.²¹

²⁰ Preliminary Findings from update to 2010 Human Resource Module of the Tourism Satellite Account, 2012.

²¹ 2010 Canadian Tourism Sector Compensation Study, 2011- Provides a full listing of compensation levels by province and occupation.



Source: Preliminary Data for Update to 2010 Human Resource Module of the Tourism Satellite Account (CTHRC, Ontario Ministry of Tourism, Culture & Sports, and Statistics Canada, 2012).

A SHIFT IN WORKFORCE SKILL LEVELS

In Ontario, the labour market is shifting toward an increased demand for 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.²² If continued, this workplace skills gap could have a detrimental impact on Ontario's future workforce productivity. It is estimated that over the next five years, 65% of all new and replacement jobs will require some form of higher education.²³

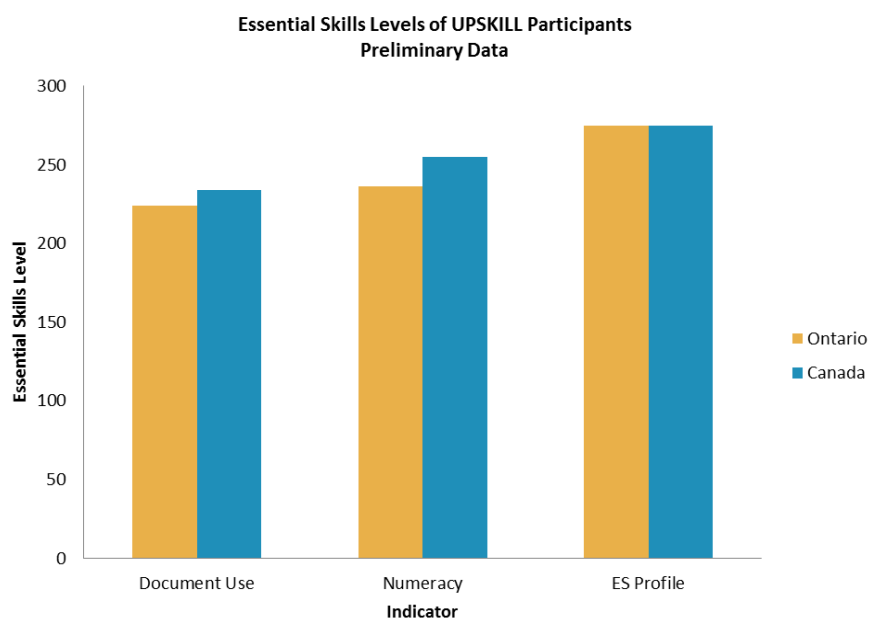


O TEC has been working on a national essential skills training and demonstration project with the Social Research and Demonstration Corporation (SRDC) called UpSkill: Essentials to Excel, to shed further light on these issues. In 2011-12, O TEC's research team conducted essential skills assessments with 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.²⁴

²² International Adult Literacy and Skills Survey, 2003.

²³ People Without Jobs, Jobs Without People, 2010.

²⁴ Social Research and Demonstration Corporation, 2011.



Source: “UPSKILL: Essentials to Excel: Early Analysis”. Unpublished Technical Paper. (SRDC, 2011).

EDUCATION AND WORKFORCE DEVELOPMENT ACTIVITIES

Secondary School Programs:

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.

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.

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.



The ELF program designed by Santa's Village (Employment Learning Foundation) was established to offer training to help teenagers prepare for their first job.

"Our thought was this. If we could use the training course to help us recruit our employees, they would come to us with general training and we could get right to the "on the job" training. We would have our choice of the best of the best. To date we have trained about 400 students and it's been a wonderful recruiting tool for us." April Keyes, Santa's Village

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 groups.

Pre-Employment Programs:

Pre-employment preparation programs across Ontario 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, as well as more intensive, multi-week training programs targeting specific occupational streams and target labour pools. 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%.

INDUSTRY TRENDS AND PERCEPTIONS



Perceptions of the Labour Market

In the January 2012, OTEC Tourism Workforce Development Survey, tourism and hospitality businesses identified the top 3 issues currently facing their business as: #1 The Economy (34%); #2 Labour Issues (28%); and, #3 Lack of Customers (25%). The RTO's, DMO's and Sector Associations also identified the economy, labour, lack of visitors, as well as lack of funding, as key issues facing the industry.

Barriers

Many barriers exist that prevent the development of a readily available and adequately trained workforce. Tourism and hospitality businesses listed the barriers/challenges to building a skilled workforce in their organization as: #1 Labour Shortage (41%); #2 Seasonality of the Industry (18%); #3 Low Wages (14%); #4 Training Issues (13%); and, #5 Lack of Funding (13%).

The RTO's, DMO's and Sector Associations had a different perspective than businesses and reported the following barriers to building a skilled workforce: #1 Cost of Training and

Lack of Available Training Resources (44%); #2 Negative Perceptions of Careers in Tourism (22%); #2 Seasonality (22%); and, #2 Lack of Labour Market Knowledge and Focus (22%).

Industry Priorities

Tourism and hospitality businesses listed their top workforce development priorities as: #1 Training (57%); #2 Recruitment (45%); #3 Creation of Service Standards (23%); and, #4 Compensation (20%).

RTO's, DMO's and Sector Associations also identified training as the top workforce development priority. Other key priorities included recruitment, retention, and creation of service standards. A few RTO's identified regional needs assessments, regional strategies and career awareness as priorities in their region as well.

Premier Ranked Tourist Destination Framework

The Premier Ranked Tourist Destination Framework (PRTDF) reports also clearly identified consistent service standards and training throughout destinations as a priority need. Eighty-two percent of destinations identified customer service training as the top workforce development priority.

Industry Training and Workforce Development Activities

The January 2012 OTEC Workforce Development Survey clearly identified that training is the most prominent workforce development activity currently being completed by Ontario's tourism and hospitality businesses, followed by participation in career awareness events, compensation studies/reviews and regional labour market supply/demand studies. Seventy-one percent of industry respondents have budgets allocated towards workforce development. The RTO's are newly formed and most do not have a workforce development strategy in place at this time. In 2011, for those RTO's, DMO's and Sector Associations who participated in workforce development initiatives, activities included training, compensation studies and curriculum development.

Network and Association Training and Workforce Development Activities

The Ontario tourism and hospitality industry has relationships with workforce development and education networks. Although high schools, universities and economic development organizations were mentioned from time to time by survey respondents, the strongest relationships are with the college network.



SWOT ANALYSIS

Summary

The key issues and opportunities from the SWOT Analysis have been summarized below. For the complete SWOT Analysis, see Appendix B of this document or the Ontario Tourism Workforce Development Strategy Project Audit Report.

Strengths

Over the past three years, tourism workforce development has been identified as a priority at the national, provincial and regional levels. There has never been a better policy climate for the development of strategies that align the extensive research, workforce development infrastructure and funding available in Ontario, and federally, toward the labour needs and opportunities of the tourism sector. New and/or untapped sources of labour exist throughout the province (e.g. high immigration rates, an aging population seeking flexible work opportunities, underemployed aboriginal populations in key tourism regions, etc.) and the industry provides a myriad of unique, exciting, even flexible, employment and career opportunities that simply need to be communicated to the labour market.



Aboriginal Experiences, Arts and Culture - Turtle Island Tourism Company

Weaknesses

Access to labour throughout the year, and, in key and remote tourism markets, has posed a challenge to Ontario's tourism industry for many years. The seasonality of the business cycle has long made it difficult to implement strong attraction and retention practices and precluded long-term professional development planning with employees. In turn, these same factors have contributed to a perception of tourism as a short-term employment opportunity and kept many candidates from exploring the full range of career pathways available to them. Over the past number of years the Ontario economy has transitioned and tourism businesses have come to rely more heavily on labour from declining sectors and overseas. As a result, average workplace skill levels, and productivity, in Ontario has declined, and now trails the Canadian labour market as a whole.

Addressing these issues requires a concerted, collaborative strategy that includes industry, education, government and community stakeholders but, to date, there has been little strategic coordination toward workforce development in Ontario. Workforce development was only recently raised as a priority in the "Discovering Ontario" report and the province still lacks an up-to-date tourism strategy with which to align research and workforce development planning.

As a result, the industry lacks a consistent understanding of the scope of the issue, and, the workforce development tools, resources and stakeholders that exist to address it. Training and resources that do exist are largely unknown, leading to widespread inefficiencies as stakeholders struggle to address the same challenges in isolation and with the limited funding available.

Opportunities

With the current climate of collaboration and a consensus developing on the importance of workforce development in the years to come, the opportunity exists to align all industry stakeholders toward a new strategic focus. As indicated in the recommendations of the Discovering Ontario Report, the Federal Tourism Strategy and the strategies of CTHRC and OTEC, the province is strategically poised to leverage the



combined resources toward a consistent set of workforce development goals. The opportunity exists for TIAO to work in partnership with the Ontario Ministry of Tourism, Culture and Sport to direct these efforts and advocate for the sector in Ontario. In concert, these stakeholders are well positioned to support the efforts of Ontario's RTO's in conducting efficient and effective regional workforce research, planning and development across the province.

Working as a coordinated network of stakeholders, industry, government, education and community partners can promote the sector as a career choice with a single voice to clearly communicate tourism's unique employee value proposition. Working with the RTO's, stakeholders and businesses, we can work to develop new sources of labour and local hiring models that prepare candidates for opportunities in real time. Finally, with the networked technologies now available, the opportunity exists to support key and remote tourism destinations and businesses with consistent, quality training, standards and resources across the province.

Threats

Just as the labour market and policy climate presents opportunities, they also pose numerous threats to the future competitiveness of tourism in Ontario. Other provinces, and tourism destinations across the world, are projecting similar labour and skills shortages to those in Ontario and have been investing in their workforce development infrastructure for years. Furthermore, it is not only competing tourism markets with which Ontario must compete for labour, but other service industries like healthcare and long-term care that are systematically recruiting tourism and hospitality labour out of the industry.

Faced with the realities of seasonal business cycles, short-term booking trends, comparatively low wage rates, tight margins and regulatory burdens, it will be difficult for Ontario's tourism businesses to compete on a level playing field for labour. Worse still, is the fact that language and workplace skill levels are lagging in Ontario, while businesses are trying to integrate new technologies to remain competitive and productive. The threat is as much a skills shortage as it is a labour shortage.

Despite the challenges, the risks associated with inaction are severe. As a service industry, tourism relies on the skills and motivation of its people. As labour and skills shortages intensify, declining visitor satisfaction, which is quickly broadcasted through modern social media channels, will begin to erode Ontario's tourism market share. There is also a risk that rising labour costs in a tight labour market will eventually outpace revenue growth, leading to business decline and closures. Many businesses rely on the reputations of their regions as destinations and, with reduced capacity as businesses are repurposed for retirement and other services, Ontario will gradually lose relevance as a tourism market. With tourism contributing almost \$20B to Ontario's economy in value-added revenue and 9.0% of provincial employment, these outcomes must be avoided.



STRATEGIC PRIORITIES AND INITIATIVES

1. Strategic Priority: Foster an Environment of Collaboration & Coordination

GOAL: Workforce Development is a priority for Ontario's Tourism sector and the industry works together to implement the Ontario Tourism Workforce Development Strategy.

Strategic Initiatives

1.1 Create a Tourism Workforce Council

- a) Establish an industry-led Tourism Workforce Council (see Appendix A) accountable to TIAO and MTCS to direct the implementation of the tourism workforce development strategy and initiatives, and to:
 - Define workforce development definitions and metrics for the province;
 - Promote partnerships and opportunities among stakeholders;
 - Identify funding opportunities;
 - Monitor outcomes and impacts of strategy.
- b) Identify a lead Strategy Implementation Organization to:
 - Centralize the coordination of the implementation plan and the coordination of the delivery channels for the tourism workforce development strategy;
 - Align provincial and regional strategies with national strategies and leverage resources to deliver on the recommendations of the Tourism Workforce Council.
- c) Support and ensure the sustainability of the lead Strategy Implementation Organization to facilitate regional and provincial communications and access to tools, resources and programming.

1.2 Increase Provincial Leadership

- a) Support TIAO's efforts to work with the Ministry of Tourism, Culture and Sport to:
 - Advocate for an "all of government approach" to tourism workforce development policy and funding decisions;
 - Promote more active collaboration between national, provincial, and inter-ministerial bodies to support workforce development through more effective policy and program development;
 - Establish a dedicated source of funding for tourism workforce development initiatives identified in the strategy;
 - Propose regulatory changes that could increase productivity and flexibility in the industry.
- b) Recognize the leadership role that OTEC plays in implementing provincial and national workforce development initiatives in Ontario.
- c) Reinforce efforts of industry organizations to initiate workforce development activities within regions and sectors.

1.3 Provide a Framework for Workforce Development

- a) Develop a strategic planning template to assist RTO's in creating regional workforce development plans that leverage all available resources, engage stakeholders and capture economies of scale in program development.
- b) Develop a similar strategic planning template, as noted above, to assist Sector Associations and DMO's in creating their workforce development plans where applicable.
- c) Link RTO's with OTEC, Sector Associations, Regional Planning Boards, Chambers of Commerce, Business Enterprise Centres, and Employment Ontario Service Providers.
- d) Ensure funding for workforce development (MTCS, MTCU, MEDI, Service Canada, HRSDC, MCSS, MCI, FedNor, FedDev, etc.) is leveraged to maximum efficiency.

1.4 Develop a Coordinated Education Network

- a) Develop a Provincial MOU to define the partnership through which Ontario universities, colleges and OTEC can align their activities to deliver regional workforce development.
- b) Formally link the education network with industry to facilitate tourism and human resource planning.
- c) Work with CTHRC and other provincial organizations to engage education networks to expand and create a shared provincial and national educators' database of research, resources and standards to assist Ontario's educational institutions in developing, validating and maintaining effective programming.

1.5 Build Awareness of Workforce Development Networks, Tools and Resources

- a) Coordinate workforce development initiatives to reduce duplication, create economies of scale and demonstrate return on workforce development investments.
- b) Create a provincial and regional communication strategy to share information and resources and build awareness of workforce development research, resources and programming streams.

2. Strategic Priority: Develop a High Performance Workforce

GOAL: Ontario's tourism workforce is recognized for progressive human resource practices, service, quality and productivity.

Strategic Initiatives

2.1 Establish a Task Force to Develop Provincial Service Standards

- a) Through the Tourism Workforce Council, create a working group to define Service Standards, in conjunction with industry, RTO's, Sector Associations, DMO's, and government stakeholders. These Service Standards will be used as a benchmark for industry organizations and tourism businesses to improve the quality of customer service delivery.

2.2 Improve Access to Training and Development

- a) Increase the availability of training resources and support, including new technologies, to meet the needs of industry in all markets and geographic locations.
- b) Provide more management and supervisory skills training to assist owners and managers with employee attraction, retention, coaching and leadership skills.
- c) Provide more training and tools for entrepreneurs to enter the industry.
- d) Provide more training and tools for small/medium sized business operators, particularly in remote regions.
- e) Increase skills development programming for front-line workers to meet changing requirements of workplaces.
- f) Develop agreements and training models that promote continuous professional development and to enhance labour mobility (i.e. articulation agreements, dual credentialing and prior learning recognition) in order to identify clear professional development pathways.
- g) Build awareness with employers of the benefits and ROI of supporting skills development.
- h) Support industry with language/multicultural training for increasingly diverse workforces and for key and emerging markets (e.g. China, India, Latin America).

2.3 Establish Workforce Development Metrics

- a) Develop metrics to track industry workforce skills development and the penetration of occupational standards and certifications within Ontario.
- b) Integrate literacy and essential skills metrics into workforce planning frameworks.

2.4 Establish Workplace Productivity Metrics

- a) Promote high performance work environments through progressive human resource practices and performance management systems.
- b) Investigate the integration of formal Employer of Choice measurement tools to guide human resource development practices particularly in SME's.

3. Strategic Priority: Focus on Workforce Attraction & Retention

GOAL: Ontario's tourism industry is successful in attracting and retaining talent to achieve its service and competitiveness goals.

Strategic Initiatives

3.1 Promote Tourism as a Career

- a) Develop and fund structured career awareness/attraction marketing and engagement strategies for students in elementary, secondary, post-secondary, and, non-traditional educational streams.
- b) Identify target labour groups and build awareness in pre-employment stakeholder networks.
- c) Support the Strategy Implementation Organization in coordinating Sector Associations, DMO's, RTO's and industry's engagement in regional career awareness activities.
- d) Promote small business development and entrepreneurship as a career choice.

3.2 Develop Attraction Strategies to Grow Workforce

- a) Develop pre-employment and educational programming to engage key labour pools (Newcomers, Youth, Aboriginals, Mature Workers, and People with Disabilities).
- b) Identify new and/or untapped sources of labour throughout the province (e.g. demographic trends resulting in high immigration rates, aging populations seeking flexible work opportunities, underemployed Aboriginal populations in key tourism regions, youth, persons with disabilities, etc.), or internationally, through student exchange and visa programs.
- c) Engage Aboriginal communities to initiate tourism labour market development programming directed for youth engagement.
- d) Develop programs to mitigate seasonal labour shortages through better access and labour mobility.
- e) Advocate to ensure immigration policies and programs are responsive to industry needs.

- f) Engage students at the elementary, secondary and post-secondary level and leverage provincial and national student scholarship programs to support post-secondary studies in the sector (e.g. Ontario Hostelry Institute).
- g) Collaborate with Sector Associations, DMO's and RTO's in developing recruitment strategies to support industry in offsetting strong competition for labour from other sectors and provinces.
- h) Develop local hiring projects with educators and pre-employment stakeholders to strategically focus on labour shortage issues and support industry with short-term or seasonal recruitment needs.
- i) Support small business and entrepreneurship start-up training programs.

3.3 Develop Strategies to Retain Talent

- a) Assist tourism operators with succession and human resource planning.
- b) Develop plans with regions/RTO's to assist managers and business owners with employee engagement and retention strategies to ensure businesses are successful, become employers of choice, and retain talent.
- c) Enhance attractiveness of working in the sector to attract target labour groups.
- d) Encourage inclusive workplaces that respect human rights and welcome cultural, generational and religious diversity.

3.4 Build Employer and Employee Recognition Programs

- a) Increase recognition of companies with successful worker retention strategies (e.g. Employer of Choice, Training, H.R. programs, integration of national/provincial standards).
- b) Build on successful provincial or regional skills, training and H.R. oriented recognition programs (e.g. Stars of the City, Culinary Skills Competition, etc.)
- c) Build employer recognition about benefits and ROI of strong H.R. practices including recognition and rewards programs.

3.5 Develop Competitiveness Strategy for Future Workforce

- a) Develop and communicate the provincial tourism employee value proposition to demonstrate the compensation and lifestyle attributes of a career in tourism.
- b) Engage industry with government agencies such as MEDI, CIC and Service Canada to plan a coordinated approach to international recruitment (e.g. Temporary Foreign Workers and Provincial Nominee Program).
- c) Improve access to Francophone and Aboriginal training to provide skilled workers in Northern Ontario.
- d) Develop strategies to attract and retain skilled workers from other sectors and jurisdictions.
- e) Utilize Sector Associations and RTO's to share compensation analysis best practices with SME's in order to support local and international labour market competitiveness.
- f) Prioritize Literacy and Essentials Skills programming to ensure front-line workers have the necessary skills for current and future workplaces.

4. Strategic Priority: Enhance Information Management and Research

GOAL: Quality research and information systems will support workforce planning and decision-making.

Strategic Initiatives

4.1 Promote Awareness of Workforce Skills Issues and Trends

- a) Engage industry stakeholders in longer-term planning to prepare for future threats of workforce labour and skills shortages.
- b) Engage DMO's, Sector Associations, and RTO's in developing communication strategies to build awareness and reach owners/operators.

4.2 Increase Research Effectiveness

- a) Through Sector Associations, DMO's, RTO's, Workforce Planning Boards, CTHRC and OTEC, identify research and information gaps and engage industry in subsequent research projects.
- b) Through Sector Associations, DMO's, RTO's, Workforce Planning Boards, CTHRC and OTEC, ensure there is awareness of available resources for workforce planning.
- c) Leverage the National Satellite Account - Tourism Human Resource Module to enhance provincial tourism data and promote alignment of provincial and national research.
- d) Encourage communications and data-sharing between regional Workforce Planning Boards, OTEC, MTCS, and other government bodies, to define research priorities and to ensure consistency and continuity with research definitions.
- e) Leverage universities' research and student resources.

4.3 Make Resource and Training Program Information Accessible

- a) Develop a comprehensive provincial database of training options, tools and resources to reduce duplication and improve industry access.
- b) Utilize technology to provide regional access and to facilitate the sharing of communications, information, research, and best practices, thereby avoiding duplication.

CRITICAL SUCCESS FACTORS

During the consultation stages and the development of the strategy document, several critical success factors were identified that are essential for the effective achievement of the plan objectives and for the successful implementation of the strategy. These critical success factors are outlined in detail below.

Industry & Government Engagement

First and foremost there must be support and buy-in to the Strategy by the tourism industry and the Provincial government. Tourism organizations such as the Sector Associations, RTO's and DMO's will be important ambassadors in raising awareness of the Strategy and gaining commitment from tourism businesses as the Strategy is implemented. It is also important that the Ministry of Tourism, Culture and Sport (MTCS) is the voice of Provincial government to streamline communication and funding opportunities between other government bodies.

Funding

Many of the initiatives in the Strategy will require funding to be implemented effectively. The industry, led by the Tourism Industry Association of Ontario (TIAO) will need to work with the Ontario Ministry of Tourism, Culture and Sport to ensure monies are secured to support the Implementation Plan. In the past, tourism workforce development initiatives have received short shrift as marketing and product development have garnered a higher priority. Consequently, inadequate resources have impeded progress in this area.

Advocacy

Several industries have been effective in raising the profile of their workforce development needs. As a result, they have been successful in obtaining training resources, apprenticeship designations and access to labour market programs such as the Provincial Nominee Program. The tourism industry has not placed a high priority on advocating for support in these areas. The Ontario Tourism Workforce Development Strategy identifies a number of subject areas where a strong advocacy plan is needed.

Collaboration & Partnerships

Many of the initiatives included in the Strategy require collaboration and partnerships between all levels of Government, TIAO, OTEC, Education, Labour, Workforce Planning Boards, and Industry Organizations (which include RTO's, Sector Associations and DMO's) to ensure the strategy is successful, the implementation plan is executed and the deliverables are achieved.

Technology

The Tourism Workforce Development Audit identified a number of situations where businesses were not able to provide training for their staff due to geographic distance, lack of resources and inability to provide time off for attending training. The use of technology is recognized as one way to mitigate the impact of these barriers. Online courses, web-based workshops and self-directed training can all contribute to broader accessibility for training and development of staff. In addition, technology can support the industry in sharing and accessing information and resources.



Research

Conducting research and disseminating results are important underpinnings for tourism organizations and businesses in developing their human resource plans for the future. Coordination of research initiatives is important to avoid duplication and obtain better value for research dollars invested.

Input to Policy & Regulatory Development

There are many examples where policy and legislative changes have created unintended negative consequences for tourism businesses. The industry, led by the Tourism Industry Association of Ontario (TIAO) must be vigilant to those policies and regulations that have the potential to impede the growth of the tourism industry and be prepared to advocate on behalf of the industry.

Why this Plan is Important

It should be recognized that a highly skilled workforce, delivering exceptional customer service is part of the “tourism experience” we have to offer. This “experience” will be compromised, if in the future, businesses are hampered by lack of training for staff, inability to attract adequate labour supply, or by a general lack of interest in developing the tourism workforce.

Special Considerations

In reviewing the Strategy, 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.

As the Strategy presented here is implemented, it will be important to engage and build on these, and other, successful tourism workforce development models and projects.

IMPLEMENTATION PLAN

1. STRATEGIC PRIORITY: Foster an Environment of Collaboration and Coordination

GOAL: Workforce Development is a priority for Ontario's Tourism sector and the industry works together to implement the Ontario Tourism Workforce Development Strategy.

	Strategic Initiatives	Tactics	Accountability	Year
1.1	Create a Tourism Workforce Council (See Appendix A)	<ul style="list-style-type: none"> Recruit membership and set terms of reference. Hold first meeting in June 2012. Identify Strategy Implementation Organization. 	TIAO	1
		<ul style="list-style-type: none"> Define Workforce Development definitions and metrics. Communicate strategy and organizational roles to industry. 	TIAO Workforce Council Implementation Organization	1
1.2	Increase Provincial Leadership	<ul style="list-style-type: none"> Advocate for tourism workforce development funding and policy support. Promote active collaboration of national, provincial, regional and inter-ministerial bodies. Leverage OTEC's role in provincial and national workforce initiatives for the province. 	TIAO MTCS	1 - 5
1.3	Provide a Framework for Workforce Development	<ul style="list-style-type: none"> Begin developing a workforce development planning template for industry that provides a tool for regional and organizational planning and includes: research, training inventories, stakeholder lists, measures of success/metrics, career awareness/Discover Tourism resources, etc.(See Appendix A). 	Workforce Council Implementation Organization	1
		<ul style="list-style-type: none"> Provide the workforce planning template and consult with industry organizations on the implementation. 	Implementation Organization	2
		<ul style="list-style-type: none"> Communicate workforce development framework to industry networks. 	Implementation Organization Industry Organizations ²⁵	2

²⁵ This term is used to represent Regional Tourism Organizations (RTO's), Sector Associations and Destination Marketing/Management Organizations (DMO's).

	Strategic Initiatives	Tactics	Accountability	Year
1.3	Cont'd	<ul style="list-style-type: none"> Conduct workshops and consultations on utilization of framework. 	Implementation Organization	3
		<ul style="list-style-type: none"> Secure funding for a workforce development online portal to support provincial access to inventories, research, resources and planning tools. 	TIAO	3
		<ul style="list-style-type: none"> Design, launch and host the workforce development online portal. 	Implementation Organization	3
		<ul style="list-style-type: none"> Beta test and launch workforce development online portal and support regional registration and access. 	Implementation Organization	4-5
1.4	Develop a Coordinated Education Network	<ul style="list-style-type: none"> Define components of a Collaboration Agreement/MOU with provincial educational networks. 	TIAO Workforce Council Implementation Organization	1
		<ul style="list-style-type: none"> Formalize provincial collaboration agreements (School Boards, Colleges and Universities). Develop national educators' network (e.g. LinkBC). 	Implementation Organization Ministry of Education School Boards HOHTO University Networks CTHRC	2
		<ul style="list-style-type: none"> Develop articulation strategy and begin mapping provincial learning outcomes against national standards. 	Workforce Council Implementation Organization HOHTO CTHRC	3 - 5
1.5	Build Awareness of Workforce Development Networks, Tools and Resources	<ul style="list-style-type: none"> Create a provincial and regional communication strategy to share information and resources and build awareness of workforce research, resources and programming streams – See 1.3 “Provide a Framework for Workforce Development”. 	TIAO Workforce Council Implementation Organization	2
		<ul style="list-style-type: none"> Assess workforce development inventories and resources to support regional plans, achieve economies of scale in provincial and regional programming. 	Implementation Organization	2 -5

2. STRATEGIC PRIORITY: Develop a High Performance Workforce

GOAL: Ontario's tourism workforce is recognized for progressive human resource practices, service, quality and productivity.

	Strategic Initiatives	Tactics	Accountability	Year
2.1	Establish a Taskforce to Develop Provincial Service Standards	<ul style="list-style-type: none"> Provide industry organizations with occupational standards and service training support through the Workforce Development Framework and Planning Template (See 1.3). 	Implementation Organization	2
		<ul style="list-style-type: none"> Develop the terms of reference for and establish a Task Force to develop provincial service standards. 	TIAO Workforce Council	3-5
2.2	Improve Access to Training and Development	<ul style="list-style-type: none"> Compile and update resources, standards and training supplier inventories (volunteer, front-line and management) as well as workforce development stakeholder lists. 	Implementation Organization	1
		<ul style="list-style-type: none"> Provide inventories and workforce development stakeholder lists to industry organizations through the Workforce Development Framework and Planning Template (See 1.3). Provide consultation support to industry organizations on the integration, communication, and distribution of inventories and stakeholder lists to regional industry. 	Implementation Organization	1-2
		<ul style="list-style-type: none"> Collaborate with industry organizations to communicate professional Qualifications Frameworks to industry in order to clarify career and education pathways between academic channels and the workplace. 	Implementation Organization Industry Organizations Education Networks	1-5
		<ul style="list-style-type: none"> Upload inventories and workforce development stakeholder lists to the workforce development online portal and promote the portal to the tourism businesses through industry organizations. 	Implementation Organization	3-5

	Strategic Initiatives	Tactics	Accountability	Year
2.3	Establish Workforce Development Metrics	<ul style="list-style-type: none"> Develop and communicate workforce development metrics to track industry workforce skills development: <ul style="list-style-type: none"> Occupational Standards Downloads Training Participation Rates Certification Rates Community Employment Results Labour Shortage Projections by Occupation Workplace Skills Assessments Visitor Satisfaction Surveys Visitor Spending 	TIAO Workforce Council Implementation Organization Workforce Planning Boards	1
		<ul style="list-style-type: none"> Support industry organizations in utilizing the functionality of the workforce development online portal to track workforce development metrics in real time to conduct effective labour market planning (See 1.3). 	Implementation Organization	3-5
2.4	Establish Workforce Productivity Metrics	<ul style="list-style-type: none"> Provide H.R. tools, resources and performance management templates to industry organizations through the Workforce Development Framework and Planning Template (See 1.3). 	Implementation Organization	1-2
		<ul style="list-style-type: none"> Further develop successful recognition program models to promote management and employee achievement levels. 	TIAO Workforce Council Implementation Organization Industry Organizations	1-2
		<ul style="list-style-type: none"> Secure funding for the <i>Employer of Choice</i> feedback and measurement model to guide H.R. development practices in SME's. 	TIAO Implementation Organization	2
		<ul style="list-style-type: none"> Integrate the <i>Employer of Choice</i> program with the workforce development online portal and support industry organizations in communicating the program regionally. 	Implementation Organization	5

3. STRATEGIC PRIORITY: Focus on Workforce Attraction & Retention

GOAL: Ontario's tourism industry is successful in attracting and retaining talent to achieve its service and competitiveness goals.

	Strategic Initiatives	Tactics	Accountability	Year
3.1	Promote Tourism as a Career	<ul style="list-style-type: none"> Provide <i>Discover Tourism</i> resources to industry organizations through the Workforce Development Framework and Planning Template (See 1.3). 	Implementation Organization	1
		<ul style="list-style-type: none"> Provide consultation support to industry organizations on the integration, communication, and distribution of <i>Discover Tourism</i> resources to businesses. 	Implementation Organization	1-5
		<ul style="list-style-type: none"> Develop a provincial Career Awareness Strategy that includes branding, distribution and stakeholder engagement. 	TIAO Workforce Council Implementation Organization	3
		<ul style="list-style-type: none"> Establish industry participation framework through workforce development online portal (See 1.3) to engage industry in Career Awareness activities through efficient linkages with education and employment services channels. 	Implementation Organization Industry Organizations Education Networks	4
3.2	Develop Attraction Strategies to Grow Workforce	<ul style="list-style-type: none"> Provide consultation support to industry organizations to identify and target priority labour pools for each region (newcomers, youth, Aboriginal communities, mature workers, international students etc.). 	Implementation Organization	1-5
		<ul style="list-style-type: none"> Provide linkages to relevant educational and workforce development stakeholders through the Workforce Development Framework and Planning Template (See 1.3). 	Implementation Organization	1-5
		<ul style="list-style-type: none"> Where programming gaps are identified, advocate for the development and funding of local training, employment and hiring models that mitigate labour shortages and target regional priority labour pools. 	TIAO, MTCS, Workforce Council, Implementation Organization, Education Networks, Other Government Bodies	1-5

	Strategic Initiatives	Tactics	Accountability	Year
3.3	Develop Strategies to Retain Talent	<ul style="list-style-type: none"> Utilize the established Framework, Planning Template, and Online Portal to support industry with research, training inventories, stakeholder lists, measures of success/metrics, career awareness/Discover Tourism resources, etc. (See 1.3). 	Implementation Organization	3-5
		<ul style="list-style-type: none"> Advocate to ensure that immigration policies and programs are responsive to industry needs. 	TIAO MTCS	1-5
		<ul style="list-style-type: none"> Collaborate with industry organizations to identify delivery channels and funding to develop regional small-business and entrepreneurship training and support models. 	Implementation Organization Industry Organizations	2
3.4	Build Employer and Employee Recognition Programs	<ul style="list-style-type: none"> Provide H.R. and succession planning resources to industry organizations through the Workforce Development Framework and Planning Template (See 1.3). 	Implementation Organization	1
		<ul style="list-style-type: none"> Collaborate with industry organizations to develop regional plans for assisting managers and business owners with employee engagement and retention. 	Implementation Organization Industry Organizations	2-3
		<ul style="list-style-type: none"> Support industry organizations in working with regional industry to enhance the attractiveness and experience of working in the sector by building businesses' capacity for integrating and engaging priority labour pools. 	Implementation Organization	2-5
		<ul style="list-style-type: none"> Integrate regional recognition programs into provincial and national recognition programs. 	Implementation Organization	2
3.5	Develop Competitiveness Strategy for Future Workforce	<ul style="list-style-type: none"> Provide industry organizations with compensation data and best practices through the Workforce Development Framework and Planning Template (See 1.3) to support international competitiveness at the regional level. 	Implementation Organization	1-5
		<ul style="list-style-type: none"> Promote workforce skills issues, essential skills assessment and training resources through the Workforce Development Framework and Planning Template (See 1.3). 	TIAO Implementation Organization	1-5

	Strategic Initiatives	Tactics	Accountability	Year
3.5	Cont'd	<ul style="list-style-type: none"> As part of the provincial Career Awareness Strategy (See 3.1) develop and communicate the provincial tourism employee value proposition to demonstrate the compensation and lifestyle attributes of a career in Ontario Tourism. 	TIAO Workforce Council Implementation Organization	3
		<ul style="list-style-type: none"> As part of the provincial Career Awareness Strategy (See 3.1) develop a plan to attract and retain skilled workers from other sectors and jurisdictions. 	Workforce Council Implementation Organization	3
		<ul style="list-style-type: none"> Engage government agencies such as MEDI, CIC and Service Canada to plan a coordinated approach to international recruitment that links industry with overseas labour markets. 	TIAO MTCS Workforce Council Implementation Organization	3-5

4. STRATEGIC PRIORITY: Enhance Information Management & Research

GOAL: Quality research and information systems will support workforce planning and decision-making.

	Strategic Initiatives	Tactics	Accountability	Year
4.1	Promote Awareness of Workforce Skills Issues and Trends	<ul style="list-style-type: none"> Provide TIAO and industry organizations with labour market research and data sources through the Workforce Development Framework and Planning Template (See 1.3). Provide consultation support to TIAO and industry organizations on the integration of long-term labour market planning in regional workforce development strategies. 	Implementation Organization	1-2
		<ul style="list-style-type: none"> Support TIAO and industry organizations in communicating labour market research, workforce skills issues and trends to regional businesses to promote long-term H.R. planning. 	Implementation Organization	1-5

	Strategic Initiatives	Tactics	Accountability	Year
4.2	Increase Research Effectiveness	<ul style="list-style-type: none"> Collaborate with TIAO, Workforce Council, RTO's, MTCS, OTEC, CTHRC and Workforce Planning Boards to identify provincial and regional research and information gaps. 	Implementation Organization	1
		<ul style="list-style-type: none"> Collaborate with Workforce Council, TIAO, MTCS, OTEC and CTHRC to identify opportunities to integrate regional research and labour market analysis activities with the architecture of the National Satellite Account- Tourism Human Resource Module. 	Implementation Organization	2
		<ul style="list-style-type: none"> Support industry organizations in engaging local Workforce Planning Boards in the national tourism labour market research architecture and distribution channels. 	Implementation Organization Workforce Planning Boards	2-3
		<ul style="list-style-type: none"> Support industry organizations in linking regional businesses with college and university networks through the Workforce Development Framework and Planning Template (See 1.3) to maximize student and institutional research opportunities. 	Implementation Organization	2-5
4.3	Make Research and Training Program Information Accessible	<ul style="list-style-type: none"> Develop a comprehensive inventory of training options, tools and resources to provide to industry organizations through the Workforce Development Framework and Planning Template (See 1.3). 	Implementation Organization	1
		<ul style="list-style-type: none"> Upload inventory of training options, tools and resources onto the workforce development online portal to provide regional access to the resource database. 	Implementation Organization	3
		<ul style="list-style-type: none"> Support industry organizations in promoting regional businesses and stakeholders' access to, and utilization of, the workforce development online platform and resources. 	Implementation Organization	4-5

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APPENDIX A – LIST OF ABBREVIATIONS

List of Abbreviations

AODA	Accessibility for Ontarians with Disabilities Act
ASETS	Aboriginal Skills and Employment Training Strategy
CATT	Canadian Academy of Travel and Tourism
CIC	Citizen and Immigration Canada
CTHRC	Canadian Tourism Human Resource Council
DMO	Destination Marketing/Management Organization
HOHTO	Heads of Hospitality and Tourism Ontario
H.R.	Human Resources
HRM	Human Resource Module
HRSDC	Human Resources and Skills Development Canada
MCI	Ministry of Citizenship and Immigration
MCSS	Ministry of Community and Social Services
MEDI	Ministry of Economic Development and Innovation
MOU	Memorandum of Understanding
MTCS	Ministry of Tourism, Culture and Sport
MTCU	Ministry of Training, Colleges and Universities
NOC	National Occupational Classification
OCAS	Ontario College Application Services
OLC	Ontario Literacy Coalition
OMAFRA	Ontario Ministry of Agriculture, Food and Rural Affairs
OTEC	Ontario Tourism Education Corporation
OUAC	Ontario Universities Application Centre
ROI	Return on Investment
RTO	Regional Tourism Organization
SHSM	Specialist High Skills Major
SME	Small and Medium Enterprises
SRDC	Social Research and Demonstration Corporation
TIAC	Tourism Industry Association of Canada
TIAO	Tourism Industry Association of Ontario
TICO	Travel Industry Council Ontario
WHMIS	Workplace Hazardous Materials Information System

Definitions

Qualifications Framework: A professional development chart that CTHRC has developed for culinary and hospitality occupations that identifies the available credentialing pathways and their relative equivalency.

Industry Organizations: This term is used to represent Regional Tourism Organizations (RTO's), Sector Associations and Destination Marketing/ Management Organizations (DMO's).

Tourism Workforce Council: An advisory group incorporating broad representation of industry sectors and geographic regions. To be further defined.

Workforce Development Framework and Planning Template: A regional/sectoral workforce strategy guide accompanied with an inventory of resources, standards, training, models, and stakeholder lists to assist in conducting local and/or market specific planning.

APPENDIX B – 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 (e.g. 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 (e.g. 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.