



Simcoe Muskoka Workforce
Development Board

Commission développement
de la main-d'oeuvre
de Simcoe Muskoka

PRESENTATION ON TOURISM INDUSTRY IN SIMCOE AND MUSKOKA

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Overview of presentation

- ⦿ Defining the tourism sector; number of jobs in the tourism sector in Simcoe and Muskoka
- ⦿ Types of occupations
- ⦿ Characteristics of tourism labour force
- ⦿ Change in number of employers
- ⦿ Implications for a tourism labour market strategy
- ⦿ Discussion and next steps

DEFINING THE TOURISM SECTOR

NUMBER OF JOBS IN THE TOURISM SECTOR

Traditional tourism industry subsectors

ACCOMMODATION	TRANSPORTATION
→ 7211 Traveller accommodation	4811 Scheduled air transportation
→ 7212 RV parks and recreational camps	4812 non-scheduled air transportation
	4821 Rail transportation
FOOD AND BEVERAGE SERVICES	4831 Deep sea, coastal, Great Lakes transport
→ 7221 Full-service restaurants	4832 Inland water transportation
→ 7222 Limited-service restaurants	4851 Urban transit systems
→ 7224 Drinking places (alcoholic beverages)	4852 Interurban & rural bus transportation
	4853 Taxi and limousine service
RECREATION AND ENTERTAINMENT	4854 School & employee bus transportation
5121 Motion picture and video industries	4855 Charter bus industry
7111 Performing arts companies	4859 Other transit & passenger transportation
7112 Spectator sports	4871 Scenic & sightseeing transportation, land
→ 7115 Independent artists, writers, performers	4871 Scenic & sightseeing transportation, water
→ 7121 Heritage institutions	4871 Scenic & sightseeing transportation, other
7131 Amusement parks and arcades	5321 Automotive equipment rental & leasing
→ 7132 Gambling industries	
→ 7139 Other amusement & recreational industries	TRAVEL SERVICES
	5615 Travel arrangement & reservation services

Jobs present in tourism industry (select subsectors), Simcoe, Muskoka, Toronto, Ontario, 2006

	SIMCOE	MUSKOKA	TORONTO	ONTARIO
7115 Independent artists, writers, performers	325	150	6360	14810
7121 Heritage institutions	275	90	2350	7915
7132 Gambling industries	3065	10	1675	22590
7139 Other amusement industries	2350	765	7690	51940
7211 Traveller accommodation	1955	1555	12155	49920
7212 RV parks and recreational camps	200	480	330	5235
7221 Full-service restaurants	5030	890	31185	143300
7222 Limited-service eating places	5480	815	23715	132140
7224 Drinking places (alcoholic beverages)	465	30	3160	13545
TOURISM INDUSTRY TOTAL	19145	4785	88620	441395
TOURISM AS % OF ALL JOBS	12.0%	18.4%	6.6%	7.9%
# OF RESIDENTS EMPLOYED IN TOURISM	20445	3755	90820	463220
% OF RESIDENTS EMPLOYED IN TOURISM	9.4%	12.9%	7.3%	7.5%

Tourism visits, Simcoe, Muskoka and Ontario

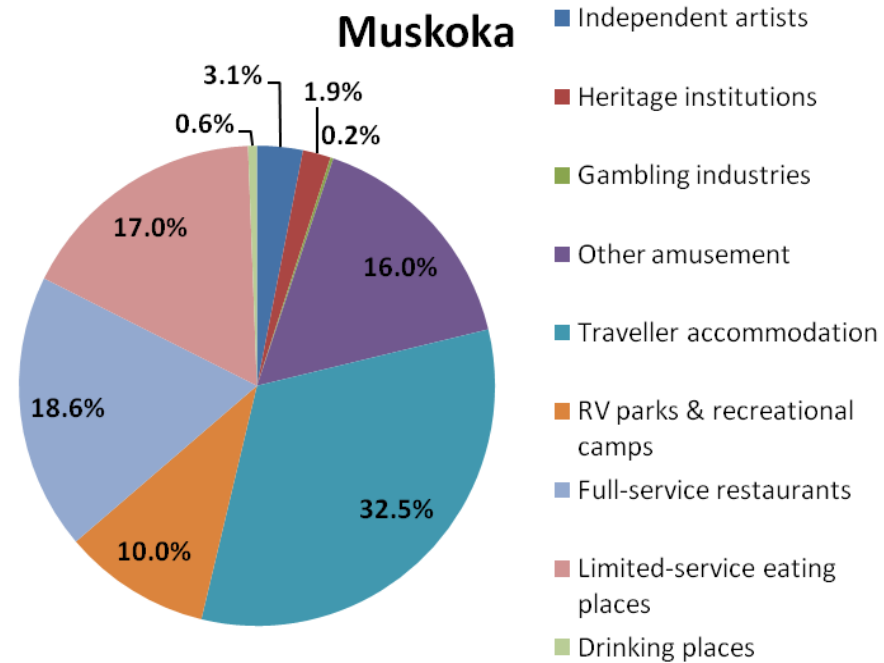
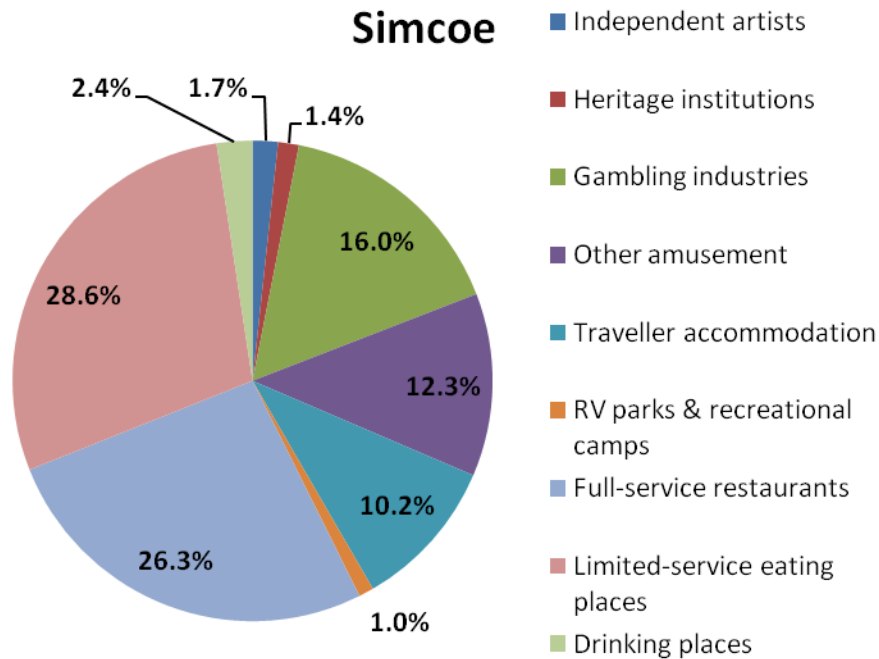
	Population (2011)	Person visits (2009)
Ontario	12,851,821	101,461,000
Simcoe	446,063	6,352,000
Simcoe as % of Ontario	3.5%	6.3%
Muskoka	58,047	2,320,000
Muskoka as % of Ontario	0.5%	2.3%

Industry subsectors with high Location Quotient in Simcoe and Muskoka, likely related to vacation cottage industry, 2006

	JOBS		LQ		Increment	
	Simcoe	Muskoka	Simcoe	Muskoka	Simcoe	Muskoka
2361 Residential building construction	1795	775	1.38	3.65	169	510
4441 Building material and supplies dealers	1600	635	1.46	3.53	230	410
4442 Lawn and garden equipment and supplies stores	265	125	2.04	5.87	103	98
4451 Grocery stores	4715	905	1.31	1.54	216	170
4453 Beer, wine and liquor stores	445	75	1.47	1.52	67	13
4471 Gasoline stations	865	155	1.61	1.76	193	45
4511 Sporting goods, hobby, musical instrument stores	675	165	1.08	1.62		38
4529 Other general merchandise stores	1540	365	1.29	1.87	48	121
5312 Offices of real estate agents and brokers	1740	420	1.48	2.19	270	180
5323 General rental centres	90	50	4.7	15.95	66	46
5617 Services to buildings and dwellings	1590	455	1.02	1.79		137
COTTAGE RESORT INDUSTRY INCREMENT					1362	1768
INCREMENT AS PERCENTAGE OF ALL JOBS					0.9%	6.8%

Increment refers to jobs over 1.25

Percentage distribution of tourism sector jobs by subsector, Simcoe and Muskoka, 2006



TYPES OF OCCUPATIONS

Analysis of occupations

There are over 500 occupations listed in the National Occupational Code.

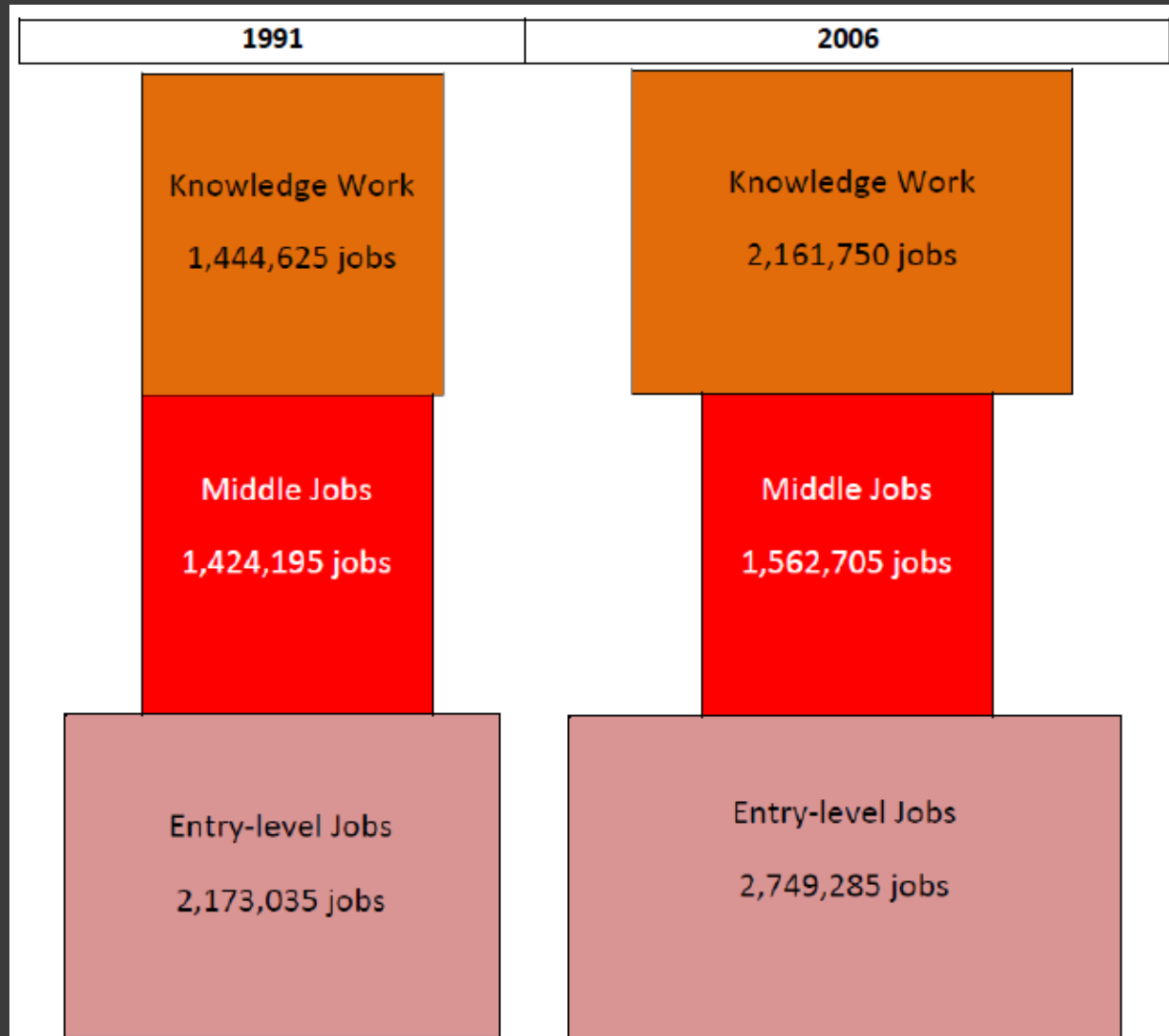
We can group them by:

- Occupational categories
(e.g. Sales & Service, Manufacturing occupations)
- Skill levels
(e.g. require university degree or high school diploma)
- Broad sectors

PRIMARY SECTOR	Farming, fishing, forestry, mining, oil and gas
SECONDARY SECTOR	Manufacturing
TERTIARY SECTOR	Services

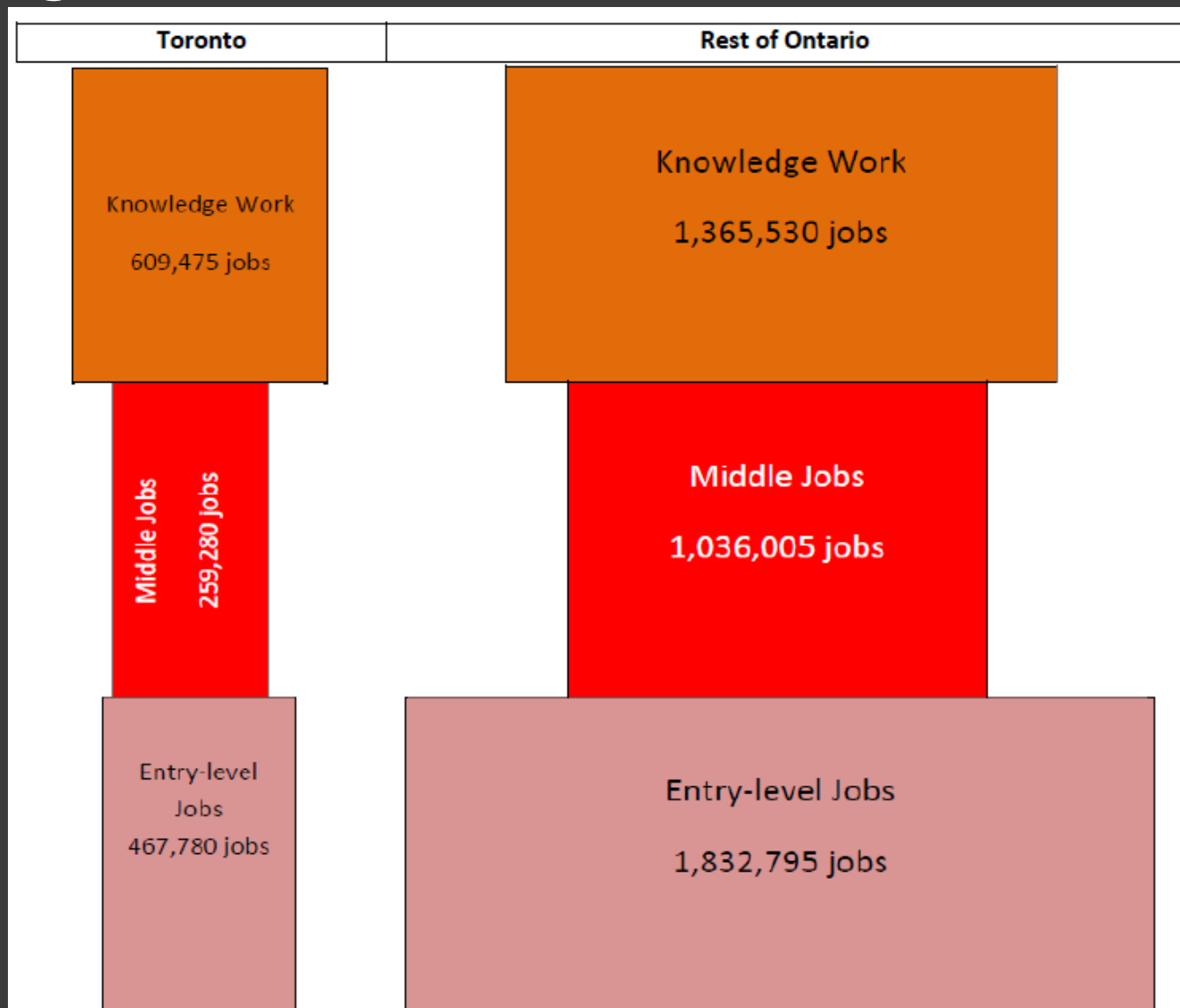
<p>KNOWLEDGE WORK</p>	<p>QUALIFICATION:</p> <p>University degree, or Three-year college diploma, or A highly specialized skill</p> <p>Senior managers; doctors; engineers; accountants; registered nurses, legal secretaries</p>
<p>MIDDLE JOBS</p>	<p>QUALIFICATION:</p> <p>Do not require a university degree, maybe two-year college or trade certificate; Or requires the accumulation of experience and skills acquired in the workplace</p> <p>Supervisors; food or retail managers; payroll clerks; secretaries; dental assistants; chefs; tradespeople</p>
<p>ENTRY-LEVEL JOBS</p>	<p>QUALIFICATION:</p> <p>At most a high school diploma and some on-the-job orientation</p> <p>General office clerks; cooks; retail salespersons; cashiers; cleaners; labourers</p>

Comparison of distribution of jobs by skill categories, Ontario, 1991-2006



Size of boxes is to scale, for comparison's sake.

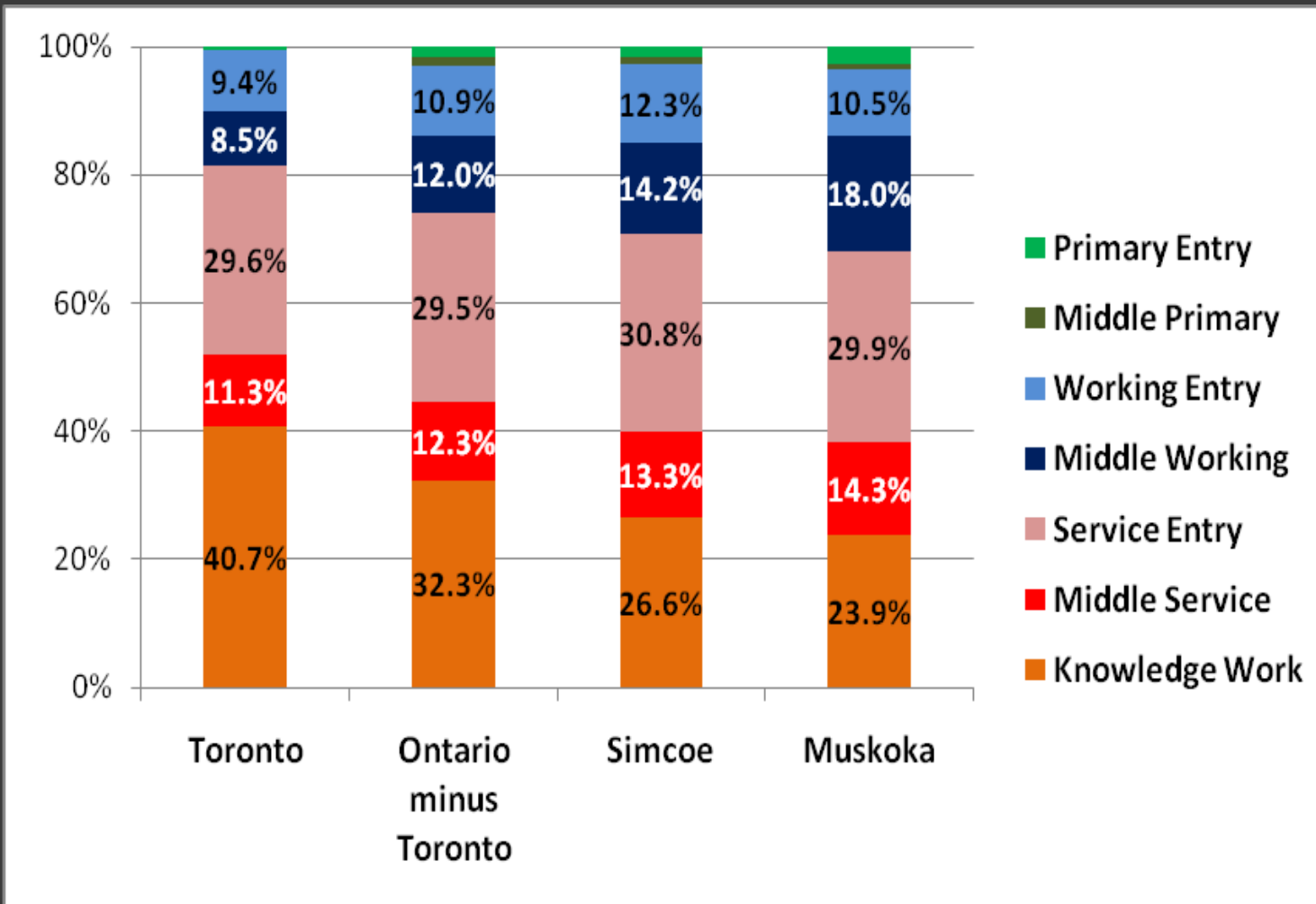
Comparison of distribution of jobs by skill categories, Toronto and the rest of Ontario, 2006



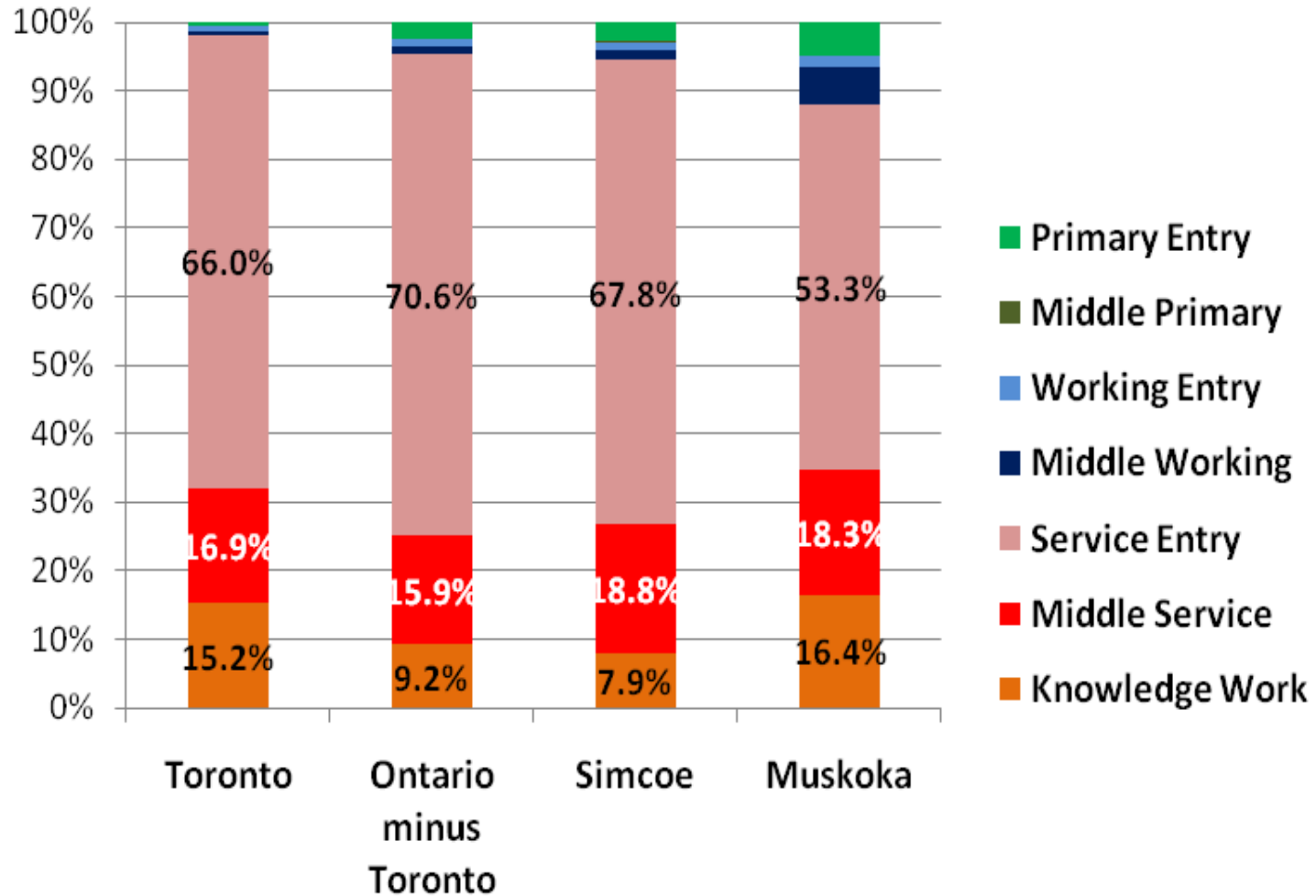
Size of boxes is to scale, for comparison's sake.

KNOWLEDGE WORK	K-WORK	
MIDDLE JOBS	MIDDLE SERVICE	
	MIDDLE WORKING	
	MIDDLE PRIMARY	
ENTRY-LEVEL JOBS	SERVICE ENTRY	
	WORKING ENTRY	
	PRIMARY ENTRY	

Distribution of employed residents by the skills/sector framework, Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006



Distribution by the skills/sector framework of residents employed in the tourism sector, Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006



20 largest occupations in tourism sector in Ontario, listing number of employed residents in Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006

	TORONTO	ONTARIO MINUS TORONTO	SIMCOE	MUSKOKA
Food counter attendants and kitchen helpers	14785	77720	4095	530
Food and beverage servers	11990	46495	2245	285
Cooks	8565	36190	1790	290
Restaurant and food service managers	7305	28110	1435	245
Cashiers	5025	17230	780	65
Program instructors in recreation	3305	12880	605	90
Light duty cleaners	3225	11270	835	190
Chefs	4455	8600	350	150
Bartenders	2950	9340	485	20
Food service supervisors	1920	9430	440	140
Casino occupations	445	8470	1305	45
Landscaping/grounds maintenance labourers	345	7805	540	150
Accommodation service managers	885	6480	315	210
Maîtres d'hôtel and hosts	1290	5535	255	45
Retail salespersons and sales clerks	955	5680	405	50
Hotel front desk clerks	1265	4915	270	110
Operators in amusement and sport	695	5485	390	40
Janitors and building superintendents	975	4650	270	50
Painters, sculptors and other visual artists	1780	3345	150	75
Bakers	565	3550	120	45

The shaded boxes highlight the 10 largest occupations in Simcoe and Muskoka.

Percentage of residents employed in an occupation who are working in the tourism sector, Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006

	TORONTO	ONTARIO MINUS TORONTO	SIMCOE	MUSKOKA
Hotel front desk clerks	100.0%	99.6%	100.0%	100.0%
Casino occupations	91.8%	97.9%	99.6%	100.0%
Maîtres d'hôtel and hosts	91.2%	94.5%	98.1%	100.0%
Bartenders	91.3%	89.9%	89.8%	80.0%
Restaurant and food service managers	87.9%	88.2%	90.0%	89.1%
Accommodation service managers	78.0%	86.2%	91.3%	89.4%
Technical occupations, museums/art galleries	71.2%	87.9%	87.0%	66.7%
Food service supervisors	80.5%	84.5%	88.0%	100.0%
Food counter attendants and kitchen helpers	74.7%	77.8%	78.4%	70.2%
Painters, sculptors and other visual artists	79.6%	75.6%	81.1%	78.9%
Cooks	75.8%	77.0%	77.7%	74.4%
Chefs	78.7%	75.5%	72.9%	96.8%
Operators in amusement and sport	55.6%	71.3%	85.7%	100.0%
Other performers†	60.4%	65.0%	100.0%	0.0%‡
Outdoor sport and recreational guides	14.3%	69.4%	50.0%	0.0%‡
Executive housekeepers	47.3%	67.6%	71.4%	100.0%
Program instructors in recreation	54.3%	57.9%	65.1%	66.7%
Actors and comedians	58.6%	52.6%	80.0%	100.0%

† Includes acrobats, buskers, circus performers, clowns, fashion models, magicians, puppeteers and ventriloquists.

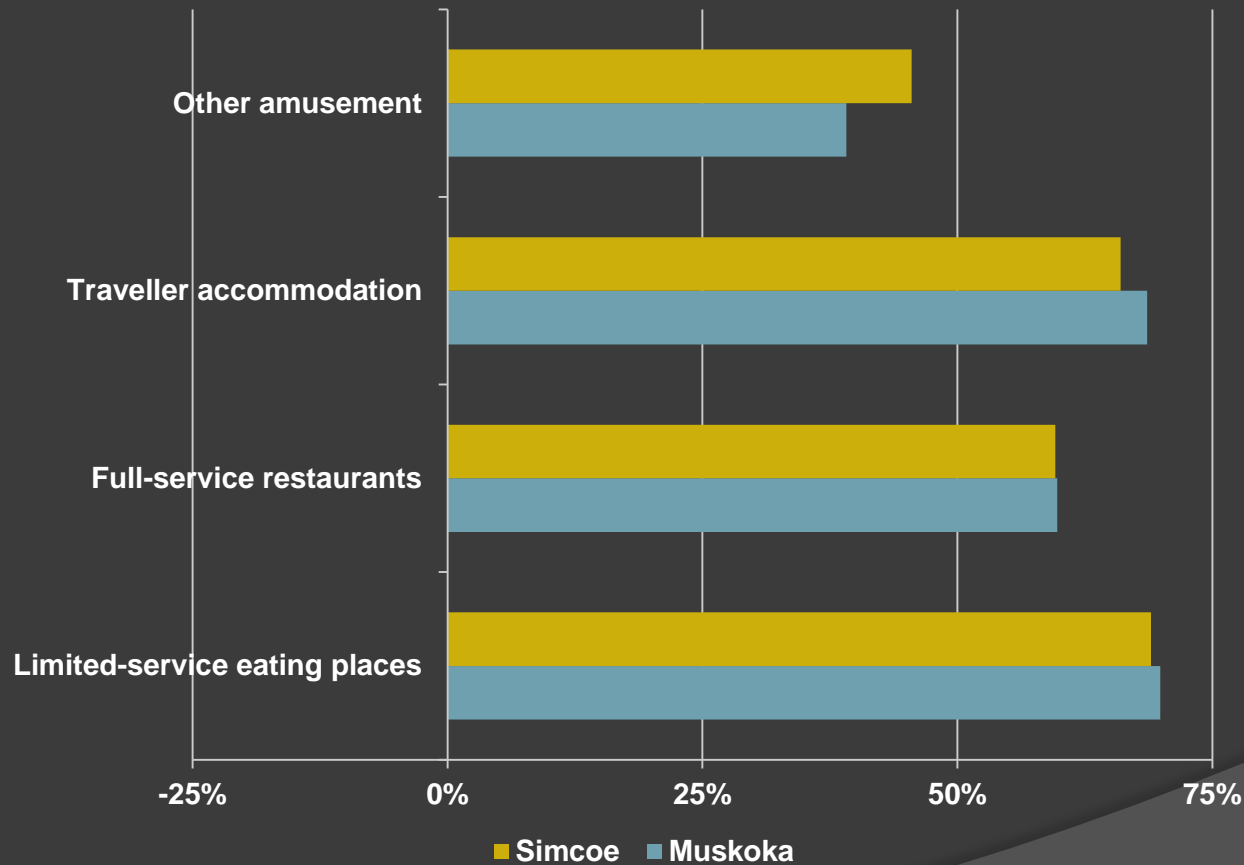
‡ For these categories there were no residents in Muskoka who reported working in these occupations in the 2006 Census. This is more likely a reporting error, that is, that they ended up being categorized under a different occupation.

CHARACTERISTICS OF TOURISM LABOUR FORCE

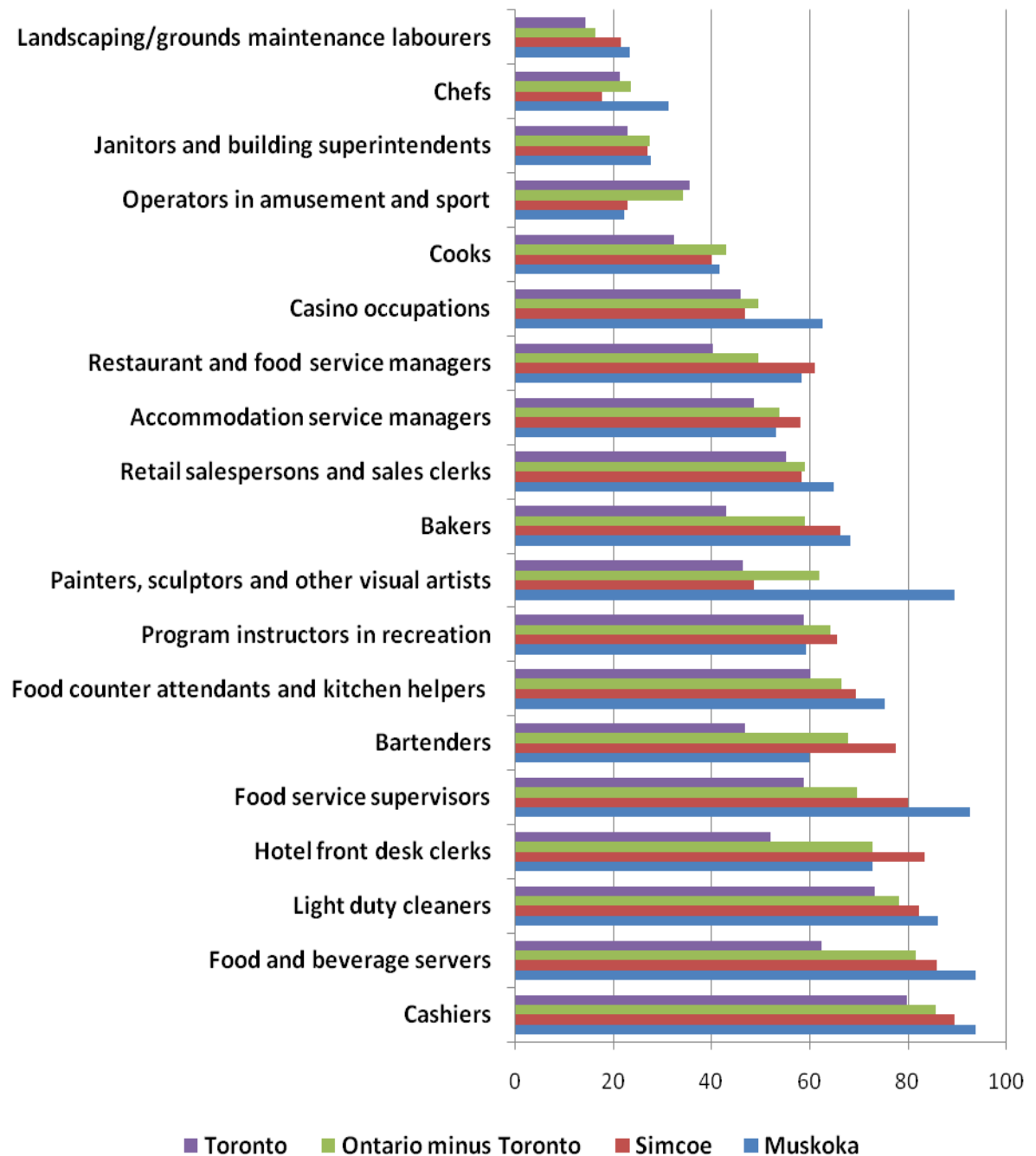
Labour force proportions by gender, tourism sector and all industries, Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006

	TOURISM INDUSTRY		ALL INDUSTRIES	
	Males	Females	Males	Females
TORONTO	50.1%	49.9%	51.9%	48.1%
ONTARIO MINUS TORONTO	41.8%	58.2%	52.3%	47.7%
SIMCOE	39.3%	60.7%	52.7%	47.3%
MUSKOKA	40.7%	59.3%	52.3%	47.7%

Percentage of females in the labour force by select tourism subsectors, Simcoe and Muskoka, 2006

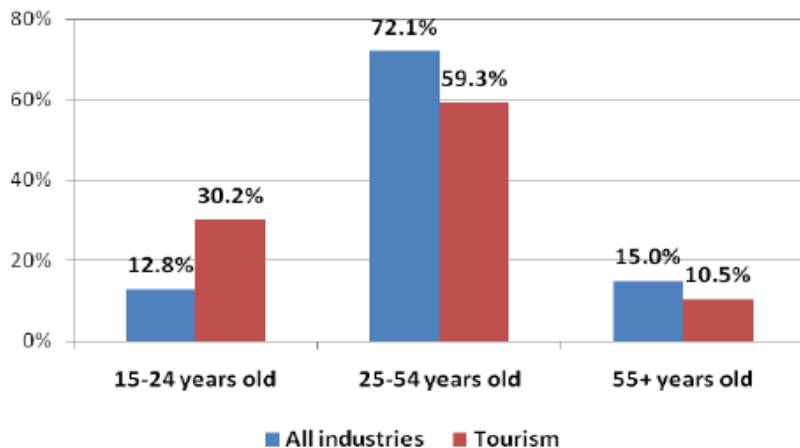


Percentage of female residents employed in occupations prevalent in the tourism sector, Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006

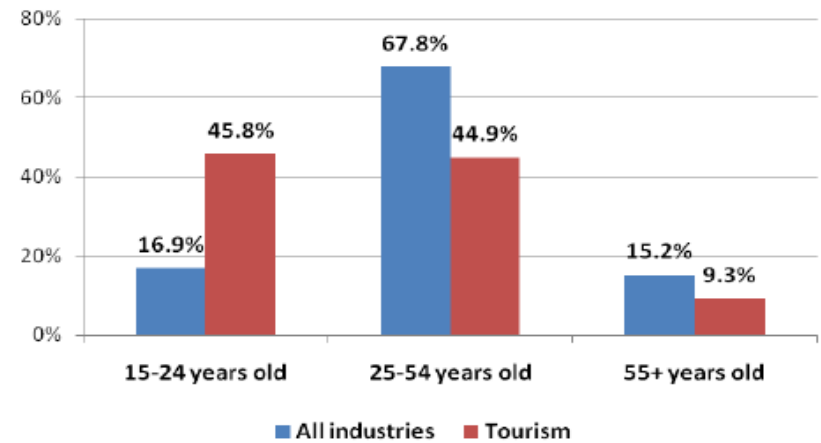


Age profile of resident force labour, tourism sector and all industries, Toronto, Ontario minus Toronto, Simcoe and Muskoka, 2006

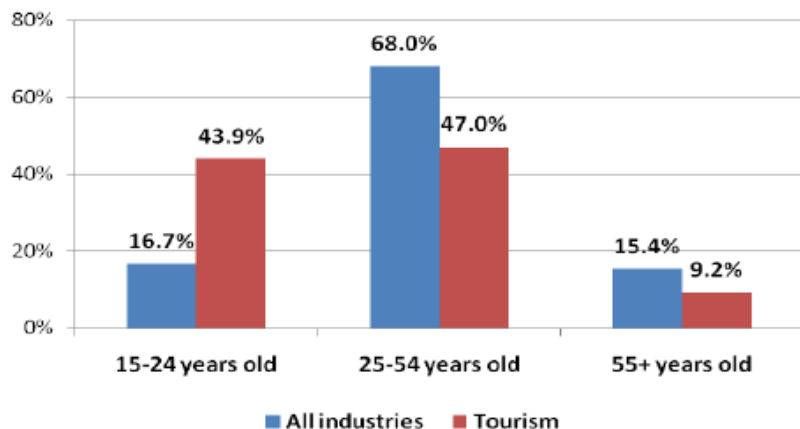
TORONTO



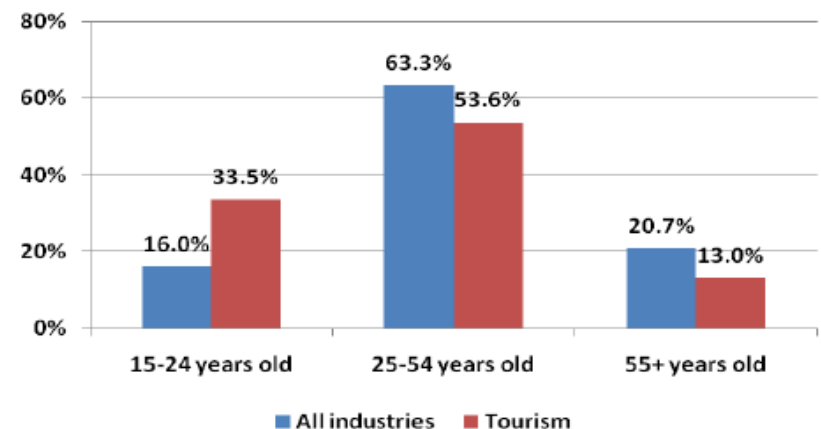
ONTARIO MINUS TORONTO



SIMCOE



MUSKOKA



Youth tourism labour force as percentage of all youth labour force, Toronto, Ontario, Simcoe and Muskoka, 2006

ONTARIO			
	ALL	MALES	FEMALES
15 to 24 years old	20.2%	17.1%	23.5%
15 to 19 years old	27.8%	25.0%	30.6%
20 to 24 years old	15.2%	11.9%	18.6%
TORONTO			
	ALL	MALES	FEMALES
15 to 24 years old	17.6%	16.0%	19.0%
15 to 19 years old	24.6%	23.0%	26.1%
20 to 24 years old	14.7%	13.2%	16.1%
SIMCOE			
	ALL	MALES	FEMALES
15 to 24 years old	25.4%	19.9%	31.2%
15 to 19 years old	33.9%	28.7%	38.8%
20 to 24 years old	18.2%	12.7%	24.3%
MUSKOKA			
	ALL	MALES	FEMALES
15 to 24 years old	28.2%	20.5%	36.5%
15 to 19 years old	35.2%	28.5%	42.1%
20 to 24 years old	21.6%	12.2%	31.0%

Educational attainment of all employed residents, Toronto, rest of Ontario, Simcoe and Muskoka, 2006

	No certificate, diploma or degree	High school certificate	Apprenticeship or trades certificate	College diploma	Bachelor's degree	Master's or earned doctorate degree
Toronto	11%	23%	6%	17%	23%	10%
Ontario minus Toronto	14%	28%	9%	23%	14%	5%
Simcoe	17%	30%	11%	25%	9%	2%
Muskoka	18%	30%	12%	22%	9%	2%

Some select tourism occupations

Entry-level occupations	Middle-level occupations	Managers
Food counter attendants Food and beverage servers Casino occupations Cooks Bartenders Maîtres d'hôtel and hosts Food service supervisors	Chefs Front desk clerks	Restaurant and food service managers Accommodation service managers

Educational attainment for some select tourism occupations, Toronto, rest of Ontario, and Simcoe, 2006

	No certificate, diploma or degree	High school certificate	Apprenticeship or trades certificate	College diploma	Bachelor's degree	Master's or earned doctorate degree
ENTRY-LEVEL POSITIONS						
Toronto	22%	40%	7%	15%	9%	2%
Ontario minus Toronto	22%	44%	7%	19%	5%	1%
Simcoe	22%	47%	7%	17%	4%	0%
MIDDLE-LEVEL POSITIONS						
Toronto	16%	27%	13%	27%	8%	2%
Ontario minus Toronto	13%	26%	15%	35%	5%	1%
Simcoe	11%	17%	14%	49%	0%	0%
MANAGERS						
Toronto	10%	29%	4%	21%	21%	5%
Ontario minus Toronto	13%	37%	6%	24%	12%	2%
Simcoe	13%	35%	7%	27%	11%	0%

Full-time employment, tourism sector and all industries, Simcoe, Muskoka, Toronto, and rest of Ontario, 2006

SIMCOE			MUSKOKA		
	All industries	Tourism		All industries	Tourism
Males	85%	57%	Males	83%	67%
Females	67%	52%	Females	66%	60%
ONTARIO MINUS TORONTO			TORONTO		
	All industries	Tourism		All industries	Tourism
Males	84%	55%	Males	84%	67%
Females	69%	49%	Females	74%	57%

CHANGE IN NUMBER OF EMPLOYERS

Canadian Business Pattern data

- Every six months (June and December), Statistics Canada surveys all employers
- Data tells us the number of employers by size of firm and by industry
- Change in number of firms a possible proxy for economic activity and employment

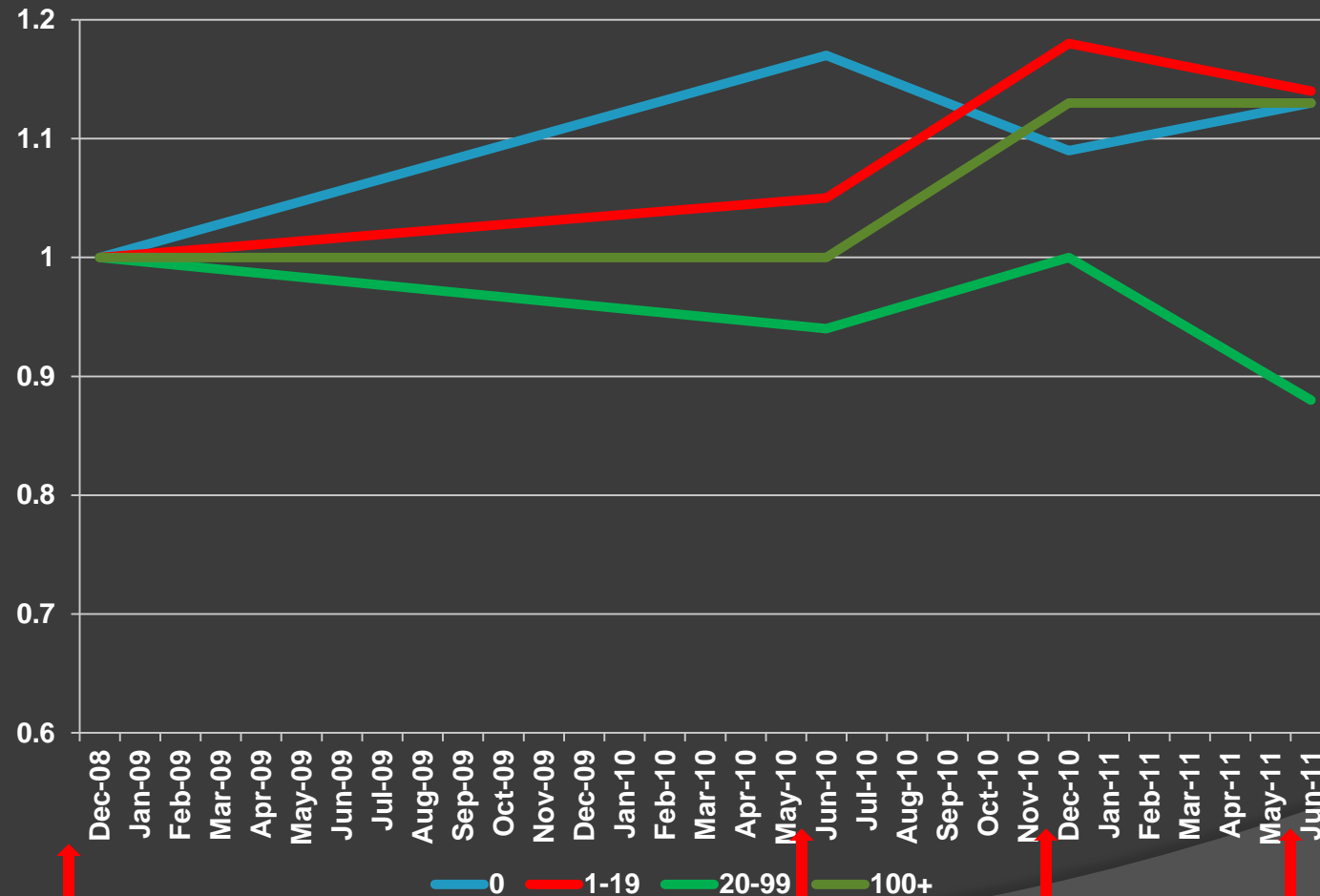
Accommodation services, Simcoe, Dec 08, June 10, Dec 10, June 11

	0	1-19	20-99	100+
December 2008	77	56	17	8
June 2010	90	59	16	8
December 2010	84	66	17	9
June 2011	87	64	15	9

Compare number of employers over time

- Baseline = December 2008
- Baseline = 1.0
- If number of employers increased 4%, then new figure is 1.04
- If number decreased by 3%, then new figure is 0.97

Accommodation services, Simcoe, Dec 08, June 10, Dec 10, June 11



Number of employees

"0" employees

87

1-19 employees

64

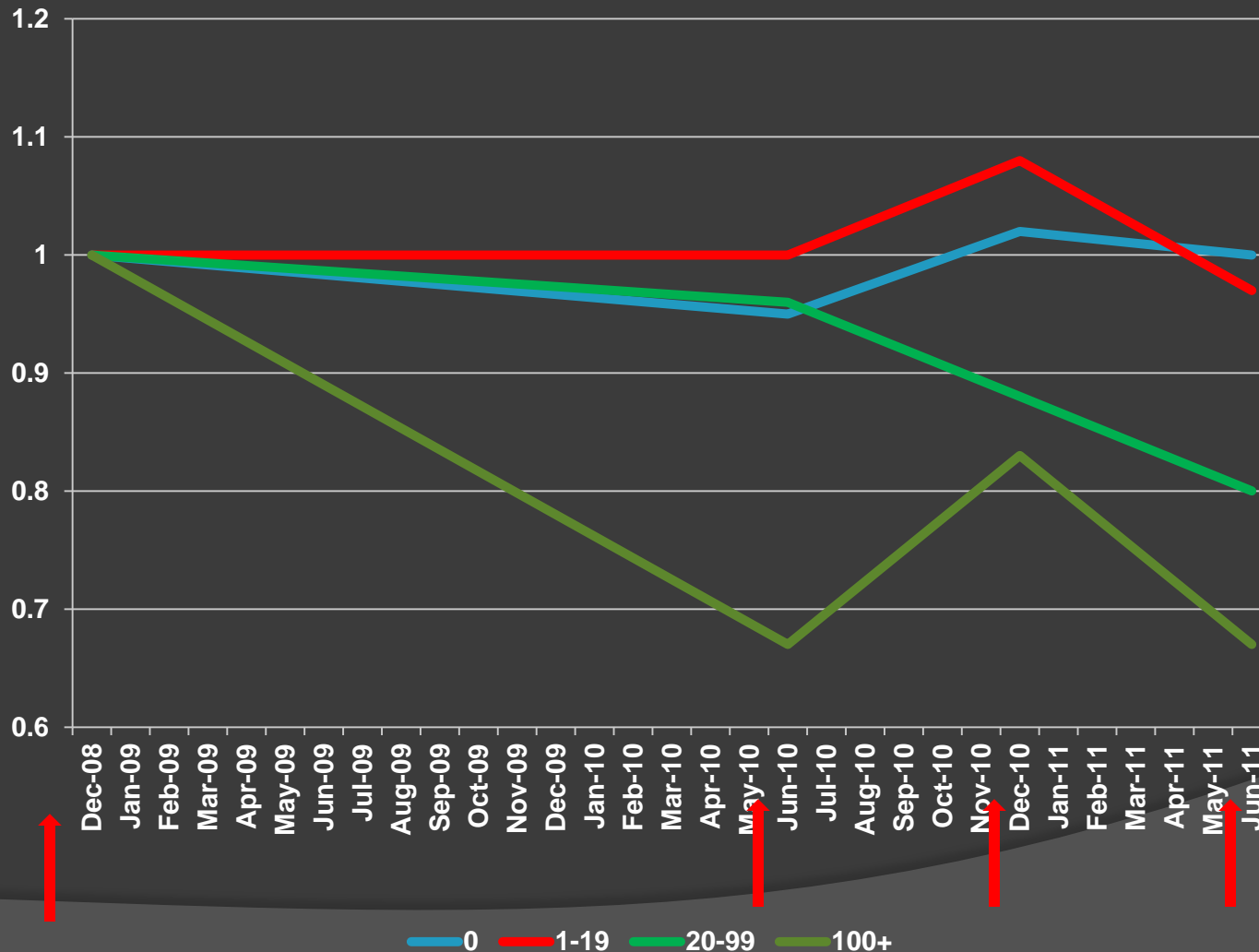
20-99 employees

15

100+ employees

9

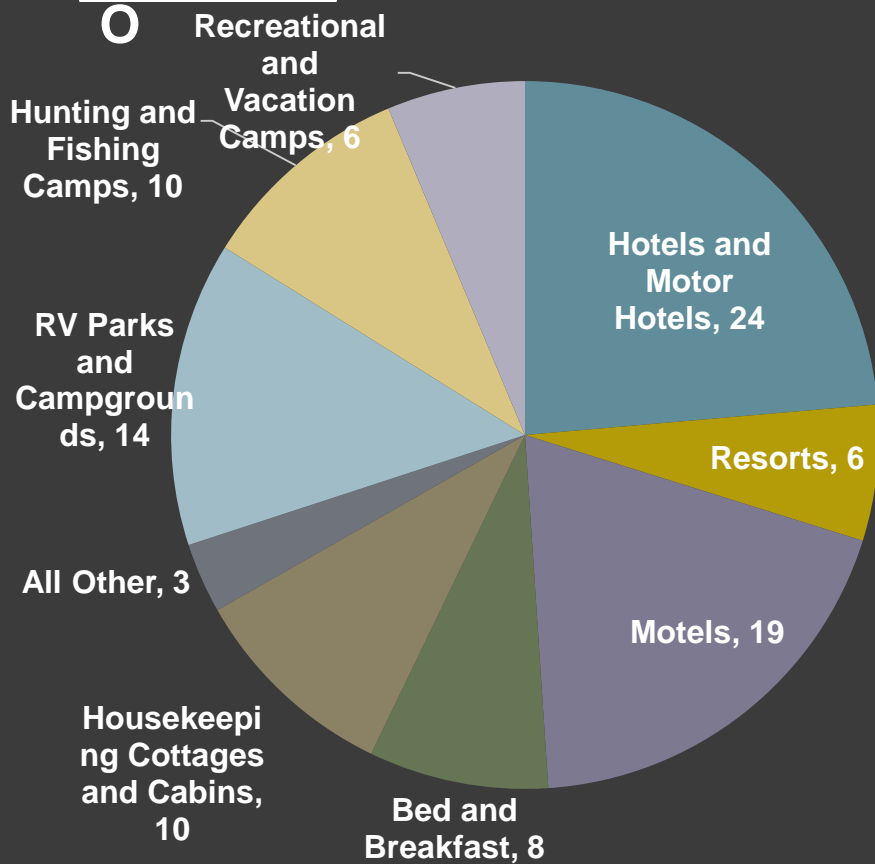
Accommodation services, Muskoka, Dec 08, June 10, Dec 10, June 11



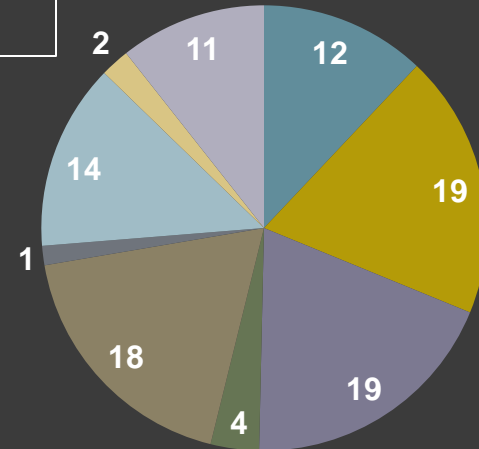
Number of employees	
"0" employees	66
1-19 employees	38
20-99 employees	20
100+ employees	4

Accommodation services Ontario, Muskoka, Simcoe, 2009

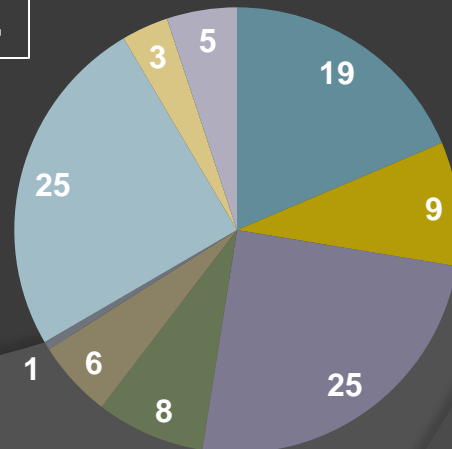
ONTARIO



MUSKOKA

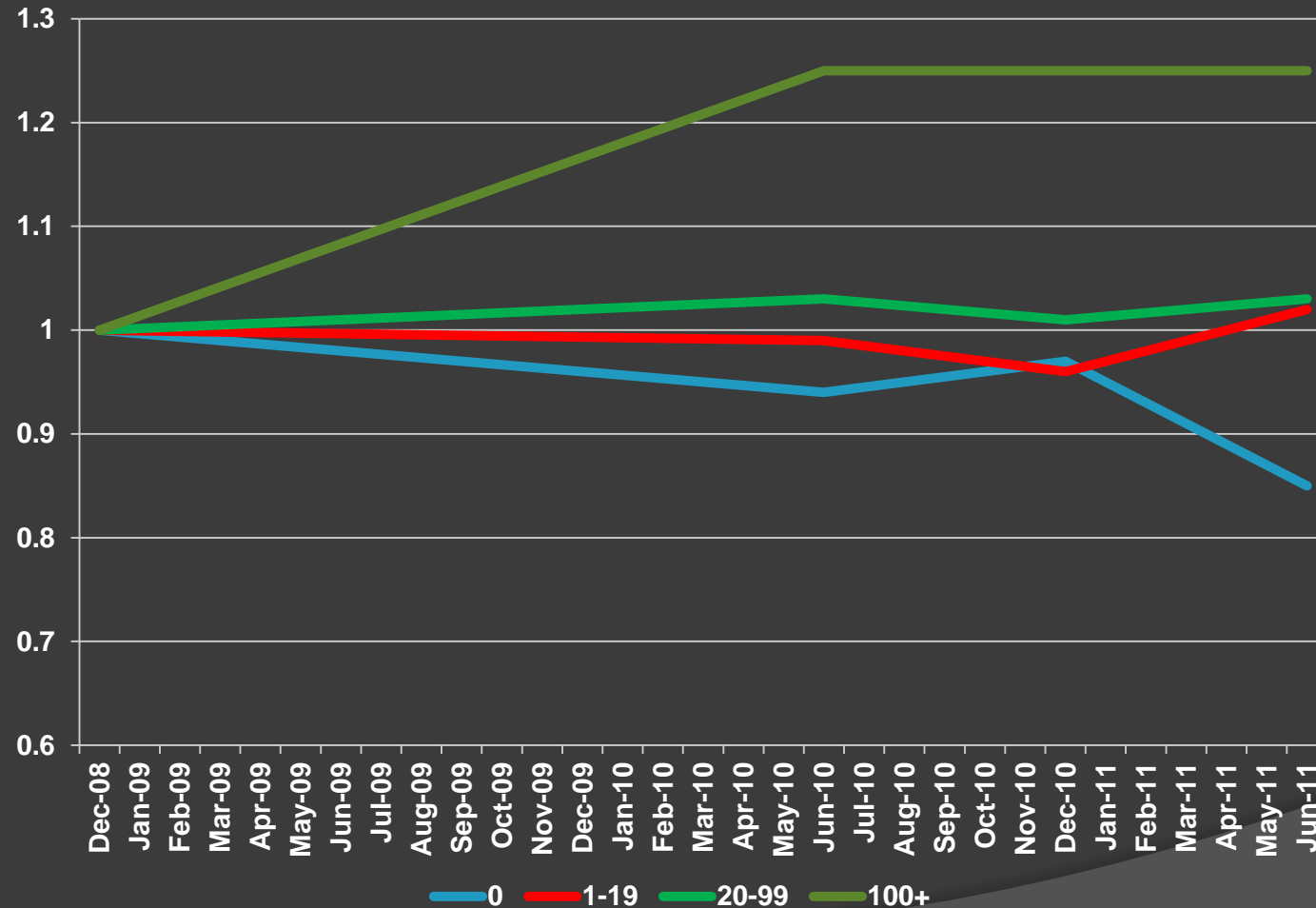


SIMCOE



Food services and drinking places, Simcoe,

Dec 08, June 10, Dec 10, June 11



Number of employees

"0" employees

201

1-19 employees

333

20-99 employees

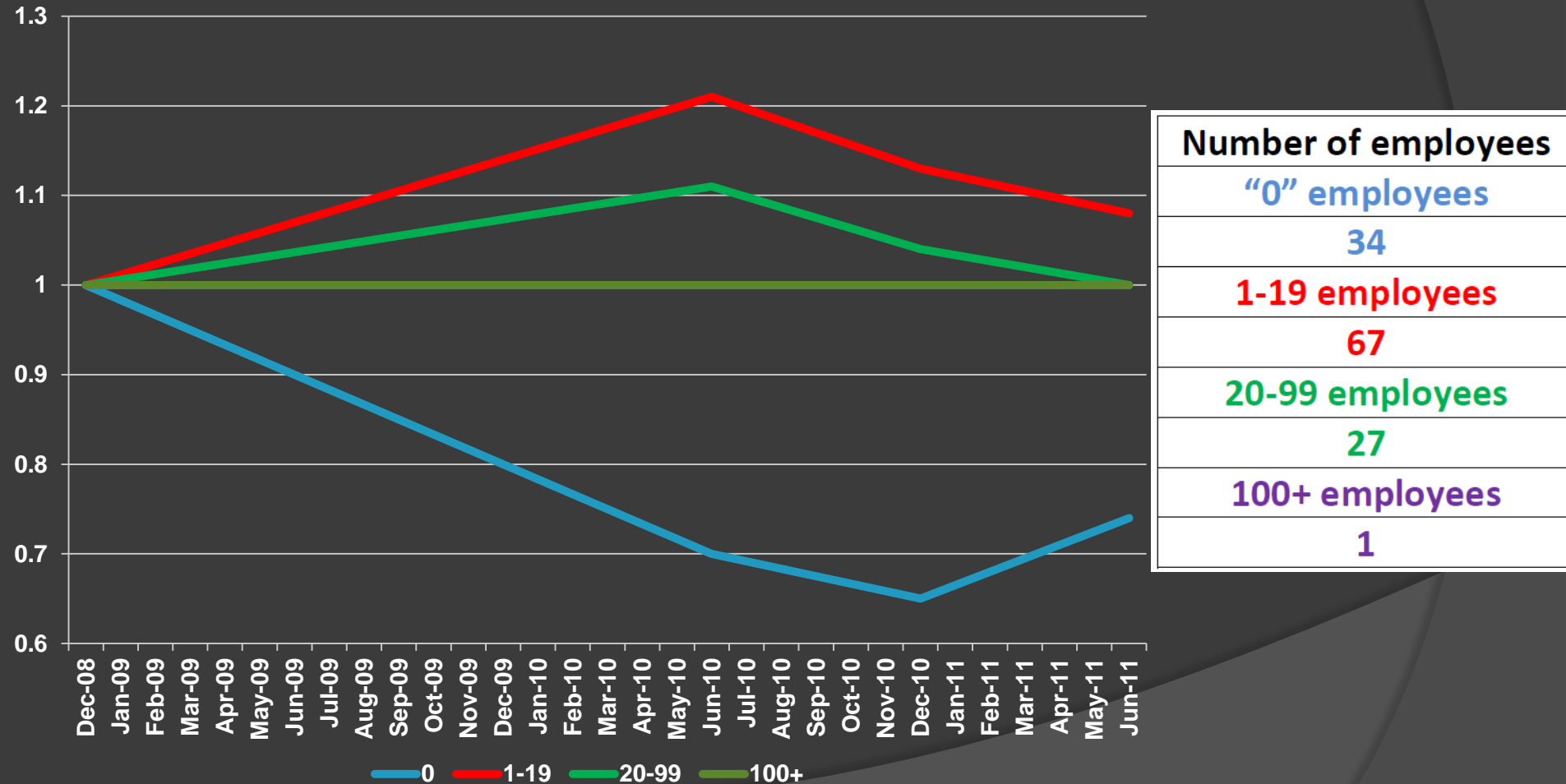
180

100+ employees

15

Food services and drinking places, Muskoka,

Dec 08, June 10, Dec 10, June 11

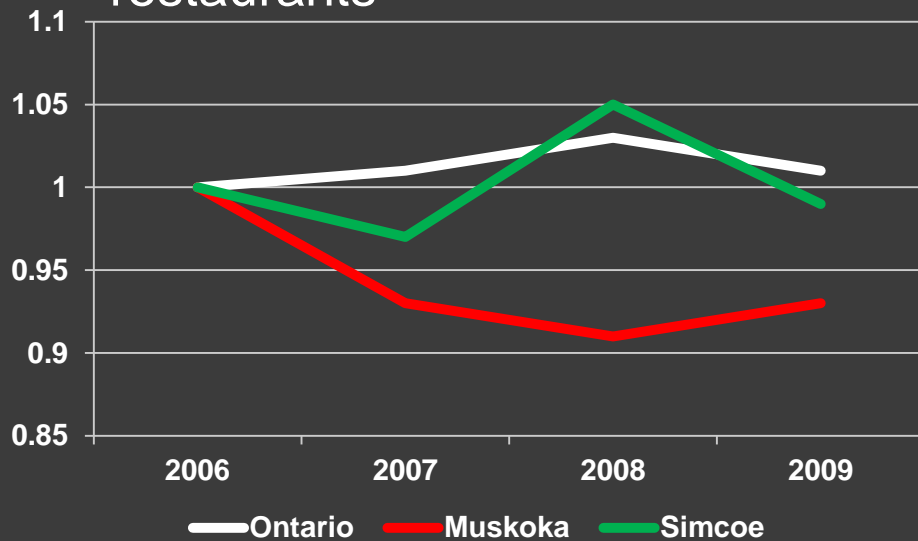


Food services

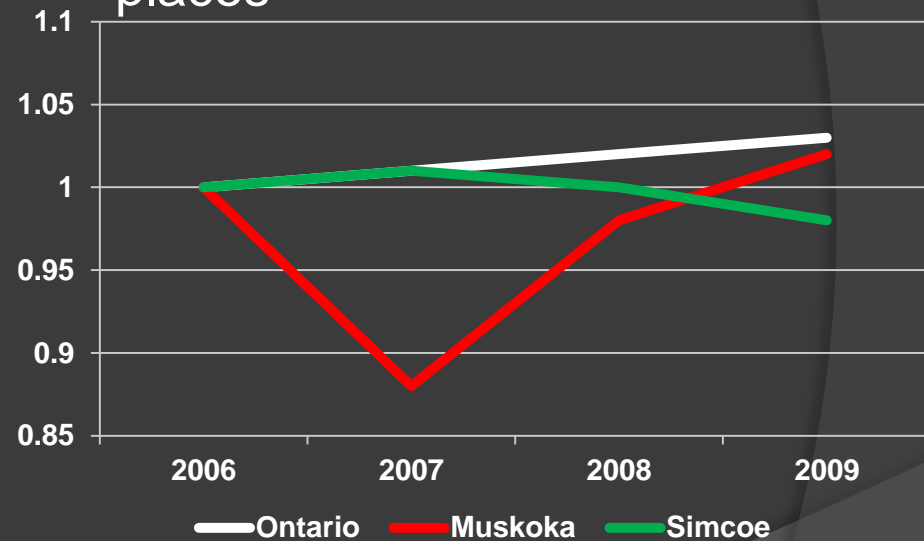
Ontario, Muskoka, Simcoe

2006-2009

Full-service
restaurants



Limited-service eating
places



IMPLICATIONS FOR A TOURISM LABOUR MARKET STRATEGY

Recap of data

- ⦿ Larger proportion of entry-level occupations
- ⦿ Larger proportion of part-time jobs
- ⦿ Larger proportion of jobs held by women
- ⦿ Larger proportion of jobs held by youth
- ⦿ Larger proportion of seasonal jobs
- ⦿ Lower wage rates compared to other industries for the same category of occupations

Resulting labour market issues

- High turnover
- As a result, employee recruitment and retention are significant issues
- Growing importance of the customer experience creates greater need for quality staff
- Concern about current and future workforce shortages
- Concern about lower levels of current skills and increasing need for higher skills

Some proposed labour market strategies

- ⦿ Focus on employee engagement
- ⦿ Promote career opportunities
- ⦿ Link to broader tourism strategies
- ⦿ Measure performance

Employee engagement

- ⦿ Feeling your work makes a difference
- ⦿ Positive working relationships
- ⦿ Effective internal employee communications
- ⦿ Offering recognition and rewards
- ⦿ Being clear about job expectations
- ⦿ Offering career advancement opportunities
- ⦿ Being part of something bigger
- ⦿ Respect for work-life balance

What is a career ladder approach?

An intentional series of connected education and training programs, and support services, that allow individuals to access employment

And that allow workers (new and incumbent) to advance over time to successively higher levels of education and employment

Elements of career ladder approach

- “Road maps” showing connections between jobs & training
- Pre-employment programs matching entry-level skill needs
- “Bridge programs” for educationally disadvantaged
- Access to education & training while working
(Learning-friendly workplaces and work-friendly education)
- Base training on next level job requirements
- Emphasis on “learning by doing,” portability of credits, easy to enter and exit education
- If necessary, (re)introduce intermediate career steps
- Provide “wrap-around” necessary support services
(Child care, VESL, counselling, access to financial assistance)
- Extensive reliance on data & analysis (Cons in education

HEALTH PROJECT

Schema for Proposed Career Ladders in Health Pilot Project, Downtown Toronto (I)

Some of the partners:

George Brown College

Bridgepoint

VHA Home Care

St. Michael's Hospital

Mt. Sinai Hospital

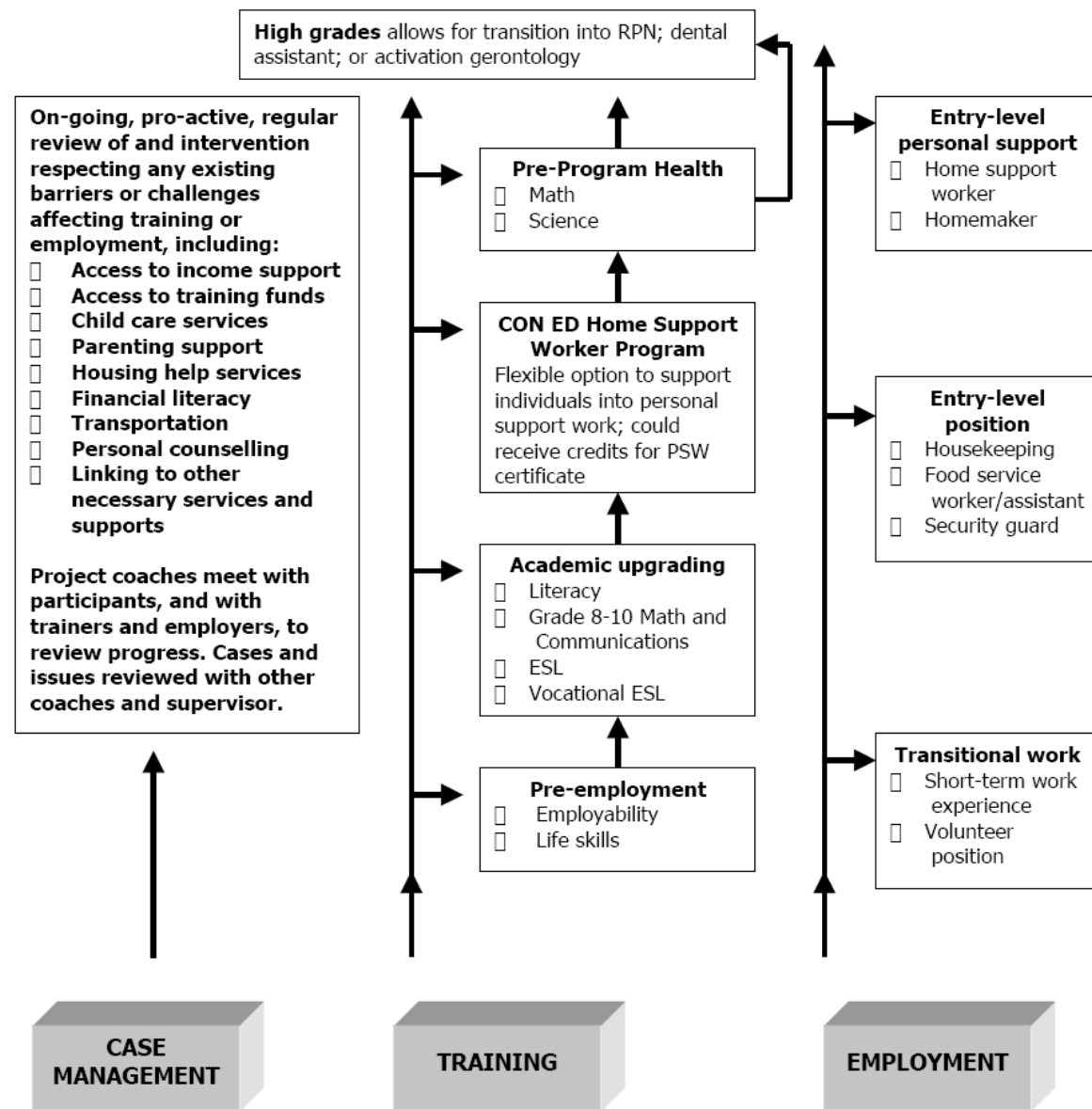
Sherbourne Health Centre

Downtown East Community Development Collective

CUPE union

SEIU union

TIER I: ACCESSING EMPLOYMENT IN THE HEALTH CARE SECTOR – PERSONAL AND PATIENT CARE



Schema for Proposed Career Ladders in Health Pilot Project, Downtown Toronto (II)

Some of the partners:

George Brown College

Bridgepoint

VHA Home Care

St. Michael's Hospital

Mt. Sinai Hospital

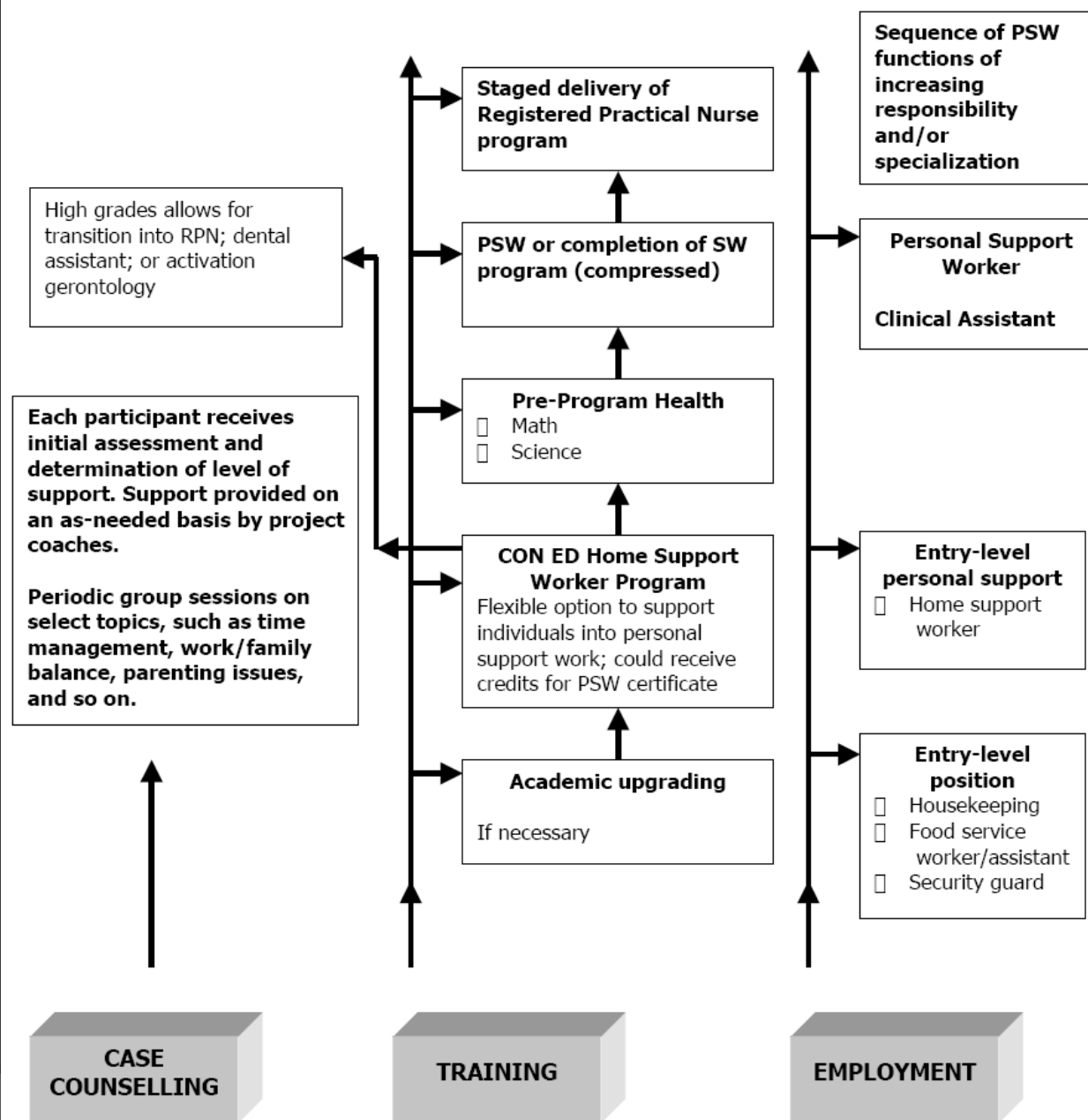
Sherbourne Health Centre

Downtown East Community Development Collective

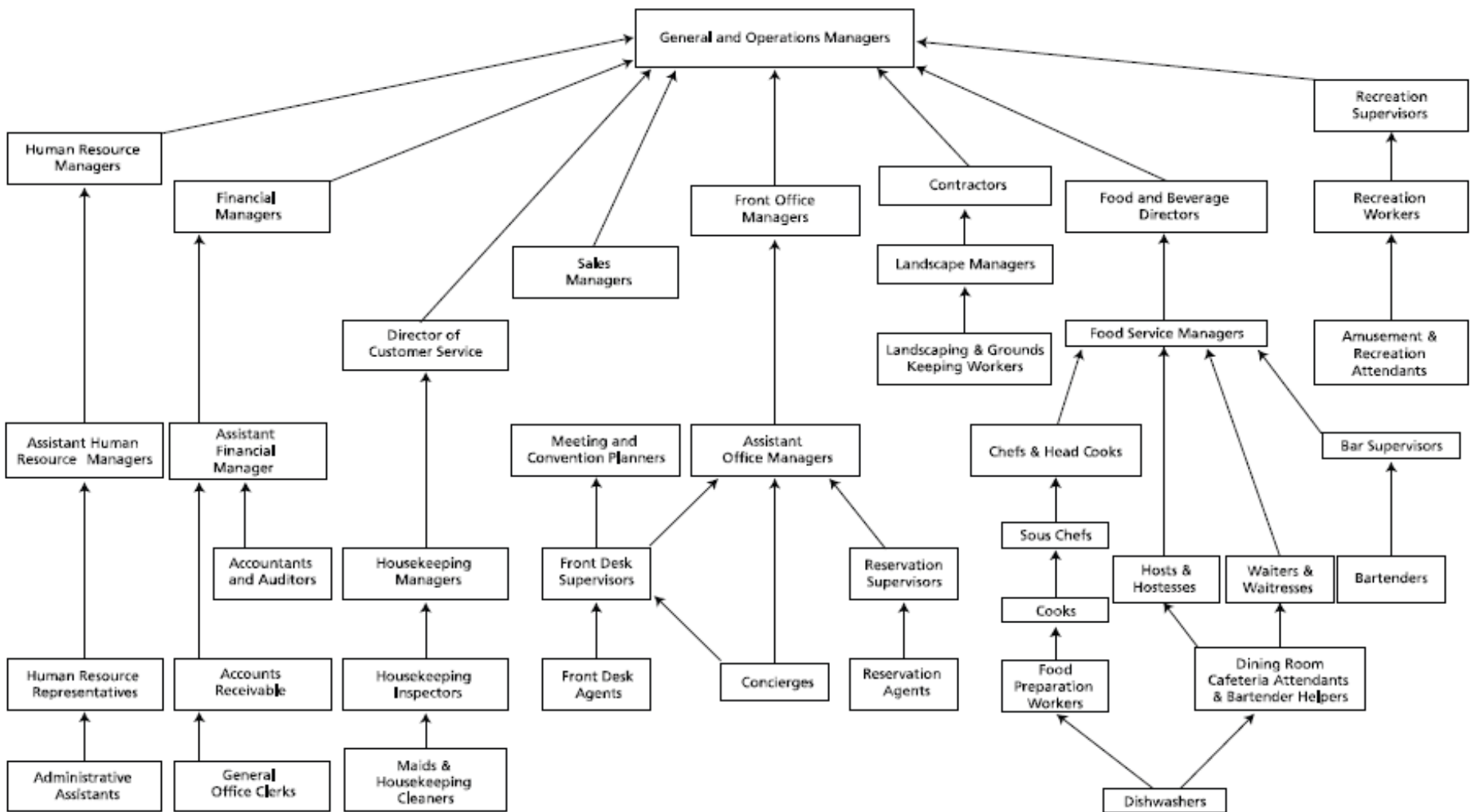
CUPE union

SEIU union

TIER II: CAREER ADVANCEMENT IN THE HEALTH CARE SECTOR – PERSONAL AND PATIENT CARE

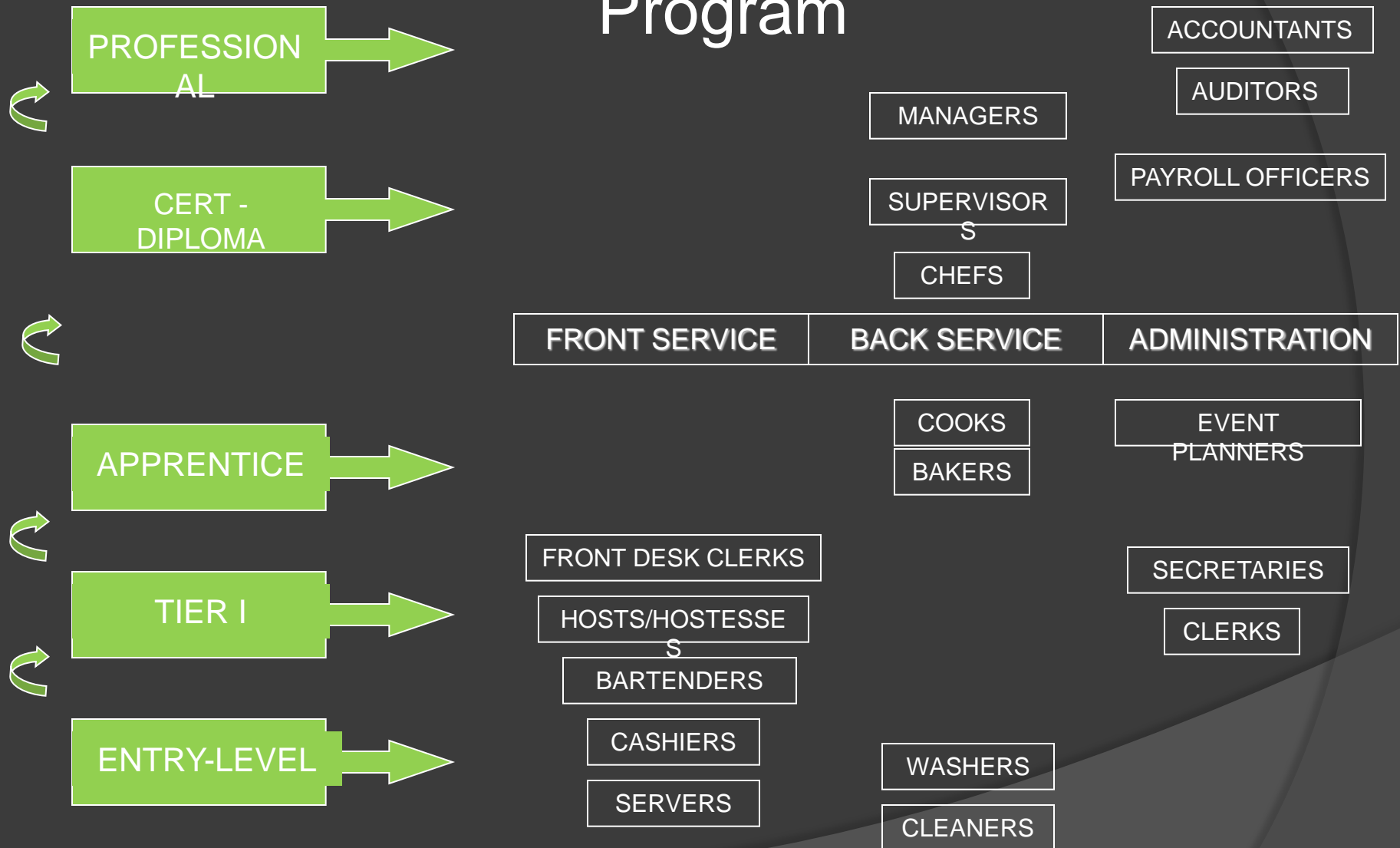


Hospitality Career Ladder⁶



⁶ The hospitality career ladder flow chart only shows potential career paths for individuals in three of the six hospitality industry segments: over-night accommodations, food and beverage services, and hospitality support services. The remaining three hospitality industry segments – recreation, entertainment and amusement, and hospitality transportation - offer career development opportunities that are specific to individual employers, but have no generalized career ladders

Modified Hospitality Entry & Career Lattice Program



What's next?

- ⦿ This study was started in early 2011 to begin exploration of tourism labour market issues in Simcoe and Muskoka
- ⦿ Since that time, the RTOs have begun focusing more on workforce development, including meetings with workforce development boards
- ⦿ Purpose of this study has been to bring some attention to existing data and to put some suggestions on the table

Discussion

- ⦿ Does the data reflect your reality? How does it?
- ⦿ What other data would you like?
- ⦿ What other burning workforce issues are front of mind for you?
- ⦿ Where do you see opportunities in your industry?
- ⦿ If you could change one thing in your industry what do you see as adding value?