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# **THE TOURISM INDUSTRY AND TOURISM WORKFORCE IN PARRY SOUND**

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## EXECUTIVE SUMMARY

The purpose of this document is to provide an overview of the tourism labour market in Parry Sound, as the first step toward exploring possible workforce development initiatives.

The tourism workforce takes its shape from the local businesses that respond to the demand generated by tourism activities. Thus, a starting point for understanding the tourism workforce is the shape of tourism demand. In the case of Parry Sound, the tourism business is highly seasonal, with a large peak of visitors in the third quarter (July, August and September). In comparison to its resident population, Parry Sound experiences a considerable influx of visitors, the vast majority of whom are overnight visitors, of whom more than half stay in private cottages. Among accommodation businesses, camping and recreational vehicle facilities, as well as commercial cabins and cottages, rank highest for overnight accommodation stays. By far the most prominent visitor activities are boating and fishing.

The tourism industry is defined by a number of sectors: arts, entertainment and recreation; accommodation services; and food and beverage services. The number of establishments in the tourism industry dropped across all three of these categories between 2006 and 2010, and since that time has remained steady.

A larger proportion of Parry Sound residents are employed in the tourism sector compared to the figures for Ontario as a whole. Many are employed in entry-level jobs, though proportionately less than are found in other parts of the province. Nevertheless, food and beverage servers and food counter attendants are the two largest occupations among tourism sector jobs in Parry Sound. On the other hand, the third largest occupation is accommodation service manager, reflecting the significant number of small operators in the local accommodation sector.

As is the case elsewhere, females make up a larger proportion of the tourism workforce (almost 60%), and are especially prominent in the food services sector. Gender patterns prevail in the many tourism occupations across the province, and in Parry Sound jobs such as light duty cleaners, cashiers and food counter attendants are over 80% filled by women.

Youth make up a smaller proportion of the overall Parry Sound workforce compared to Ontario figures, and similarly youth make up a smaller proportion of the local tourism workforce. That being said, a greater percentage of youth work in the tourism sector in Parry Sound than is the case for Muskoka or the rest of Ontario. For example, among employed Parry Sound females aged 15 to 19 years old, over half (52%) work in the tourism sector.

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While the overall educational attainment level of all workers in Parry Sound is somewhat below that found in the rest of the province, that is not the case for workers in the tourism sector, where their educational attainment levels are essentially the same as that found among workers in Ontario minus Toronto.

When comparing employment income in the tourism sector, in most instances the figures for Parry Sound are lower than those found in Muskoka, Toronto and Ontario minus Toronto.

The rate of full-time, full-year employment in the tourism sector is somewhat higher for Parry Sound males when compared to elsewhere, while that for females is higher than that for Ontario minus Toronto.

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## TOURISM ACTIVITY

To understand the contours and dynamics of the tourism labour force, one first needs to start with tourism activity: how many tourists are there, when do they visit, what do they do, where do they stay, and so on. These characteristics of tourism activity shape the demand for tourism services, which in turn determine the need for workers in the tourism industry.

### Tourist visits

The first relevant statistic is the number of person-visits to the area. Table 1 presents the total number of person-visits for Parry Sound and, for comparison's sake, the numbers for Muskoka.<sup>1</sup>

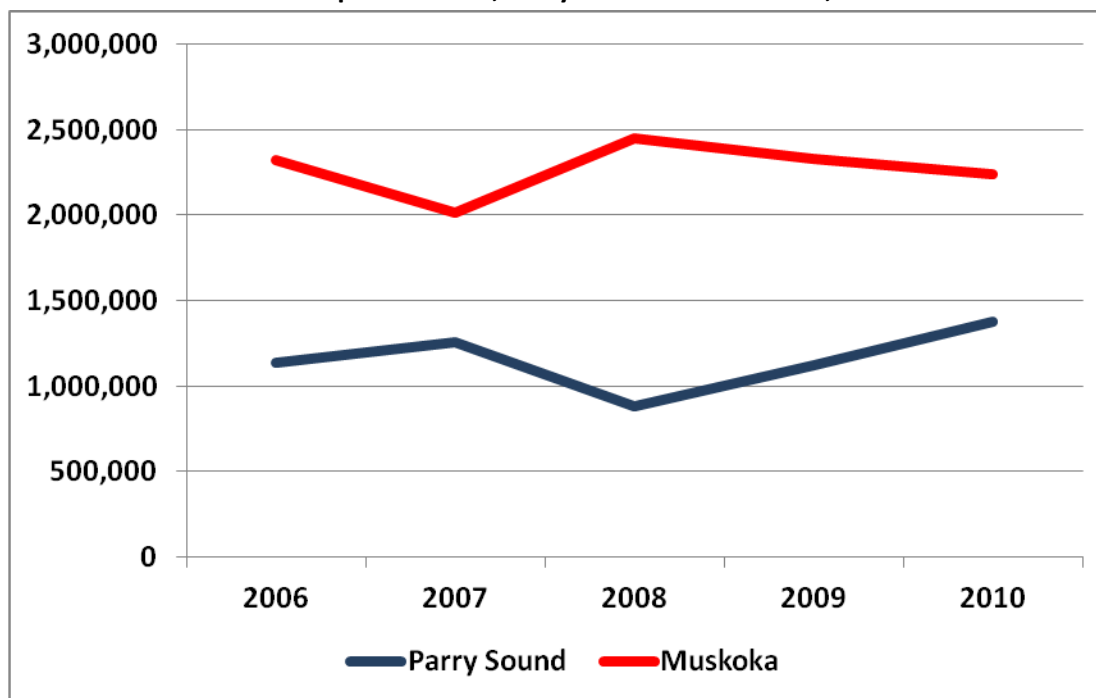
Table 1: Annual number of person-visits, Parry Sound and Muskoka, 2006-2010						
	2006	2007	2008	2009	2010	Average
Parry Sound	1,133,783	1,260,252	879,088	1,122,711	1,378,954	1,154,958
Muskoka	2,319,948	2,016,949	2,447,727	2,329,898	2,240,073	2,270,919

Chart 1 plots this data, which suggests that the number of visits to Parry Sound and Muskoka have stayed within a defined range over the last few years, with Muskoka typically attracting around twice as many visits as Parry Sound.

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<sup>1</sup> This data comes from the Ontario Ministry of Tourism and Culture, which compiles data from Statistics Canada's *Travel Survey of Residents of Canada* and the *International Travel Survey*. Being a survey, the data is an extrapolation relying on a sample of the total population. In the case of Parry Sound, that sample numbers on average around 370 individuals each year. In most instances, data for several years will be provided, to smooth out any irregularities caused by a smaller sample size. The most current numbers presently available for this data are for the year 2010.

**Chart 1: Annual number of person-visits, Parry Sound and Muskoka, 2006-2010**



Both Parry Sound and Muskoka punch above their weight in the tourism sector: while both areas are home to less than half of one per cent of the Ontario population, they each draw more than their share of visits by non-residents (a person-visit is one visit by someone travelling more than 40 kilometres).

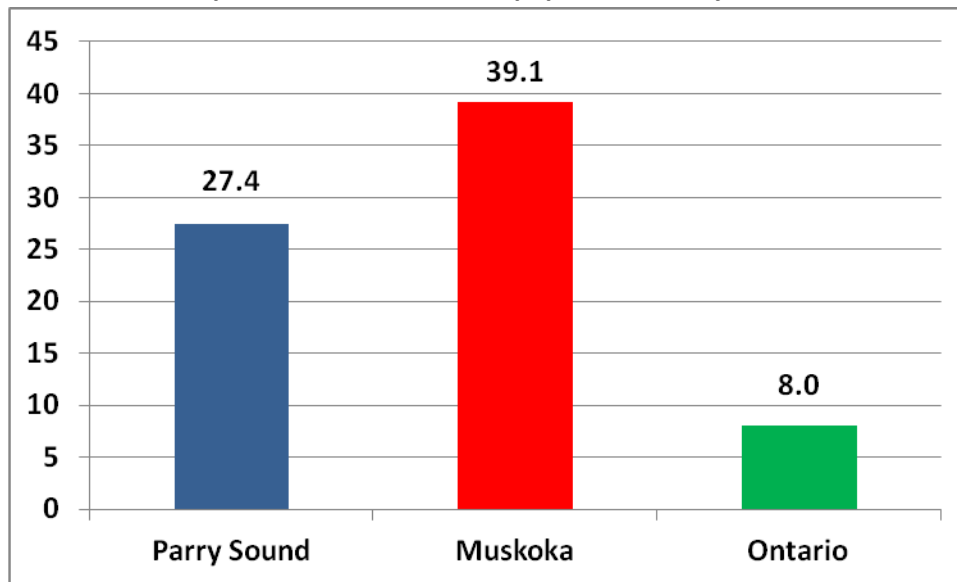
**Table 2: Population and person-visit numbers and ratios, Parry Sound and Muskoka<sup>2</sup>**

	Parry Sound	Muskoka
<b>Population</b>	42,162	58,047
<b>% of Ontario</b>	0.33%	0.45%
<b>Person-visits</b>	1,154,958	2,270,919
<b>% of Ontario</b>	1.12%	2.21%

While Muskoka has on average double the number of person-visits per year as Parry Sound, it also has a somewhat larger population. When viewed as a ratio of person-visits to resident population, Muskoka's advantage is tempered somewhat. Nevertheless, both areas draw far more visits per population than the average for Ontario.

<sup>2</sup> The population numbers are from Statistics Canada's 2011 Census; the person-visit numbers are the average figure from 2006 to 2010 for each destination, from Statistics Canada's *Travel Survey of Residents of Canada* and the *International Travel Survey*.

**Chart 2: Ratio of person-visits to resident population, Parry Sound, Muskoka and Ontario**



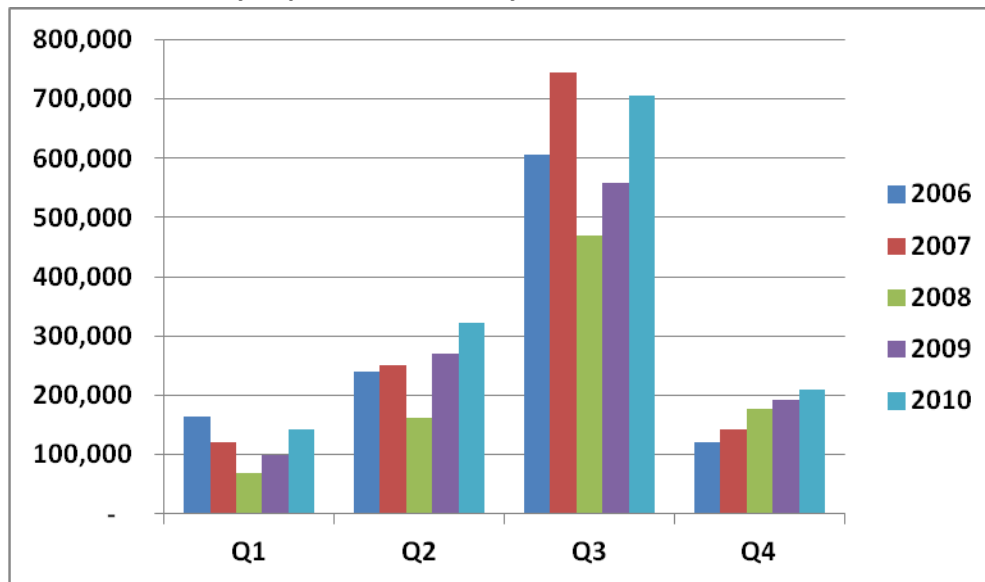
### Seasonality of person-visits

The level of tourism activity is often related to the seasons, with some regions attracting visitors during the summer while others are prominent winter destinations. That tendency is noticeably pronounced in Parry Sound.

Chart 3 illustrates the numbers for Parry Sound. Slightly over half of all visitors come during the third quarter of the year (July, August and September).

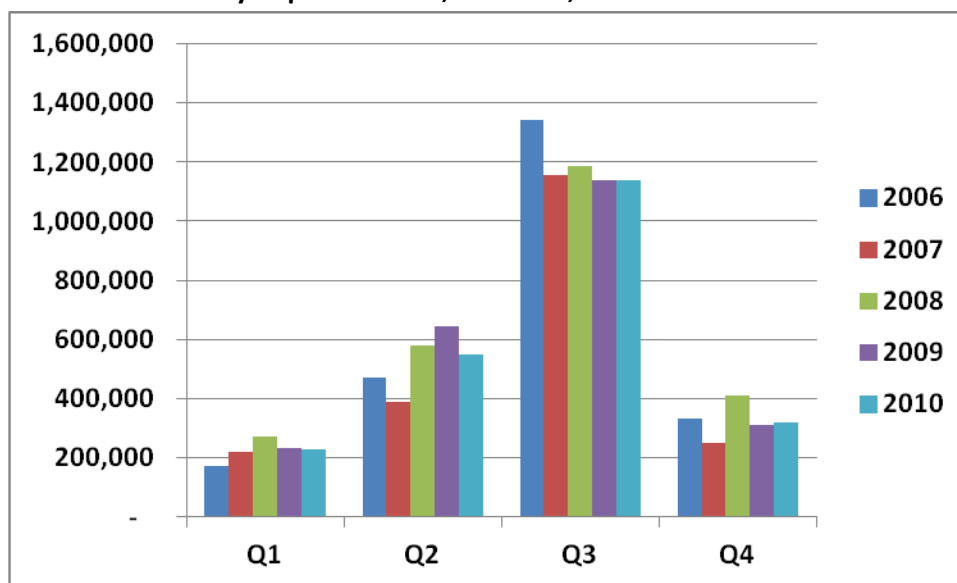
Q1	First quarter	January, February, March
Q2	Second quarter	April, May, June
Q3	Third quarter	July, August, September
Q4	Fourth quarter	October, November, December

**Chart 3: Seasonality of person-visits, Parry Sound, 2006-2010**



The seasonal pattern of visits almost exactly replicates that found in Muskoka.

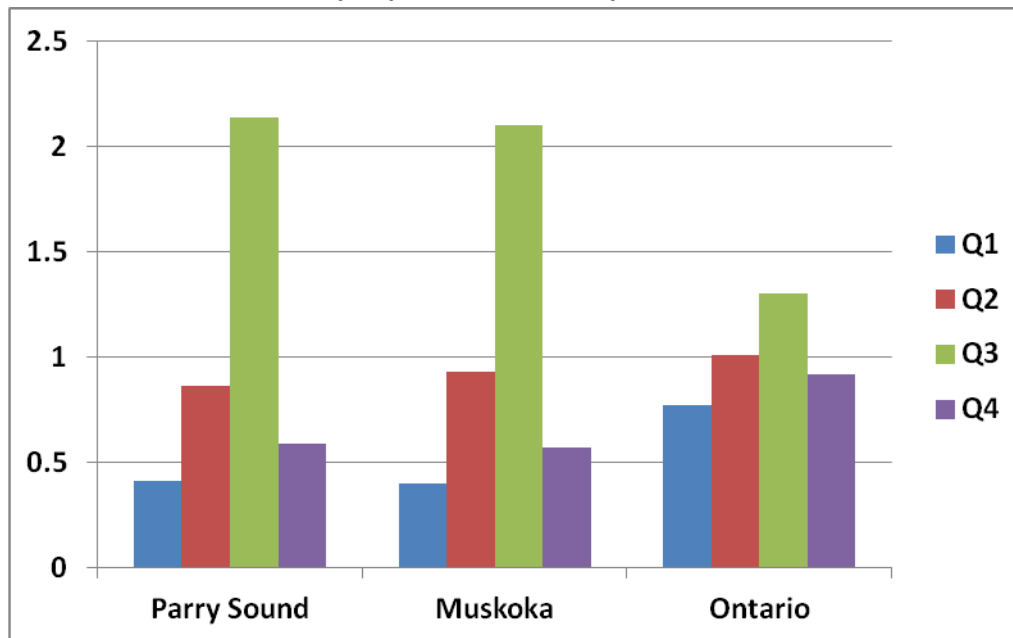
**Chart 4: Seasonality of person-visits, Muskoka, 2006-2010**



The degree of seasonality in the person-visits can be expressed as a ratio, where 1.0 equals the average number of visitors per quarter, and each quarter's numbers is compared to the average and expressed in relation to "1". Chart 5 compares this degree of seasonality in Parry Sound and Muskoka to the Ontario average.



**Chart 5: Ratio of seasonality of person-visits, Parry Sound, Muskoka and Ontario, 2006-2010**



The degree of seasonality has a significant impact in terms of the tourism workforce. Great variations in the number of person-visits from one season to the next requires a greater reliance on seasonal workers. Workers looking for year-round work will be less likely to be attracted to these seasonal jobs, except perhaps as a stop-gap when unemployed. Each year employers need to recruit a new batch of workers, who may or may not return the following season. These workers may have less invested in their work because it is short-term, and employers may be less inclined to provide much training, knowing these employees will likely soon be gone.

### **Visitor activities**

Tourist visitors seek out or find different activities depending on where they go. Table 3 identifies the activities that visitors engage in when travelling to Parry Sound, Muskoka and Ontario.

**Table 3: Distribution of activities by person-visits, Parry Sound, Muskoka and Ontario, average for 2007-2010**

	<b>Parry Sound</b>	<b>Muskoka</b>	<b>Ontario</b>
<b>Festivals/Fairs</b>	1.4%	2.4%	3.6%
<b>Cultural Performances</b>	1.1%	2.1%	6.9%
<b>Museums/Art Galleries</b>	1.7%	2.8%	5.7%
<b>Zoos/Aquariums/Botanical Gardens</b>	0.6%	0.9%	2.1%
<b>Sports Events</b>	1.3%	1.1%	5.2%
<b>Casinos</b>	0.5%	0.6%	4.7%
<b>Theme Parks</b>	0.6%	1.5%	2.4%
<b>National/Provincial Nature Parks</b>	6.2%	6.3%	7.9%
<b>Historic Sites</b>	2.8%	3.7%	6.7%
<b>Any Outdoor/Sports Activity</b>	38.0%	38.1%	32.4%
<b>Boating</b>	23.1%	23.0%	9.7%
<b>Golfing</b>	1.9%	4.5%	3.4%
<b>Fishing</b>	17.6%	10.2%	6.8%
<b>Hunting</b>	1.1%	0.4%	0.6%

Cells highlighted in **green** denote activities that have a noticeably higher level of participation across these three areas.

Visitors to Parry Sound are especially likely to engage in boating or fishing activities, as is the case for Muskoka as well. Golf also attracts visitors to Muskoka. Both Parry Sound and Muskoka score much lower on the proportion of visitors who engage in other than recreational outdoor activities, such as attending festivals, cultural performances or museums, which score higher in the data for Ontario as a whole.

### Visitor accommodations

Accommodations are used by visitors who stay one night or longer, so the first relevant piece of data is the proportion of overnight visitors compared to same-day visitors.

**Table 4: Percentage of same-day and overnight visitors, and average length of stay of overnight visitors, Parry Sound, Muskoka and Ontario, 2006-2010**

	<b>Parry Sound</b>	<b>Muskoka</b>	<b>Ontario</b>
<b>Same day visitors</b>	19.8%	27.0%	58.6%
<b>Overnight visitors</b>	80.2%	73.0%	41.4%
<b>Average stay of overnight visitors</b>	3.3	3.2	3.2

A greater proportion of visitors to Parry Sound stay overnight, somewhat more than is the case for Muskoka and much more than is the case for Ontario. However, where those overnight visitors stay has a great bearing on the size and shape of the accommodation services sector. Table 5 shows the percentage breakdown of overnight stays by accommodation type spent by overnight visitors.<sup>3</sup>

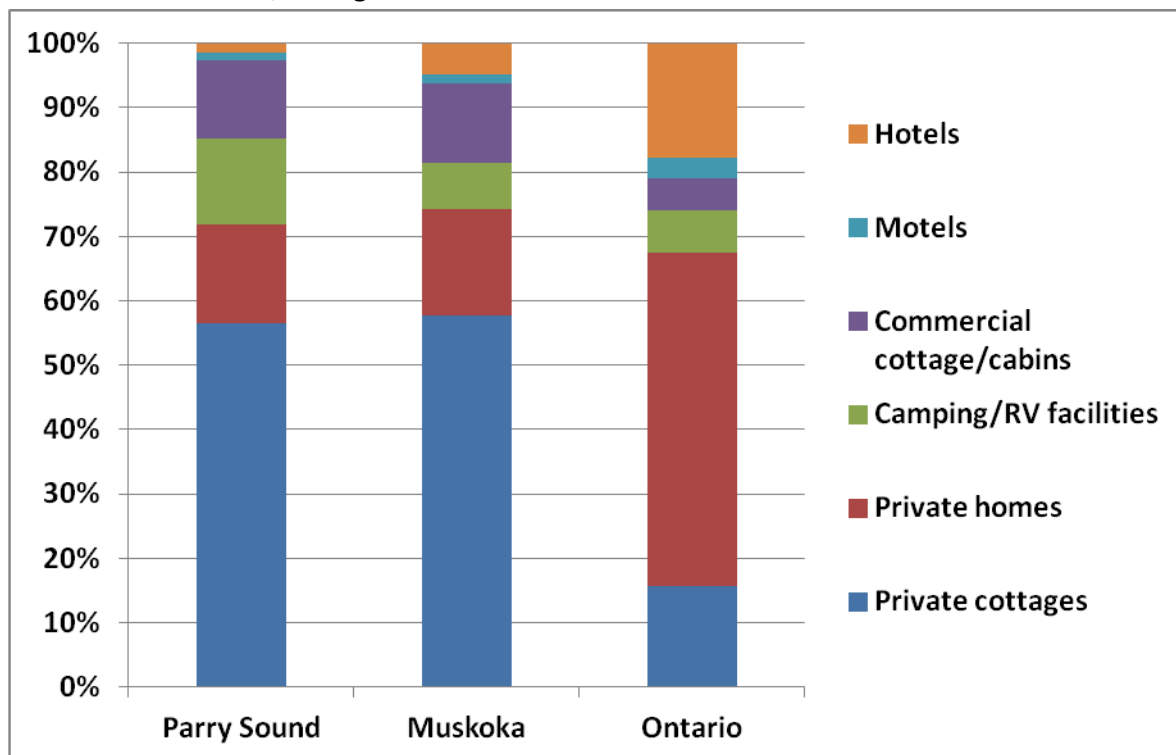
<b>Table 5: Percentage of overnight stays by accommodation type by overnight visitors, Parry Sound, Muskoka and Ontario, average for 2006-2010</b>			
	<b>Parry Sound</b>	<b>Muskoka</b>	<b>Ontario</b>
<b>Hotels</b>	1.3%	4.3%	16.2%
<b>Motels</b>	1.2%	1.3%	3.0%
<b>Commercial cottages/cabins</b>	11.6%	11.3%	4.5%
<b>Camping/RV facilities</b>	12.5%	6.5%	6.0%
<b>Private homes</b>	14.7%	14.8%	47.3%
<b>Private cottages</b>	53.5%	52.3%	14.3%

For all three areas profiled, the vast majority of visitors stay in a private dwelling, however there is a significant difference between Parry Sound and Muskoka on the one hand and Ontario on the other. Visitors to Parry Sound or Muskoka are far more likely to stay at someone's private cottage as opposed to their private home. Among commercial facilities, there is also a stark divide: in Parry Sound (and to a slightly lesser extent in Muskoka), visitors are far more likely to stay in commercial cottages or cabins, or in camping or recreational vehicle (RV) facilities, and far less likely to stay in hotels or motels. This comparison is graphically contrasted in Chart 6.

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<sup>3</sup> The table does not show all accommodation categories. For example, bed & breakfast operations are not included, because in Parry Sound they account for about 0.1% of all visitor overnight accommodations, and less than 1% of all nights spent in a roofed commercial establishment.

**Chart 6: Percentage of overnight stays by accommodation type by overnight visitors, Parry Sound, Muskoka and Ontario, average for 2006-2010**



Consider, then, the dynamics of these various characteristics of the tourist visitor and how it plays out in each locale: Parry Sound has fewer visitors compared to Muskoka, yet a larger proportion of them stay overnight. However, their choice of accommodation tends towards private cottages, camping and RV facilities, and commercial cottages or cabins. The following numbers reflect the level of activity in each accommodation category, which spells the level of business for the commercial facilities.

**Table 6: Number of overnight stays by accommodation type by overnight visitors, Parry Sound and Muskoka, average for 2006-2010**

	Parry Sound	Muskoka
<b>Hotels</b>	40,869	224,406
<b>Motels</b>	35,361	68,435
<b>Commercial cottages/cabins</b>	354,921	595,734
<b>Camping/RV facilities</b>	384,339	344,398
<b>Private homes</b>	450,660	779,227
<b>Private cottages</b>	1,642,523	2,759,612

Parry Sound has demand for camping and RV facilities and for commercial cottages or cabins that is roughly in the same range as Muskoka. Indeed, Parry Sound has slightly more overnight visitors staying in camping and RV facilities than does Muskoka, but only around a quarter of the number of hotel overnight stays.

## TOURISM ESTABLISHMENTS

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

The number of these establishments is tracked via Statistics Canada's *Canadian Business Patterns* data, which counts all business establishments twice a year (in June and December).<sup>4</sup> This report relies on two sets of *Canadian Business Patterns* data, a detailed count that drills down into industry subsectors, from 2006 and 2010, and more recent data but not nearly as detailed, for four reporting periods.<sup>5</sup> The first data set will be used to describe what kinds of businesses make up the tourism sector locally, and the second data set will be used to highlight recent trends in terms of the number of tourism businesses.

### Mix of tourism establishments, trends 2006-2010

Industries are catalogued according to the North American Industry Classification System (NAICS), which defines broad industry categories, which are further subdivided for more detailed industry distinctions. The highest level categories are identified by two digits, and for the tourism sector the most important are:

71	Arts, Entertainment and Recreation
72	Accommodation and Food Services

These industry sectors include further subsectors, at the 3-, 4- and 6-digit levels. The following list illustrates the level of detail for one portion of the Accommodation and Food Services industry:

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

<sup>5</sup> The first data set is available from the Regional Tourism Profiles page of the website for the Ontario Ministry of Tourism, Culture and Sport. The second data set is from the Labour Market Group, the workforce planning board for the Districts of Nipissing and Parry Sound, which purchases this data to track labour market trends.

72	Accommodation and Food Services
721	Accommodation Services
7211	Traveller Accommodation
721111	Hotels
721112	Motor Hotels
	And so on...
7212	RV (Recreational Vehicle) Parks and Recreational Camps
721211	RV Parks and Campgrounds
721212	Hunting and Fishing Camps
	And so on...
722	Food Services and Drinking Places

Accommodation services. The following table highlights the number of establishments in the Accommodation services industry over the period 2006 to 2010.<sup>6</sup>

<b>Table 7: Number of establishments by industry subsector, Accommodation services industry, Parry Sound, 2006-2010</b>					
	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
<b>Hotels</b>	15	13	13	11	9
<b>Motor Hotels</b>	2	1	1	0	0
<b>Resorts</b>	21	20	20	20	14
<b>Motels</b>	13	11	9	11	9
<b>Casino Hotels</b>	0	0	0	0	0
<b>Bed and Breakfast</b>	3	2	4	3	2
<b>Housekeeping Cottages and Cabins</b>	39	34	36	36	27
<b>All Other Traveller Accommodation</b>	0	1	3	6	7
<b>RV (Recreational Vehicle) Parks and Campgrounds</b>	23	22	19	19	15
<b>Hunting and Fishing Camps</b>	20	12	11	11	9
<b>Recreational (except Hunting &amp; Fishing) &amp; Vacation Camps</b>	18	17	15	11	11
<b>TOTAL ACCOMMODATION</b>	154	133	131	128	103

Over this period, the number of establishments fell considerably, from 154 to 103. The drop in numbers was distributed fairly evenly across all the categories. This is in sharp contrast with the trends in

<sup>6</sup> A Hotel typically is a multi-storey structure that provides guest rooms accessible from the interior only, as well as various other amenities and services. A Motor Hotel is more often a low-rise structure, also providing guest rooms accessible from the interior only, with ample parking but fewer other services and amenities. A Motel is best characterized by exterior access to rooms, ample parking, and few other services and amenities.

Muskoka where the numbers stayed much the same, except for a slight increase in the number of hotels and a drop in the number of housekeeping cottages and cabins.

Examining this same period in terms of the size of establishments, one can see that the drop in numbers in Parry Sound was also distributed across all firm sizes, with the exception of firms with 100 or more employees, which rose from none in 2006 to two in 2010 (both of which were in the Recreation [except Hunting and Fishing] and Vacation Camps subsector).

**Table 8: Number of establishments by number of employees, Accommodation services industry, Parry Sound, 2006-2010**

	No employees <sup>7</sup>	1-19 employees	20-49 employees	50-99 employees	100+ employees	TOTAL
<b>2006</b>	77	69	5	3	0	154
<b>2010</b>	57	41	3	0	2	103
<b>Difference</b>	-20	-28	-2	-3	2	-51

As can be seen from Table 8, tourism establishments in Parry Sound are by far made up of small operators, those with less than 20 employees. This category also experienced a large drop in numbers (minus 20 in the no employees category, minus 28 in the 1-19 employees category), although in proportionate terms, the largest drops occurring in the 50-99 employees category (minus 100%) and the 20-49 employees category (40% drop). However, some of the drop in the 50-99 category may be reflected in the increase from “0” to “2” in the 100 or more employees category (that is, two establishments grew in size).

Table 9 shows the breakdown of establishments in the Accommodation services sector in Parry Sound, by industry subsector and by number of employees, as it stood in 2010. It is worth emphasizing that there were only five establishments among 103 that had 20 or more employees: one hotel (20-49 employees); one resort (20-49 employees); and three recreational and vacation camps (one with 20-49 employees and two with 100 or more employees).

<sup>7</sup> The “no employees” category means no reported employees, and would include the self-employed, those establishments that rely on unpaid family members as staff, and those establishments that use contracted labour, who are not technically employees. This category also undercounts the number of self-employed, as it does not include unincorporated businesses that are owner-operated (have no payroll employees) and that earn less than \$30,000 in a given year.

**Table 9: Number of establishments by industry subsector and by number of employees, Accommodation services industry, Parry Sound, 2010**

	No employees	1-19 employees	20-49 employees	50-99 employees	100+ employees	TOTAL
<b>Hotels</b>	2	6	1	0	0	9
<b>Motor Hotels</b>	0	0	0	0	0	0
<b>Resorts</b>	9	4	1	0	0	14
<b>Motels</b>	3	6	0	0	0	9
<b>Casino Hotels</b>	0	0	0	0	0	0
<b>Bed and Breakfast</b>	2	0	0	0	0	2
<b>Housekeeping Cottages and Cabins</b>	16	11	0	0	0	27
<b>All Other Traveller Accommodation</b>	4	3	0	0	0	7
<b>RV (Recreational Vehicle) Parks and Campgrounds</b>	12	3	0	0	0	15
<b>Hunting and Fishing Camps</b>	6	3	0	0	0	9
<b>Recreational (except Hunting &amp; Fishing) &amp; Vacation Camps</b>	3	5	1	0	2	11
<b>TOTAL ACCOMMODATION</b>	57	41	3	0	2	103

Arts, entertainment and recreation. This industry sector is made up of 30 subsectors, of which only one third are present in Parry Sound, the three most prominent being marinas, golf courses and country clubs, and all other amusement and recreation industries (a grab-bag category that includes pool halls, curling rinks, fishing guide services, mini-putt, hunting and fishing clubs, and so on). Table 11 provides the breakdown for each subsector, including by number of employees, for 2010, while Table 12 compares the total numbers for Parry Sound with those for Muskoka (see the following two pages).

Almost all the change in the number of establishments in the arts, entertainment and recreation industry between 2006 and 2010 can be attributed to changes in the number of marinas, as the Table 10 attests.

**Table 10: Number of establishments, all Arts, Entertainment and Recreation industry and marinas, Parry Sound, 2006-2010**

	2006	2007	2008	2009	2010
<b>TOTAL – Arts, Entertainment and Recreation industry</b>	76	68	66	64	59
<b>Marinas</b>	37	32	29	27	23



**Table 11: Number of establishments by industry subsector and by number of employees, Arts, Entertainment and Recreation industry, Parry Sound, 2010**

	No employees	1-19 employees	20-49 employees	50-99 employees	100+ employees	TOTAL
All Other Amusement and Recreation Industries	4	4	0	1	0	9
All Other Gambling Industries	0	0	0	0	0	0
Amusement and Theme Parks	0	0	0	0	0	0
Amusement Arcades	0	0	0	0	0	0
Art Dealers	0	0	0	0	0	0
Bowling Centres	0	2	0	0	0	2
Casinos (except Casino Hotels)	0	0	0	0	0	0
Dance Companies	0	0	0	0	0	0
Festivals without Facilities	1	1	0	0	0	2
Fitness and Recreational Sports Centres	4	2	0	0	0	6
Golf Courses and Country Clubs	4	4	1	2	0	11
Historic and Heritage Sites	0	0	0	0	0	0
History and Science Museums	0	0	0	0	0	0
Horse Race Tracks	0	0	0	0	0	0
Live Theatres and Other Presenters with Facilities	0	0	0	0	0	0
Marinas	4	18	1	0	0	23
Motion Picture and Video Exhibition	0	1	0	0	0	1
Museums (except Art Museums and Galleries)	0	2	0	0	0	2
Musical Theatre and Opera Companies	0	0	0	0	0	0
Non-Commercial Art Museums and Galleries	0	0	0	0	0	0
Other Heritage Institutions	0	1	0	0	0	1
Other Performing Arts Companies	0	0	0	0	0	0
Other Spectator Sports	0	0	0	0	0	0
Performing Arts Promoters without Facilities	0	0	0	0	0	0
Skiing Facilities	0	0	0	0	0	0
Sports and other Presenters and without Facilities	0	0	0	0	0	0
Sports Stadiums and Other Presenters with Facilities	0	0	0	0	0	0
Sports Teams and Clubs	1	0	0	0	0	1
Theatre (except Musical) Companies	1	0	0	0	0	1
Zoos and Botanical Gardens	0	0	0	0	0	0
<b>TOTAL ARTS, ENTERTAINMENT AND RECREATION</b>	<b>19</b>	<b>35</b>	<b>2</b>	<b>3</b>	<b>0</b>	<b>59</b>

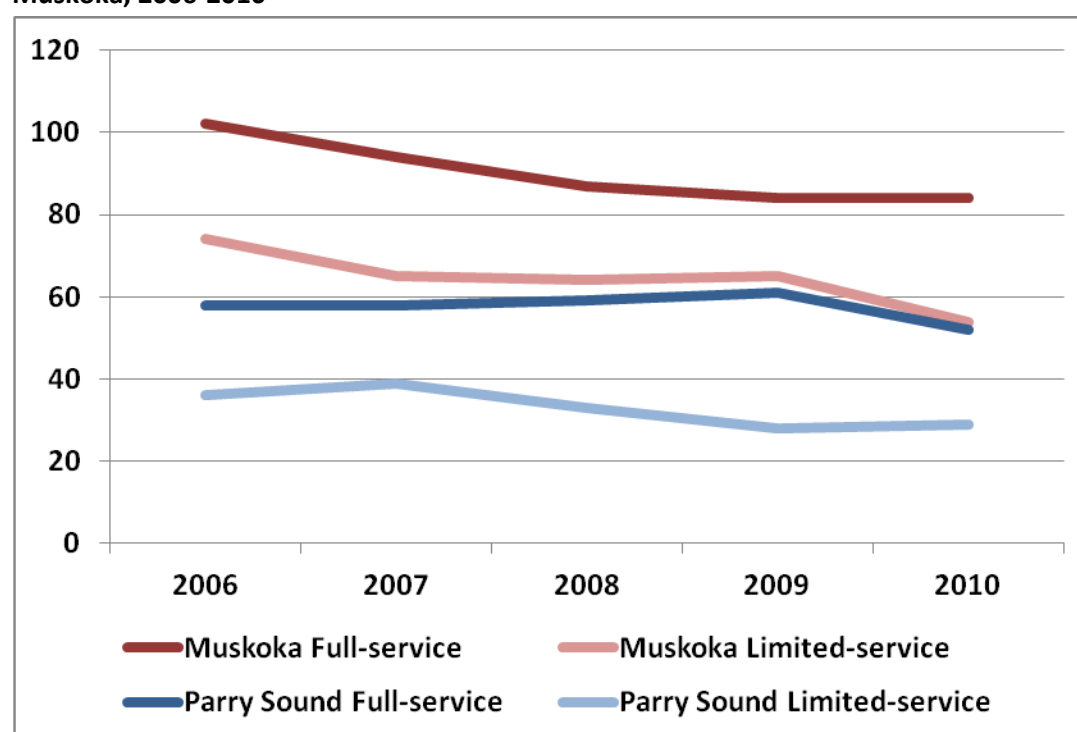
**Table 12: Number of establishments by industry subsector, Arts, Entertainment & Recreation industry, Parry Sound and Muskoka, 2010**

	Parry Sound	Muskoka
<b>All Other Amusement and Recreation Industries</b>	9	18
<b>All Other Gambling Industries</b>	0	0
<b>Amusement and Theme Parks</b>	0	3
<b>Amusement Arcades</b>	0	1
<b>Art Dealers</b>	0	6
<b>Bowling Centres</b>	2	1
<b>Casinos (except Casino Hotels)</b>	0	0
<b>Dance Companies</b>	0	0
<b>Festivals without Facilities</b>	2	0
<b>Fitness and Recreational Sports Centres</b>	6	16
<b>Golf Courses and Country Clubs</b>	11	16
<b>Historic and Heritage Sites</b>	0	0
<b>History and Science Museums</b>	0	0
<b>Horse Race Tracks</b>	0	0
<b>Live Theatres and Other Presenters with Facilities</b>	0	0
<b>Marinas</b>	23	35
<b>Motion Picture and Video Exhibition</b>	1	4
<b>Museums (except Art Museums and Galleries)</b>	2	1
<b>Musical Theatre and Opera Companies</b>	0	0
<b>Non-Commercial Art Museums and Galleries</b>	0	1
<b>Other Heritage Institutions</b>	1	2
<b>Other Performing Arts Companies</b>	0	1
<b>Other Spectator Sports</b>	0	0
<b>Performing Arts Promoters without Facilities</b>	0	3
<b>Skiing Facilities</b>	0	2
<b>Sports and other Presenters and without Facilities</b>	0	0
<b>Sports Stadiums and Other Presenters with Facilities</b>	0	0
<b>Sports Teams and Clubs</b>	1	4
<b>Theatre (except Musical) Companies</b>	1	2
<b>Zoos and Botanical Gardens</b>	0	1
<b>TOTAL ARTS, ENTERTAINMENT AND RECREATION</b>	59	117

Muskoka has twice as many arts, entertainment and recreation industry establishments as does Parry Sound. Moreover, Muskoka has more different *types* of such establishments: whereas Parry Sound had establishments in 10 of the 30 categories, Muskoka had 18 out of 30. Finally, Muskoka has notably more establishments with 20 or more employees: in 2010 Parry Sound had 5 such establishments, while Muskoka had 17.

Food services and drinking places. Food and drinking places catering to tourists<sup>8</sup> involve three types of establishments: full-service restaurants (servers taking orders and bringing food to your table); limited-service eating places (fast food counters); and drinking places serving alcohol beverages.<sup>9</sup>

**Chart 7: Number of full-service restaurants and limited service eating places, Parry Sound and Muskoka, 2006-2010**



Parry Sound – blue shades

Muskoka – red shades

<sup>8</sup> This subsector also includes Special Food Services, which encompasses Food Service Contractors, Caterers and Mobile Food Services. For the purposes of this report, these are not being considered as part of the tourism industry.

<sup>9</sup> These drinking places include bars, taverns and lounges, primarily engaged in serving alcoholic beverages. They may also provide limited food services. The number of these establishments reported in this data often appears low in comparison to what appear to be a lot more locations where one can sit down and have a drink—it is more likely the case that many of these establishments are licensed restaurants, such as pubs, which fall under the full-service restaurant category.

Parry Sound and Muskoka both have experienced similar trends as far as their food services sector is concerned: in both instances, full-service restaurants have outnumbered limited-service eating places, and between 2006 and 2010 both areas have seen a similar decline in both categories of food services establishments.

Both areas saw a steady decline in the number of drinking places serving alcohol beverages.

**Table 13: Number of drinking places serving alcohol beverages, Parry Sound and Muskoka, 2006-2010**

	2006	2007	2008	2009	2010
<b>Parry Sound</b>	11	9	8	6	4
<b>Muskoka</b>	8	6	4	5	3

In terms of size, a slightly higher proportion of establishments in the food services and drinking places subsector have more than 20 employees, compared to other employers in the tourism sector in Parry Sound.

**Table 14: Number of establishments by industry subsector and by number of employees, Food services and drinking places subsector, Parry Sound, 2010**

	No employees	1-19 employees	20-49 employees	50-99 employees	100+ employees	TOTAL
<b>Full-service restaurants</b>	10	34	7	1	0	52
<b>Limited-service eating places</b>	4	19	6	0	0	29
<b>Drinking places serving alcohol beverages</b>	1	2	1	0	0	4
<b>TOTAL FOOD SERVICES AND DRINKING PLACES</b>	15	55	14	1	0	85

## Tourism establishments, trends 2010-2012

The data relied upon to track trends in the number of establishments in the tourism sector for 2010 to 2012 was only available at the 3-digit level, and so five subsectors will be presented:

- Performing Arts, Spectator Sports and Related Industries
- Heritage Institutions
- Amusement, Gambling and Recreation Industries
- Accommodation Services

- Food Services and Drinking Places

Essentially, between 2010 and 2012, there have been decreases among smaller establishments in the Accommodation Services as well as Food Services & Drinking Places, with only a small increase among Food Services & Drinking Places with 20-99 employees. Thus, the trend toward establishments that was experienced between 2006 and 2010 is continuing, although it appears to be flattening out somewhat.

Performing Arts, Spectator Sports and Related Industries. This represents a small number of establishments and there has been virtually no change over two years (much the same in Muskoka).

**Table 15: Number of establishments by employee size, Parry Sound, 2010-2012, Performing Arts, Spectator Sports and Related Industries**

	Number of employees					TOTAL
	0	1-4	5-19	20-99	100+	
<b>June 2010</b>	8	1	1	0	0	10
<b>June 2011</b>	7	3	1	0	0	11
<b>June 2012</b>	6	3	1	0	0	10

Heritage Institutions. Another category with few establishments. The only change is one establishment falling from the 5-19 employee size to the 1-4 employee size (in Muskoka, also a very small category; one establishment grew in size).

**Table 16: Number of establishments by employee size, Parry Sound, 2010-2012, Heritage Institutions**

	Number of employees					TOTAL
	0	1-4	5-19	20-99	100+	
<b>June 2010</b>	0	0	3	0	0	3
<b>June 2011</b>	0	1	2	0	0	3
<b>June 2012</b>	0	1	2	0	0	3

Amusement, Gambling and Recreation Industries. Again, essentially no change in the number of establishments, with a very slight improvement in the employee size distribution (in Muskoka, there has been a slight increase in the number of establishments).

**Table 17: Number of establishments by employee size, Parry Sound, 2010-2012, Amusement, Gambling and Recreation Industries**

	Number of employees					
	0	1-4	5-19	20-99	100+	TOTAL
<b>June 2010</b>	14	17	16	6	0	53
<b>June 2011</b>	16	14	19	5	0	54
<b>June 2012</b>	14	15	18	6	0	53

Accommodation Services. A considerable drop in the number of establishments, most of which were in the “0” and “1-4” employee categories (in Muskoka, a much smaller drop, balanced by increases among establishments with “20-99” and “100+” employees).

**Table 18: Number of establishments by employee size, Parry Sound, 2010-2012, Accommodation Services**

	Number of employees					
	0	1-4	5-19	20-99	100+	TOTAL
<b>June 2010</b>	71	23	24	4	1	123
<b>June 2011</b>	60	22	18	3	2	105
<b>June 2012</b>	66	14	20	4	1	105

Food Services and Drinking Places. Again, one witnesses a considerable drop among smaller establishments, including those with 5-19 employees, but a slight increase among establishments with 20-99 employees (rather similar in Muskoka).

**Table 19: Number of establishments by employee size, Parry Sound, 2010-2012, Food and Drinking Places**

	Number of employees					
	0	1-4	5-19	20-99	100+	TOTAL
<b>June 2010</b>	25	18	47	17	0	107
<b>June 2011</b>	17	21	36	18	0	92
<b>June 2012</b>	18	21	35	19	0	93

## TOURISM WORKFORCE DATA

The workforce data relies on a single source, the Statistics Canada Census, for which the most recent data remains the 2006 Census (while data from the 2011 Census is becoming available for such categories as population and dwelling counts, the more detailed data, such as occupation data, was not yet available at the time of writing this report). While the 2006 Census data is somewhat out-of-date, it is still relevant as far as proportions and comparisons go, as these tend to be more stable, even as the absolute numbers change.

The tourism workforce data will involve two types of numbers, firstly, the count of the actual jobs, by industry and by occupation, and secondly, the count of residents employed. The count of actual jobs can only report on those jobs that are physically present in a given district. The data for residents relates to where they live, not where they work. By and large, a large proportion of residents work in the same district as where they live, although there certainly is cross-district/county commuting. The actual job number undercounts the true number of jobs, as it does not include jobs with no fixed workplace (the best example of which is in construction, where labourers move from one construction site to another). The resident data is thus more likely to capture all employment, and so it will be used to describe the demographic characteristics of the tourism workforce.

### Tourism workforce by industry

In this report, jobs in the tourism sector will be defined by the following industry subsectors (the corresponding North American Industry Classification System code precedes each heading):

711 Performing arts, spectator sports and related industries	Includes performing arts companies (theatre companies, dance companies), spectator sports (team sports, horse race tracks), promoters of such events, as well as festivals, agents and managers, and independent artists and performers
712 Heritage institutions	Museums, non-commercial arts museums and galleries, historical sites, zoos and botanical gardens
713 Amusement, gambling and recreation industries	Amusement parks and arcades, casinos, golf courses, skiing facilities, marinas, fitness centres, bowling alleys
7211 Traveller accommodation	Hotels, resorts, motels, bed and breakfasts, housekeeping cottages and cabins
7212 RV parks and recreational camps	RV parks, hunting and fishing camps, vacation camps
7221 Full-service restaurants	Full-service restaurants
7222 Limited-service eating places	Limited-service eating places

7224 Drinking places	Drinking places (alcoholic beverages)
----------------------	---------------------------------------

Local jobs in the tourism sector. The following table provides the number of tourism jobs located in Parry Sound by tourism industry subsector, and compares the results to Muskoka and Ontario minus Toronto (the labour market and tourism sector in Toronto is sufficiently different from the rest of Ontario that a more appropriate comparison is with Ontario but minus the numbers for Toronto).

As noted above, these figures slightly undercount the number of jobs, since they only can report jobs with a fixed workplace. Thus, actors who may move from theatre to theatre would not be included in this count. As well, given that the census is administered in May, these figures may also undercount seasonal jobs.<sup>10</sup>

<b>Table 20: Number of jobs, tourism sub-industries and all jobs, Parry Sound, Muskoka and Ontario minus Toronto, 2006</b>			
	<b>Parry Sound</b>	<b>Muskoka</b>	<b>Ontario minus Toronto</b>
<b>711 Performing arts, sports</b>	65	165	17,380
<b>712 Heritage institutions</b>	55	95	5,565
<b>713 Amusement, recreation</b>	450	790	68,115
<b>7211 Traveller accommodation</b>	475	1,555	37,765
<b>7212 RV parks/camps</b>	170	480	4,905
<b>7221 Full-service restaurants</b>	390	890	112,115
<b>7222 Limited-service eating</b>	250	815	108,425
<b>7224 Drinking places</b>	15	30	10,385
<b>TOTAL ALL TOURISM</b>	1,870	4,820	364,655
<b>TOTAL ALL JOBS</b>	12,245	26,060	4,234,325
<b>% TOURISM OF ALL JOBS</b>	15.3%	18.5%	8.6%

Table 20 provides a calculation of what percentage of all jobs located in that area fall into the tourism sector. As can be seen, the proportionate size of the tourism industry is quite high in Parry Sound (15.3%), considerably higher than the average for Ontario minus Toronto (8.6%). Muskoka exhibits an even higher percentage (18.5%).

<sup>10</sup> The census question first asks about employment in the last week, including what industry and what occupation. If the respondent had not worked in the last week, the question is asked about employment any time since January 1, 2005. If an individual had several jobs, some occupations would be under-counted.

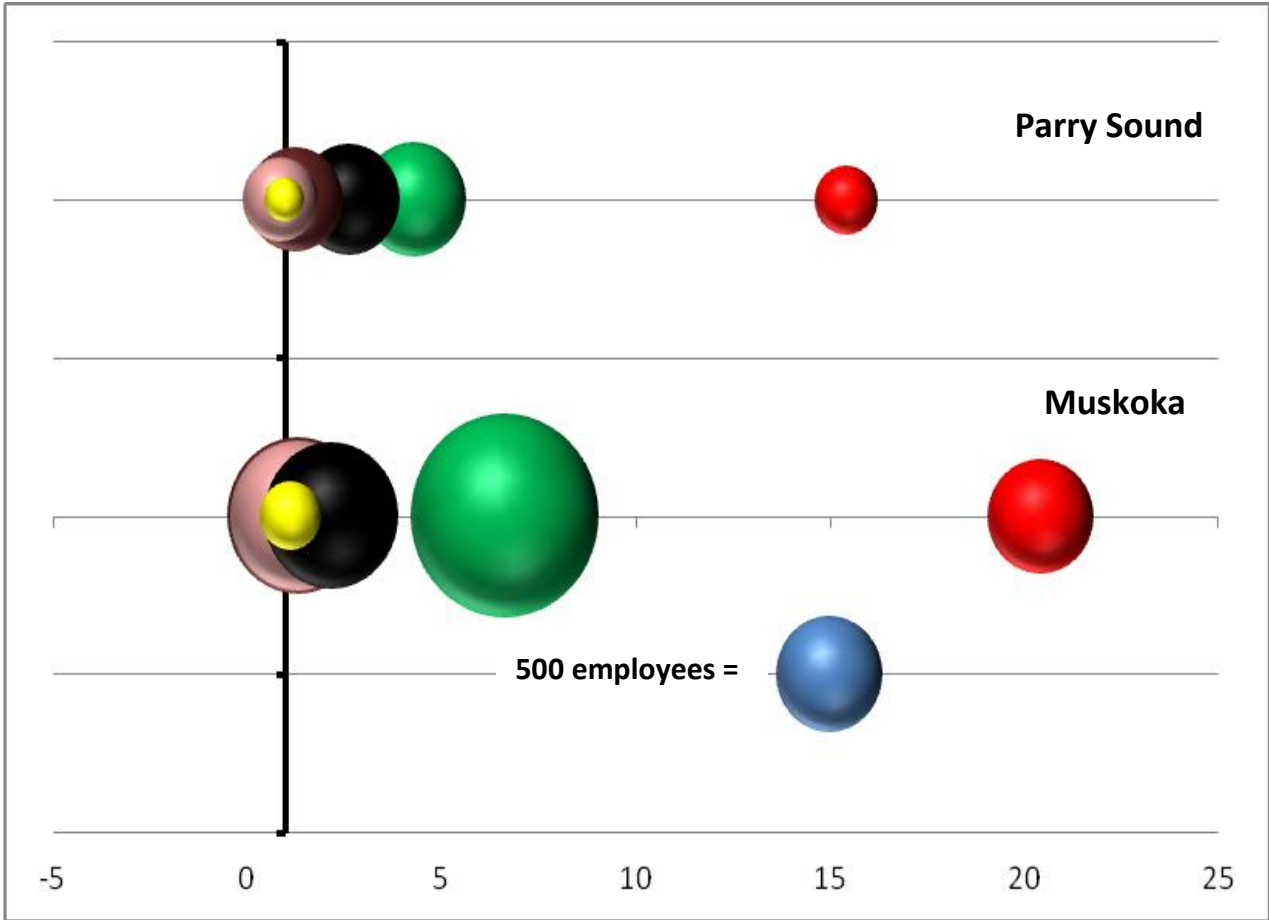


Location quotient. The number of jobs in a given industry subsector can vary significantly by district. Partly, that represents the different profile of the tourism sector in that district, but it is also a function of the total number of jobs. In some cases, the actual number of jobs, while small, may represent a notably higher proportion of all jobs, meaning a greater concentration of that industry locally than elsewhere. To demonstrate this characteristic, the following chart illustrates both the actual number of jobs (represented by the size of each sphere) and the relative concentration of those jobs in that district, in the following way: if the ratio of jobs in an industry to all jobs in that locality is the same as the ratio found in Ontario as a whole, then the relative weight is assigned “1”. If the ratio of jobs in that industry to all jobs is twice the provincial proportion, then the ratio is “2”; if it is half, then “0.5”. This calculation is called an industry location quotient.

Only six of the eight tourism subsectors are mapped in Chart 8 that follows; heritage institutions and drinking places tend to have smaller job numbers and would not show up well on these charts, given the scale.

Thus, Parry Sound has a notably higher local concentration of jobs among RV parks and recreational camps as well as traveller accommodation, industry subsectors which are even more pronounced in Muskoka (red and green spheres at the farther right end of the location quotient scale).

**Chart 8: Absolute number of jobs and location quotient, select tourism subsectors, Parry Sound and Muskoka, 2006**



LEGEND	
Performing arts, spectator sports and related industries	
Amusement, gambling and recreation industries	
Traveller accommodation	
RV parks and recreational camps	
Full-service restaurants	
Limited service eating places	
Scale = 500 employees	

Residents employed in the tourism sector. As mentioned earlier, the number of jobs present in a given location is not necessarily equal to the number of residents employed—people commute to jobs beyond their municipality. In addition, there is not an equivalence between jobs and residents employed—local jobs can only be tied to a given location, but people also work in jobs that have no fixed location—trades people in construction, actors moving from theatre to theatre, cleaners assigned to different buildings in

different cities. Nevertheless, it is worthwhile to compare the numbers and proportions of local jobs and employed residents in the tourism industry. These figures are provided in Table 21 for Parry Sound and, for comparison's sake, for Muskoka.

<b>Table 21: Number of jobs and employed residents, tourism sub-industries and all jobs, Parry Sound and Muskoka, 2006</b>				
	<b>Parry Sound</b>		<b>Muskoka</b>	
	<b>Jobs</b>	<b>Employed Residents</b>	<b>Jobs</b>	<b>Employed Residents</b>
<b>711 Performing arts, sports</b>	65	65	165	190
<b>712 Heritage institutions</b>	55	30	95	110
<b>713 Amusement, recreation</b>	450	490	790	770
<b>7211 Traveller accommodation</b>	475	620	1,555	950
<b>7212 RV parks/camps</b>	170	125	480	155
<b>7221 Full-service restaurants</b>	390	440	890	775
<b>7222 Limited-service eating</b>	250	335	815	810
<b>7224 Drinking places</b>	15	25	30	35
<b>TOTAL ALL TOURISM</b>	1,870	2,130	4,820	3,795
<b>TOTAL ALL EMPLOYMENT</b>	12,245	18,615	26,060	29,040
<b>% TOURISM OF ALL JOBS</b>	15.3%	11.4%	18.5%	13.1%

Typically, for a larger geographic area (as opposed to a neighbourhood) the total number of residents employed should exceed the number of local jobs because, in addition to local jobs, residents are employed in jobs that have no fixed address, unless there is a heavy amount of commuting. This is indeed the case for both Parry Sound and Muskoka, if one looks at the row "Total All Employment." Thus, the total number of all jobs in Parry Sound in 2006 was 12,245 and the total number of employed residents was 18,615.

While the same pattern holds for tourism employment in Parry Sound, the same is not the case for Muskoka, where the number of employed residents in the tourism sector is 3,795, while the total number of jobs is 4,820. One assumes these jobs are filled by people who live outside of Muskoka, and it would appear a large proportion of them work in traveller accommodation, RV parks and recreation camps, and full-service restaurants, where the difference in the numbers is most pronounced. One can well imagine that not a small number of staff at recreation camps, for example, come for employment in the summer to Muskoka but live elsewhere.

This same reasoning would apply to Parry Sound, where in the case of RV parks and recreation camps the number of employed residents is less than the number of jobs.

## Tourism workforce by occupation

There are various ways to categorize jobs, for example by occupation, by industry, or by employment income. One approach takes the 520 occupations defined under the National Occupational Classification (NOC) and clusters them as follows:<sup>11</sup>

Knowledge workers – jobs that absolutely require a university degree or a three-year college diploma or a highly refined skill;

Middle jobs – jobs that typically do not require a post-secondary degree but which do require some skill, usually acquired through several years of work or through apprenticeship; and

Entry-level jobs – jobs that typically require a high school diploma, but otherwise require no experience, as well as the next-level job immediately accessible after a short period in an entry-level job.

The Middle and Entry-level jobs can be further divided by broad industrial sector:

Service sector: occupations engaged in the provision of services;

Working sector: occupations engaged in manufacturing, the trades and transportation;

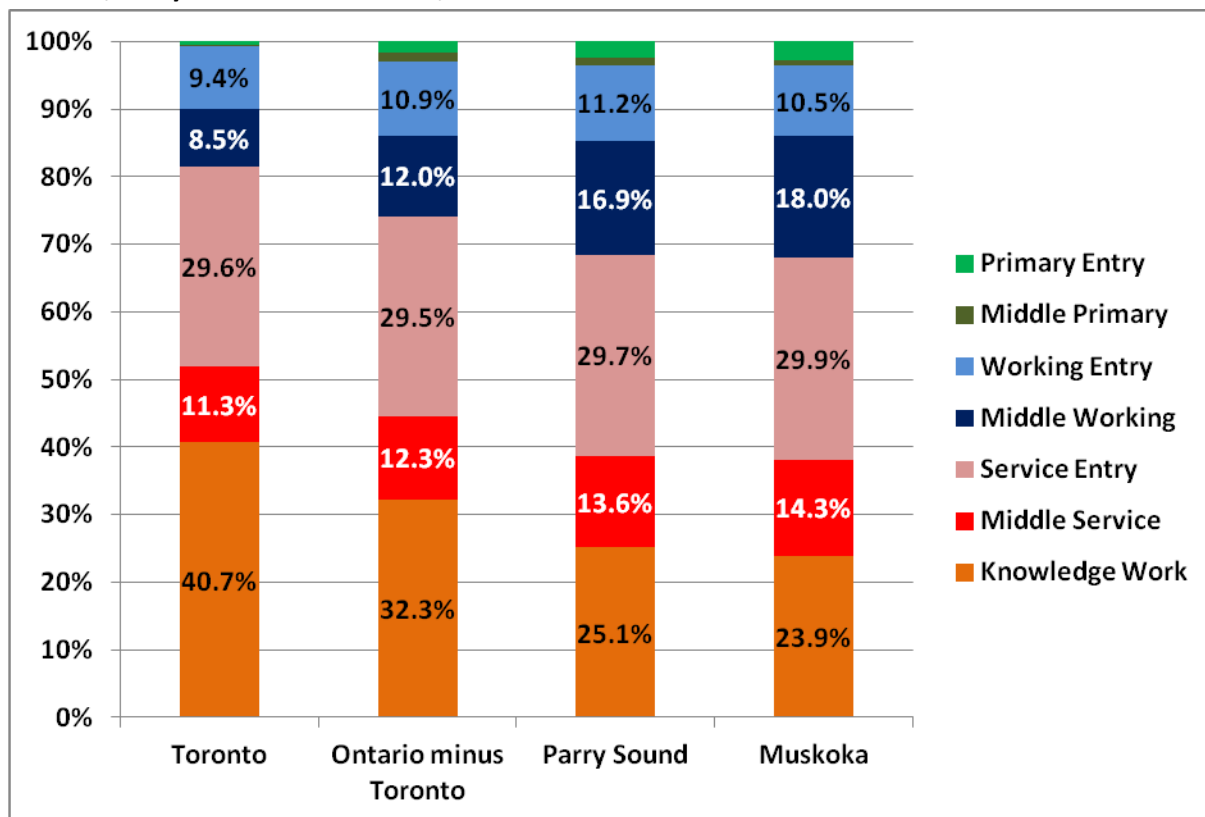
Primary sector: occupations engaged in agriculture, fishing, farming, and oil and mining.

When we divide all employed residents by this skill/sector framework, we get noticeably divergent results for different areas.

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<sup>11</sup> This classification approach is first applied in Tom Zizys, *An Economy Out of Shape: Changing the Hourglass*, Toronto Workforce Innovation Group, 2010.

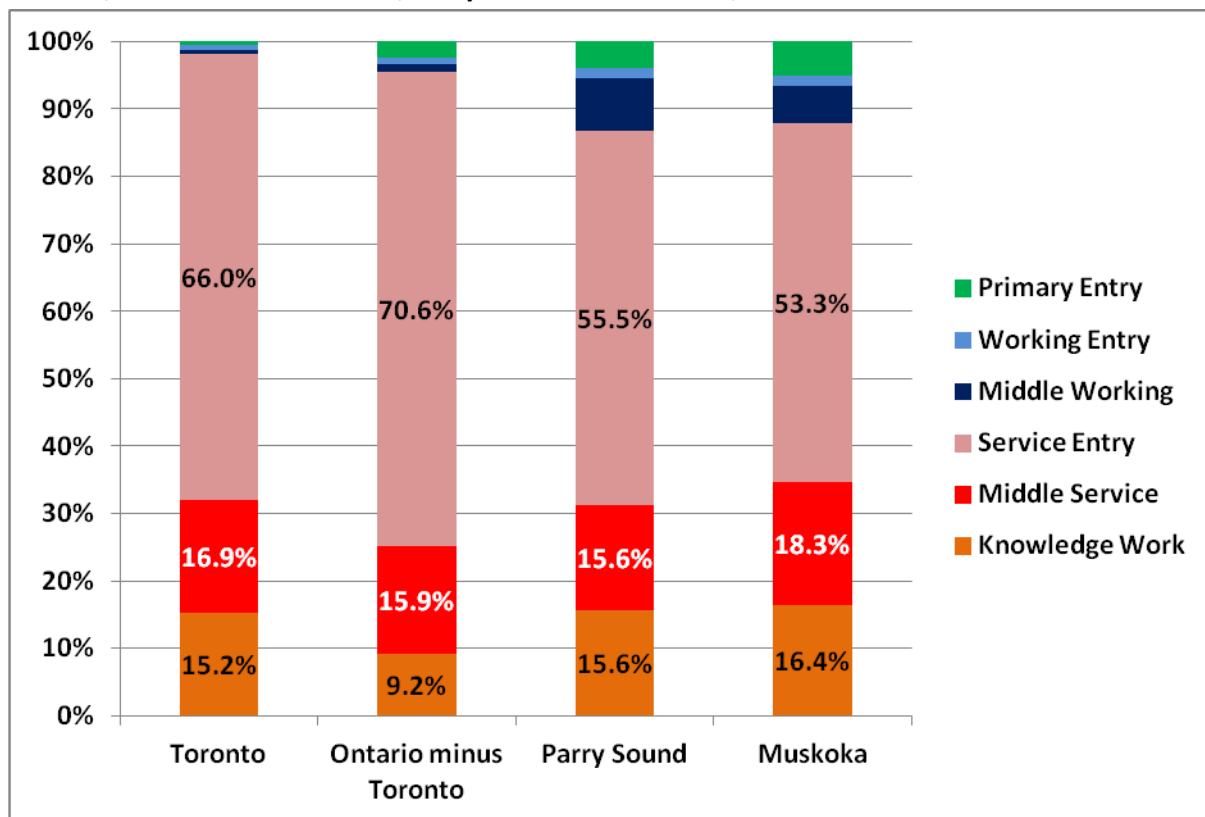
**Chart 9: Distribution of employed residents by the skills/sector framework, Toronto, Ontario minus Toronto, Parry Sound and Muskoka, 2006**



Toronto stands out for the very high proportion of Knowledge Work jobs that its residents are employed in, given the concentration of financial services, corporate head offices, law firms, post-secondary institutions, hospitals and similar establishments located in that city. Because the Ontario figures are greatly affected by the inclusion of Toronto's numbers, it is more appropriate to represent Ontario minus the Toronto numbers. In that instance, the rest of Ontario has a noticeably smaller proportion of its residents employed in Knowledge Work jobs. Parry Sound scores lower in Knowledge Work jobs, rather similar to the results for Muskoka. On the other hand, Parry Sound scores higher with Middle Service, Middle Working and Entry Working jobs. Notably, Parry Sound has exactly the same proportion of Service Entry jobs as everywhere else.

The tourism sector is made up of many service sector entry-level jobs and in Toronto and the rest of Ontario, approximately two-thirds (65-71%) of all tourism jobs are entry-level occupations. In Parry Sound (and in Muskoka) that proportion is closer to 50%, as seen from Chart 10.

**Chart 10: Distribution of residents employed in the tourism sector by the skills/sector framework, Toronto, Ontario minus Toronto, Parry Sound and Muskoka, 2006**



However, this statistic is a little misleading: the smaller proportion of entry-level jobs is a result of the large number of very small establishments, typically owner-run, whose job classification would fall into a Knowledge Work category (as owner/manager), but whose functions run the gamut from manager to front desk clerk to cook and to landscaper.

The actual skills/sector breakdown for each of the tourism subsectors in Parry Sound is provided in Chart 11. Because the overall labour market in Parry Sound is smaller, the numbers for some categories are very small, so that they exaggerate the point. Evidently, different sectors in the tourism industry demand on a different mix of occupations and skills. The Performing Arts sector is almost exclusively made up of Knowledge Workers (artists and performers in this case), while Drinking Places are almost exclusively made up of Entry-level Service workers. The point is that the mix of industry subsectors in a location determines the demand for different levels of skills.

Chart 11: Distribution of residents employed in the tourism subsectors by the skills/sector framework, Parry Sound, 2006

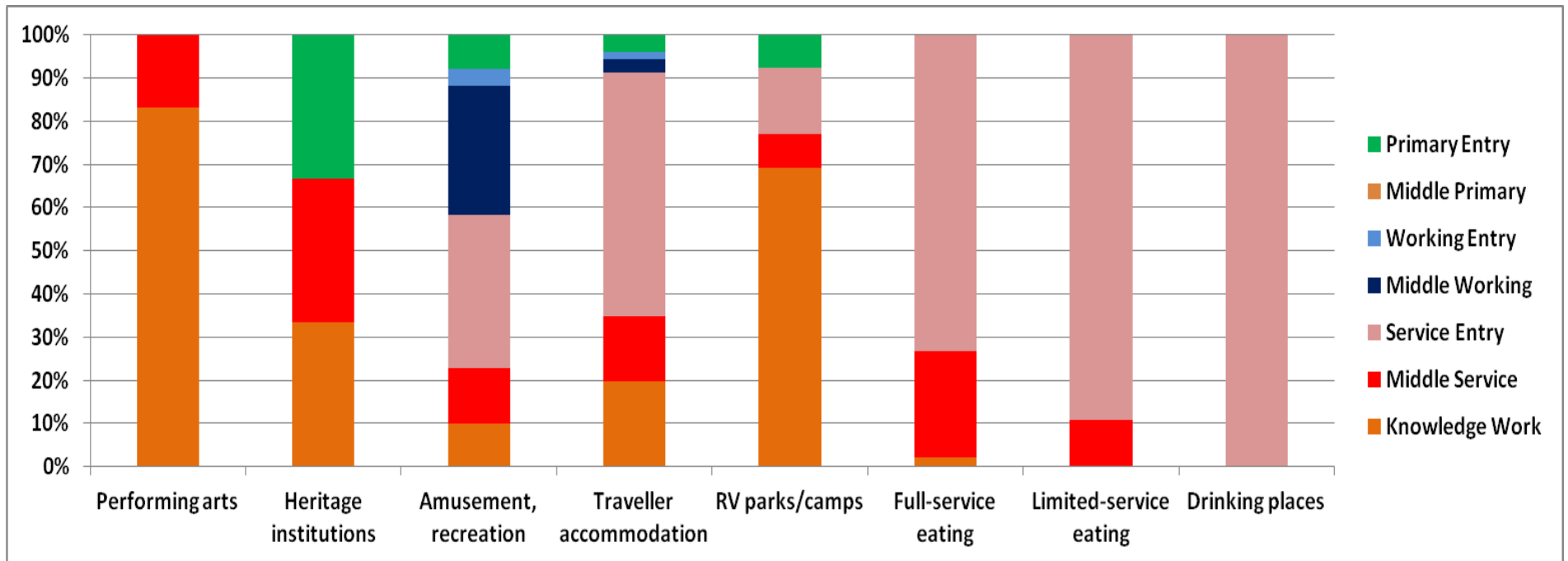


Table 22 provides the top 20 tourism occupations in Parry Sound in 2006, counting only those workers employed in a tourism sector industry (for example, a cashier employed at a restaurant, but not a cashier employed at a grocery store). Where an occupation is followed by a bracketed number in bold, that reflects the ranking of that occupation among all occupations in the tourism industry in Ontario.

<b>Table 22: Top 20 occupations in the tourism sector in Parry Sound, employed residents, 2006</b>			
	<b>Occupation</b>	<b>Number</b>	<b>%</b>
<b>1.</b>	Food and beverage servers <b>(2)</b>	255	<b>96%</b>
<b>2.</b>	Food counter attendants & kitchen helpers <b>(1)</b>	245	<b>86%</b>
<b>3.</b>	Accommodation service managers	195	<b>83%</b>
<b>4.</b>	Light duty cleaners <b>(7)</b>	170	42%
<b>5.</b>	Cooks <b>(3)</b>	125	64%
<b>6.</b>	Restaurant and food service managers <b>(4)</b>	115	72%
<b>7.</b>	Janitors and building superintendents	85	21%
<b>8.</b>	Landscaping/grounds maintenance labourers	75	25%
<b>9.</b>	Cashiers <b>(5)</b>	65	17%
<b>10.</b>	Facility operation and maintenance managers	60	<b>86%</b>
<b>11.</b>	Hotel front desk clerks	50	<b>100%</b>
<b>12.</b>	Small engine and equipment mechanics	50	59%
<b>13.</b>	Retail salespersons and sales clerks	45	5%
<b>14.</b>	Chefs <b>(8)</b>	40	<b>80%</b>
<b>15.</b>	Food service supervisors <b>(10)</b>	35	78%
<b>16.</b>	Program instructors in recreation <b>(6)</b>	35	54%
<b>17.</b>	Bookkeepers	30	14%
<b>18.</b>	Operators in amusement and sport	30	<b>86%</b>
<b>19.</b>	Painters, sculptors and other visual artists	30	<b>86%</b>
<b>20.</b>	Bartenders <b>(9)</b>	25	56%

The ranking by size of occupation illustrates a number of differences that distinguish Parry Sound. For one, a couple of occupations prominent in the tourist industry across Ontario (casino occupations, ranked 11<sup>th</sup>, and maîtres d'hôtel and hosts/hostesses, ranked 14<sup>th</sup>) don't even show up on the Parry Sound list. Secondly, accommodation service managers rank quite high on the Parry Sound list. This is primarily because there are a lot of small operators: indeed, seven out of ten such managers in Parry Sound are self-employed, compared to four out of ten in Ontario. Thirdly, several occupations reflect the outdoor activities prominent in Parry Sound, with facility operators and maintenance managers, as well as small engine and equipment mechanics, highlighting the importance of marinas in Parry Sound.



That being said, Entry-level Service jobs are prominent on the list, notably food and beverage servers, food counter attendants and light duty cleaners, which occupy three of the top four categories. At the same time, three managerial positions figure in the top ten: accommodation service managers, restaurant and food service managers and facility operation and maintenance managers.

The third column in Table 22 lists the proportion of all jobs in that occupation which are found among the tourism sector industries in Parry Sound. Thus, hotel front desk clerks are all employed in the tourism sector (100%), while only 5% of retail sales clerks are. Eight of these occupations have 80% or more of their jobs located in the tourism sector (the percentage is bolded).

### Employment by gender in the tourism sector

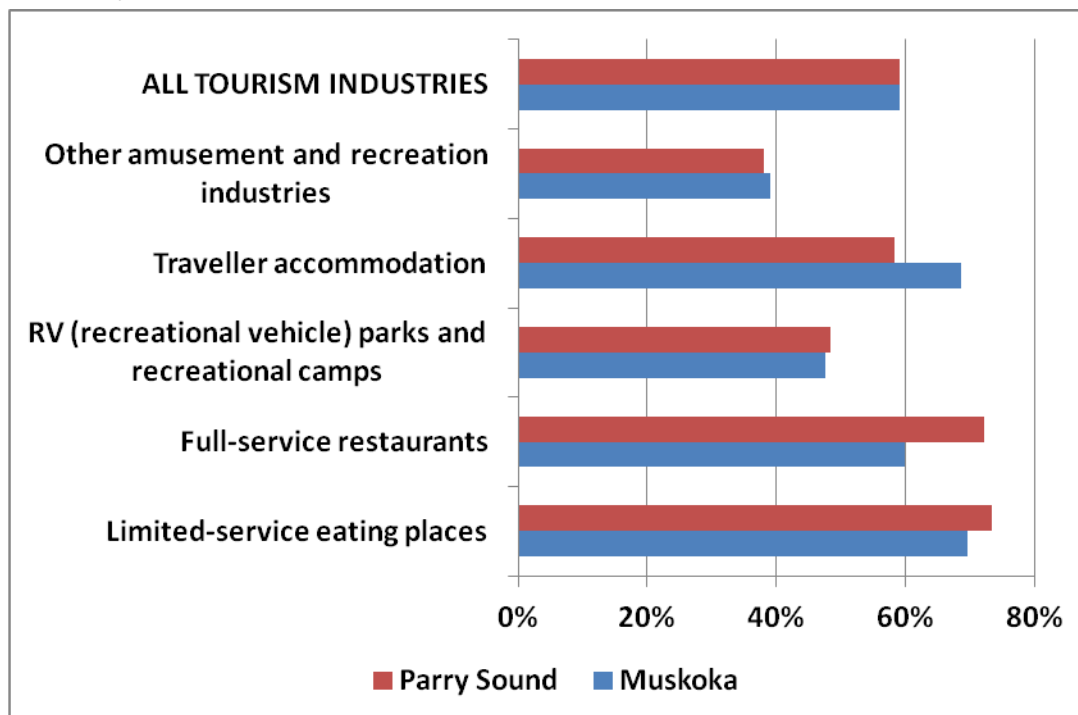
As a general rule in Ontario, roughly 60% of the labour force in the tourism sector is female (Table 23). The exception is Toronto, where the split is almost exactly 50-50. Parry Sound very much follows the pattern for the rest of Ontario minus Toronto.

<b>Table 23: Labour force proportions by gender, tourism and all industries, Toronto, Ontario minus Toronto, Parry Sound and Muskoka, 2006</b>				
	<b>TOURISM INDUSTRY</b>		<b>ALL INDUSTRIES</b>	
	<b>Males</b>	<b>Females</b>	<b>Males</b>	<b>Females</b>
<b>TORONTO</b>	50.1%	49.9%	51.9%	48.1%
<b>ONTARIO MINUS TORONTO</b>	41.8%	58.2%	52.3%	47.7%
<b>PARRY SOUND</b>	41.0%	59.0%	52.6%	47.4%
<b>MUSKOKA</b>	40.7%	59.3%	52.3%	47.7%

Individual industries within the tourism sector have different proportions of males and females. Chart 12 illustrates these different proportions and compares the results for Parry Sound with those for Muskoka by listing the percentage of females in the labour force for each subsector identified. There are a few differences between Parry Sound and Muskoka: Muskoka has a higher proportion of females working in the Traveller Accommodation sector. This is likely because Muskoka has far more establishments with larger staff complements,<sup>12</sup> where the larger proportion of entry-level positions is held by females. On the other hand, females make up an even greater percentage of the labour force in the full-service restaurant category.

<sup>12</sup> In the Accommodation Services sector in June 2012, Muskoka had 25 establishments with 20-99 employees and 5 establishments with 100+ employees, while Parry Sound had 4 and 1 respectively.

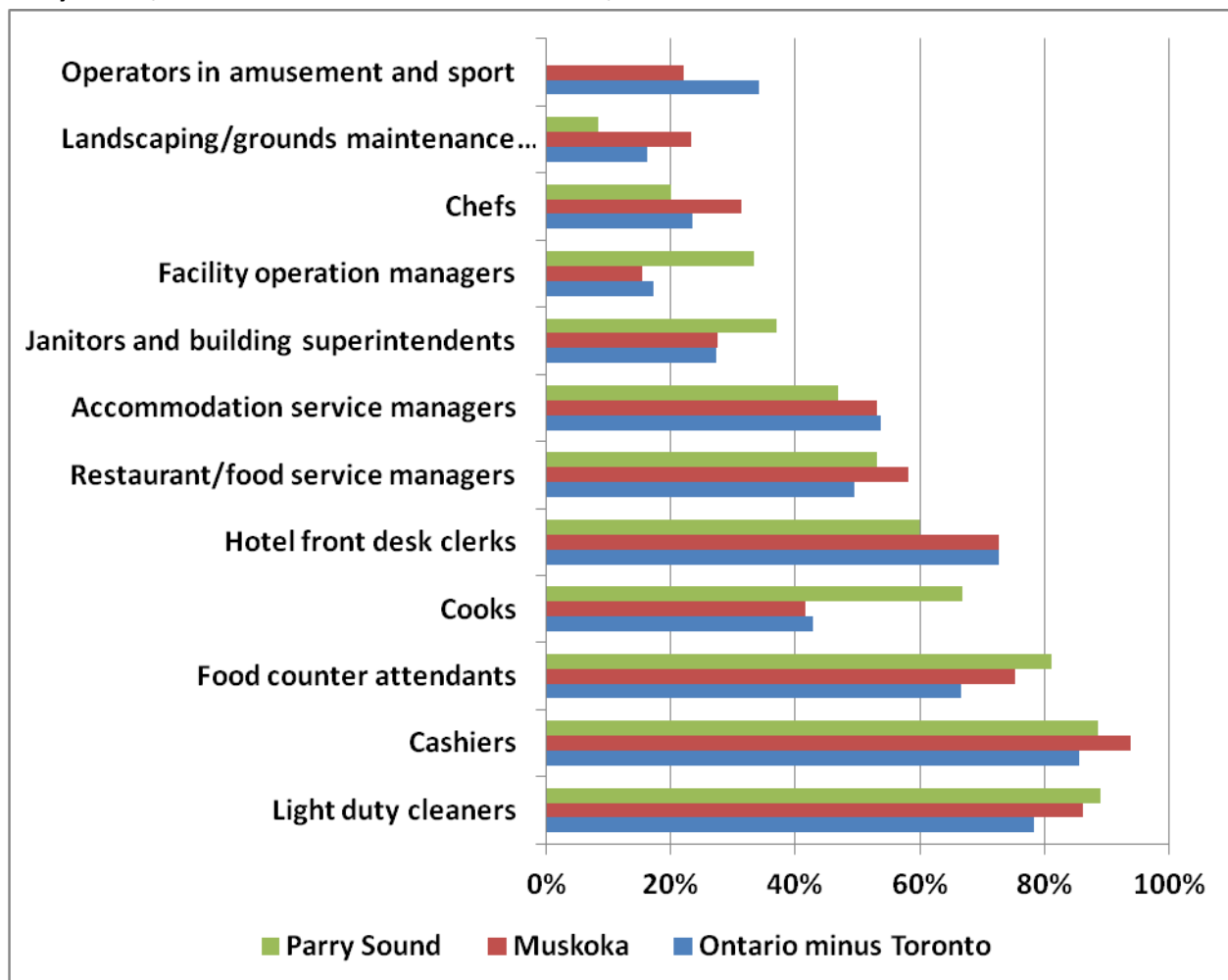
**Chart 12: Percentage of females in the labour force by select tourism subsectors, Parry Sound and Muskoka, 2006**



Of course the variable gender proportions by industry subsectors are also a result of different mixes of occupations, which themselves have a variable gender balance. Chart 13 illustrates the gender proportions for prominent occupations in the tourism sector (the figures represent the proportions for each occupation across all industries, not just limited to tourism).

Parry Sound pretty well follows the pattern evident in Muskoka and the rest of Ontario (minus Toronto), with a few limited exceptions: in Parry Sound, there are proportionately more female cooks, janitors and facility operations managers, and proportionately fewer female landscaping labourers and operators in the amusement, sport and recreation industries.

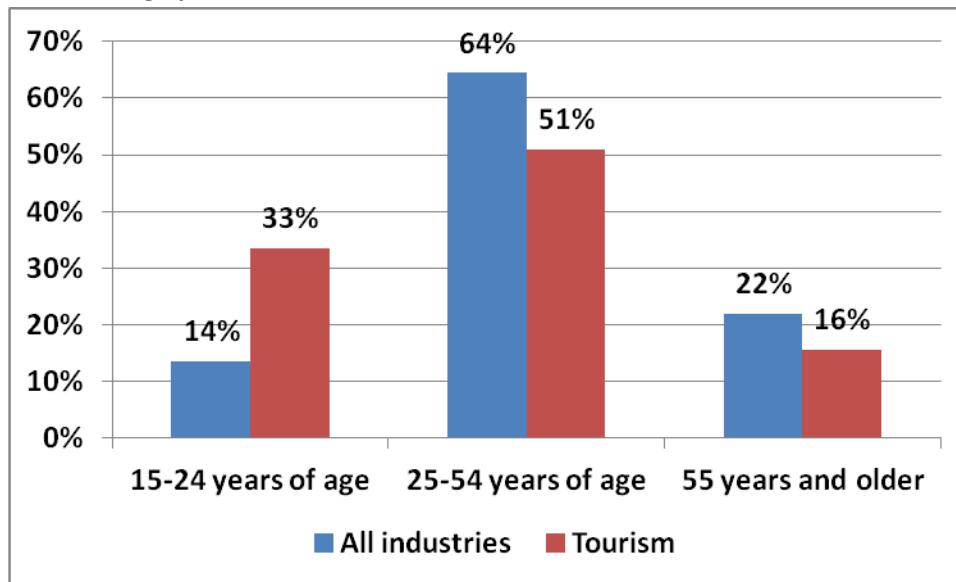
**Chart 13: Percentage of female residents employed in occupations prevalent in the tourism sector, Parry Sound, Muskoka and Ontario minus Toronto, 2006**



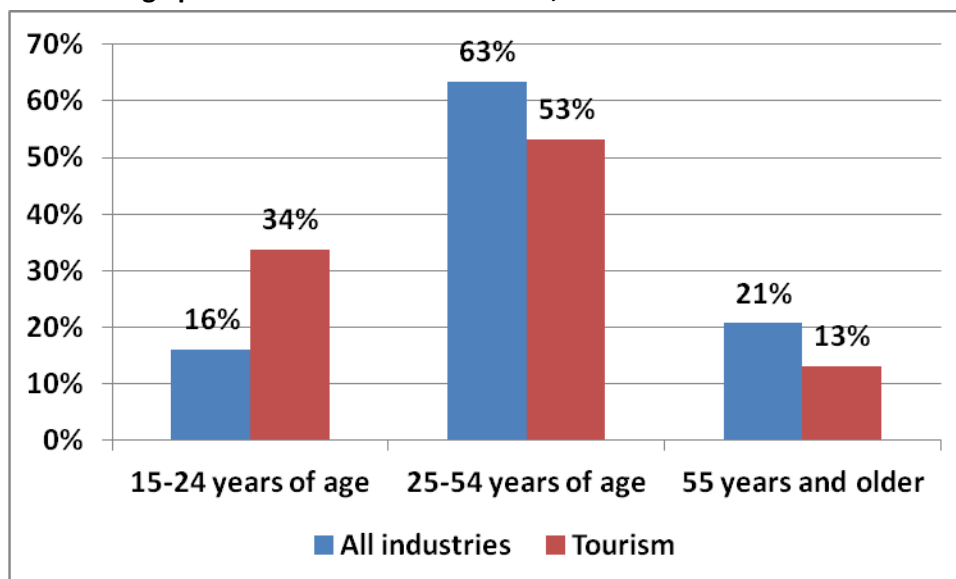
### Employment by age in the tourism sector

A noticeable feature of the age profile of tourism workers is the greater proportion of youth. In all regions, there is a pronounced slant toward younger workers, compared to the age profile for workers across all industries. However, as significant as the youth proportion is in Parry Sound (as well as in Muskoka), it is a considerably smaller proportion than that found in the rest of Ontario (minus Toronto). Charts 14 to 16 provide the age profile of the labour force for all industries and for tourism in each of Parry Sound, Muskoka and Ontario minus Toronto.

**Chart 14: Age profile of resident force labour, tourism sector and all industries, Parry Sound, 2006**

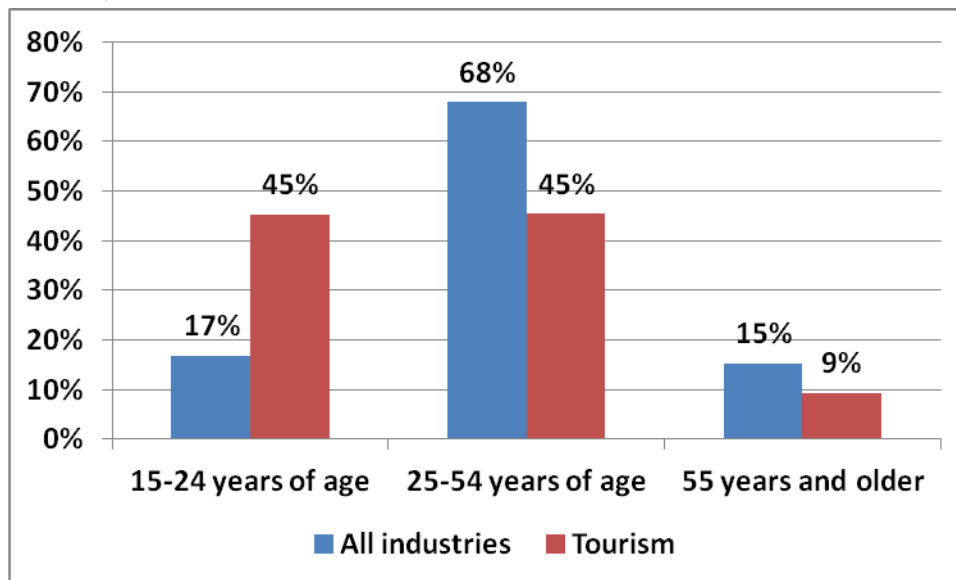


**Chart 15: Age profile of resident force labour, tourism sector and all industries, Muskoka, 2006**



As these charts for Parry Sound and Muskoka demonstrate, the labour force distribution by age for both areas is very similar, for the three age categories provided. In comparison to the rest of Ontario (minus Toronto), both Parry Sound and Muskoka have fewer youth in their workforce overall, and much fewer youth in their tourism labour force. On the other hand, Parry Sound and Muskoka also have more older workers (aged 55 years and older) among their general workforce and their tourism workforce. This is particularly the case for the tourism sector in Parry Sound.

**Chart 16: Age profile of resident force labour, tourism sector and all industries, Ontario minus Toronto, 2006**



Despite the fact that a smaller proportion of the tourism workforce in Parry Sound and Muskoka is made up of youth, a larger percentage of youth end up working in tourism, compared to other local industries.

**Table 24: Youth tourism labour force as percent of all youth labour force, Parry Sound, Muskoka and Ontario minus Toronto, 2006**

PARRY SOUND			
	ALL	MALES	FEMALES
15 to 24 years old	29%	20%	40%
15 to 19 years old	38%	26%	52%
20 to 24 years old	22%	17%	27%
MUSKOKA			
	ALL	MALES	FEMALES
15 to 24 years old	29%	21%	37%
15 to 19 years old	35%	29%	43%
20 to 24 years old	23%	14%	31%
ONTARIO MINUS TORONTO			
	ALL	MALES	FEMALES
15 to 24 years old	22%	18%	25%
15 to 19 years old	29%	26%	32%
20 to 24 years old	16%	12%	20%

In fact, compared to the rest of Ontario, youth in Parry Sound (and Muskoka) are more likely to find work in the tourism sector: for youth aged 15-24 years of age, 29% of Parry Sound youth were part of the tourism labour force, compared to 22% for Ontario minus Toronto. Particularly striking is the figure for Parry Sound females aged 15 to 19 years of age: of those in the labour force, over half are in the tourism sector (52%), compared to 43% for Muskoka and 32% for Ontario minus Toronto.

### Educational attainment among workers in the tourism sector

The educational attainment levels of the labour force in Parry Sound falls somewhat short of the levels found in the rest of Ontario (minus Toronto). Among employed residents of Parry Sound, there are somewhat higher rates of those without an educational certificate, with a high school diploma, with a trades certificate and with a college degree, while considerably lower levels of individuals with university degrees (a bachelor's degree and above a bachelor's degree). In large measure the figures for Parry Sound are rather similar to what is found in Muskoka.

**Table 25: Educational attainment of all employed residents, Toronto, Ontario minus Toronto, Parry Sound and Muskoka, 2006**

	No certificate, diploma or degree	High school certificate	Apprenticeship or trades certificate	College diploma	Bachelor's degree	Above a Bachelor's degree
<b>Toronto</b>	11%	23%	6%	17%	23%	10%
<b>Ontario minus Toronto</b>	15%	29%	9%	23%	13%	9%
<b>Parry Sound</b>	17%	32%	12%	24%	7%	3%
<b>Muskoka</b>	18%	30%	12%	22%	9%	2%

Focusing on the workforce in the tourism sector, however, the educational attainment rates of the workforce are much like those found elsewhere in Ontario, with the exception of Toronto (Table 26). Thus, in Parry Sound, Muskoka and Ontario minus Toronto, the tourism workforce has very high rates of individuals with no educational certificate (26-28%) or with a high school certificate (32-38%), while in Toronto, one sees much higher rates of individuals with a bachelor's degree (15% versus 7-8% elsewhere) and above a bachelor's degree (6% versus 1-2% elsewhere). This is largely a consequence of newcomers to Canada with post-secondary degrees taking survival jobs in the service sector in Toronto.

**Table 26: Educational attainment of all residents employed in tourism, Toronto, Ontario minus Toronto, Parry Sound and Muskoka, 2006**

	No certificate, diploma or degree	High school certificate	Apprenticeship or trades certificate	College diploma	Bachelor's degree	Above a Bachelor's degree
<b>Toronto</b>	18%	36%	5%	15%	15%	6%
<b>Ontario minus Toronto</b>	28%	38%	5%	16%	8%	2%
<b>Parry Sound</b>	27%	39%	8%	18%	7%	1%
<b>Muskoka</b>	26%	32%	9%	20%	8%	2%

Thus, while Parry Sound's overall workforce may have somewhat lower levels of educational attainment, the educational attainment profile of its tourism sector workforce would appear to follow the pattern found through the rest of Ontario (excluding the particular circumstances of Toronto).

### Employment income in the tourism sector

Employment income is reported in two ways: average income (adding up all the incomes and dividing by the number of workers) and median income (listing all the employed workers from the lowest to the highest earners and taking the employment income of the worker who occupies the midpoint of that list). Further, employment income is best compared among workers who are employed full-time, full-year, to avoid variations caused by different levels of work activity.

Table 27 lists the average and median employment income for several tourist sector occupations, and offers comparisons between Ontario minus Toronto, Toronto, Parry Sound and Muskoka. In most instances, employed residents in Parry Sound make less than their counterparts in Muskoka, Ontario minus Toronto or Toronto. The exceptions are (shaded in green in Table 27):

- Parry Sound residents who work as food counter attendants (full-time, full-year) earn a larger average income than Muskoka, Ontario minus Toronto or Toronto residents;
- Parry Sound residents who work as restaurant and food service managers (full-time, full-year) earn a larger median income than Muskoka, Ontario minus Toronto or Toronto residents.

There are also a few instances where the Parry Sound figures are larger than one of the other areas (shaded in grey in Table 27). Overall, however, the picture suggests that Parry Sound salaries for full-year, full-time work in the tourism sector lag behind that found in the rest of the province.

**Table 27: Average and median employment income, full-year full-time employed residents, select tourism occupations, Ontario minus Toronto, Toronto, Simcoe and Muskoka, 2005**

	Average income				Median income			
	Ontario minus Toronto	Toronto	Parry Sound	Muskoka	Ontario minus Toronto	Toronto	Parry Sound	Muskoka
<b>ALL OCCUPATIONS</b>	54092	62084	47566	45744	45094	43291	37349	38201
<b>Restaurant and food service managers</b>	35418	33146	29968	63821	29698	29622	33518	33018
<b>Accommodation service managers</b>	40186	167894	32687	43817	33333	45524	23888	37399
<b>Chefs</b>	31488	30071	23701	34640	29955	28151	28124	33662
<b>Cooks</b>	22646	23169	20911	25734	20266	21240	21836	23932
<b>Food service supervisors</b>	26815	27154	22082	24668	22045	23551	18805	22257
<b>Food and beverage servers</b>	17044	19721	11938	16549	14649	15973	10640	17433
<b>Food counter attendants</b>	20828	22451	22524	20368	17998	19695	18902	19626
<b>Light duty cleaners</b>	24146	25025	19411	19997	22804	24506	22414	15163

### Full-time, part-time and seasonal work

As a general proposition, a larger proportion of jobs in the service sector are part-time, and women are more likely to work part-time in any industry. By and large, this pattern holds true in the tourism sector.

Table 28 compares the proportion of workers employed full-time, comparing all industries and tourism, for both males and females, in Parry Sound, Muskoka, Ontario minus Toronto and Toronto.



**Table 28: Percentage of employed residents working full-time (30 hours or more per week), comparing all industries and the tourism sector, Parry Sound, Muskoka, Ontario minus Toronto, and Toronto, 2005**

PARRY SOUND			MUSKOKA		
	All industries	Tourism		All industries	Tourism
Males	82%	72%	Males	83%	66%
Females	67%	57%	Females	66%	60%
ONTARIO MINUS TORONTO			TORONTO		
	All industries	Tourism		All industries	Tourism
Males	84%	55%	Males	84%	66%
Females	69%	49%	Females	74%	57%

The full-time rate for males in all industries in Parry Sound pretty much falls in the range experienced elsewhere (82%), however the full-time rate for males in the tourism industry is much higher than that experienced in Ontario minus Toronto, as well as higher than the figure for Muskoka. The full-time rate for females working in tourism in Parry Sound is also somewhat higher than the figure for Ontario minus Toronto (57% compared to 49%, although lower than the rate for Muskoka).

The different results for Parry Sound have their origin in different full-time/part-time ratios for different subsectors of the tourism industry. Table 29 compares the full-time employment rates for four subsectors, for males and females, between Parry Sound and Ontario minus Toronto.

**Table 29: Percentage of employed residents working full-time (30 hours or more per week), select tourism subsectors, Parry Sound and Ontario minus Toronto, 2005**

	Traveller accommodation	RV parks & recreation camps	Full-service restaurants	Limited-service eating places
<b>MALES</b>				
<b>Ontario minus Toronto</b>	71%	80%	56%	39%
<b>Parry Sound</b>	81%	92%	63%	35%
<b>FEMALES</b>				
<b>Ontario minus Toronto</b>	65%	65%	44%	44%
<b>Parry Sound</b>	72%	77%	57%	46%

There is a higher rate of full-time work for both males and females in Parry Sound in the traveller accommodation and RV parks & recreational camps sectors, and particularly for females working in the full-service restaurant sector. However, that higher rate of full-time work does not carry over into limited-service eating places sector.

These different rates of full- and part-time work in the tourism sector may be related to the greater seasonality of employment in the tourism sector in Parry Sound. Table 30 compares the average number of weeks worked in the year (2005) for full-time and part-time work in several tourism subsectors.

Looking at the average weeks worked for all industries, one can see there is virtually no difference between Parry Sound, Muskoka, Ontario and Toronto. However, the figures for average weeks worked in the tourism sector are different.

Firstly, a subsector like amusement, gambling and recreation industries often does have a high degree of seasonality (golf courses, marinas, ski hills), balanced by year-round activities (such as gambling, bowling, recreation centres). This may explain why there is not so much variation in the average weeks worked across the geographies being compared.

**Table 30: Average weeks worked, full-time and part-time workers, all industries and select tourism subsectors, Parry Sound, Muskoka, Ontario and Toronto, 2005**

	ALL INDUSTRIES	Amusement, recreation	Traveller accommodation	RV parks & recreation camps	Full-service restaurants	Limited-service eating places
<b>PARRY SOUND</b>						
Full-time workers	45	36	41	31	39	37
Part-time workers	34	28	34	28	31	26
<b>MUSKOKA</b>						
Full-time workers	46	39	39	34	41	45
Part-time workers	33	22	26	21	34	28
<b>ONTARIO</b>						
Full-time workers	46	41	44	26	44	43
Part-time workers	34	29	30	19	33	31
<b>TORONTO</b>						
Full-time workers	46	37	46	14	42	44
Part-time workers	33	26	32	14	28	34

For traveller accommodation, RV parks, and full-service and limited service eating places, there does appear to be greater seasonality, or at least in Toronto one seeks a tendency toward more weeks worked, especially among full-time workers (with the one exception of RV parks and recreation camps, where these are likely limited to summer camps).

Perhaps it might be the case with a more limited tourist season that part-time workers in Parry Sound seek to work for as much as the season as possible, and so their average weeks worked are closer to the figure for full-time workers than is the case in Ontario or Toronto.

## CONCLUSION

Data is only the starting point of a conversation: numbers give shape and concreteness to an activity, through quantifying the number of visitors or the number of jobs. Numbers allow us to make comparisons, between industries local, and between the local situation and circumstances elsewhere. Numbers may highlight a local quirk, where a familiar local pattern is actually unique compared to other jurisdictions. But numbers can also be wrong – local knowledge trumps the validity of some statistical observation.

This report sought to describe the tourism workforce in Parry Sound, by highlighting the visitor data and the trends in tourism establishments, and by profiling numbers quantifying the tourism workforce.

Parry Sound receives a large number of visitors compared to its resident population, much of it highly seasonally, the vast majority of whom are overnight visitors, more than half staying in private cottages. By far the most prominent visitor activities are boating and fishing.

Many of the local tourism establishments are small, while many of the prominent tourism occupations are entry-level positions such as food and beverage servers, food counter attendants and light duty cleaners. However, high on the list of larger occupations are accommodation service managers, which speaks to the large number of small operators. Given the draw of the natural attractions of Parry Sound, a tourism workforce strategy would likely need to focus as much on promoting emerging entrepreneurs as it would on preparing individuals for employment, as the former are more likely to lead to sustainable careers in the Parry Sound area.

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