

RT012

Business Confidence & Employment Survey

April 2022



Research Objectives

- A key pillar of RTO12's Regenerative Strategy is the development of a Regional Tourism Data Hub, which will collect ongoing and timely intelligence regarding the overall health of the tourism industry. This data is particularly important as the RTO12 launches programs to help the tourism industry and communities recover and rebuild with long-term sustainability front and centre
- An online dashboard has been conceived to track business confidence, labour gaps & shortages, employee sentiment, resident sentiment, visitor sentiment and, eventually, environmental impact. A series of surveys will be launched to gather the benchmark intelligence to create the dashboard, which will be hosted on the RTO12 administrative site
- This report presents the outcome of the first phase of data gathering a survey of regional tourism business owners. The objectives of this survey are to create a bi-annual business confidence index as well as to quantify full and part-time labour shortages in the region





Highlights - Business Confidence

- With respect to Business Confidence, our findings are consistent with that of other similar measures such as the CFIB Business Barometer. Respondents to our survey are generally positive about their prospects for the upcoming season, **with 79% falling into our Mid and High Confidence levels**
- A majority of respondents are optimistic that they will be able to meet their business objectives this season, with those in Parry Sound particularly optimistic
- On a related finding, 54% of respondents expect sales to be higher this year
- Despite that optimism, respondents indicate staffing is a big concern, with almost half of respondents pessimistic that they will be able to properly staff this season
- Inflation preoccupies the Canadian consumer right now, and business operators in RTO 12 are no different. Fully 60% of respondents say rising prices – and rising fuel prices in particular – will limit their ability to achieve their business objectives
- Not only do a majority point to inflation as a limiting factor, over 80% of this majority say they have a very high level of concern about it
- Lack of employees and increasing labour costs (the handmaiden of inflation) are also seen as limiting factors

Highlights - Employment Survey

- Based on the weighted survey data, we estimate the following labour shortages this year:
1,300 full-time positions | 4,640 part-time positions
- In 2022, respondents indicate they will have an average of 8 full-time and 15 part-time or seasonal staff
- About 43% of respondents say they have full-time vacancies, **with an average of 3.7 open positions**. 60% of respondents say they have part-time vacancies, **with an average of 9.3 open positions**
- The shortage seems most acute in Parry Sound, where the shortfall is twice the overall average
- The proportion of respondents who are optimistic about filling their full-time positions is equal to those who are pessimistic. There is less confidence when it comes to filling the part-time jobs
- Average hourly wage for our respondents is about equal to the provincial minimum of \$15.50
- There's an interesting polarity when comparing accommodation to F&B providers: while female employees dominate in both, 54% of accommodation employees are over 55, versus just 15% of F&B employees
- More than half of respondents say that access to affordable housing significantly impact their ability to recruit new staff



Detailed Findings



Research Methodology and Sample Size

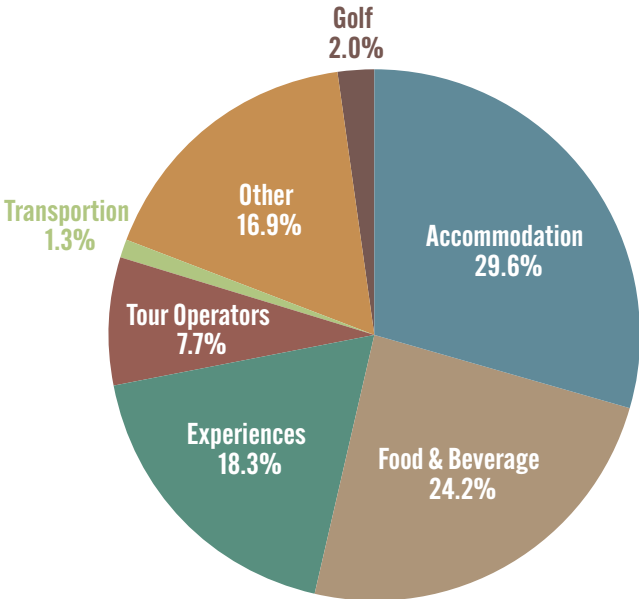
- An online survey consisting of 13 business sentiment and 11 labour situation questions was prepared with the assistance of Environics. The survey took an average of 15 minutes to complete
- The survey was distributed via an email to RTO 12's 800+ email subscribers as well as via an open link
- There were 245 click-throughs to the survey. 125 people started the survey and 96 completed it. 27 of the email subscribers completed the survey with balance coming from the open link survey
- Summary tables of the survey responses were prepared by Environics. This analysis was prepared by Kuration

Notes on Sample Size

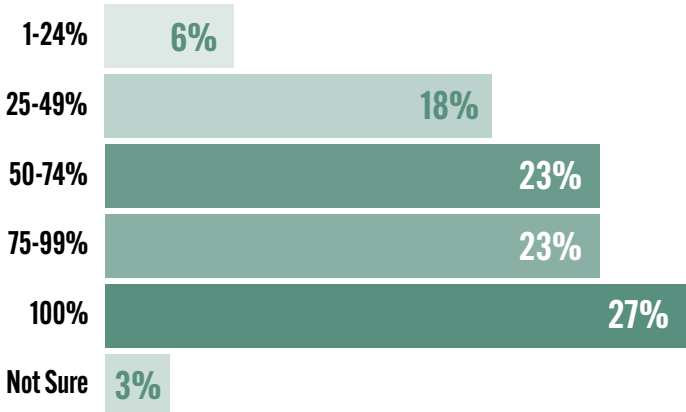
- When reading this report, it is important to keep in mind that these quantitative results (that were collected using an online methodology) are based on the findings of 96 tourism related establishments out of a universe of approximately 841 (a representation of about 12%) across the RTO 12 region. While this might seem to be a generous sample given the size of the universe, caution must be exercised when extrapolating these results to the entire tourism sector of RTO 12.
- For the Labour Shortage statistics, the margin of error for a probability sample of similar size would be +/- 9.42% at the 95% confidence level. That is to say that 19 times out of 20 one would get a result that falls within that margin of error. At the 90% confidence level (9 times out of 10) the margin of error would be +/- 7.95%. When the size of the universe is small, as is the case here, a much larger sample size, relative to the overall universe is typically required. So, for example, to have achieved a typical margin of error of +/-2% would have required a sample size of 623 (out of a possible 841 completes) - which simply wasn't attainable for this study. So, when the full-time labour shortage is calculated to be 1,313, we are 95% confident the true number will lie somewhere between 1,190 and 1,437. As for the estimate for seasonal workers we estimate that figure to be 4,640 and we are confident that the true number will lie somewhere between 4,203 and 5,078.
- However, 96 is a good sample size to test hypotheses between proportions within this study. For instance, with the Confidence Index, one can compare with statistical significance those data points that rank high vs those that rank low. The mean Confidence Index of 60 (from a scale of 0 - 100) has a high level of confidence (95% confident) that it is within +/- 3% of the actual universe. So, for any future Confidence Index research we are confident that any deviation of the mean below 57 or above 63 would represent real change.

Respondent Profile (n=96)

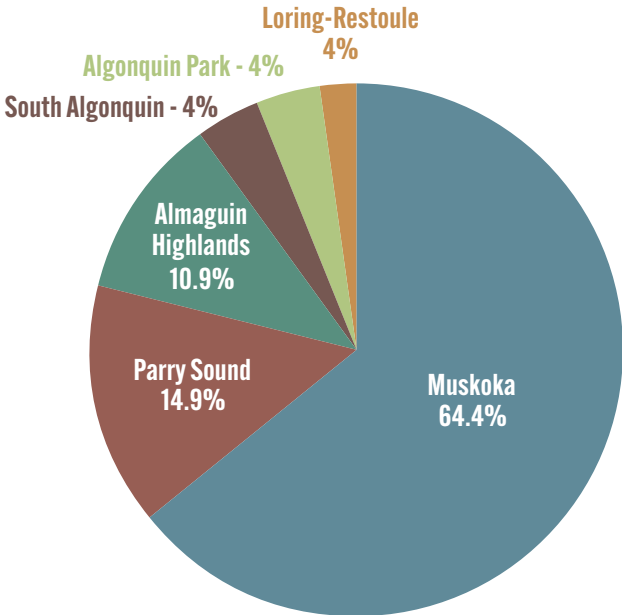
Respondents by Type of Business



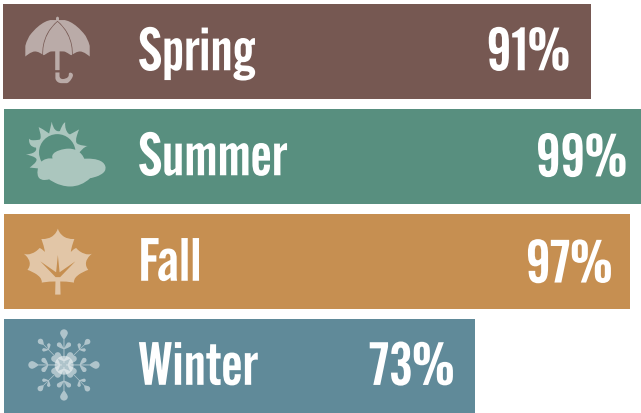
Respondents by Percent of Revenue from Tourism



Respondents by Location



Respondents by Season Open



80% of respondents say they are the owners of the business, with the balance being managers

70% of respondents say they accessed business access COVID relief funds (including, but not limited to CEWS TRF, CERS, etc.) in the past 2 years

Confidence Measures



Meeting Business Objectives

- A majority of respondents are optimistic that they will be able to meet their business objectives this season
- Respondents in Parry Sound are particularly optimistic (though sample size is 14 operators)
- Of operator types, respondents in the Food & Beverage sector are least likely to be extremely optimistic, and most likely to be extremely pessimistic

Thinking of the upcoming season, how optimistic or pessimistic do you feel about meeting your business objectives?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Extremely Optimistic	60%	58%	72%	60%	100%	-	74%
Extremely Pessimistic	12%	13%	-	15%	-	46%	26%

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
Extremely Optimistic	66%	100%	50%	40%	70%	100%	83%
Extremely Pessimistic	17%	-	7%	22%	-	-	-

Interpret results with caution due to small base sizes

Meeting Business Objectives

- 89% of respondents feel that their ability to achieve their business objectives has either stayed the same or improved [this year compared to last](#)
- While 41% of respondents in Muskoka say their ability has improved, only 26% of respondents in Parry Sound say the same, though none there say it has worsened
- Of operator types, respondents in the Food & Beverage sector are more likely to say their ability has improved, while those in the Accommodation sector least likely (though these differences are not statistically significant)

Compared to the same season last year, would you say ability to meet business objectives has...

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
IMPROVED	40%	41%	24%	60%	100%	-	26%
STAYED THE SAME	49%	44%	76%	40%	-	46%	74%
WORSENERD	12%	15%	-	-	-	54%	-

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
IMPROVED	27%	50%	46%	42%	48%	32%	-
STAYED THE SAME	56%	50%	37%	45%	52%	68%	100%
WORSENERD	17%	-	17%	13%	-	-	-

Interpret results with caution due to small base sizes

Meeting Staffing Needs

- Almost half of respondents are pessimistic that they will be able to properly staff this season
- Despite their optimism for meeting their business objectives, respondents in Parry Sound are particularly pessimistic about the ability to find staff
- Of operator types, respondents in the Food & Beverage sector are overwhelmingly pessimistic

Thinking of the upcoming season, how optimistic or pessimistic do you feel about meeting staffing needs (having the right number of staff for your business)

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Extremely Optimistic	32%	29%	24%	60%	-	46%	25%
Extremely Pessimistic	45%	45%	60%	6%	39%	54%	75%

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
Extremely Optimistic	41%	-	17%	7%	58%	65%	100%
Extremely Pessimistic	37%	50%	49%	68%	34%	35%	-

Interpret results with caution due to small base sizes

Meeting Staffing Needs

- 42% of respondents say their ability to properly staff this season has worsened
- Of respondents in Parry Sound, 60% say their ability to properly staff this season has worsened
- Of operator types, a clear majority of respondents in the Food & Beverage sector say their ability to meet staffing needs has worsened

Compared to the same season last year, would you say ability to meet staffing needs has...

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
IMPROVED	14%	15%	8%	29%	-	-	-
STAYED THE SAME	44%	43%	33%	56%	-	46%	74%
WORSENERD	42%	42%	60%	15%	100%	54%	26%

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
IMPROVED	11%	-	4%	22%	-	32%	37%
STAYED THE SAME	49%	50%	44%	16%	87%	32%	63%
WORSENERD	39%	50%	52%	62%	13%	35%	-

Interpret results with caution due to small base sizes

2021 Revenue / Sales Compared to 2020

- 40% of respondents say that 2021 was better 2020, which is not surprising given the Covid situation in 2020
- A clear majority of businesses in Parry Sound say 2021 was better
- 50% of F&B businesses say 2021 was actually worse than 2020

Thinking about your total revenue/sales in 2021, how does it compare to 2020? It is...

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
HIGHER	40%	40%	66%	31%	61%	-	-
SIMILAR	30%	30%	19%	25%	-	54%	74%
LOWER	30%	30%	15%	44%	39%	46%	26%

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
HIGHER	33%	50%	37%	33%	52%	100%	100%
SIMILAR	41%	-	28%	17%	39%	-	-
LOWER	25%	50%	36%	50%	8%	-	-

Interpret results with caution due to small base sizes

2022 Revenue / Sales Compared to 2021

- Businesses are bullish about sales this year, with 54% of respondents expecting them to be higher this year
- This sentiment is shared across the region
- Almost 70% of F&B businesses say 2022 will be better than 2021, while only 39% of accommodators say the same

How did you expect your revenue/sales in 2022 will be, compared to 2021? It will be...

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
HIGHER	54%	55%	42%	60%	61%	46%	75%
SIMILAR	36%	34%	54%	40%	39%	-	25%
LOWER	10%	12%	5%	-	-	54%	-

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
HIGHER	39%	50%	61%	67%	70%	68%	63%
SIMILAR	33%	50%	35%	33%	30%	32%	37%
LOWER	28%	-	4%	-	-	-	-

Interpret results with caution due to small base sizes

Debt Load

- According to the CFIB, in late 2021 average Canadian business increased its debt load due to pandemic restrictions and closures. This is especially true of businesses in the hospitality industry, where the amount of debt is now almost double the Canadian average
- RTO 12 is no different. 30% of respondents say their debt burden has increased over the past year. In light of recent interest rate hikes, this could foretell difficulties ahead for highly leveraged operators
- Only 12% of respondents say they will increase their debt this year

How has your level of debt changed compared to 12 months ago, if at all? My current debt has...

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
INCREASED	30%	23%	43%	34%	100%	54%	26%
STAYED THE SAME	60%	68%	38%	54%	-	46%	74%
DECREASED	10%	9%	19%	12%	-	-	-

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
INCREASED	24%	-	24%	38%	39%	-	-
STAYED THE SAME	76%	100%	65%	53%	61%	35%	63%
DECREASED	-	-	11%	8%	-	65%	37%

Thinking about this season, how do you expect your level of debt will change? My level of debt will...

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
INCREASE	12%	12%	-	-	39%	54%	25%
STAYED THE SAME	63%	67%	54%	69%	61%	46%	26%
DECREASE	25%	20%	46%	31%	-	-	49%

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
INCREASE	22%	-	7%	4%	25%	-	-
STAYED THE SAME	67%	50%	65%	74%	75%	-	63%
DECREASE	11%	50%	28%	22%	-	100%	37%

Good Time to Invest in Business?

- Despite the recent bad times, and the economic storms we will be weathering for some time to come, a majority of respondents are optimistic about the future and say they think now is a good time to invest in their businesses
- Respondents in Parry Sound are particularly bullish, with 84% saying it's a good time to invest

Would you say now is a good or bad time to invest in your business?

Region							
	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
GOOD TIME	58%	54%	84%	35%	100%	46%	75%
BAD TIME	7%	4%	7%	6%	-	54%	-
NOT SURE	36%	42%	9%	59%	-	-	25%

Type of Business							
	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Other
GOOD TIME	43%	-	56%	58%	83%	100%	100%
BAD TIME	14%	-	7%	4%	-	-	-
NOT SURE	43%	100%	37%	38%	17%	-	-

Interpret results with caution due to small base sizes

Limiting Factors

- Inflation preoccupies the Canadian consumer right now, and business operators in RTO 12 are no different. Fully 60% of respondents say rising prices – and rising fuel prices in particular – will limit their ability to achieve their business objectives
- Not only do a majority point to inflation as a limiting factor, over 80% of this majority say they have a very high level of concern
- These findings are consistent with those of the recent CFIB Business Confidence survey
- Lack of employees and increasing labour costs (the handmaiden of inflation) are also big concerns
- The pandemic was cited by only 37% of respondents, but among those who say this, 74% say the concern is high

Which of the following factors will limit your ability to meet your business objectives in the upcoming season, if any?

	% of Respondents	High Level of Concern (Top 2 Boxes)
Rising consumer inflation – prices in general	60%	81%
Rising consumer inflation – specifically gas prices	59%	85%
Lack of employees	55%	81%
Increase in the cost of labour	53%	81%
Supply chain issues	43%	73%
Lack of affordable housing in the region	41%	96%
The situation with respect to the pandemic	37%	74%
Low volume of visitors to the region	35%	61%
Lack of patronage from locals	25%	45%
The weather	22%	53%
Government restrictions/irrelevant programs/red tape	21%	62%
Increase in the cost of credit	9%	62%
Natural disasters such as floods and forest/wildfires	2%	50%

Interpret results with caution due to small base sizes

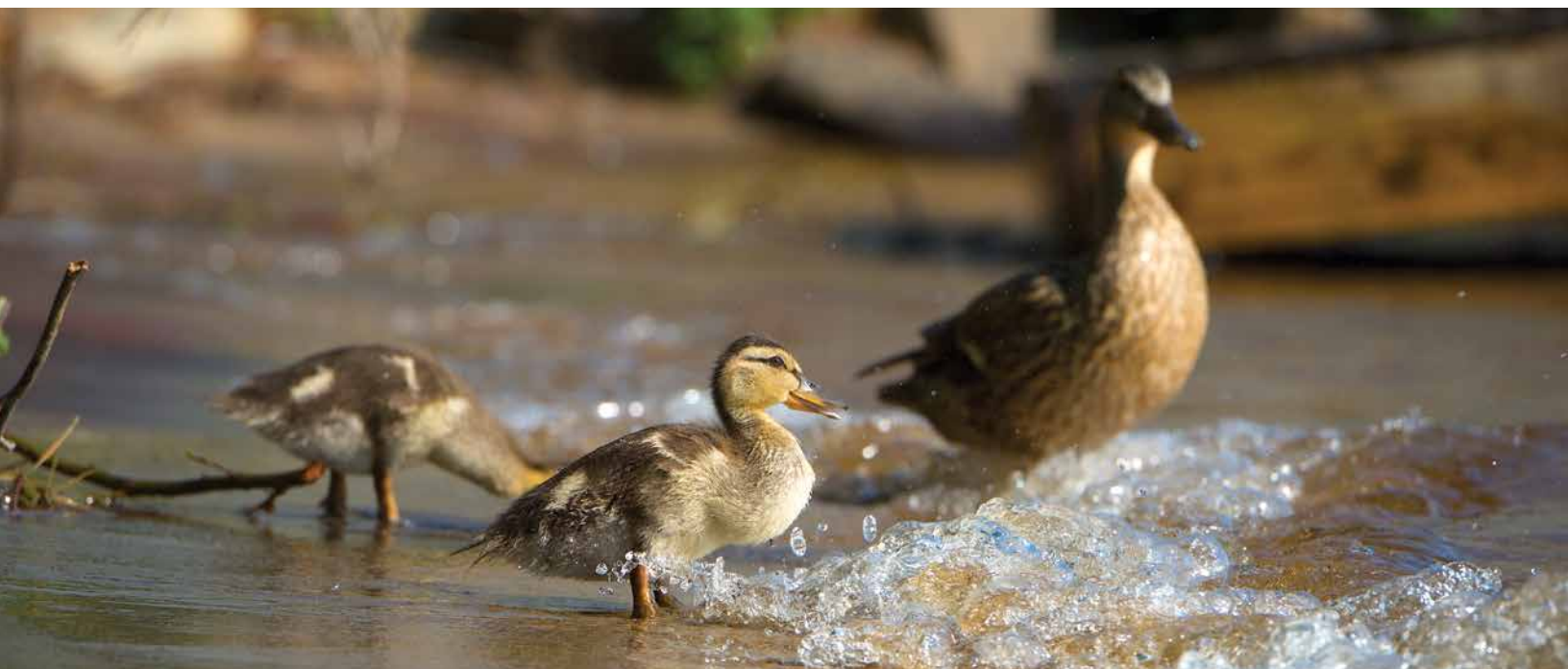
Confidence in Tourism Industry

- Tourism is the number one industry in RTO 12, and confidence in its ability to contribute to the local economy, grow visitation is very high and contribute to a healthy natural environment is high
- A majority of businesses believe the industry has the support of the local community
- When it comes to attracting staff, however, faith in the tourism industry is quite low, with 51% saying they are pessimistic about the industry's ability to do that

Thinking of the upcoming season, how confident are you in the ability of the tourism industry in the region to...

	Very Confident (Top 2 Box)	Very Pessimistic (Bottom 2 Box)
Contribute to the local economy	74%	4%
Grow visitation and spend	58%	15%
Contribute to a healthy natural environment	57%	10%
Have the support of the local community	55%	11%
Meet the demand of tourists to the region	45%	15%
Attract and retain quality seasonal temporary staff	15%	51%

Interpret results with caution due to small base sizes



Confidence in Tourism Industry

- Respondents are mostly ambivalent about the tourism industry’s performance over the past year, with a majority saying its ability to perform has stayed the same over the past year
- When it comes to attracting staff, however, respondents say the tourism industry’s performance has worsened, with 58% saying that is the case

Compared to the same season last year, would you say the ability of the tourism industry in the region to do each of the following has improved, worsened or stayed the same?

	Improved	Stayed The Same	Worsened
Grow visitation and spend	34%	51%	15%
Have the support of the local community	21%	69%	10%
Contributed to the local economy	29%	65%	6%
Contribute to a healthy natural environment	14%	77%	9%
Attract and retain quality seasonal/temporary staff	6%	37%	58%
Meet the demand of tourists to the region	12%	65%	23%

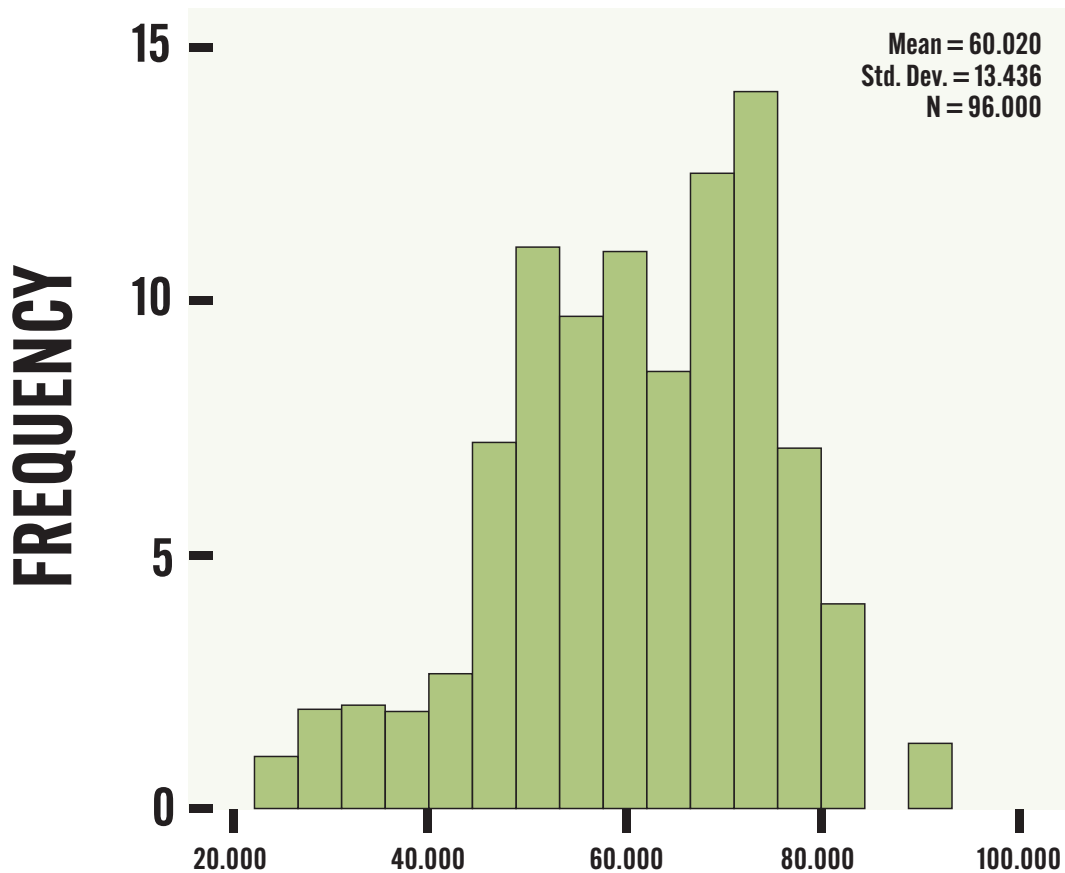
Interpret results with caution due to small base sizes



Business Confidence Index Methodology

- The RTO 12 Business Confidence Index is based on the inputs from 11 survey questions
- Each respondent was placed into a 5-point scale then added together. Then we transformed the scale into one that runs from 0-100 with 100 being complete confidence, zero having none. No respondents scored zero nor one hundred
- The scores range from 24 to almost 89
- We then arbitrarily assigned breaks to establish three groups: Low, Mid, High confidence, with low 0-49 scores, Mid 50-69 scores and high over 70

HISTOGRAM



Confidence Index 0-100

Business Confidence Index

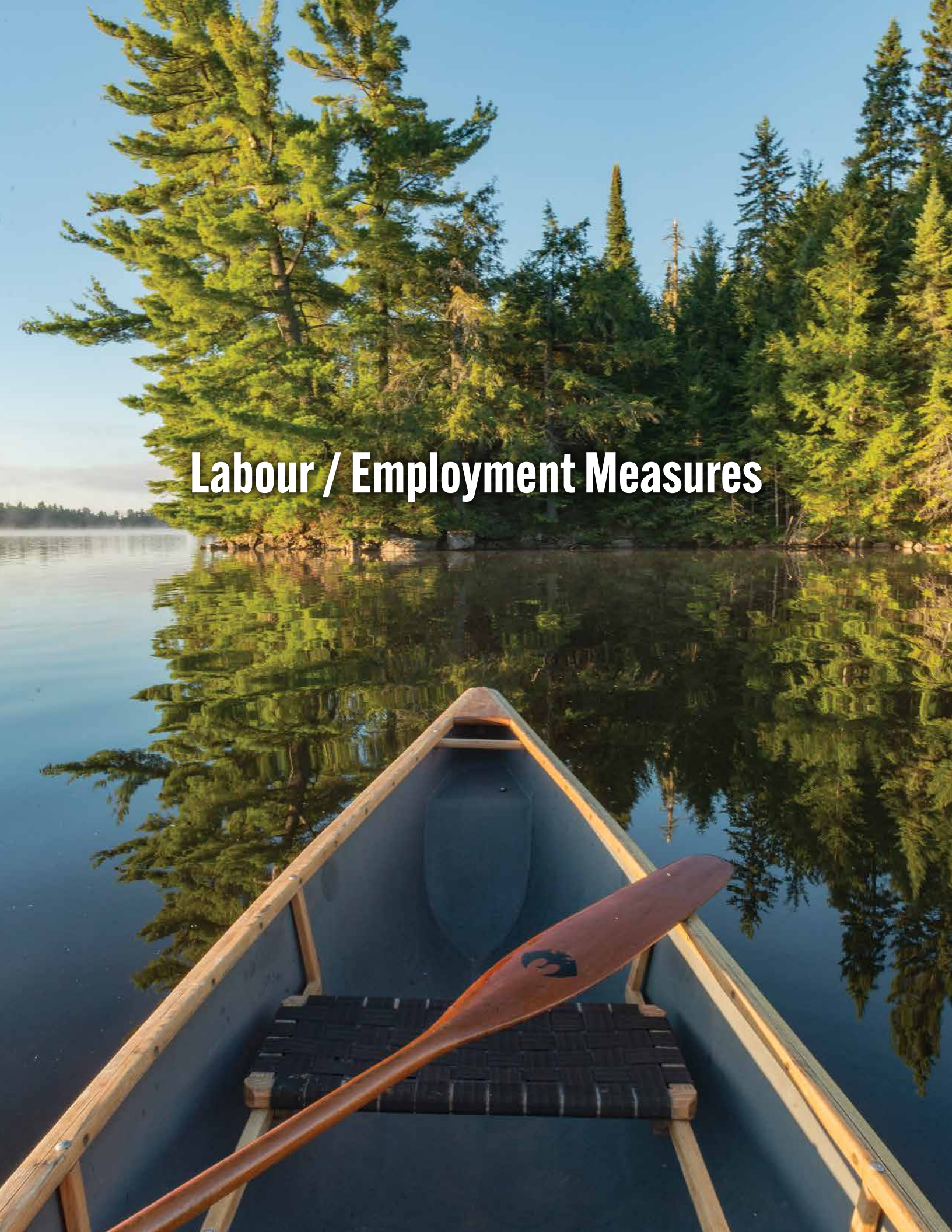
- The CFIB Business Barometer for May found that businesses are generally positive about their short term prospects with more owners expecting their business' performance to be stronger over the next three or 12 months than those expecting weaker performance
- Respondents in our survey are no different, with 79% feeling either mostly optimistic or very optimistic about the upcoming season. In Parry Sound, that proportion jumps to 93% (though the sample size is small)
- F&B operators are the least likely to fall into the High confidence category, and most likely to fall into the Low confidence category

Region		Confidence Index	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
HIGH	Optimistic about the economy, their business and a return to regular tourism	28%	30%	25%	25%	-	-	49%	
MID	Mostly optimistic for the future	51%	44%	68%	69%	100%	46%	51%	
LOW	Pessimistic about the economy and their business's future, particularly regarding staffing	21%	27%	7%	6%	-	54%	-	

Type of Business		Confidence Index	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
HIGH	Optimistic about the economy, their business and a return to regular tourism	33%	-	28%	13%	-	65%	31%	63%	
MID	Mostly optimistic for the future	46%	100%	51%	57%	75%	35%	52%	37%	
LOW	Pessimistic about the economy and their business's future, particularly regarding staffing	21%	-	21%	29%	25%	-	17%	-	

Interpret results with caution due to small base sizes

Labour / Employment Measures



Number of People Employed

- An overwhelming majority of respondents have fewer than 6 full and part-time employees
- In 2022, respondents indicate they will have an average of 8 full-time and 15 part-time or seasonal staff
- This represents a modest increase in staffing this year, with full-time complements increasing by 14%, and part-time by 7%

How many people employed including yourself?

	2021		2022	
	Full-time	Seasonal	Full-time	Seasonal
0 - 5	71%	70%	70%	69%
6 - 10	11%	11%	9%	7%
11 +	18%	19%	21%	23%
Average	7%	14%	8%	15%

Interpret results with caution due to small base sizes



Number of People Employed

- In 2022, businesses in Muskoka and Parry Sound will have similar numbers of staff. Respondents from the former indicate they will be hiring more people this year, while those from the latter fewer
- Accommodation and Golf operators have the largest staffing complement

Region							
How many people employed including yourself?	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
2021 Average Number Full-time	7	7	9	2	3	20	2
2021 Average Number Part-time/Seasonal	14	17	21	1	3	0	2
2021 Average Total	21	24	31	3	7	20	4
2022 Average Number Full-time	8	8	7	2	3	24	3
2022 Average Number Part-time/Seasonal	15	18	21	1	3	0	3
2022 Average Total	23	26	28	3	6	25	6

Type of Business								
How many people employed including yourself?	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
2021 Average Number Full-time	10	4	4	10	1	2	2	2
2021 Average Number Part-time/Seasonal	19	5	17	15	6	25	3	4
2021 Average Total	30	9	21	25	7	27	5	5
2022 Average Number Full-time	12	5	5	10	2	2	3	2
2022 Average Number Part-time/Seasonal	18	8	20	17	7	28	3	3
2022 Average Total	31	13	25	27	8	30	5	5

Interpret results with caution due to small base sizes

Number of Unfilled Positions

- On average, respondents indicate that they have 2 unfilled full-time positions, and 6 part-time.
- 57% of respondents indicate they have no shortage of full-time staff, while 40% said they have no shortage of part-time staff
- The shortage seems most acute in Parry Sound, where the shortfall is twice the overall average
- F&B operators reports the greatest shortages

Region								
How many unfilled full-time positions do you have right now for the upcoming 2022 spring/summer season?	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin	
	0	57%	58%	28%	90%	61%	46%	74%
	1 to 5	33%	39%	45%	10%	39%	0%	0%
	6 to 10	8%	3%	22%	0%	0%	54%	26%
	11 +	1%	-	5%	-	-	-	-
	AVERAGE	2	1	4	0	0	4	2

Type of Business								
How many unfilled full-time positions do you have right now for the upcoming 2022 spring/summer season?	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
	0	77%	50%	55%	29%	48%	65%	100%
	1 to 5	11%	50%	42%	28%	52%	35%	0%
	6 to 10	11%	0%	4%	17%	0%	0%	0%
	11 +	-	-	-	3%	-	-	-
	AVERAGE	1	1	1	3	1	0	0

Interpret results with caution due to small base sizes

Number of Unfilled Positions

Region								
How many unfilled part-time positions do you have right now for the upcoming 2022 spring/summer season?	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin	
	0	40%	42%	16%	73%	-	54%	25%
	1 to 5	43%	40%	48%	27%	100%	46%	75%
	6 to 10	5%	5%	10%	0%	0%	0%	0%
	11 +	12%	13%	26%	-	-	-	-
AVERAGE	6	6	12	0	2	0	1	

Type of Business									
How many unfilled part-time positions do you have right now for the upcoming 2022 spring/summer season?	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other	
	0	56%	50%	32%	22%	31%	32%	56%	63%
	1 to 5	34%	50%	48%	44%	69%	32%	34%	37%
	6 to 10	3%	0%	4%	19%	0%	35%	0%	0%
	11 +	6%	-	17%	25%	-	-	10%	-
AVERAGE	5	2	5	11	1	4	2	0	

Interpret results with caution due to small base sizes



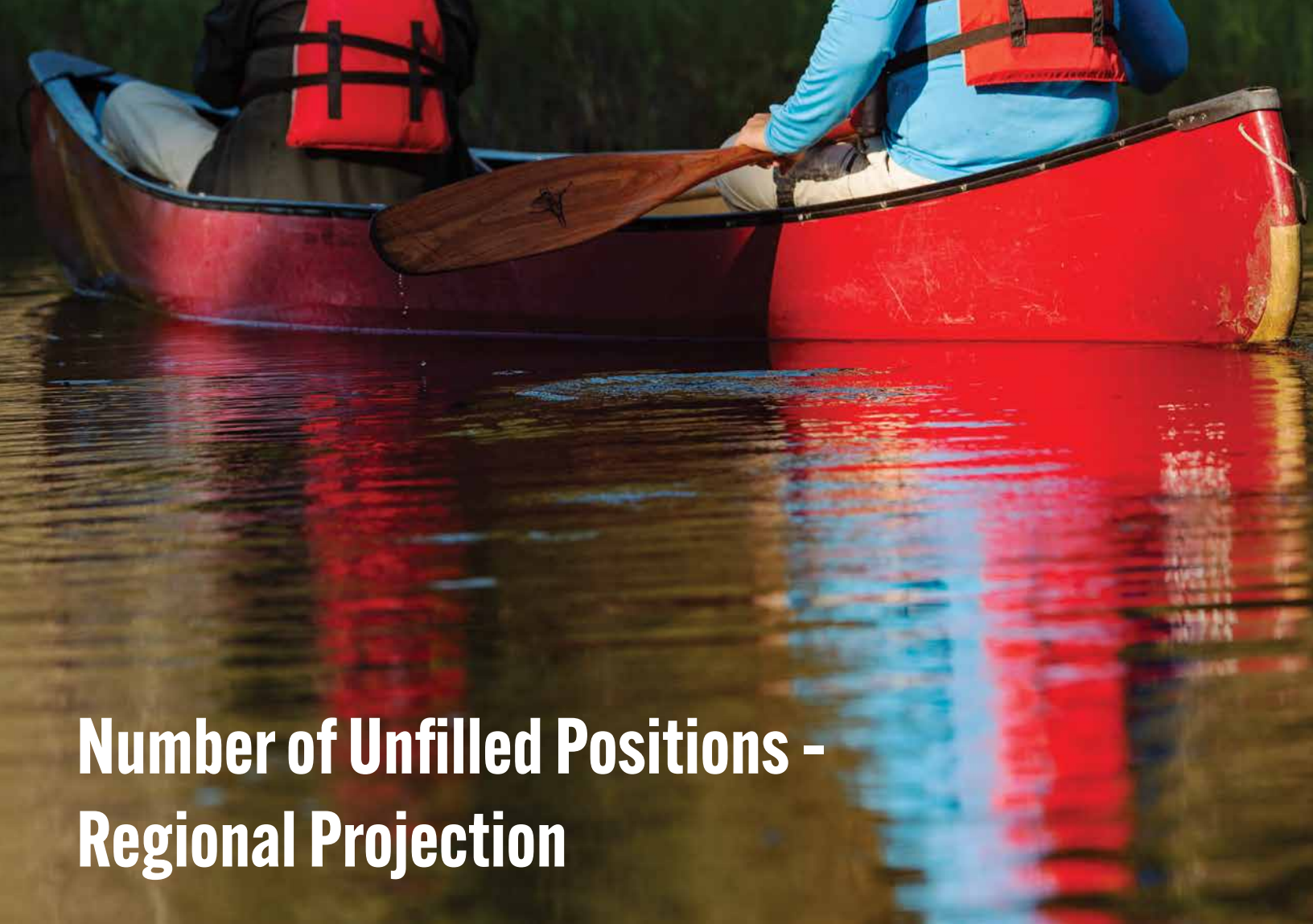
Confidence in Filling Open Positions

- Respondents seem divided when it comes to their confidence in filling their open positions
- The proportion of respondents who are optimistic about filling their full-time positions is equal to those who are pessimistic. There is less confidence when it comes to filling the part-time jobs
- Respondents in Parry Sound are particularly pessimistic as are operators in the F&B sector

Region								
How confident are you that you will fill these positions?		TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Full-time	Extremely optimistic (top 2 box)	38%	45%	5%	43%	-	46%	49%
	Extremely pessimistic (bottom 2 box)	37%	31%	76%	19%	-	56%	26%
Part-time	Extremely optimistic (top 2 box)	26%	32%	5%	25%	0	46%	-
	Extremely pessimistic (bottom 2 box)	42%	41%	43%	27%	61%	54%	75%

Type of Business									
How confident are you that you will fill these positions?		Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Full-time	Extremely optimistic (top 2 box)	49%	50%	55%	13%	-	65%	27%	100%
	Extremely pessimistic (bottom 2 box)	25%	50%	41%	68%	21%	35%	17%	-
Part-time	Extremely optimistic (top 2 box)	38%	-	24%	16%	-	32%	20%	63%
	Extremely pessimistic (bottom 2 box)	42%	-	50%	53%	30%	68%	30%	37%

Interpret results with caution due to small base sizes



Number of Unfilled Positions - Regional Projection

- For context, our respondents represent 11% of tourism operators, using the 2019 Destination Ontario data to estimate the total population of tourism employers:
- Using this data, third party research and our survey data, we estimate there are a total of 12 to 15K people employed in tourism sector in RTO 12
- According to Statscan's 2016 census data, there are at least 50K full and part-time employed persons (all sectors, including tourism) in the Muskoka Census Division and the Parry Sound Census District. Including other towns not in these Census areas, but within the RTO 12 catchment, and assuming 10% population growth since 2016, we estimate there are a total of 60K persons employed in RTO 12 in all sectors, with 20 to 25% employed in tourism
- Based on the weighted survey we estimate the following labour shortages in the region this year:
 - 1,300 full-time positions**
 - 4,600 part-time positions**
- Note that 42% of respondents say they have full-time vacancies, **with an average of 3.7 open positions**. 59% of respondents say they have part-time vacancies, **with an average of 9.3 open positions**
- However our survey had an outlier company that reported being short 16 full-time, and 134 seasonal vacancies. **If we remove that one establishment, the average of full-time open positions falls to 3.5 and part-time vacancies falls to 7.7**

Remuneration

- The average wage cited by respondents is roughly equal to the province's minimum of \$15.50
- Only 25% pay above \$20 per hour. The average wage in Parry Sound is 33% higher than the regional average
- Operators in the accommodation section pay the lowest wage, 20% lower than the average
- 26% of respondents say they have significantly increased remuneration over last year

What is the average hourly remuneration you will pay your entry level employees in 2022?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Less than \$15	20%	21%	-	57%	-	-	-
\$15 to less than \$20	55%	55%	57%	28%	100%	100%	51%
\$20+	25%	24%	43%	15%	-	-	49%
Average	\$15.31	\$15.03	\$20.12	\$8.54	\$16.22	\$17.16	\$18.61

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Less than \$15	38%	-	17%	13%	-	-	18%	-
\$15 to less than \$20	37%	50%	63%	70%	30%	100%	75%	37%
\$20+	25%	50%	20%	17%	70%	-	7%	63%
Average	\$11.98	\$21.00	\$15.66	\$16.42	\$21.15	\$16.79	\$13.76	\$18.50

Compared to the same season last year, how has the remuneration you pay your employees changed, if at all?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Significantly increased (top 2 box)	26%	33%	29%	6%	-	-	-
Significantly decreased (bottom 2 box)	2%	3%	-	-	-	-	-

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Significantly increased (top 2 box)	15%	-	38%	37%	8%	100%	30%	-
Significantly decreased (bottom 2 box)	7%	-	-	-	-	-	-	-

Employee Demographics

- The workforce for respondents in our survey skews older and female - almost 40% of employees are over 55, and 60% are female
- There's an interesting polarity when comparing accommodation to F&B providers: while females dominate in both, 54% of accommodation employees are over 55, versus just 15% of F&B employees

Region								
Percent of Employees	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin	
Male	40	41	33	50	34	50	20	
Female	60	59	67	50	66	50	80	
Under 25	19	21	26	6	8	3	9	
25-54	42	41	47	40	38	32	57	
55+	39	37	27	54	55	65	34	

Type of Business								
Percent of Employees	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Male	44	65	49	40	21	66	27	31
Female	56	35	51	60	79	34	73	69
Under 25	14	25	22	28	12	20	20	0
25-54	32	65	37	56	36	52	38	53
55+	54	10	41	15	52	28	41	47

Interpret results with caution due to small base sizes



Labour Market Dynamics

- Given respondents pessimism about recruiting their full staff complement, their feelings about the state of the labour market come as no surprise
- 53% say demand for employees has increased, while 51% say employee availability has decreased significantly. About half say the length of time to recruit has significantly increased. This is particularly true of the F&B sector

Compared to the same season last year, has your business seen change in the demand / competition for employees?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Significantly increased (top 2 box)	53%	53%	76%	21%	100%	54%	26%
Significantly decreased (bottom 2 box)	3%	3%	-	-	-	-	-

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Significantly increased (top 2 box)	37%	50%	67%	62%	69%	35%	51%	-
Significantly decreased (bottom 2 box)	-	-	-	8%	-	-	-	-

Compared to the same season last year, has your business seen change in the availability of employees?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Significantly increased (top 2 box)	10%	10%	29%	-	-	-	-
Significantly decreased (bottom 2 box)	51%	49%	64%	21%	100%	54%	100%

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Significantly increased (top 2 box)	8%	-	11%	11%	-	35%	7%	-
Significantly decreased (bottom 2 box)	42%	100%	61%	67%	52%	32%	44%	-

Interpret results with caution due to small base sizes

Labour Market Dynamics

Compared to the same season last year, has your business seen change in the length of time taken to recruit?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
Significantly increased (top 2 box)	49%	50%	64%	18%	100%	54%	26%
Significantly decreased (bottom 2 box)	9%	10%	5%	-	-	-	49%

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
Significantly increased (top 2 box)	36%	50%	50%	62%	69%	32%	51%	-
Significantly decreased (bottom 2 box)	7%	-	19%	8%	-	35%	7%	-

Employee Training

- A clear majority of respondents offer training to employees.

Offer employee training?

Region	TOTAL	Muskoka	Parry Sound and Area	Almaguin Highlands	Loring-Restoule	Algonquin Park	South Algonquin
YES	78%	76%	100%	56%	100%	100%	51%
NO	22%	24%	-	44%	-	-	49%

Type of Business	Accommodation	Transportation	Experiences	Food & Beverage	Tour Operator/Event Planner	Golf	Retail	Other
YES	48%	100%	83%	100%	100%	100%	64%	100%
NO	52%	-	17%	-	-	-	36%	-

Interpret results with caution due to small base sizes

Factors Affecting Recruitment

- Employee availability is the most significant factor affecting ability to recruit staff
- More than half of respondents say that access to affordable housing significantly impact their ability to recruit new staff. (Housing access and employee availability go hand-in-hand)
- A significant proportion say that the number of people who want to work in tourism businesses is also significantly impacting their ability to recruit

How are the following factors affecting your ability to hire employees?	Significantly Impact	Minimal Impact
Availability of potential employees in the region	72%	10%
Access to affordable housing for my staff	54%	23%
The number of people want to work in my specific type of business	41%	18%
Lack of government programs to grow / support the local workforce	38%	30%
The level of remuneration I am able to offer	36%	30%
The type of positions I have available	33%	31%
My location	32%	34%
Government restrictions / inadequate policies / red tape	29%	38%
The level of additional incentives I can offer beyond wage	28%	28%
Access to Temporary Foreign Workers	28%	48%

Interpret results with caution due to small base sizes



Recruitment Strategies

- Respondents say promotion of good working conditions is the most effective recruitment strategy, but only 12% tout that when recruiting
- Offering higher wages is seen as the second most effective way to recruit new staff with 59% saying it's highly effective, but only 24% say they use it as a recruitment strategy
- Online ads are the most used strategy with 37% using them, but only 28% say they are highly effective

What strategies did you use to attract employees, if any?	Percent Using	Percent Says Highly Effective
Local/online ads/Facebook	37%	28%
Trusted referral/word of mouth	28%	36%
Higher wages/incentives/bonuses	24%	59%
Job banks/other online career sites	19%	18%
Good working conditions/environment	12%	85%
Flexible schedule/hours	8%	57%
Agency/recruiters	6%	17%
College/university/high school job boards/recruitment	6%	37%

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