



The Impacts of COVID-19 on the Tourism Workforce in Canada

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Introduction: The Tourism & Hospitality Emergency Recovery Initiative (THER)

Since March 2020 tourism and hospitality has been the hardest-hit sector in terms of pandemic-related unemployment. In 2020, OTEC's Tourism & Hospitality Emergency Recovery initiative, with funding provided by the Future Skills Centre, focused on identifying and supporting the immediate needs of workers in this sector in Ontario – disproportionately consisting of vulnerable individuals including youth, women and newcomers to Canada.

In 2021, with the continued support of the Future Skills Centre, the scope of THER expanded nationally to address the immediate needs of workers, as well as supporting businesses in sector-based workforce recovery planning. OTEC engaged with new provincial partners in Saskatchewan, New Brunswick, and PEI to apply learnings from Tourism SkillsNet Ontario (TSNO) to the THER program and scale nationally.

THER encompassed three areas of focus – research and data insights, communications and technology, and business resources – each with dedicated workstreams. The research and data insights were used to inform communications and marketing campaigns, engage sector partners, and support sector recovery initiatives.

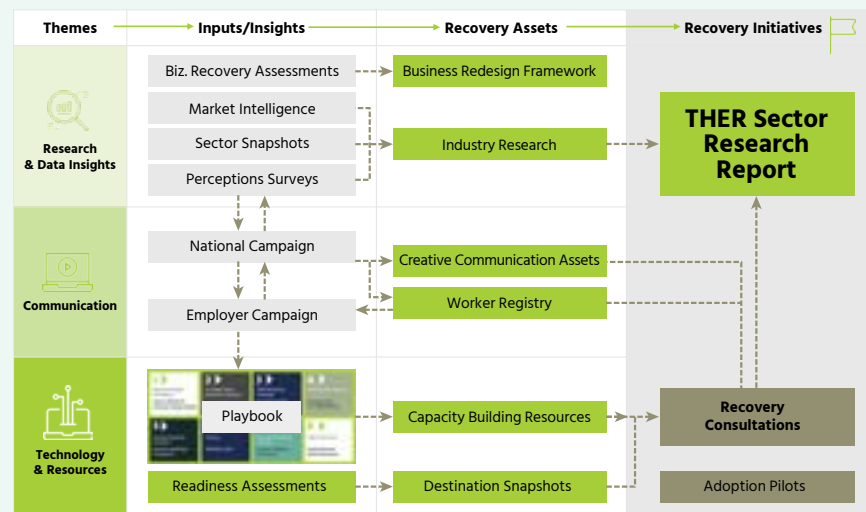
Project components included:

- Business recovery tools including sharing real-time labour market information, readiness assessments and regional workshops for businesses in Ontario, New Brunswick, PEI and Saskatchewan.
- A national worker recruitment ad campaign, garnering 250,000 visits to the THER website LetsGetReady.ca, in the last year.
- A THER community hub and worker registry to re-engage with workers and attract new workers through free skills training, resources and connections to the sector.
- CareerAtlas, a new AI-driven online platform to connect workers to jobs, training, and career coaching in the tourism and hospitality sector.

With a focus on destination-based recovery, OTEC worked with partners to curate economic and labour market data to support business decision-making at each stage of recovery. This included:

- conducting needs assessments with affected destinations to define recovery pathways;
- sharing capacity and resilience evaluation models developed through Tourism SkillsNet, and other networks in participating provinces and territories; and
- leveraging data to support business readiness assessments and redesign supports to better address the needs and human resources realities of local businesses.

Overview of Tourism & Hospitality Emergency Recovery



OTEC’s Collective Impact Approach

OTEC’s collective impact approach to Tourism & Hospitality Emergency Recovery has been fortified by strong partnerships with Tourism Industry Association of Ontario (TIAO), Tourism Industry Association of Canada (TIAC), Tourism HR Canada, Indigenous Tourism Ontario (ITO), Blueprint, Conference Board of Canada, Magnet, Ontario Restaurant Hotel and Motel Association (ORHMA), Hospitality Workers Training Centre (HWTC), Marriott International,

Tourism Saskatchewan, Hospitality Saskatchewan, Tourism Industry Association of Prince Edward Island (TIAPEI), Tourism Industry Association of New Brunswick (TIANB). It has been supported by Tourism SkillsNet Ontario (TSNO) – a provincial, industry-driven workforce development initiative actively engaging 19 destinations and 280 organizations.

Prepared by THER partner, Tourism HR Canada, this report provides a state of the industry overview of Canada's tourism industry workforce based on the analysis of labour market statistics and the results of primary research activities that were contributed by Tourism HR Canada to THER between December 2021 and March 2022.

OTEC has three decades of leadership in developing and delivering solutions to build workforce skills, capacity, and competitiveness in the Tourism and Hospitality sector.



OTEC's three decades of leadership in developing and delivering solutions to build workforce skills, capacity, and competitiveness in the Tourism and Hospitality sector, strongly positioned the organization to provide real-time rapid response to the complex effects of the pandemic. OTEC was well-positioned to connect and guide industry and community partners through research, technology, skills development and strategic opportunities for collaboration to develop resilience in the sector to address both the immediate needs of today as well as the new post-pandemic reality.

Executive Summary

This report provides an overview of the impact of the COVID-19 pandemic on employment in Canada's tourism sector, drawing on available labour force data and market intelligence to explore impacts on employment figures, labour demand and how perceptions of employment in the industry have changed.

While total employment across the Canadian economy has recovered to pre-pandemic levels, tourism employment was significantly suppressed in 2020 and 2021. Uncertainties heightened by the COVID-19 pandemic have driven labour shortages to a level that may threaten the ability of the sector to thrive as the industry looks toward economic recovery in 2022.

Canada's tourism industry was experiencing incredible growth prior to the onset of the global COVID-19 pandemic. In 2019, the industry accounted for over 2 million workers and it was projected that 504,000 jobs would need to be created between 2015 and 2035 in order to match labour demand. It was expected that the labour force would

While total employment across the Canadian economy has recovered to pre-pandemic levels, tourism employment was significantly suppressed in 2020 and 2021.



not be able to supply the full complement of workers required, leaving 93,000 of these jobs unfilled. Unfortunately, tourism was significantly impacted by travel restrictions, business closures and other public health measures that were enacted to protect the health care system from being overwhelmed in response to the global pandemic.

In 2020, during the height of the pandemic, employment in tourism fell to 1.62 million workers and the number of active tourism businesses in Canada rapidly fell by 21.9%. By 2021, employment rose just 2.2% to 1.66 million workers – 413,500 fewer than in 2019.



Although employment in the industry has recovered somewhat from its lowest point during the pandemic, by the end of 2021 – twenty-two months from the start of pandemic in Canada – the sector was still struggling to recover. The economic impact of the pandemic led to significant employment losses, which may act as a significant restraint on tourism’s recovery efforts.

Post-COVID, as demand for tourism services and products increases and international travellers return, reattracting the displaced workforce is a key priority for the sector. Stakeholders across the board are highly concerned that displaced workers will not return to the industry even when the pandemic is over, leading to labour shortages for operators. However, tourism provides a wide variety of full- and part-time, and seasonal career opportunities that provide significant employment advantages for Canada’s youth, newcomer and Indigenous populations.

The report concludes with a series of brief policy recommendations to help mitigate the negative impacts of tourism labour force shortages as part of a broader toolkit that will help employers address workforce recovery needs.

Impact of COVID-19 on the Tourism Sector in Canada

Tourism is one of Canada’s largest sectors in terms of employment. In 2019, there were 2,076,100 full-year jobs in the tourism sector, accounting for 9.8% of all full-year jobs in Canada.¹ These include all jobs within the tourism sector’s five industry groups: accommodations, food and beverage services, recreation and entertainment, transportation and travel services.

Tourism is principally defined by the United Nations as the activity of visitors — travellers taking a trip to a main destination outside of their usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.² The tourism sector is made up of those industries that supply tourism products and receive a significant share of their revenue from tourists.³

Tourism demand had been growing significantly up to 2019. Nationally, tourism contributed \$43.7 billion in Gross Domestic Product (GDP), up 3% from the previous year accounting for 2.03% of Canada's total GDP in 2019.⁴ Prior to COVID-19, government revenue (at all levels) attributed to domestic and international tourism was \$28 billion, of which \$8 billion was from international tourists.⁵

International visitors continued to be a growing, valuable market segment, after declining during the first 15 years of the 21st century. That decline had been driven by events such as 9/11 and the subsequent hardening of the border with the United States, SARS, and the financial crisis. Arrivals began to rebound in 2015, and steadily rose throughout the remainder of the decade. In 2019, Canada welcomed a record 22 million overnight visitors, who spent \$21.96 billion.⁶

More tourists arrived in Canada in the first two months of 2020, than arrived between March 2020 and July 2021.⁷



When international borders began to close in March of 2020, arrivals plummeted. More tourists arrived in Canada in the first two months of 2020, than arrived between March 2020 and July 2021.⁷ The years 2020 and 2021 were incredibly difficult ones for tourism operators and tourism employees in Canada. International tourism demand fell drastically, and domestic tourism demand was also significantly curtailed. Even local spending on tourism goods and services fell in the face of public health restrictions. In the first two months of the pandemic, the number of active tourism businesses fell by 21.9%⁸, and Gross Domestic Product within tourism industries fell to 42% of what it had been in January 2020.⁹

Travellers

With the border closed, international travel to Canada remains extremely low when compared to 2019 (Figure 1). For seventeen months, from March 2020 until August 2021, international visitation to Canada was essentially non-existent. While domestic tourism demand fell by 36.9% in 2020 compared to 2019, foreign demand fell by 81.8%.¹⁰ The border did reopen to Americans in August 2021 and other international travellers in September (Figure 2). This resulted in an increased number of travellers arriving in Canada, but the number of arrivals remained much lower than before the pandemic. The number of international travellers arriving in September 2021 was 81.3% lower than in September 2019.¹¹ The border reopening also occurred in early autumn, a time when the number of visitors to the country starts to decrease. In addition, more stringent testing requirements for travellers were implemented in December, further limiting arrivals.

Figure 1
Monthly International Tourist Arrivals in Canada – Seasonally Adjusted¹²

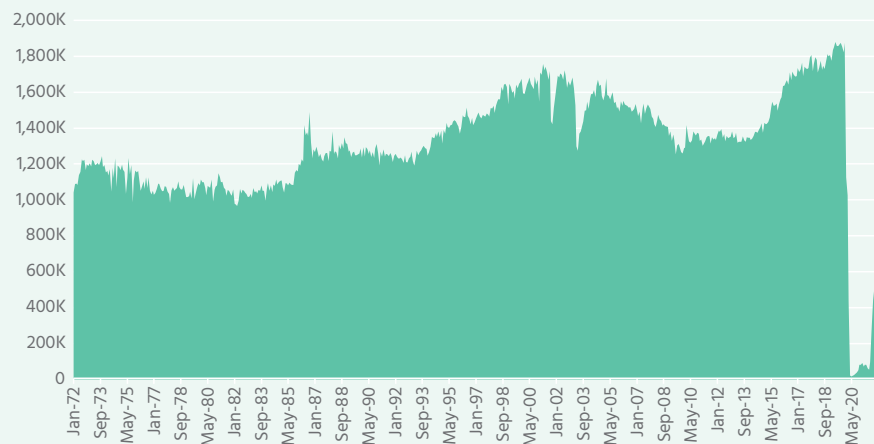
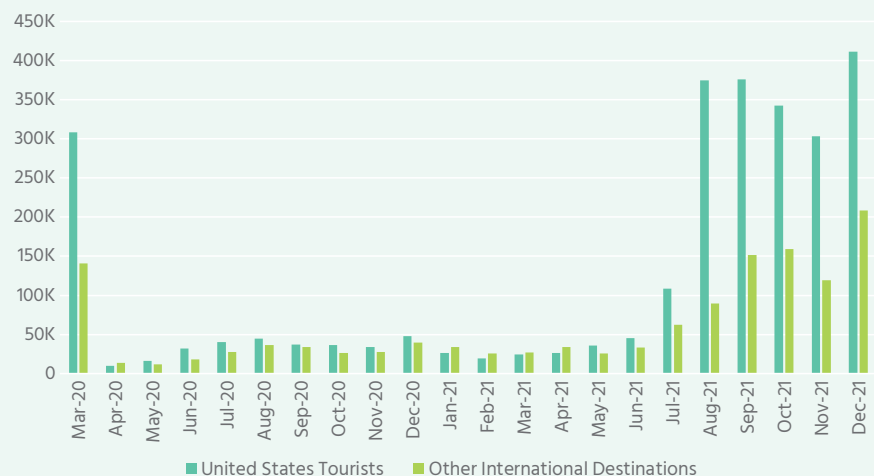


Figure 2
International Arrivals Monthly March 2020 to December 2021 – Seasonally Unadjusted¹³



International tourism demand remains highly seasonal. The preceding two charts tracked seasonally adjusted overnight tourist arrivals. Seasonally adjusted data smooths out seasonal variance in the data and makes long-term trends more visible. Figure 3 shows unadjusted data on the number of international tourists arriving in Canada since 2016. The summer peak is clearly visible. This peak matters greatly to the tourism sector, as the “recovery” in the early fall is occurring just as the total number of arrivals starts to decrease. Because the border has reopened the number of arrivals may continue to increase each month, but it is still occurring in a period when the number of arrivals is historically low. A true resurgence in demand would not likely occur until the summer of 2022 at the earliest.

Figure 3
International Arrivals
Monthly – Seasonally
Unadjusted¹⁴



Gross Domestic Product

The pandemic significantly depressed economic activity within tourism related industries. To compare Gross Domestic Product (GDP) in tourism related industries to GDP for the entire economy, in Figures 4 and 5 below GDP levels as of January 2020 were set to 100%, and each subsequent month represents GDP as a percentage of January 2020 levels. Across the entire economy, GDP fell to 83% of January levels in April of 2020. GDP then recovered to 99% of pre-pandemic levels by March of 2021, before falling back slightly and finally exceeding pre-pandemic levels of economic activity by October of 2021.

Economic activity within tourism related industries fared far worse. GDP in tourism related industries fell to 42% of the level seen in January 2020, and for some industries, such as air transportation, it was much worse (see Figures 4 and 5). Heading into the summer of 2021, economic activity in tourism related industries was only 58% of pre-pandemic levels and as of October 2021, remained 24.4% lower than in January 2021.¹⁵

Figure 4
Gross Domestic Product – All Industries and Tourism Related Industries January 2020 to November 2021 - National¹⁶

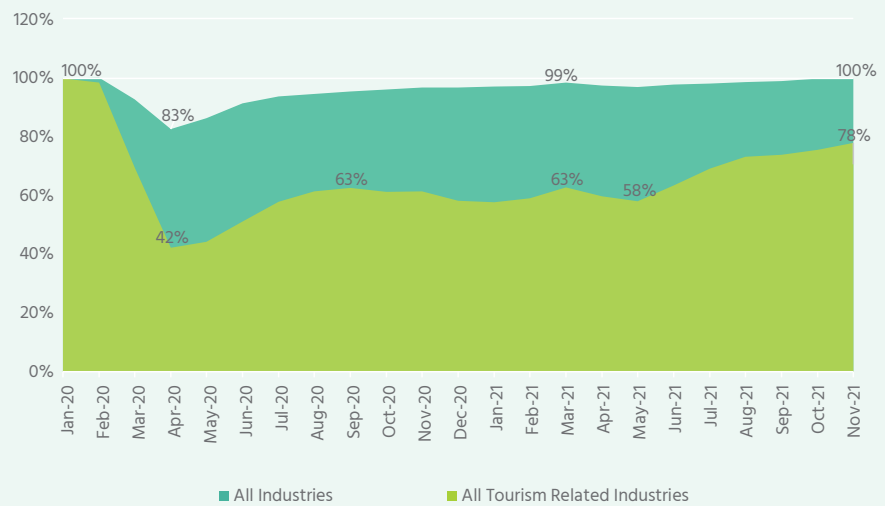
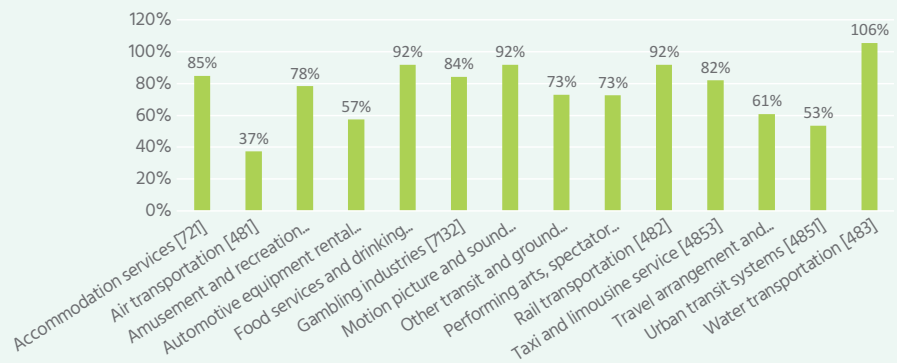


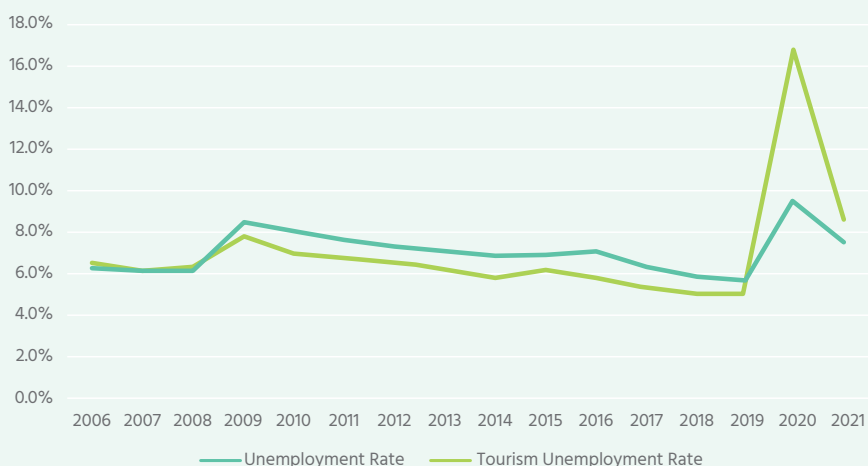
Figure 5
GDP of Tourism Related Industries – November 2021 as a Percent of January 2020¹⁷



The Impacts of the COVID-19 Pandemic on Employment in Canada’s Tourism Sector

Since 2008, the tourism industry had maintained a lower annual unemployment rate than the overall Canadian economy (Figure 6) and faced a consistent shortage of available workers.

Figure 6
Unemployment Rate and Tourism Unemployment Rate (seasonally unadjusted)¹⁸



Before the COVID-19 pandemic, the Conference Board of Canada estimated that spending in Canada’s tourism sector would grow to over \$338 billion in 2035 up from nearly \$220 billion in 2015. Such growth would have required 504,000 jobs to be created between 2015 and 2035.

In 2019, long-term projections of demand for tourism jobs compared to the available supply of labour estimated that by 2035, 93,000 tourism jobs that could have existed due to demand would go unfilled because the Canadian labour force would not be able to supply enough workers to fill those jobs.¹⁹ The projected lack of workers meant that some of the potential customer demand would go unfilled. Leaving all 93,000 jobs unfilled would have resulted in \$10.1 billion of potential spending within the tourism sector being left on the table.

Before the pandemic, the total demand for tourism jobs was expected to grow 22.0% between 2019 to 2035. By occupation, growth ranged from 14.5% for food and beverage servers to 38.8% for air transport ramp attendants (Figure 7).

Figure 7

Growth in Job
Demand – Select
Tourism Occupations²⁰

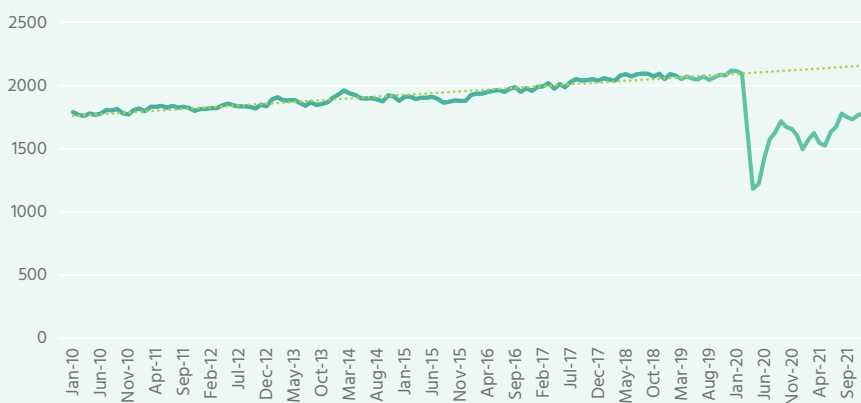
Tourism Occupation	Demand Increase 2019 to 2035
Air Transport Ramp Attendants	38.8%
Food Service Supervisors	38.4%
Delivery Drivers	37.3%
Recreation and Sport Program and Service Directors	33.3%
Program Leaders and Instructors in Recreation and Sport	31.4%
Attendants in Amusement, Recreation and Sport	30.5%
Chefs	29.6%
Retail Trade Managers	29.1%
Air Pilots, Flight Engineers and Flying Instructors	28.5%
Technical Occupations Related to Museums and Art Galleries	27.9%
Travel Counsellors	27.6%
Restaurant & Food Service Manager	27.2%
Light Duty Cleaners	26.2%
Hotel Front Desk Clerks	26.1%
Janitors, Caretakers and Building Superintendents	25.5%
Bakers	25.2%
Taxi and Limousine Drivers and Chauffeurs	24.8%
Transportation Managers	24.5%
Motor Vehicle Mechanics, Technicians and Mechanical Repairers	23.8%
Bus Drivers and Subway and Other Transit Operators	23.7%
Accommodation Service Managers	23.0%
Casino occupations	22.9%
Security Guards and Related Occupations	22.4%
Maîtres d'hôtel and Hosts/Hostesses	21.7%
Railway Conductors and Brakemen/women	20.4%
Railway and Yard Locomotive Engineers	19.9%
Pursers and Flight Attendants	19.5%
Food Counter Attendants and Kitchen Helpers	19.2%
Retail Salespersons and Sales Clerks	19.1%
Landscaping and Grounds Maintenance Labourers	19.1%
Aircraft Mechanics & Aircraft Inspectors	19.0%
Airline Sales and Service Agents	19.0%
Cooks	18.5%
Bartenders	18.3%
Cashiers	15.9%
Food and Beverage Servers	14.5%



Unfortunately, in the first two months of the pandemic, 880,000 tourism workers lost their jobs and the tourism unemployment rate reached 30%. Although employment in tourism started to recover and never fell so low again, what followed was repeated rounds of employment losses in reaction to additional public health orders. Over time, these former tourism workers began finding jobs in other industries. This led to a long-term loss of workers within the tourism sector.

By 2021, there were 1.66 million tourism employees – 413,500 fewer than there were in 2019 (Figure 8). Tourism is a highly seasonal industry with natural peaks and low periods of employment. In 2021, the tourism sector employed a range of between 300,000 (August) to 600,000 (January) fewer workers each month than it did in 2019. On average, compared to the same month in 2019, over 414,000 fewer individuals worked in the tourism sector each month.

Figure 8
Monthly Tourism Employment and Trendline for January 2010 to February 2020 (seasonally adjusted)²¹



As they began to restaff in the summer of 2021, many tourism businesses could not find the workers they needed. The restaurant industry, which can draw on local demand to a greater degree than other tourism industries, was particularly hard hit. Stories about labour shortages have featured prominently in the media. A Tourism HR Canada survey conducted in March 2021 found 55.8% of food and beverage businesses expected that an inability to hire staff would negatively

affect their business in the summer of 2021.²² The summer proved even more difficult than expected. A survey by Restaurants Canada found that 80% of respondents were having difficulty finding back-of-house staff, and 67% were having difficulty filling front-of-house positions.²³

Job postings for tourism-related positions shot upwards in 2021 compared to 2019. Job postings for many occupations found in the tourism sector were 50% higher in June to August of 2021 than in 2019 (Figure 9).

Figure 9

Change in Job Postings by Select NOC Code Third Quarter 2019 to Third Quarter 2021²⁴

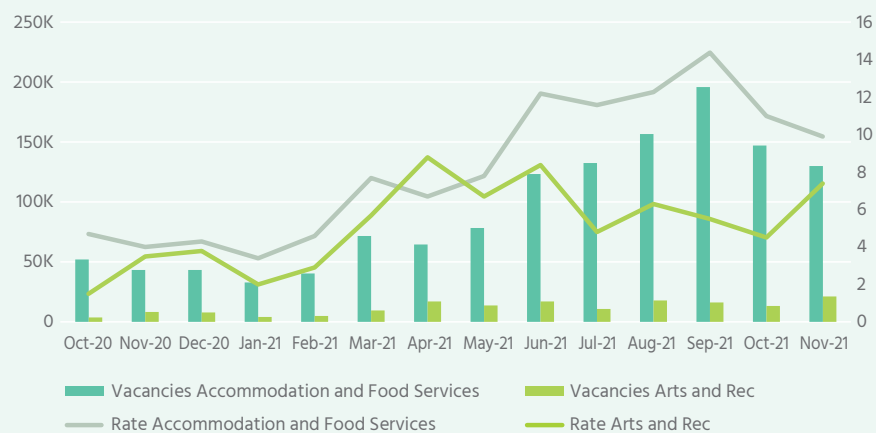
Tourism Occupation	Q3 2019	Q3 2021	Change
Janitors, caretakers and building superintendents	2,300	5,700	147.8%
Operators and attendants in amusement, recreation and sport	220	370	68.2%
Bus drivers, subway operators and other transit operators	660	1,100	66.7%
Maitres d'hôtel and hosts/hostesses	920	1,500	63.0%
Bartenders	1,500	2,400	60.0%
Light duty cleaners	5,900	9,200	55.9%
Support occupations in accommodation, travel and facilities set-up services	110	170	54.5%
Delivery and courier service drivers	6,300	9,400	49.2%
Executive housekeepers	220	300	36.4%
Pursers and flight attendants	30	40	33.3%
Food and beverage servers	4,300	5,700	32.6%
Other customer and information services representatives	14,600	19,200	31.5%
Cashiers	6,600	8,500	28.8%
Airline ticket and service agents	110	140	27.3%
Casino occupations	40	50	25.0%
Food service supervisors	4,500	5,500	22.2%
Accommodation, travel, tourism and related services supervisors	240	290	20.8%
Tour and travel guides	50	60	20.0%
Food counter attendants, kitchen helpers and related support occupations	9,800	11,500	17.3%
Restaurant and food service managers	3,200	3,700	15.6%
Cooks	16,200	18,600	14.8%
Hotel front desk clerks	2,200	2,500	13.6%
Retail salespersons	25,900	27,300	5.4%



Vacant positions within tourism related sectors increased dramatically over the summer (Figure 10). While vacancy data is not available for all industries within tourism, it is available for the accommodation and food service sector and the arts, entertainment and recreation sector. Job vacancies in those sectors have risen to historically unprecedented levels, as employers sought to replace the long-term, year-round workers who have been lost.

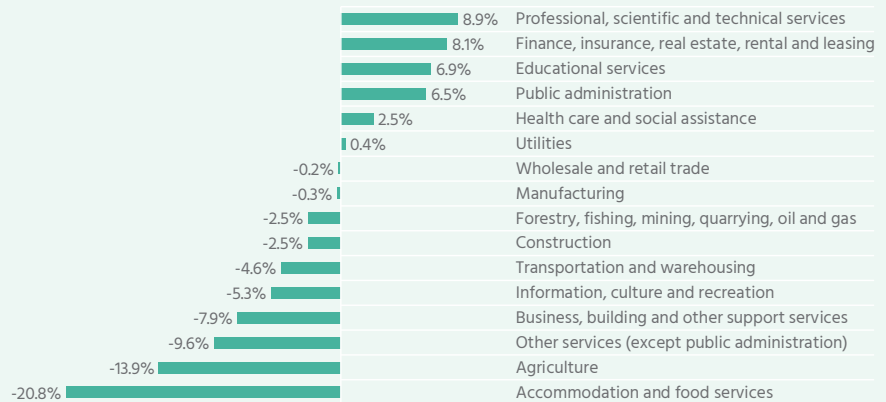
In July, there were over 130,000 vacant positions in the accommodation and food services sector. The vacancy rate²⁵ in that sector was 11.6%. By September, vacancies had almost reached 200,000 and the vacancy rate stood at 14.0%. Throughout the summer, there was more than one empty position for every 10 employed workers, in the accommodation and food services industry.

Figure 10
Vacancies and Vacancy Rate in Tourism Related Sectors²⁶



While it is difficult to put an exact figure on how many workers have permanently left the tourism industries, we know that more people are employed in the Canadian economy overall than prior to the pandemic. Workers who lost their jobs due to COVID-19 have moved to other sectors (Figure 11), making it very difficult for recovering industries, like tourism and hospitality, to find new workers.

Figure 11
Employment Change by Industry 2021 to 2019²⁷



During the summer of 2021, the number of people who were not active in the labour market, or were unemployed, was elevated. This created some slack within the labour market that tourism businesses could potentially tap into. Today, the number of unemployed workers has dropped to pre-pandemic levels. The percentage of people who are not actively participating in the labour force (e.g., not employed or actively looking for work) is also lower except among people over 65.

During the summer of 2021, the number of people who were not active in the labour market, or were unemployed, was elevated.



This presents a very significant challenge for the sectors of the economy—like tourism—that still need to restaff. The slack that existed within the labour market is gone. The number of vacancies reported by tourism businesses indicates the scope of the problem.

The accommodation and food services sector faced unprecedented vacancies in the summer and fall of 2021 (Figures 12 and 13). There were almost 200,000 vacant positions in that sector in September. The vacancy rate—the number of vacant positions as a percentage of total positions—was above 14.0%. No other industry comes close to a vacancy rate that high.

Figure 12
Total Vacancies and Vacancy Rate in Tourism Related Sectors October 2020 to November 2021²⁸

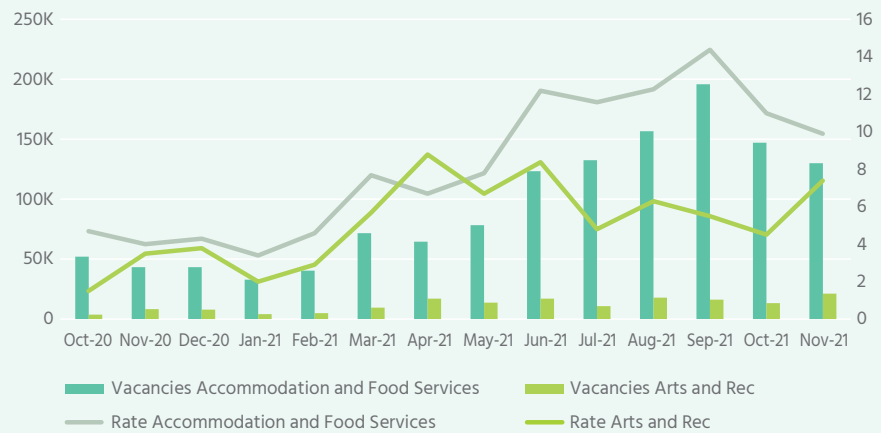
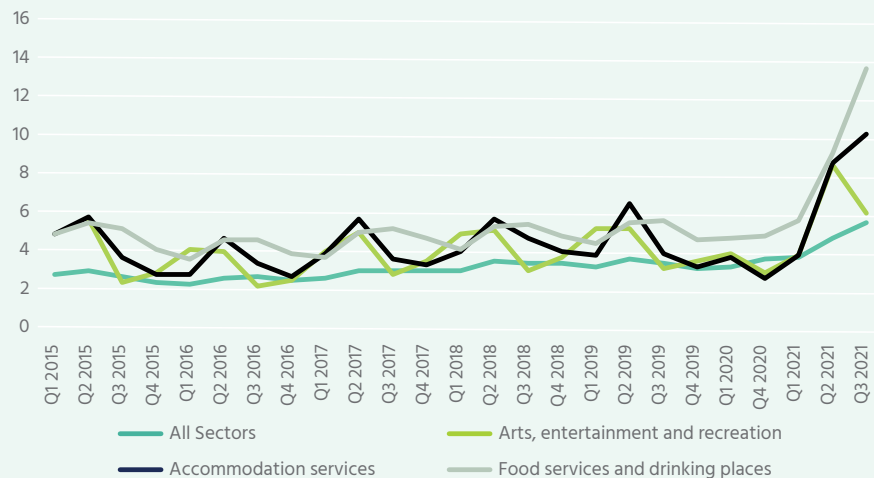


Figure 13
Total Vacancies and Vacancy Rate by Sector – November 2021²⁹



These shortages are historically unprecedented. Since 2015, when Statistics Canada began collecting data on job vacancies by quarter, the vacancy rate for tourism-related sectors had only gone above 6.0% once before 2021 (Figure 14).

Figure 14
 Vacancy Rates in Tourism
 Related Sectors by
 Quarter 2015 to 2021³⁰



Over the summer of 2021, many specific tourism-related occupations faced severe shortages. There were 34,000 vacant food server positions, 31,500 vacant positions for cooks and almost 17,000 for light-duty cleaners (i.e., housekeepers).

Over the summer of 2021, many specific tourism-related occupations faced severe shortages.



Total vacancies are only part of the story because some occupations employ more people than others. For example, there are fewer vacant food service supervisor positions (8,500) than vacant food server positions (34,000). But there are 80% fewer food service supervisors.

Using data from the 2016 Census, we calculated a vacancy rate for each occupation. In other words, the percentage of positions that were unfilled (Figure 15). The smaller number of vacancies for food service supervisors made up a much larger percentage of all positions. In the summer of 2021, 1 out of 5 food service supervisor positions went unfilled.

Figure 15
Total Vacancies and Estimated Vacancy Rate by Occupation Third Quarter 2021³¹

	Total Vacant Positions	Vacancy Rate (based on census 2016)
Food counter attendants, kitchen helpers and related support occupations	70,410	19.7%
Food and beverage servers	34,180	16.1%
Cooks	31,445	14.9%
Light duty cleaners	16,875	7.2%
Food service supervisors	8,545	21.1%
Maitres d'hôtel and hosts/hostesses	4,365	16.5%
Bartenders	4,265	11.1%
Chefs	3,815	6.5%
Restaurant and food service managers	3,810	3.0%
Operators and attendants in amusement, recreation and sport	3,035	11.4%
Hotel front desk clerks	2,300	11.1%



By the end of Q3 2021, public health measures were eased due to widespread vaccination and the overall labour force in Canada had started to return to pre-pandemic norms. The tourism industry saw unexpected employment gains in November 2021 which held steady into the holiday season. These gains were short-lived as rising COVID-19 case counts and the emergence of the Omicron variant resulted in increased public health measures in most provinces in mid-December 2021. This was felt quite heavily on employment across the entire economy. Unadjusted tourism employment data from the Labour Force Survey reveals a decrease in January 2022 of 176,000 workers from the previous month; a 10.1% month-over-month decline. Total unadjusted employment for January 2022 was 1,567,300 — down from 1,743,300 the month before.



While international tourism is expected to recover more slowly than domestic travel, Destination Canada expects that international tourism may not recover to 2019 levels until after 2025, while domestic travel should recover by 2024.³²

The Path to Tourism Industry Recovery

Tourism Demand Outlooks

Labour force recovery in the tourism industry rests on the return of customer demand. Those segments of the tourism sector which can draw on locals rather than tourists for revenue will see customer demand recover faster. This was the case for the restaurant industry in the summer of 2021 and it resulted in severe labour shortages.

International tourism is expected to recover more slowly than domestic travel. Destination Canada expects that international tourism may not recover to 2019 levels until after 2025, while domestic travel should recover by 2024.³² Comparatively, the Conference Board of Canada's travel markets outlook is more optimistic, with domestic travel expenditures recovering by 2023, but international travel only reaching 2019 levels in 2024.³³

Destination Canada's June 2021 *Visitor Economy Forecast* projected that potential travel demand will be high upon the loosening of global travel restrictions because many travellers have accumulated savings during the pandemic. With the border reopening, a burst of pent-up travel demand was expected from immunized residents in countries with low case counts. This outlook was based on an assumption of very high levels of economic growth, due to the expansion of vaccination programs in 2021—albeit with some restraining of economic growth in regions with slow vaccination rollouts.³⁴

The most likely scenario outlined in Destination Canada's outlook, is one in which inter-provincial travel resumes gradually. The more optimistic outlook saw all borders gradually reopen in August and predicted that the pent-up demand will see tourism expenditures surge back to 79% of 2019 levels in 2022, 90% in 2023, and fully recovering to pre-pandemic levels in 2025. Domestic travel will rebound by 2024 and could rebound as early as 2023 if the pandemic pushes Canadians to replace outbound travel with travel within the country.

The reality was that the border reopened to American travellers only, who had been fully vaccinated at least 14 days prior to entering Canada, on August 9th. On September 7th, the border did reopen to any fully vaccinated travellers who had completed the full course of vaccination with a Government of Canada-accepted vaccine at least 14 days prior to entering Canada³⁵. This suggests that Destination Canada's optimistic outlook remains plausible. However, due to the emergence of the Omicron COVID-19 variant in Canada, there remain high levels of uncertainty for recovery in 2022.

International tourism faces a longer path to recovery. It is expected to be constrained over the short-term. Even under the most optimistic scenario, international tourist demand only reaches pre-pandemic levels by 2025, and under the most likely scenario spending could be \$2 billion lower in 2025 than in 2019.

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The positive outlook may not materialize should unvaccinated populations—including the vaccine hesitant—around the world act as a source of new variants. To avoid a slower recovery, there must be high uptake of vaccines in Canada's key tourism markets. New cases must remain low, and barriers to travel must be gradually lowered in response. The emergence of the Omicron variant showed how real those risks were. That said, the potentially milder effects of the variant, combined with extremely high transmissibility, could mean that the restrictions put in place to combat it, could also disappear relatively quickly.

Despite the potential for significant pent-up demand to be released at once, tourism business operators must take into account a number of factors. The reopening will occur in stages across the globe and simply because Canada's borders are open does not mean residents of all countries will enter Canada. For example, Chinese travellers are unlikely to take international trips due to difficulties associated with quarantines when returning to their own country—something over which Canada has no control. Markets may open and close abruptly (as the South African market briefly did). In these conditions, all parts of the industry must be prepared to react to the unexpected and will be exposed to risks associated with trip cancellations for some time.

The Conference Board of Canada's tourism outlook for 2021 is more optimistic than Destination Canada's. The Conference Board expects domestic visits will exceed 2019 levels in 2023. Tourism expenditures are also expected to recover by 2023. Visits from American travellers will fully recover by 2023, and visits from other overseas markets will hit pre-pandemic levels by 2024.³⁶ Those provinces that rely more on international travellers will see a slower recovery. The outlook also sees destinations that people can travel to by car recovering more quickly than those that rely on air transportation. While many Canadians planned to travel in 2021, most planned to travel by car and avoid air travel.



One key aspect of the forecast is Canada's ability to potentially capture more American travellers who, pre-COVID, may have opted for other destinations. This is driven by the perception of Canada as a safe destination, combined with the weakening of the Canadian dollar. Those provinces with attractions close to the American border will benefit the most.

As with the Destination Canada outlook, the Conference Board of Canada foresees some risks to its forecast. Variants of the COVID-19 virus are viewed as a threat should they undermine vaccination efforts. Labour is also noted as a threat. After two summers without tourists and numerous shutdowns, a lack of a workforce could constrain the tourism sector's ability to regrow.

After two summers without tourists, and numerous shutdowns, a lack of a workforce could constrain the tourism sector's ability to regrow.



The federal and provincial supports that have kept tourism businesses financially afloat over the past year are expected to taper off. The Conference Board predicts that a time lag between the removal of these supports and return to higher levels of tourism revenue could push businesses into insolvency. The current support program for the tourism and hospitality sector that subsidizes employee wages will end on May 7th, 2022.³⁷

While the Conference Board outlook is more positive than Destination Canada's, it is important to note that a full recovery is not expected until 2023 at the earliest; in the case of international visitation: 2024. This leaves the tourism sector with a minimum of two "lost" summers and one summer of low demand before pre-pandemic levels of demand return.

Impact of COVID-19 on Perceptions of Work in Tourism

Despite tourism being the hardest hit sector of the economy, Canadians continued to feel that the tourism sector is an important economic driver. A November 2020 survey conducted by Leger on behalf of Tourism HR Canada revealed that Canadians believe that the tourism industry is important to their province and Canada's economic well-being.³⁸ A majority of Canadians agree, or strongly agree, with statements such as:

- Tourism creates growth opportunities for businesses (82%)
- Tourism industries create a significant number of jobs for residents (81%)
- Tourism supports a greater diversity of restaurants, attractions, events and other amenities (78%)
- Tourism generates substantial tax revenue for Canada (76%)



In January 2022, Tourism HR Canada, under the auspices of the THER initiative, commissioned Leger to conduct follow-up surveys: a survey of perceptions of employment in the tourism industry conducted with a sample of displaced tourism workers who had recently moved on from positions in the industry “THER Displaced Tourism Workers Panel Survey” and a general population survey, “Canadians’ Attitudes Toward Tourism as a Place of Employment and Economic Driver”.

Nearly half of the respondents (45.8%) to the “THER Displaced Tourism Workers Panel Survey” reported that they lost their jobs due to COVID-19 during the first few months of the pandemic. Out of those who did not lose their jobs, over half (54.7%) saw a significant reduction in hours at that time. Between February 2020 and December 2021, 17.3% of those surveyed suffered an involuntary loss of employment (e.g., laid off/fired) from their tourism jobs due to COVID-19. Respondents who decided to continue working in the tourism sector did so because of the flexible work hours, the pleasant working environment, and the uniformity with their skills, interests, and the perceived fit with their personality.

THER's marketing campaign was targeted at workers who had left the sector as well as encouraging new entrants to join the industry. The campaign was particularly focused on youth, women and people from racialized communities, who experienced higher than average rates of unemployment during the pandemic and represent a large pool of untapped labour for the sector as it moves into recovery in 2022.

THER's perception survey of the general population, "Canadians' Attitudes Toward Tourism as a Place of Employment and Economic Driver", found that overall sentiment toward the sector is generally positive; however, 41.7% of respondents reported that their perceptions of the tourism industry have become increasingly negative since the beginning of the pandemic. This is primarily due to COVID-19 negatively impacting respondents' feelings of comfort and their perceptions of personal health and safety while working in the tourism industry. However, nearly two-thirds of the respondents (65.2%) would still recommend a career in tourism to family and friends. Overall, respondents indicated that employment in the tourism industry provides valuable career experiences and skills (soft skills, in particular). Respondents agree that the skills that are learned when working in the tourism industry are relevant to developing skills that would allow one to be successful in their career. But, they also feel that wages in many tourism jobs are too low to support a satisfactory lifestyle.





Slightly over half of the respondents (50.8%) who are presently employed in the tourism industry agree that the tourism businesses that employ them have difficulty finding enough workers.

News coverage of the tourism industry's challenges during the pandemic have had an impact on perceptions of tourism as a place of employment. Over two-thirds of survey respondents (71.1%) have read or been made aware of media stories about labour shortages affecting tourism industries as they reopen. After reading the stories, 34.2% of them hold a more negative view of the tourism sector as a place of work.

Slightly over half of the respondents (50.8%) who are presently employed in the tourism industry agree that the businesses that employ them have difficulty finding enough workers. If any recommendation needs to be made to help their businesses find more workers, offering better wages is thought to be a good solution. Nearly two-thirds of the respondents (63.1%) think that the inability of their employers to find enough workers has negative effects on their own experiences at work. Generally, respondents feel that they are likely to continue their current jobs or work at the same business by this time next year.

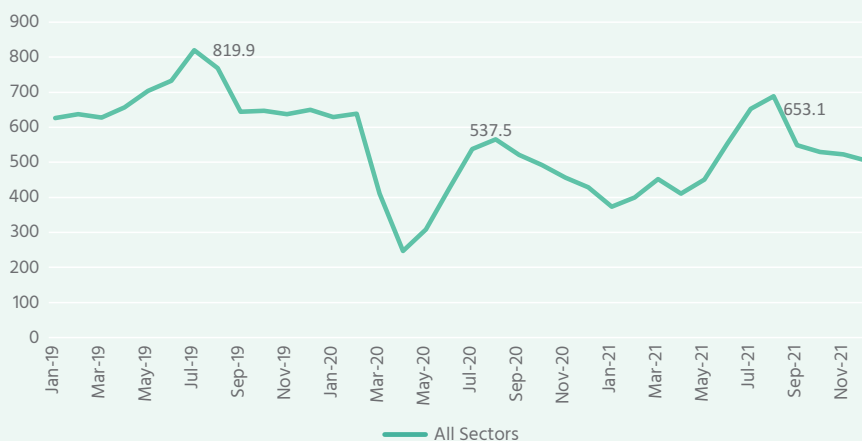
Labour Needs of Youth

One potential solution to address labour market shortages is to actively recruit and employ a greater number of Canadian youth in tourism occupations. The tourism industry provides a great opportunity for young people to enter the job market as they can gain a wide range of work skills and access opportunities for advancement into additional roles and management positions.

The 2016 census showed that 560,000 youth (age 15–24) worked in tourism. Young people make up 31% of Canada's tourism workforce, compared to only 13% of Canada's overall labour force and population.³⁹

The summer months are a peak time of year for youth employment in tourism. Seasonally unadjusted data from Statistics Canada's Labour Force Survey reveals that in the peak month of July, youth employment in tourism reached 819,900 positions in 2019 (Figure 16). There was a significant decline in youth employment in tourism to 537,500 in July 2020 and an uptick to 653,100 in July 2021 but with a significant shortfall of 166,800 since the same month in 2019 (i.e., pre-COVID-19).⁴⁰

Figure 16
 Tourism Employment
 by Age Group —
 15-24 years (Unadjusted,
 Monthly, x1000)⁴¹



Youth Perceptions of Tourism Employment During the Pandemic

Respondents age 15-24 represented 14.5% of those surveyed for the THER initiative's "Canadians' Attitudes Toward Tourism as a Place of Employment and Economic Driver" general population survey.⁴² Significantly more youth (8.4%), compared to non-youth (1.1%), decided to work in the tourism industry because they were laid off/terminated from their previous jobs due to COVID-19 or because it was their temporary job while in school (31.1%/47.7%). More youth (5.9%) who no longer work in the tourism industry reported that it was due to being laid off/terminated from their tourism jobs due to COVID-19 than non-youth (2.7%). The survey also found that significantly more youth would be inclined to recommend a career in the restaurant and food services industry (42.7%) and a career in the accommodation industry (52%) to their family/friends compared to non-youth (32.9%/40%). Higher pay/compensation, travel discounts, increased job diversity, flexible schedules, and job perks are more likely to increase young people's willingness to work in the tourism industry.

32.7% of the respondents to the "THER Displaced Tourism Workers Panel Survey"⁴³ were age 15-24. The survey supported the notion that the flexible and seasonal employment opportunities available in the tourism industry are key considerations for youth who seek out jobs across its many sectors. More youth (28%) currently work in the tourism industry because it is a temporary job while

searching for other employment opportunities than non-youth (13.5%). Respondents age 15-24 also feel that it was less likely that they would be in their current jobs or work at the same business by this time next year than did non-youth. In a similar vein, fewer youth (40.1%) than non-youth (50%) reported a desire to move to a managerial or supervisory role during their time working in the tourism sector.

The tourism industry provides unique opportunities for skills advancements that range from entry-level positions to management to oversight of massive travel operations. It is an appealing sector for those looking to gain new skills, advance professionally and continually be challenged in a range of work experiences. Working in tourism has many benefits and flexible working schedules and conditions that conventional industries do not. About 37% of the jobs in the tourism industry are part-time, which is significantly higher than the total labour force for Canada at 20%.⁴⁴

About 37% of the jobs in the tourism industry are part-time, which is significantly higher than the total labour force for Canada at 20%.



As the industry faces a post-pandemic labour shortage, employers in the tourism industry can engage with youth by building greater awareness around job opportunities, ensuring that the interests and aspirations of youth are understood, and implementing programs that foster leadership and skills development.



Indigenous Populations and Indigenous Tourism

There were a total of 1,673,785 Indigenous people in Canada in 2016 according to Statistic Canada. First Nations people, Métis and Inuit accounted for 4.9% of the country’s population in that census year – up from 3.8% and 2.8% of the population in 2006 and 1996, respectively.⁴⁵ The Indigenous population grew by 42.5% – more than four times faster than the rest of the population – between 2006 and 2016.

Statistics Canada points to a number of factors that have contributed to the growing Indigenous population including increased life expectancy, a relatively high fertility rate, and a higher number of people newly identifying as First Nations, Métis or Inuit on the census.

According to Canada’s “2016 Census”, 4.1% (75,100) of tourism industry workers were Canadians with “Aboriginal identity”. The Conference Board of Canada found in a study produced for the Indigenous Tourism Association of Canada (ITAC) in 2017 that Canada’s Indigenous tourism sector⁴⁶ contributed \$1.7 billion in direct economic impact, with roughly 1,875 Indigenous tourism businesses operating across Canada (Figure 17), employing just over 39,000 people.⁴⁷ Ontario employed the largest number of people in the Indigenous tourism sector, providing 12,924 jobs, followed by British Columbia (6,957) and Quebec (4,083).

Previous surveys of the Indigenous tourism sector reveal that, between 2015 and 2017, there had been a 24% increase in gross domestic product over a three-year period. The number of businesses and jobs also experienced a significant growth of 23% and 18%, respectively in that time.⁴⁹

Figure 17
Indigenous Tourism
Businesses in Canada
– 2019⁴⁸

Industry	Total Employment
Arts & Heritage	518
Travel services - retail	373
Accommodation	344
Recreation and outdoor adventure	251
Food & Beverage	159
Transportation	120
Other	75
Gaming	35

Perceptions of Tourism Employment among Indigenous Peoples During the Pandemic

The “THER Displaced Tourism Workers Panel Survey” from January 2022 found that significantly more Indigenous respondents (63.8%) saw a significant reduction in hours due to COVID-19 during the first few months of the pandemic compared to non-Indigenous (44.4%).⁵⁰ Moreover, fewer Indigenous respondents (Mean: 2.58 out of 5) were likely to be in their current jobs or working at the same business by this time next year than non-Indigenous respondents (Mean: 2.98 out of 5). For those who do not plan to remain in their current tourism role, significantly more Indigenous respondents indicate that it is because they want to change careers or do something different (86.4%), the working environment is unpleasant (37%), or that they have a poor perception of the industry (29%) compared to non-Indigenous (33.2%/7.9%/3.3%). Additionally, a greater percentage of Indigenous respondents no longer work in the tourism industry because of insufficient opportunities for career advancement (45%) or seasonality (30.7%) compared to non-Indigenous respondents (17%/11.4%).

- 44% of Indigenous survey respondents are likely to recommend a career in the restaurant and food services industry
- 52% for the accommodation industry



Similar results were found in the THER initiatives general population survey which found that significantly more respondents who identified as Indigenous (8.7%) indicated that they no longer work in the tourism industry because they were laid off/terminated from their tourism jobs prior to the COVID-19 pandemic compared to non-Indigenous respondents to the survey (2.9%).⁵¹



One potential solution to labour market shortages in tourism is to actively recruit and employ Indigenous youth.

That said, a greater number of Indigenous respondents than non-Indigenous respondents indicated that they are likely to recommend a career in key tourism sectors:

- 44.3% of Indigenous respondents are likely to recommend a career in the restaurant and food services industry to family/friends compared to 33.8% of non-Indigenous respondents; and, 51.6% of Indigenous respondents are likely to recommend a career in the accommodation industry (e.g., hotels or campgrounds) to family/friends compared to 41.2% of non-Indigenous respondents.
- One potential solution to labour market shortages in tourism is to actively recruit and employ Indigenous youth. The average age of Indigenous persons in Canada is significantly younger compared to the non-Indigenous population. From 2006 to 2016, the number of First Nations, Métis and Inuit youth aged 15 to 34 increased by 39%, compared to just over 6% for non-Indigenous youth.⁵² The Inuit are the youngest of the three groups, with an average age of 27.7 years, followed by First Nations people (30.6 years) and Métis (34.7 years), significantly younger than the non-Aboriginal population average of 40.9 years.
- Given that the Indigenous population is young and growing more rapidly than the general Canadian population, there is great opportunity to increase employment of Indigenous workers in the tourism sector, which not only benefits the sector but Indigenous people as well.



Overall, employing Indigenous workers generates many benefits for businesses and communities.

Employers in the tourism industry can engage with Indigenous youth by building awareness around job opportunities, ensuring that the interests and aspirations of youth are understood, and implementing programs that foster leadership and skills development.⁵³

Overall, employing Indigenous workers generates many benefits for businesses and communities, including a better relationship and integration with the local community because Indigenous workers often act as role models in their communities and the local community benefits from higher employment rates and income levels. Businesses can expect improved employee equity and inclusion, increased customer satisfaction or retention, reduced skills gaps, improved quality of work, reduced staff turnover, improved productivity, and increased profitability and competitiveness.⁵⁴

Public Supports for Tourism Sector Employment and Recovery

Over the course of the pandemic, many supports for both individuals and businesses were introduced. These included subsidies such as the Canadian Emergency Wage Subsidy (CEWS), the Canadian Emergency Rent Subsidy (CERS), grants such as the Regional Relief and Recovery Fund, and low interest (or interest free) loans, such as those available through the Canada Emergency Business Account (CEBA), which as of January 2022 has approved \$48.4B in loans for 885,527 business applicants. In Ontario, CEBA loans totaling approximately \$19.7B have been awarded to 360,339 businesses.⁵⁵ These supports were needed by many but many reported that it was challenging to understand how to access them, and this was particularly true of Indigenous owned and operated tourism businesses.

The impact of the pandemic on tourism businesses could have been much worse, were it not for various financial supports put in place. A Tourism HR Canada-led survey of over 900 tourism businesses, conducted between January and February 2021 found that over 60% of responding businesses laid off staff due to COVID-19 restrictions put in place during the winter of 2021.⁵⁶

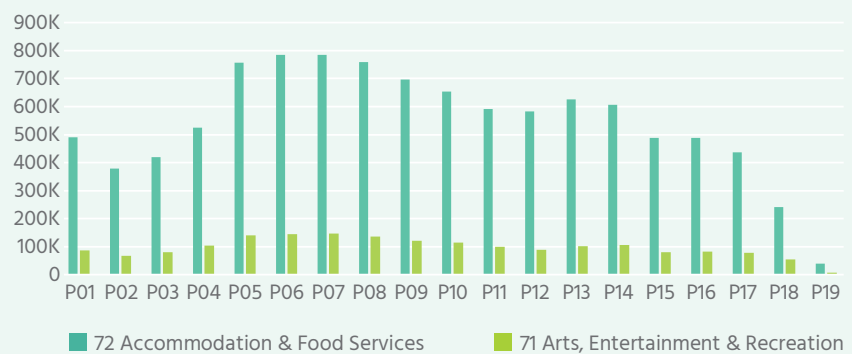


When comparing staffing reductions and revenue reductions, the survey data showed that businesses were holding on to staff to a greater extent than their revenue declines would suggest. 48% of responding businesses said that they were making 0 to 25% of their usual revenue for this time of year. Yet fewer businesses (40%) had staffing levels that were 0 to 25% of normal for this time of year. On the other end of the scale only 12.8% of businesses had revenue above 75% of normal but 30% of businesses had staffing levels that were at least 75% of normal.⁵⁷

That suggests that supports like the Canadian Emergency Wage Subsidy helped tourism businesses keep some of their workers employed despite a lack of revenue. Data on the number of employees within the tourism sector supported by the CEWS is unavailable, but we can look at sector level data and use accommodation and food services and the arts, entertainment and recreation sectors as proxies for tourism. The peak of use was in August and September of 2020 for accommodation and food services and in September 2020 for the arts, entertainment and recreation sector.

At peak, almost 785,000 workers in accommodation and food services had wages subsidized by CEWS and over 146,000 in arts, entertainment and recreation (Figure 18).

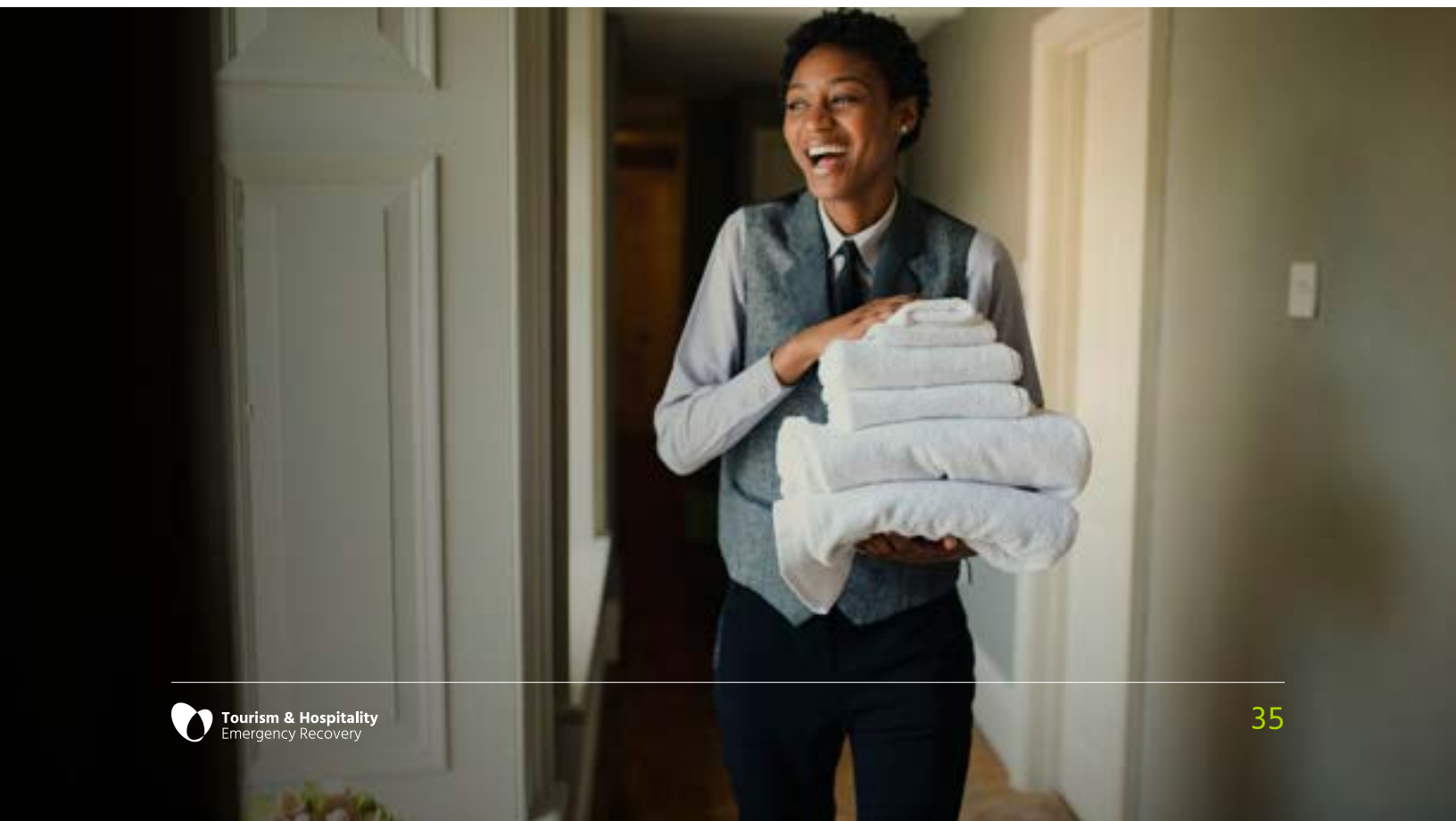
Figure 18
Number of Employees Supported by CEWS by Claim Period⁵⁸



- | | |
|---|---|
| P01 March 15 2020 to April 11 2020 | P11 December 20 2020 to January 16 2021 |
| P02 April 12 2020 to May 9 2020 | P12 January 17 2021 to February 13 2021 |
| P03 May 10 2020 to June 6 2020 | P13 February 14 2021 to March 13 2021 |
| P04 June 7 2020 to July 4 2020 | P14 March 14 2021 to April 10 2021 |
| P05 July 5 2020 to August 1 2020 | P15 April 11 2021 to May 8 2021 |
| P06 August 2 2020 to August 29 2020 | P16 May 9 2021 to June 5 2021 |
| P07 August 30 2020 to September 26 2020 | P17 June 6 2021 to to July 3 2021 |

The number of workers supported by CEWS dropped significantly over time but remained in the hundreds of thousands nationally within those two sectors at the end of summer 2021. Nationally, the accommodation and food services sector has consistently been the largest user of the CEWS subsidy.

Support programs and services are not limited to government funded initiatives. As part of the THER initiative, Tourism HR Canada conducted a market intelligence survey in January 2022 with the purpose of assessing the ecosystem of supports that exist across Canada that business owners can access as part of tourism industry recovery efforts.⁵⁹ A comparative table (included at Appendix 1) provides a list of examples of government supports and industry resources and programs, and various types of workforce recovery initiatives that are either specific to the tourism industry or are broader initiatives that complement more targeted initiatives. While tourism recovery funding programs were a major focus of survey respondents, the programs that were most named as being key components of a comprehensive tourism industry workforce recovery toolkit included occupational skills training and apprenticeships and mentorships – with a particular emphasis on their delivery to Indigenous and remote communities, youth and students, and new immigrants to Canada.





The survey results not only helped to better understand the nature and objectives of specific programs and initiatives but also to identify gaps in tourism industry workforce recovery initiatives including HR supports, professional development, education and skills training and targeted funding. The research revealed that investments in new products or services intended to fill such gaps should be guided by the degree to which they:

- target key and growing workforce demographics that may have felt a significant impact from recent industry downturn, such as youth, and vulnerable and displaced workers;
- are tailored to specific industry subsectors, for example, outdoor and adventure tourism;
- support the development and re-entry of Canada's Indigenous persons into the tourism workforce;
- address the specific needs of regions and communities that were most impacted by overall declines in the local economy as well as the local tourism workforce;
- provide skills-based learning opportunities to new immigrants to Canada seeking to enter the tourism workforce;
- address growing skills gaps impacting operational and management staff; and
- enable tourism employers to create more inclusive (diversified) workplaces.

The support ecosystem provides many opportunities for industry stakeholders such as associations to develop training programs aimed at helping businesses to mitigate the negative impacts of labour force shortages that the sector will face in future years.



Conclusion: Fostering a Resilient Tourism and Hospitality Sector

At present, Canada's tourism industry is experiencing an unprecedented, critical shortage of skilled labour leaving many tourism businesses without the skilled workforce upon which they depend. This has significant impact on business productivity and the ability of companies to compete – pointing to the potential for a more onerous and longer haul to recovery for tourism in Canada than many other sectors.

The problem is multi-faceted: in a relatively short period of time and with enormous financial stresses, tourism employers are dealing with a number of workforce issues as they attempt to adapt to a changing economic environment and volatile labour conditions while seeking a wide variety of solutions to help mitigate the resulting labour shortage.

To support the recovery of the labour force and reduce barriers for workers to enter or continue the tourism workforce, a few key changes to policies and programs could bring an immediate and palpable impact. These include reducing red tape or complexity in accessing immigration programs or other labour sources in the country, and creating programs and support to relocate workers,

promote student mobility, and incentivize settlement in rural communities where workers are most scarce. Additional efforts can be made to: attract workers during peak seasons, improve negative perceptions of employment in the sector, and address critical skills shortfalls so that communities, policy makers, and educators see and view jobs and careers in the tourism sector as an opportunity.

Inevitably, as displaced workers return and new employees join the sector, there will be a need to accommodate different work and worker contexts. Skills training is an essential accelerator to help tourism employers adjust to new business realities. Unfortunately, alleviating a labour shortage is not clearcut – primarily because the bulk of funding and oversight for training lies with provincial bodies rather than the federal ecosystem and different provinces and territories utilize different strategies and approaches.

Skills training is an essential accelerator to help tourism employers adjust to new business realities.



Going forward, improved coherence and rationalization of the approach to training and support initiatives is essential to recovery efforts. In particular, industry recovery will be best facilitated by a concerted effort to link target populations to tourism employment with a particular focus on young workers, Indigenous and other underrepresented populations to ensure that groups at risk of being left behind can access necessary supports and training opportunities.



Recommendations

The structural changes impacting tourism are part of a larger workforce context affecting all sectors. The industry is undergoing a great deal of change during a highly disruptive period, and the emergent business models also mean there are changing demands on the number and types of workers, and skills needed. Addressing the shortfall in the supply of workers, the growing skills mismatch, and barriers to employment is a complex undertaking that requires a sustained all-of-sector approach — one that is dynamic and responsive to ongoing market needs, and to economic, social, and political drivers. The industry will need to employ several new strategies to attract and retain workers.

Building on the findings from this research, Tourism HR Canada identified principal measures to address the short-term and long-term systemic and structural issues impacting the recovery and growth of the tourism workforce:



1. Investments in recovery programs and services for reskilling and upskilling

Investments in skills are essential. Businesses must optimize their workforce by ensuring workers are versatile and adaptable to a range of work contexts, equipped with transferable skills and new skills that enable tourism operators to transform their business and operational models. Industry is asking for assistance with product development, business innovation, use and integration of new technology (operational/staff, consumer support, social media), strategies for business stability and risk management, and much more. Accessible “just in time” market-led training for workers/job seekers, employers, and intermediaries (e.g., career development practitioners, educators) should be the focus.

A priority should be funding and programs to support skills and work transition for under-represented labour groups, such as Indigenous youth and new Canadians.

2. Development of a comprehensive attraction and retention strategy

The overall aims of a tourism and hospitality talent attraction and retention strategy should be to promote jobs and careers in tourism in a way that addresses reputational damage and negative perception of employment in the industry and creates working conditions that are conducive to healthy workplaces, good paying jobs, and sustained supply of workers across Canada. Ideally, the strategy will:

- increase labour market participation by under-represented and vulnerable groups, e.g., new Canadians, Indigenous peoples, and further diversify tourism’s workforce;
- inform policy, labour investments, and advocacy efforts;
- create efficiencies and reduce duplication of resources, i.e., coherence, coordination, collaboration;
- improve the ‘ecosystem’, e.g., affiliations with supply networks, service providers, policy makers; and,
- improve employer human resource practices and training capacity.



3. Access to new programs and services to help employers manage ever-complex human resource demands

COVID-19 brought massive disruption to the workforce, highlighting the necessity for businesses to increase human resource management capacity, and spurring changes in business models and consumer behaviour. These changes require workers with different skills, and ways to manage ever complex workforce changes and issues.

Employers need tools to help them address challenging staffing issues, including ways to recalibrate the staffing structure, developing plans to help employees transition back to work or new jobs, and best practices to help employees manage difficult circumstances such as coping with mental health needs.

Tourism HR Canada's research highlighted the need for employers to innovate HR practices. Businesses must learn to work with blended workforces comprised of anchor teams augmented by the use of contracted workers (i.e., 'gig economy' workers). Businesses also need to further diversify their workforce and design business models or operations that enable them to employ more remote workers. Improved efforts to strengthen worker retention strategies and to tailor work to the needs of each worker has become an imperative. These examples illustrate the need for investments and supports towards improved operations and human capital management.

4. Increased advocacy to address policy reforms

Addressing long-standing systemic and structural workforce issues facing the tourism industry must go beyond field projects, demonstrations, investments in training and tools, capacity-building initiatives, and promotional campaigns. The acute challenges triggered or intensified by COVID-19 increased the appreciation for policy reform to obtain greater and more enduring results and benefits.

Research over the past two years identified various public policies that need careful consideration — ones that, with changes, could benefit the sector by securing a more sustained and stable supply of qualified workers. One viable policy option is to consider adjustments to many of the current immigration streams with policies that promote a better alignment of skills commensurate

with tourism's labour market needs and increased quotas to serve the industry. Other examples include the need for new or increased incentives to promote learner and worker mobility; the implementation of a new dedicated immigration stream for tourism; and incentives to enable small businesses to invest in digitalization. Additionally, many policies concerning labour law or relations could be augmented to address tourism workforce recovery needs, such as the implementation of a wage subsidy model for seasonal workers, or a more responsive and flexible approach to redeploy and re-employ furloughed workers that enables them to retain access to employment insurance until jobs stabilize.

Policy reform involves a complex political process and effective advocacy. Coherent and effective programs to improve workforce outcomes will require dedicated resources, effective coordination and the collaboration between tourism businesses and groups/ associations mandated to advocate on behalf of the industry.



5. Incentivizing tourism businesses to develop a digitalization strategy

The application of digital technologies enables businesses to adapt or transform operations or change their business models to be more resilient. With the increased scarcity of workers, tourism employers will need to consider alternatives to address human resource needs, such as increasing their number of remote workers or their use of technology. Consumers are expecting increased access and use of technology-led products and services which require workers skilled in developing, managing, and supporting these applications. These few examples illustrate the necessity and urgency for tourism businesses to invest in a workforce digitalization strategy — without it, the business will continue to face ever increasing difficulty in finding and keeping workers.

Digital workplace strategies are one way for businesses to keep pace with these new ways of working while maintaining (or even improving) business processes and employee experience.

6. Continued and sustained investments in workforce/ labour market information research to inform strategies

Real-time labour market information and the ability to synthesize, analyze, and inform policy decisions are critical at this junction of industry recovery (past trends are not a good predictor of future needs).

The industry must strive towards a cohesive plan that complements, and not duplicates, existent national, regional and local labour market plans and strategies.



7. Develop a pan-Canadian tourism workforce task force

Tourism must take both a short- and long-term view to implement multi-year initiatives based on good policies and political commitment. The strategy should be led by an appropriate governing body that is accountable to all stakeholders (e.g., businesses, organized labour, governments). A national workforce recovery panel, or some coalition of stakeholders, would strengthen and potentially accelerate efforts towards addressing post-pandemic recovery workforce challenges.

The expert panel could serve as a key reference group to governments and other groups. It could be tasked with providing advice and ideas on complex workforce issues and contemplating their social, economic, and political impacts.

Achieving this work will involve improved collaboration, new partnerships, engagement of community stakeholders, stronger advocacy, reliance on trusted and timely labour market data, and investments in technology. The industry must strive towards a cohesive plan that complements, and not duplicates, existent national, regional and local labour market plans and strategies.

Appendix: Comparative Table of Tourism Industry Recovery Programs and Initiatives

The following comparative table provides a broad scan of government supports and industry resources available between March 2020 and April 2022. These programs were aimed at industry workforce recovery and to offset impacts of the COVID-19 pandemic in Canada.

Several of the initiatives were specific to the tourism industry or were broader initiatives that complement tourism industry needs. Additional programs and resources may be found on the THER website at [LetsGetReady.ca](https://www.letsgetready.ca). While not intended to be a comprehensive list, this scan of recovery-focused initiatives helped to provide an overview of the existing support ecosystem and insights into new and additional types of initiatives that could further bolster Canada’s tourism industry workforce.

Location	Name	Initiator	Classification	Overview
National	Canada Recovery Hiring Program – CRA	Federal Government-CRA	Grant – General Businesses	Hiring subsidy which will support employers up to 50% on incremental remuneration paid to eligible working employees from 6 Jun 21- 20 Nov 21.
	Canada Summer Jobs Program – Service Canada	Federal Government-Employment and Social Development Canada	Subsidies for businesses hiring students – All applicants	Applicants should be between 15-30 years of age. Wage subsidies to private sector organizations with 50 or fewer full-time employees, and not-for-profit organizations.
	Canada Worker Lockdown Benefit – Federal	Federal Government	Grants – All applicants	Applicants should demonstrate reduced income linked directly to the lockdown or business closure due to the lockdown.
	Canada Emergency Benefit Business Account	Federal Government	Loan – General Businesses	CEBA program offered interest-free loans of up to \$60,000 to small businesses and non-profits.
	Tourism and Hospitality Recovery Program	Federal Government	Grant – Tourism & Hospitality Business	More than 50% of eligible revenues come from tourism, arts, hospitality, entertainment and recreation; 12- month revenue drop from March 2020-February 2021 of at least 40%.
	Tourism Relief Fund	Federal Government	Grant – Tourism Businesses	Targeted towards tourism businesses and organizations to adapt their operations to meet public health requirements while investing in products and services.
	The COVID-19 Tourism Workforce Recovery Toolkit – Tourism HR Canada	Non-profit – Federal	Training – Tourism Businesses	Online repository of tourism business planning resources and training designed to help tourism operators succeed during this unprecedented crisis.
	Propel – Tourism HR Canada	Non-profit-Federal	Training & Grant – Tourism Businesses	Initiative to help post-secondary students develop work-ready skills while qualifying employers are provided with wage subsidy upon hire of a student.

Location	Name	Initiator	Classification	Overview
National	Regional Relief and Recovery Fund (RRRF): Businesses within the Community Futures Network	Federal Government along with Local Regional Development Agencies	Grant – All businesses within Community Futures Network	The fund will help mitigate the financial pressure experienced by businesses and organizations to allow them to continue their operations.
	Regional Relief and Recovery Fund (RRRF): Businesses outside the Community Futures Network	Federal Government	Grant – All businesses outside Community Futures Network	The fund will help mitigate the financial pressure experienced by businesses and organizations to allow them to continue their operations.
	Regional Relief and Recovery Fund (RRRF): Women-Run Businesses	Federal Government	Grant – All businesses with a focus on women	The fund will help mitigate the financial pressure experienced by businesses and organizations to allow them to continue their operations.
	Regional Relief and Recovery Fund: Funding Requests over \$40,000	Federal Government	Grant – All businesses	The fund will help mitigate the financial pressure experienced by businesses and organizations to allow them to continue their operations.
	Highly Affected Sectors Credit Availability Program	Federal Government	Loans – Small and medium sized businesses	Businesses that have seen their revenues decrease by 50% or more due to COVID-19.
	Building Communities through Arts and Heritage- Local Festivals component	Federal Government	Grants	Support the arts and cultural sectors in immediately contracting and employing artists and cultural workers.
	Canada Arts Presentation Fund	Federal Government	Grants	Support for those eligible under the Building Communities Through Arts and Heritage.
	Canada Music Fund	Federal Government	Grant	Support for Canadian live music companies and artists to plan and present in-person/ hybrid concerts in accordance with local, provincial and national public health directives.
	Canada Emergency Rent Subsidy	Canada Revenue Agency	Grant	Rent Support
	Canada Emergency Wage Subsidy	Canada Revenue Agency	Grant	Wage Support
	Support for Indigenous Businesses	Federal Government	Loans – FNMI businesses	Support for small and medium sized Indigenous businesses in need.
	Work Sharing Program – COVID-19	Federal Government	EI benefits	Support for year-round, permanent, full-time or part-time employees who agree to reduce their normal working hours and share the available work.

Location	Name	Initiator	Classification	Overview
National	Local Lockdown Program – Federal	Federal Government	Grant – Tourism Businesses	Subsidies for businesses affected by the lockdown that are subject to a capacity-limiting public health restriction of 50% or more.
	The Impacts of COVID-19 on the Tourism Workforce in Canada	Future Skills Centre	Research	Perceptions and motivations of displaced workers and respondents in the general population to work in the sector
Alberta	Canada-Alberta Job Grant	Government of Alberta	Training – Applicable to any business	Max per year: \$300,000. Employers to pay one third while the government funds the rest.
	Alberta Jobs Now Program	Government of Alberta	Grant- Applicable to any business to offset hiring or training costs	Up to 25% of a new hire's salary will be covered. Up to 37.5% of a new hire's salary with a disability will be covered.
	Cooperative Investment Program	Government of Alberta	Grant – Diversification and sustainability of small tourism businesses and organizations impacted by COVID-19	Targeted towards restarting consumer marketing activities and development of traveller products.
	Small & Medium Enterprise Relaunch Grant	Government of Alberta	Grant – Financial assistance to Alberta businesses, cooperatives and non-profits who experienced a revenue reduction of at least 30%	Businesses, organizations or non-profits that were ordered to close due to public health measures.
	Capital Investment Program	Government of Alberta	Grant for Tourism Infrastructure Investment and Tourism Asset Investment.	New guidelines will be made available in Spring of 2022.
British Columbia	BC Tourism Resiliency Program (RDMOs with HR support from go2HRA)	Western Economic Diversification and Island Coastal Economic Trust	Training – Supporting Tourism businesses in human resources, finance, and business transitions	Webinars: navigating the pandemic, best practises, reputation management, human resource strategies, and recovery strategies.
	Small and Medium Sized Business Recovery Grant	Government of British Columbia	Grant – Business recovery from COVID-19	Grants of \$10,000 to \$30,000 were available to small businesses. An additional \$5,000 to \$15,000 grant was available to tourism-related businesses.
	BC Major Anchor Attraction Program	Government of British Columbia	Grant – One time emergency funding to major anchor companies and tour bus companies to help them operate at minimal levels until domestic travel resumes	Geared towards businesses and non-profits operating tour buses or major anchor attractions.

Location	Name	Initiator	Classification	Overview
British Columbia	Circuit Breaker Relief Grant	Government of British Columbia	Grant – Eligible businesses impacted by the 31Mar21 Provincial Health Officer orders and the 23 rd Apr 21 Emergency Programs order.	Program Closed- grants of \$2,000 to \$20,000 were available to hospitality, fitness, and accommodation businesses.
Nova Scotia	Co-Op education incentive – NS Govt - LSI	Nova Scotia Government	Co-Op Grant – General businesses	Wage assistance to organizations that offer career-related work experiences for university and college co-operative students
	Sector Impact Support Program – NS Govt (Dal)	Nova Scotia Government	Grant – Small businesses impacted by public health restrictions	Nova Scotian Businesses with an active Canada Revenue Agency business number; a gross revenue of 5 million or less in the recent tax year and a min gross payroll of \$1000 or a min gross monthly revenue of \$2,500 for Nov 21.
	Graduate to Opportunity – NS Govt – Dept LSI	Nova Scotia Government	Grant – Small Businesses	Incentive to hire a recent graduate. Employers would receive 25% of the first year’s salary; 35% if the new graduate is from a designated diversity group and 12.5% of the second year’s salary.
	Digital Content Marketing Program	Tourism Nova Scotia	Grant – Partner and fund marketing activities of Tourism businesses	Online marketing campaigns including social media advertising, search engine marketing, display and video advertising.
	Radiate Tourism Program	Tourism Nova Scotia	Training – Development and marketing activities of tourism businesses	Market research insights about travellers, coaching and package development, tips to create digital ads.
	Tourism Digital Assistance Program	Tourism Nova Scotia	Training – Targeting tourism businesses to develop better digital marketing or e-commerce platforms	Helping eligible tourism businesses to increase their visibility online and provide the services customers expect.
Ontario	Business Cost Rebate Program – Ontario	Government of Ontario	Grant – General Businesses	Rebate payments for a portion of the property tax and energy costs that businesses incur while being subject to capacity limits or a requirement to temporarily close.
	Ontario Tourism and Travel Small Business Support Grant	Government of Ontario	Grant – Tourism Businesses that were required to close as a result of the province’s move to modified step 2	Targeting active businesses, have fewer than 100 employees, have been required to close due to public health measures.

Location	Name	Initiator	Classification	Overview
Ontario	Ontario COVID-19 Small Business Relief Grant	Government of Ontario	Grant – Businesses that were required to close as a result of the province’s move to modified step 2	Similar grant as the above. The above was restricted to Tourism businesses only while this one applies to general businesses.
	Tourism Economic Development and Recovery Fund	Government of Ontario	Grant – Encourages the development of innovative new tourism products, support for tourism investment and capacity of Ontario’s tourism industry	Ontario operated business which is in existence for 1 year; applicant is not in default of the terms and conditions of any grant or loan; submit application 4 months prior to the start of the project.
	Ontario Cultural Attractions Fund	Government of Ontario	Loan – Awarded to Ontario-based non-profit and/or charitable professional arts, heritage or cultural organization or an Ontario municipality	To be eligible the project must represent the single largest new programming initiative; project must run for a fixed period of time; targeting new tourists to the community; must be able to pay back the loan.
PEI	Investment to boost local tourism	Regional Tourism Association and Destination Marketing Organization	Funding – Regional tourism association (RTA), North Cape Coastal Tourism Area Partnership and destination management organization (DMO)	A combined investment of \$100,000 was announced to deliver the Tourism Product Ignition Fund for tourism operators in Western PEI.
	Tourism Activation Grant	Tourism PEI & West Prince Ventures Limited/ East Prince Development Inc./ Active Communities Inc.	Funding – Tourism businesses	The Tourism Activation Grant will provide assistance to PEI tourism businesses in amounts from \$2,500 to \$50,000.
	Rural development investment 1	Government of Canada & Province of Prince Edward Island (PEI)	Funding – Tourism NGOs	The fund will provide tourism NGOs with working capital to stabilize and mitigate the economic impacts of the pandemic and shorten the recovery period for rural regions.
	Rural development investment 2	Government of Canada & Province of Prince Edward Island (PEI)	Funding – NGOs, industry associations, municipalities, First Nations and social enterprises	The fund provides community strategic planning services to not-for-profit organizations, industry associations, municipalities, First Nations and social enterprises.
	Tourism Interest Relief Program	Government of PEI	Loan – Tourism businesses	Must demonstrate a minimum 30% decrease in tourism related revenues compared to the same month in the prior year.

Location	Name	Initiator	Classification	Overview
PEI	Tourism Assistance Loan Program	Government of PEI	Loan – Tourism Businesses	Up to \$1 million in financing for Island Tourism Operators exc. non-profits. 5-year term loans with a 4% interest rate amortized over a maximum of 20 years.
	COVID-19 Operational Support Program for Community Museums and Cultural Venues	Government of PEI	Grant – Community museums, cultural venues	Ongoing- funding up to \$2,500. Applications open to community museums and cultural venues who have experienced at least 25% reduction in operating revenue in 2020 and have not received any other support.
Saskatchewan	Saskatchewan Tourism Sector Support Program	Government of Saskatchewan	Funding – Hospitality and event/attraction operators	Eligible hospitality and event/ attraction operators will be able to apply for a one-time, non-repayable emergency payment.
	The Pathway to Recovery Training Series	Tourism Saskatchewan	Training – Tourism employees	14 comprehensive training programs with each program led by an instructor in a safe online environment to provide occupational and pandemic-specific skills and knowledge.
	Restart Marketing Strategy	Tourism Saskatchewan	Marketing	Encouraging recovery by identifying opportunities in the affected sector, taking pre-emptive actions to guide decisions and boosting travel through marketing.
	The Re-Skill Saskatchewan Training Subsidy (RSTS) by Ministry of Immigration and career Training	Government of Saskatchewan	Training Grant – All businesses	Enhanced training support to ensure employers are able to access training to sustain business activities; reduce obstacles to hiring, retraining and training workers.
	Diversification & New Market Program	Government of Saskatchewan	Grant	Funding ranges from \$20,000-\$30,000. A minimum equity investment of 30% of the total project cost is required by the applicant.
	Re-Skill Saskatchewan Training Subsidy	Government of Saskatchewan	Grant – All businesses	Employers can make multiple applications to a maximum of \$5,000 for the duration of the program. The minimum amount per application is \$1,000 per training program.
Yukon, Northwest Territories, and Nunavut	CanNor – Northern Business Relief Fund (NBRF)	Canadian Northern Economic Development Agency	Grant	Demonstrated need and would provide funding up to a maximum of \$100,000 or up to March 31, 2021, whichever comes first.
	Tourism Cooperative Marketing Fund	Yukon Chamber of Commerce	Grant – Tourism businesses that are creative and collaborative with creative companies	Maximum of \$2,000 awarded to applicants.

Endnotes

- 1 The number of tourism jobs may also be reported as all jobs in Canada supported by tourists spending money. By that measure, there were 691,950 jobs due to tourism in Canada in 2019 according to the national tourism indicators. As this report is concerned with labour issues within the tourism sector, most statistics are for the total number of people or jobs within tourism. Where data on “jobs due to tourism” is used, it is noted.
- 2 United Nations. (2008). International Recommendations for Tourism Statistics 2008. New York: Department of Economic and Social Affairs of the United Nations Secretariat, Statistics Division. Pp. 10, point 2.9.
- 3 Ibid. Pp. 40 point 5.0
- 4 Statistics Canada, National Tourism Indicators 2020 Q1. Custom tables, all values expressed in non-seasonally adjusted current dollars and value. This figure encapsulates gross value added by all industry in response to tourism consumption plus amount of net taxes on products and includes domestic and international tourism consumption.
- 5 Statistics Canada. Table 36-10-0461-01. Government revenue attributable to tourism, summary indicators, annual.
- 6 Destination Canada, “Tourism Fact Sheet”, 2019.
- 7 Statistics Canada. Table 24-10-0043-01. International tourists entering or returning to Canada, by province of entry.
- 8 Statistics Canada. Table 33-10-0270-01. Experimental estimates for business openings and closures for Canada, provinces and territories, census metropolitan areas, seasonally adjusted
- 9 Statistics Canada. Table 36-10-0434-01 Gross domestic product (GDP) at basic prices, by industry, monthly (x 1,000,000)
- 10 Statistics Canada. Table 36-10-0230-01 Tourism demand in Canada, constant prices (x 1,000,000)
- 11 Statistics Canada. Table 24-10-0043-01 International tourists entering or returning to Canada, by province of entry
- 12 Ibid.
- 13 Statistics Canada. Table 24-10-0043-01. International tourists entering or returning to Canada, by province of entry.
- 14 Statistics Canada. Table 24-10-0043-01. International tourists entering or returning to Canada, by province of entry.
- 15 Statistics Canada. Table 36-10-0434-01. Gross domestic product (GDP) at basic prices, by industry, monthly.
- 16 Ibid.
- 17 Ibid.
- 18 Adapted from Statistics Canada’s Labour Force Survey, customized tabulations.
- 19 The Conference Board of Canada. (2019). The Future of Canada’s Tourism Sector, Bottom Line: Growth Aspirations Face Labour Challenges. Report prepared for Tourism HR Canada. November 2019. Analysis is based on inflation-adjusted 2012 dollars.
- 20 Customized calculations by Tourism HR Canada based on data tables produced for The Conference Board of Canada. (2019). The Future of Canada’s Tourism Sector, Bottom Line: Growth Aspirations Face Labour Challenges report.

- 21 Adapted from Statistics Canada, Labour Force Survey, customized tabulations.
- 22 Tourism HR Canada. (2021). COVID-19 Tourism Workforce and Business Impact Report, Wave Two.
- 23 Restaurants Canada. "Restaurants are key to restoring Canada's pre-pandemic employment levels". Online posting: <https://www.restaurantscanada.org/industry-news/restaurants-are-key-to-restoring-canadas-pre-pandemic-employment-levels/>. September 7, 2021.
- 24 Labour Market Information Council & Vicinity Jobs, Canadian Online Job Posting Dashboard accessed December 27th, 2021
- 25 The vacancy rate is the number of unfilled positions as a percent of total positions (all filled and unfilled positions)
- 26 Statistics Canada. Table 14-10-0372-01. Job vacancies, payroll employees, and job vacancy rate by industry sector, monthly, unadjusted for seasonality.
- 27 Adapted from Statistics Canada, Labour Force Survey, customized tabulations.
- 28 Statistic Canada. Table: 14-10-0372-01. Job vacancies, payroll employees, and job vacancy rate by industry sector, monthly, unadjusted for seasonality
- 29 Ibid.
- 30 Ibid.
- 31 Statistics Canada. Table 14-10-0328-01. Job vacancies, proportion of job vacancies and average offered hourly wage by selected characteristics, quarterly, unadjusted for seasonality. Vacancy rate based on custom calculations based on Census 2016 data.
- 32 Destination Canada. (2021). Destination Canada Visitor Economy Forecast Update - June 2021.
- 33 The Conference Board of Canada. (2021). Canada's Travel Markets Outlook to 2025. Ottawa: The Conference Board of Canada Updated October 4, 2021
- 34 Destination Canada. (2021). Destination Canada Visitor Economy Forecast Update - June 2021.
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- 36 The Conference Board of Canada. (2021). Canada's Travel Markets Outlook to 2025. Ottawa: The Conference Board of Canada Updated October 4, 2021.
- 37 Canada. (2021). "Targeting COVID-19 Support Measures". Ottawa: Department of Finance Canada. Backgrounder. October 21, 2021.
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- 39 Statistics Canada. (2016). Census of Canada, 2016. Customized tourism labour tabulations by Tourism HR Canada available online at <https://tourismhr.ca/labour-market-information/tourism-census-data/>
- 40 Adapted from Statistics Canada's Labour Force Survey, customized tabulations.
- 41 Ibid.
- 42 Leger (2022). Canadians' Attitudes Toward Tourism as a Place of Employment and Economic Driver. January 2022.
- 43 Leger (2022). THER Displaced Tourism Workers Panel Survey. January 2022.
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- 45 Statistics Canada. (2018). First Nations People, Métis and Inuit in Canada: Diverse and Growing Populations.
- 46 The Indigenous Tourism Association of Canada (ITAC) defines Indigenous businesses as businesses that are majority-owned, -operated, and/or -controlled by First Nations, Métis, or Inuit peoples, and having the able to demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.
- 47 The Conference Board of Canada. (2019). Canada's Indigenous Tourism Sector: Insights and Economic Impacts. Ottawa: Indigenous Tourism Association of Canada (ITAC).
- 48 Ibid.
- 49 Ibid.
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- 54 Ibid.
- 55 Canada. (2022). CEBA summary data as of January 26, 2022". Online posting: <https://ceba-cuec.ca/statistics/>. Accessed February 22, 2022.
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- 58 Canada. (2021). "Table 2: Approved Canada Emergency Wage Subsidy (CEWS) Claims by Period and Industry Sector Canada". Online posting: <https://www.canada.ca/en/revenue-agency/services/wage-rent-subsidies/emergency-wage-subsidy/cews-statistics/cews-detailed-data.html>, Accessed December 14, 2021.
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