

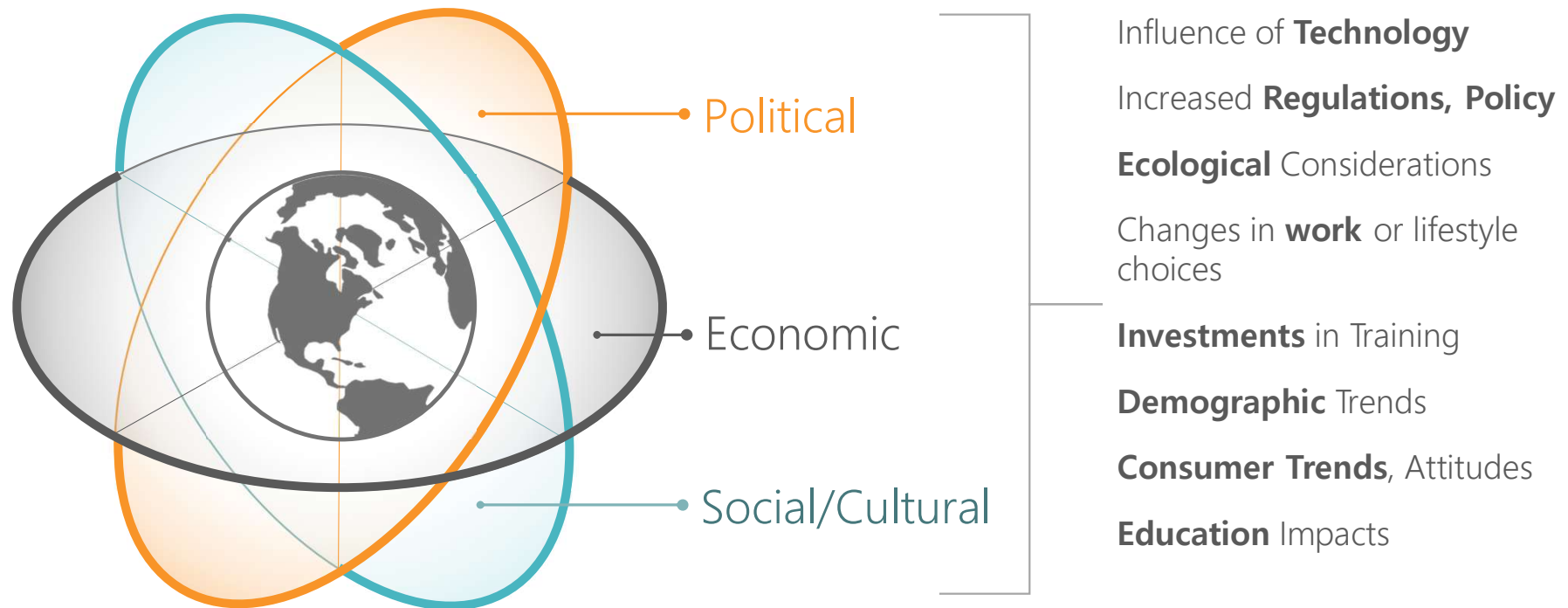
The Post Covid Future of Tourism

Calum MacDonald

Vice-President Labour Market Intelligence



Post Covid Future: A Complex Interplay



Tourism Jobs Defined by **Two Numbers?**



747,950

Jobs attributed to
tourism demand



1,900,323

Jobs in the
five tourism industries



Tourism **HR**
Canada



RH Tourisme
Canada

Tourism Jobs Defined by **Two Numbers?**

747,950

Jobs attributed to
tourism demand

1,900,323

Jobs in the
five tourism industries



Visitor Spending



Economic Impact



Accommodation



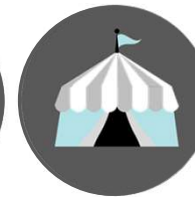
Food & Beverage



Transportation



Travel Services



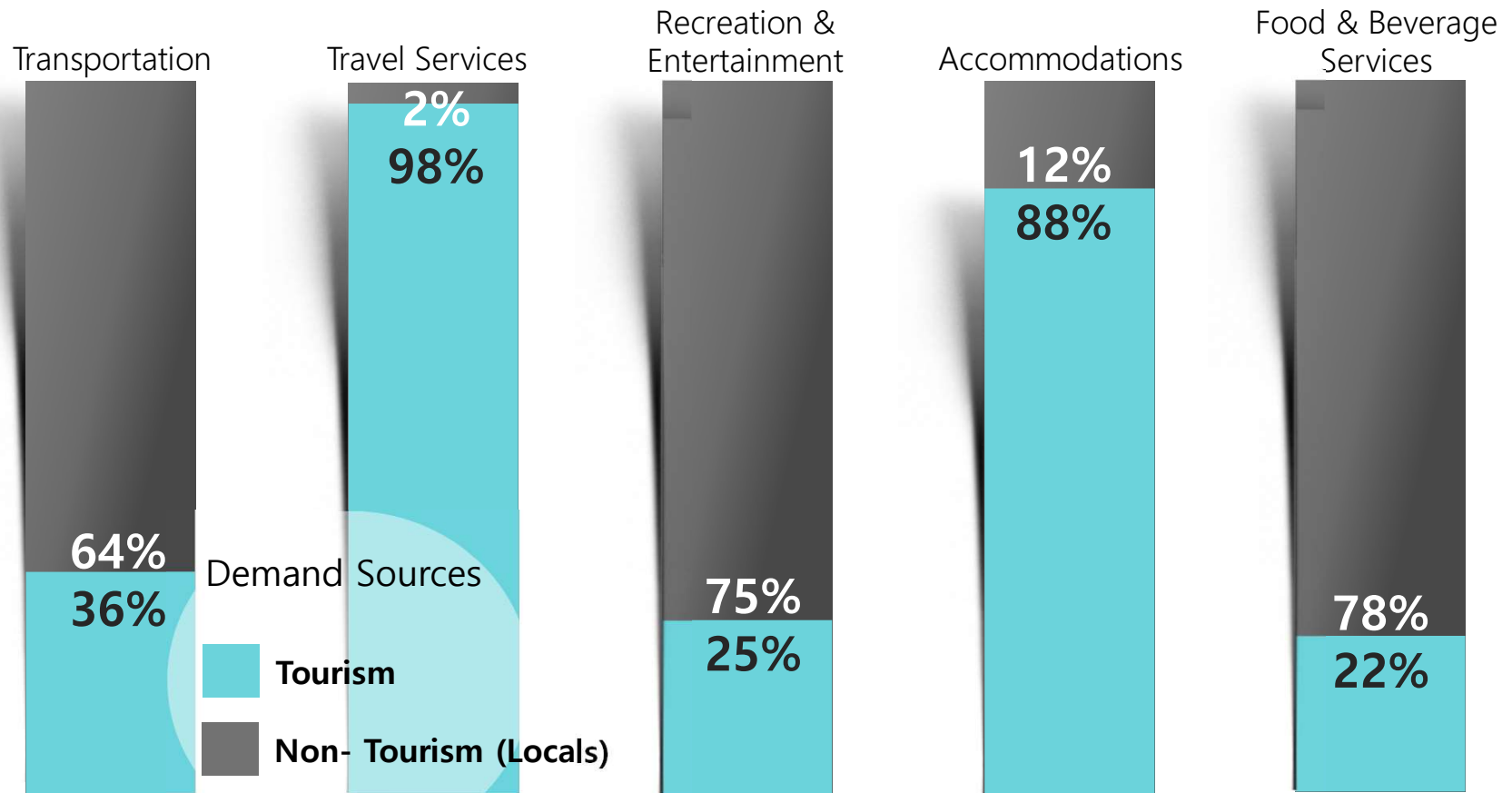
Recreation &
Entertainment

Tourism **HR**
Canada



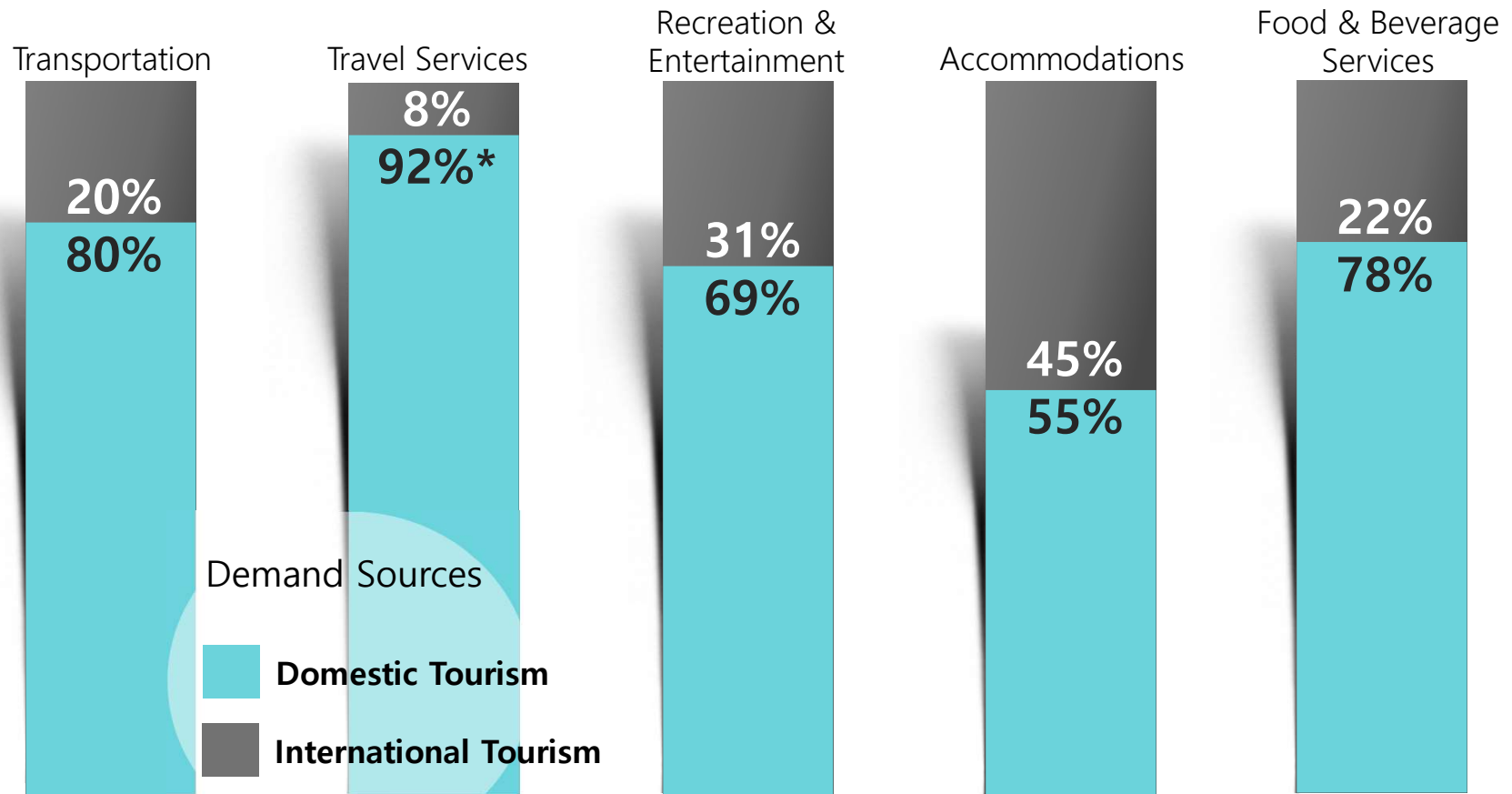
RH Tourisme
Canada

Tourism Industry Demand Sources



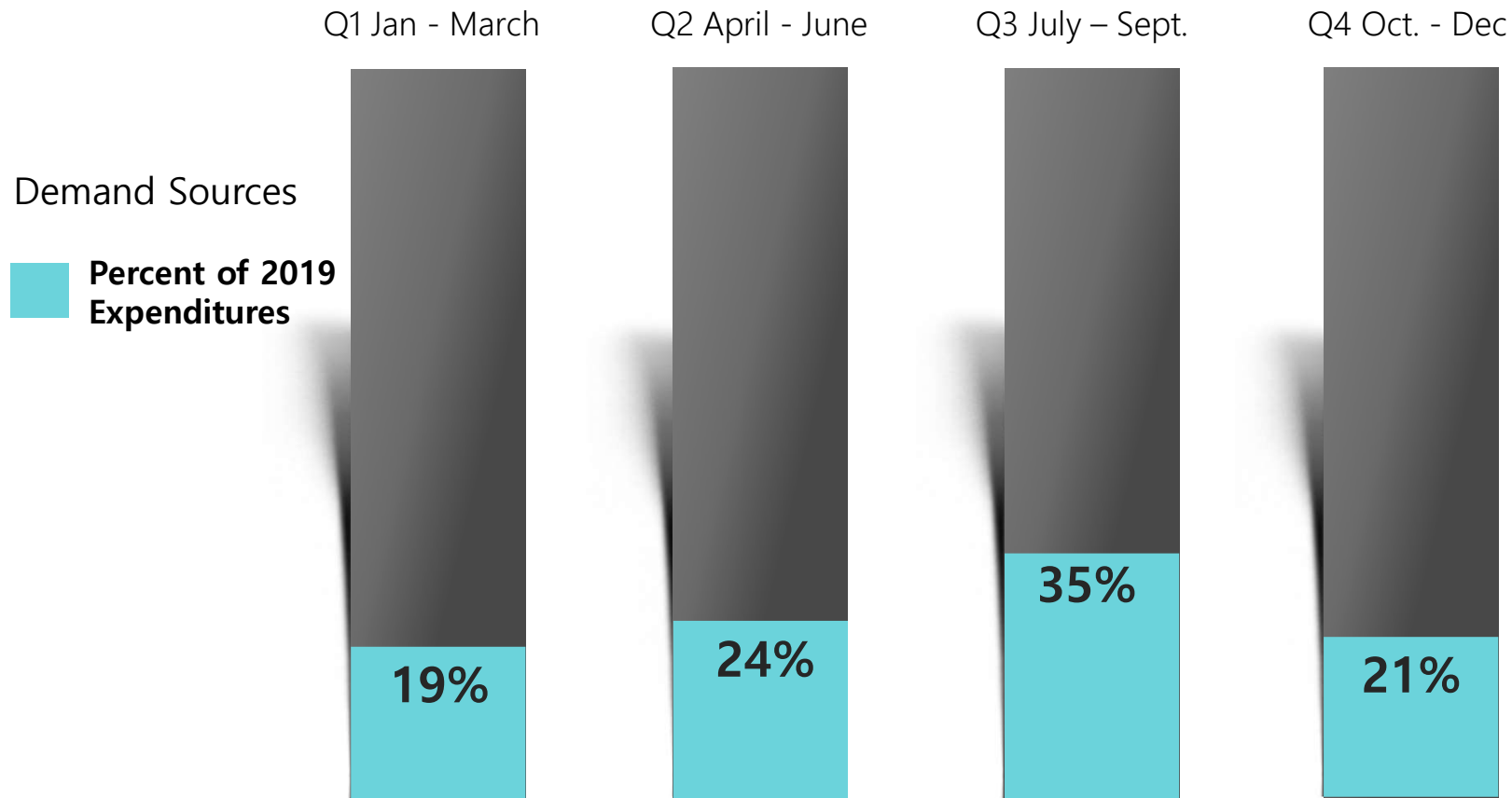
Source: Conference Board of Canada, Demand for Tourism Goods and Services - 2019

Tourism Industries **Demand Sources**



Source: Statistics Canada: National Tourism Indicators – Seasonally Unadjusted, Current Prices

Tourism Demand **Seasonality**

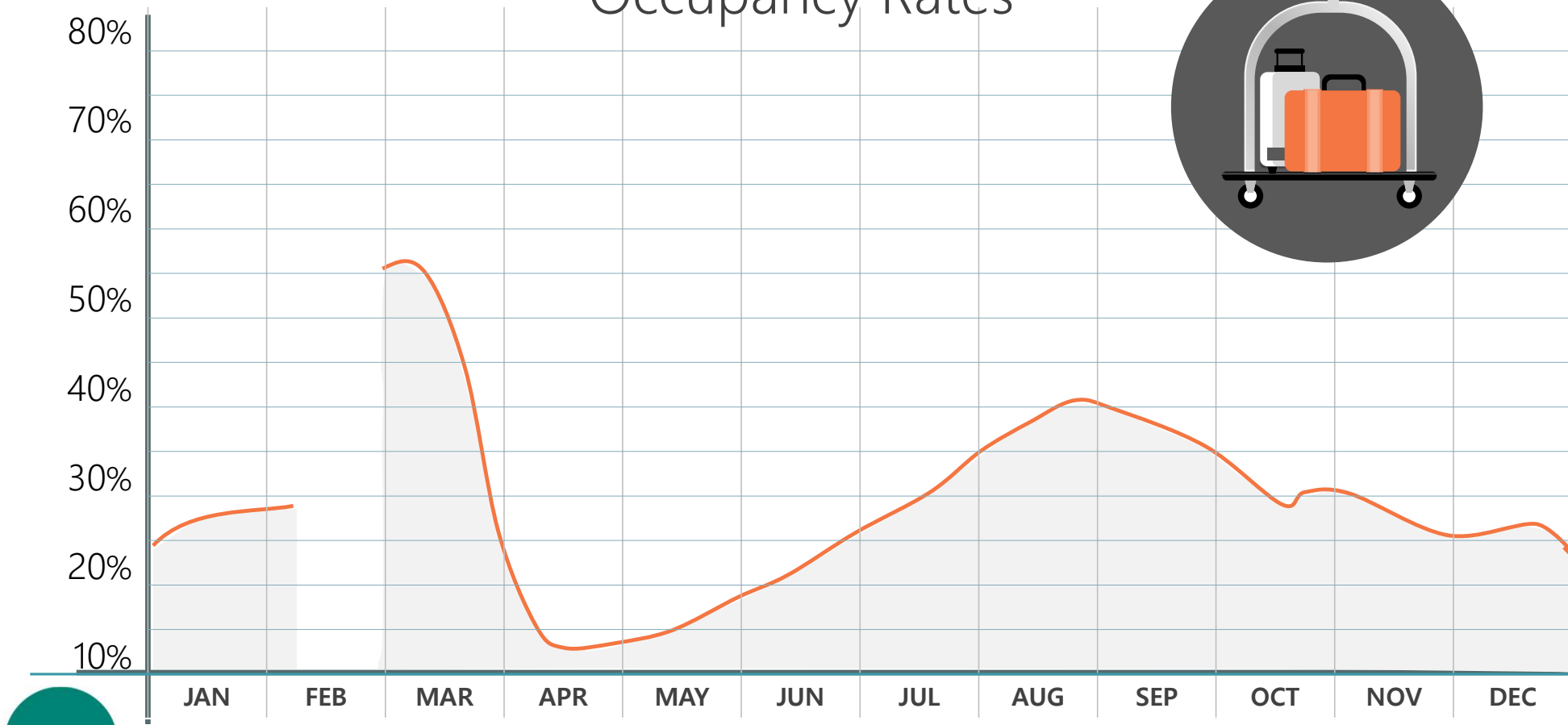


Source: Statistics Canada: National Tourism Indicators

The **Economic** Impact of Covid-19

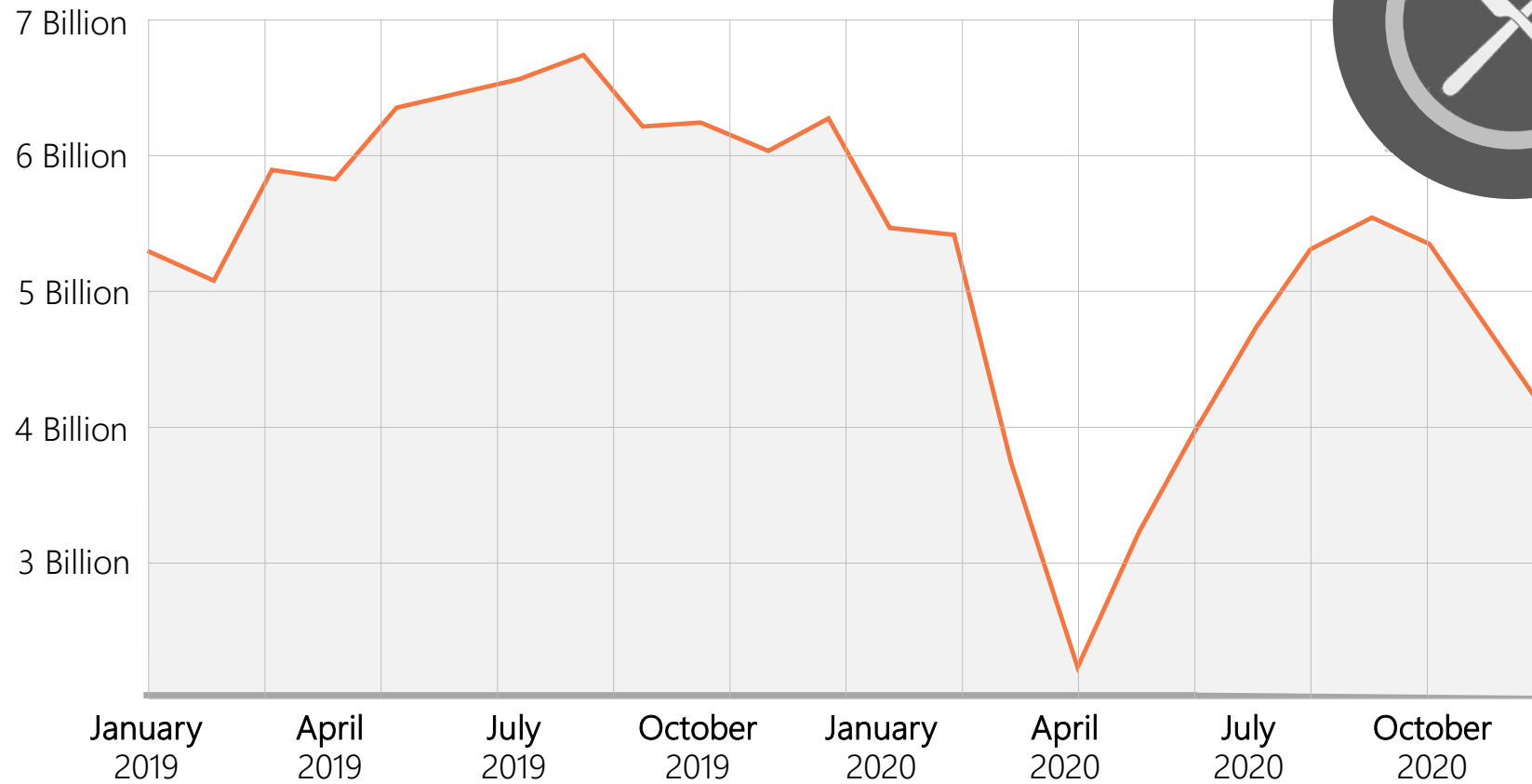


Occupancy Rates

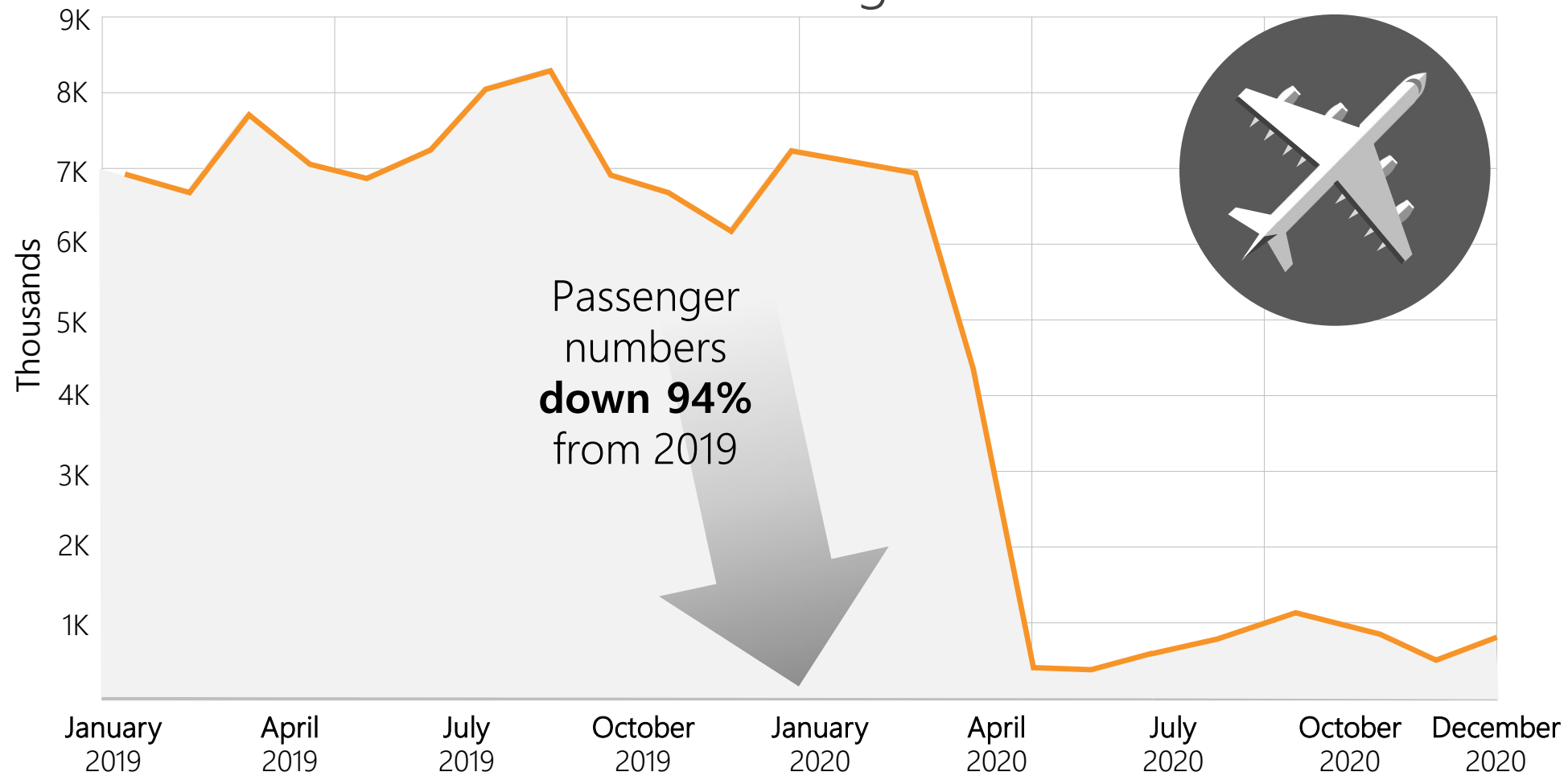


Food Service Sales

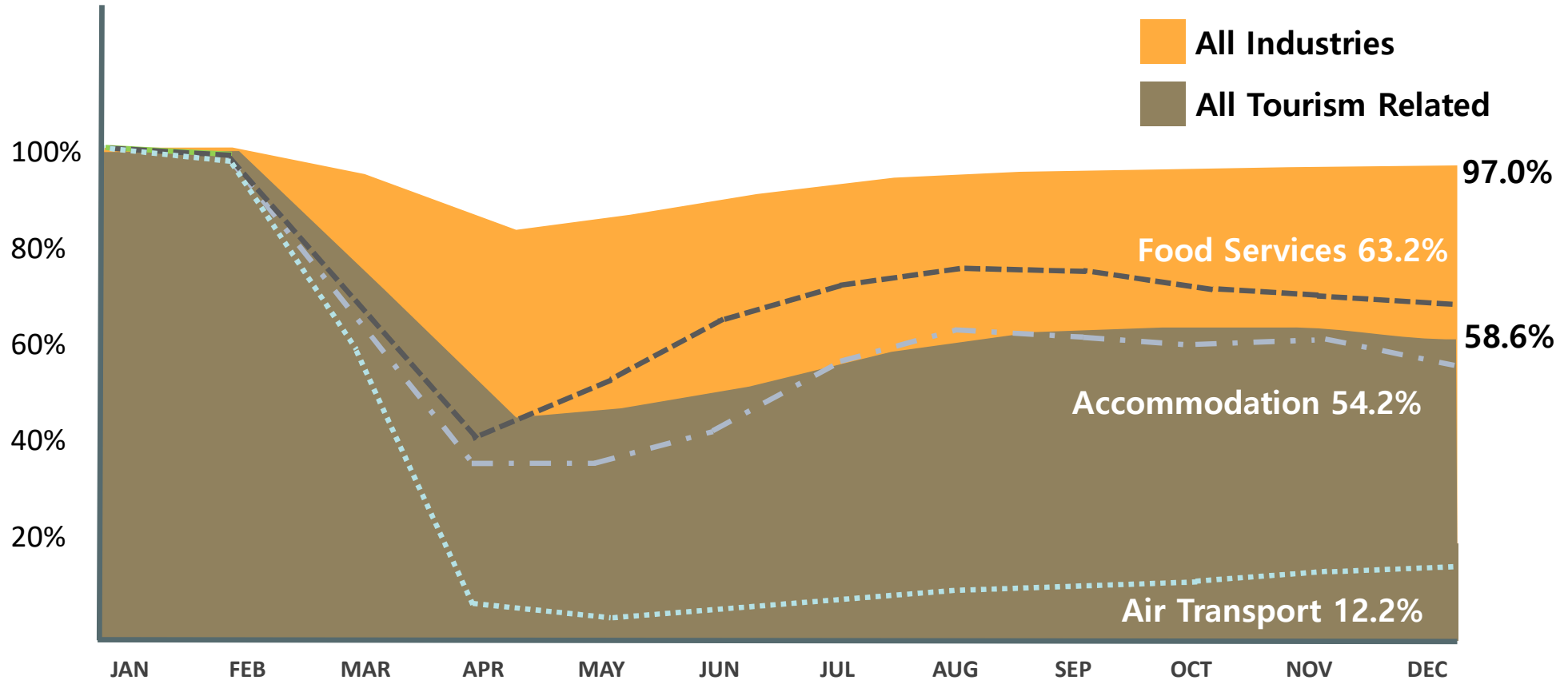
CANADA



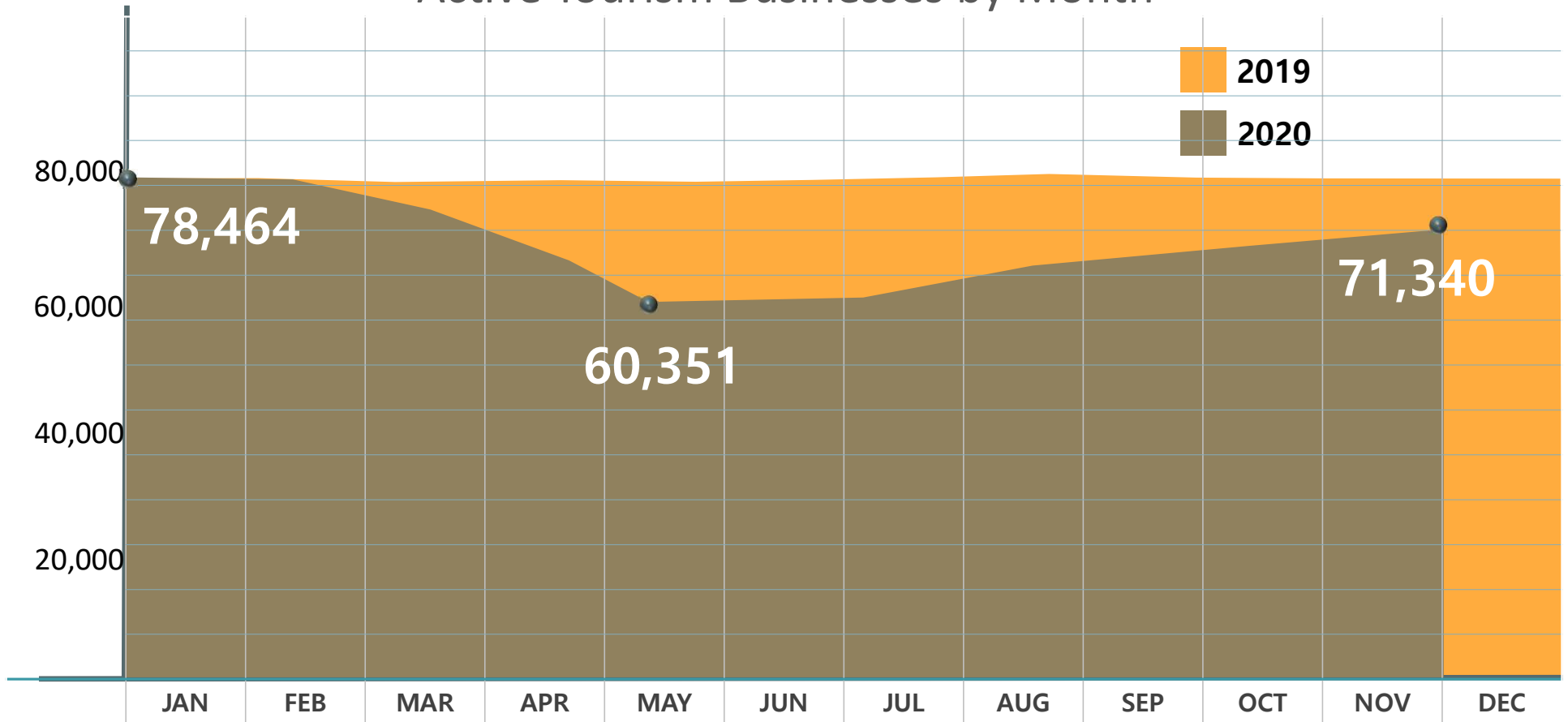
Airline Passengers



Monthly GDP by Industry January 2020 = 100



Active Tourism Businesses by Month



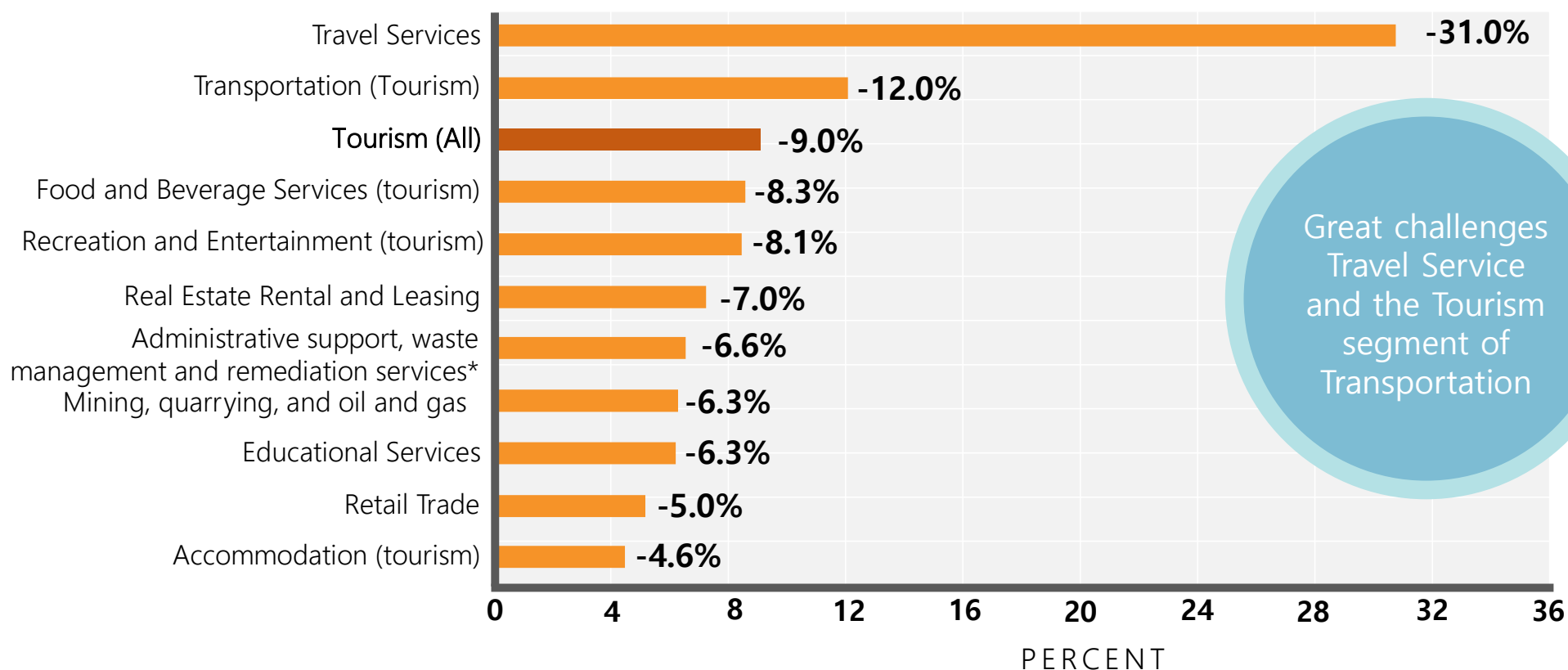
Tourism HR
Canada



RH Tourisme
Canada

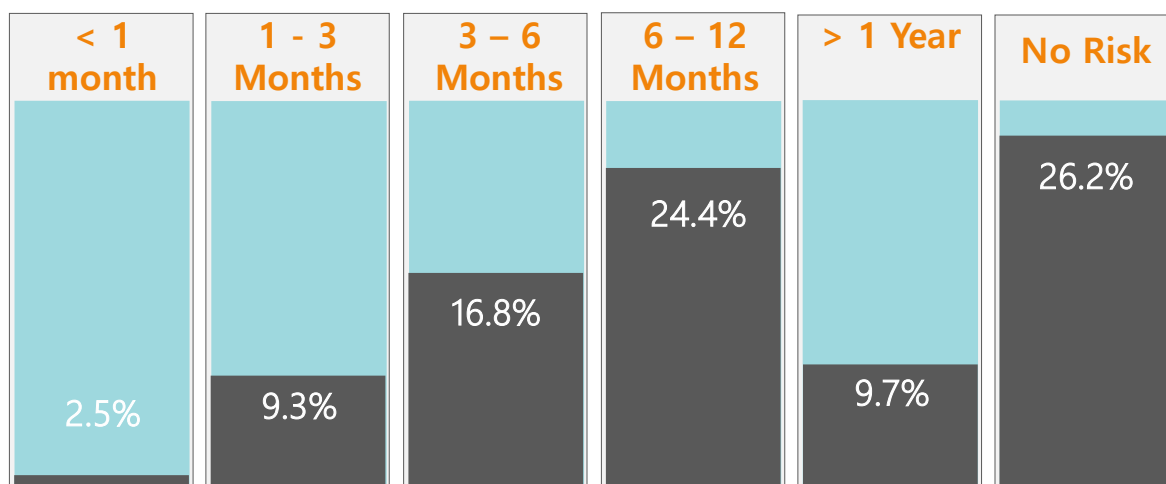
Source: Statistics Canada: Experimental Monthly Estimates of Business openings and closures

Active Businesses Decrease January to November

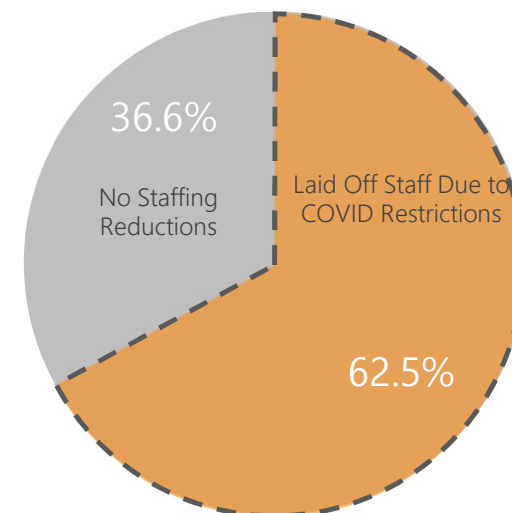


Risk of Business Closure

Question: Under current business conditions, how long can your business be sustained before you will be at risk of permanent closure?

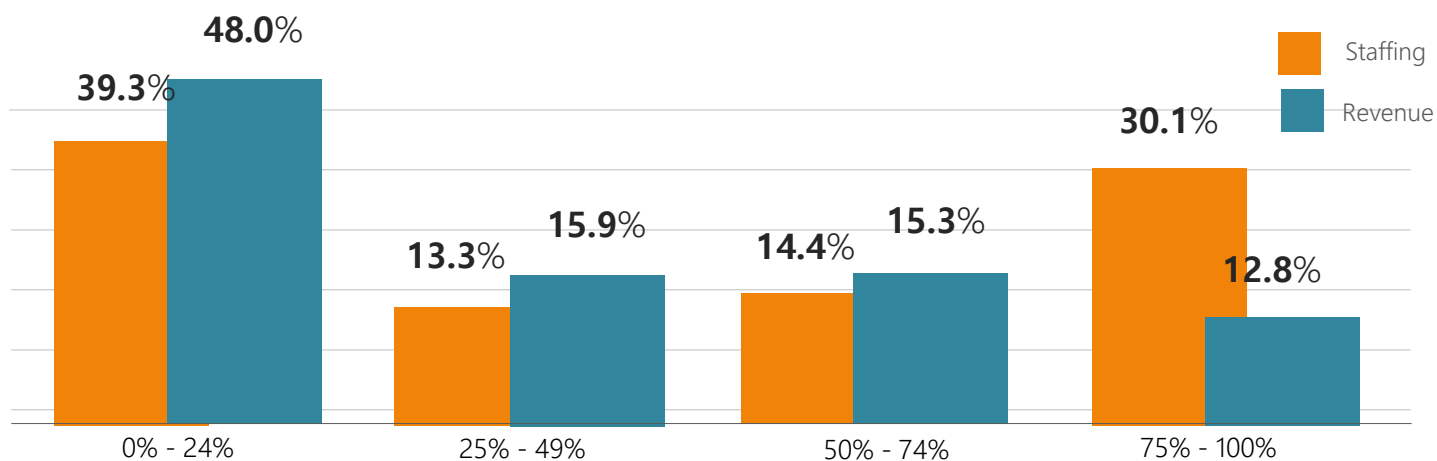


Layoffs



Staffing and Revenue Changes

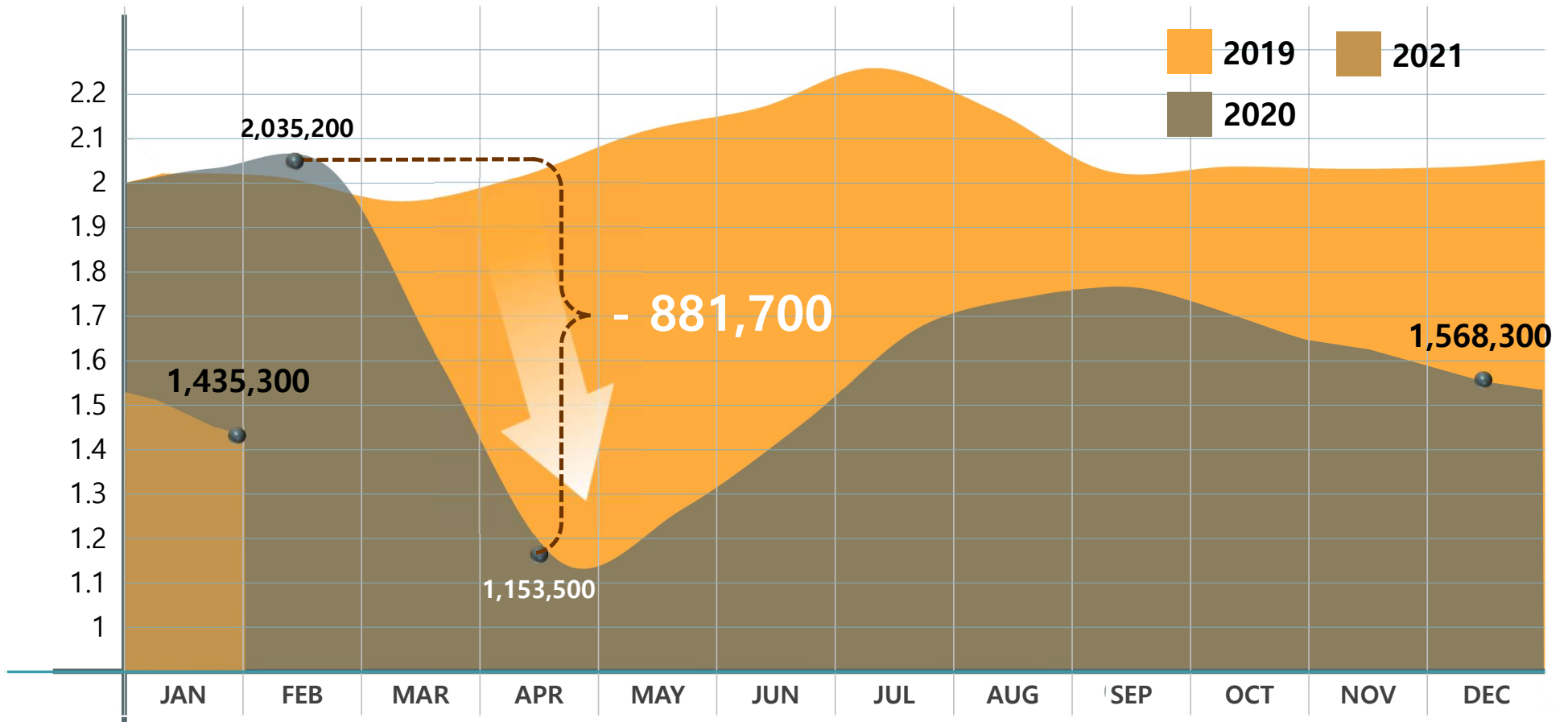
Question: How much of your usual staffing capacity/revenue for this time of year is your business currently filling/making?



The **Workforce** Impact of Covid-19

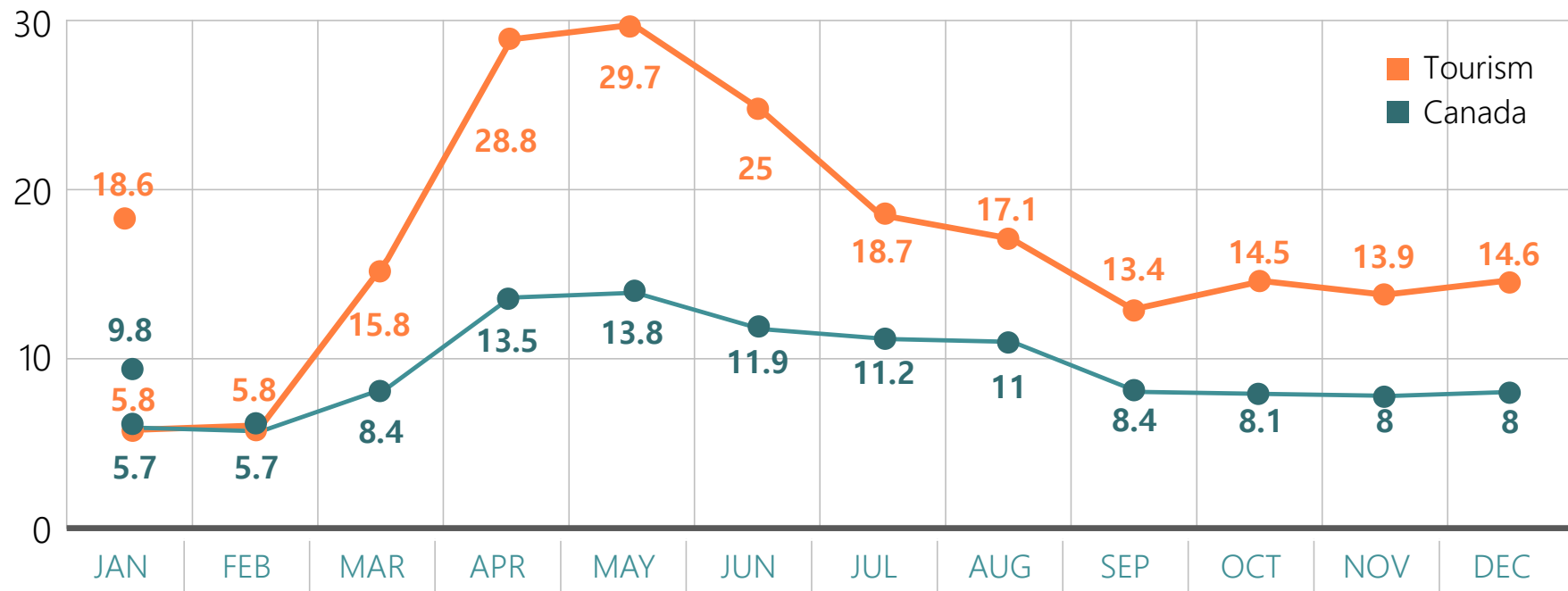


Total Tourism Employment 2019 vs 2020 & 2021

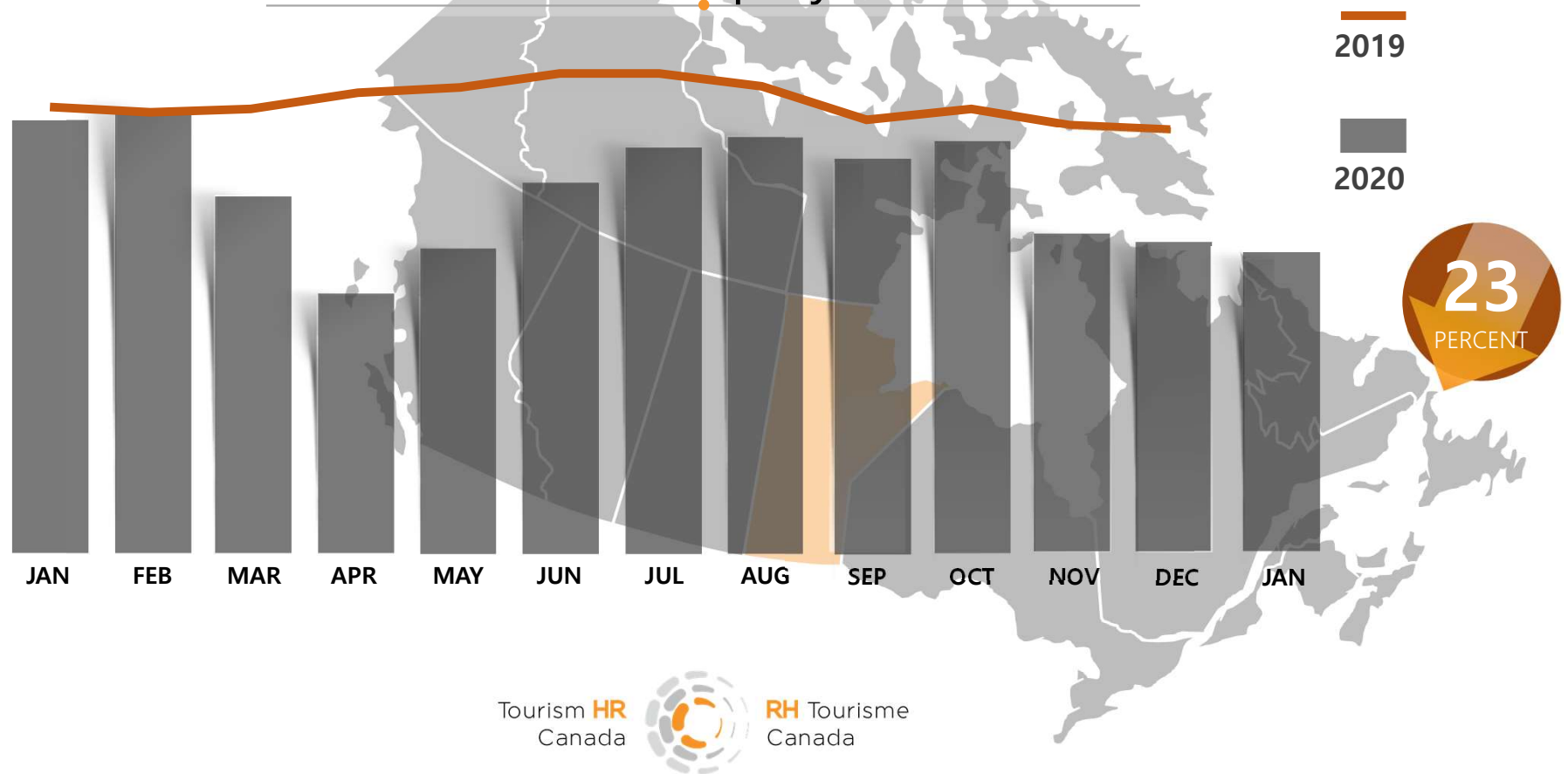


Monthly Unemployment Rate 2020

(Seasonally unadjusted)

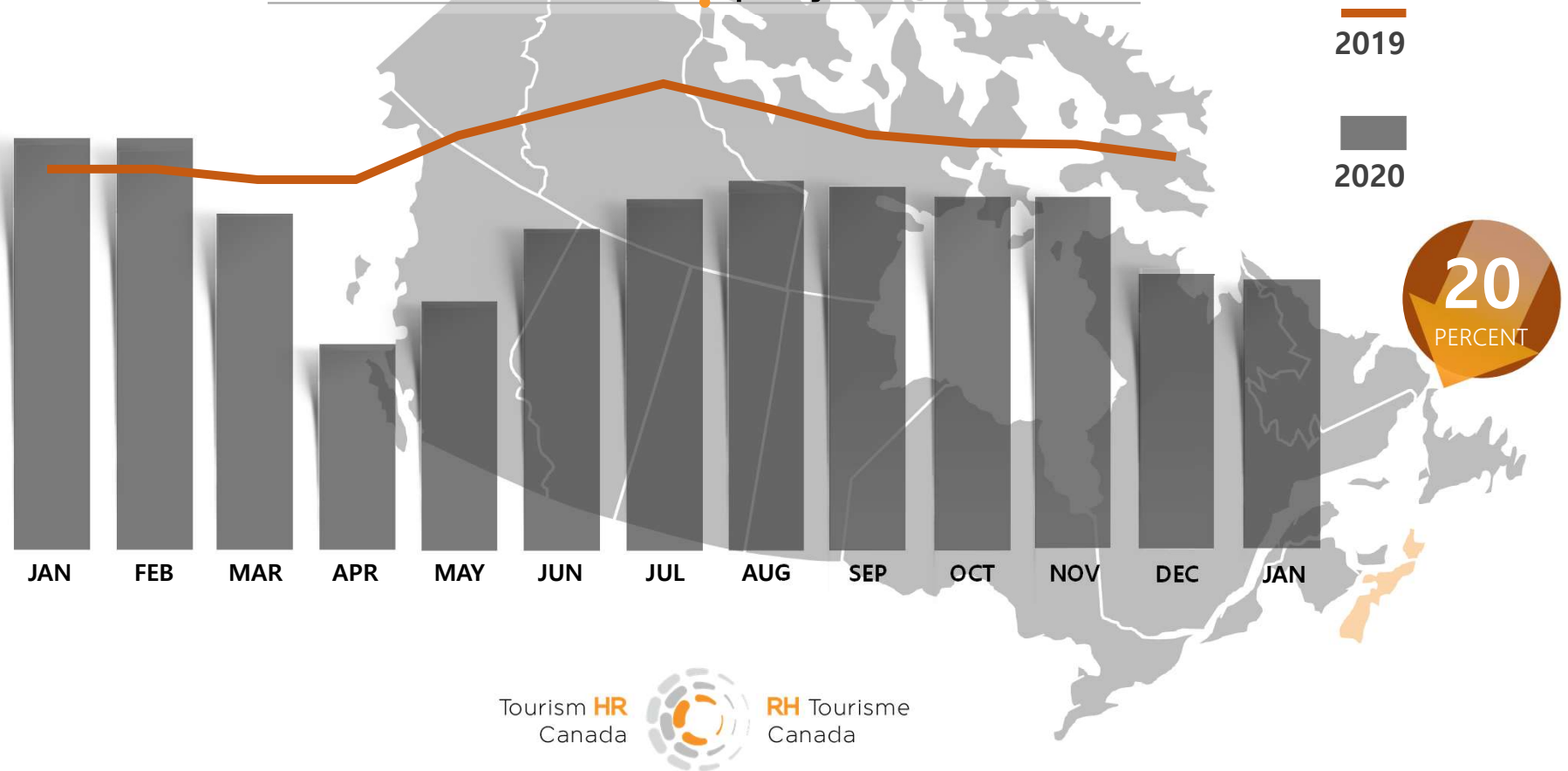


Manitoba Tourism Employment

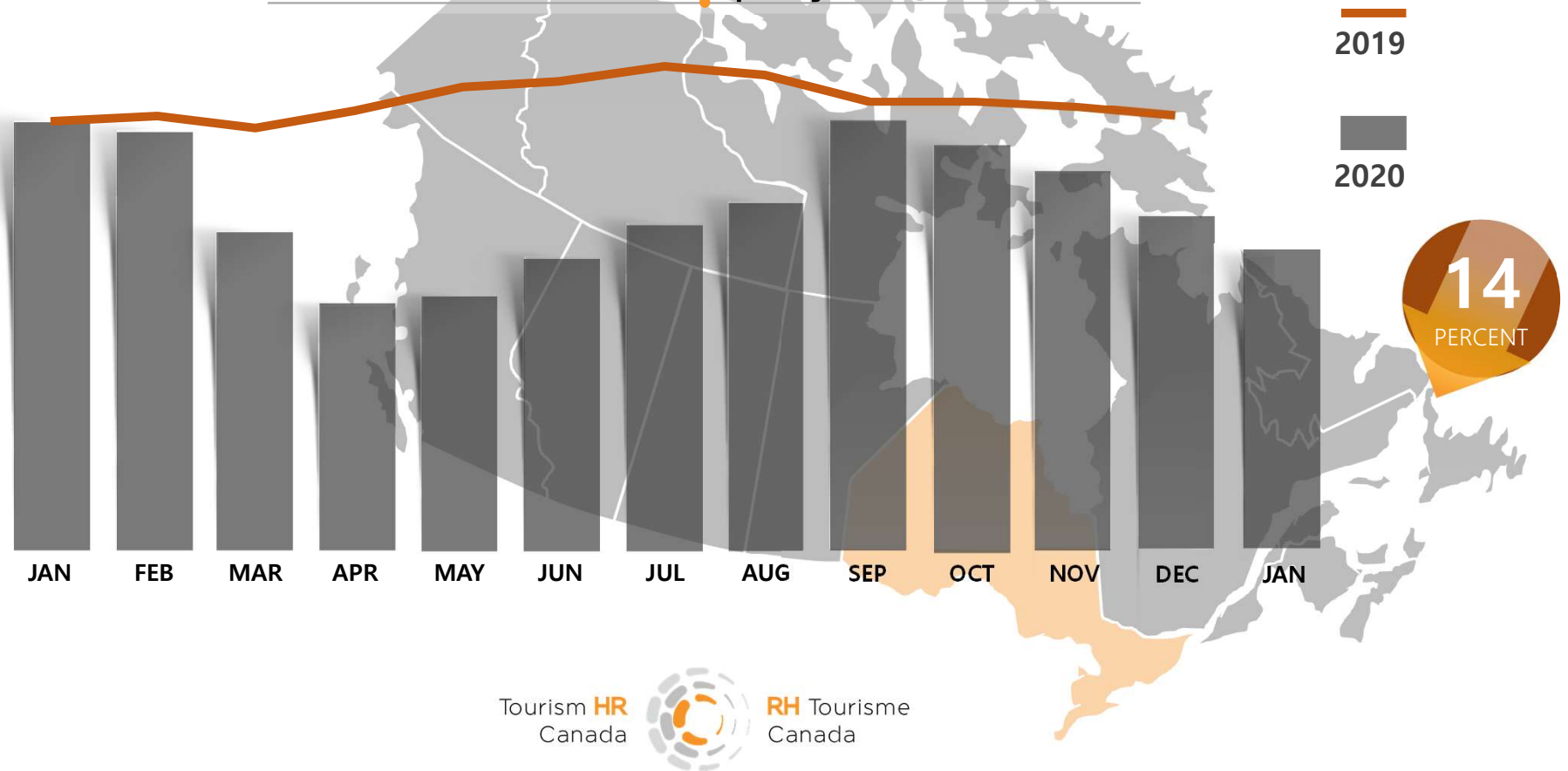


Source: Statistics Canada, Customized Labour Force Survey

Nova Scotia Tourism Employment



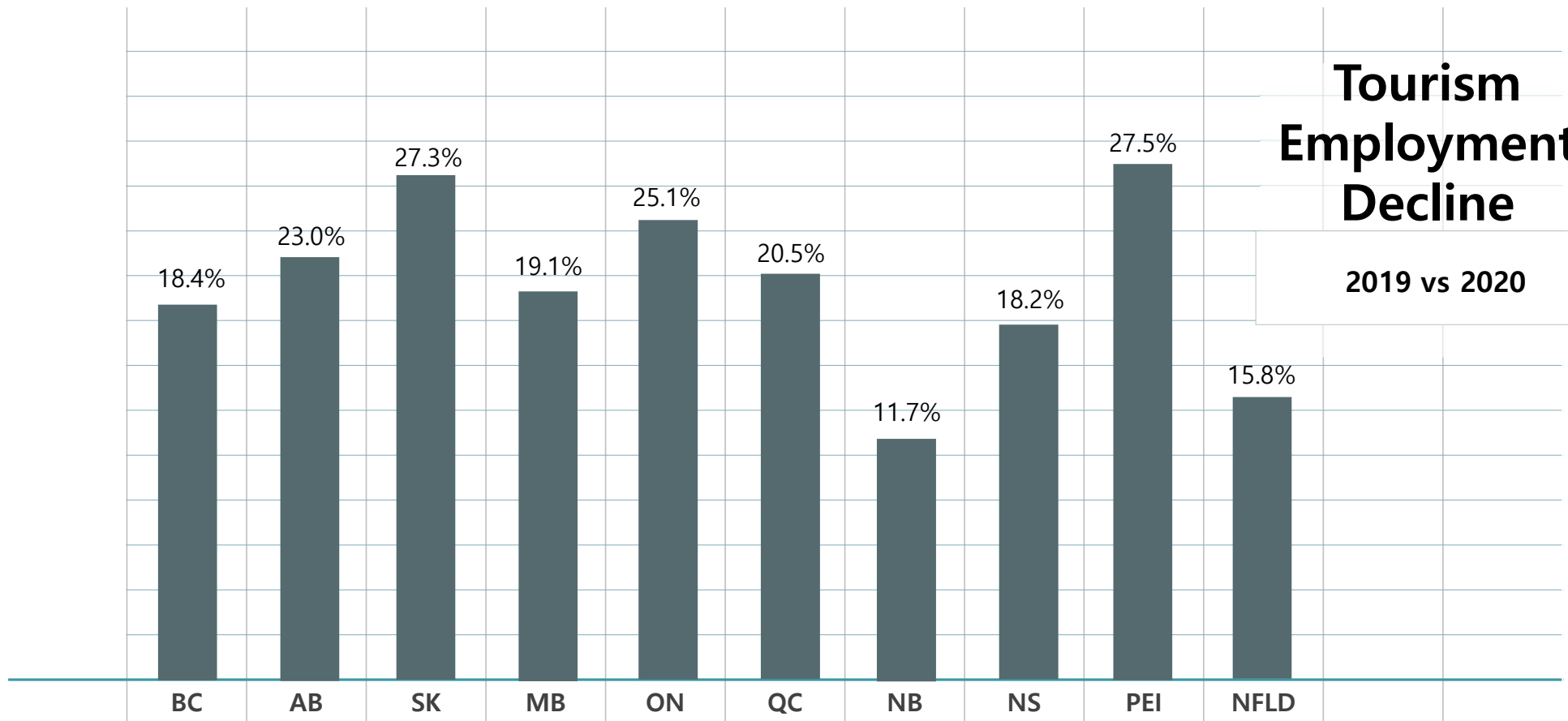
Ontario Tourism Employment



Source: Statistics Canada, Customized Labour Force Survey

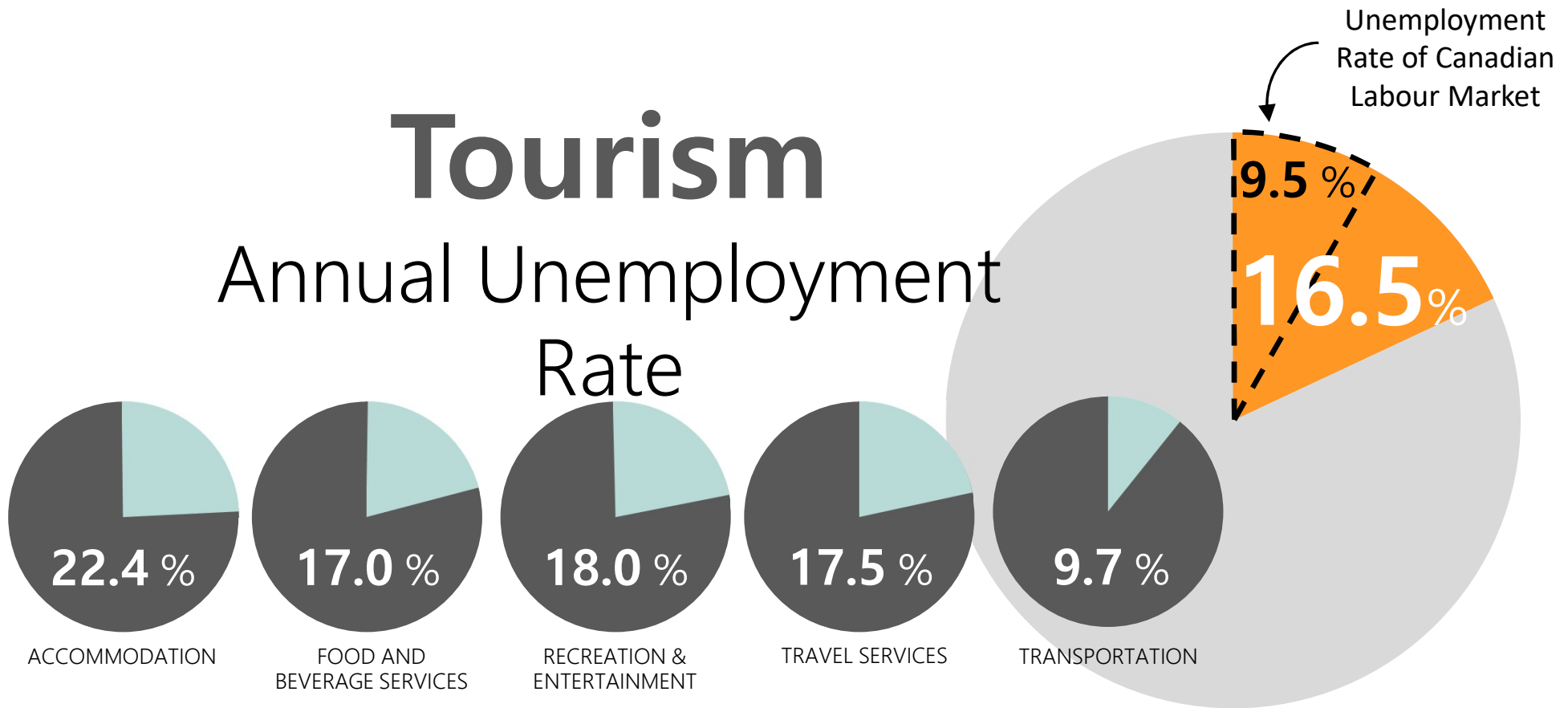
Tourism Employment Decline

2019 vs 2020

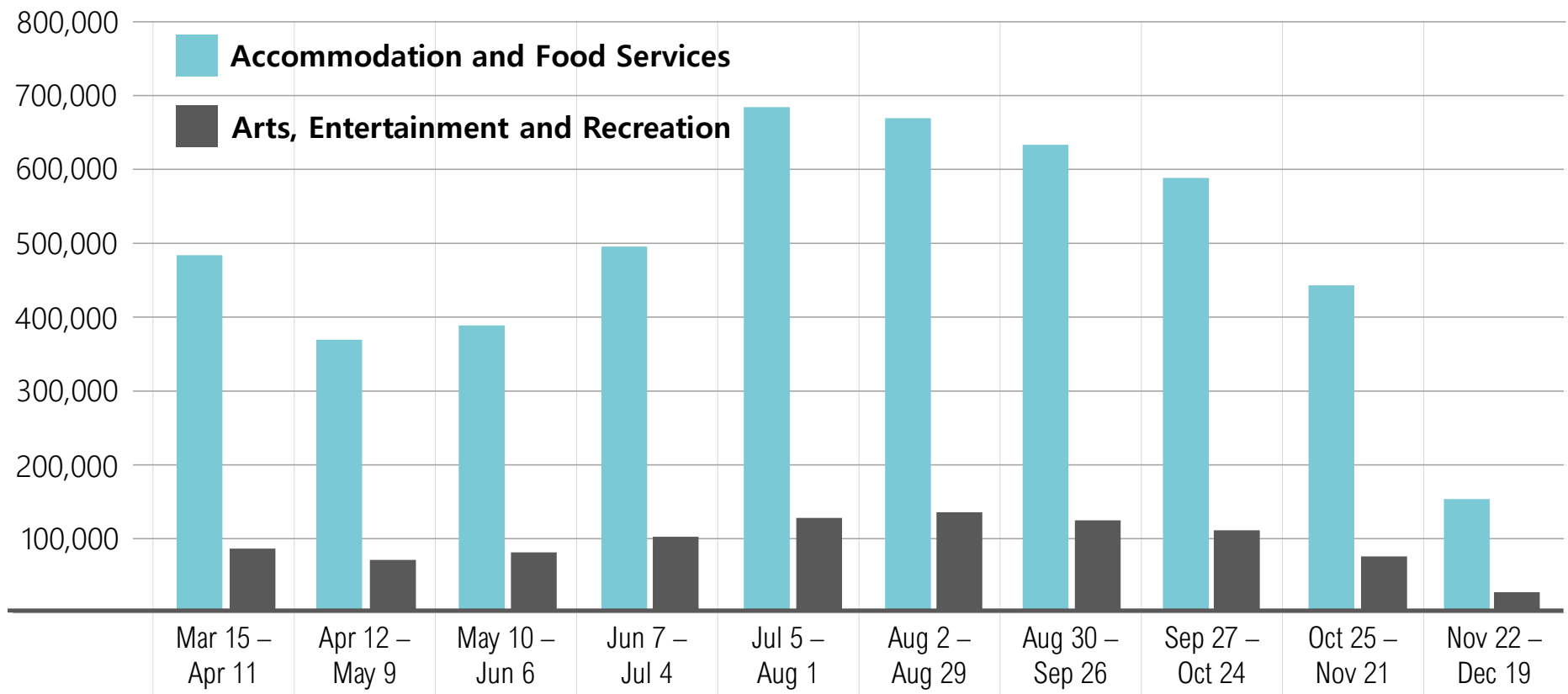


Tourism

Annual Unemployment Rate

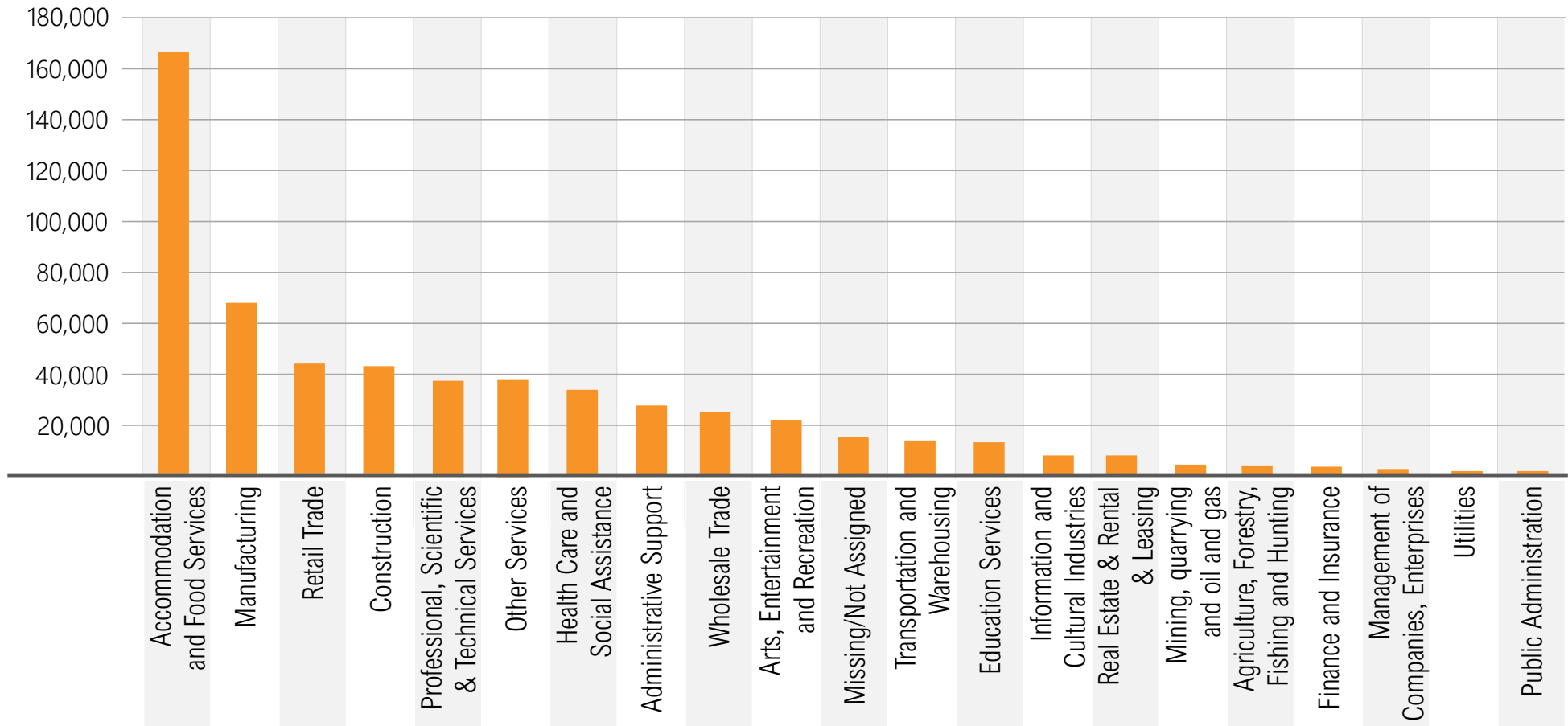


Approved **Canada Emergency Wage Subsidy** (CEWS) Claims by Period and Industry Sector, Canada – **Total Employees Supported**



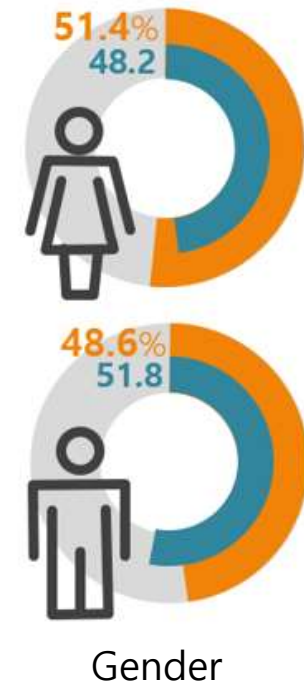
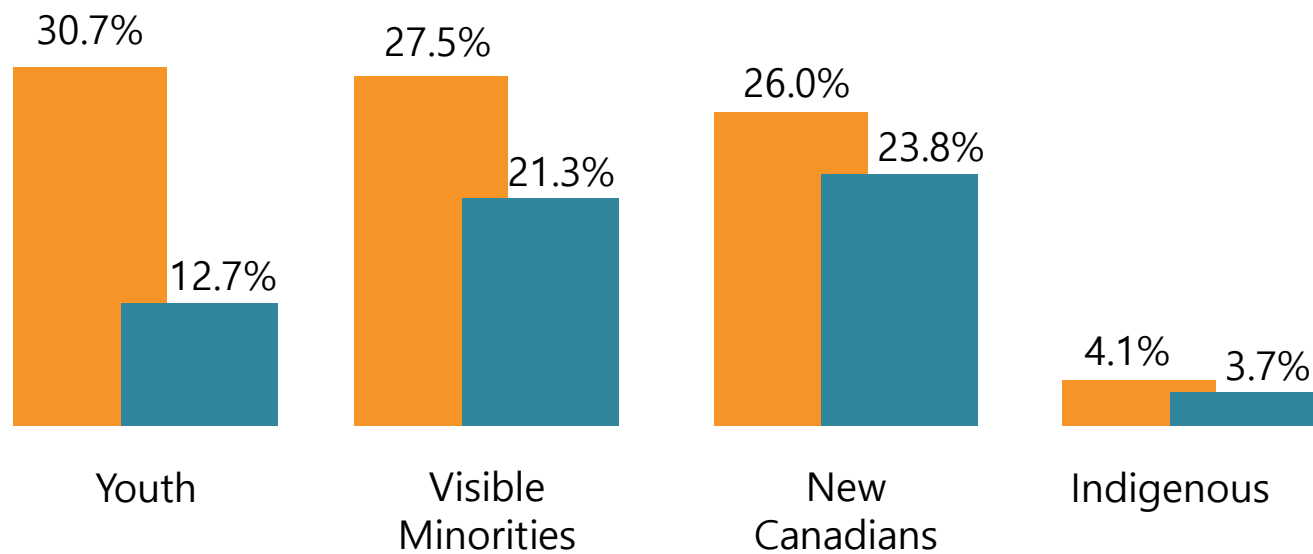
Source: Government of Canada Approved Canada Emergency Wage Subsidy (CEWS) Claims by Period and Industry Sector Canada

Number of Employees Supported by CEWS



Source: Government of Canada Approved Canada Emergency Wage Subsidy (CEWS) Claims by Period and Industry Sector Canada

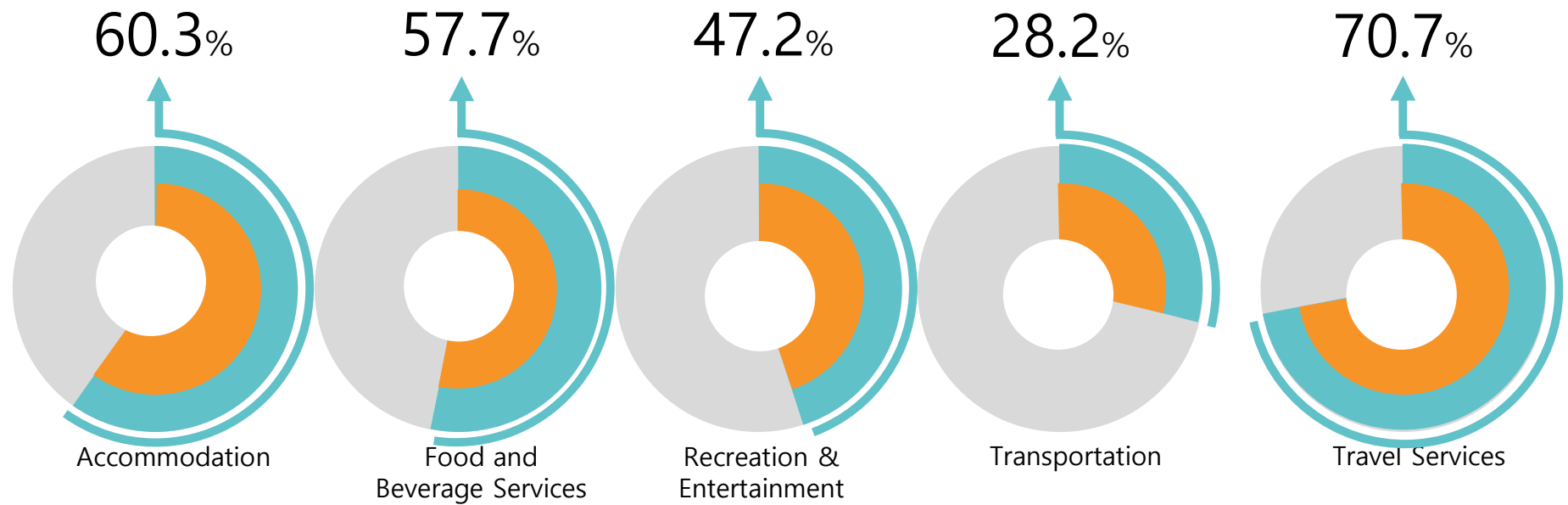
Heterogeneity



■ Tourism
■ Canadian Labour Market

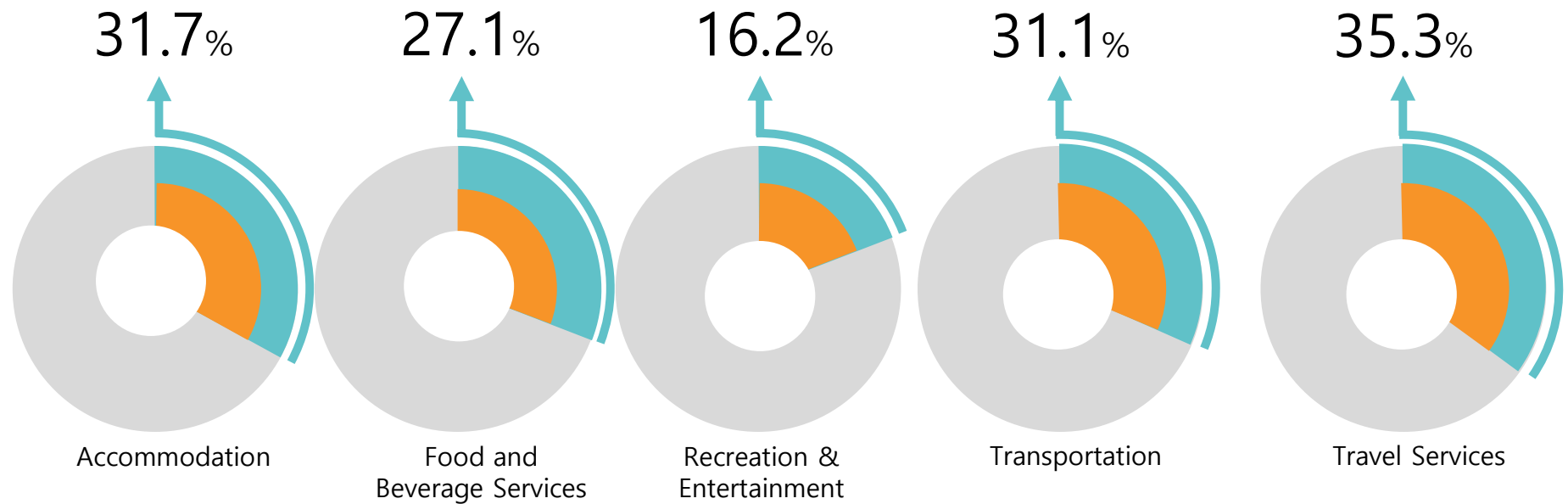
Gender

■ Percent of Jobs Held by Women



Immigrants

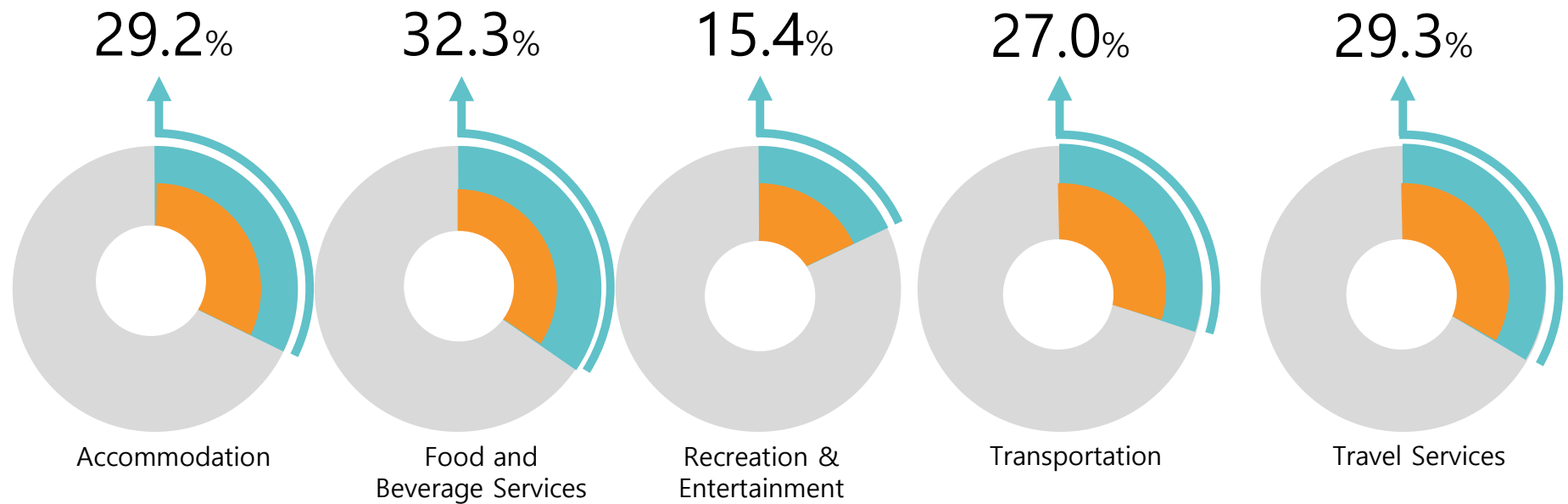
■ Percent of Jobs Immigrants



Source: Statistics Canada: Customized Census Tabulations

Visible Minorities

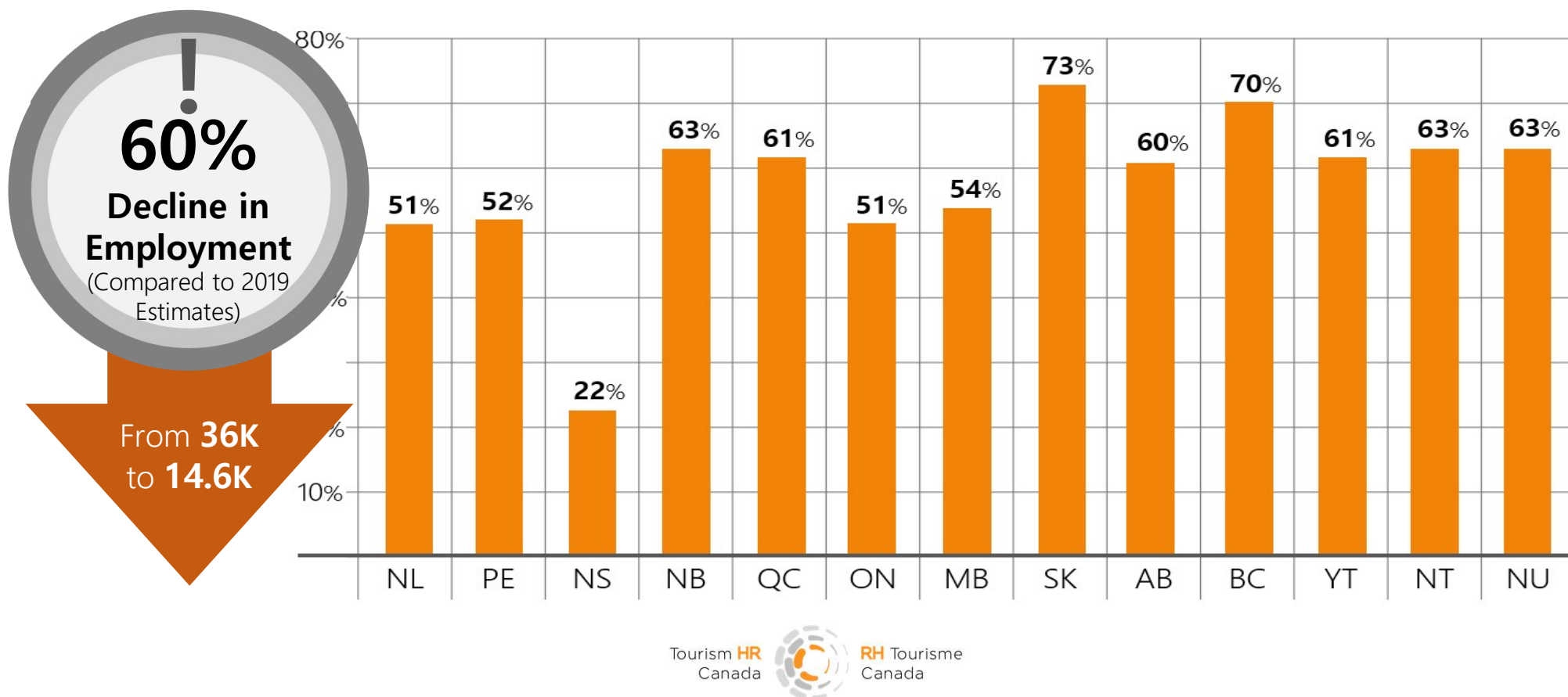
■ Percent of Jobs Held by Visible Minorities



Source: Statistics Canada: Customized Census Tabulations

Alarming Impact on Indigenous Workforce

REGIONAL BREAKDOWN OF 2020 JOB LOSSES



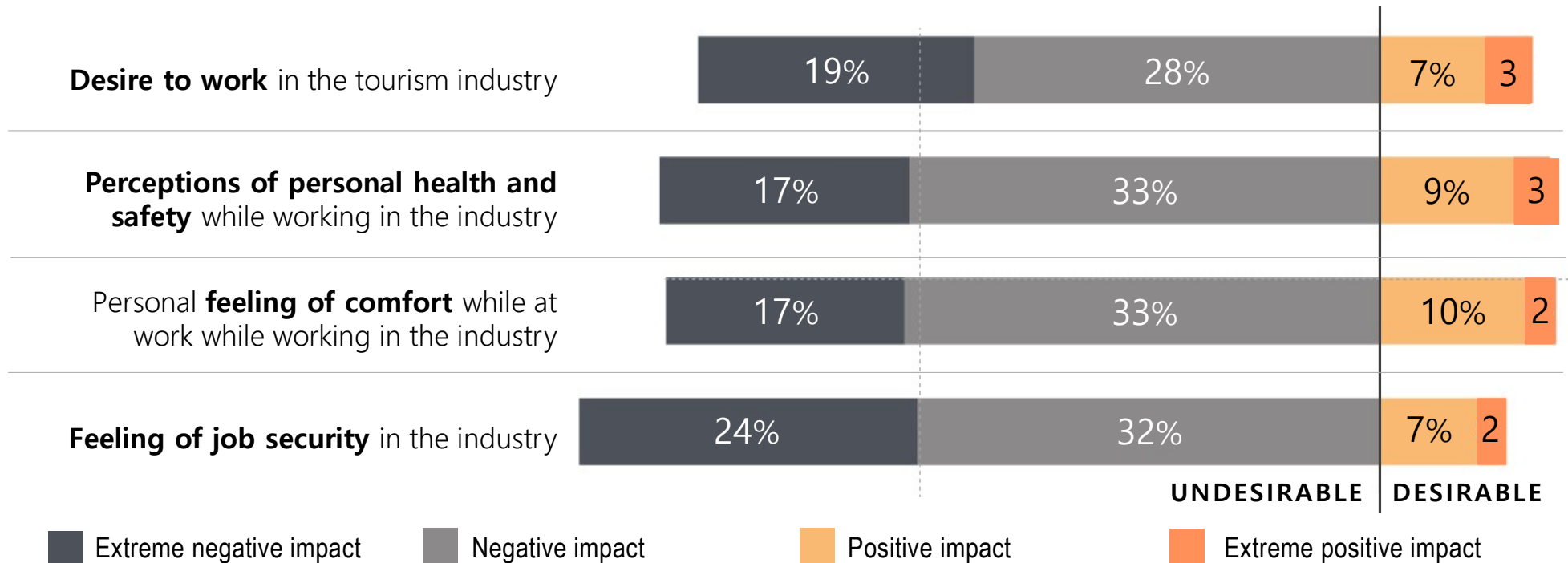
Source: Indigenous Tourism Association of Canada , Impact of COVID-19 (June 2020)

Job Postings Most Affected

National Occupation Code	Change Canada-Wide, 2019 to 2020
Travel counsellors	-72%
Airline ticket and service agents	-64%
Pursers and flight attendants	-63%
Support occupations in accommodation, travel and facilities set-up services	-62%
Casino occupations	-61%
Conference and event planners	-56%
...	...
Cooks	-31%
Food and beverage servers	-31%
...	...
Landscaping and grounds maintenance labourers	-4%
Bus drivers, subway operators and other transit operators	-4%
Light duty cleaners	+2%
Janitors, caretakers and building superintendents	+20%

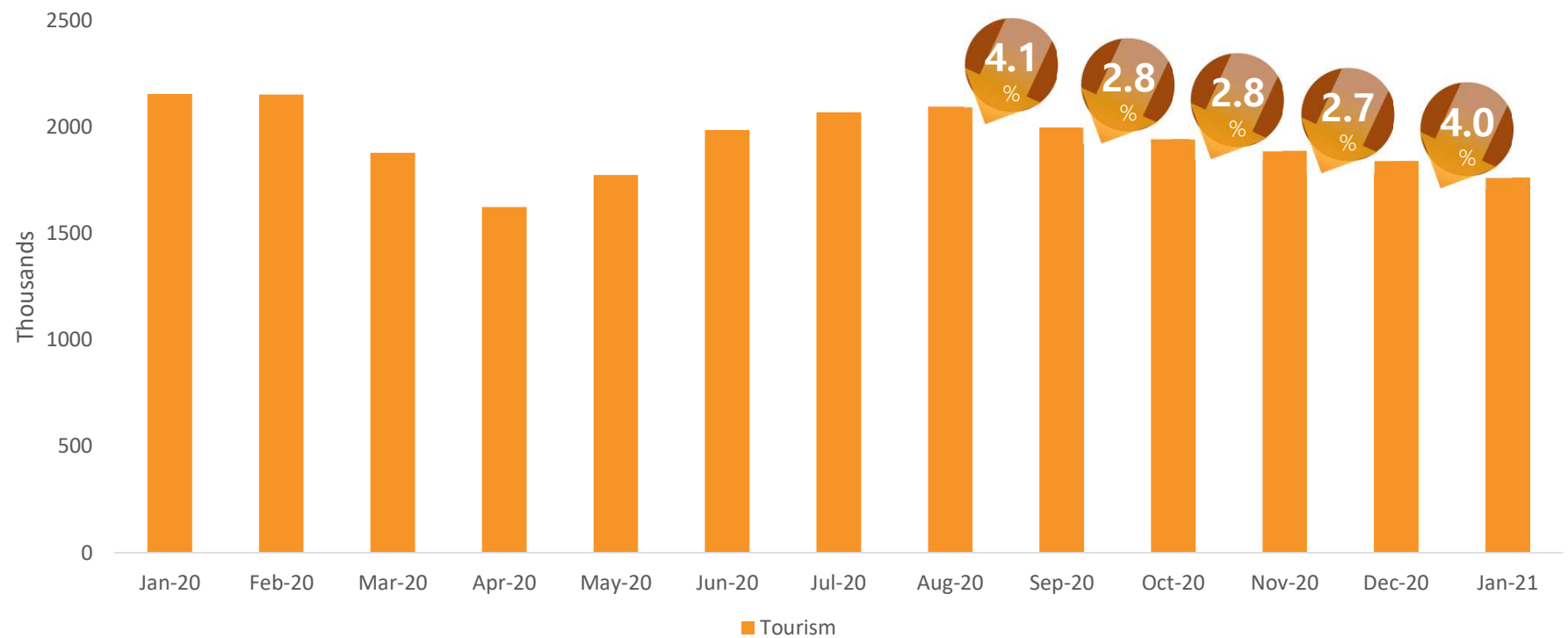
Impact of COVID-19 on Working in Tourism

To what extent has COVID-19 impacted each of the following:



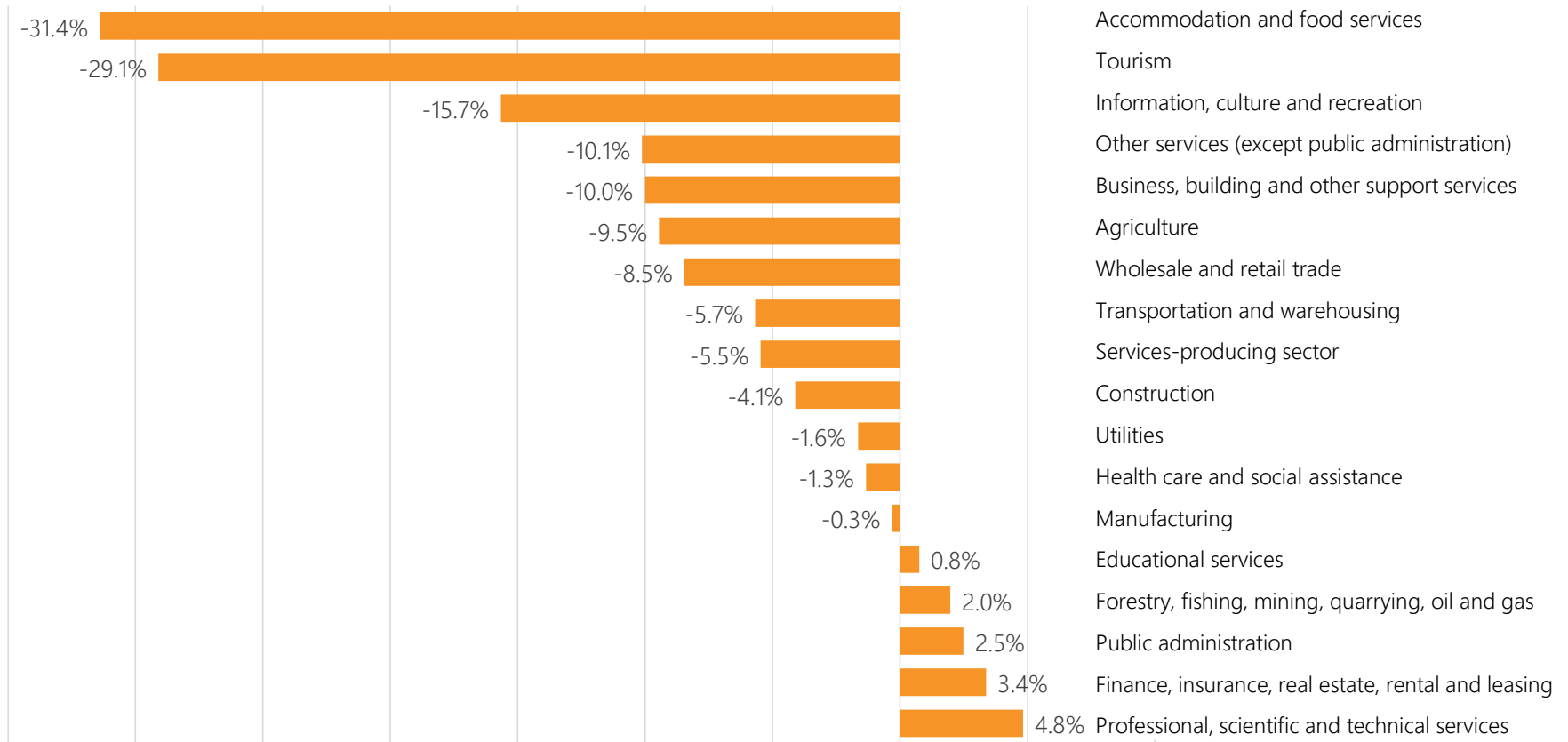
n = 1122 // Leger Study for Tourism HR Canada Conducted Nov 6 – 20, 2020
Note: bars do not equal 100% as neutral and don't know responses were removed. Numbers beside chart reflect top two desirable scores (somewhat and highly desirable)

Labour Force Decline



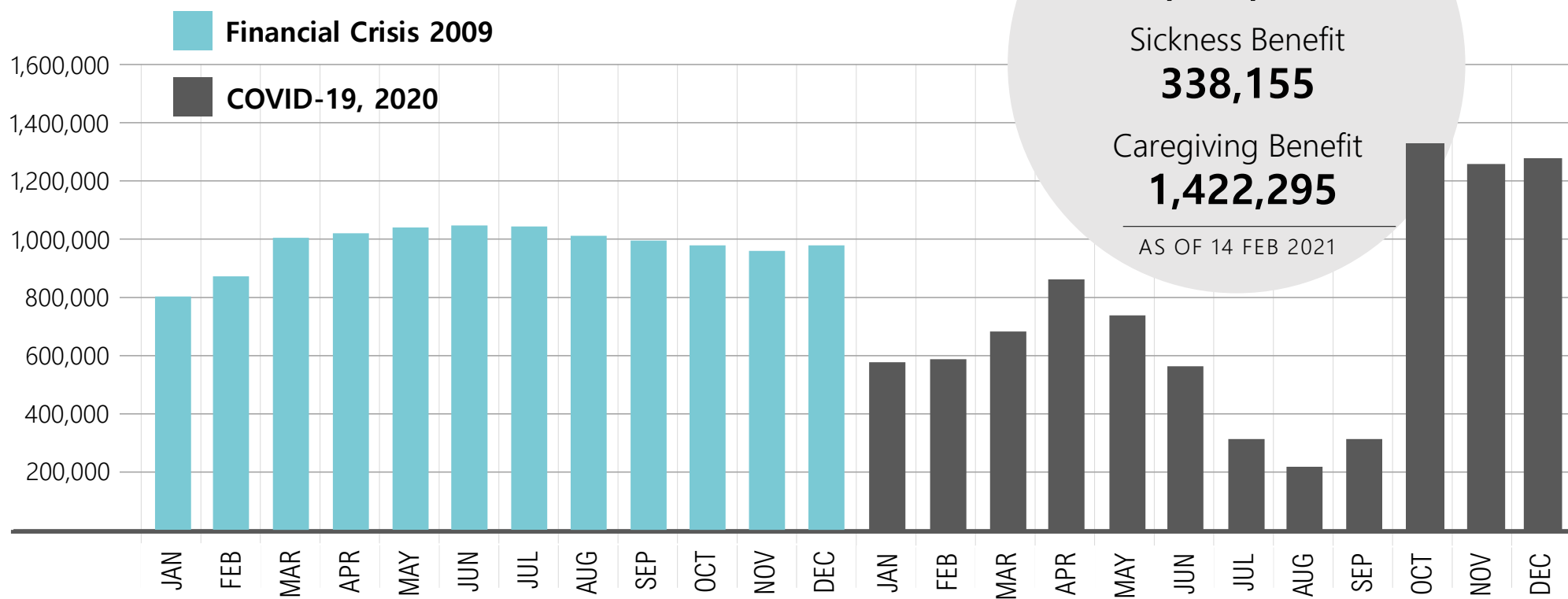
Source: Statistics Canada, Labour Force Survey Customized Tabulations

Percent Change in Employment by Sector February to January



Source: Statistics Canada, Labour Force Survey Table 14-10-0036-01 unadjusted for seasonality

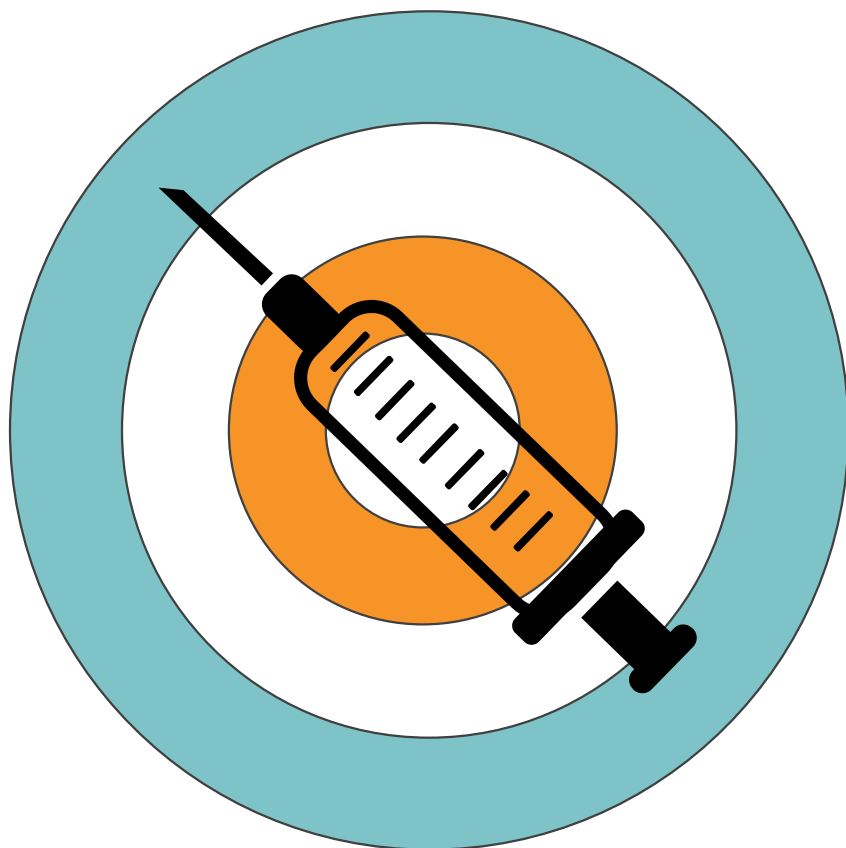
Employment Insurance Beneficiaries



The Impact of Covid-19 Going Foward



Vaccination – As of March 7th



	%
British Columbia	4.4%
Alberta	4.3%
Saskatchewan	5.4%
Manitoba	4.3%
Ontario	4.2%
Quebec	6.2%
New Brunswick	2.8%
Nova Scotia	2.5%
Prince Edward Island	5.0%
Newfoundland & Labrador	3.1%
Nunavut	22.3%
Northwest Territories	33.8%
Yukon	31.5%

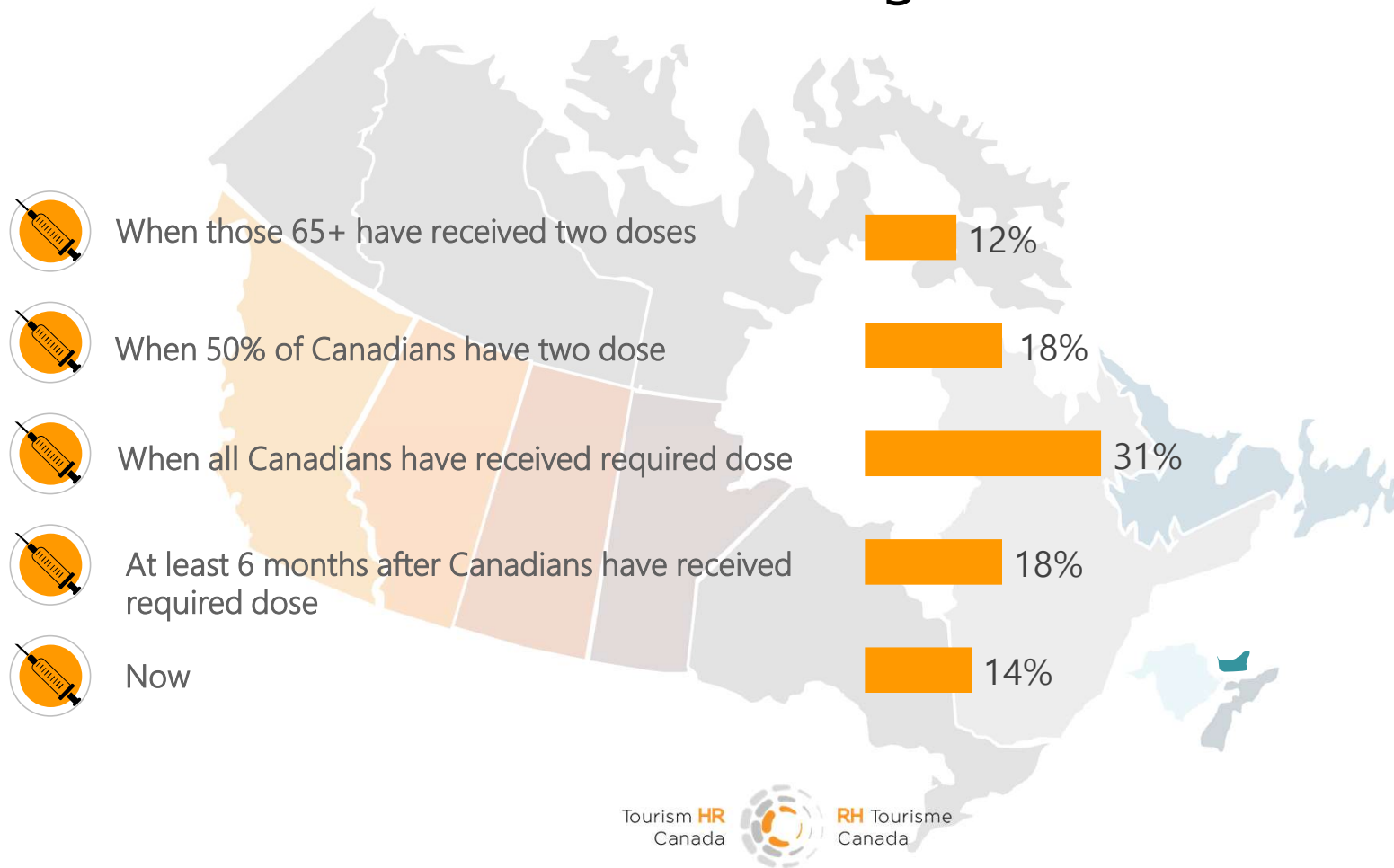
Tourism **HR**
Canada



RH Tourisme
Canada

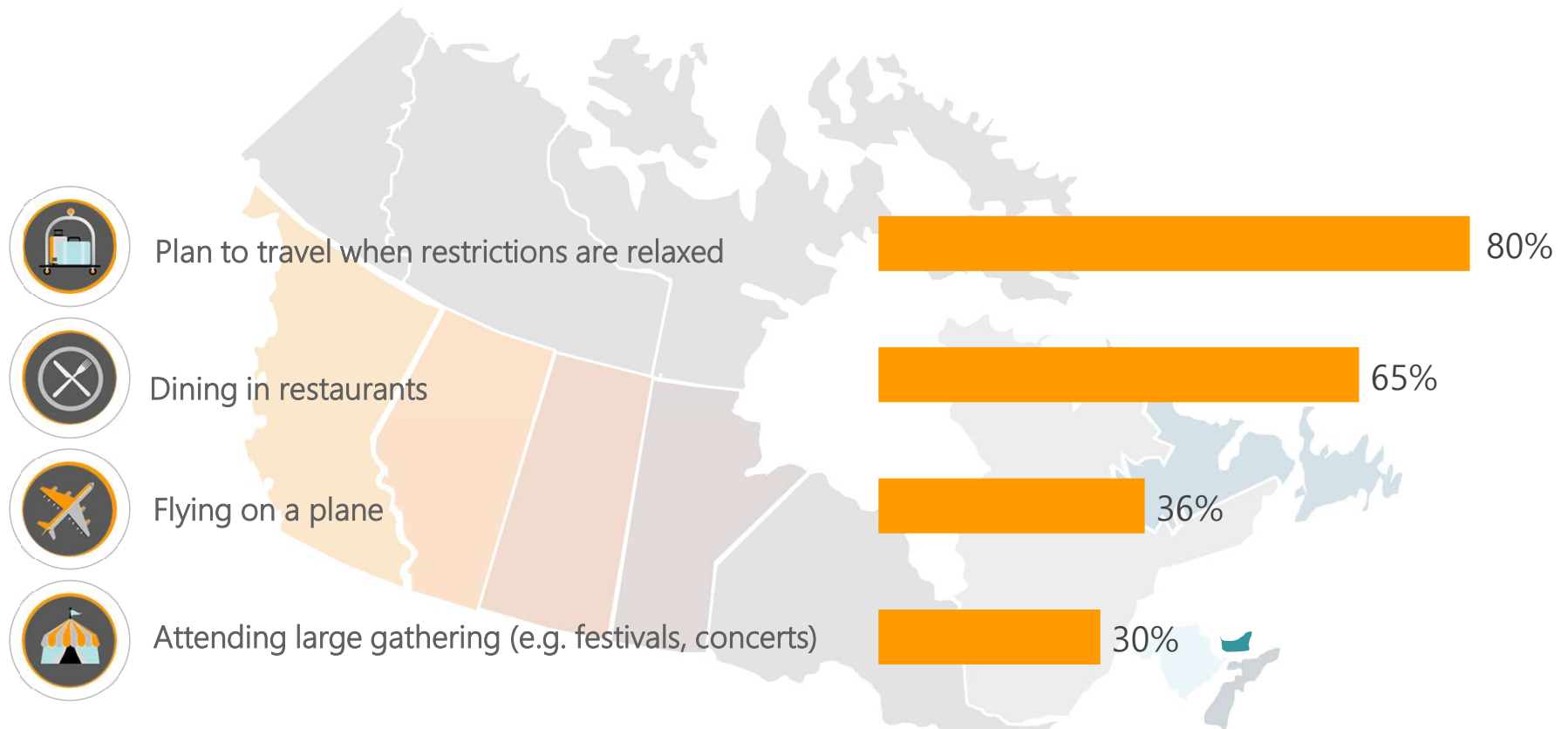
Source: CTV, Covid Vaccination Tracker – March 7th & Provincial Health Websites

Comfort with Ending Restrictions



Source: Leger, Leger's North America Tracker, March 1st

Comfort with Activities



Source: Destination Canada, Global Tourism Watch & Leger Pandemic Tracker Comfort with Activities

Mobile Work

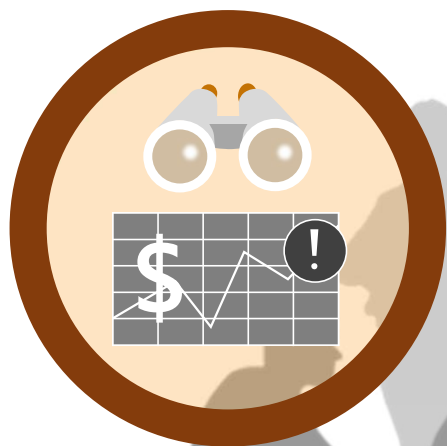
30% of Businesses Say **Half or More** will Continue Remotely Working **after** Covid-19

All Industries

30.3%

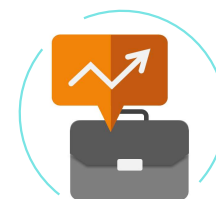


Virtual Business



▶ Below 2019 in 2024

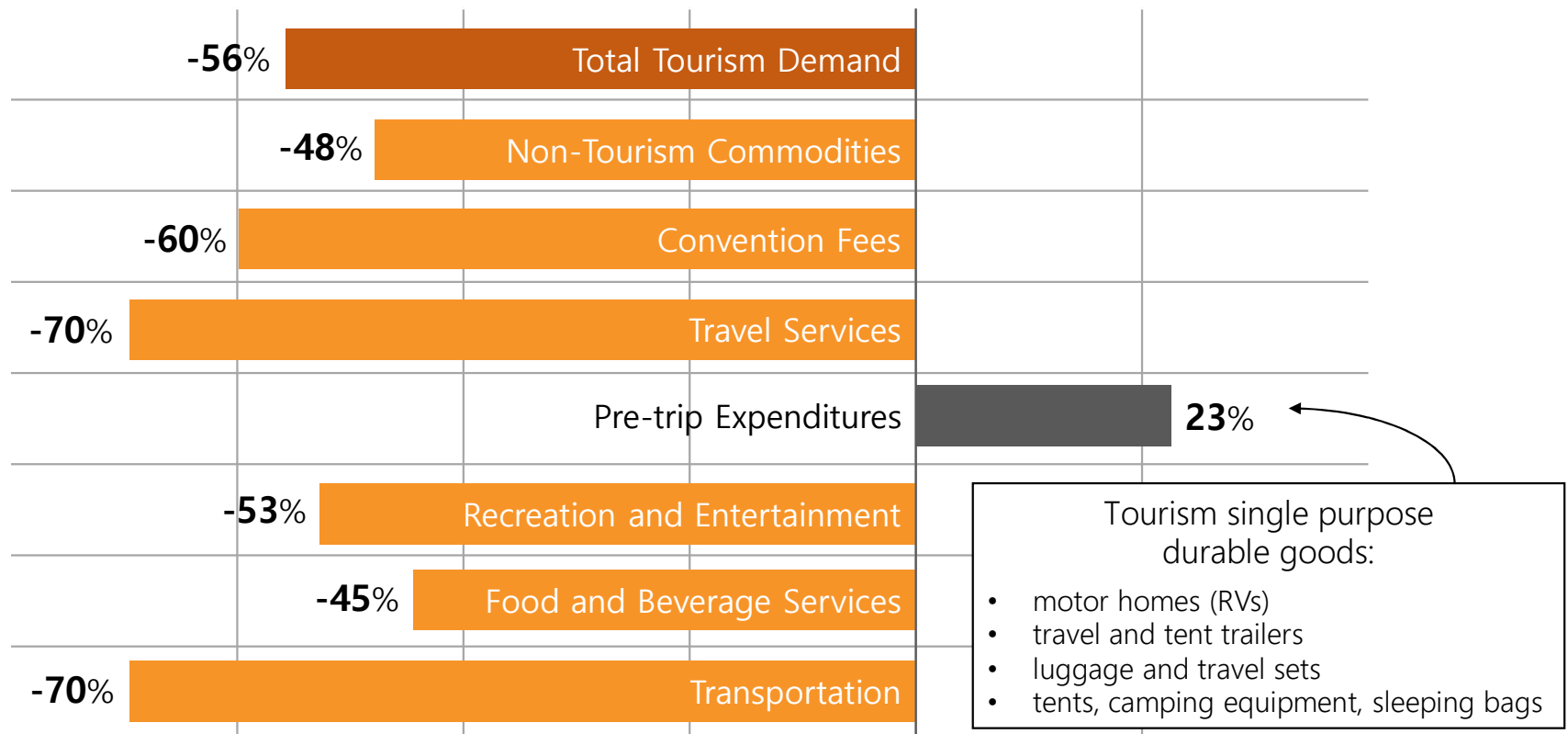
▶ Potential 20% Lost



Source: Conference Board of Canada, Travel Market Outlook
Source: McKinsey, The Future of Work after Covid-19

Tourism Expenditures (Canada)

Domestic and International Sources Q3 2020



HELP SHAPE TOURISM'S POST-COVID FUTURE

Employer & Employee **Consultation Sessions**



How To Get Workers Back To Tourism?



Supply



Job Security



Better Pay



Career Pathways

What is needed to **Ramp Up** the workforce for reopening?



Supply



Training



Funding

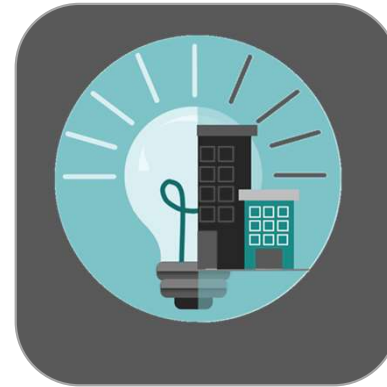


HR Protocols

Supports Needed to Adapt to Uncertainty?



**Ongoing
Financial
Support**



**Expand
Product
Development**



**Clear
Messaging
and Protocols**

The Post Covid Future of Tourism



Demand for both COVID-safe and 'social proximity' services persist in the medium term



Domestic and outdoor tourism will remain heightened in short term



International tourism will be slower to recover



Access to real-time data will be invaluable



The Post Covid Future of Tourism

Supply of Workers



Individuals will continue to be cautious about accepting work in the industry



Economic and demographic groups have been affected and will recover differently



Some negative perceptions of work in the sector have been exacerbated by COVID



Mixed levels of demand by region and industry

labour
market
forum



forum sur le
marché du
travail

Thank You

**We want to hear
from you.**

Please share your
thoughts with us.

Click on to the link
in the Chat function