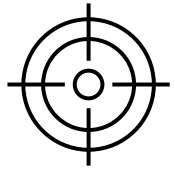


Will the tourism workforce show up for the recovery?

March 15, 2021

Presented by Sylvie Baillargeon, Project Manager - Research and Analysis
Conseil québécois des ressources humaines en tourisme (CQRHT)

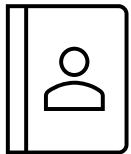
Notes about the study



GOALS

To understand the impacts of COVID-19 on tourism workers in order to inform discussions about the priority action most likely to:

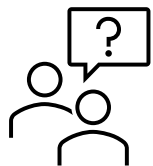
- Help the industry retain its skilled and qualified workers needed to begin the recovery process in a timely manner; and
 - Accompany and support the workforce through the transitional phase.
-



METHODS

- Data collection period: September 3-27, 2020, just prior to the 2nd wave's lockdown measures.
- Web survey via the LimeSurvey platform aimed at workers who are or were employed in the tourism industry between January and September 2020.
- 3,022 participants.
- Non-probability sampling, i.e. respondents were recruited in a non-random way.

Notes about the study (cont'd)



REPRESENTATIVENESS

The sample includes an over-representation of workers from:

- Accommodation and travel services occupations
- Supervisory and managerial occupations, and professional and administrative positions
- Career workers (relatively few younger employees and students)

In order to provide the most accurate portrayal of the situation, cross-tabulations by sectors and occupational groups are provided.

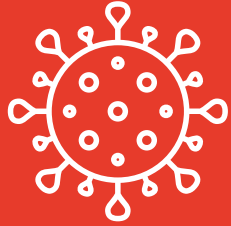


ACKNOWLEDGEMENTS

This study was made possible by the financial support of the Province of Québec's *Ministère du Travail, de l'Emploi et de la Solidarité sociale* (MTESS) and *Ministère du Tourisme* (MTO).

With the financial support of:





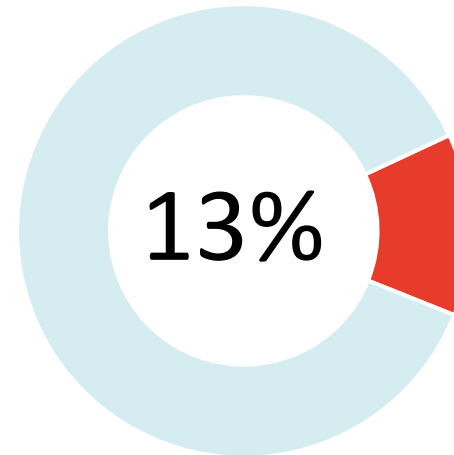
Current and Potential Losses of Workers by Sector



In the Food & Beverage Sector

RESTAURANT LAYOFFS: How many and which resources have we lost?

Right before
the 2nd wave
measures



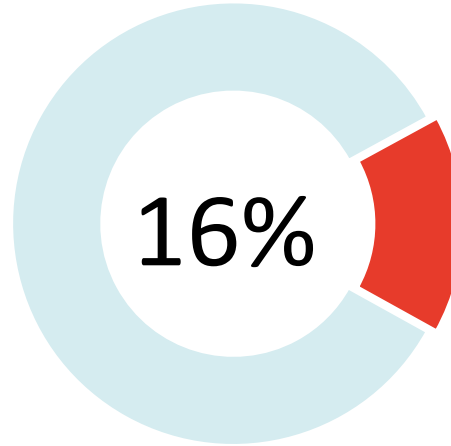
18% dining room workers
10% kitchen workers
9% supervisors/managers

31% in Montréal
22% in urban areas



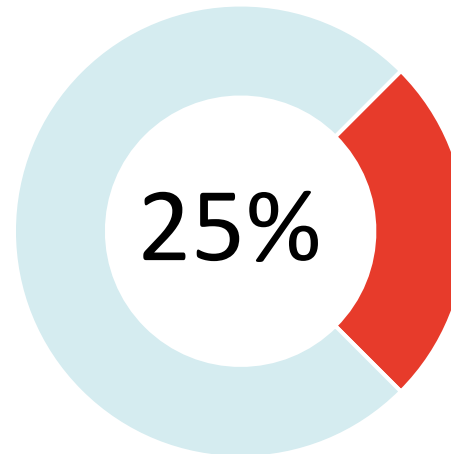
WORKER LOYALTY IN RESTAURANTS: How many and what resources could we lose?

I want to leave
the industry
within the next
12 months



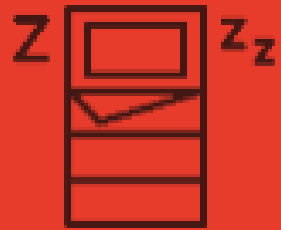
19% dining room workers
9% kitchen workers
20% supervisors/managers

I want to stay in
the sector but I
would like to
leave it in case of
permanent job
loss



A potential loss
of 41% to other
sectors!

1,083 subjects

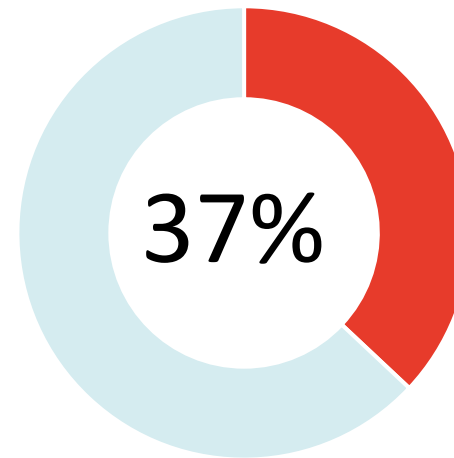


In the Accommodation Sector

HOSPITALITY LAYOFFS:

How many and which resources have we lost?

Right before
the 2nd wave
measures



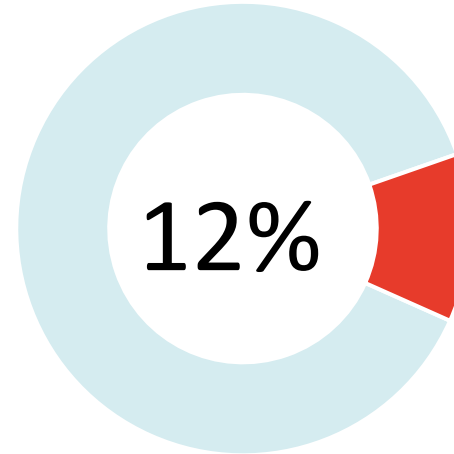
34% customer service
53% restaurant service
57% kitchen
45% maintenance
28% supervisors/managers
21% professional/administrative

53% in Montréal
46% in urban areas



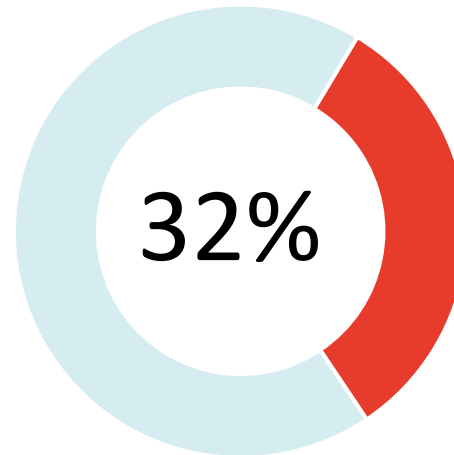
WORKER LOYALTY IN HOSPITALITY: How many and what resources could we lose?

I want to leave
the industry
within the next
12 months



10% customer service
10% restaurant service
14% kitchen
7% maintenance
15% supervisors/managers
16% professional/administrative

I want to stay in
the sector but I
would like to
leave it in case of
permanent job
loss

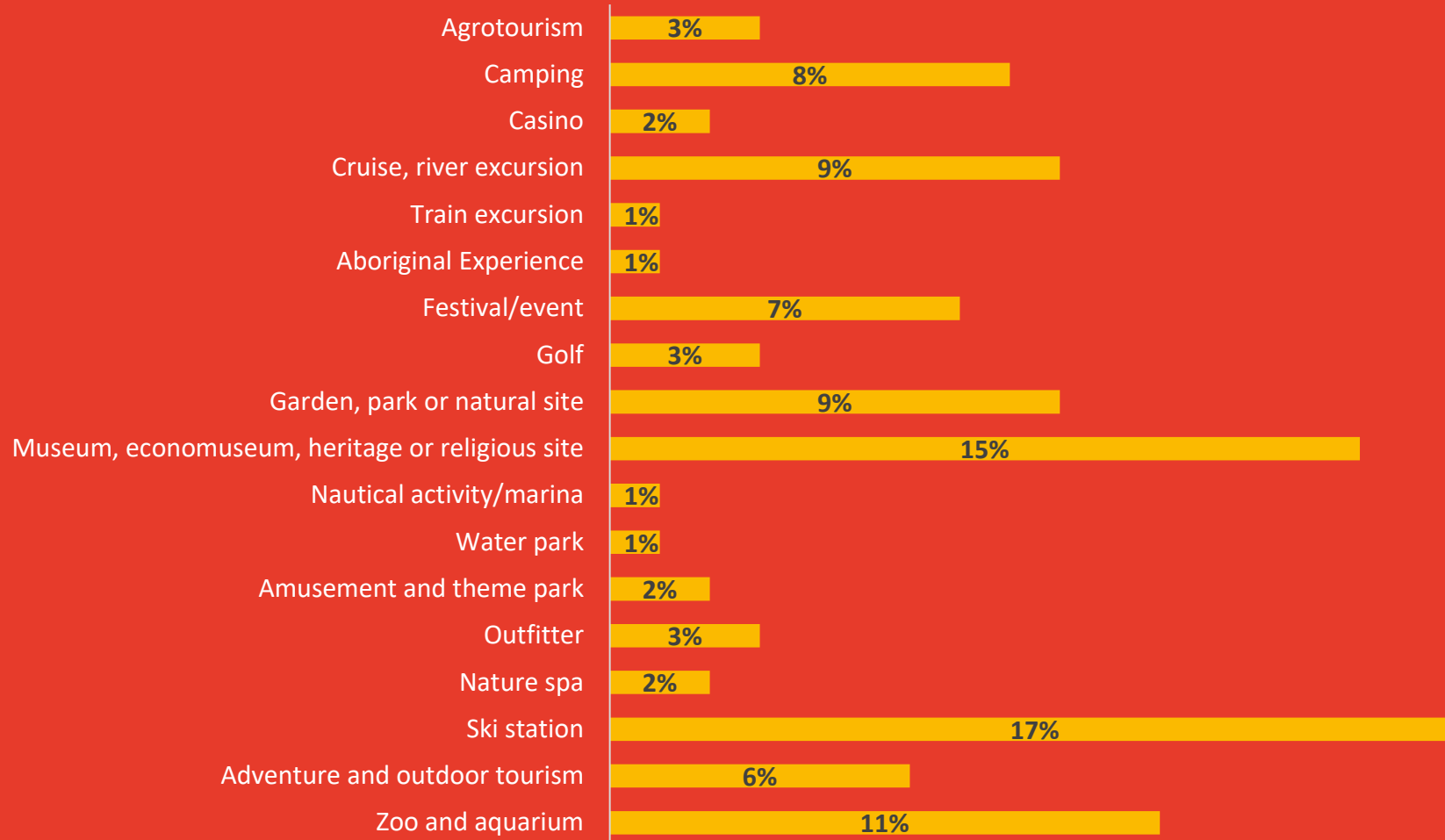


A potential loss
of 44% to other
sectors!



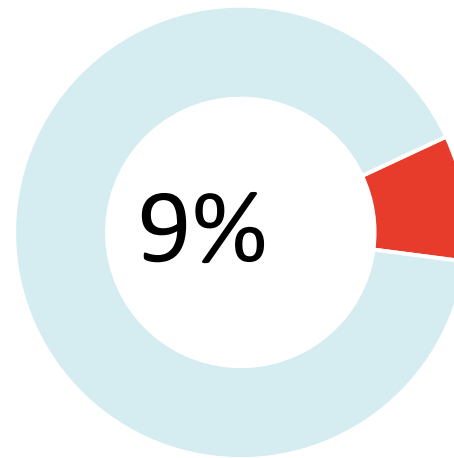
654 subjects

IN RECREATION AND ENTERTAINMENT AND OUTDOOR ACCOMMODATION



LAYOFFS IN RECREATION AND ENTERTAINMENT AND OUTDOOR ACCOMMODATION: How many and what resources have we lost?

Right before
the 2nd wave
measures



25% guides/monitors/animators

8% customer service

31% restaurant service

10% kitchen

3% maintenance

3% supervisors/managers

1% professional/administrative

25% in Montréal

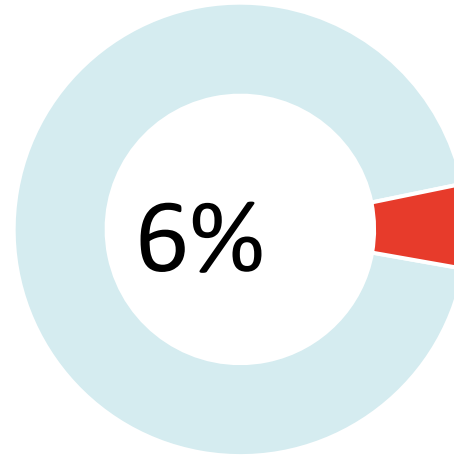
20% in urban areas



WORKER LOYALTY:

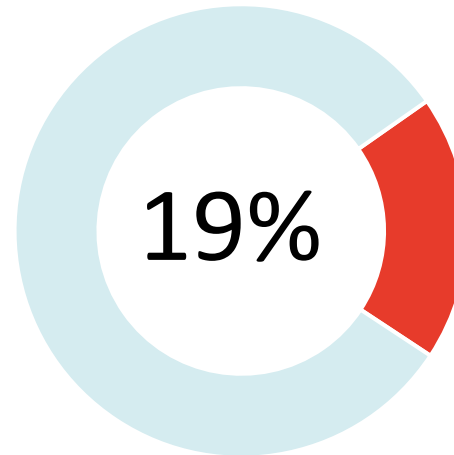
How many and what resources could we lose?

I want to leave
the industry
within the next
12 months

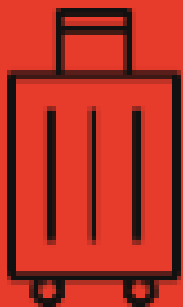


9% guides/monitors/animators
8% customer service
9% restaurant service
0% kitchen
2% maintenance
5% supervisors/managers
5% professional/administrative

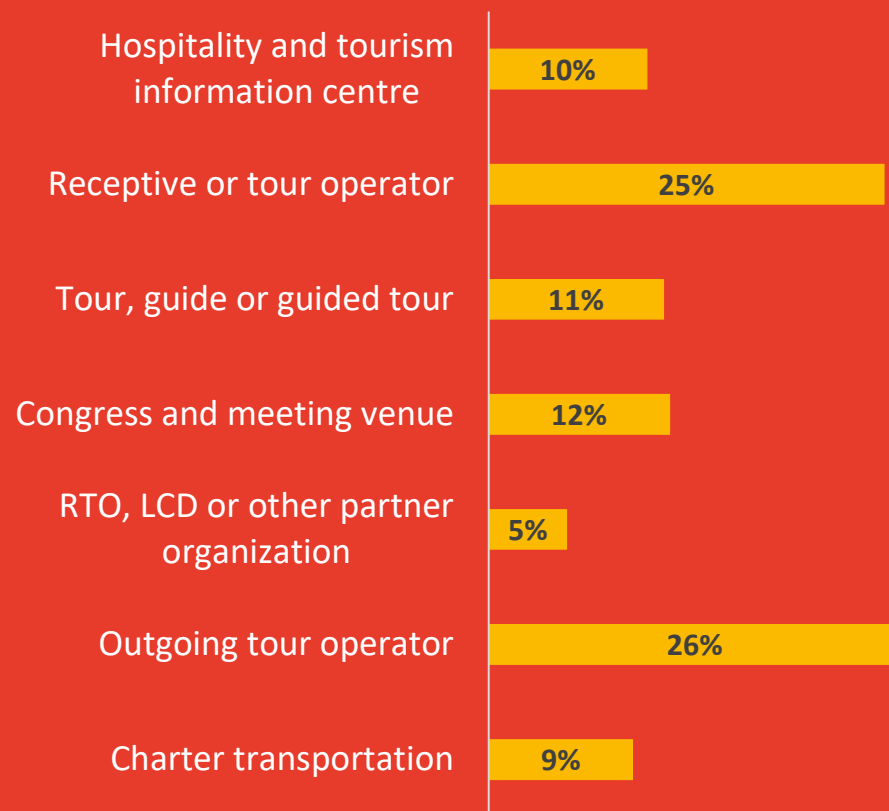
I want to stay in
the sector but I
would like to
leave it in case of
permanent job
loss



A potential
loss of 25% to
other sectors!

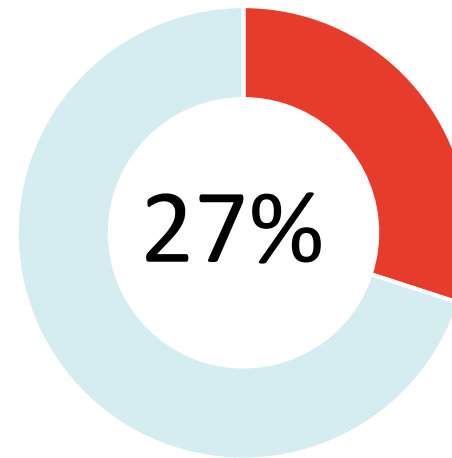


IN TRAVEL SERVICES



LAYOFFS IN TRAVEL SERVICES: How many and what resources have we lost?

Right before the
2nd wave
measures



20% guides*
14% tourist information officers
24% travel agents*
45% bus drivers
24% supervisors/managers
26% professional/administrative

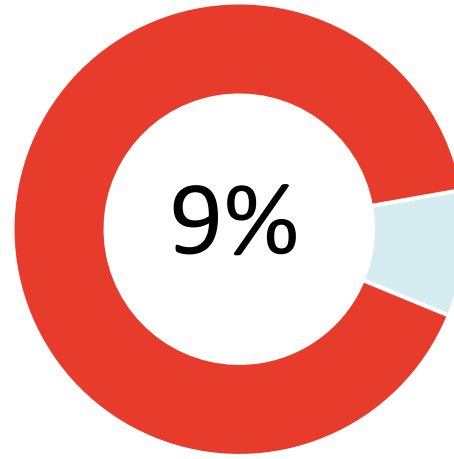
39% in Montréal
35% in urban areas



*As these occupations have a high proportion of self-employed workers, the scope of unemployment may be underestimated in these occupations.

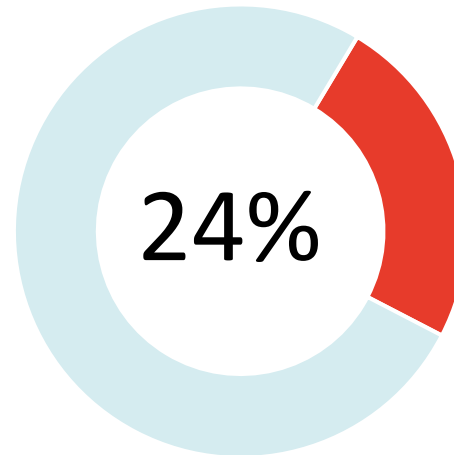
WORKER LOYALTY IN TRAVEL SERVICES: How many and what resources could we lose?

I want to leave
the industry
within the next
12 months



9% guides*
2% tourist information officers
6% travel agents*
8% bus drivers
15% supervisors/managers
10% professional/administrative

I want to stay in
the sector but I
would like to
leave it in case of
permanent job
loss

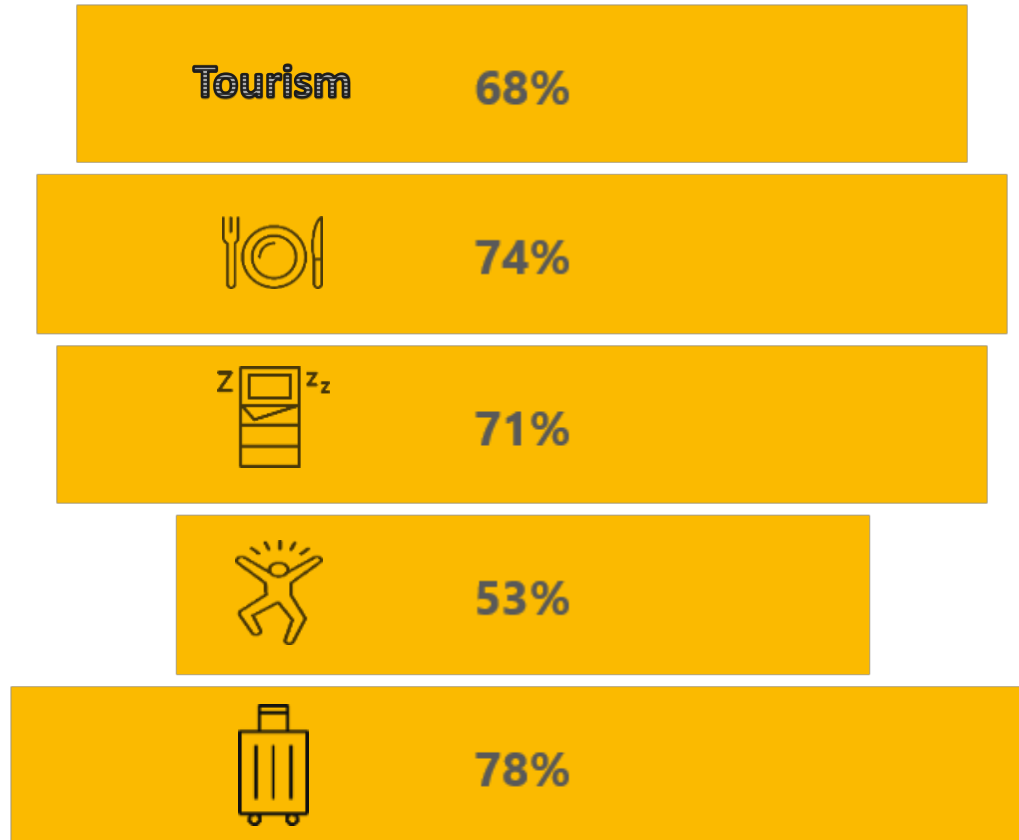


A potential loss
of 33% to other
sectors!

Factors that could Negatively Impact Retention and Attractiveness



INCREASED FINANCIAL INSECURITY



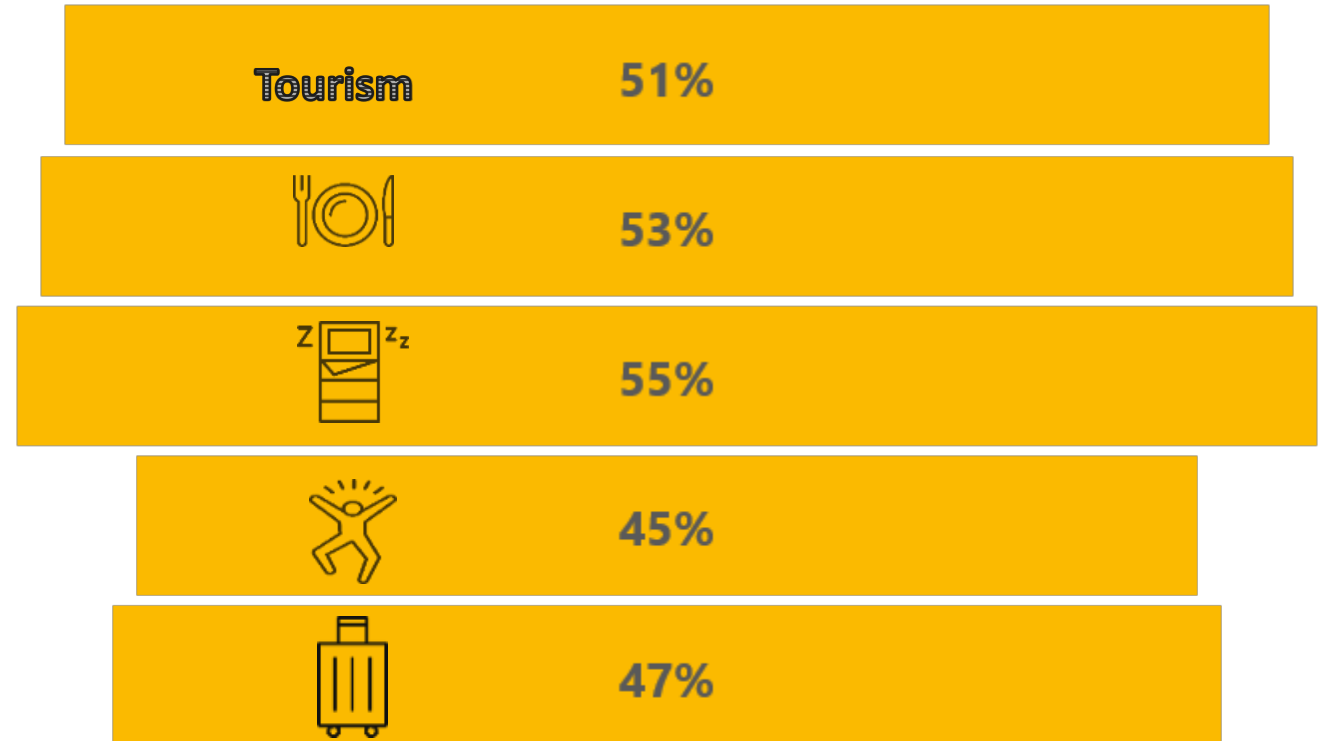
We want to stay, but we don't know what will happen in a week, a month or a year.

Worker

With such uncertainty, team dynamics become difficult. Motivation is at an all-time low.

Company representative

INCREASED INSECURITY ABOUT HEALTH AND SAFETY IN THE WORKPLACE

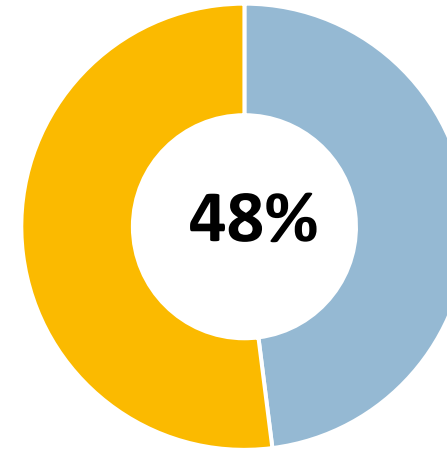
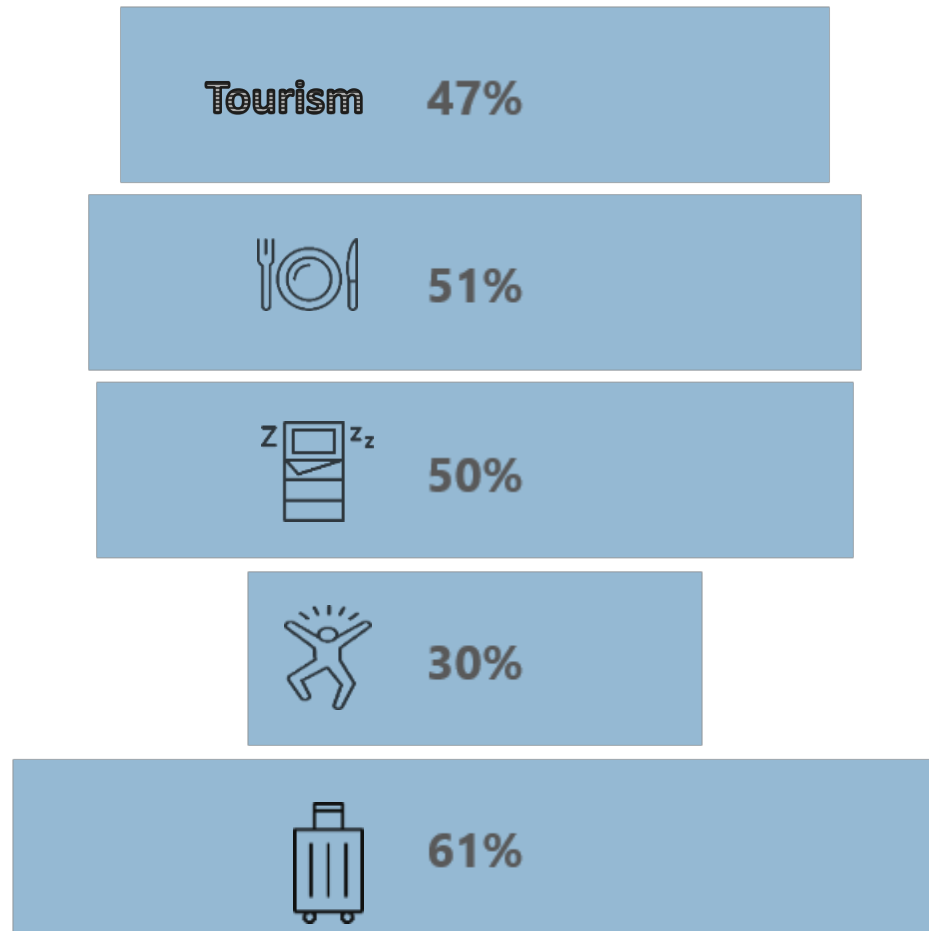


Our workers are developing psychosocial issues.

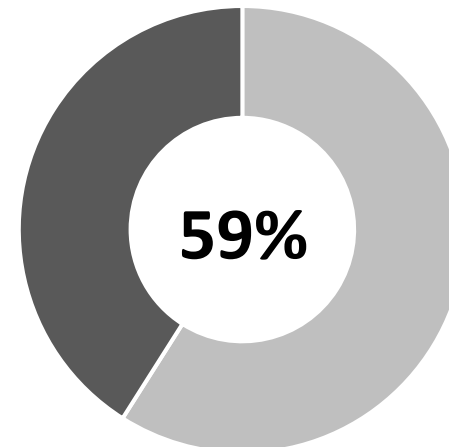
Their nerves are on edge. In addition, our workers have to deal with clients who are equally on edge.

Company representatives

DETERIORATING WAGE CONDITIONS DUE TO COVID

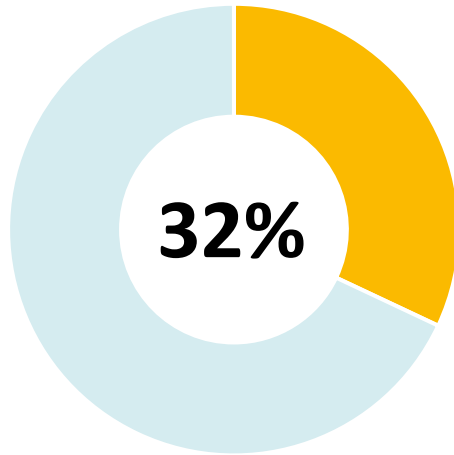


Worked fewer hours

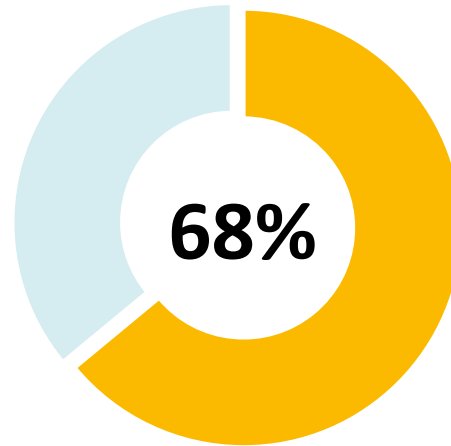


Of food service workers have seen their pay conditions deteriorate

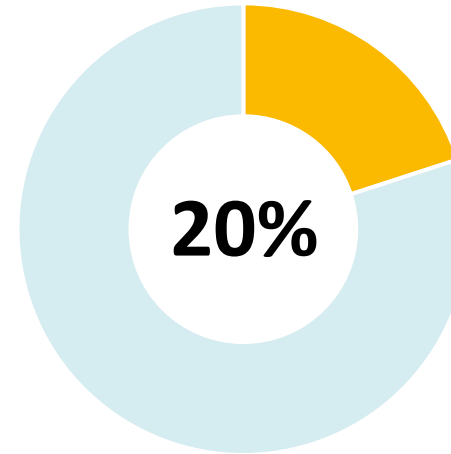
DETERIORATION OF WORK CONDITIONS



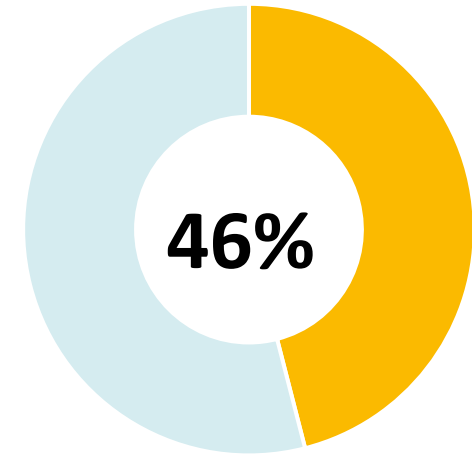
More duties



Heavier duties



Poor schedules













Heavier family constraints

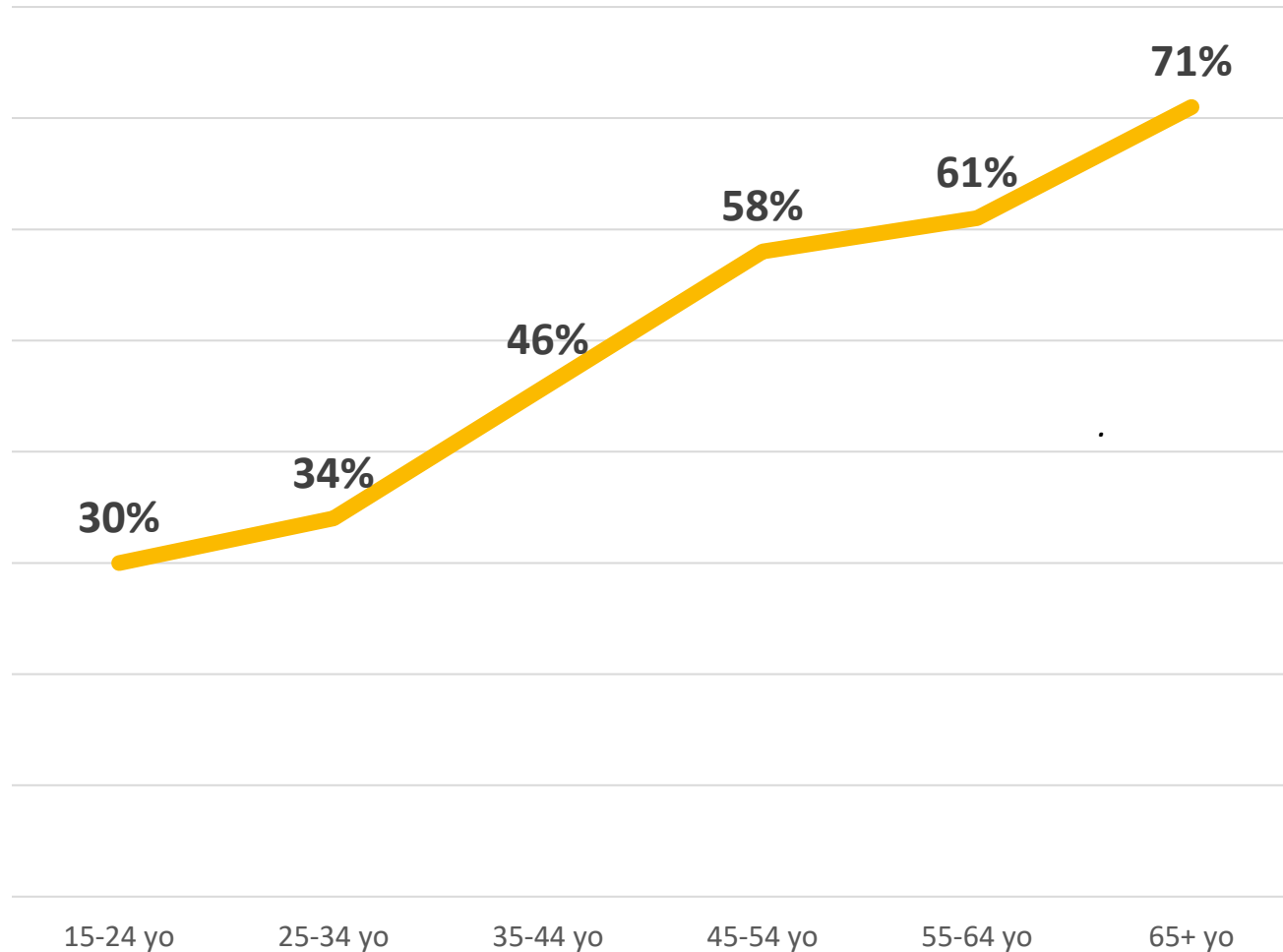


Risk Areas for the Recovery

THE SITUATION BY SECTOR

		Those most vulnerable to layoffs:	Those who wish to leave the most:
		Food service (dining room and kitchen)	Food service (dining room and kitchen)
		Maintenance	Supervisors/managers Professional/administrative
		Dining room workers	Dining room workers Supervisors/managers
		Bus drivers	
		Travel agents Tour guides	Supervisors/managers Travel agents Tour Guides
		Food service	Guide/monitor/host Customer service Food service
			
Urban areas - Montréal in particular			

Who have we laid off and based on what criteria?



Our layoff decisions have been determined by the needs based on occupancy rate and the level and type of services we could continue to offer. Seniority was a factor, but primarily, workers' versatility and flexibility were decisive. In this context, it is difficult to maintain separate services.

Hotel representative

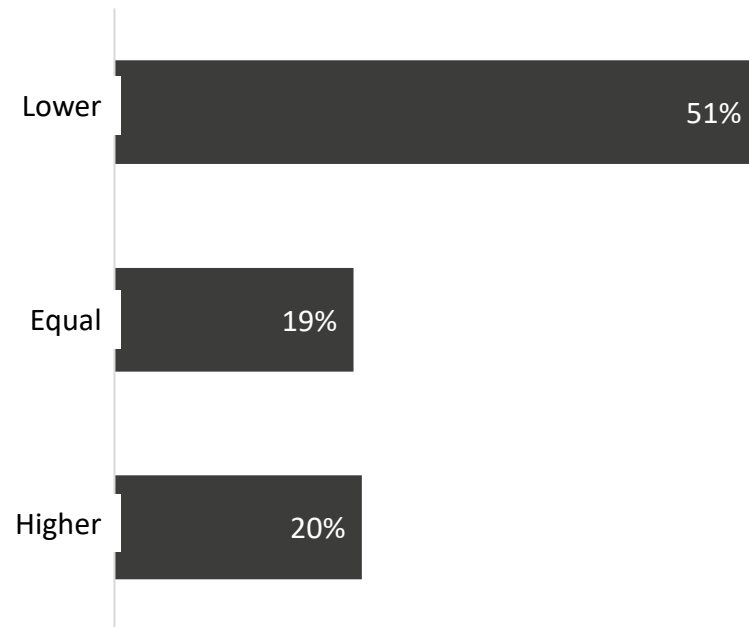
Main competing sectors

THE MAIN SECTORS WHO ARE POTENTIAL DESTINATIONS, BY OCCUPATIONAL GROUPS

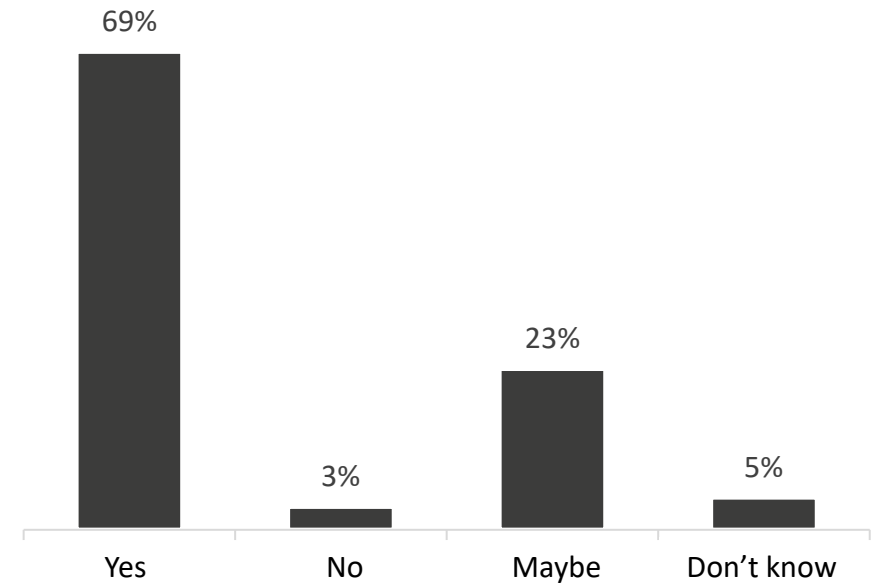
Occupational groups	Potential destination
Guide/monitor/facilitator/rescuer	Cultural
	Education
Customer service	Administrative services
	Transportation
Dining room service	Health care
	Administrative services
Kitchen	Construction
	Administrative services
Maintenance	Health care
	Administrative services
Supervisor/manager	Administrative services
	Education
Professional and administrative	Administrative services

Workers who have changed sectors

COMPARISON BETWEEN THE EARNINGS OF WORKERS WHO SWITCHED SECTORS AND WHAT THEY WOULD HAVE EARNED IN TOURISM



WOULD YOU BE WILLING TO RETURN TO WORK IN TOURISM ONCE THE CRISIS IS OVER?



To Ensure that the Workforce Shows
Up for the Recovery

WHAT SHOULD WE DO?



One of the cornerstones of the sector is the quality of its workforce. We need to ensure that we retain talents.

Our workers are passionate. They will want to come back once the crisis is over. We need to promote matches between workers and employers who have temporary needs.

We have helped many workers to reposition themselves, especially in hospitals. But others want to stop for a while and are willing to wait for services to resume.

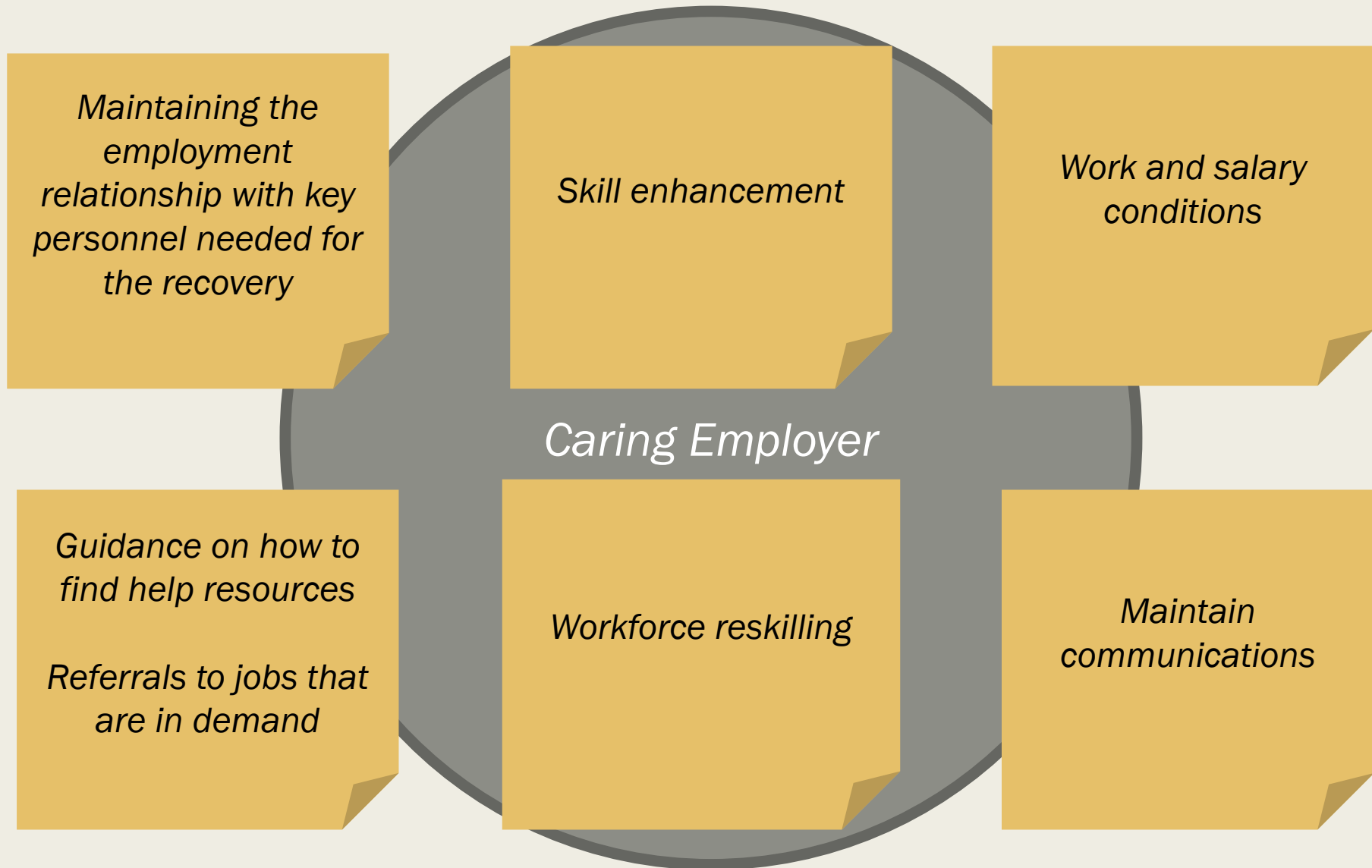
We are faced with a great dilemma: maintain the employment link or maintain false hopes.

Yes, the digital shift will bring some changes, especially at the transactional level, but fundamentally, the Québec tourism industry's success depends on its human factor.

The crisis will be long-lasting and the uncertainty that hangs over it undermines the possibilities of maintaining the employment link. Workers will have no choice but to reorient their careers.

Experienced workers in the sector, but with skills that are difficult to transfer, are among those most at risk of being left behind by the current crisis and having difficulty reorienting themselves.

Ingredients for a successful workforce recovery



Re-valorization of jobs in tourism



THREE QUESTIONS:

1. *What are the greatest sources of workforce-related risk for recovery? (e.g., occupations, issues, skills)*
2. *What would be the best way to define the key personnel (core workforce) required to prepare for recovery?*
3. *What types of initiatives or support could help bring back the laid-off workforce?
What will be our strengths?*



Find our sectoral analyses online:

Tourism

https://cqrht.qc.ca/wp-content/uploads/2020/11/Travailleurs_COVID_AnalyseCQRHT.pdf



https://cqrht.qc.ca/wp-content/uploads/2020/11/Travailleurs_COVID_Restauration_AnalyseCQRHT.pdf



https://cqrht.qc.ca/wp-content/uploads/2020/11/Travailleurs_COVID_Hotellerie_AnalyseCQRHT.pdf



https://cqrht.qc.ca/wp-content/uploads/2020/11/Travailleurs_COVID_LoisirsDivert_HebNat_AnalyseCQRHT.pdf



https://cqrht.qc.ca/wp-content/uploads/2020/11/Travailleurs_COVID_Voyage_AnalyseCQRHT.pdf