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New Brunswick Tourism Workforce Development Plan

Updated in the wake of the Covid-19 pandemic

October 2020

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Executive Summary

The industries that make up the tourism sector: accommodations, food services, recreation and entertainment, tourism-related transportation and travel services were hit hardest by Covid-19 and will be the longest to recover in the pandemic's wake.

TIANB and its partners were working hard on the New Brunswick Tourism Workforce Development Plan (2019-2024) when the pandemic hit. Many initiatives were underway, and a broad-based marketing plan had been approved by ACOA. The pandemic required TIANB to pivot and increase its support to the industry in a number of ways including the provision of Covid-19-related training, providing daily updates relevant to the industry and developing specific new courses such as the *Clean it Right* program (see Section 3.2).

This update to the Tourism Workforce Development Plan provides current information on the state of the tourism workforce in New Brunswick and how it has been impacted by the pandemic. The information was gathered through a survey of the industry, stakeholder interviews and other sources such as Statistics Canada and Tourism HR Canada. Section 4 provides an overview of tourism workforce trends across Canada and in New Brunswick. A few highlights include:

- Total tourism employment in New Brunswick was down 19% in August 2020 compared to the previous year. Prince Edward Island saw the steepest decline (-33%).
- The tourism unemployment rate in New Brunswick was 9.7% in August, below the national rate of 11%.
- The number of tourism-related job postings in New Brunswick dropped sharply after the onset of Covid-19. For the combined four-month period March to June 2020, online advertisements for restaurant jobs were down 57% in 2020 compared to 2019, accommodations jobs down 79% and arts, entertainment and recreation jobs down 75% year-over-year.
- There are new training requirements emerging as a result of Covid-19 including safety and sanitation topics, interpersonal skills (dealing with customers), new technologies, mental health and well-being and management/supervisory skills training (see Section 5).

Section 6 considers the impact of the pandemic on the various tourism workforce segments. Highlights include:

- Concerns that older workers and persons with a disability will not rejoin the tourism workforce due to health/safety considerations.
- Younger workers opting for CERB instead of working.
- Immigrants are a growing source of workers for the tourism sector and the inward flow (as well as international students) is down considerably in 2020.
- Efforts to promote tourism careers to students have been hampered – moving more of this activity online is a good option.
- The Covid-19 pandemic has curtailed efforts to engage with the indigenous workforce.
- Gig jobs have grown strongly in the pandemic – particularly in the restaurant delivery segment.
- Remote work has been used by some firms and organizations in the tourism sector but mostly for back office, marketing and other administrative work. Most of the work done by the tourism workforce cannot be done remotely.

Executive Summary (cont.)

Section 7 looks at the impact on entrepreneurs and entrepreneurship in general across the tourism industry. Boosting business skills among small business owners remains a critically important goal. In the survey of tourism firms, 34% said they were considering selling their business. Finding a new generation of tourism entrepreneurs will need to be an important focus coming out of Covid-19.

Section 8 considers the outlook for the tourism sector and workforce in New Brunswick. Most of the firms consider 2020 a write off – with only less than eight percent indicating 2020 would be about normal in terms of clients and revenues. For 2021 there is more optimism. Nearly 60% are 'cautiously optimistic and 22% expect things to be back to normal. Only 5% of respondents to the survey felt very pessimistic for 2022 and beyond.

Section 9 provides a summary of the proposed updates to the Tourism Workforce Development Plan. The implementation of the Workforce Development Plan has been impacted and the pandemic will continue to influence its implementation over the near term. Because of this, the revised plan focuses on four areas through the rest of 2020 and 2021. It will be re-evaluated later next year. The four areas of workforce development focus will be:

1. Supporting the industry's training needs arising from the Covid-19 pandemic including training for entrepreneurs on how to navigate the current challenges.
2. Promoting tourism career awareness and experiential learning for high school and post-secondary education students (e.g. advancing the MOU).
3. Promoting and encouraging uptake of the MAGNET job matching service.
4. Exploring the potential of the Gig economy and job sharing including which tools would be facilitate this approach to meeting labour demand.

Other targeted initiatives related to the development of specific segments of the workforce will be implemented in Year 3 of the plan.

Measurement:

Ongoing interaction with the industry is more important than ever - particularly in 2020 and 2021 as the industry hopefully starts to emerge out of Covid-19. TIANB will continue to survey its membership and report on results and will also report on Statistics Canada data as well as Tourism HR Canada data on the state of the industry. There will also be ongoing reporting on specific workforce development plan initiatives.

TIANB will work with its partners to develop a progress dashboard that will include:

- Statistics Canada data on tourism workforce trends
- TIANB tourism industry survey results
- Progress on specific objectives (e.g. # of high school students involved in tourism-related experiential learning)

The goal is to have this dashboard in place by early 2021.

1. Introduction

In May 2019, the Tourism Industry Association of New Brunswick (TIANB) unveiled the New Brunswick Tourism Workforce Development Plan for the period 2019 to 2024. In recent years, the tourism industry has faced increased difficulties recruiting staff. The job vacancy rate rose sharply between 2016 and 2019 and there was serious concern the shortage could ultimately impact the tourism industry's ability to grow in the future. The new tourism workforce development plan was a deliberate effort to address this challenge and ensure the industry has a good pipeline of talent for the future.

Figure 1 provides a summary of the Tourism Workforce Development Plan. The vision centred on a collaborative effort to ensure the industry has a strong pool of talent to meet labour demands in the years ahead.

There were four objectives including tourism career promotion, an increase in related education and training, stronger human resources practices among the firms and organizations in the industry and an effort to focus on specific demographic segments including Indigenous workers, the 55+ workforce, immigrants and persons with a disability.

TIANB would take responsibility for the implementation of the plan including the hiring of a coordinator and the development of specific initiatives. However, it was envisioned that other stakeholders would lead initiatives in areas aligned with their mandate such as the community colleges, economic development groups, etc.

The plan put a strong focus on measurement and accountability and proposed an annual survey of tourism industry firms/organizations, an ongoing reporting of tourism workforce statistics and reporting on specific workforce development initiatives.

1.1 Emergence of Covid-19

The unexpected Covid-19 pandemic has hit the tourism industry hard. Government felt compelled to shut out travellers initially from outside New Brunswick and, while eventually allowing travel within the Atlantic Canada 'bubble', still mostly barred tourists from the rest of Canada including critical markets for New Brunswick such as Quebec and Ontario. Further, many New Brunswickers were hesitant to participate in tourism-related activities out of ongoing concerns related to the pandemic.

In addition, government rules to restrain the spread of the virus – such as social distancing, rigorous sanitization and the use of facemasks has increased costs and reduced capacity for most tourism-related businesses in New Brunswick.

There were also considerable implications on the workforce including a fairly sharp decline in employment. A number of firms struggled to bring workers back due to government income support programs and worker concerns about the virus. All firms and organizations faced new training requirements related to virus control.

This report provides an update to the Tourism Workforce Development Plan based on the new realities. It is meant to be a roadmap to help the industry address new workforce challenges and also ensure the talent pipeline is in place as the industry rebuilds over the coming months and several years.

Figure 1: New Brunswick tourism workforce development plan: Overview

Vision:	Work collaboratively towards ensuring the industry has a strong pool of talent to meet labour demands in the years ahead.										
Objectives:	<p>#1 - Promote tourism careers Initiatives:</p> <ul style="list-style-type: none"> ⇒ Tourism jobs portal and career promotion website ⇒ Careers in Tourism awareness campaign (#NBtourismcareers) ⇒ Regional tourism job fairs around New Brunswick <p>#2 - Boost tourism education and training across New Brunswick Initiatives:</p> <ul style="list-style-type: none"> ⇒ Expanding tourism career planning in New Brunswick middle and high schools ⇒ Expand community college programming with a specific focus on international students ⇒ Leverage FutureReadyNB ⇒ Formalize entrepreneurship training and promotion within the tourism sector <p>#3 - Strengthen HR practices within the industry Initiatives:</p> <ul style="list-style-type: none"> ⇒ Promote TIANB tourism training ⇒ TIANB sharing best practices initiative <p>#4 - Target specific demographic segments</p> <table border="0"> <tr> <td>⇒ Indigenous workers</td> <td>⇒ Boosting college graduates</td> </tr> <tr> <td>⇒ 55+ workforce</td> <td>⇒ Persons collecting EI</td> </tr> <tr> <td>⇒ Immigrants</td> <td>⇒ Persons with a disability</td> </tr> <tr> <td>⇒ International high school students</td> <td>⇒ Temporary foreign workers (TFW)</td> </tr> <tr> <td>⇒ Bilingual high school students</td> <td>⇒ 'Gig' jobs in tourism</td> </tr> </table>	⇒ Indigenous workers	⇒ Boosting college graduates	⇒ 55+ workforce	⇒ Persons collecting EI	⇒ Immigrants	⇒ Persons with a disability	⇒ International high school students	⇒ Temporary foreign workers (TFW)	⇒ Bilingual high school students	⇒ 'Gig' jobs in tourism
⇒ Indigenous workers	⇒ Boosting college graduates										
⇒ 55+ workforce	⇒ Persons collecting EI										
⇒ Immigrants	⇒ Persons with a disability										
⇒ International high school students	⇒ Temporary foreign workers (TFW)										
⇒ Bilingual high school students	⇒ 'Gig' jobs in tourism										
Implementation:	<ol style="list-style-type: none"> 1. Implementation committee established by TIANB board of directors. 2. TIANB CEO has accountability for implementation. 3. Tourism Workforce Development Coordinator hired to coordinate the implementation of the plan. Reports to the TIANB CEO. 4. Core tourism workforce development plan initiatives led by TIANB with support from specific partners around the province. 5. Specific workforce segment initiatives led by a champion organization related to the segment (e.g. persons with a disability, entrepreneurship development, etc.) 										
Measurement:	<ul style="list-style-type: none"> ✓ Reporting results of an annual survey of tourism industry firms/organizations. ✓ Reporting Statistics Canada data related to the tourism sector. ✓ Reporting on specific workforce development plan initiatives. 										

2. Status of the Tourism Workforce Development Plan: Pre-Covid-19

2.1 Phase 1

The implementation of the Tourism Workforce Development Plan was split into two phases. Phase 1 had six objectives and was expected to take six months from October 2019 to March 2020. It was managed by Natacha Dugas, a former senior executive with the Department of Tourism, Culture and Heritage. The following provides a summary of the Phase 1 objectives and the actions taken.

1. Establish, monitor and support the tourism portal on the Magnet site.

The Magnet community for tourism was launched at the end of November 2019. However, the system needs some adjustments as it does not permit operators to promote job offers on social media without the job seeker creating a profile and login in. TIANB is promoting the website to employers and will continue to do so also using partners. Specific efforts need to be put forward to bring the industry toward this platform. Specific marketing efforts were added to the marketing plan. The platform also has an internal communication system with which TIANB can communicate with job seekers as well as employers. In the marketing plan, these channels are used to promote a career in tourism, or specific hiring efforts or best practices.

2. Outreach to the PETL officers (7 regions): Develop a plan for virtual and in-person job fairs in each of the regions.

Before the pandemic hit, TIANB had been calling its members in order to understand their needs for a tourism-specific job fair in their region and the possibility of a provincial virtual job fair. There are three regions that have shown an interest in developing a tourism-specific job fair including the Chaleur-Peninsula region, the Fredericton region and the southeast. Some regions already include tourism in broader job fairs.

Immigrants job fairs

TIANB is also partnering with the City of Moncton to have a job fair for newcomers and having the evening dedicated to tourism and two non-competitive sectors. In addition, TIANB went to Belgium in March (pre-pandemic) and participated in Job Day which led to more than 30 interviews with potential candidates in tourism occupations such as chef/cook, housekeeping, etc. The Covid-19 pandemic has put international recruitment efforts on hold.

3. Outreach to the middle and high schools in the province to establish an inventory of which ones have career days, co-op programs or other opportunities where speakers/representatives would talk to students.

TIANB and EEDC (FutureReady NB & FutureReady Wabanaki) signed a Memorandum of Understanding to work on integrating tourism careers into the FutureReady English and French experiential learning program. The focus will be both online and in-person. This three-year agreement will provide sufficient time to reach the 3HAG (3-year highly achievable goal) which is a broad-based effort to promote tourism careers and boost tourism education and training across the province. The text of the MOU is found in Figure 2.

Figure 2: TIANB/EEDC (FutureReady NB/FutureReady Wabanaki) Memorandum of Understanding**Purpose of the MOU**

The partnership is formed to share ideas and create collaborative projects that leverage and nurture the strengths and networks of TIANB and of EEDC to support and advance mutually beneficial goals of both partners. This partnership agreement describes how the partners will work together in collaborative activities.

Mutual Benefits of the Partnership

Participating organizations have identified the following benefits as outcomes of the partnership:

- Commitment to using a strengths-based approach and leverage what partners do well, supporting the work of one another.
- Commitment to share ideas and develop collaborative projects that add value to existing services or fill identified needs/gaps.
- Commitment to developing clear goals and metrics/agreed-upon expectations and commitment to share related data for all collaborative projects.
- A diverse and inclusive approach that allows access for all learners.
- Raise awareness of current and future career opportunities and job options in the field of Tourism to students, teachers and families.
- Experiential learning opportunities for Middle and/or High School learners.

TIANB is also looking to create a 2-day tourism-curriculum workshop for teachers in the summer. The goal is to have the teachers understand and live the tourism experience. However, since COVID-19 this initiative will be postponed. The Francophone tourism class is an online course that covers all students in the province and only requires one teacher. This project is still in discussion.

4. Outreach to post-secondary, government and industry stakeholders to discuss outreach strategies for specific demographic segments.

TIANB has established more than 40 partners around the province to help promote and publish career information targeted at post-secondary students and other demographic segments and will be establishing more in Phase 2 when the full workforce development marketing plan is implemented.

Indigenous

The coordinator of the implementation plan has worked closely with the Joint Economic Development Initiative over the past three years. First to create the first, Indigenous Tourism Startup Weekend and then to see how Tourism NB and then TIANB support Indigenous Tourism Entrepreneurs and Labour Force. JEDI has been supporting indigenous tourism entrepreneurs with their new incubator and accelerator programs. There is a new entity that is now supporting indigenous tourism in the province. Still fairly small is should grow and have more members in the coming years. Indigenous tourism has been increasing over the past few years all around Canada.

TIANB presented to the Employment & Training Officers for the indigenous communities around the province in February 2020. However, since then there has been some turnover in the Employment & Training staff. TIANB will seek to develop a more formal partnership approach with indigenous communities.

TIANB will be presenting and working closely with JEDI and with the Indigenous Association to promote the portal to employers and seeking employees. JEDI will also have its own Magnet portal.

Seniors (55+)

There has been contact with the New Brunswick Senior Citizens Federation as well as the Association francophones des aînés du NB to review the previously established partnership. The Association francophones des aînés du NB has been in favour of TIANB using their newsletter and their Facebook page to promote working in tourism. The pandemic may have reduced the interest in promoting tourism jobs.

Immigrants

TIANB sends and will continue to send articles in Population Growth's Newsletter to newcomers every quarter. Moving forward there needs to be a more consistent partnership with Population Growth to see when the next mailout will be now that things have started moving again.

TIANB is also working with the City of Moncton for an immigrant specific job fair for tourism (an evening with two other sectors). Since COVID, all the job fairs have been cancelled until further notice. However, there could be a virtual one in the near future.

Before the pandemic, TIANB met with the "Hautes écoles" in tourism in Belgium. Many are hoping to create long-lasting partnerships with post-secondary establishments in New Brunswick. Plus, TIANB has been receiving many demands for students to come and do on-the-job training here.

TIANB is also working with NB Multicultural Council to forward all of information and initiatives to the regional multicultural associations. While discussing with the government's immigration officer it was clear that the preferred way of hiring immigrants at this time is Temporary Foreign Workers already in Canada.

As mentioned previously, TIANB has created some relationships with Belgium and still has a list of qualified candidates waiting impatiently to come and work in the province.

This being said, the coordinator keeps a close relationship with Nicolas Carrière, immigration officer at GNB, as well as Louise VanWinkle, Designated Migration Officer at the Embassy of Canada to France.

International students: Work/Travel Visa

TIANB is also working closely with the Work/Travel Program in order to see if this tool can be used to fill some jobs. The organization met with the co-founder of a company that promotes the Working Holiday Visa to students around the world. However, this is under the marketing initiative, which is now on hold.

This program is specifically interesting for France and Belgium. In Belgium, it is a draw and there is a limited number of visas issued. However, there is far less demand than in France. It is perfect for students that want to come and have work experience in Canada. They can only have access to the program once, and they need to exit the country to modify their visa. Since there are no agreements between Canada and Belgium for student exchange, internship or others, this program becomes handy. TIANB will discuss marketing opportunities with pvtistes.net once the new marketing plan is in place

Bilingual high school students

TIANB will be working with EECD to see at establishing a summer exchange for students in the south to work north of the province to be immersed and vice versa. This aspect will be integrated into the MOU with the Francophone and Anglophone systems and might not only be specific to bilingual high school students.

High school students

Please see the above section: Outreach to the middle and high schools in the province to establish an inventory of which ones have career days, co-op programs or other opportunities where speakers/representatives would talk to students.

College Students

College students are one of the segments that TIANB has not had the chance to do a deep dive in. However, there have been meetings with NBCC as well as CCNB to see how TIANB can work with them and contribute to boosting graduates in the tourism sector. But the fact is that all post-secondary institutions in New Brunswick are seeing a dramatic drop in the numbers of registration in the various tourism sectors. TIANB is also keeping conversations open with the Université de Moncton as well as UNB, more precisely with UNBSJ, which has a few classes in tourism. NBCC has added the website www.tourismjobs.magnet.today to their class to help them find jobs. NBCC is also inviting employers to come and talk to students and creating experiential learning for their students by having them prepare international lunches, just like a real restaurant. They offer 5 tourism-related programs Culinary Art, Culinary Art Management, Hotel and Restaurant Management, Hotel and Restaurant Operations and International Travel and Tourism.

TIANB has also met with CCNB. They have two programs; Art culinaire and Cuisine professionnelle, both are given at the Edmundston Campus. More discussion needs to take place. CCNB has been trying to renew its tourism and hospitality programs.

TIANB has met with Oulton College and McKenzie College. McKenzie College now hosts international students who are doing one or two years of English studies before attending, in some cases, a local post-secondary institution. McKenzie has agreed to have for TIANB present to their students. However, McKenzie has just moved into a new building over the past year and is in the process of reorganization. But the owner has opened the college door to TIANB and even proposed that TIANB come and talk to other fields of study, such as IT, photography, graphic design, etc.

Oulton College is in full expansion and it has been difficult to create long-lasting relationships with them.

University Students

As mentioned above, TIANB has a great relationship with both Université de Moncton and UNBSJ.

TIANB also had met with Rob Moir, from UNBSJ. Biggest challenge; little registration and retiring staff. Moir mentioned that before they had a follow-up program with colleges and that was going well, but it has not been renewed because of low attendance.

However, they have possibly an offer on the table with ISEM - Vietnam which could be a great way to get new students and new workers. They are still offering Hospitality Tourism Management, but they have been trying to find ways to keep and renew this program.

TIANB is at the very early stages of the discussion with the Université de Moncton. The organization is looking at a « mobilité étudiante » and « mobilité professorale » program where students come and study here or somewhere else in the world. TIANB has been discussing with the Hautes écoles in

Belgium about the possibility to create such exchanges. This being said, the Université de Moncton does not have specific programs in tourism but do offer some classes as a part of the administration program. TIANB is now trying to see if there would be a champion that could run with this at UdeM. The Hautes écoles are very interested to deal with schools outside the province of Quebec but still French speaking.

Persons with a disability

TIANB has a series of four interviews demystifying hiring a person with a disability and the support offered to employers. The first interview, *Mobility Disability an Untapped Labour Force*, was released in February. However, the rest of the series was not published due to COVID. But TIANB will republish and restart the initiative as soon as the industry is ready. TIANB has a great relationship with Ability New Brunswick Inc. as well as the Canadian Council on Rehabilitation and Work. Ability New Brunswick was also looking at having its own community on Magnet.

Temporary Foreign Workers

No specific initiatives were put forward in regard to Temporary Foreign Workers. As mentioned previously, New Brunswick has been focused on bringing TFW from the rest of Canada in the immediate situation.

People collecting EI

No specific initiatives were put forward for people collecting EI.

Gig job in tourism

TIANB is not convinced employers wish to be using gigs at this time. However, the organization will be surveying the industry within the next few months to see how this idea could fit into the plan.

5. Deliver a 3-year tourism workforce marketing plan.

A 3-year tourism workforce marketing plan was developed and submitted to ACOA and GNB. The plan includes a wide variety of actions meant to address the objectives in the plan. This includes public relations, marketing, events and influencer engagement to raise awareness of tourism careers in New Brunswick. The focus will be on targeted the various demographic segments outlined in the plan. The marketing plan also has a regional focus to ensure specific needs are addressed.

6. Assess deliverables and prepare a plan for the second and third years of the implementation plan.

TIANB is working with the steering committee to secure three-year funding to move forward on the implementation of the updated workforce development plan.

2.2 Phase 2: Implementation of the three-year marketing plan

The Phase 1 process described above was meant to set the table for a three-year marketing plan. The Covid-19 pandemic led to the need for a reassessment of priorities and the development of this updated tourism workforce development plan. TIANB is working with the steering committee to funding to implement the marketing plan.

3. The tourism workforce: Covid-19 response

3.1 Canada

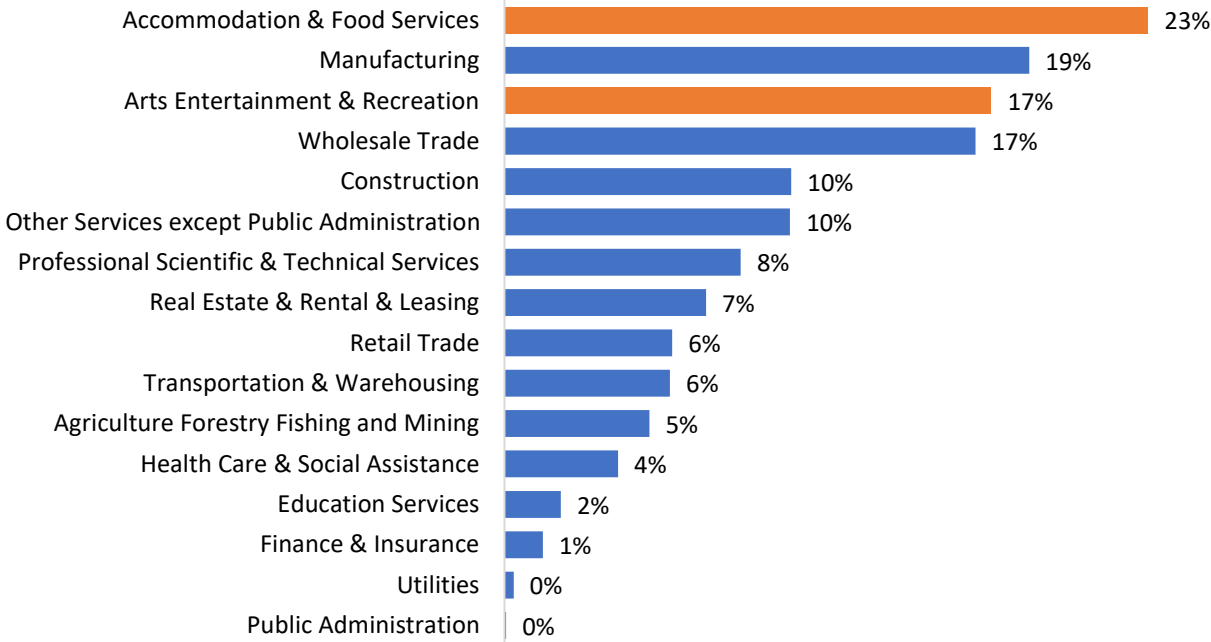
The tourism industry has been hardest hit by Covid-19. In August 2020, employment in the accommodation sector was down 31% over the same month last year. Travel services employment was down 35%. Tourism-related transportation employment down was 26%. The tourism industry will also be the last to recover.

This is why, in general, firms in the tourism industry have benefitted from government support programs at a rate higher than most other industries. As an example, in the first month the Canada Emergency Wage Subsidy (CEWS) was available a total of 428,500 employees in the accommodation and food services sector were covered under the program or an amount equivalent to 47% of the total workforce in that sector. The next closest was wholesale trade (35% of the total).

By the June 7 to July 4 timeframe, the number of CEWS-covered employees had dropped to 271,370 or an amount equivalent to 23% of the total workforce in accommodation and food services. This was the highest share of any main industry group during the timeframe. Between March and July, a total of \$1.7 billion has been dispersed through the CEWS to firms in the accommodation and food services sector.

The other broad sector significantly exposed to tourism is the Arts Entertainment & Recreation sector. In the June 7 to July 4 timeframe approximately 54,000 employees were CEWS-covered in this sector or an amount equivalent to 17% of all workers in the labour force. A total of \$464 million has been dispersed to firms and organizations in this sector since the programs inception in March.

Figure 2: CEWS covered employees relative to the size of the total labour market, by selected industry (for the period covering June 7 to July 4)



Sources: Government of Canada and Statistics Canada Table: 14-10-0022-01.

Industry-specific data is not available at the provincial level but New Brunswick's overall usage of the CEWS program is covered in Section 3.2 below.

Other financial programs accessed by the tourism industry during the Covid-19 pandemic include the Canadian Emergency Bank Account (CEBA), Canadian Emergency Relief Benefit (CERB) and the Canadian Emergency Commercial Rental Assistance (CECRA) program. Further, some firms have accessed the Student Employment Grant (Canada Summer Jobs or Student Volunteer Program) to help address the drop in operating revenue during the pandemic.

Beyond government financial support, there have been other efforts to support the tourism industry workforce nationally. Tourism HR Canada positioned itself early on to take the lead on national workforce recovery strategies. The organization put together a comprehensive online recovery toolkit and resource for tourism businesses.

Tourism HR Canada has also issued a list of ten recommendations for government and the industry to help the tourism sector rebound by ensuring it has a post-COVID-ready workforce. The following are a summary of these recommendations.

1. Practical, explicit guidelines: Refer industry to authoritative resources that are maintained, many of which are sector specific. Work with government and health authorities to inform, design, and implement further guidelines that will work for tourism operators.
2. Flexible, back-to-work employment insurance scheme: Work with government to look at employment insurance programs or policies that will be responsive to the unique issues facing tourism, especially because of the gradual recovery period.
3. Skills training focused on new service and workplace requirements: Promote newly created Tourism Workforce Recovery Toolkit and seek additional resources to expand on the products and services (resources) offered in response to emergent needs. Continue to offer and promote the comprehensive list of Emerit online training courses at no cost.
4. Overhauled workforce plans: a post-COVID people strategy: Provide tools and support to help employers develop post-COVID workforce strategies. Monitor anticipated changes to labour codes and other regulations that impact workforce practices and inform the sector of these changes.
5. Community labour force development plans and a pan-Canadian tourism labour market strategy: Develop and implement a framework for community labour force development planning. Work with the federal and provincial governments, national associations, and other key stakeholders to develop a comprehensive tourism sector labour force strategy that complements the Government of Canada's (i.e., Destination Canada) tourism marketing and growth strategy.
6. Tourism job retention and job growth strategy: marketing tourism as a destination for employment: Seek government support to revive Discover Tourism as a key vehicle to drive a tourism job retention and job growth strategy. Equip Tourism HR Canada, national tourism associations, provincial and territorial industry associations, and Destination Canada with a common campaign to promote viable careers in tourism while reinforcing messages on safe travel and good service standards.

7. Newly aligned business and service strategies: Provide tools and support to help employers develop new business models and learn to access resources or other supports to refit their operations. Work with governments to seek programs and policies that take into consideration the unique business recovery issues faced by tourism operators.
8. Tailored strategies for targeted populations: Develop workforce strategies that will help increase labour force participation of under-represented groups, i.e., Indigenous peoples, new Canadians, international students. Work with colleges and universities to augment or support needs of the future tourism workforce, by offering access to Emerit online learning and joint credentials and promoting these graduates as job ready for quick deployment to the sector.
9. Labour market data to inform policy and program decisions: Tourism HR Canada continues to study the impacts of COVID-19 on the tourism workforce and disseminate timely, comprehensive information and analysis to help inform policy and program decisions. Tourism HR Canada seeks the renewed agreement with the Government of Canada, with broad support from tourism stakeholders, for the continuation of the Foundational Tourism Labour Market Research mandate.
10. Credential passport: improving on worker and learner mobility: Invest in future proofing the tourism workforce by introducing a universal competency credential, which builds on the Future Skills Framework and fosters an inclusive, more resilient and mobile workforce that can quickly adjust to new workforce demands.

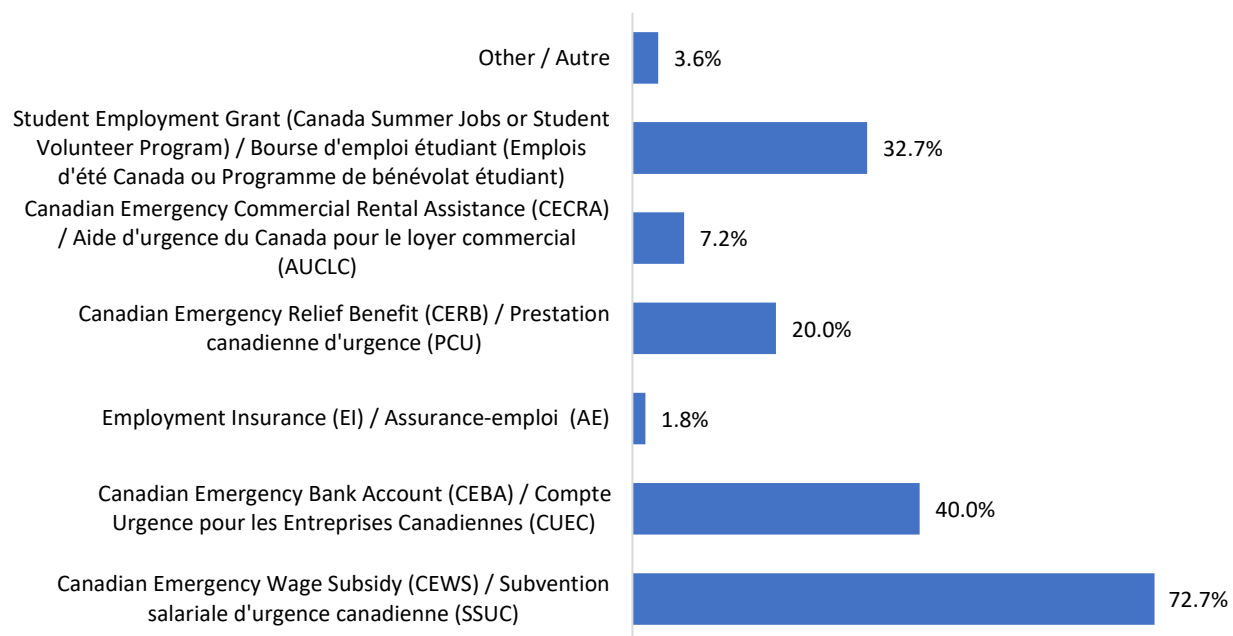
3.2 New Brunswick

New Brunswick firms and organizations have benefitted from the federal government's wage support and other programs during the Covid-19 pandemic. The Canada Emergency Wage Subsidy (CEWS) program has flowed over \$332 million to New Brunswick firms and organizations over the March to July period. Still, New Brunswick has been less reliant on the program than most other provinces during the pandemic as measured by the number of employees covered by the CEWS program.

In March, New Brunswick had the second lowest share of total workers covered by the CEWS program (43,500 workers or an amount equivalent to 12.2% of the workforce). By July 25,900 workers were still covered under this program or an amount equivalent to 6.5% of the total workforce. The relatively larger share of public employees in New Brunswick coupled with the earlier lifting of lockdown measures are likely responsible for the lower usage of the program.

In a survey conducted to support the development of the updated tourism workforce plan, 54 of 77 firms responding indicated they received funding under various government programs. The top accessed program was the Canadian Emergency Wage Subsidy (CEWS) (73% of the 54 firms) followed by the Canadian Emergency Bank Account (CEBA) (40%) and the Student Employment Grant (Canada Summer Jobs or Student Volunteer Program) (33%).

Figure 3: Government programs accessed in the wake of Covid-19 (% of total)



N=55.

In addition to financial support programs, tourism firms and organizations have other support services available. For example, TIANB has actively supported tourism operators and members during the Covid-19 crisis by providing information and services including:

- Offering free membership to the entire tourism industry.
- Daily communications to keep industry informed of all activities and updates related to Covid-19.
- Set up Covid-19 webpage with links to a wide variety of other sources including federal and provincial information.
- COVID-19 Business Continuity & Reopening Checklists.
- Pre-arrival Guest Communication and Consent Template.
- Surveys - Impact of COVID-19 on the tourism industry of New Brunswick.
- Video Interviews with the industry TIANB has started conducting interviews with the operators in New Brunswick to understand the concerns but also the hope and the successes and innovations.
- Free TIANB and EMERIT training during shut down to prepare employees to return to work.
- Developed and provided free a cleanliness certification online course in both languages (Clean it right / Nettoyez-le bien) for all New Brunswick Businesses to help industry with cleaning information such as the difference between cleaning and disinfecting.
- Partnered with 3 Atlantic provinces on a Tourism Strong website to provide Covid-19 info and links.

4. State of the tourism workforce as of August 2020

4.1 Canada-wide

The tourism industry workforce¹ in Canada continues to be significantly impacted by the Covid-19 pandemic. As an example, tourism-related firms² were receiving Canada Emergency Wage Subsidy (CEWS) support for more than 325,000 employs in July 2020. Despite this significant support which allows firms to keep employees, the unemployment rate in tourism was 17.1%. This was down from 18.7% in July. The travel services sub-sector has an unemployment rate of nearly 22%.

According to Tourism HR Canada, employment in tourism was down 21.2% in August from the same month a year ago, although it is an improvement over July, when tourism employment was down 25.0% from the same month a year earlier. By industry group, year-over-year employment losses in June ranged from -35.0% in travel services to -16.5% in food and beverage services.

Table 1: Unemployment rate by tourism industry sub-sector, Canada

	<u>August 2019</u>	<u>July 2020</u>	<u>August 2020</u>
Tourism	4.9%	18.7%	17.1%
Accommodations	5.1%	25.7%	21.3%
Food & Beverage Services	5.3%	17.0%	16.2%
Recreation & Entertainment	4.6%	20.6%	18.1%
Transportation	5.3%	14.6%	15.0%
Travel Services	N/A	27.2%	21.7%

Source: Tourism HR Canada.

Some of this weak activity is due to province-specific Covid-19 containment measures as well as border controls over national and international travel. Further, some Canadians are spending less on tourism in 2020 than the otherwise would and that is dragging down the industry and, ultimately, tourism employment.

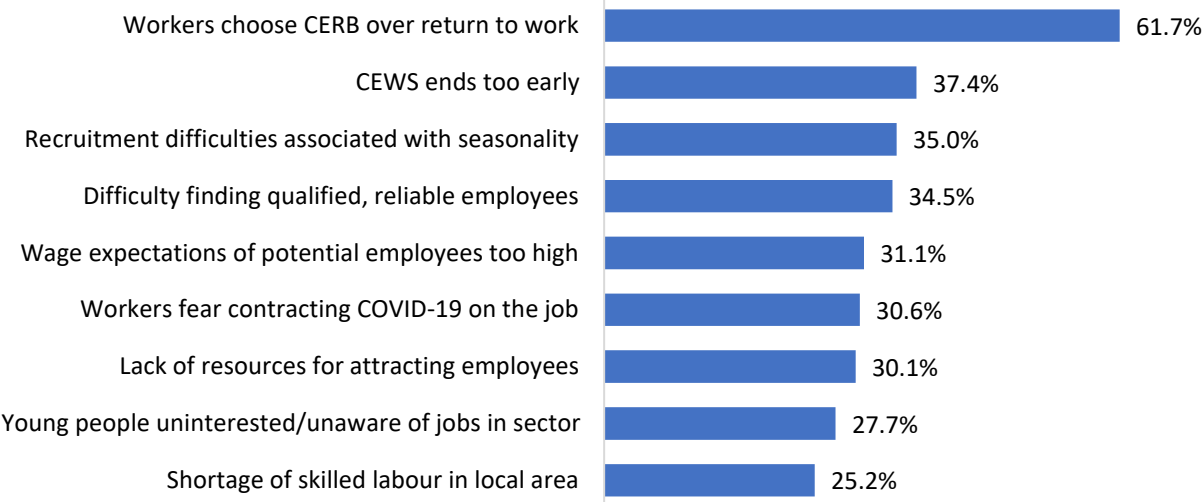
Tourism HR Canada completed a national survey of tourism firms to assess their human resources challenges in the wake of Covid-19. The top two challenges related to recruiting workers this year are that workers choosing the CERB benefit over returning to work and that the CEWS payroll support program will end too early. Nearly two-thirds of firms were concerned the CERB was a disincentive to going back to work. The only other challenge directly related to Covid-19 was a concern that some workers would not want to work due to a fear of contracting the virus (31% of firms had this concern).

¹ As defined by the Canadian Tourism Satellite Account. The NAICS industries included in the tourism sector are those that would cease to exist or operate at a significantly reduced level of activity as a direct result of an absence of tourism.

² Firms active in NAICS 71 and 72.

The other concerns are more longstanding including the seasonality of work, wage expectations, a general shortage of skilled labour, etc. In this survey, the firms were not as concerned about the reduction in immigrants and temporary foreign workers (TFWs) into Canada as a result of Covid-19.

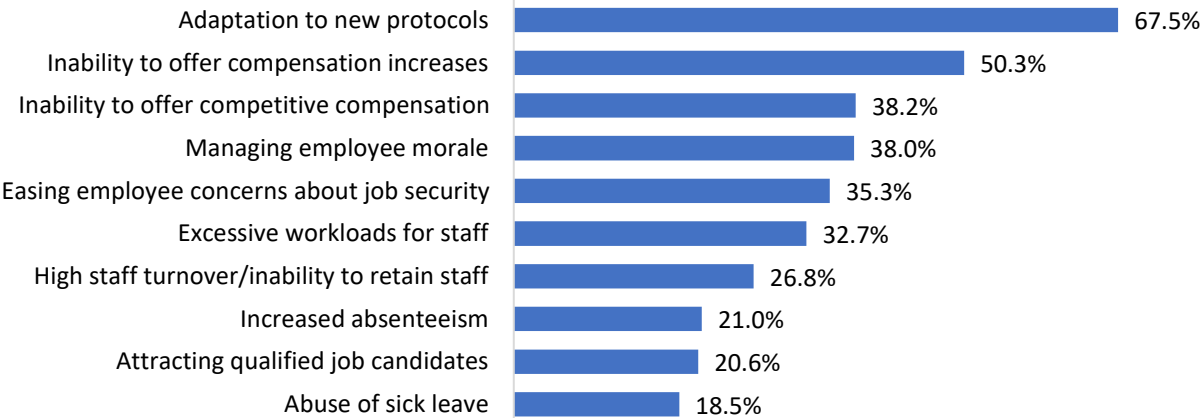
Figure 4: Top barriers to finding workers in summer 2020



Source: Tourism HR Canada.

The survey also asked about ongoing human resources concerns in the wake of Covid-19. A number of the challenges were directly related to the pandemic including the top concern, adapting to new protocols (nearly 68% of firms listed this as a challenge), managing employee morale (38%) and employee concerns about job security (35%). Abuse of sick leave in the wake of Covid-19 was a lesser concern but still mentioned by nearly one out of five firms. The rest of the ongoing human resources concerns were more longstanding such as the challenge of competitive compensation, high levels of staff turnover and attracting qualified job candidates.

Figure 5: Top challenges to managing staff in summer 2020



Source: Tourism HR Canada.

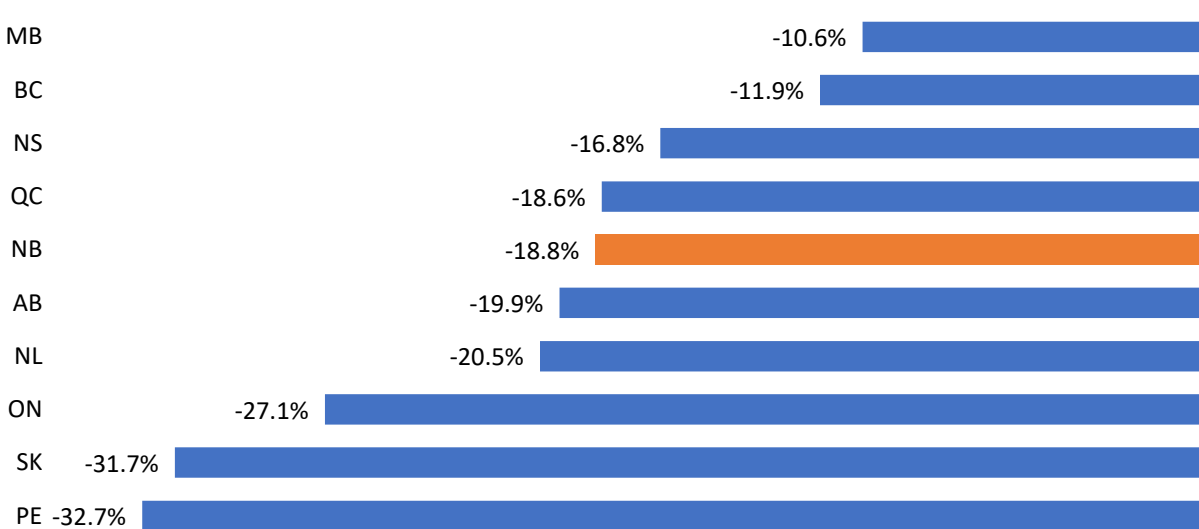
4.2 New Brunswick

New Brunswick was early out of the gate easing restrictions on the accommodation and food services sector as well as other tourism-related sectors. Further, the province joined the other three Atlantic Provinces in a 'bubble' meant to encourage travel between the four provinces.

In addition, New Brunswick is not as dependent on out-of-province travellers as either of the other three Atlantic Provinces, particularly Prince Edward Island and Newfoundland and Labrador. New Brunswick has a tourism trade deficit meaning New Brunswickers spend more out of the province each year on tourism than out-of-province visitors spend in the province each year. Prince Edward Island and Newfoundland and Labrador have significant tourism trade surpluses meaning out-of-province visitors spend far more in those provinces each year than provincial residents spend in other jurisdictions.

This has resulted in the tourism sector workforce being hit not quite as hard in New Brunswick. Still, total tourism employment in New Brunswick in August 2020 was 29,800 down from 36,700 in August 2019, a nearly 19% decline. Prince Edward Island has witnessed the steepest decline at 32.7% down compared to last year.

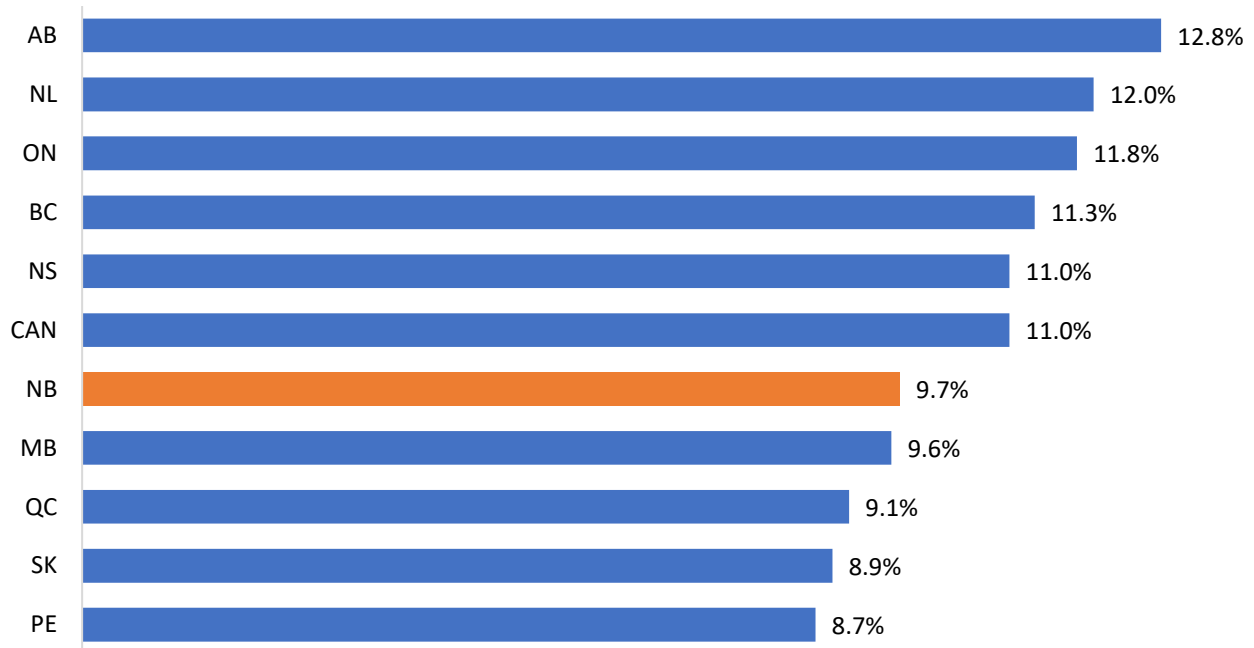
Figure 6: Percentage change in tourism employment August 2020 versus August 2019



Source: Tourism HR Canada.

The unemployment rate in New Brunswick's tourism sector in August 2020 was 9.7%, below the national unemployment rate of 11%. This means on a seasonally adjusted basis there were an estimated 3,200 tourism workers unemployed across New Brunswick during the month. Relative to the province's peers this is not too bad. However, compared to August of 2019, this represents a significant increase. Last year in August, the tourism unemployment rate was only 3.1% meaning there were only an estimated 1,100 persons in the tourism industry who were unemployed during the month.

Figure 7: Tourism industry unemployment rate, August 2020



Source: Tourism HR Canada.

Recruiting for workers

An important indicator of the rebound of the tourism workforce can be measured by how many firms are actively recruiting for staff. Based on the survey done for this report, less than one in four tourism firms and organizations were actively recruiting for staff in August. Even those recruiting were mostly using word of mouth and social media. Only 12 of the 77 firms were recruiting staff using job recruitment websites.

A broad-based review of online job postings for tourism sectors and occupations confirms a weak recruiting environment through June 2020 (the latest month for which data is available). As shown in Table 2, while the number of unique job postings in the restaurants/food services sector increased in May and June, it was still way off the number of postings last year. Accommodation services has seen an even steeper decline. In June 2019 there were 99 unique job postings for this sector and in June 2020 the number had declined to 24. The arts, entertainment and recreation sector also witnessed steep declines year-over-year.

Table 2: Job postings by selected industry and month, New Brunswick

2020	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>Totals</u>
Restaurants/food services	55	31	139	118	343
Accommodation services	36	14	14	24	88
Arts, entertainment and recreation	19	0	4	13	36
2019					
Restaurants/food services	207	203	206	181	797
Accommodation services	127	113	89	99	428
Arts, entertainment and recreation	46	32	38	28	144
% Change					
Restaurants/food services	-73%	-85%	-33%	-35%	-57%
Accommodation services	-72%	-88%	-84%	-76%	-79%
Arts, entertainment and recreation	-59%	-100%	-89%	-54%	-75%

Source: Vicinity Jobs.

On a regional basis within New Brunswick, the Moncton-Richibucto area has seen the steepest overall declines in job postings year-over-year. The number of jobs in accommodation services were down from 161 in March-June of last year to only 11 this year over the same four-month period. The number of job postings in the restaurants/food services sector were down 70% over the same timeframe in Moncton-Richibucto (Table 3).

All five regions saw steep declines in the March-June period this year compared to last. Least bad was the Saint John-St. Stephen region but this is partly because of a lower base of job postings. In March-June 2020 both the Fredericton and Moncton regions still had considerably more job postings in restaurants/food services compared to Saint John.

Table 3: Job postings by selected industry and region, March-June 2019 vs. 2020

<u>Region:</u>	<u>Accommodation services</u>			<u>Restaurants/food services</u>		
	<u>March-June</u> <u>2019</u>	<u>March-June</u> <u>2020</u>	<u>% Change</u>	<u>March-June</u> <u>2019</u>	<u>March-June</u> <u>2020</u>	<u>% Change</u>
Campbellton-Miramichi	25	4	-84%	62	32	-48%
Edmundston-Woodstock	9	4	-56%	78	26	-67%
Fredericton-Oromocto	98	9	-91%	202	122	-40%
Moncton-Richibucto	162	11	-93%	275	83	-70%
Saint John-St. Stephen	122	51	-58%	157	59	-62%

Source: Vicinity Jobs.

On an occupational basis, there have been steep declines across the board. There were 648 unique job postings for chefs and cooks in March-June 2019 across New Brunswick. During the same time frame in 2020 the number dropped to 246. Food counter attendants, kitchen helpers and related occupations had 281 job postings last year and only 62 during the same period this year.

Table 4: Job postings by selected occupation and month, New Brunswick

	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>Totals</u>
<i>2020</i>					
632 Chefs and cooks	70	36	54	86	246
651 Occupations in food and beverage service	27	2	10	22	61
652 Occupations in travel and accommodation	20	3	4	16	43
671 Food counter attendants, kitchen helpers and related	15	4	25	18	62
063 Managers in food service and accommodation	8	10	1	12	31
<i>2019</i>					
632 Chefs and cooks	131	176	184	157	648
651 Occupations in food and beverage service	42	67	55	51	215
652 Occupations in travel and accommodation	42	44	42	30	158
671 Food counter attendants, kitchen helpers and related	80	67	63	71	281
063 Managers in food service and accommodation	23	17	16	13	69
<i>% Change</i>					
632 Chefs and cooks	-47%	-80%	-71%	-45%	-62%
651 Occupations in food and beverage service	-36%	-97%	-82%	-57%	-72%
652 Occupations in travel and accommodation	-52%	-93%	-90%	-47%	-73%
671 Food counter attendants, kitchen helpers and related	-81%	-94%	-60%	-75%	-78%
063 Managers in food service and accommodation	-65%	-41%	-94%	-8%	-55%

Source: Vicinity Jobs.

5. New training and skills requirements in the wake of Covid-19

One of the objectives of New Brunswick Tourism Workforce Development Plan was the strengthening of human resources and training within firms across the province. The Covid-19 pandemic has broadened the areas where specific training will be required. TIANB, Tourism HR Canada and others are bolstering the access to online training in these areas.

Some of the new training themes include:

- Safety and sanitation: Ensuring that workers understand the why and what associated with new protocols within businesses to limit the spread of the virus.
- Interpersonal skills: Tourism is about experiences. Covid-19 brings uncertainty but also new constraints – face masks, line ups, physical distancing rules, etc. The tourism businesses best positioned to succeed will be those that can put customer at ease and still provide a valuable experience.
- Technologies: Track and trace systems, new customer interaction systems, etc.
- Mental health and wellbeing: Employees face increased stress as a result of the pandemic.
- Management/supervisory training: Specific training to support those in management and supervisory role related to interacting with staff and customers, deploying technology, sanitation, etc.

6. Impacts of Covid-19 on recruitment by workforce segment

The original Tourism Workforce Development Plan put a focus on targeting specific segments of the potential workforce for the tourism industry. The Phase 1 plan had already begun to develop plans and relationships to engage with these potential audiences. What has changed as a result of Covid-19? Each demographic group will need to be treated differently in the wake of the pandemic. Depending on how long the uncertainty lasts and how long it takes the industry can rebuild its markets, there could be structural changes in how to target specific demographic segments.

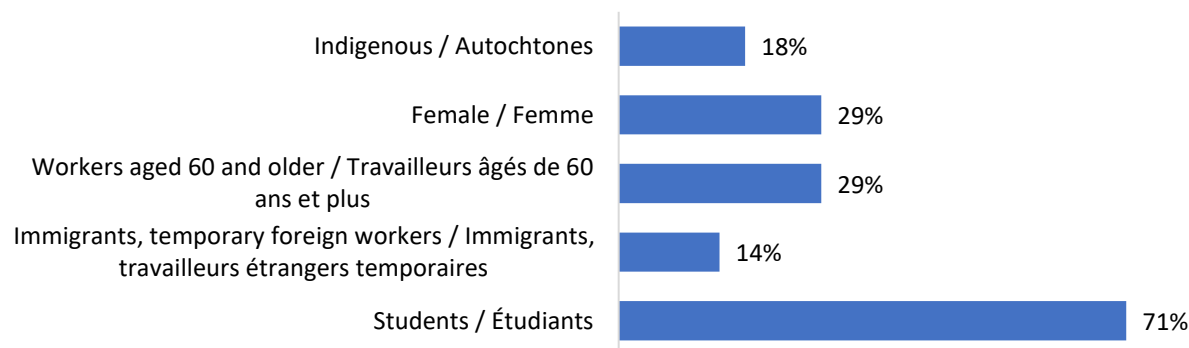
6.1 Will some people not come back?

In the survey completed for this report, most firms indicated they were not having significant challenges bringing back workers from previous years. Only 14% (or 9 firms) indicated it was significant challenge to bring back staff this year. However, over 40% (26) said there were some challenges such as employees being worried about the virus and only 35% (22) said there was no problem at all as staff were eager to get back to work.

When asked about recruiting new staff, most firms either were not having much of a challenge or were not doing any new recruiting. Only 28 firms/organizations (36% of the total) said they were having difficulties recruiting new staff and by far the biggest challenge for this group of firms was the recruitment of student employees. Twenty of the 28 firms/organizations (71%) indicated they were having difficulties recruiting students. Older workers and females were mentioned by eight firms each (29% of the 28 firms indicating difficulties recruiting new staff). Only a handful of firms indicated they were having difficulties recruiting indigenous or immigrant workers.

When asked why the firms were having such a challenge recruiting student workers, the top response was the direct financial support program offered by the federal government to the students.

Figure 8: Difficulties recruiting by workforce segment (% of total)



N=28.

There are other reasons why some workers may not come back to work in the industry, at least until there is a widely used vaccine. Older workers may feel more vulnerable and those with pre-existing conditions may not feel safe in an environment where there is substantial interaction with other people.

6.2 Implications for specific demographic segments

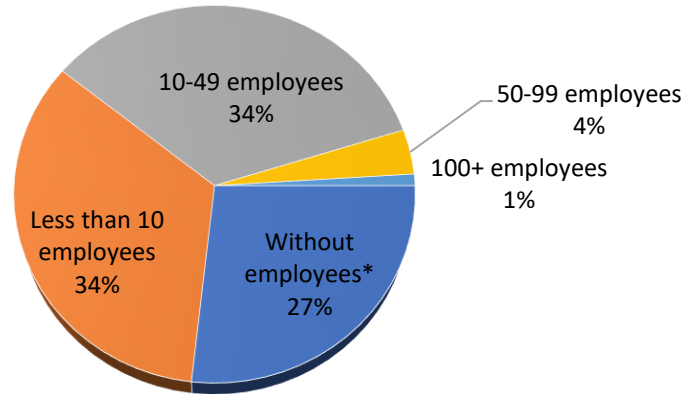
Target:	Implications:
55+ workforce	<p>The 55+ workforce (or those who have retired and are looking for part time or seasonal work) was a primary target in the original workforce development plan. New Brunswick has a much lower employment rate among this cohort and many older workers are looking for supplementary income but do not want to work a year-round, full time job.</p> <p>Covid-19 makes this segment harder to target as they are at higher risk of complications from catching the virus. Many may still consider the industry but will need assurances. Some may be better suited to available remote working jobs.</p> <p>There is still a need to cultivate this segment of the workforce because after a successful vaccine is widespread, the risk will be mostly eliminated.</p>
Immigrants	<p>Immigrants are a growing segment of the tourism industry workforce. Although Statistics Canada does not publish data on immigrants and the workforce, other sources including industry surveys reveal an increasing importance. During the development of the Tourism Workforce Development Plan, one hotel manager interviewed indicated there were 13 different countries represented in their workforce.</p> <p>Immigration, Refugees and Citizenship Canada (IRCC) publishes data on permanent residents settling in New Brunswick by occupational group. In 2019, three tourism-related occupations were in the top 10 including: food service supervisors, cooks and restaurant and food service managers. This does not include those coming in through the provincial nominee program.</p> <p>As a result of Covid-19, immigration (and international students) has been substantially curtailed. Across the province, the number of new permanent residents arriving has been cut by more than half. The number of international students has also dwindled.</p>
International high school students (or travelling recent grads)	<p>As discussed in Section 2, TIANB was already in the process of working to attract international students who are looking for summer jobs in tourism to pay for their travel in Canada. This initiative has been put on hold due to Covid-19.</p>
Bilingual high school students	<p>The pandemic makes it more challenging to reach out and engage with this demographic and with influencers (teachers, parents, etc.). For example, the initiative to encourage French Immersion high school students to live and work in the summer in a Francophone community in Northern New Brunswick will not be able to move forward until some point in the future.</p>

Target:	Implications:
College graduates	New Brunswick’s colleges have seen a steep decline in enrolment in tourism-related programs in the wake of Covid-19. Before the pandemic, 75% of students in the NBCC Hospitality and Tourism programs were international students and that source has dried up in 2020 and is uncertain in 2021 and beyond.
Persons collecting EI	The pandemic has resulted in more people using the Employment Insurance system.
Persons with a disability	The Covid-19 pandemic has curtailed efforts to engage with this potential demographic. In addition to more complicated logistics related to engaging the workforce, for some the pandemic means an elevated risk.
Temporary foreign workers (TFW)	The same challenge as related to the overall flow of immigrants into Canada. The government has made allowances for workers in strategically important industries such as agriculture and fish processing, but it is unlikely in the short term this source of workers represents an opportunity to plug seasonal gaps in the tourism workforce.
Indigenous workers	The Covid-19 pandemic has curtailed efforts to engage with this potential demographic.
'Gig' jobs in tourism	<p>The Covid-19 pandemic has led to a rise in 'gig' employment in New Brunswick and across Canada – mostly related to the transportation sector (home delivery) but also in other sectors such as IT and other services.</p> <p>This remains a longer-term potential market for firms and organizations looking for workers for specific short periods of work.</p>

7. Impacts on entrepreneurship in the tourism industry

Entrepreneurs are a vital source of labour for the tourism industry as a large share of the businesses are locally owned and operated. Further, most of them are small. As shown in Figure 9, 61% of all tourism businesses have fewer than 10 employees and 95% have under 50 employees. Many of them are under considerable strain. Moving forward TIANB and its partners need to ensure these small business owners are accessing the training they need to navigate the new tourism reality in New Brunswick.

Figure 9: Tourism businesses by employment level, New Brunswick (% of total)



Includes amusement and recreation industries, traveller accommodations and restaurants. There were over 2,500 businesses in these industries in June 2020.

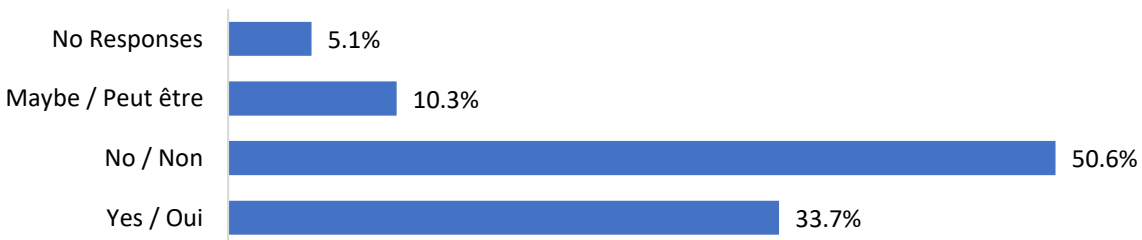
*Must have at least \$30,000 in annual revenue.

Source: Statistics Canada business counts, June 2020.

In addition, as identified in the original workforce development plan, there will need to be an increased focus on the attraction of new entrepreneurs into the industry to replace those who are planning to retire in the coming years.

The Covid-19 pandemic brings the issue of entrepreneurship even more to the forefront. In the survey completed for this report, one in three of the firms/organizations indicated they are considering selling the business and another 10.3% indicated 'maybe'. This means that nearly half of the firms responding to the survey are or might consider selling their business in the wake of Covid-19.

Figure 10: Share of firms considered selling their business (% of total)



N=77.

8. The outlook for the tourism workforce

There is no way to know for sure when (and if) the tourism industry and its workforce needs will rebound to the pre-pandemic level. In the survey of tourism firms/organizations, only less than eight percent of firms reported that 2020 was expected to be about normal (some kind of normal).

Optimism for the 2021 season is higher as 22% expect to be back to some kind of normal and nearly 60% are cautiously optimistic. Only 13% (or 10 firms) are very pessimistic about next year. Beyond 2021, the outlook is even stronger with nearly half of firms/organizations expecting a full rebound and another 41.5% are cautiously optimistic. Only 3.8% (or 3 out of 77 firms) are very pessimistic beyond 2021.

Figure 11: Optimism level about 2021 (% of total)

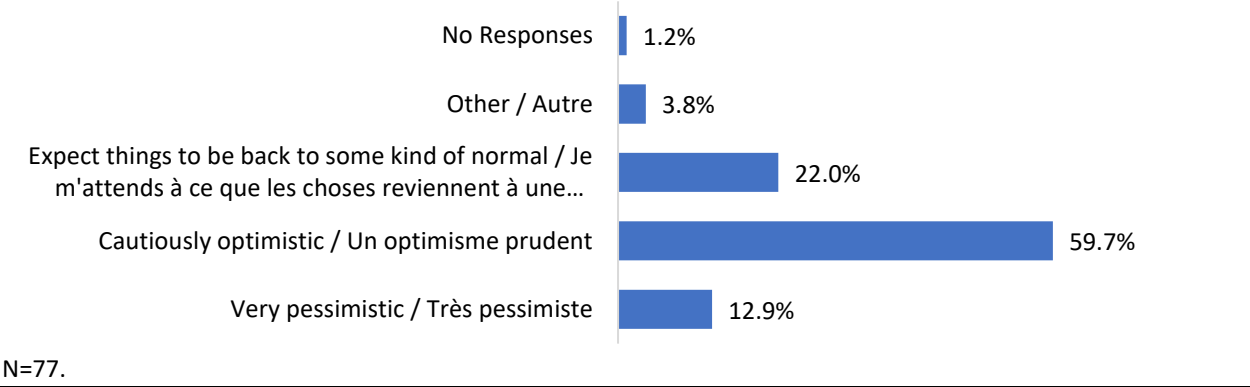
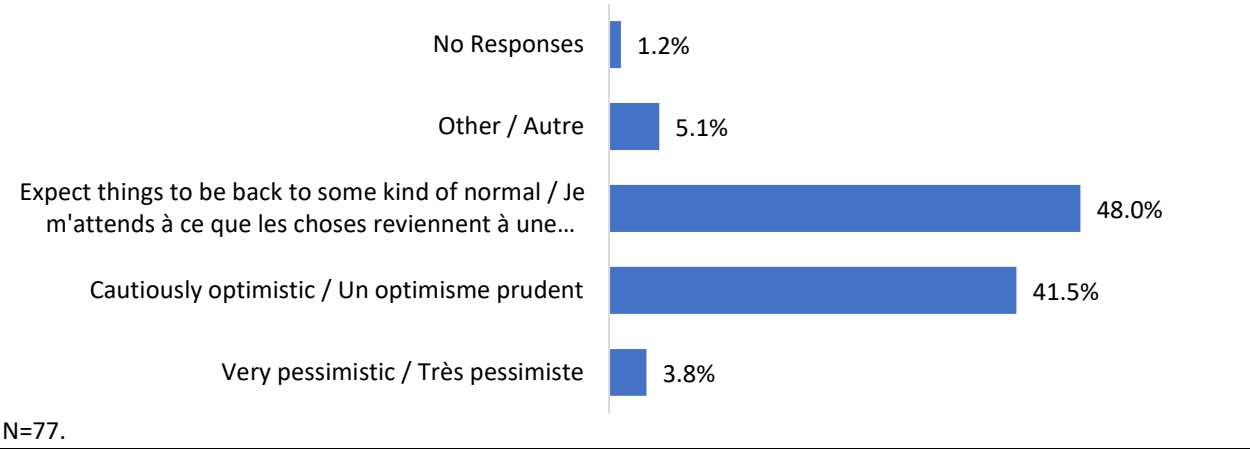


Figure 12: Optimism level about 2022 and beyond (% of total)



9.

10. The updated New Brunswick Tourism Workforce Development Plan

The Tourism Workforce Development Plan outlined the vision and put forward a series of high-level objectives that would help the industry work towards the vision. Each objective had specific initiatives meant to ensure the objective could be achieved. In the fall of 2019 and early 2020, a more detailed three-year workforce development marketing plan was developed that included a targeted approach to engaging each of the demographic segments. This new marketing plan will be adjusted to accommodate the changes to the workforce development plan.

The workforce right now is not the top concern for most companies and organizations in the tourism industry. The primary concern is ensuring survival over the next 6 months, 12 months and beyond. They are more concerned about how long government support programs will last; can they develop new markets in a very short window; can they diversify products/services into new revenue streams; and can they reduce costs to ensure at least breakeven until the tourism market rebounds.

Having said this the workforce remains a critical component of business success. The training of workers so they can continue to offer a high-quality product or service in a safe environment must be front and centre for firms and organizations. The ability to attract workers as needed is still a top priority and, importantly, having a longer-term view to ensure the underlying challenges articulated in the first Tourism Workforce Development Plan can be addressed moving forward.

9.1 Reprioritizing the objectives and initiatives

Objective:	Repositioned:
<p>Objective #3 - Strengthen HR practices within the industry</p> <p>Initiatives:</p> <ul style="list-style-type: none">• Promote TIANB tourism training• TIANB sharing best practices initiative	<p>This objective should be the top priority in the short term. Almost all firms are dealing with new training requirements related to Covid-19 including training on safety and sanitation, interpersonal skills, new technologies, mental health and wellbeing and management/supervisory training. Further many firms are having to change HR policies to reflect the new realities.</p> <p>Thirty-one firms (40%) indicated they expected to continue using remote workers for these and other related functions into the future. There should be training on how to manage a remote workforce.</p> <p>TIANB and its partners should be clear about the training needs and support the industry over the next 6-12 months and beyond.</p>

Objective:	Repositioned:
<p>Objective #1 - Promote tourism careers Initiatives:</p> <ul style="list-style-type: none"> • Tourism jobs portal and career promotion website • Careers in Tourism awareness campaign • Regional tourism job fairs around New Brunswick 	<p>This remains a high priority and should be pursued in 2021 and beyond. The bottom line is that the industry overall will not need as many workers as expected in the short term and there are over 3,000 unemployed workers with a tourism background (they are unemployed out of a tourism-related job). Overall, employment was down about 7,000 in August 2020 compared to August 2019.</p> <p>However, much of the underlying workforce dynamics articulated in the original plan have not changed. There are fewer young people interested in tourism careers. There are fewer older people looking for a second income or part time/seasonal work. Increasingly, people have alternatives and, in some cases, higher wage alternatives.</p> <p>Much of the effort could be facilitated in an online format.</p> <p>Virtual job fairs and efforts to expose young people and older workers should continue in 2021. While the number of job postings related to the industry is significantly lower in 2020 than in 2019, it is likely to pick up again moving into 2021.</p>

Objective:	Repositioned:
<p>Objective #2 - Boost tourism education and training across New Brunswick</p> <p>Initiatives:</p> <ul style="list-style-type: none"> • Expanding tourism career planning in New Brunswick middle and high schools • Expand community college programming with a specific focus on international students • Leverage FutureReadyNB • Formalize entrepreneurship training and promotion within the tourism sector 	<p>Phase 1 of the Tourism Workforce Development Plan featured considerable work in this area. There is agreement to expose more students to the tourism industry with both the English and French K-12 systems (the FutureReady MOU). Because the time horizon on this is 2, 3 years and more, these efforts should be renewed in 2021.</p> <p>Much experiential learning could be moved online in the short term. Students, for example, could be hired to survey or otherwise engage with customers in a virtual setting. The students would learn about the firm and the firm would get valuable intelligence on their customer base.</p> <p>College-level enrollment at the NBBC has taken a significant hit because of the Covid-19 pandemic. However, more broadly there is work to be done to promote college training in tourism fields. This should not be just the responsibility of the college. TIANB, NBCC and other partners should work together on a campaign to promote tourism courses at the NBCC. This should include a renewed focus on international students in 2021 and beyond.</p> <p><i>Entrepreneurship in tourism</i></p> <p>Nearly half of the firms responding to the survey are or might consider selling their business in the wake of Covid-19. This is a challenging time. It is likely many tourism entrepreneurs will retire or otherwise leave the sector. However, moving forward New Brunswick will need tourism sector entrepreneurs – even more. While not a top priority in the short term, looking out 12 months and beyond this will become an increasingly important challenge and opportunity.</p>

Objective:	Repositioned:
<p>Objective #4 - Target specific demographic segments</p> <ul style="list-style-type: none"> • Indigenous workers • 55+ workforce • Immigrants • International high school students • Bilingual high school students • Boosting college graduates • Persons collecting EI • Persons with a disability • Temporary foreign workers (TFW) • 'Gig' jobs in tourism 	<p><i>Gig jobs in tourism</i></p> <p>The gig economy, since COVID-19, has become more and more important. Home delivery is the most pronounced version of this but there are other sectors emerging where workers are paid on a 'gig' basis. This is one way for firms to manage costs but many workers like it because of the flexibility and the opportunity to work for more than one employer.</p> <p>Related to this, a new online platform out of Halifax is facilitating Cluster Employment (where two or more firms co-create a full -time job). This could be promoted within the tourism sector in New Brunswick.</p> <p><i>High school students</i></p> <p>The one noticeable demographic group that employers found challenging to hire this year was students. Of the 28 firms/organizations who indicated on the survey they were having challenges recruiting staff, 20 of them indicated having difficulties recruiting students (71% of the 28 firms having challenges). This could be related to the income support programs offered by the federal government but moving forward it is important to encourage students to take jobs in the sector for work experience, to earn income and to test drive the sector as a potential career option.</p> <p><i>The 55+ workforce</i></p> <p>In the short term, this segment of the workforce will be harder to recruit but moving forward it remains a key target market for summer, seasonal and part time workers.</p> <p><i>Immigrants/international students</i></p> <p>The ability to attract (or hire secondary immigrants who come with primary applicants) will be curtailed for some time – but this target market remains a key source of workers into the future.</p>

9.2 Implementation

The implementation of the Workforce Development Plan has been impacted and will continue to influence its implementation throughout 2020 and 2021.

Because of the Covid-19 pandemic, the revised plan will focus on four areas through the rest of 2020 and 2021. It will be re-evaluated later next year. The four areas of workforce development focus will be:

1. Supporting the industry's training needs arising from the Covid-19 pandemic.
2. Promoting tourism career awareness and experiential learning for high school and post-secondary education students (e.g. advancing the MOU).
3. Promoting and encouraging uptake of the MAGNET job matching service.
4. Exploring the potential of the Gig economy and job sharing including which tools would be facilitate this approach to meeting labour demand.

Other targeted initiatives related to the development of specific segments of the workforce will be implemented in Year 3 of the plan.

TIANB will work with the steering committee to secure three-year funding to move forward on the implementation of the updated workforce development plan.

9.3 Measurement/Progress dashboard

Ongoing interaction with the industry is more important than ever - particularly in 2020 and 2021 as the industry hopefully starts to emerge out of Covid-19. TIANB will continue to survey its membership and report on results and will also report on Statistics Canada data as well as Tourism HR Canada data on the state of the industry. There will also be ongoing reporting on specific workforce development plan initiatives.

TIANB will work with its partners to develop a progress dashboard that will include:

- Statistics Canada data on tourism workforce trends
- TIANB tourism industry survey results
- Progress on specific objectives (e.g. # of high school students involved in tourism-related experiential learning)

The goal is to have this dashboard in place by early 2021.

Appendix A: Survey of NB tourism businesses

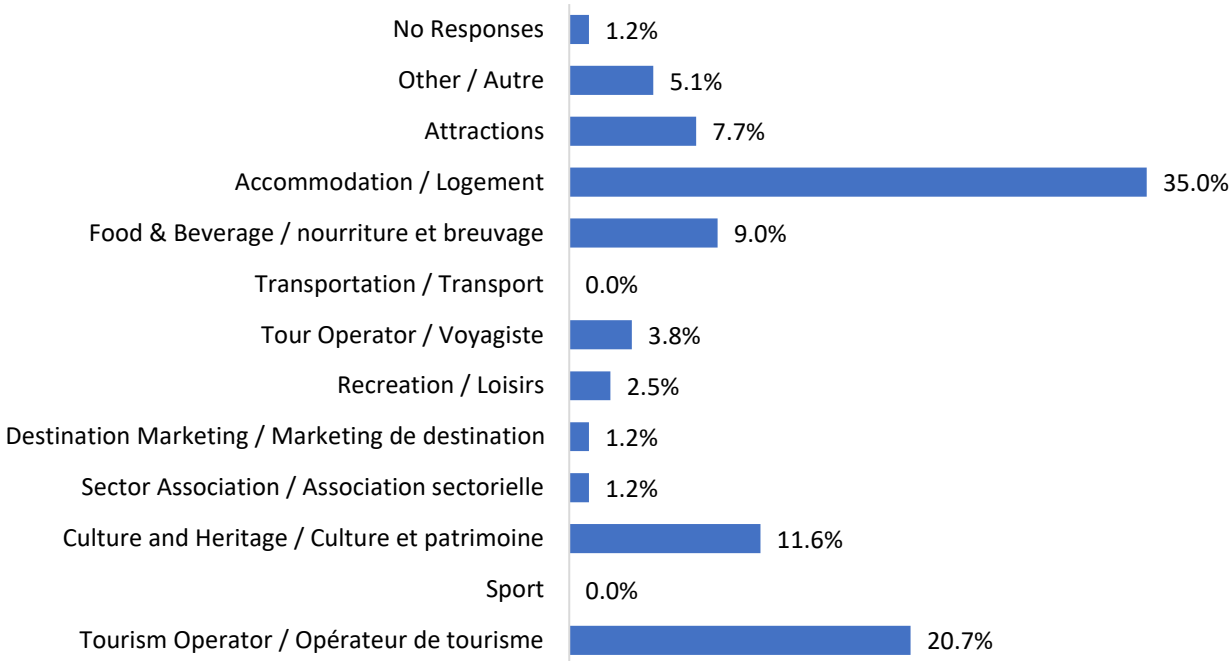
Taking the pulse of NB tourism businesses

In order to determine how Covid-19 was impacting New Brunswick companies in the tourism sector, a survey was conducted in August 2020. A total of 77 firms responded to the survey (not all firms answered all questions). The surveys were conducted using a mix of telephone interviews and online surveys.

Responses by industry

The most responses were from accommodations firms as 27 of the 77 respondents were from this sector (35%). The second largest response was from tourism operators (20.7%) followed by culture and heritage organizations (11.6%). Food and beverage firms and attractions rounded out the top five.

Figure 1: Breakdown of respondents by industry (% of total)

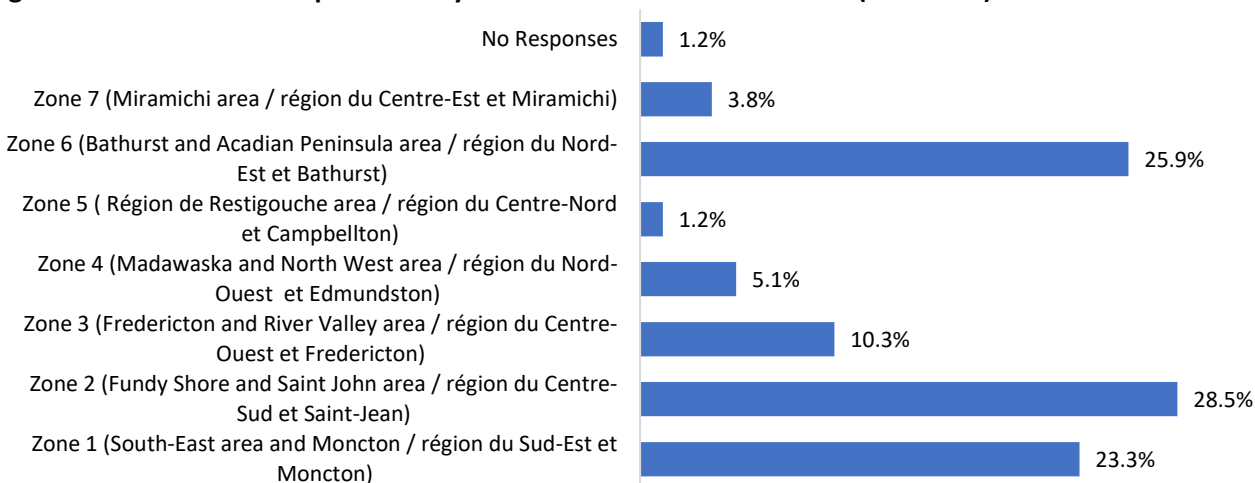


N=77.

Location within New Brunswick

The Fundy Shore and Saint John region provided the most responses followed by the Bathurst and Acadian Peninsula region and the southeastern New Brunswick/Moncton region. There were few responses from northwestern New Brunswick and from the Miramichi region.

Figure 2: Breakdown of respondents by location within New Brunswick (% of total)



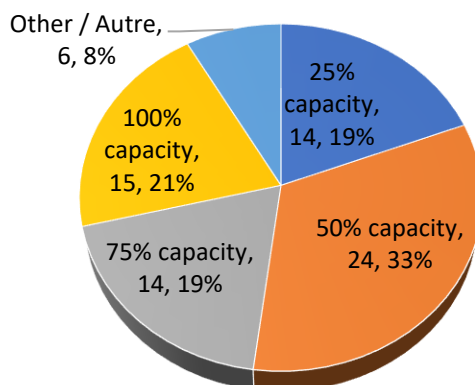
N=77.

Activity in Summer 2020

The survey was conducted in August 2020 in the height of the tourism season. Firms/organizations were asked to provide the level at which they were conducting business (capacity compared to pre-pandemic norm). Almost all of the firms/organizations were operational as 73 were open at some level of capacity. Only three were not operating (one did not respond). Compared to pre-pandemic levels, only 15 (21%) were operating at full capacity in August 2020 compared to the same period last year. Another two out of five (19%) were at 75% capacity, one in three (33%) were at 50% capacity and 25% were operating at only 25% capacity compared to last year. While the question was not explicitly asked the reasons for lower capacity could include fewer customers as well as social distancing and other virus mitigation rules.

When asked about 2021 only 31 firms/organizations (40%) were sure they would be opening in 2021 while only one was sure it would not be opening the other 45 firms were unsure. Seventeen firms/organizations provided commentary on their 2021 plans. Most of the comments indicated an absolute need to be open in 2021 as there is no other choice.

Figure 3: Number and share of firms by current operating capacity (% of total)



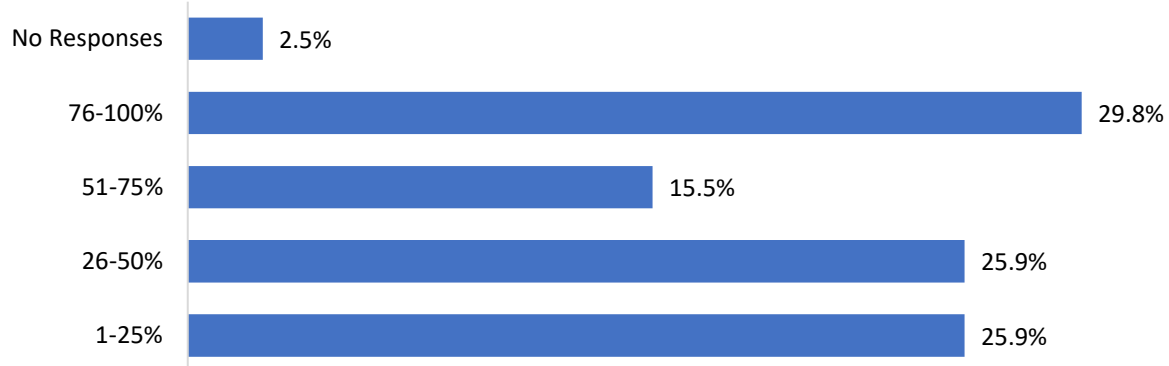
N=73.

Staffing levels compared to last year

The firms/organizations were asked to compare the percentage of employees on payroll in July 2020 compared to same month last year. Only 30% had roughly the same level of employment this year compared to last (between 76%-100% of last year's employment level). Twelve firms (15.5%) had between 51-75% on the payroll and over half of the firms/organizations had less than 50% staff this year in July compared to last.

A dozen firms/organizations provided additional commentary. Almost all of the comments were related to employees not wanting to return to work either because they were receiving government income support or other reasons.

Figure 4: Percentage of employees on payroll this year compared to last (% of firms)



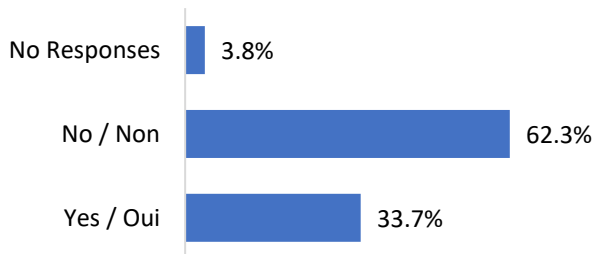
N=77.

Shifting workforce patterns

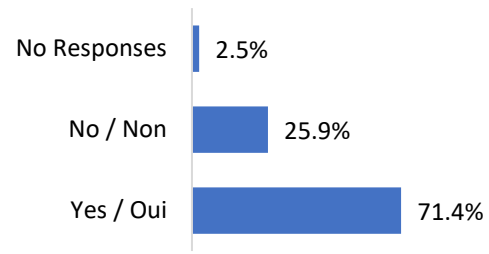
In response to the pandemic more firms have increased part time/casual workers. One out of every three survey respondents have increased their part-time/casual workforce this year compared to previous years. Family members have been asked to pick up the slack. Over 70% of firms/organizations said that family members have taken on more responsibilities in the wake of Covid-19.

Figure 5: Shifting workforce patterns (% of firms)

Increase part time/casual workers



Family members taken on more work

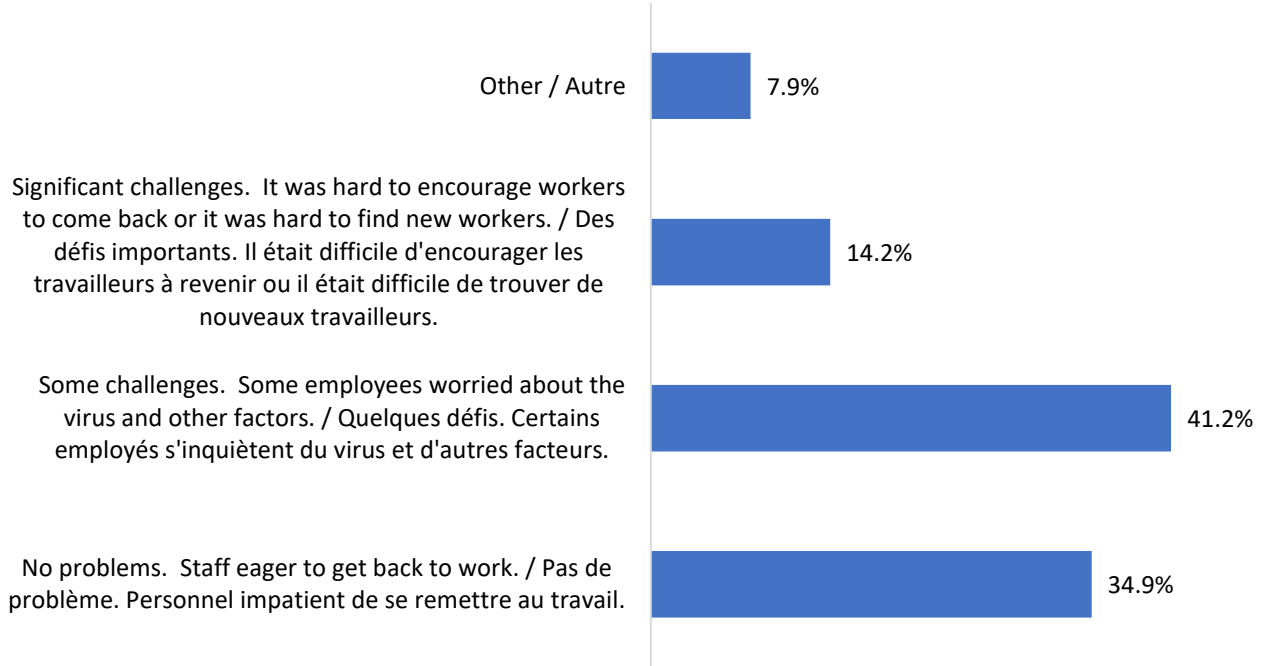


N=77.

Attracting back employees post-Covid-19

Only 14% (or 9 firms) indicated it was a significant challenge to bring back staff this year. However, over 40% (26) said there were some challenges such as employees being worried about the virus and only 35% (22) said there was no problem at all as staff were eager to get back to work.

Figure 6: Difficulty level bringing back employees after Covid-19 (% of firms)

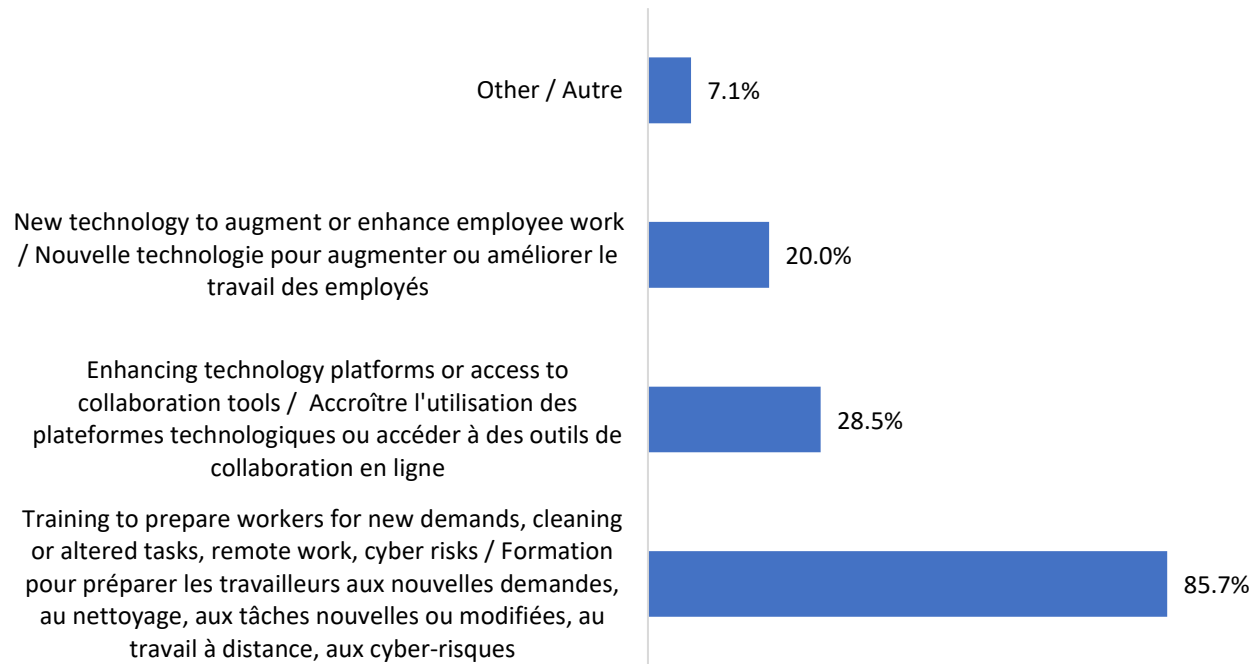


N=77.

New training and skills requirements/investments

Almost all firms reported they had implemented new training related to adjusting to the pandemic. About 30% (20 firms) invested in technology/collaboration tools and one in five firms (14) invested in new technologies to augment or enhance employee work. When asked for specific areas of focus, the top responses related to cleaning requirements.

Figure 7: New training and skills required in the wake of Covid-19 (% of total)



N=77.

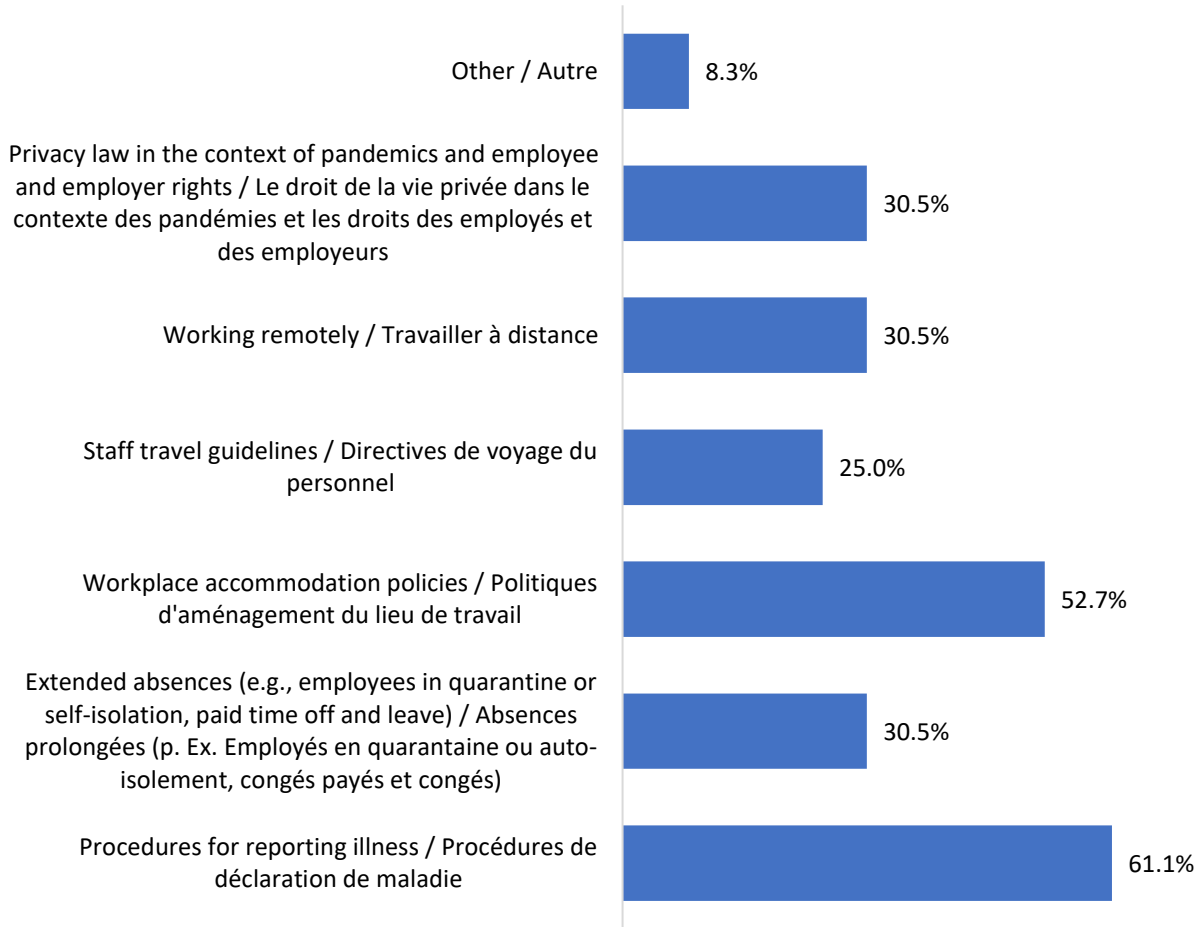
Remote work

In general, the tourism industry is not as conducive to remote working as many other service industries. When asked if any staff are working remotely, 25% of the firms/organizations responded in the affirmative. The top work being done from home include marketing, client relations, finance and e-commerce. Thirty-one firms (40%) indicated they expected to continue using remote workers for these and other related functions into the future.

Changing HR policies

A little under half of the firms/organizations formally changed their human resources policies in 2020 to address issues related to Covid-19. The top change related to procedures for reporting illness followed by workplace accommodation policies. Eleven firms (14%) modified their policies related to extended absences (e.g., employees in quarantine or self-isolation, paid time off and leave) and 11 (14%) updated policies related to working remotely.

Figure 8: Share of firms changing HR policies by category

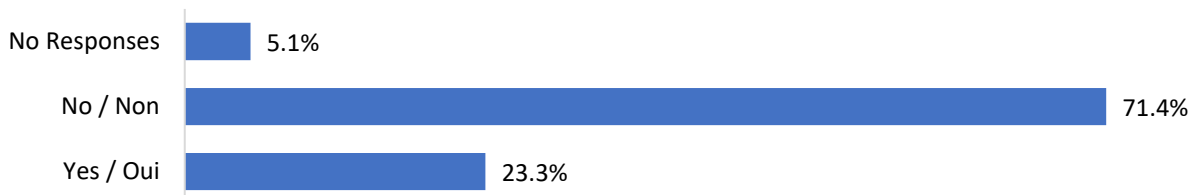


N=36.

Recruiting staff

As of August 2020, most firms were not actively recruiting staff. Only 18 of the 77 firms/organizations were currently recruiting staff (23%) while 55 were not (71%) (5% did not answer the question). Of those firms/organizations actively recruiting staff the top tools were word of mouth (16 firms/89%), social media (15/83%) and job recruitment websites (12/67%). The Magnet platform was only being used by two of the firms (11%).

Figure 9: Currently recruiting staff (% of total)

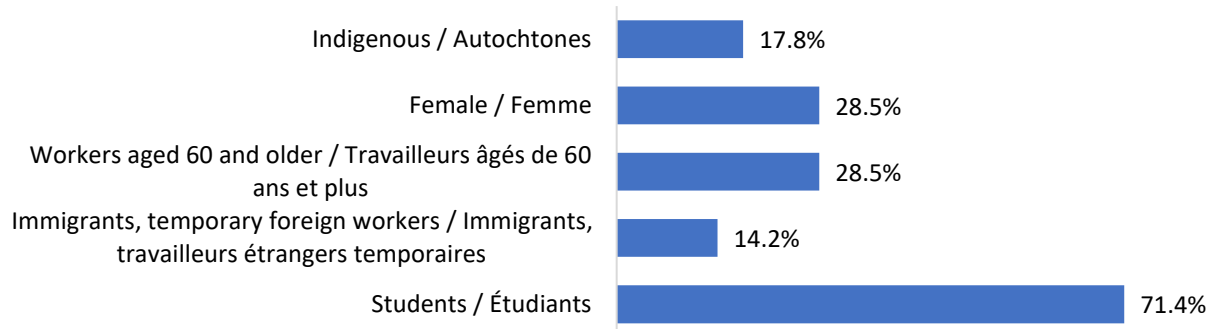


N=77.

Difficulties recruiting staff by workforce segment

Over the course of 2020, firms were asked to indicate which segments of the workforce have they struggled with recruiting so far this year. Only 28 firms/organizations answered this question and the top response by far was student employees as 20 of the 28 firms/organizations indicated having difficulties recruiting students (71%). Older workers and females were mentioned by eight firms each (29%). Only a handful of firms indicated they were having difficulties recruiting indigenous or immigrant workers.

Figure 10: Difficulties recruiting by workforce segment (% of total)

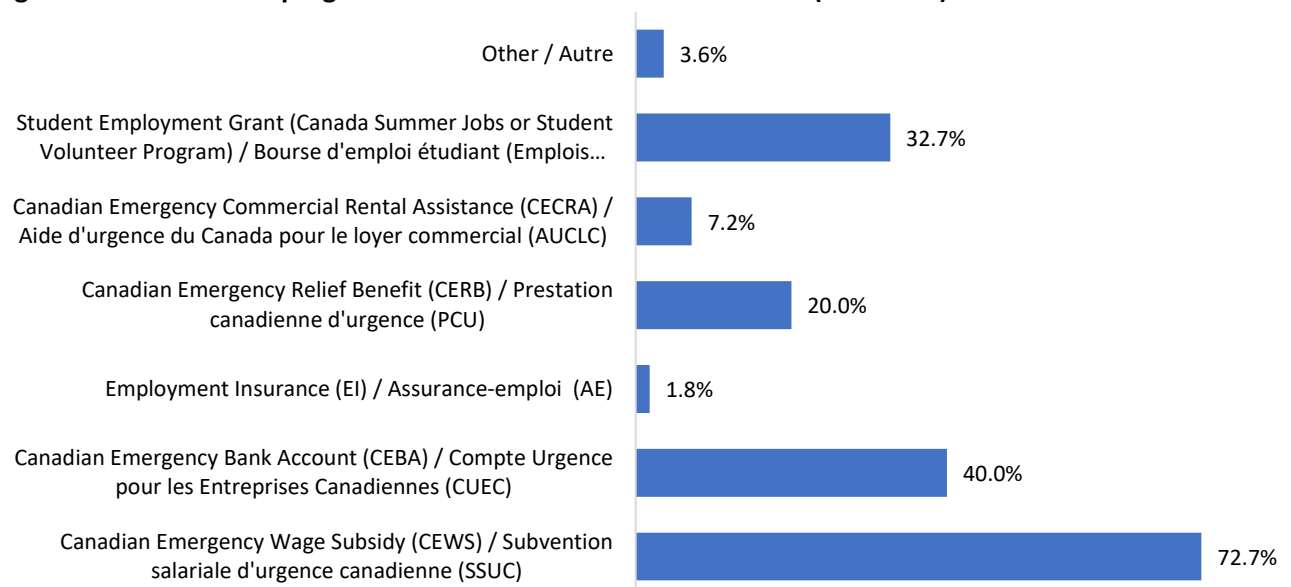


N=28.

Accessing government support programs

The vast majority of firms/organizations have accessed government funding in the wake of Covid-19. Of the 77 firms/organizations, 54 (70%) have received funding, 20 (26%) have not and three did not provide an answer (4%). The top accessed program was the Canadian Emergency Wage Subsidy (CEWS) (73% of firms) followed by the Canadian Emergency Bank Account (CEBA) (40%) and the Student Employment Grant (Canada Summer Jobs or Student Volunteer Program) (33%).

Figure 11: Government programs accessed in the wake of Covid-19 (% of total)



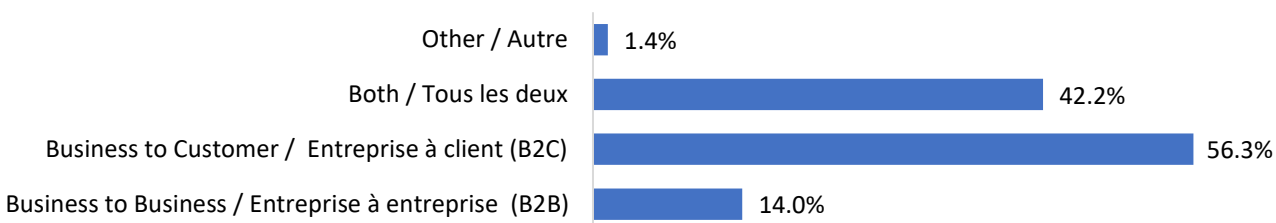
N=55.

Exposure to different markets

Most of the firms and organizations responding to the survey are mostly focused on the business to customer market (56%). However, over two out of every five responding firms focus on both and 10 focus primarily on the business to business market.

Firms/organizations were asked how Covid-19 is impacting each segment. Among those who responded, the business-to-business market has almost completely disappeared this year and the business to customer market is down sharply. Several firms/organizations reported revenue down 90% or more this year.

Figure 12: Business focus by market segment (% of total)

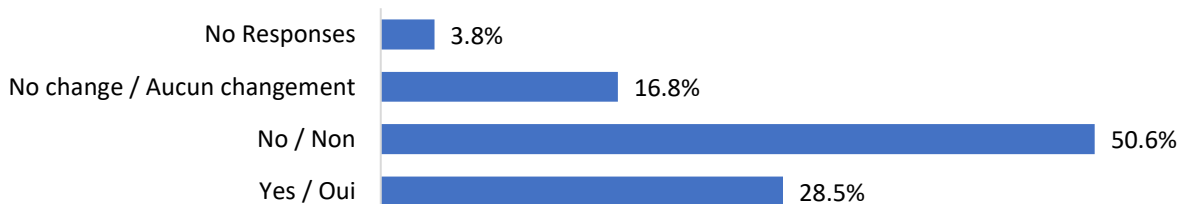


N=71.

The Atlantic Bubble

On a relative basis, the New Brunswick tourism industry has not been as reliant on other Atlantic provinces compared to the internal market (New Brunswickers) and residents of Quebec (and to a lesser extend Ontario and international). When asked if they are benefitting from the Atlantic Bubble only 28.5% indicated yes (22 firms). Over 50% said there was no benefit from the bubble. When asked specifically about where customers come from, 55% of firms/organizations said that pre-Covid-19 they were reliant on markets outside the bubble for over 50% of their annual revenue and only 10 of the 77 organizations (13%) were minimally reliant on customers from outside the bubble.

Figure 13: Benefitting from the Atlantic Bubble (% of total)

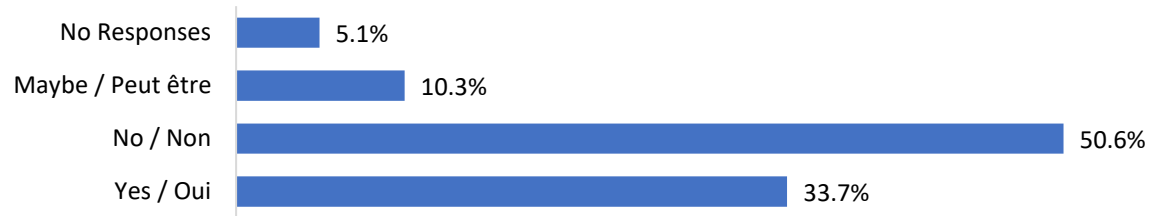


N=77.

Potential to sell their business

One in three of the firms/organizations responding to the survey indicated they are considering selling the business and another 10.3% indicated 'maybe'. This means that nearly half of the firms responding to the survey are or might consider selling their business in the wake of Covid-19.

Figure 14: Share of firms considered selling their business (% of total)

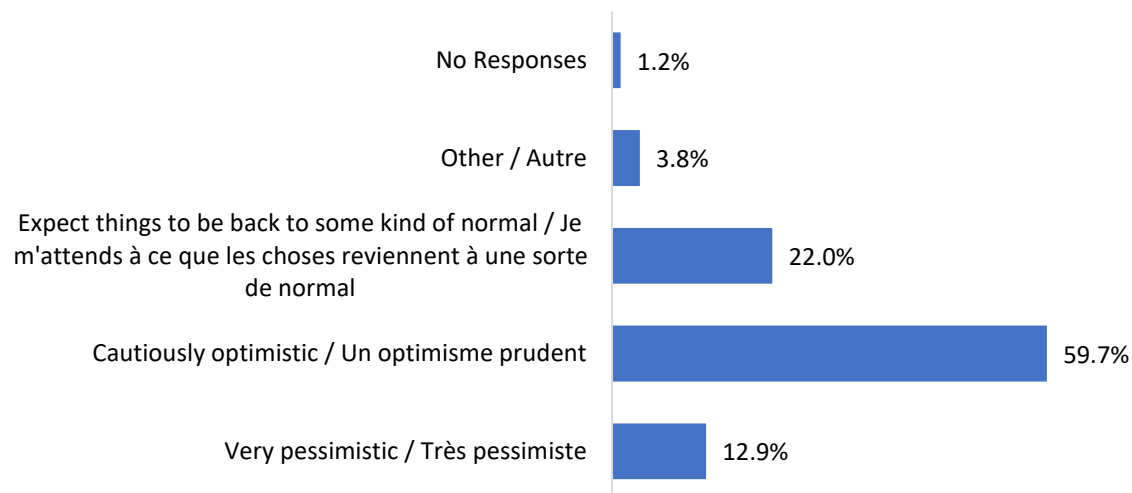


N=77.

Optimism about the future

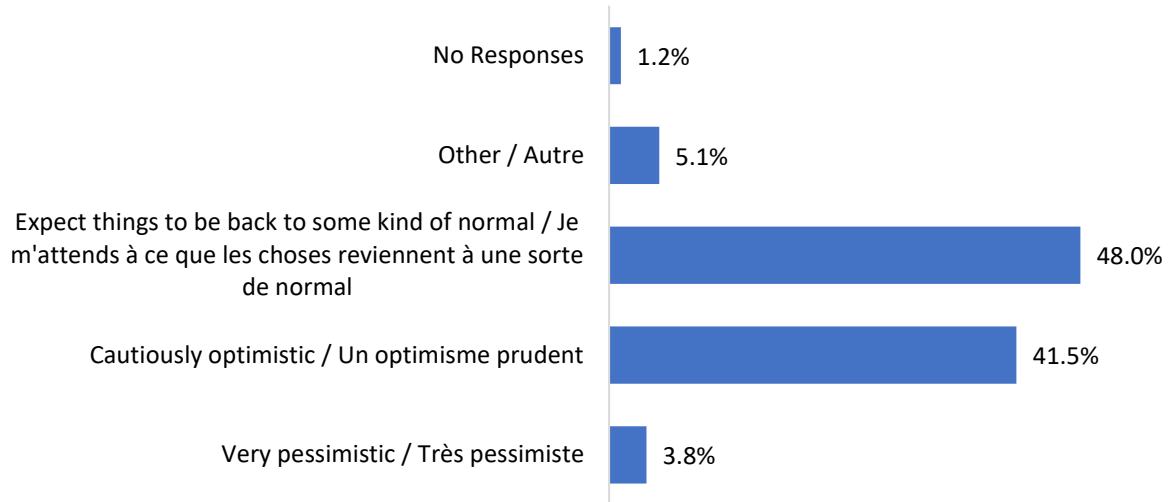
Only less than eight percent of firms reported that 2020 was expected to be about normal (some kind of normal). Another 41.5% were cautiously optimistic while 44.1% were very pessimistic about 2020. Optimism for the 2021 season is higher as 22% expect to be back to some kind of normal and nearly 60% are cautiously optimistic. Only 13% (or 10 firms) are very pessimistic about next year. Beyond 2021, the outlook is even stronger with nearly half of firms/organizations expecting a full rebound and another 41.% are cautiously optimistic. Only 3.8% (or 3 out of 77 firms) are very pessimistic beyond 2021.

Figure 15: Optimism level about 2021 (% of total)



N=77.

Figure 16: Optimism level about 2022 and beyond (% of total)



N=77.

Final comments

When asked if they had any other comments to make, 27 respondents provided additional insights. Most of the comments were related to markets (reliance on Quebec, etc.), the need for continued government support (as long as border restrictions are in place) and the opportunity to expand non-traditional markets such as in-province and Atlantic Bubble.