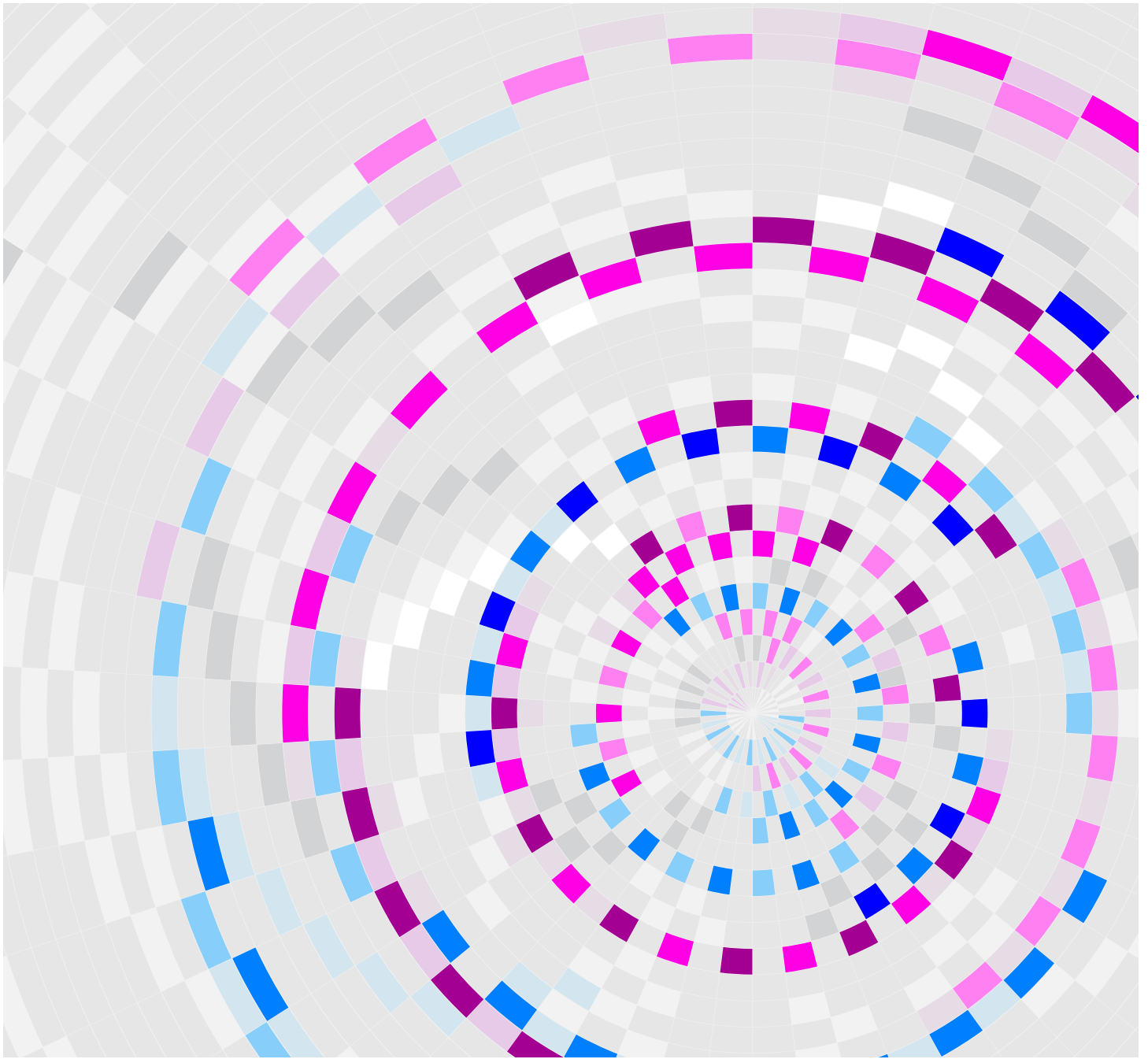




Tourism and Hospitality Emergency Recovery

Final report

March 2024

Blueprint

This report was produced as part of a project funded by the Future Skills Centre (FSC), with financial support from the Government of Canada's Future Skills Program.

FSC is a forward-thinking centre for research and collaboration dedicated to preparing Canadians for employment success. We believe Canadians should feel confident about the skills they have to succeed in a changing workforce. As a pan-Canadian community, we are collaborating to rigorously identify, test, measure, and share innovative approaches to assessing and developing the skills Canadians need to thrive in the days and years ahead. The Future Skills Centre was founded by a consortium whose members are Toronto Metropolitan University, Blueprint ADE, and The Conference Board of Canada

The opinions and interpretations in this publication are those of the author(s) and do not necessarily reflect those of the Future Skills Centre or the Government of Canada.



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Acknowledgements

About the Future Skills Centre

The [Future Skills Centre](#) (FSC) is a forward-thinking centre for research and collaboration dedicated to driving innovation in skills development so that everyone in Canada can be prepared for the future of work. We partner with policymakers, researchers, practitioners, employers and labour, and post-secondary institutions to solve pressing labour market challenges and ensure that everyone can benefit from relevant lifelong learning opportunities. We are founded by a consortium whose members are Toronto Metropolitan University, Blueprint, and The Conference Board of Canada, and are funded by the Government of Canada's Future Skills Program.

Le Centre des Compétences futures (CCF) est un centre de recherche et de collaboration avant-gardiste qui se consacre à l'innovation dans le domaine du développement des compétences afin que toutes les personnes au Canada soient prêtes pour l'avenir du travail. Nous travaillons en partenariat avec des personnes chargées de l'élaboration des politiques, des personnes chargées de la recherche, des spécialistes, des employeurs et des travailleuses et travailleurs, ainsi qu'avec des établissements d'enseignement postsecondaire, afin de résoudre les problèmes urgents du marché du travail et de veiller à ce que chacun puisse bénéficier de possibilités pertinentes d'apprentissage tout au long de la vie. Nous sommes fondés par un consortium dont les membres sont l'Université métropolitaine de Toronto, Blueprint et le Conference Board of Canada, et nous sommes financés par le Programme du Centre des compétences du gouvernement du Canada.

About Blueprint

[Blueprint](#) was founded on the simple idea that evidence is a powerful tool for change. We work with policymakers and practitioners to create and use evidence to solve complex policy and program challenges. Our vision is a social policy ecosystem where evidence is used to improve lives, build better systems and policies and drive social change.

Our team brings together a multidisciplinary group of professionals with diverse capabilities in policy research, data analysis, design, evaluation, implementation and knowledge mobilization.

As a consortium partner of the Future Skills Centre, Blueprint works with partners and stakeholders to collaboratively generate and use evidence to help solve pressing future skills challenges.





Executive Summary

This report provides an evaluation of the Tourism & Hospitality Emergency Recovery (THER) initiative – a national workforce recovery project funded by the Government of Canada's Future Skills Centre during the COVID-19 pandemic.

The COVID-19 pandemic had a disastrous effect on the tourism and hospitality sector after international visits and domestic travel came to a near standstill in March 2020. Tourism and hospitality workers, many of them vulnerable individuals, faced unemployment as operators and were forced to consider pivoting rapidly, suffering ongoing losses, or closing their businesses.

The THER initiative brought together key partners under a collective impact model, led by the Ontario Tourism Education Corporation (OTEC), with the initial goal of providing immediate supports to a sector in crisis. As the effects of the pandemic shifted over the following years, THER partners focused on the longer-term to enhance sector-wide resilience and capacity-building.

The initiative followed an innovation cycle approach – gathering evidence to better understand the sector's evolving needs, followed by rapid testing and iteration of prototype and pilot interventions.

THER resulted in a number of tangible successes that provided direct supports to workers, operators and the sector as a whole. By the time the initiative ended in September 2022, four interventions had been prototyped and a further four had progressed to the piloting stage. It is recommended that these interventions be sustained and further explored by OTEC as standalone projects, leveraging the momentum and pan-Canadian networks generated through the THER initiative.

As well as launching specific interventions, THER was an opportunity to test an innovative approach, which rapidly assembled an ecosystem of partners to solve an urgent sector-level challenge. The learnings from this initiative therefore have general application outside the tourism and hospitality sector, including when collective impact or innovation cycle approaches are considered for implementation during a period of significant crisis or market uncertainty. Recommendations on how these approaches can be implemented successfully are included on below.



Introduction & Overview of THER

Tourism & Hospitality Emergency Recovery (THER) is a national workforce recovery initiative funded by the Government of Canada's Future Skills Centre. It aimed to provide immediate support and long-term capacity-building to an industry devastated by the COVID-19 pandemic, which also disproportionately impacted vulnerable workers including youth, women and newcomers to Canada.

The work was undertaken in two phases. Phase one (March 2020 – March 2021) established emergency response activities to support displaced tourism and hospitality workers in Ontario. Phase two (March 2021– September 2022) expanded the approach to include workforce development and sector-wide collaboration activities. It was also scaled to three new provinces – Saskatchewan, New Brunswick and PEI.

Blueprint acted as an evidence generation partner for the Ontario Tourism Education Corporation (OTEC) throughout both phases of the project. Phase 1 largely focused on building an understanding of the needs of displaced workers and sector employers, and developing tools for reconnecting them to support recovery. Phase 2 placed a greater focus on developing tools and methodologies to advance sector resilience. The four enhanced outcomes of the Phase 2 expansion are included in the Appendix.

A sector in crisis

In March 2020, the Federal government imposed travel restrictions and border closures in an effort to contain the COVID-19 pandemic in Canada, bringing international travel to a near standstill. International arrivals fell by 54 percent from February to March 2020, the largest monthly drop since 1972. Tourist accommodations quickly emptied, and the average national hotel occupancy rate fell to below 20 percent by April 2020.¹

The months and years that followed saw unprecedented crisis for the tourism and hospitality sector – one of the hardest-hit industries throughout the pandemic:

- Tourism-generated GDP fell by 48 percent in 2020, while Canada's national GDP fell at a much slower pace of 5 percent.²
- Tourism spending was cut by 48 percent in 2020.
- Tourism jobs fell 29 percent annually in 2020, with food and beverage services (-32 percent) and accommodation (-35 percent) contributing most to the overall decline.
- Tourism's share of employment fell from 3.8 percent in 2019 to 3.0 percent in 2020
- Eighty-four percent of businesses in the tourism sector experienced a decrease in revenue in 2020 compared with 61 percent of all businesses.

1 Statistics Canada. (2021). *Impact of COVID-19 on the tourism sector, second quarter of 2021*. <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2021001/article/00023-eng.htm>

2 Ibid.

In the early phases of the pandemic, key challenges faced by the sector included:

- **Widespread job losses:** this was initially caused by permanent or temporary reductions in operating hours (employment in the tourism sector fell over 42 percent between February and April 2020).³
- **Rapid operator adaptation:** small and medium operators required immediate tools and supports to strategically pivot and adapt.
- **Lack of relevant and reliable data:** operators and regions lacked local real-time labour market information (LMI) and economic forecasting data to support critical decision-making.
- **Lack of communication with workers:** employment and workforce training partners required virtual delivery infrastructure to support displaced workers, and later jobseekers.
- **Fragmentation among industry networks:** there was a requirement for better-coordinated data, communications and technology across a range of stakeholders.

As the pandemic wore on, the nature of the challenges shifted:

- **Loss of worker attachment to the tourism and hospitality industry:** displaced workers lost confidence in the stability of tourism and hospitality jobs, leading to worker attraction and retention challenges.
- **Increasing concern about constraints on sector-wide growth:** following ongoing restrictions on international tourism and numerous domestic shut-downs .
- **A gap in supports:** there was a shortfall caused by the time lag between the removal of government supports and return to higher levels of tourism revenue.

THER objectives

The primary objective of the THER initiative was to support a more resilient tourism industry by building the sector's capacity to recover from the effects of the COVID-19 crisis, while preparing for potential future crises. Additional objectives were to:

- Inform regional workforce planning by facilitating access to real-time labour market and sector data.
- Gain insights into worker perceptions of and motivations to work in the tourism and hospitality sector.
- Prioritize investment of funds and organizational resources into tools and initiatives with a higher potential for sustainable impact.
- Prototype, test and pilot tools, methodologies and leading practices that have been introduced in other jurisdictions.

3 Labour Market Information Council. (2020). *Sectors at Risk: The Impact of COVID-19 on the Canadian Tourism Industry*. <https://lmic-cimt.ca/publications-all/lmi-insight-report-no-30-sectors-at-risk-the-impact-of-covid-19-on-the-canadian-tourism-industry/>

Key interventions

The THER initiative was based on a series of interconnected prototype and pilot interventions that aimed to collectively build stakeholder and sector-wide capacity to deal with shocks and stresses. All eight THER interventions are included in Table 1. Interventions 1–4 advanced to the final piloting stage, while interventions 5–8 remained as prototypes at the time the THER initiative was completed in September 2022.

Intervention	Description	Target Stakeholder	Needs Supported
1 National communications campaign	Targeted messaging to the tourism and hospitality sector based on evolving industry needs, including ready-to-use communications toolkits	Tourism and hospitality operators	Fills information gaps and provides usable communications resources
2 Destination Dynamics	A local economic impact and labour market forecasting model for the tourism and hospitality sector that provides user-friendly, innovative and interactive analysis	Regional planning entities	Addresses data shortages to help inform regional planning and decision-making
3 National Worker Registry	A database of tourism and hospitality sector workers to support more effective and efficient communication regarding industry updates, job postings and training or upskilling opportunities	Tourism and hospitality workers and operators	Connects jobseekers with employers via a centralized platform
4 CareerAtlas	An online tool that uses AI technology to skills-match jobseekers with career paths, as well as provides labour market data, resources and training	Tourism and hospitality workers	Provides sophisticated training, upskilling and career support services
5 Business Redesign Framework	A tool to help businesses pivot quickly and effectively, developed with the University of Guelph	Tourism and hospitality operators	Provides business planning support during a crisis period
6 SkillsPass LMS	An online system that allows individuals to manage and share their training certificates with current and future employers, industry groups and regulators	Tourism and hospitality workers	Centralizes an individual worker's recognized credentials
7 Tourism SkillsNet Framework	A workforce development network for the tourism and hospitality sector (note: this tool is actively utilized in Tourism SkillsNet North)	Tourism and hospitality workers and operators	Provides free training and support to address workforce labour gaps
8 Propel Student Work Placement Program / Employment Pilots	A program offering paid work-integrated learning and wage subsidies in travel, tourism and hospitality	Post-secondary students and tourism and hospitality operators	Helps address workforce labour gaps

A collective impact approach

THER adopted a multi-faceted collective impact approach, aimed at involving a wide network of key partners from across the sector. This included tourism and hospitality workers and operators; funders and policymakers at all levels of government; federal and provincial tourism and hospitality sector organizations; regional and destination-based organizations focused on tourism marketing and promotion; and employers and consultants engaged in sector workforce strategy and planning.

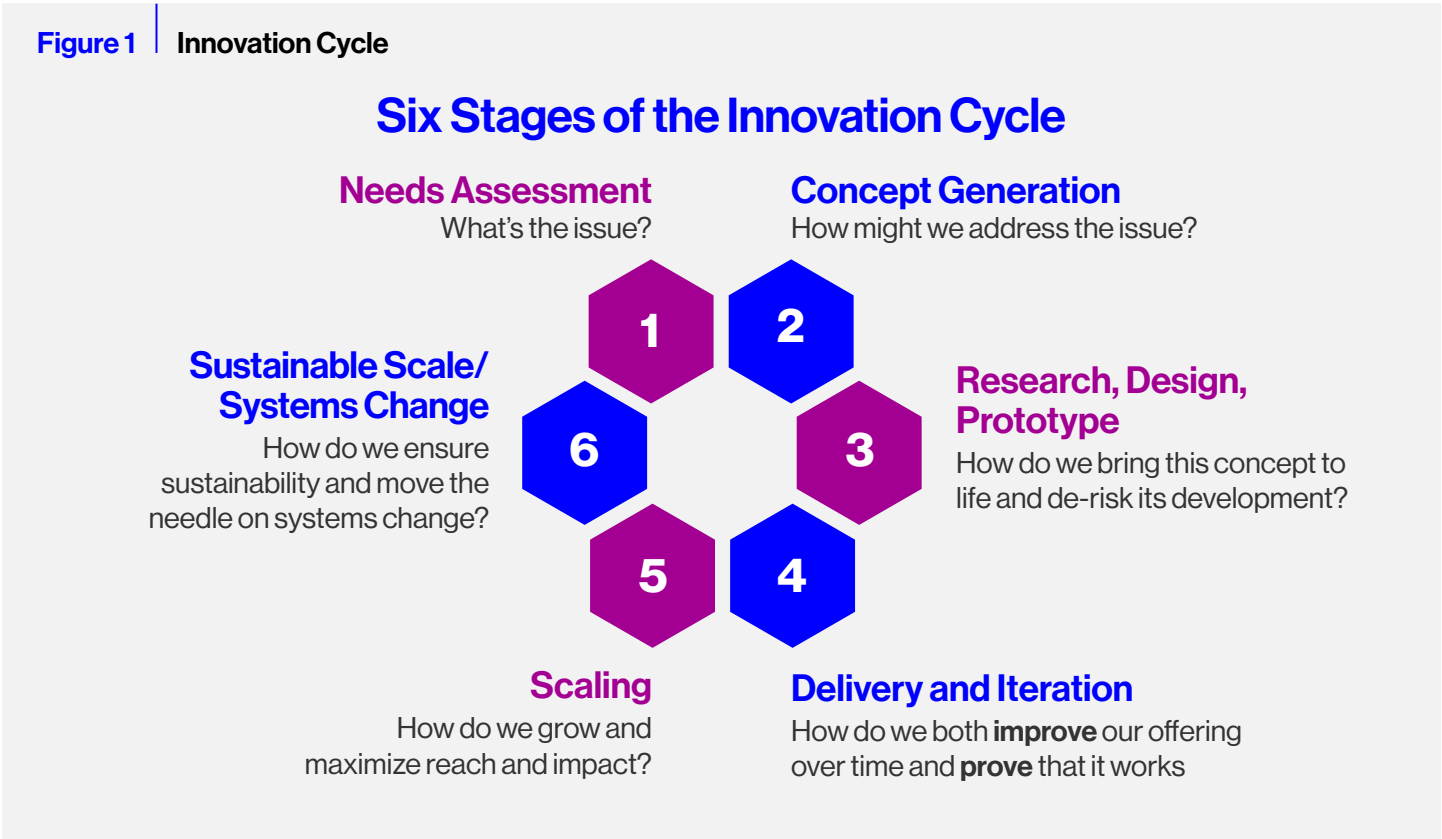
As a collective impact model, THER was advanced collaboratively by a range of key partners:

- **Future Skills Centre (FSC):** primary funding and initiative sponsorship
- **Ontario Tourism Education Corporation (OTEC):** initiative leadership and project management
- **Blueprint:** evidence generation and evaluation
- **Tourism HR Canada (THRC):** tourism industry outreach
- **Conference Board of Canada:** economic impact insight generation
- **Deloitte Canada:** event facilitation and support
- **Beam Group:** ongoing support with key products and activities

There were also several contributing partners, including FutureFit AI, the Tourism Industry Association of Canada (TIAC), Restaurants Canada and regional tourism operators across the four participating provinces.

The innovation cycle

THER employed an approach aligned with the innovation cycle (Figure 1) to facilitate the rapid launch, testing, improvement and piloting of specific interventions that could support the industry throughout the pandemic. Since the initiative focused on developing innovative responses to emerging needs, activities were focused on the first four stages of the cycle: needs assessment, concept generation, prototyping and piloting.



The following sections present detailed information on the THER initiative at each of these first four stages of the innovation cycle, including insights on key successes and opportunities for improvement.



Evaluation Framework

Due to the dynamic and complex nature of the THER initiative, Blueprint used a developmental evaluation approach, generating ongoing feedback to support strategic decision-making and intervention development.

Our approach focused on building an understanding of the strengths and gaps of the set of interventions implemented as part of THER, to both support the development of the model and to generate insights on the effectiveness of this type of sectoral intervention.

Evaluation questions

ESince much of the focus of the THER initiative was the development and prototyping of interventions, our evaluation questions focused strongly on the design and implementation process. There was limited focus on outcomes, as many of the solutions designed by the initiative were only in early phases of delivery at the conclusion of the evaluation.

1. What interventions were implemented as part of THER, and to what extent?
2. How did stakeholders perceive each intervention? To what extent did they see each intervention as adding value, and for whom?
3. What outcomes were achieved by each intervention?
4. What factors facilitated successful implementation of each intervention? Were these factors present during the initiative?
5. What challenges were experienced during implementation of each intervention?
6. To what extent did the set of interventions piloted during the initiative align with the overall goals of the initiative? Were some interventions better aligned, and were there gaps?

Data sources

To answer these questions, we relied on two types of data: perceptions of stakeholders including OTEC, sector partners and businesses in hospitality and tourism; and documentation and administrative data collected by OTEC.

Stakeholder perceptions

- Individual interviews with OTEC's THER delivery team (N=3)
- Pan-Canadian stakeholder consultations (N=6)
- Discussion during project retrospective sessions with THER delivery partners (N=2)
- Survey of participants in pan-Canadian workshops during prototyping (N=18)

Documentation and administrative data

- Documentation developed over the course of the initiative
- Administrative data collected by OTEC on activities and reach
- OTEC administrative data on reach of national communications campaign
- Displaced worker survey carried out during needs assessment



Key Learnings

The insights included in this section have been developed based on one-on-one interviews with key THER partners; facilitated group project retrospective sessions; and a detailed review of documentation developed over the course of the initiative. They provide a comprehensive overview of the strengths and challenges of the THER initiative as a whole, as well as the interventions prototyped and piloted within it. In the final section of the report, we include additional recommendations to guide future activities.

Stage 1: Needs assessment

The needs assessment stage helped THER partners to develop an evidence-based understanding of the specific challenges and opportunities faced by workers, operators and the sector as a whole. This was used to identify key trends at the national, regional and destination-specific level and informed the development of bespoke interventions. As described previously, the needs of the tourism and hospitality sector shifted unpredictably throughout the COVID-19 pandemic, and evidence generation was therefore an ongoing feature of the THER initiative.

Key products included:

- **Market intelligence:** a synthesis of stakeholder HR practices and experiences, gathered using THRC's existing network across the sector (THRC lead)
- **Perceptions sentiment studies:** two surveys – of displaced workers and the general population – aimed at identifying perceptions about work in the sector (THRC lead)
- **Monthly employment trends reporting:** monthly employment data published online (THRC lead)

Benefits and outcomes

- **The displaced worker survey helped to build both a deep and broad picture of the sector's rapidly changing requirements.** There was high uptake of the displaced worker survey (1,500 responses) and the general population survey (2,500 responses), which uncovered a range of insights into people's perceptions about work in the tourism and hospitality sector. The findings highlighted trends with broad application (e.g., barriers to entering the sector, factors that attract individuals to working in the sector) as well as population-specific findings (e.g., newcomer job satisfaction and work experience, Indigenous peoples' interest in working in the sector).
- **Market intelligence activities surfaced important insights that may not otherwise have been well-understood.** During project retrospective discussions, THER partners noted that the market intelligence work in particular helped to answer questions that had never been asked before, and of specific populations that are rarely the focus of comprehensive research in the tourism and hospitality sector. This work also uncovered key factors driving the trends, which could be used to develop more meaningful and sustainable interventions.

THER partners were surprised by some of the insights generated, which underscores the importance of conducting comprehensive and ongoing needs assessment work, particularly during a period of crisis, and where vulnerable populations represent a key demographic group. Many of these insights were later validated by industry stakeholders during the pan-Canadian workshops.

Key enablers

There were a range of key enablers contributing to the benefits and outcomes achieved at the needs assessment stage, including:

- The ability to leverage THER partners' existing expertise, platforms and methodologies, e.g., THRC's tourism and hospitality network, Blueprint's evidence generation expertise, OTEC's centralized communications platform.
- Initial direction-setting sessions at the leadership level, which were collaborative and helped achieve senior alignment and buy-in from the outset.
- Work plan flexibility and an open-minded approach to the potential solutions or interventions required, which lent itself to a more iterative and exploratory approach.
- Ongoing, regular, and collaborative discussions between the THER partners involved.

Limitations and challenges

- **Many of the challenges at the needs assessment stage stemmed from a lack of coordination and communication.** While THER partners supported the initiative's iterative and integrated approach, many lacked visibility into what this meant in practice. This was broadly confirmed during project retrospective discussions. Participants could have benefited from a clearer understanding of the initiative in its entirety, as well as the linkages between various workstreams and interventions, for example, how the survey findings would be used in key reports.
- **The initiative's multi-year timeframes presented several challenges.** THER partners confirmed that identifying key junctures to pause, take stock and re-set the work plan if required could have been helpful given the multi-year timeframes of the THER Phase 2 initiative. Turnover of individual staff members across partner organizations was also a challenge due to the project duration and generally high workforce turnover in 2021 and 2022. Some THER partners felt that the handover process from outgoing to incoming team members was often unclear or rushed, which had a disruptive impact on key deliverables.
- **There were several challenges associated with the perceptions sentiment studies.** Some THER partners felt that the surveys included questions that may have been better suited to a different audience, and could have been difficult to answer for survey respondents. The displaced worker survey was also in-field during the winter of 2021–2022, a low point for the tourism and hospitality industry, with significant survey fatigue felt across the sector. Some partners felt the survey may have yielded different responses if it had been launched at a different time.

Stages 2 and 3: Concept generation and prototyping

While concept generation and prototyping are separate stages of the innovation cycle, they have been combined in this section to reflect the integrated approach OTEC took to blending these activities.

The concept generation stage aimed to develop and incubate flexible, customizable and scalable interventions based on findings from the needs assessment activities. This stage was primarily conducted through internal work at OTEC, with staff continuing to generate ideas to inform the development of prototype interventions.

The prototyping stage tested and validated OTEC-generated concepts to ensure that they helped meet sector needs prior to intervention piloting. Feedback was sought via one-on-one interviews and a series of in-person workshops in each participating province. This stage leveraged the range of skills, tools and expertise provided by THER partners within the collective impact approach.

Key products and activities at the prototyping stage included:

- **Regional readiness assessment:** one-on-one interviews with key tourism and hospitality stakeholders from participating provinces, designed to inform specific regional readiness to receive THER supports (Blueprint lead)
- **Pan-Canadian workshops:** a series of in-person facilitated workshops in each of the participating provinces, aimed at validating needs assessment and concept generation activities and improving THER interventions (Deloitte lead)
- **Destination snapshot reports:** tailored information on each region or destination included in the THER initiative, which was used to inform the pan-Canadian workshops (Blueprint lead)
- **Playbook:** a compilation of destination-specific resources and capacity-building tools designed to address key challenges identified through needs assessment activities (OTEC lead)

Benefits and outcomes

- **The pan-Canadian workshops were an important outcome of the prototyping stage, both because they allowed OTEC to test and validate key insights, and because they brought together key industry stakeholders during a time of crisis.** Seven workshops were held across all four provinces, with over 90 participants attending in-person. This provided a critical platform for collaboration, networking and exchange of best practices. In addition, attendees were provided with tangible resources such as training videos and LMI that could be used in a sector dashboard.

OTEC was also able to generate interest and feedback for the Playbook, which was widely seen as customizable, scalable and responsive to specific regional needs. Attendees registered their interest in specific components of the Playbook that matched their requirements. Hospitality Saskatchewan and Regina Work Prep Centre, for example, were particularly interested in the CareerAtlas tool as a mechanism to better skills-match jobseekers to career paths in the tourism and hospitality sector. A number of attendees also joined the National Worker Registry, which has promoted more centralized engagement across the sector.

A survey circulated following the workshops revealed a range of important benefits to attendees:⁴

- Ninety-four percent agreed or strongly agreed that the workshop **increased their awareness** of additional supports and resources available through the Playbook in their region
- One hundred percent agreed or strongly agreed that they clearly understood how the approaches presented in the workshop are **relevant to their organization**
- One hundred percent agreed or strongly agreed that the supports and resources presented in the workshop could help support **sustainability for the tourism and hospitality sector**
- One hundred percent agreed or strongly agreed that participating in the workshop increased their **interest in exploring or piloting new resources** for sector-wide recovery
- Ninety-seven percent agreed or strongly agreed that workshop **presented net-new insights and information** about their region that they did not know before
- One hundred percent agreed or strongly agreed that the insights presented were **easy to understand**
- One hundred percent agreed or strongly agreed that the workshop discussions facilitated the **exploration of new perspectives or opportunities**

Key enablers

OTEC's dedicated, centralized team was the primary enabler at this stage of the THER initiative. OTEC had clear responsibility for concept generation activities and took an innovative, thoughtful and collaborative approach informed by deep industry experience and broad networks across the sector.

Many of the survey findings above reflect the comprehensive and region-specific information provided to attendees in advance of the workshops, via the destination snapshot reports. These data-rich, tailored reports were a critical enabler for the workshops.

Other important enablers included regular project coordination touchpoints leading up to the workshops, which were well-attended by key THER partners, as well as effective facilitation support.

⁴ Note: the survey had an approximate response rate of 20 percent across all attendees.

Limitations and challenges

- **Limited access to detailed LMI data presented a challenge at the concept generation stage of the THER initiative.** THER partners felt that the long-term sector-wide lack of LMI was exacerbated during the uncertain and unpredictable COVID-19 pandemic. While the needs assessment activities helped to fill some key information gaps, partners highlighted that additional data could have supported a more evidence-based understanding of key challenges, informing more specific and sophisticated prototype and pilot interventions.
- **The pan-Canadian workshops appeared to cause a range of limitations at the prototyping stage.** While there were many important positive outcomes associated with the pan-Canadian workshops, most of the limitations at the prototyping stage also stemmed from these sessions:⁵
 - A lack of virtual attendance options may have limited event participation
 - Attendees were not provided sufficient time to review the destination snapshot reports prior to the event
 - The network created at the workshops was not sustained – a significant missed opportunity
 - Recording of the sessions may have stifled more candid discussions
 - Asking participants to sign up to the Playbook at the end of the sessions felt “flat” – potentially because many of the attendees were not familiar with OTEC or its role
- **Some materials could have been simplified to enhance user-friendliness.** Some workshop participants found the Playbook too complex, interpreting it as overly prescriptive. This may have limited uptake from attendees during the workshops, and could be resolved by developing a clearer, simpler way to communicate the Playbook and how its components could be applied in each region.

Some participants also found the destination snapshot reports too lengthy and dense. This challenge could have been mitigated by summarizing key insights and by circulating the reports well in advance of the workshops, allowing attendees more time to digest the detailed findings.

⁵ These findings draw on discussions between THER partners during project debrief sessions.

Stage 4: Piloting

The final stage of the innovation cycle allowed interventions to be piloted with the sector to support ongoing refinement and improvement. Real-time feedback was gathered as part of this stage, with the objective to deepen THER partners' understanding of what works in practice prior to further scaling.

Key products included:

- **National communications campaign:** targeted messaging to the tourism and hospitality sector based on evolving industry needs, including ready-to-use communications toolkits (OTEC lead)
- **Destination Dynamics:** a local economic impact and labour market forecasting model for the tourism and hospitality sector that provides user-friendly, innovative and interactive analysis (OTEC lead)
- **National Worker Registry:** a consolidated database of tourism and hospitality sector workers to support more effective and efficient communication regarding industry updates, job postings and training or upskilling opportunities (OTEC lead)
- **CareerAtlas (previously SkillsPass):** an online tool that uses AI to skills-match jobseekers to career paths, as well as provides labour market data, resources and training (OTEC and FutureFit AI co-lead)

Four of the eight interventions were still in development when the THER initiative closed, and were therefore not advanced from prototyping to piloting :

- **Business Redesign Framework:** a tool to help businesses pivot quickly and effectively, developed with the University of Guelph
- **SkillsPass LMS:** an online system that allows individuals to manage and share their training certificates with current and future employers, industry groups and regulators
- **Tourism SkillsNet Framework:** a workforce development network for the tourism and hospitality sector (note: this tool is actively utilized in Tourism SkillsNet North)
- **Propel Student Work Placement Program/Employment Pilots:** a program offering paid work-integrated learning and wage subsidies in travel, tourism and hospitality

A range of tangible and specific outcomes were achieved for each of the four piloted interventions, as outlined below.

National communications campaign

The national communications campaign engaged 12 organizations across all four provinces, including through contractual agreements and informal support. As part of the campaign, OTEC and partner organizations designed and developed engaging communications materials in video, print and social media formats. The materials highlighted real-life stories from diverse perspectives across the tourism and hospitality sector, ultimately directing the user to a centralized communications platform at <https://letsgetready.ca/for-workers/>.

Key outcomes included:

- 15 videos
- 2,700 registrants onboarded to the National Worker Registry
- 327,000 visits to the letsgetready.ca website
- 65,000,000 campaign impressions
- A clickthrough rate of 1.2 percent, higher than industry norms, for a total of 775,000
- Nearly 6,000 intentions to register
- An average cost per click of \$0.37, lower than industry norms
- 355 online training sessions completed

Partner organizations noted that the materials aligned well with their own messaging, which reflected OTEC's ability to tailor the content to the current climate of the sector, for example, focusing on training during the shut-down and hiring when re-opening. These materials also allowed partners to reallocate some of their internal funding to other campaigns throughout the year to strengthen their reach and impact.

All partners agreed that the campaign was successful and would recommend other organizations participate in the future. Several partners also indicated that OTEC has a wide range of resources related to the issues facing the sector, including workforce development and labor shortages, training and other resources that would be useful to the different organizations in the sector.

Destination Dynamics

The Destination Dynamics tool has been adopted by Regional Tourism Organization 4 (RTO4) as part of its Economic and Labour Recovery Dashboard. It will be introduced to 15 economic planning stakeholders in the Waterloo, Stratford and Wellington regions, several of whom are members of the Chamber of Commerce. Five interactive dashboards have also been delivered for the Ontario Ministry of Tourism, Culture and Sport.

Destination Dynamics was seen to provide the ideal integration of specific real-time data. Stakeholders appreciated the tool's nimble and flexible approach, which provides ongoing practical support to inform evidence-based decisions about how members invest and support their target populations. Rather than only providing forecast data, Destination Dynamics also addresses current data shortages in specific communities where employment challenges were exacerbated by the pandemic, such as Elora and Fergus.

National Worker Registry

The National Worker Registry, which includes over 2,700 registrants, enhances communication between jobseekers and tourism and hospitality operators – a key gap identified during the needs assessment stage. The Registry helps boost the effectiveness of job postings and skill development opportunities, particularly as the need to attract workers back to the sector increases post-pandemic .

CareerAtlas

The CareerAtlas tool leverages AI to track individual jobseeker journeys as they enter the hospitality and tourism sector, creating stronger pathways to sustainable employment. Real-time updates are made to available jobs corresponding with individuals' skills and experience.

The tool also aims to increase autonomy for vulnerable jobseekers, including individuals without work experience or who are living in poverty. It takes an empowering, strengths-based approach by highlighting their existing skillset and exploring potential training, upskilling and career opportunities.

Key outcomes included:

- Exploring implementation in Saskatchewan
- Funding secured from IRCC funding
- Two Federal funding proposals submitted:
 - Employment and Social Development Canada (ESDC), March 2022
 - Innovation, Science and Economic Development Canada (ISED), May 2022

Enablers

OTEC's existing network with key stakeholders across the industry was a key enabler for the communications campaign, ensuring that a range of partner organizations were involved. The partner organizations' existing communications channels were also important enablers, including Restaurants Canada's and TIAO's regular newsletters. It was critical to involve individuals with the appropriate experience, internal influence and sector-wide networks from each organization.

Partners appreciated OTEC's collaborative approach of hosting bi-weekly meetings to gather feedback on key products. Through these meetings, partners were able to establish more meaningful connections, which many felt highlighted the need for a greater level of cross-provincial coordination within the industry.

Challenges and limitations⁶

- Delays in implementing the campaign
- Lack of clarity regarding intended campaign outcomes and metrics to monitor and evaluate success
- Communication challenges, including lack of awareness of the bi-weekly meetings by key staff in some partner organizations
- Lack of discussion items at some bi-weekly meetings, leading to cancellations and confusion and knowledge gaps across partner organizations
- Failure to sustain key networks created between partner organizations beyond project completion

⁶ These findings draw on discussions between THER partners during project debrief sessions.



Recommendations and Conclusion

Canada's tourism and hospitality sector has rebounded well from the effects of the COVID-19 pandemic. By the end of December 2022, the number of tourism operators had recovered to 93 percent of 2019 levels,⁷ while jobs in the sector were back to 90 percent of pre-pandemic levels.⁸ In total, tourism contributed nearly \$38 billion to Canada's GDP⁹ and generated \$94 billion in revenue for businesses.¹⁰

The Canadian tourism and hospitality sector's recovery arc aligns with global trends, where international tourism and hospitality is set to consolidate its return to stability backed by pent-up demand and the widespread relaxation of travel restrictions.¹¹

The perceptions sentiment survey, conducted by THRC as part of the THER initiative, confirmed Canadians' confidence and optimism in the sector:

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

Recommendations

Although the sector no longer requires emergency recovery supports, the interventions developed and tested under the THER initiative continue to have relevance and should be sustained.

OTEC should continue to leverage the significant momentum and pan-Canadian networks generated through the initiative, and test and iterate key prototype and pilot interventions. As these tools and approaches are improved, they may also be further explored in additional provinces across Canada. In the coming years, it is recommended that OTEC focus on sustainable, effective implementation of those projects that meet the needs of individuals, operators and the tourism and hospitality sector as a whole.

7 Statistics Canada: <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310022201>
and <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310022301>

8 Statistics Canada <https://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&SDDS=3701>

9 Statistics Canada <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=3610023401>

10 Statistics Canada <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=3610023001>

11 World Tourism Organization

<https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism>

More broadly, OTEC and key THER partners should continue their important work to help build resilience and capacity across the tourism and hospitality sector.

While the THER initiative was sector-specific, general recommendations have been developed to guide initiatives undertaken in other sectors. These may be of particular application to the deployment of collective impact models during a period of significant crisis or uncertainty.

Theme 1: Project management, coordination and communication

- 1.1 At the outset, designate an experienced project manager within the lead organization, with a clear role, responsibilities and accountabilities for delivery across the entire initiative.
- 1.2 Maintain clear, centralized project management controls throughout the initiative to ensure that timeframes are met.
- 1.3 Ensure that the initiative workplan balances flexibility with structure and builds in sufficient slippage time if deadlines cannot be met.
- 1.4 Develop an initiative-wide onboarding package for all participants, including a clear overview of overall objectives, roles and responsibilities of each initiative partner, how key products fit together and specific timeframes for delivery.
- 1.5 The initiative-level project manager should meet with each new team member upon joining the initiative to develop a strong relationship, provide an overview of the initiative and answer any questions the new participant has.
- 1.6 Clearly articulate and document what is required from initiative partners by clarifying roles, responsibilities and timeframes for delivery.
- 1.7 Ensure that all project management touchpoints have a specific purpose and agenda, with clearly assigned tasks and deadlines.

Theme 2: Evidence generation and analysis

- 2.1 Develop a deep and broad evidence base that can be used to inform national, local / regional and population-specific needs.
- 2.2 Ensure that all reports are as digestible, user-friendly and interactive as possible, allowing sufficient time for participants to read materials prior to attending key meetings.
- 2.3 Combine reporting products where there are clear linkages or inter-dependencies to streamline documentation and consolidate insights.
- 2.4 Ensure that the sequencing of key activities allows needs assessment activities to feed concept development, prototyping and piloting, and that the partners responsible for each of these activities are closely coordinated.

Theme 3: Stakeholder engagement

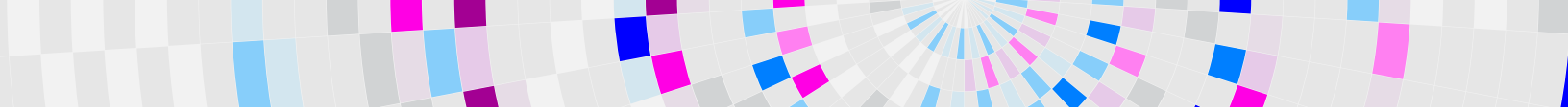
- 3.1 Ensure that the timing of key stakeholder engagement activities aligns with industry availability and workflows.
- 3.2 Clarify the value proposition of attending engagement activities for busy stakeholders.
- 3.3 Provide both virtual and in-person options for attending any workshops.
- 3.4 Sustain any networks developed following stakeholder engagement, e.g., create an ongoing communication forum for follow-up discussion.
- 3.5 Ensure workshop participants have sufficient time to review materials in advance of any meetings to support a highly informed, evidence-based discussion.

Theme 4: Collective impact model

- 4.1 Take a multi-partner approach that actively leverages the existing skills, expertise and tools of individual organizations as well as the collective.
- 4.2 Cultivate a high degree of collaboration, e.g., through regular planning sessions and touchpoints with partners across the initiative.
- 4.3 Where multiple networked interventions form part of a broader package (e.g., a Playbook), simplify the overall approach and value proposition to potential participants, including by developing clear and consistent communications messaging.

Theme 5: Innovation cycle

- 5.1 Follow an innovation cycle approach that supports rapid testing and continuous improvement, particularly in the context of uncertain or unpredictable market conditions.
- 5.2 Take a flexible, customizable approach to developing interventions to avoid being overly prescriptive around specific solutions.



Appendix

Enhanced Objectives of THER Phase 2

1. Research

- Gathering of province-by-province insights into the experiences and goals of displaced jobseekers to ensure that the impacts of displacement can be quantified, and key barriers to re-entering the industry can be identified.
- Scaled deployment of labour market navigation resources to provide aggregated real-time data on the transitions actual workers are making across the labour market to better understand competitiveness and support recovery planning.
- Leveraging of post-secondary research partnerships, along with incoming data, to support business readiness assessments and redesign supports to better prepare for new market and HR realities.

2. Communications and awareness

- Scaled communications and engagement of workers to reach workers at each stage of the recovery; gauge return to work intentions; and advise them of training and hiring opportunities as they emerge across the sector.
- Enhanced communications targeting employers to raise awareness of the risks facing the industry post-pandemic and the need to engage in HR analysis and business redesign to ensure competitiveness.

3. Distribution of THER resources and technology

- Creation of a tool to help triage affected workers into either temporary outplacement or sector-based re-employment streams based on their objective competitiveness and interests. This also enables multiple types of stakeholders to leverage a consistent framework, supporting collaboration across regions to ensure labour mobility and jobseeker options.
- Distribution of research and data resulting from THER initiatives to help industry and community stakeholders target their response activities efficiently and consistently.
- Provision of coordinated training and sector-based re-employment programs to support more effective investment in skills development.

4. Accelerating destination-based recovery

- Curated economic and labour market data provided to support business decision-making at each stage of recovery.
- Needs assessment and asset analysis conducted with affected businesses to define recovery pathways.
- Shared evaluation and tracking models implemented to assess industry capacity and

