

A New Way Forward
– *the story continues*



INDUSTRY OVERVIEW

ATLANTIC ASSOCIATION FOR APPLIED ECONOMISTS

JUNE 27, 2023

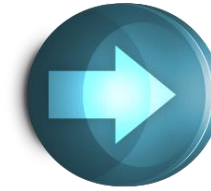


The Nova Scotia Tourism Human Resource Council is a provincial sector council that promotes and enhances professionalism in the Nova Scotia tourism sector. The mission of the Council is to develop a skilled and professional workforce for the Nova Scotia Tourism Industry.



Working with partner associations and stakeholders, TIANS is committed to representing the best interests of the Industry; enhancing and supporting the development of a competitive business environment; advocating on issues critical to the Industry's success; and most importantly, leading Nova Scotia's most promising economic sector.

Tourism on the Move



NOVA SCOTIA - 2022

1.9 million visitors

Increase of 1M visitors compared with 2021
18% lower than 2019.

2021 Revenues approx. \$1B

NATIONAL RECOVERY

Domestic Spend Led 2022 Recovery

Overall At 88% Of Pre-pandemic Levels

International Visitor arrivals gradually improved throughout 2022 – reaching 58% of 2019 levels.



NS TOURISM WORKFORCE

Currently approx. 44,000 employed in NS Tourism Industry

Down from 55,000 in early 2020.

Accommodation and F&B Sectors highest vacancies



Business Information



Workforce Changes



Vacancies, Recruitment,
and Retention



Recruitment and Retention of
Underrepresented Groups



Wages and in
Demand Skills

Nova Scotia Workforce Insights Survey



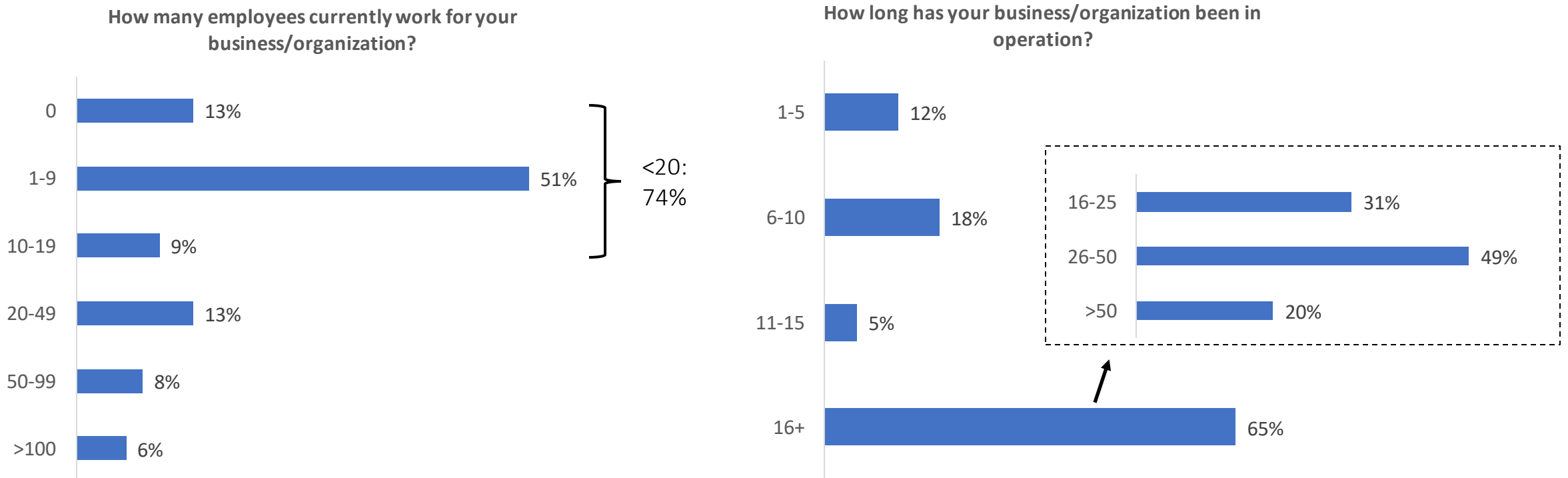
Nova Scotia Tourism Human Resource Council

Business Information

Most businesses (74%) are small businesses with fewer than 20 employees.

28% of businesses exclusively employ full-time employees, while 23% solely rely on part-time employees. An additional 17% of businesses maintain a balanced composition with an equal division between full-time and part-time employees.

70% of businesses have maintained their operations for over a decade, with 20% of them having been on operation for over 50 years.



Base: n=106 (How many employees currently work for your business/organization?); n=77 (How long has your business/organization been in operation?)

Wages and in demand skills

What are the most important technical skills that your business/organization looks for when hiring new people?

- Computer skills
- Communication skills
- Marketing skills
- Problem solving skills
- Management skills
- Cleaning skills

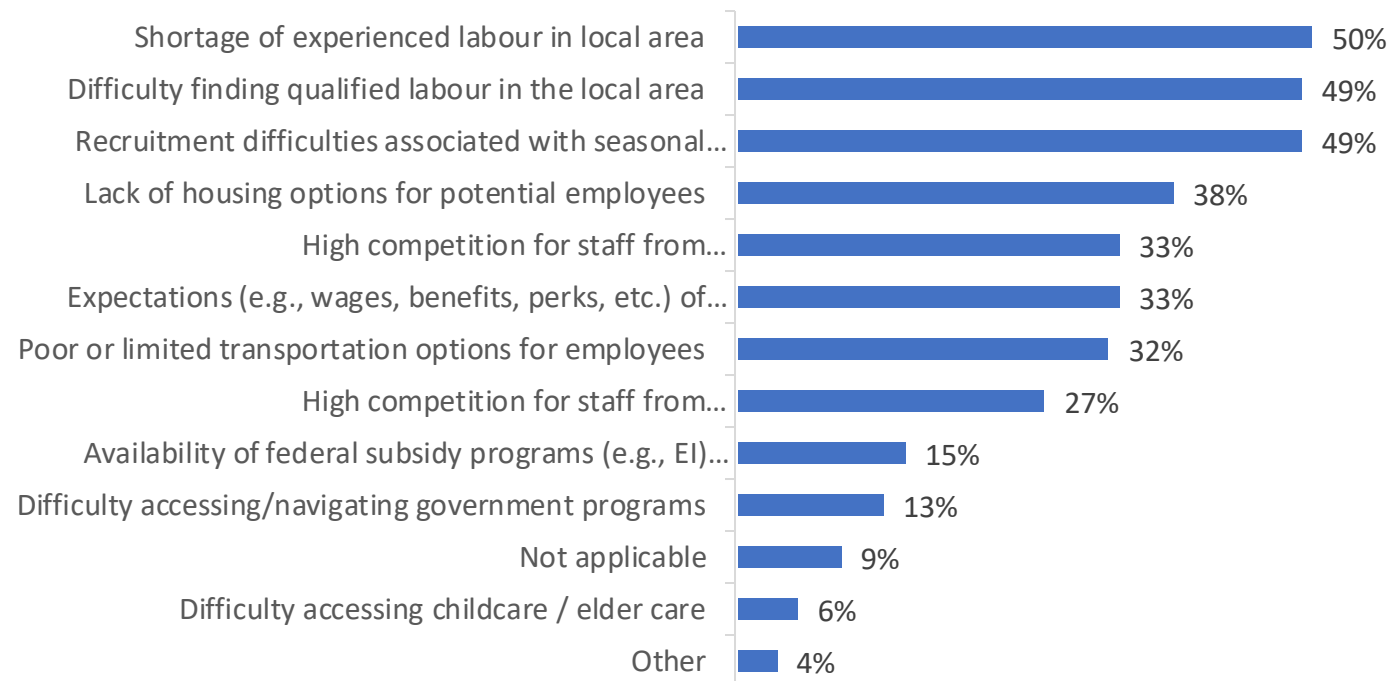
What are the most important personal attributes that your business/organization looks for when hiring new people?

- Positivity
- Attention to detail
- Efficiency
- Good work ethics
- Honesty
- Organization
- Reliability
- Team player
- Willingness to learn

Vacancies, recruitment, and retention

The most common recruitment challenges that contribute to job vacancies are shortage of experienced labour in local area (50%), difficulty finding qualified labour in the local area (49%), and recruitment difficulties associated with seasonal nature of the business/organization (49%).

What are the most common recruitment challenges that contribute to job vacancies at your business/organization?



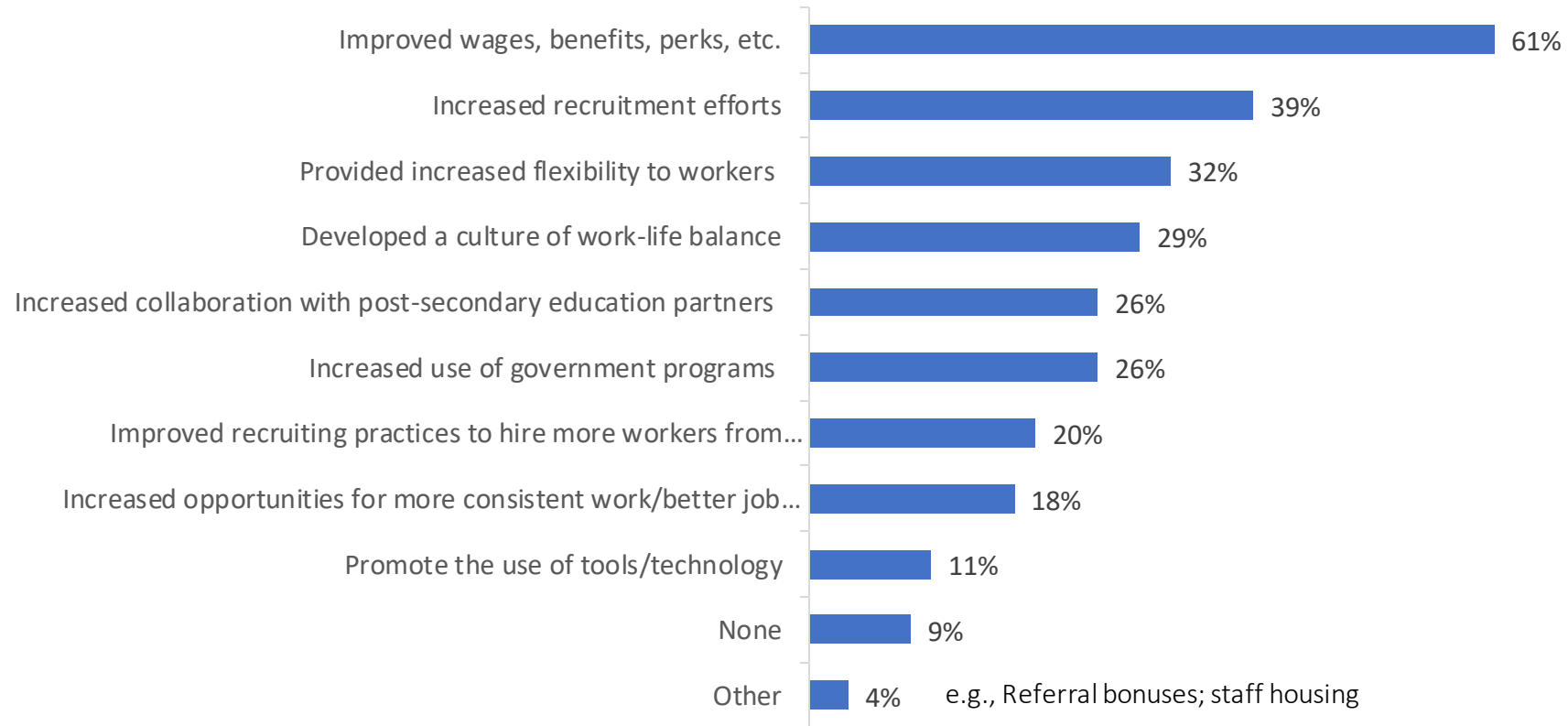
Poor or limited transportation options for employees are a significant recruitment challenge for tourism businesses in Annapolis.

High competition for staff from businesses in the same industry or sector is the top challenge for tourism businesses in Halifax.

Vacancies, recruitment, and retention

The top three recruitment strategies that tourism businesses/organizations in Nova Scotia used to try to reduce job vacancies are improved wages, benefits, and perks (61%), increased recruitment efforts (39%), and provided increased flexibility to workers (32%).

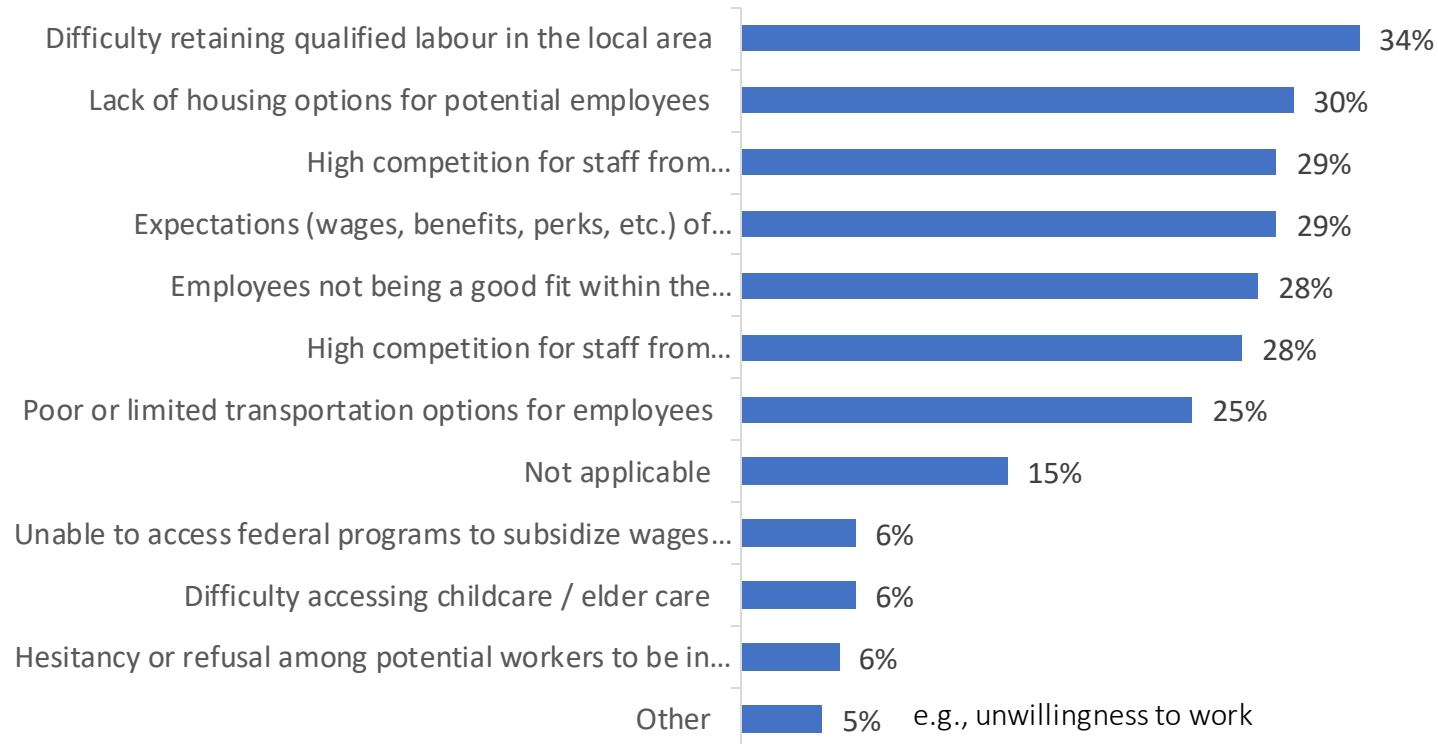
What recruitment strategies has your business/organization used to try to reduce job vacancies?



Vacancies, recruitment, and retention

The most common retention challenges that contribute to job vacancies are difficulty retaining qualified labour in the local area (34%), lack of housing options for potential employees (30%), high competition for staff from businesses/organizations in the same industry or sector (29%), and high expectations (wages, benefits, perks, etc.) of employees (29%).

What are the most common retention challenges that contribute to job vacancies at your business/organization?

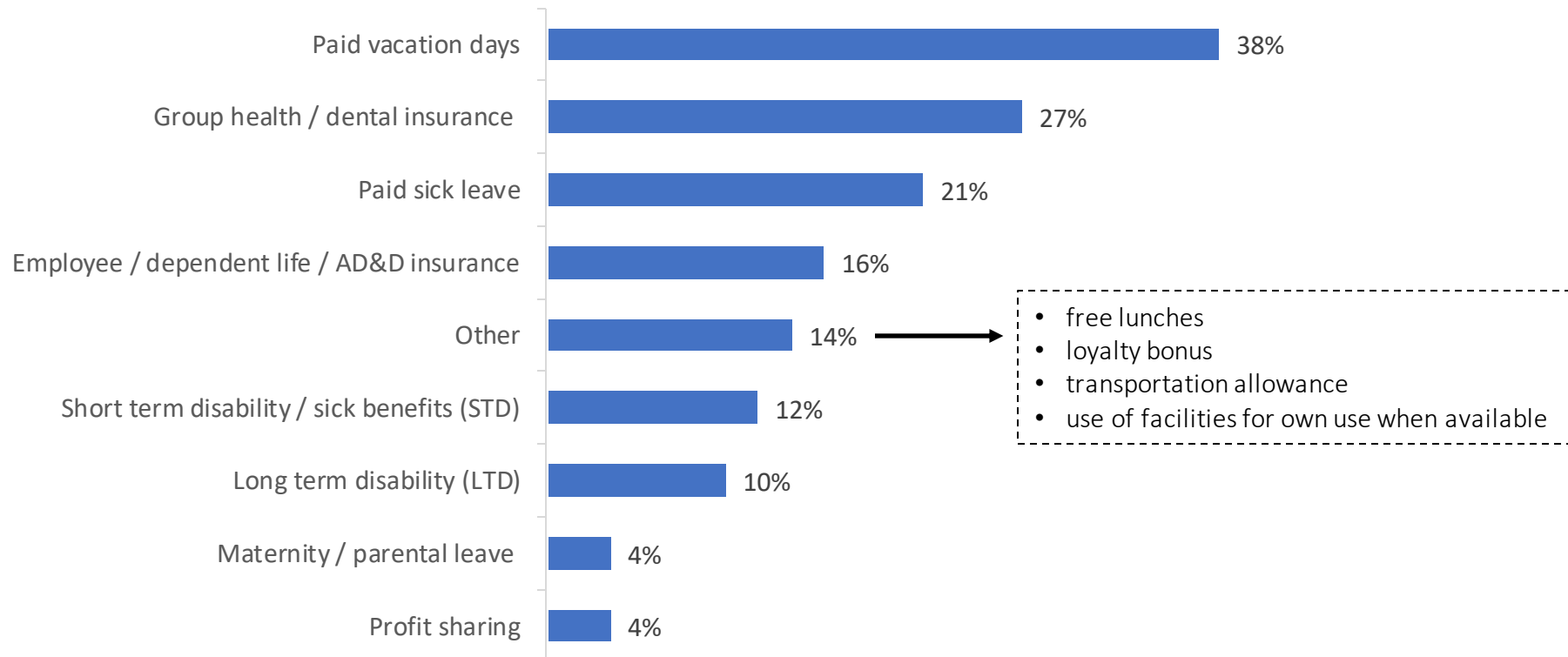


In Halifax, high competition for staff from businesses/organizations in the same industry or sector is the top retention challenge (65%) for tourism businesses.

Vacancies, recruitment, and retention

The main benefits that businesses usually offer to their frontline employees to increase their total compensation offering are paid vacation days (38%) and group health/dental insurance (27%).

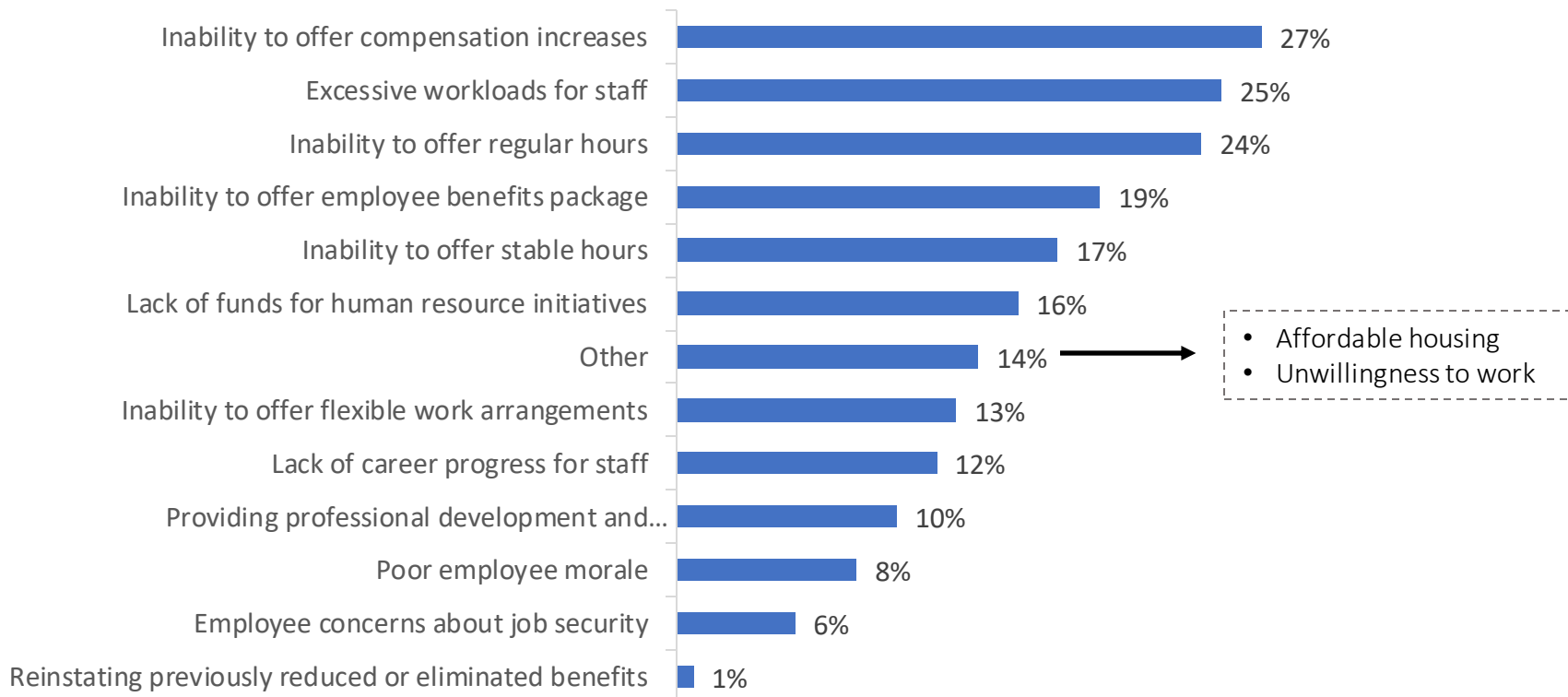
Which of the following benefits does your organization offer to its frontline employees in order to increase your total compensation offering?



Vacancies, recruitment, and retention

Generally, the main challenges that tourism businesses anticipate related to retaining workers in 2023 are the inability to offer compensation increases (27%), excessive workloads for staff (25%), and inability to offer regular hours (24%).

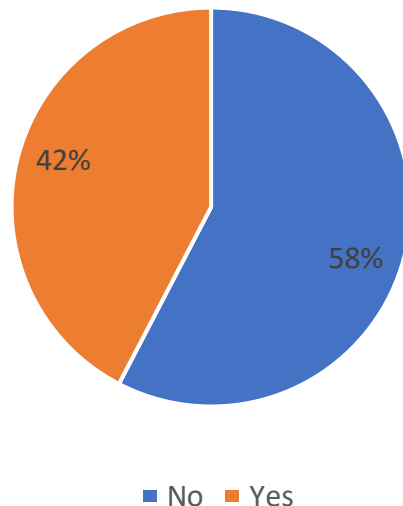
In 2023, which of the following do you anticipate will be the greatest challenges to retaining workers?



Recruitment and retention of underrepresented groups

Fewer than half of businesses (42%) have policies or practices in place to attract or retain individuals from underrepresented groups. Examples of their policies and practices include developing guidelines and policies around diversity, equity, and inclusion (DEI), promoting DEI on social media and distributing job postings to diverse networks.

At your business/organization, do you have policies or practices in place to attract or retain individuals from underrepresented groups?



Examples of policies/practices

- Developing guidelines and policies around diversity, equity, and inclusion (DEI)
- Promoting DEI on social media
- Distributing job postings to diverse networks
- Having designated positions for underrepresented groups
- Building a welcoming and inclusive work environment.
- Taking part in immigration programs
- Encouraging current employees who are from underrepresented groups to refer others within their own community for possible employment
- Being a certified age friendly employer

70% of businesses surveyed from Halifax have policies in place for underrepresented groups.



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The voice of tourism

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