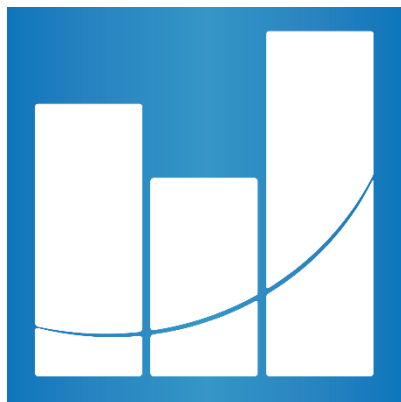


Post Pandemic Scenario Planning  
Summary Report



**NIAGARA**  
**WORKFORCE**  
**PLANNING BOARD**



Niagara Workforce Planning Board (NWPB) is one of 26 regional planning boards in Ontario making up the Local Boards Network, and one of 9 boards making up the Workforce Planning West network.

NWPB is Niagara's trusted community partner, providing data and insight in support of a diverse and talented workforce that contributes to a prosperous community. Our work prepares the Niagara community for the workforce challenges and opportunities of today and the future.

### *Our Vision*

A diverse and talented regional workforce contributing to a prosperous community.

### *Our Mission*

We support our local community organizations by:

Bringing objective, accurate, and future-focused workforce research to enhance planning and decision making;

Working in partnership across Niagara to address workforce development challenges and find solutions.

### *Our Values*

We Listen

We are collaborative

We do the right thing

We are community focused

We are inclusive

We are future aware

This project is funded in part by the Government of Canada and the Government of Ontario. The views expressed in this document do not necessarily reflect those of the Government of Ontario.



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## Executive Summary

As part of NWPB's response to the COVID-19 pandemic, our organization collaborated with eight other workforce planning boards in Southwestern Ontario to develop a post-pandemic scenario planning project. This project recognized that the pandemic has created a new degree of uncertainty in day-to-day life for both employers and job seekers. Indeed, preliminary data from the early months of the pandemic reflected how the employment impacts of the Spring 2020 lockdown varied across regions throughout Ontario.

To explore potential Niagara-focused responses to this uncertainty, NWPB's scenario planning project leveraged survey data, an extensive set of labour force and demographic data, and ongoing consultation with stakeholders to explore four potential scenarios that may emerge in Niagara over 2021 and 2022.

These scenarios were built around two general uncertainties:

- 1) Structural changes to Niagara's available and engaged labour force
- 2) Pandemic-related changes to labour demand in a key employment sector

From these general uncertainties, ongoing research and stakeholder consultation identified the specific uncertainties that best reflected how Niagara may see structural changes to its workforce in the coming two years. These changes would be seen, first, in changes to women's employment and labour force participation and, second, in changes to employment in local tourism supporting industries.

Data from the early months of the pandemic indicated that women in Niagara, compared to the province as a whole, were losing employment and leaving the labour force in greater proportions than men. Annual data confirmed this finding: therein, employment among women in 2020 declined by 6.2% in Ontario, but in Niagara it fell by 9.4%.<sup>1</sup>

With respect to tourism-supporting employment, previous research conducted by NWPB found that slightly more than 40,000 jobs in Niagara could be identified

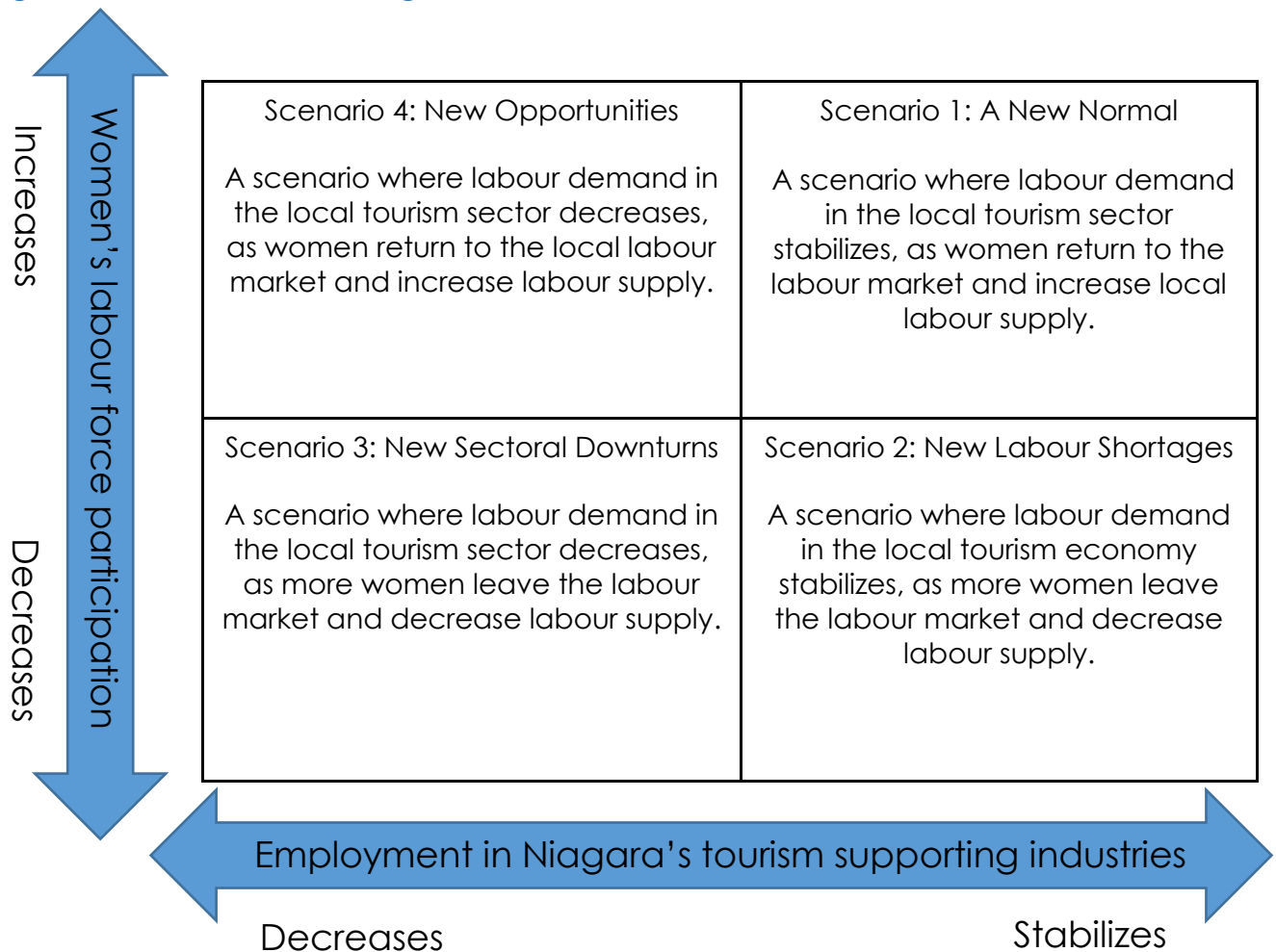
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<sup>1</sup> Statistics Canada, Labour Force Survey, St. Catharines-Niagara CMA, Table: 14-10-0096-01 and Table: 14-10-0090-01

as supporting tourism,<sup>2</sup> with an estimated 36,101 Niagara residents working in those jobs. Preliminary estimates of COVID-19's impact on tourism supporting employment show that the 36,101 employed individuals in 2019 fell to 28,481 employed individuals in 2020 – a decline of 21.1%.

COVID-19's impact on the tourism sector also goes well beyond the effects observed during the 2003 SARS outbreak. Both academic literature and consultation with local tourism-serving employers noted that it was not until 2005 that Niagara's tourism sector began to see a return to a pre-SARS baseline. Because of this, NWPB's scenarios focused on the stabilization, rather than the growth, of the tourism sector within the 2020 to 2022 scope of this project.

Figure 1: Scenario Planning Matrix



<sup>2</sup> Statistics Canada Tourism Satellite Account Tourism Methodology and EMSI Analyst, Niagara Census Division 2020.3 dataset

The balance of this summary document provides highlights on each of the four scenarios noted in Figure 1. This document, as well as a February 2021 update infographic, and NWPB's [tracking dashboard](#) are best seen as part of an ongoing conversation on the impacts of COVID-19. NWPB also prepared an extensive body of research in advance of publishing this summary. Any questions on specific labour market indicators not covered in this report can be directed to NWPB via [info@nwpb.ca](mailto:info@nwpb.ca).

NWPB is committed to ongoing research on the demographics and sectoral trends noted in this report for the balance of 2021 and into 2022. Our current tracking dashboard provides the latest monthly indicators for women's employment and updates on employment in key sectors within the local tourism economy.

The following table provides some of the key contextual data that is referenced throughout this document.

**Table 2: Key labour market and employment indicators<sup>3</sup>**

Niagara Residents	Number of Residents
Estimated Employed in Tourism in 2019	36,101
Estimated Employed in Tourism in 2020 <sup>4</sup>	28,481
Women employed in 2019	96,400
Women employed in 2020	87,300
Women not in the Labour force in 2019	80,600
Women not in the Labour force in 2020	85,500

<sup>3</sup> Statistics Canada, Tourism Satellite Account; EMSI Analyst 2020.3 data set, Niagara Census Division; Statistics Canada, Labour Force Survey, Table 14-10-0096-01; NWPB calculations

<sup>4</sup> This figure is based on an average of monthly tourism estimates from January to October 2020

## Scenario 1: A New Normal

### Scenario Assumptions

This scenario is one where:

- 1) Labour demand/employment in the local tourism sector stabilizes to levels seen in 2020
- 2) Women return to the local labour market and increase the available local labour supply

The scenario further assumes that the second wave of the COVID-19 pandemic will be followed by an easing of lockdowns and restrictions on public gatherings, despite COVID-19 being present within Niagara. This will allow for a tourism season comparable to what was seen in the late summer of 2020.

### Scenario Implications

The primary implication of this scenario is that an increase in labour supply amid reduced labour demand in the tourism sector will help to address some of the pre-pandemic labour shortages that were persistent challenges for the local tourism sector. While it should not be assumed that all women who are returning to the labour force within this scenario will be tourism workers, this project did find that women represent a slight majority of the workforce in tourism-supporting industries.

Historic data shows that Niagara's tourism workforce is approximately 54% women and 46% men.<sup>5</sup> In the two largest tourism subsectors, *full-service drinking places* and *traveller accommodations*, women represent 58% and 62%, respectively, of the employed workforce.<sup>6</sup>

Historic trends also suggest that the non-tourism sectors where women would find employment when returning to the labour force include: health care and social assistance (whose local workforce was 86.4% women); educational services (whose workforce was 68.0% women); and finance and insurance (whose workforce was 67.8% women).<sup>7</sup>

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<sup>5</sup> Statistics Canada, Census 2016, Table 98-400-X2016364

<sup>6</sup> *ibid*

<sup>7</sup> Statistics Canada, Census 2016, custom tabulations

## **Challenges and Opportunities**

While this scenario assumes some level of labour supply/demand balance in tourism, there will likely be areas where tourism employers face challenges meeting their labour needs – particularly in jobs that require close physical proximity to other people. As the economy shifts from pandemic response to pandemic recovery, the local tourism sector will also face competition for the available workforce from other sectors where women have found historic employment opportunities.

### **Recommendations for navigating this scenario include:**

- Leveraging rapid training programs, such as Skills Advance Ontario, to retrain the workforce for emerging entry-level employment opportunities
- Promoting longer-term training programs, such as Second Career, to facilitate the workforce securing more advanced and in-demand skills
- Expanding access to labour market information for employers and the workforce as a means of promoting evidence-informed training and skills development
- Supporting ongoing employer and workforce referrals to Niagara's local Employment Services providers
- Creating standardized training to help front-line workers and employers better navigate changing public health guidelines
- Promoting government supports for tourism operators, such as the Ontario Tourism Economic Development and Recovery Fund
- Promoting government supports for all employers, such as the Ontario Small Business Grant, Ontario Main Street Relief Grant, and property tax and energy rebates
- Promoting workplace mental health initiatives during the transition from pandemic response to recovery

## Scenario 2: New Labour Shortages

### Scenario Assumptions

This scenario is one where:

- 1) Labour demand/employment in the local tourism sector stabilizes to levels seen in 2020
- 2) Women leave the labour market and decrease the available local labour supply

The scenario further assumes that the second wave of the COVID-19 pandemic will be followed by an easing of lockdowns and restrictions on public gatherings. Though COVID-19 will remain present in Niagara in this scenario, it will be at levels that will allow for a tourism season comparable to the late summer of 2020.

The caveat in this scenario is that the pandemic, or pandemic-related challenges, are now acting as barriers to individuals rejoining the labour force and/or seeking out employment opportunities.

### Scenario Implications

This scenario's primary implication for the tourism sector is that it would either replicate or accelerate the labour shortages that existed before the pandemic. This shortage would exist at a time when Niagara's employers reported, through a recent business survey, that they were operating at 60.6% of their total capacity. Employers in *accommodations and food service* (the largest tourism supporting sector in Niagara) reported operating at 49.8% of their total capacity.<sup>8</sup> These industries often house jobs that required, at least before the pandemic, individuals to work in close physical proximity. Though these conditions may have changed amid requirements for physical distancing, the perception may still act as a barrier to successful recruiting.

Historical trends show the potential magnitude of women exiting the labour force and employment. Between February and May of 2020, one woman in five lost employment, and almost 15% of the women who were in the labour force in February had left it in May.<sup>9</sup> These figures should be treated as a worst-case scenario, as they reflect the state of the labour market amid the initial impact of COVID-19. Employment and labour force declines in excess of what was noted

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<sup>8</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey, June 2020

<sup>9</sup> Statistics Canada, Labour Force Survey, Table: 14-10-0095-01



in May of 2020 are possible, but would likely speak to decreased labour demand and increased layoffs, which are not considered within this scenario.

With this in mind, reports from multiple sources including the Organization for Economic Cooperation and Development<sup>10</sup>, the Canadian Women's Foundation<sup>11</sup>, and the Ontario Chamber of Commerce<sup>12</sup> identified pathways to overcoming systemic barriers to women's employment that existed before the pandemic. These pathways could now be used to address the employment impacts that emerged out of COVID-19. NWPB recently supported this type of research at a local level through providing data and insights to Brock University's Niagara Community Observatory (NCO). The NCO subsequently published additional Niagara-specific contexts for gender-based employment challenges.<sup>13</sup>

## **Challenges and Opportunities**

This scenario presents indicators that would create potential labour shortages for the tourism sector, as well as other sectors in the region (page 5 notes non-tourism supporting sectors where women represent a strong majority of the local workforce). Notwithstanding an all-encompassing set of legislative changes at the national and provincial level, there are no immediate solutions to the social, family/child care, and health challenges that contribute to COVID-19 being a barrier to employment.

However, the existing pathways to mitigating the barriers to employment that women faced before the pandemic present as a best course of action to addressing some of the challenges that have accelerated amid the pandemic. Moreover, the current federal and provincial vaccination strategy should also lessen the degree to which COVID-19 acts as a barrier to employment by the end of 2021.<sup>14</sup>

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<sup>10</sup> Organization for Economic Cooperation and Development, *Women at the core of the fight against COVID-19 crisis*, 2020

<sup>11</sup> The Canadian Women's Foundation, *Resetting Normal: Women, Decent Work and Canada's Fractured Care Economy*, July 2020

<sup>12</sup> The Ontario Chamber of Commerce, *The She-Coverly Project: Confronting the Gendered Economic Impacts of COVID-19 in Ontario*

<sup>13</sup> Phillips & Conteh, *The Economic Impact of COVID-19 on Niagara Women in the Workforce*, September 2020

<sup>14</sup> Government of Canada, *Canada's COVID-19 Immunization Plan*

### **Recommendations for Navigating this Scenario**

- Exploring existing family/child care strategies identified by regional stakeholders, as well as provincial and federal policy recommendations that center women's employment as part of an overall economic recovery
- Supporting ongoing employer and workforce referrals to Niagara's local Employment Services providers
- Promoting flexible work arrangements to support working parents
- Expanding access to labour market information for employers and the workforce to promote evidence-informed training and skills development
- Creating incentives and financial supports to help willing workers, who can not access an automobile, find ways of getting to remote job sites

## Scenario 3: New Sectoral Downturns

### Scenario Assumptions

This scenario is one where:

- 1) Labour demand/employment in the local tourism sector declines below levels seen in 2020
- 2) Women leave the labour market and decrease the available local labour supply

This scenario further assumes that the second wave of the COVID-19 pandemic will require a prolonged lockdown or near-lockdown conditions. These would be sufficient to significantly restrict the movement of people and limit the scope of public gatherings, leading to a delayed or severely reduced 2021 tourism season.

### Scenario Implications

This scenario presents a profoundly challenging outlook for the Niagara region. It presumes declining labour force participation and employment for women – of a similar or potentially greater scope than that which was identified on page 8 – and a decline in labour demand and employment in tourism, similarly below the levels reported on page 4. For additional context, 2020's lowest level of monthly tourism employment was seen in June 2020, where the sector employed an estimated 20,127 people, compared to annual estimate of 36,101 people in 2019.<sup>15</sup>

The implications of this scenario suggest that a prolonged period of operating below capacity will have caused tourism employers to further scale back or cease operations. This assumption is based on the findings of the Niagara Economic Rapid Recovery Team's June 2020 COVID-19 Business Impact Survey. Therein, among 169 *accommodations and food services* employers, 10.1% identified being at imminent risk of permanent closure, and 43.8% identified as being vulnerable to closure.<sup>16</sup> This scenario anticipates that those risks and vulnerabilities will have manifested into closures, reductions in operations, and other drivers that would reduce labour demand in Niagara.

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<sup>15</sup> Statistics Canada, Labour Force Survey, Table: 14-10-0095-01, and NWPB estimates

<sup>16</sup> Niagara Economic Rapid Recovery Team, COVID-19 Business Impact Survey, June 2020

As noted previously in this report, changes to women's employment and labour force participation are expected to have ripple effects into other sectors. One additional sector that may face challenges within this scenario is *health care and social assistance*. As of the 2016 census, the local workforce in this sector was 86.4% women.<sup>17</sup> Women leaving employment would likely impact this sector more so than any other, and in doing so create additional social challenges amid the overall pandemic recovery.

### **Challenges and Opportunities**

This scenario presents indicators that would fundamentally change the employment landscape in Niagara. Employers in tourism closing their doors would create unpredictable ripple effects into other sectors. It can, however, be assumed that any hopes for an economic recovery built around supporting an influx of tourists into Niagara in late 2021 or 2022 would be adversely impacted by the loss of local tourism providers. Likewise, reduced tourism operators and fewer tourists into the region would result in reduced economic multipliers from the Canada Summer Games.

The factors which would prevent this scenario from coming to pass are largely tied to the spread of the COVID-19 pandemic's second wave. If the pandemic worsens, and necessitates long-term stay at home orders coupled with regional/provincial lockdowns, then the potential for even a limited tourism season will become increasingly untenable.

Should the second wave ease amid a broad vaccination strategy, then the impacts of this scenario would, consequently, be reduced.

### **Recommendations for Navigating this Scenario**

- Explore opportunities to leverage successes in virtual tourism to provide a new means for local tourism providers to generate revenue
- Develop an economic impact analysis that explores potential outcomes relating to a permanent decline in the local tourism sector

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<sup>17</sup> Statistics Canada, Census 2016, Custom Tabulations

- Develop an economic impact analysis that explores if/how COVID-19 will negatively impact Niagara hosting the Canada Summer Games
- Leverage all available employer supports through the Government of Canada (e.g. Canada Emergency Wage Subsidy; Canada Emergency Rent Subsidy; Canada Emergency Business Account)<sup>18</sup> and the Government of Ontario (Ontario Small Business Support Grant, PPE Rebates, Pension contribution deferral and extension)<sup>19</sup>

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<sup>18</sup> A full list of federal support programs is [available through this link](#).

<sup>19</sup> A full list of provincial support programs is [available through this link](#).

## Scenario 4: New Opportunities

### Scenario Assumptions

This scenario is one where:

- 1) Labour demand/employment in the local tourism sector declines below levels seen in 2020
- 2) Women return to the local labour market and increase the available local labour supply

This scenario further presumes that the second wave of the COVID-19 pandemic will be followed by an easing of pandemic restrictions. This easing will see COVID-19 acting as less of a barrier to employment than is noted in this report's second and third scenario.

### Scenario Implications

The most recent historical data that might shape the implications of this scenario are found in 2012. At that time, Niagara housed approximately 108,500 women in the local labour force. This 2012 figure is 11.8% larger than what was observed in 2020, amounting to an additional 12,800 individuals in the local labour force.<sup>20</sup> Within this scenario, this figure should be seen as a probable upper ceiling on how many women might return to the labour force. However, this figure could be larger if 2020 population migration data (which were not available at the time of this report) show significant changes from historic trends.

The question this scenario must answer is a simple one: where would a large increase in labour supply find employment in Niagara? A comprehensive answer is beyond this scope of this summary, as it necessitates the identification of multiple industry sub-sectors that have the capacity to welcome a large number of employees over the coming two years. However, a preliminary answer can be seen in the recent wave of business investments and expansions that occurred in Niagara's *manufacturing* and *transportation and warehousing* sectors. These gains would inform a deeper level of research and analysis on how an increased labour force could be meaningfully integrated into these sectors.

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<sup>20</sup> Statistics Canada, Labour Force Survey,

## **Challenges and Opportunities**

Successfully pivoting a returning workforce toward specific industry sectors is no small feat. Retraining/cross training of this magnitude must acknowledge that a large, job seeking workforce will have a range of skills, experiences, and educational backgrounds. Without investment and support, some of those individuals may not have a natural point of entry that is relevant to post-pandemic job demand.

Therefore, this scenario would require leveraging existing training and skills development programs, while also creating new ones – noting that new training programs may need to address pre-existing barriers that saw women's employment under-represented within certain sectors.

For example, manufacturing represents a sector that grew through the pandemic. This sector also saw consistent labour shortages before the pandemic and struggled to replace its aging workforce.<sup>21</sup> However, only 20.9% of Niagara's manufacturing workforce are women.<sup>22</sup> Thus, success in this scenario would require identifying and addressing the fundamental question of why women are so far from employment parity in this sector.

Implementing actions under this scenario would also require identifying the specific industry subsectors, and their expected labour needs, at a level of detail that goes beyond the confines of this project. Such an endeavour will require extensive collaboration between workforce development, economic development, and employer stakeholders.

## **Recommendations for navigating this scenario**

- Identifying the skills inherent to sector and occupation specific job demand that can be trained through existing programs (e.g. Skills Advance Ontario; Ontario Job Creation Partnership)
- Enhancing workforce development, economic development, and employer collaboration on the production of sector and occupation specific job demand insights
- Expanding strategic partnerships between workforce development, economic development, and employment services providers

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<sup>21</sup> Niagara Workforce Planning Board, 2019 In-Demand Skilled Trades Report

<sup>22</sup> Statistics Canada, Census 2016, Custom Tabulation



- Identifying the skills that could be rapidly trained through prototype micro-credential courses
- Exploring and addressing barriers to employment in sectors where women are under-represented
- Promoting in-demand skilled trades in the Niagara region and Ontario





## Next Steps on Scenario Planning

NWPB's scenario planning project ends in March of 2021. However, the findings of this project have informed a number of ongoing projects for the balance of this calendar year and into 2022.

## Expanded Tourism and Women's Employment Reporting

In the coming months, NWPB will expand the dashboard we created on this project to offer more insights into the state of employment within the local tourism economy and on changing employment patterns for women. As seen in this report, tourism employees and women have been heavily impacted by COVID-19. We anticipate that efforts to support pandemic recovery for these groups will require timely data with meaningful insights and analysis.

## Comprehensive Gender and Age Data in Our Labour Market Reports

NWPB will be expanding the scope of analysis offered in our Spring 2021 Labour Market Report and Winter 2022 Labour Market Report. These changes will include more detailed labour market insights that capture annual trends in women's employment and youth employment. These will shape pre- and post-pandemic employment benchmarks for individuals who experienced job losses and reduced hours due to COVID-19.

## Examining Proximity to People and Automation Risks in Niagara

Research innovations developed to support this project identified the jobs that require working in close proximity to other people. These same innovations also identify the jobs that are at high risk of automation. As part of NWPB's efforts to look at the future of work amid the COVID-19 recovery, we will be preparing research that identifies a new wave of occupations that may face increased risks of automation and redundancy.

## Exploring Pandemic-Proof Industries

NWPB is developing projects that build partnerships with local organizations and employers to identify industry sectors and occupations that experienced growth during the pandemic. Detailed analysis on these occupations and industries will allow for the production of skill profiles that will ensure retraining/cross-training opportunities are meaningfully aligned to Niagara's emerging job demand and labour market strengths.



# **NIAGARA WORKFORCE PLANNING BOARD**

For additional information on the local labour market, and to review previous publications, please visit our website at [www.nwpb.ca](http://www.nwpb.ca)

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