

WORKFORCE INSIGHT

Hospitality & Tourism in the Southern Gulf Islands



Southern Gulf Islands Tourism Partnership Society

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Canada



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**SOUTHERN
GULF
ISLANDS**

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INTRODUCTION

The April 2020 *SGI Labour Market Gaps and Opportunities Final Report (Phase 1)* recommended a strategy to position the Southern Gulf Island Tourism industry. The study's Implementation Plan scheduled work on a regenerative tourism identity, brand positioning, and communication tools through the balance of 2020.

The identity was proposed to validate the strength, longevity, and sustainability of the tourism industry in the Southern Gulf Islands in order to stabilize a viable workforce. In a post-pandemic world, this purpose is extended to enticing workers back into the tourism/hospitality industry overall as it has become an even more precarious source of livelihood. Young islanders do not have a tangible representation of the Southern Gulf Islands Tourism industry to support them in choosing the sector as a worthwhile professional endeavor and local communities do not have a shared framework to build a basis for regenerative tourism. In fact, local formal and informal surveys suggest that many island residents do not support local tourism. This alone creates a barrier to supporting a workforce based on the visitor economy. Of note, a move toward a more 'preserve and protect' approach within the visitor economy would appease some dissent.

Project Objectives

The project rolled out with two objectives in mind:

1. To recover local jobs lost due to the impacts of COVID19, and
2. To create sustained work for our hospitality and tourism workforce beyond the summer months

Project Purpose

The purpose of Phase II focused is to respond to tourist impressions of the island that were discovered through Phase 1 research and apply the distinctive brand positioning that was developed through Phase 1 to provide confidence in both current and new tourism workforce investment focused on longer terms of work with qualified hospitality staff. This project

- Aligns with the *Tourism Labour Market Strategy*
- Communicates gaps between labour supply and demand by creating a distinct identity for the local tourism industry
- Strengthens the SGI tourism identity to serve as a tool to assist employers in filling their staffing requirements
- Creates tools to support marketing efforts to drive off-season travel to the Southern Gulf Islands therefore addressing unique labour market challenges faced by seasonal rural tourism operations.

- Strengthens the alignment between labour market development and destination development, management and marketing at the provincial, regional and community levels.

BACKGROUND

The 2019-2020 study referenced a consistent underlying theme - the lack of a collective tourism identity for the Southern Gulf Islands. An industry without a distinct and broadly embraced identity struggles to attract a workforce. The collective efforts of Experience the Gulf Islands, Experience the Southern Gulf Islands, and the new Southern Gulf Islands Tourism Partnership have made strides in creating a framework for inter-island collaboration and establishing the region's first Community Destination Management Organization (CDMO). The Southern Gulf Islands does not have a visible identity that reflects each community and attracts the desired demographic of visitors to invest and sustain the local tourism industry. Clarity in the message will also engage a workforce that is attracted to the island lifestyle by:

1. Hiring and training workers to align with the brand – island culture and environmental awareness, regeneration, self-awareness
2. Appealing to new workers with a brand that resonates with their desire for meaningful sustaining work.

The region needs to build a shared community understanding of the tourism/hospitality industry and ensure housing is available for new workers. A 'locals first' sentiment resonated from business surveys and interviews, with comments including: "We have to connect to the local community first." "They forget where their economy is coming from." "We need a way to bring the islands together and not be competitors." "It has to be liveable for the people who live here." "People need to understand that we need a vibrant economy in order to have vibrant services." Based on our 2019-2020 exploration of the local industry, we learned that our visitor economy includes family/friends visiting full time residents, a large number of second home owners (very apparent in the summer and during the pandemic), visitors using paid accommodations (traditional tourists) and of course our increased workforce to meet the demands of all the extra numbers.

A local tourism workforce is sustained when it is supported by the local community. In order to create this opportunity, tourism can be better managed by marketing to visitors who share the unique values of Gulf Island residents. Thus, we learned that we must target visitors whose: (1) purchasing supports a hospitality workforce in the Southern Gulf Islands and (2) values align with the broader Southern Gulf Islands communities.

All visitors to the Gulf Islands contribute to the local economy in some way while also using local

resources. Visitors intentionally staying at local commercial accommodations (rather than camping or staying with family or friends) represent the best return on investment for the community.

METHODOLOGY

Genuine efforts to engage the local community was critically important to advancing economic improvements via the visitor economy. Residents are protective of the island spaces they live upon and can feel threatened by activity that changes their personal experience or, more importantly, impacts the fragile ecosystems of the islands. The same residents depend on local businesses that depend on the visitor economy. It's a circumstance that begs information and dialogue in order to move forward with all interests addressed.

At project onset, Southern Gulf Islands Tourism Partnership Society (SGITPS) was advised by local community leaders that there would be a lack of enthusiasm to engage in research undertaken in the midst of COVID-19 alongside the many associated impact surveys that have been delivered through 2020. However, SGITPS needed to give local businesses and young hospitality workers the opportunity to voice their perspectives. For this reason, we presented an opportunity to engage impacted and enthusiastic stakeholders in a Working Group to work with the Project Team and we also issued a public survey targeting tourism and hospitality sector employers and employees with room for public feedback.

Stakeholder Engagement

One industry-connected stakeholder from each of the five islands volunteered to form a Working Group to work with the Project Team to create a parent brand identity for the Southern Gulf Islands travel and hospitality industry. The Working Group met throughout the summer (July 8, August 5, and September 22) via Zoom with the Project Team, and finally participated in an internal workshop on December 7 and a full stakeholder workshop on December 9 to review and provide feedback on draft materials. Twenty-seven stakeholders attended the December 9th workshop to review and discuss the draft Guidelines. Attendance included local creatives, operators, Chambers of Commerce, and the SGITPS Board of Directors.

Online Survey

SGITPS created an online survey and distributed it to SGITPS members, through local Chambers of Commerce (Salt Spring, Mayne, Galiano, and Pender) and the Saturna Island Tourism Association. Paid advertisements with survey purpose explanations and survey links were included in local print and online news outlets. The survey was issued and open from mid-September until mid-November. Respondents completed the survey between September 21 and November 2.

The questions were customized to owners/managers and employees of local hospitality businesses. A third option was provided for those residents interested in the issues but who are not directly involved in the tourism and hospitality industry. The survey delivered 66 responses: 36 from owners/managers, 16 from employees, and 14 from interested residents. Notably, only about one half of the owners/managers completed all of the intended survey questions.

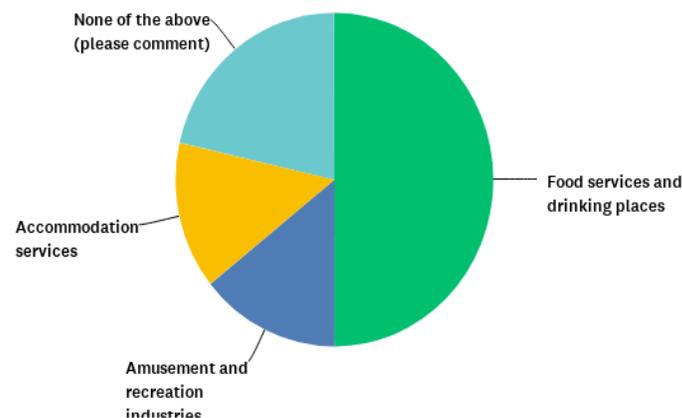
DATA AND FINDINGS

This section summarizes the survey data, and both validates assumptions and reveals directions to guide further SGITPS work in strengthening the sector through the CDMO work undertaken. Feedback from employees, employers and the public are included.

Employees

The survey targeted those employed in the tourism and hospitality sector in order to gain insight into activities within the purview of the Southern Gulf Islands Tourism Partnership. Most respondents worked in food and beverage services (50%), amusement and recreation (15%) and accommodation services (15%). Remaining responses ranged from transportation (local airline), retail (gallery), and farmers' market.

Q5 Which group best describes the sector you work in?

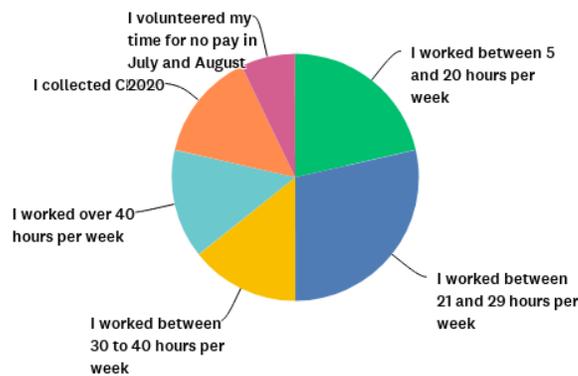


Of the employees participating in the survey, 43% were employed part-time year-round. Fourteen percent reported full-time year-round employment while 29% said they were employed full time during the summer but only part-time for the remainder of the year. One respondent had just retired, and one reported they were neither employed nor looking for work.

Ninety-three percent of employee participants identified that their motivation to work on the Southern Gulf Islands was that they lived on the islands. Others had friends who lived on the islands and found the work was a good career opportunity (14% each, respectively). One knew their employer and one reported being attracted to the 'island vibe', noting the feeling of a safe and inclusive place to be.

Only 29% of summer staff worked full time or more (30 hours per week or more). Most worked less: 29% worked 21-29 hours per week, 21% worked 5-20 hours per week. Fourteen percent of respondents collected the Canadian Emergency Response Benefit (CERB) and one person volunteered their time for no pay during July and August 2020.

Q4 Which of the following best applies to your work in July and August 2020?



The survey asked employees what would attract them to a career in hospitality or tourism in the Southern Gulf Islands. Respondents indicated that higher wages (70%) and medical/dental/pension benefits (57%) would entice them. Half desired available and low-cost housing near the job and half would like year-round employment or more hours per week. Some respondents indicated that an increased profile (14%) of, and support for (14%), the hospitality industry in the community would be encouraging. A comment emphasized the importance of the creative / arts sector as a critical role in tourism and deemed the sector to be undervalued and under-invested.

Employers / Managers

The survey targeted owners and managers of businesses benefiting from the travel economy in order to gain insight into activities within the purview of the Southern Gulf Islands Tourism Partnership. Twenty-five percent of respondents worked in food and beverage services, 12.5% in amusement and recreation and 37.5% in accommodation services. Remaining responses ranged from transportation (local airline), artists, and event planning.

Sixteen employers reported on 91 summer (July and August) staff. Half of the employees worked full

time, and more than one-quarter worked less than 20 hours per week. The balance worked between 21 - 29 hours per week. Most of the employers also reported on their planned employment for October and November 2020, with 14 less staff anticipated, was split between a decrease in full time staff and part time staff (less than 20 hours per week). Their staffing expectations for January and February 2021 showed about the same number of employees with slightly less hourly work.



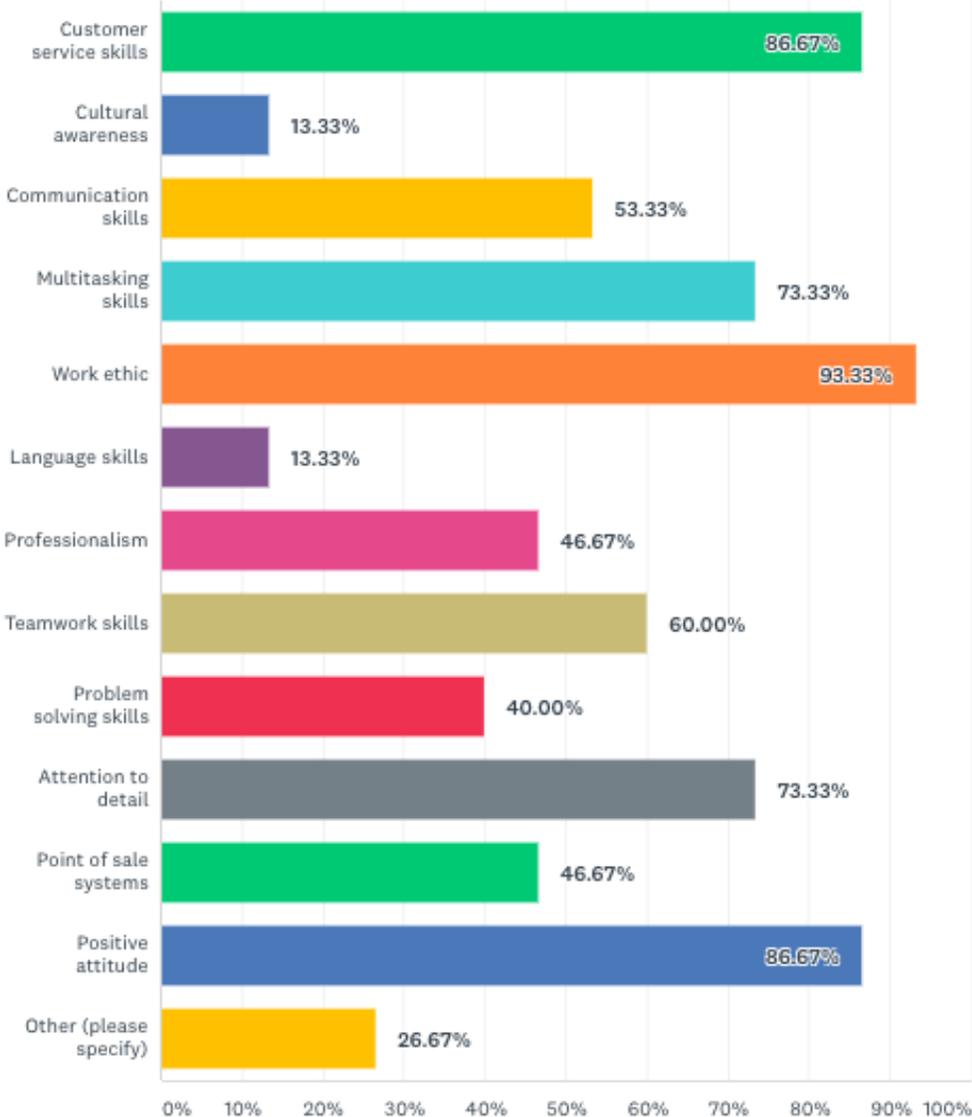
The survey asked employers about their strategies to attract and retain enough skilled staff over the next twelve months. Two-thirds of employers plan to recruit staff locally using word-of-mouth and 43% plan to offer higher wages. Almost one-third plan to promote their high standards for health and safety which is an interesting and positive tactic possibly influenced by pandemic times. One-quarter of businesses will rely on local and regional advertising. Several responded that they have no intention of hiring more staff due to anticipated ongoing market issues due to travel restrictions.

Not surprisingly, employers noted the biggest factor impacting their ability to operate into the fall season in 2020 was the lack of customers due to COVID-19. The second rated influence was simply a lack of customers ordinarily choosing not to visit the Southern Gulf Islands in the off-season. The cost of health and safety protocols were the third highest rates influenced with a note from one operator that cleaning protocols added 35% to the turnover cost. Next, respondents viewed community negative perception of tourism as a factor, followed by competition with CERB and lack of available staff.

Employers rated work ethic (93%), customer service skills (87%), and a positive attitude (87%) as the top

skills required for their business success, followed by multi-tasking (73%) and attention to detail (73%). The need for accountability was mentioned in additional comments. These responses highlight the need to hire for the ‘soft’ skills and train for any particular specific skills. This presents an opportunity for SGITPS to focus on internal communications to generate more enthusiasm and pride, locally, along with a compelling call to action for workers to understand and care about how important their contributions are to a healthy and thriving community.

Training agencies may find ways to build soft skill development into technical programs to support communities working collectively to attract a dedicated and enthusiastic workforce. Half of the employers responded that food safety and housekeeping training would support their operations. Others referenced Smart Serve, Super Host, First Aid, and professional Food and Beverage.



Community

In anticipation of general community interest in the survey, SGITPS included two general questions to catch a glimpse of the perceived impact of the visitor economy on the islands. The responses were split with about half seeing the visitor economy as an improvement to their quality of life and others believing that the visitor economy decreases their quality of life. The largest concerns were about visitors in the community during a pandemic, traffic, and lack of services to share. Several respondents recognized that tourism is actually responsible for more and diverse services. They also appreciate that family and friends have local service businesses for enjoyment and employment.

STRATEGY

The Project Team, with advice from the Working Group, created a strategy and guidebook that provides direction for the use by the CDMO and its industry partners of the Southern Gulf Island Tourism logo family, sub-brands, and industry marks. Before publishing or distributing any new marketing material, creative work should be approved by the Southern Gulf Islands Brand Manager to maintain the visual cohesiveness that represents a stronger region. The brand blueprint serves as an at-a-glance guide that lays out the overall brand strategy: who we are, where we're headed and what drives us.

Brand Model

The brand model was developed during Phase 1 and refined as part of this Phase 2. It is built upon our island personalities – free spirited, joyful, unorthodox, and accomplished. It focuses on how we live as a basis for who we wish to entice to work in our communities and visit our islands:

- We don't follow norms; we follow our hearts. We measure a life well lived, in joy, fulfillment and connection. Our safe, rural setting gives us room to roam in both imagination and place.
- Life experience meets childlike wonder. We work hard, play long, eat well and sleep like babies. We indulge in daydreams and treasure imagination.
- We reach out to each other in community, finding inspiration in our brothers and sisters from different backgrounds and experiences
- We savor simplicity and tranquility. Sometimes the greatest creative breakthroughs happen when we slow down, stop and smell the ocean.
- We seek to give more than we take, ensuring that our communities thrive and our natural environment flourishes.

Strategic Principles

Three core ideas ground the work of the Southern Gulf Island Tourism Partnership in order to position the industry locally in a way that strengthens support for local businesses and increases attractiveness of the industry to potential workers.

1. The Southern Gulf Islands identity is about lifestyle more than traditional tourism. It is about capturing the spirit of the place by focusing on our people and our workforce, sharing our way of life with like-minded future visitors, and extending our communications to get beyond cliché tourism imagery.
2. The identity is grounded in creativity and nature to celebrate creative life in all forms. We are surrounded and shaped by water and we use our talents to build a world with more beauty, harmony and abundance.
3. Southern Gulf Islands Tourism must prioritize guardianship of the land (in alignment with the preserve and protect mandate of the Islands Trust) by taking on a leadership role in regenerative tourism. We will accomplish this by helping our communities become ambassadors for the islands' visitor economy.

COMMUNICATION TOOLS

Three primary deliverables resulted from the project to support implementation of the overall strategy. Each has relevance to workforce expansion opportunities. The brand identity, visual language, and social playbook are described below. Links provided will take the reader to the actual deliverables.

Brand Identity

The brand identity is captured through a narrative telling a story that weaves together the facts and emotions that the Southern Gulf Islands evoke. It gives visitors and locals alike the reason to want to be here. To hear and read the story while viewing the brand-aligned images can be unforgettable. Brand storytelling starts conversations and invites unconditional engagement. It is the message we want to transmit to our audience, in this case, young career-seeking residents, and tourism/hospitality professionals looking for meaningful work in the industry. Businesses use brand stories to relate on a human-level, beyond a simple transaction. This approach plays well with SGITPS's desire to focus on our human resources as a part of overall community health and ability to sustain a local visitor economy.

The brand narrative will be shared with tourism and hospitality employers in the Southern Gulf Islands for them to use in recruiting staff. The narrative will also appeal to potential employees and investors who are considering the Southern Gulf Islands as a place to live and work.

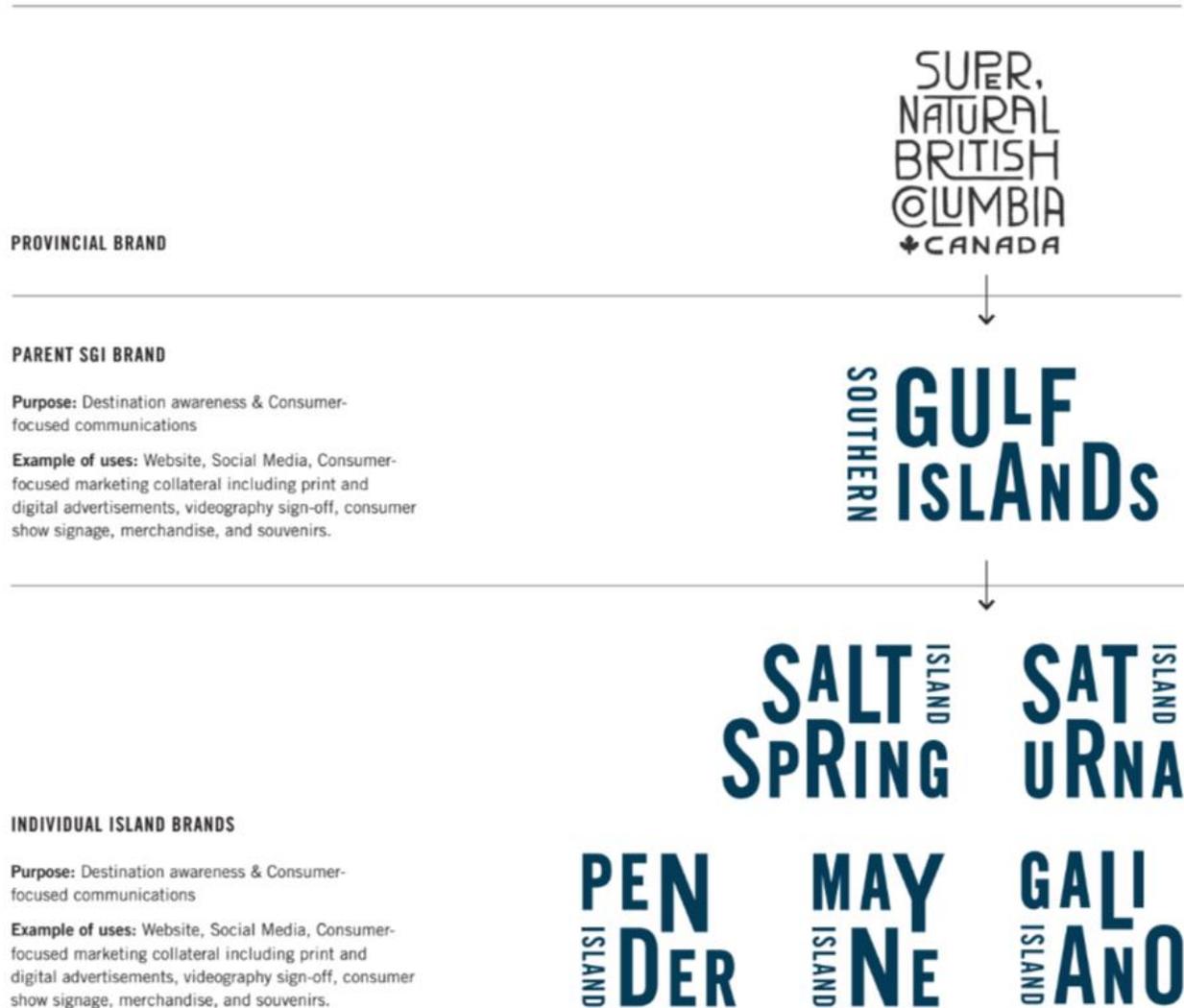
[Read, listen, and see the brand narrative here.](#) Note it has been narrated by a former Salt Spring Island high school graduate who worked with various hospitality businesses when they lived on the island.

Visual Language

The Southern Gulf Islands Partnership included other aspects of a collective identity to promote activity in the visitor economy, including workforce recruitment. The Working Group worked through the elements of a visual language that can define who we are and set us apart from other communities and travel destinations. It not only enables our unique brand to come to life but creates a strong connection

with our audiences. The project included specific typography, a colour palette, photography themes, lightroom presets, collage elements, and the family of logos.

The brand family hierarchy illustrates the relationship between the provincial brand, the parent SGITPS brand, and the individual island brands.



Collages are an important element of the brand identity and invite local creative entrepreneurs to engage in the visitor economy directly. The guidelines provide direction about how to incorporate different elements into a brand-aligned image.



[Read the detailed SGITPS Brand Guidelines here.](#)

The brand guidelines will be distributed broadly among local tourism organizations, tourism partnership members and local self-employed creatives, photographers, writers, graphic designers, technical developers. There is work available to local entrepreneurs to support businesses and travel organizations in assisting to develop brand-aligned assets to communicate and promote Southern Gulf Island tourism.

Social Playbook

Our goal is to be among the most talked about and socially envied tourism destinations in Western Canada. A Social Playbook is our strategic and creative guide that directs the creation, management and publication of content with the goal of:

- educating and engaging target segments to join our social communities

- inspiring responsible travel
- knitting deeper connections with partners and workforce
- advocating for “Why SGI”
- engaging virtual workforce opportunities outside of the tourist season

We will apply this playbook to Instagram, in particular, as well Facebook with consideration of other channels like YouTube and Twitter in the future. The document is built off the established visual language & brand identity and includes:

- strategic framework (objectives, audience, competition, approach),
- content ideation, and
- community management protocols.

Social media works for three main reasons:

- It builds community and drives engagement. It’s the perfect opportunity to build a local groundswell, as well as amplifying the diversity in our local island voices.
- Current and new visitors use social media as a trip planning tool by way of saving posts for future planning, discovering new destinations and sharing these places with their own social audience.
- Social media inspires real conversations and connections. Social is centred on storytelling. Sharing visual content is the best way to let your audience know what you’re about and build a relationship with potential future visitors and ambassadors.

[Read the complete Social Playbook here.](#)

The social playbook will be used to guide SGITPS and island ambassadors from each community to expand awareness directly from the roots of each community. Early contracts will be issued that may foster broader related employment opportunities in social media and community management as the brand is established, communities buy-in, and businesses enjoy confidence to invest in more lucrative markets year-round. Our next steps include:

- Prioritizing content for budgeting and execution
- Providing an estimate for approved original content
- Determining a launch target to align with the website
- Developing a timeline
- Launch of the Brand Identity changeover on social



IMPLEMENTATION PLAN

The following implementation plan summarizes how the new brand identity and related communication tools specific to workforce development will be rolled out to the Southern Gulf Islands communities by SGITPS. Some initiatives are ongoing extensions from Phase 1 of the project.

Initiative	2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Locals First Campaign Continued with brand roll-out								
Contract 5 community managers to act on the social playbook								
Brand narrative introduction to hospitality employers & employment agencies								
Brand guidelines workshop and roll-out to local creative contractors, businesses, entrepreneurs								
Visitor Outreach / Engagement Campaign respecting community values and ecological imperative								
Website rebranding and travel itineraries to create future bookings								
COVID-recovery Campaign (local travel)								
Health and Wellness Campaign								
Activity & Events Calendar (southerngulfislands.com)								
Southern Gulf Islands coordinated hospitality hiring campaign								
Advance digital economy engagement with local business via island ambassadors & Tourism Vancouver Island virtual workshops								
Remote Work Campaign (winter season)								

CONCLUSION

Completion of the brand identity tools provides SGITPS a tangible opportunity to respond to the sentiments expressed by local employers, workers, and residences about the visitor economy of the Southern Gulf Islands. Increased revenue and viability of local businesses will result in higher wages and longer-term employment for staff. Community-aligned branding of tourism activities will start to build trust and engagement of the local community, improving their perception of this economic activity over time. Storytelling and beautiful imagery representing the industry will nurture some of the soft skills in local workers as everyone grows to appreciate the importance of hospitality to healthy communities through a visitor economy. The project has prepared SGITPS to be in a position of affecting change that will positively impact future employment on the Southern Gulf Islands.