



WORKING IN BANFF NATIONAL PARK

RESULTS OF THE TOURISM EMPLOYEE
SURVEY

NOV 2022

GROUP
NAO

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FOREWORD

WHY THIS?

The objective of the tourism employee survey is to help core parties of the tourism sector in Banff National Park (BNP) to understand the state of working and living in Banff and Lake Louise as a tourism employee.

It is recognized that there is a global shortage of labour and increased competition for both skilled and unskilled employees within the hospitality sector, as well as in other sectors of the economy. In short: The ability to attract labour will be a crucial competitive parameter of a destination and key to a sustainable destination development in the future.

Thus, this survey will help:

- Assess how employees in the tourism industry experience working and living in Banff National Park
- Understand the work life values, motivations and personal aspirations of the workforce.
- Forward ideas and/or initiatives to strengthen BNPs workforce attraction and retention in the future.



SUMMARY

WORKING IN TOURISM IS FUN, BUT...

BNP IS A GREAT PLACE TO WORK

Overall, tourism employees in Banff National Park are happy with working in a place of magnificent nature and rich opportunity for outdoor life. They are very satisfied to be working with great colleagues in a safe environment, a small town community, yet a place with great cultural diversity. The vast majority think that working in tourism is fun (3 in 4). However, 4 in 10 employees also think tourism employees are treated unfairly. When asked, if there are jobs in tourism with desirable pay and benefits, 29% of the respondents say no. Overall, the respondents of this survey are much more likely to recommend others to come work in Banff National Park (the place) than they are to recommend others to work in tourism (the sector).

The main result of this tourism employee survey is that Banff National Park is a great place to work for the vast majority of the workforce. Still, there are serious issues that need to be addressed by individual employers, destination leaders and town decision-makers. For a competitive destination like Banff

National Park catering to a global audience, it is imperative that all parties in the visitor ecosystem come together and find collective solutions to ensuring a healthy and inclusive work-life setting.

KEY OBSERVATIONS

In this employee survey of more than 650 tourism employees in Banff National Park, the key messages from respondents can be summarized in the following observations:

- Competitive salaries are most important factor: More than half (54%) percent of the respondents indicate salary levels as the most important factor if they were to look for a new job soon. Second most important is “work-life balance” chosen by 38%, closely followed by “availability and affordability of housing” (34%). In other words, the main priorities of the tourism employees in Banff National park are: good salary, affordable living and a good work-life balance.



SUMMARY // KEY OBSERVATIONS

- **Not satisfied with pay and cost of living:** Employees are generally not satisfied with their compensation today, nor their housing situation, even though these two factors are important to them if they were to look for a new job soon. This might not be a result which is unique to BNP, but it is still an indication that the destination is underperforming on the two factors that matter the most to employees.
- **Soft matters are not hard priorities:** Interestingly, ‘the softer matters’ of a good work life do not seem to be hard priorities for the respondents. When asked to choose what is important from a long list with max three choices, factors such as a “culturally diverse environment” is only picked by 2% of the respondents. Similarly, “opportunity to learn language” by 3%, “working in a small town” by 4%, “working in a safe environment” and “good social life” by 5% respectively, and “working for a responsible company” by 8%.
- **...But soft factors score high on satisfaction:** Paradoxically, working with good colleagues, in a safe environment, in a small community, in a culturally diverse environment and working for a responsible employer, are all factors which score highest on employees job satisfaction.
- (continued) This is especially true if you report as a manager in this survey; Managers indicate consistently higher job satisfaction on all parameters.
- **High overall satisfaction & safe work environment:** Evaluating their present work situation, the vast majority of the work force report high job satisfaction. 3 in 4 say they are overall satisfied with their job (12% are not). 3 in 4 also feel respected as who they are, while 85% say they feel safe at their workplace.
- **Unfair work conditions in tourism:** While most respondents say they are generally satisfied with their job, there are also 40% of the employees who think the tourism sector is treating people unfairly. Almost 1 in 3 disagree that the sector offers desirable pay and benefits. Both opinions correlate to quality management – or lack thereof.
- **Job satisfaction in Banff National park is not evenly distributed:** The young segment and the employees with little seniority tend to be more discontent with their pay, and less likely to say that their job is meaningful.



SUMMARY // KEY OBSERVATIONS

- **Working in tourism is a sticky business:** The older you are, and the longer you have worked in the tourism sector, the longer you expect to stay in it. 68% of the 45+ year-olds say they intend to keep working in the sector for 4 years or more. Among the 18-24 year-olds, almost no one expects to be in the sector that long. Instead, 21% of the 18-24 year-olds say they expect to work in tourism for less than a year. The job function with the shortest expectancy to stay is housekeeping, while the opposite is the case with management. In total, 19% of the workforce seem to be on the move as they report to expect to be working in tourism for less than two years.
- **Generally, employees are not likely to recommend working in tourism:** When respondents were asked whether or not they would recommend working in tourism (the sector) to someone they know, the net score is rather negative. The net promoter score is -29 (on the NPS scale from -100 to 100).
- **BNP is recommended:** Interestingly, when asked if they would recommend working in Banff National Park (the place) the answer is moderately positive – an NPS score of +3 (from -100 to 100).
- **Detractors are likely men and mid-lifers:** The most unlikely to recommend working in tourism (the sector) are men, the 35-44 year-olds, while the most positive employees are the new comers.
- **Sustainability is not a top priority for tourism employees:** Only 8% chose sustainability as one of the top three important factors if they were to look for a new job anytime soon. At the same time, they are fairly satisfied with actually working in a sustainable company (3.81). A majority of about 64% believes that the tourism industry in BNP is generally responsible towards the environment. 17% disagree with this.
- **Tourism employees feel respected, but...** At the same time, many say that tourism employees are treated unfairly. While 1/3 feel they are treated fairly, approximately 40% feel that they are not. The data shows an almost linear trend: Those who feel tourism employees are treated unfairly will also not recommend working in the tourism sector. The correlating factors which might explain this are (lack of) quality management and (lack of) competitive salaries. In other words, if you believe tourism employees are treated unfairly, you are also likely to be dissatisfied with management and salary.



SUMMARY // LEARNINGS & TAKEAWAYS

- **Millennials are the most dissatisfied tourism employees:** Only 23% of the 25-34 year-olds feel they are treated fairly. The data shows that the most significant factors to this trend are affordable housing and salary. Only 9% percent are satisfied with the housing situation in BNP, even though 37% find it to be the most important factor. Finally, only 37% think that the tourism industry provides desirable pay.

WHAT'S THE MESSAGE?

Reputation crisis? Working in tourism as a sector is not highly recommended by the tourism employees in this survey – and most likely, the labor shortage throughout much of the global travel and tourism industry is an indication of the same; Work in the tourism sector is in a reputation crisis.

Some of this may be explained by the COVID pandemic. In this survey, about half of the tourism employees say that COVID has made them likely to recalibrate their work-life balance and reconsider their career path and preferences. 4 in 10 want to work more from home, and work fewer hours.

Again, this is unlikely to be unique to Banff National Park, but it might hit harder. As a destination, Banff National Park has the unique advantage of magnificent nature and outstanding recreational opportunities, but is also disadvantaged by a lack of affordable housing and the high cost of living in general.

As a mountain location, and a single-economy destination, the long-term economic sustainability in Banff National Park is dependent on the ability to attract and retain workers and talents who see attractive jobs, career opportunity, business potential and promises for a fully balanced life alongside work.

Fortunately, many of the factors that make up for work-life satisfaction are responsive to management effort and policy initiatives regarding housing, for example.



ABOUT THE SURVEY

WHAT WE DID

This report was produced by Group NAO for Banff and Lake Louise Tourism as part of the Tourism Together process towards a new 10-Year Vision for Tourism in Banff and Lake Louise.

- The survey was designed as an online survey targeting employees presently working in the tourism and hospitality sectors of Banff National Park.
- The survey consists of a set of background variables and 4 batteries of multiple statements (agree/disagree) ...including 3 open questions. There was an incentive of CAD500 by random draw to take part in the survey.
- Data was collected over 4 weeks, from July to August 2022. Invitations to take part were distributed to employees by employers associated with Banff & Lake Louise Hospitality Association and other employer networks.
- A total of 654 tourism employees presently working in Banff National Park responded to the survey with a completion rate of approximately 69%.
- All data has been analyzed and reported by Group NAO.

STATISTICAL SIGNIFICANCE

At the aggregate level, the survey is fairly robust in terms of statistical certainty. For instance, when 54% say competitive salary is important, the statistical confidence/margin of error is approximately 96%.

However, when data is broken down on background variables (e.g. gender, age groups, geography etc.) the number of observations in each cell drops significantly along with the statistical certainty. Here, results are more indicative and need to be interpreted with caution.

HOW TO READ

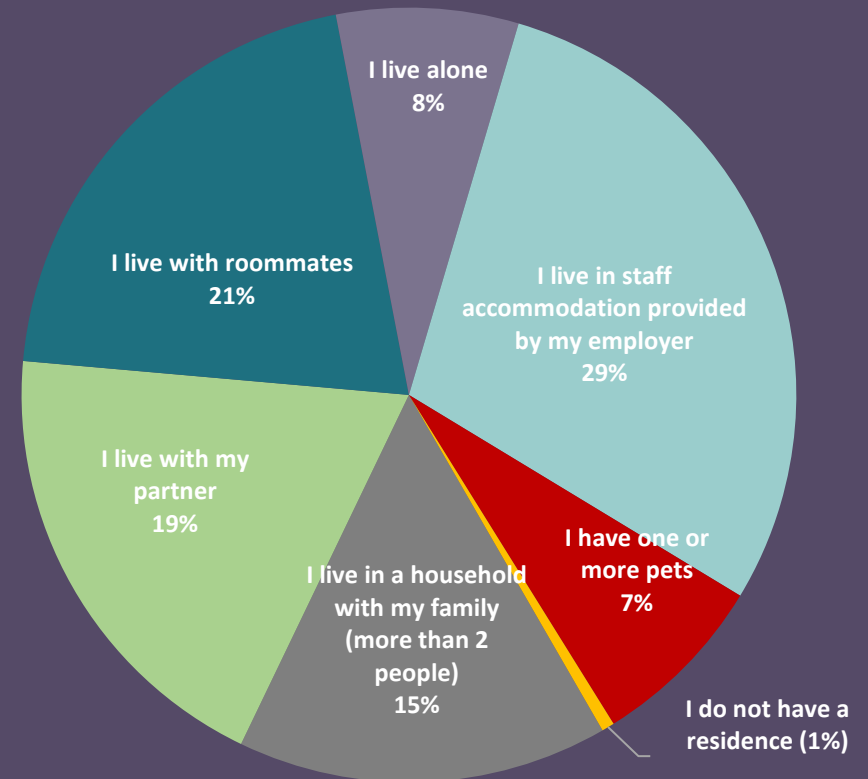
- The first section reports on the factors that are important to job satisfaction.
- The second part of the report is about general attitudes to work life in Banff National Park.
- Finally, part three focuses on the impact of COVID-19 on work life.

FINDINGS: WHO PARTICIPATED?

RESPONDENTS BY BACKGROUND

- 77% from town of Banff
- 58% Canadians
- 56% identify as women
- 93% under 55 years of age
- 35% worked for more than 10 years in the tourism sector
- 66% have completed college or more
- 17% work in management

LIVING SITUATION

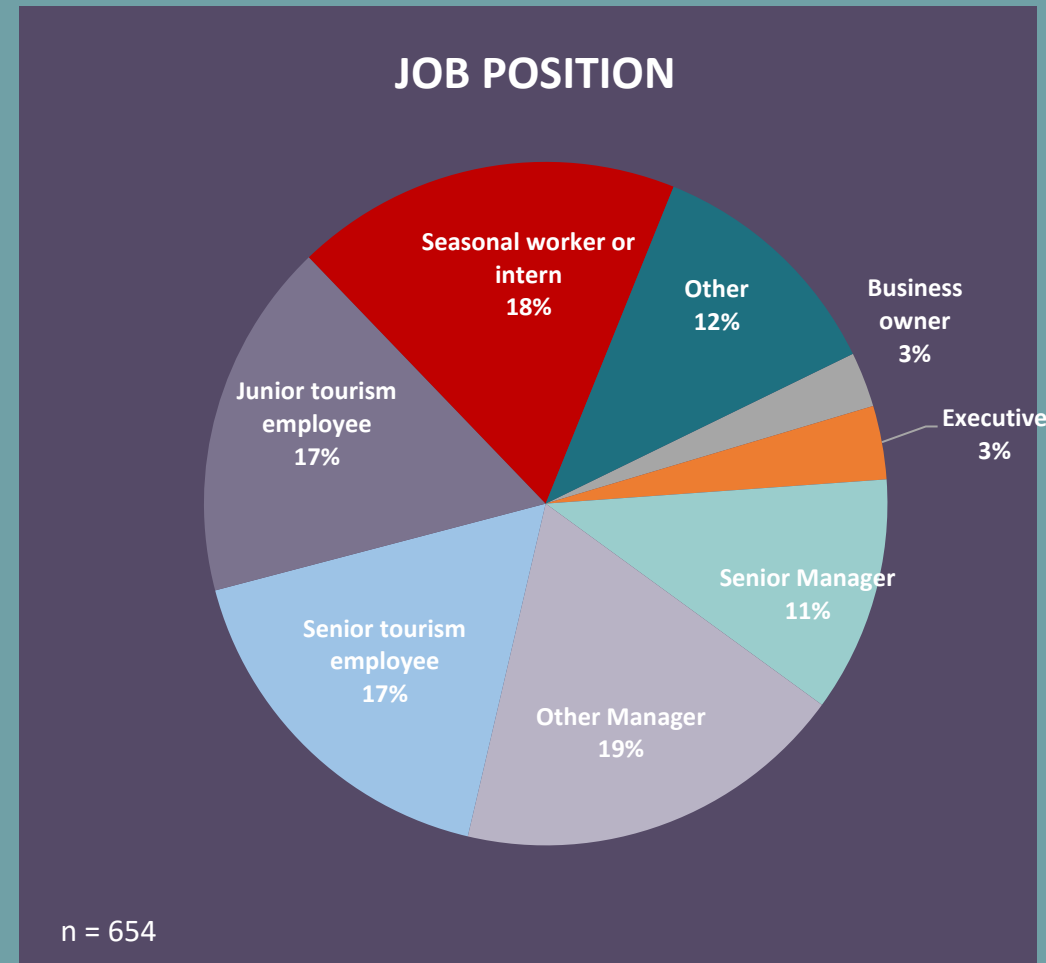
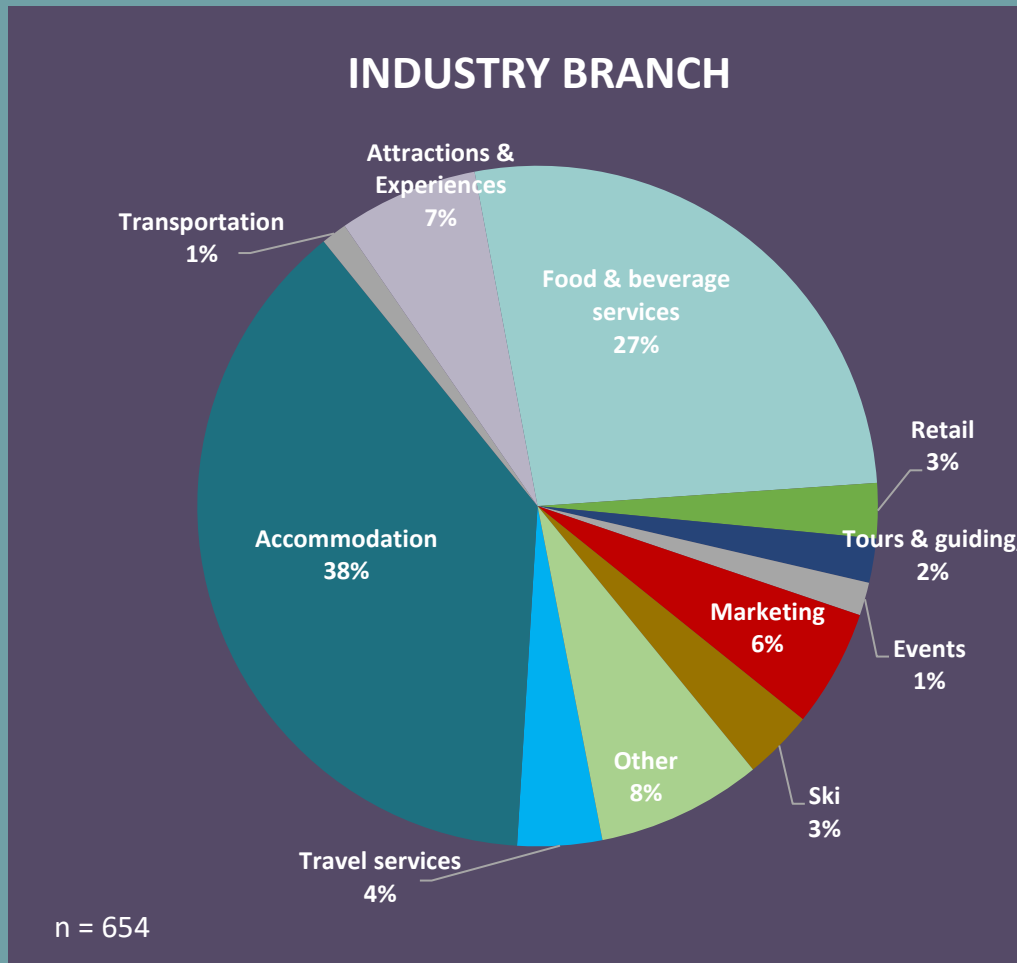


n = 654

Note: Multiple answers possible



DISTRIBUTION & JOB POSITIONS

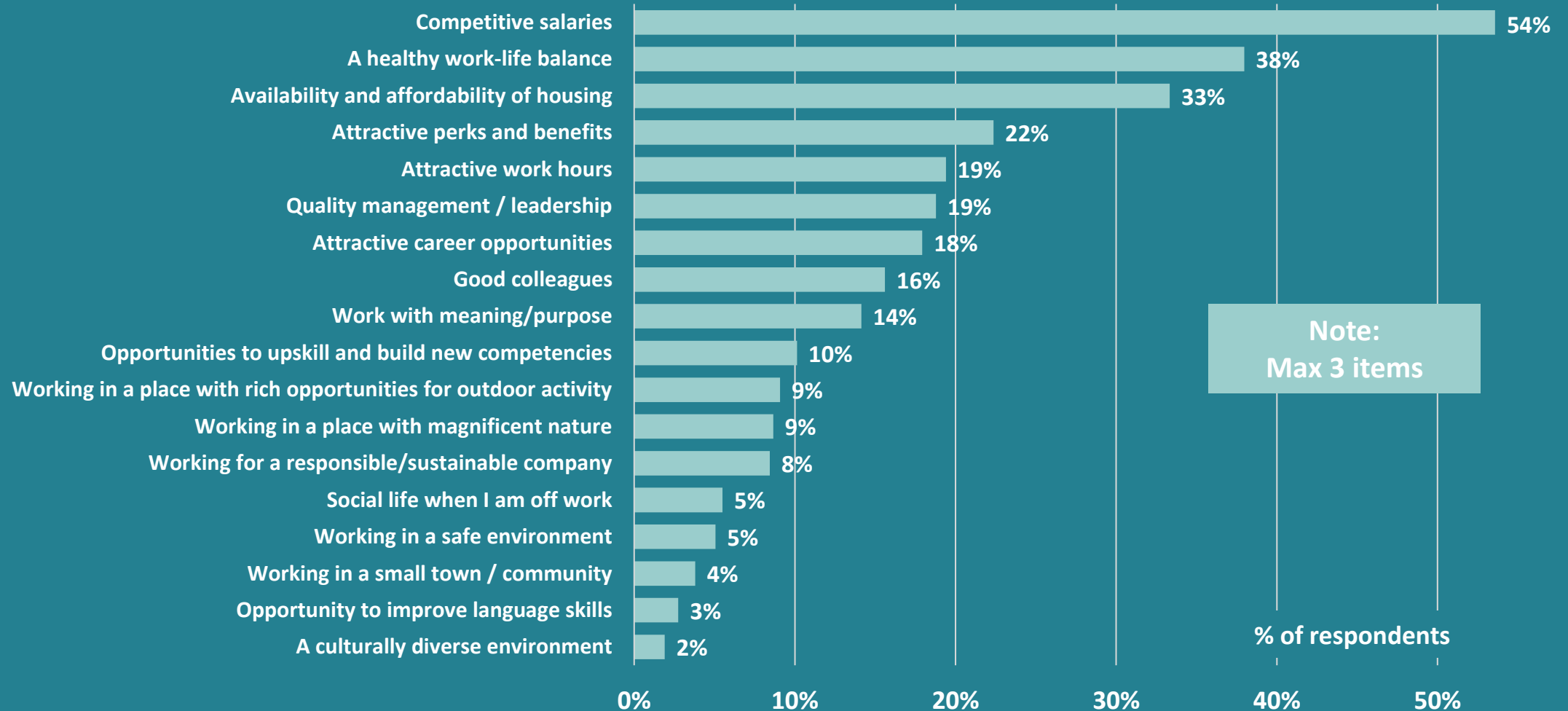


PART 1: JOB PRIORITIES & SATISFACTION IN BNP

What is important to tourism employees and how satisfied are they in their job(s)?

WHAT'S IMPORTANT IN A JOB?

What would be most important to you, if you were to look for a new job soon?



PRIORITIES CHANGE WITH LIFE SITUATION



CHANGING PRIORITIES

When asked to choose max three factors that would be important if the employee were to look for a new job tomorrow, it is evident that priorities vary according to the life situation of the respondent:

- **Work-life balance:** The older the respondent, the more importance is attached to a healthy work-life balance. The same applies for 35% of female employees (male only 26%) and the employees with the longest formal education.
- **Affordable housing:** 37% of mid-life respondents have chosen affordable housing as very important which is significantly more than other segments.
- **Attractive career opportunities** are most important for employees working for 3-5 years in tourism – typically while between 25 and 34 years old.

WHAT IS MOST IMPORTANT FOR YOU?	AGE			
	18-24	25-34	35-44	45+
IMPORTANT FACTORS				
Competitive salaries	33%	47%	52%	41%
Good colleagues	20%	13%	12%	7%
Attractive career opportunities	12%	20%	17%	5%
Availability and affordability of housing	26%	25%	37%	22%
	YEARS WORKING IN TOURISM			
IMPORTANT FACTORS	0-2 years	3-5	6-10	10+ years
Competitive salaries	42%	32%	45%	52%
Quality management	16%	8%	13%	20%
Attractive perks and benefits	16%	13%	22%	22%
Attractive career opportunities	13%	23%	13%	13%

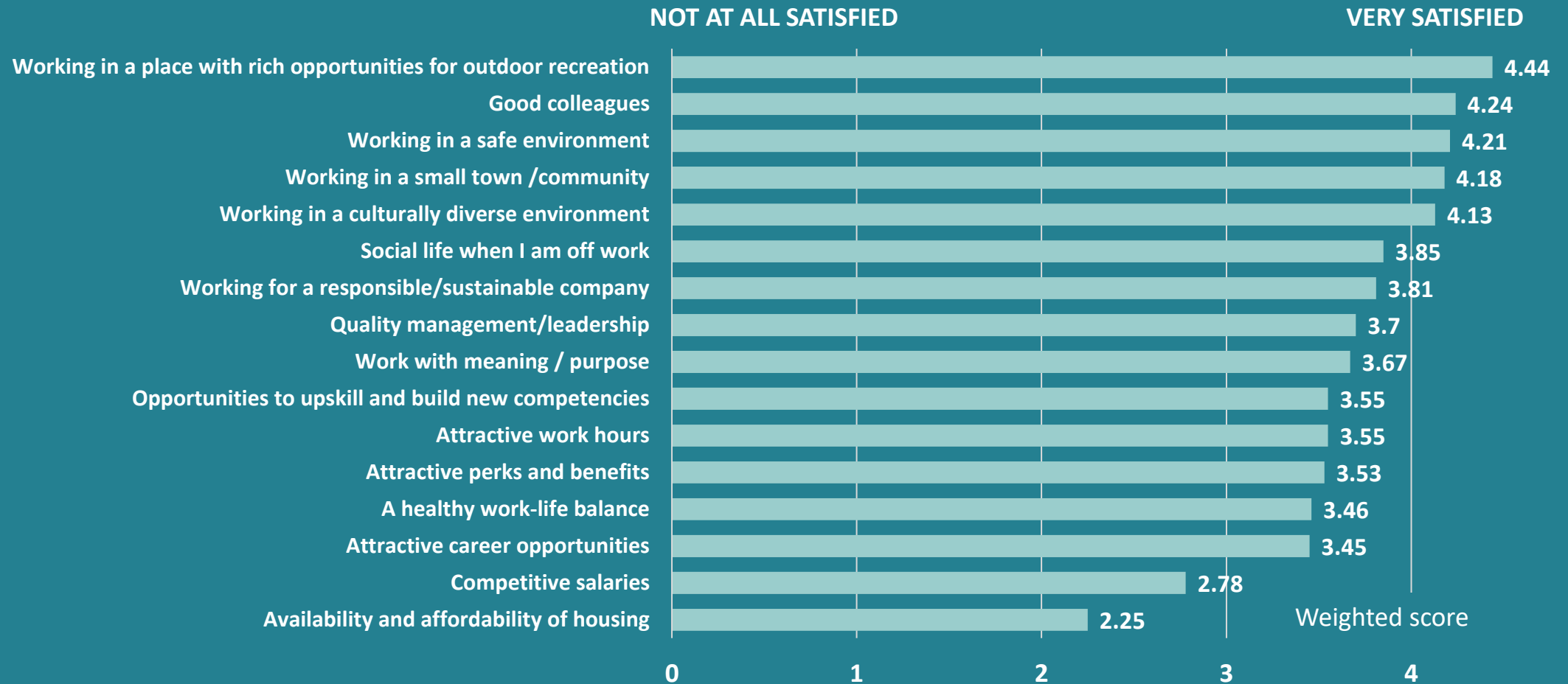
n = 474

NOTE: When broken down on segments, statistical certainty drops. Please read as indicative patterns only.

JOB SATISFACTION



How would you rate your job satisfaction working within tourism in Banff National Park?



n = 474

Respondents answered on a scale from 1-5 where 1 means "not satisfied at all," and 5 is "very satisfied"



YOUNGER GENERATIONS LEAST SATISFIED

JOB SATISFACTION IS NOT EVENLY DISTRIBUTED

Somewhat surprisingly, the youngest segment are most satisfied when it comes to availability of affordable housing (44% satisfied or very satisfied). Among the 25-44 year olds, it is only between 9% and 20%. Younger generations are also less satisfied with their salary.

- **Purpose:** Older generations are more likely to believe their work is meaningful. They are satisfied with living in a small community and the opportunity for upskilling.
- **Young people thrive with diversity:** The youngest respondents are generally more satisfied with social life and working in a culturally diverse environment.
- **No gender divides:** There are generally only few and insignificant differences between respondents that identify as either male or female when it comes to job satisfaction.
- **Newcomers** seek better career opportunities, and they are not too happy with working in a small community.

WHAT ARE YOU MOST SATISFIED WITH?	AGE			
	18-24	25-34	35-44	45+
SATISFIED WITH...				
Competitive salaries	26%	25%	35%	47%
Work for a sustainable company	57%	60%	65%	76%
Availability and affordable housing	44%	20%	9%	15%
Work with meaning/purpose	54%	54%	62%	76%
	YEARS WORKING IN TOURISM			
SATISFIED WITH...	>2	3-5	6-10	10+
Competitive salaries	25%	28%	22%	41%
Working for a sustainable company	54%	61%	61%	74%
Availability and affordable housing	34%	25%	14%	11%

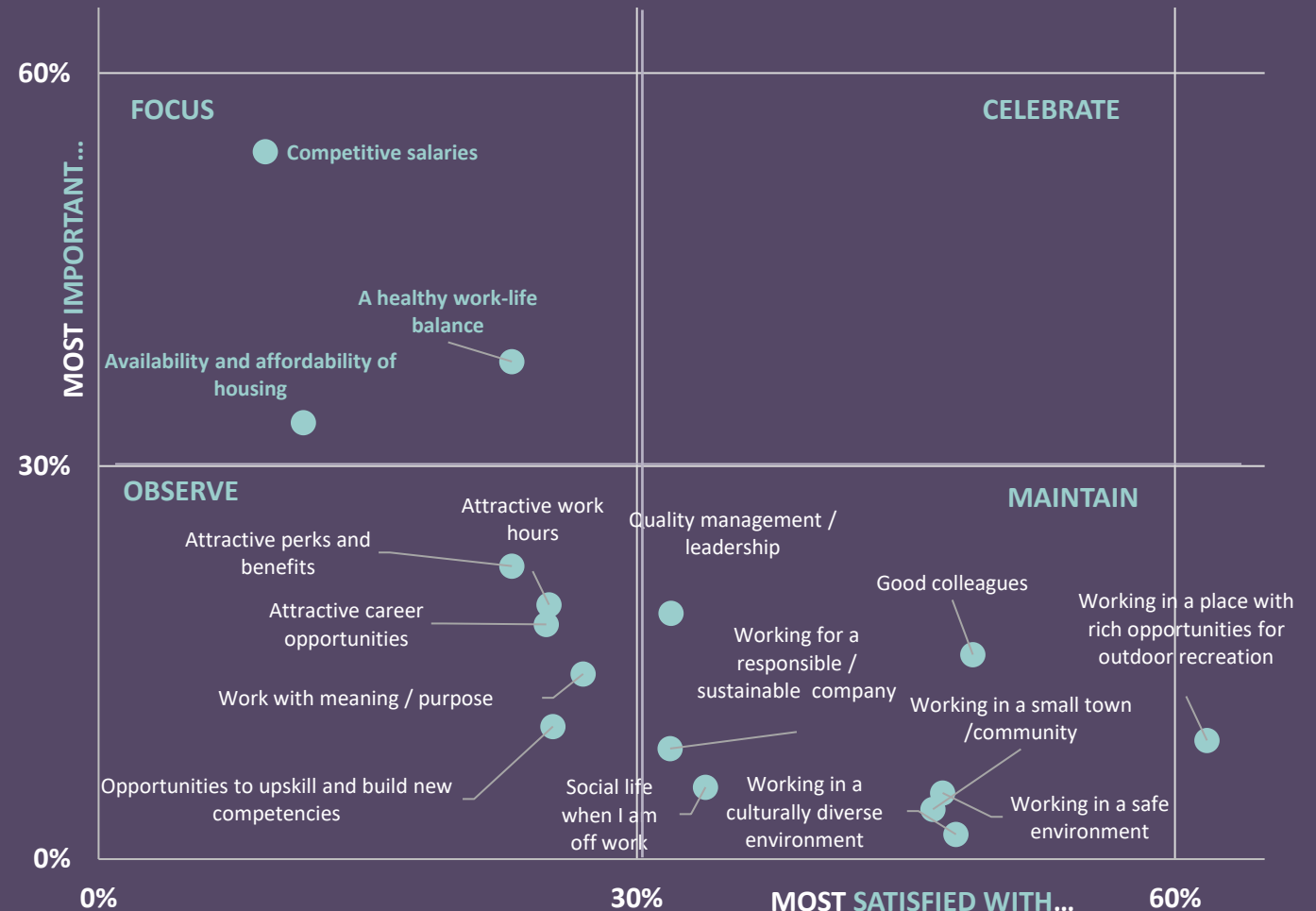
n = 474

NOTE: When broken down on segments, statistical certainty drops. Please read as indicative patterns only.

WHAT MATTERS VS SATISFACTION

“What would be most important to you, if you were to look for a new job soon?” versus “How satisfied are you in your present job with the following factors?”

- Softer matters are not hard priorities:** Interestingly, “the softer matters” of a good work life does not seem to be hard priorities for respondents. When asked to choose what is important from a long list with a maximum of three choices, factors such as “culturally diverse environment” are only picked by 2% of the respondents. Similarly, “opportunity to learn language” by 3%, “working in a small town” by 4%, “working in a safe environment” and “good social life” by 5% respectively and “working for a responsible company” by 8% (vertical axis).
- ...But soft factors score high on satisfaction:** Paradoxically, working with good colleagues, in a safe environment, in a small community, in a culturally diverse environment and working for a responsible employer – are all factors which score highest on job satisfaction (horizontal axis)



WHAT'S GOOD ABOUT WORKING IN TOURISM?

"You meet a lot of people from different parts of the world"

"A lot of tourists all year round which means the income is steady"

"There truly is no other work place that emanates this much happiness and sense of belonging"

"Sharing our love of where we live"

"The opportunity to network and explore"

"Opportunities that come with working in an iconic destination"

WHAT IS THE MOST **PROBLEMATIC** ABOUT WORKING IN TOURISM?

"Too busy. Tourists have no idea what they're doing and we really don't have the capacity to comfortably facilitate everyone who visits"

"Some attractions got too popular and the visitors get frustrated with not being able to get to certain attractions"

"Lack of environmental concern & impact of future tourism"

"Unclear vision - profitability vs conservation"

"Housing - staff accommodation and high cost of living - food is expensive"

"Overworked. We have no energy to enjoy park"

n = 474

FREQUENCY OF WORDS IN OPEN RESPONSES:
HOUSING = 91, COST = 52, WAGE = 32, PEOPLE = 32

PART 2: ATTITUDES TO WORKING IN TOURISM

What are the levels of satisfaction among tourism employees and how likely are they to recommend a job in tourism to others?

WOULD YOU RECOMMEND WORKING IN BNP?

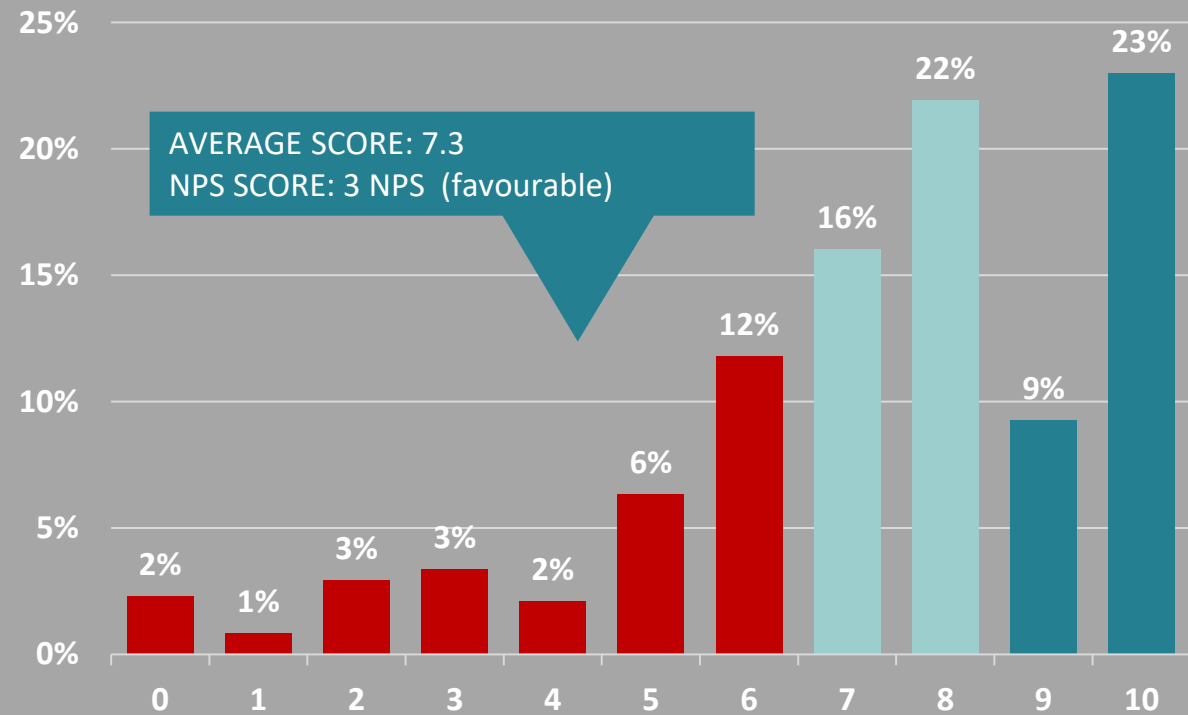


How likely are you to recommend working in Banff National Park to someone you know?

WORKING IN BNP IS RECOMMENDABLE

When measuring a net promoter score (NPS), respondents very likely to recommend (promoters) are subtracted from respondents not likely to recommend (detractors). On a scale from -100 to 100, the net promoter score for Banff is a modest 3 points which is slightly positive.

- Respondents from town of Banff are more likely to recommend than respondents living elsewhere.
- Female respondents are generally more positive and likely to recommend working in BNP than male respondents.
- Interestingly, the longer respondents have been working in tourism, the less likely they are to recommend BNP.



n = 474

Respondents weighted on a scale from 0-10, where 0 means very unlikely, and 10 is very likely

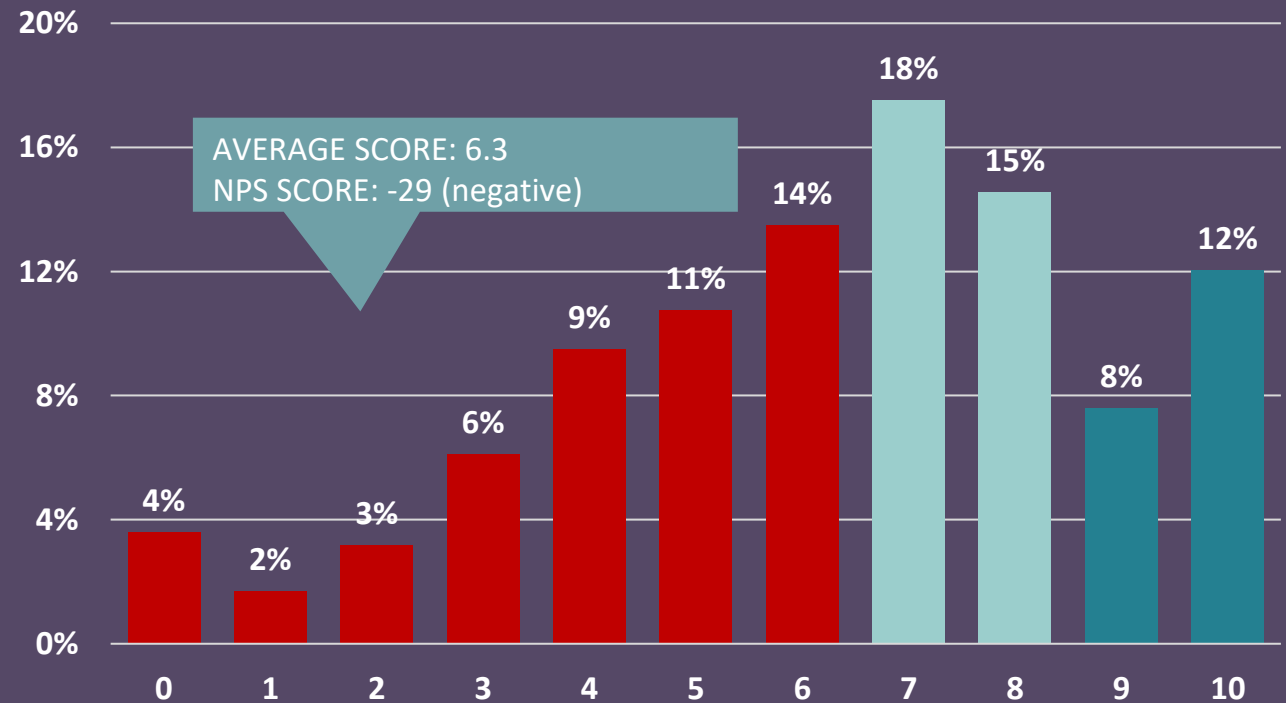
WOULD YOU RECOMMEND WORKING IN TOURISM?

How likely are you to recommend working in tourism to someone you know?

REPUTATION CRISIS

Employment in tourism as a sector is not very recommendable to the tourism employees in this survey. On the technical NPS scale from +100 to 100, working in the tourism sector scores -29. In other words, **quite a poor score.**

- The most negative respondents are 35-44 years old with an NPS at -33.
- Male respondents are negative too, as are tourism employees who have worked in tourism between 2 - 10 years.
- The most positive segment are tourism employees that are **45+ years old.**



n = 474
Respondents weighted on a scale from 0-10, where 0 means very unlikely, and 10 is very likely



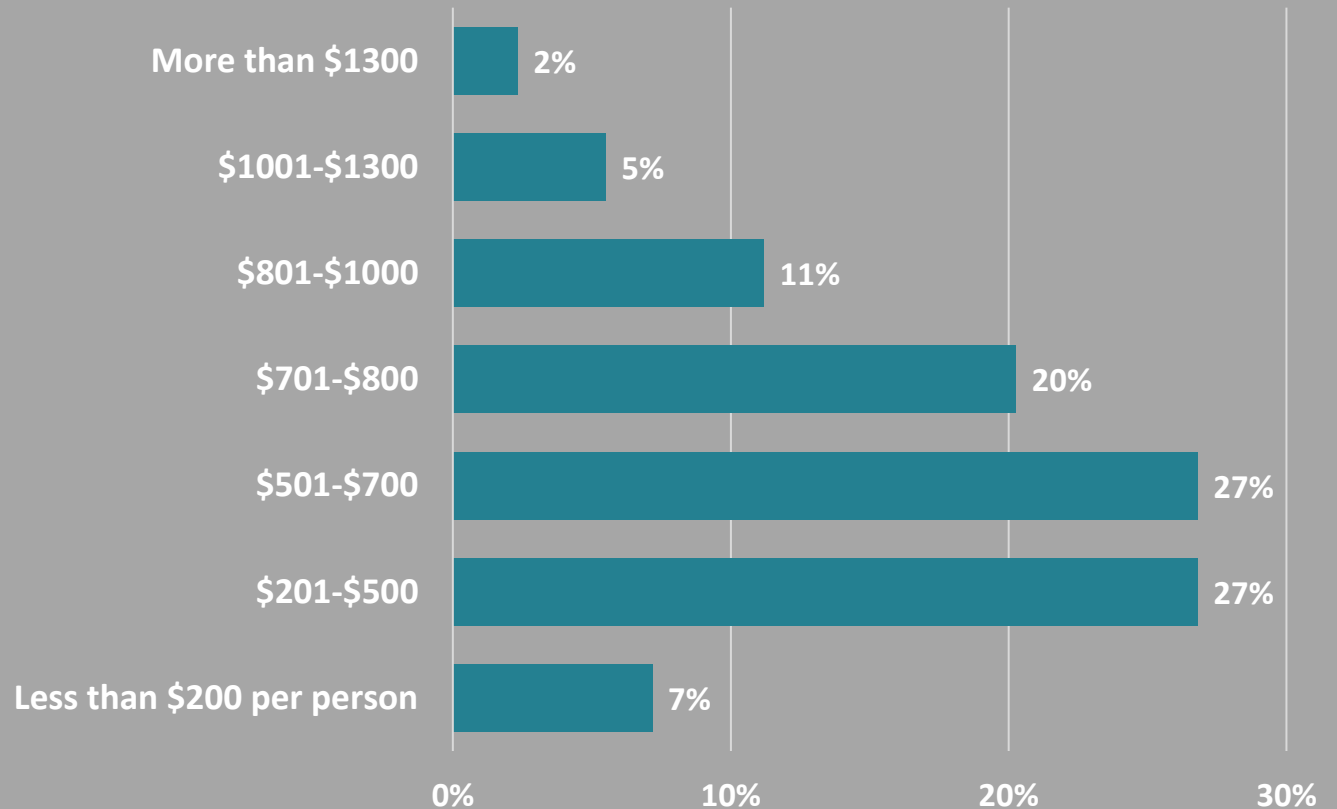
WHAT IS AFFORDABLE HOUSING?

What do you consider to be an affordable monthly cost for housing/accommodation?

BNP IS EXPENSIVE FOR THE YOUNG WORKERS

- Most respondents consider an affordable monthly rent to be less than \$700 (54%). A possible explanation for this, however, might be an over-representation of youth workers in the sample (61% of respondents in the sample are under 35).
- Tourism employees in the town of Banff tend to indicate a lower cost as affordable housing (more than 90% of the tourism employees outside of the town of Banff think affordable housing could be higher than \$500).
- The older the tourism employees, and the longer they have worked within tourism, the higher price tag on “affordable housing”. Almost 80% of the 18-24 years old consider affordable housing to be less than \$500.

Unfortunately, the data material is not sufficiently statistically solid to define monthly affordability against number of persons living in a household.



PRESENT WORK SITUATION

To what extent do you agree with the following statements about your present work situation?

OVERALL, EMPLOYEES ARE SATISFIED

- 72% of respondents in this survey say they are satisfied with their work situation. 3 in 4 feel respected as a person, and more than 80% say they feel safe both at their place of work and their accommodation.
- Importantly though, about 5-7% say they do not feel safe in their workplace nor in their living place.
- Furthermore, there seems to be a segment of 15-17% of the workforce who find their work meaningless and are unable to uphold a good work-life balance.



n = 463

Note: Does not add to 100% as neutral answers are excluded

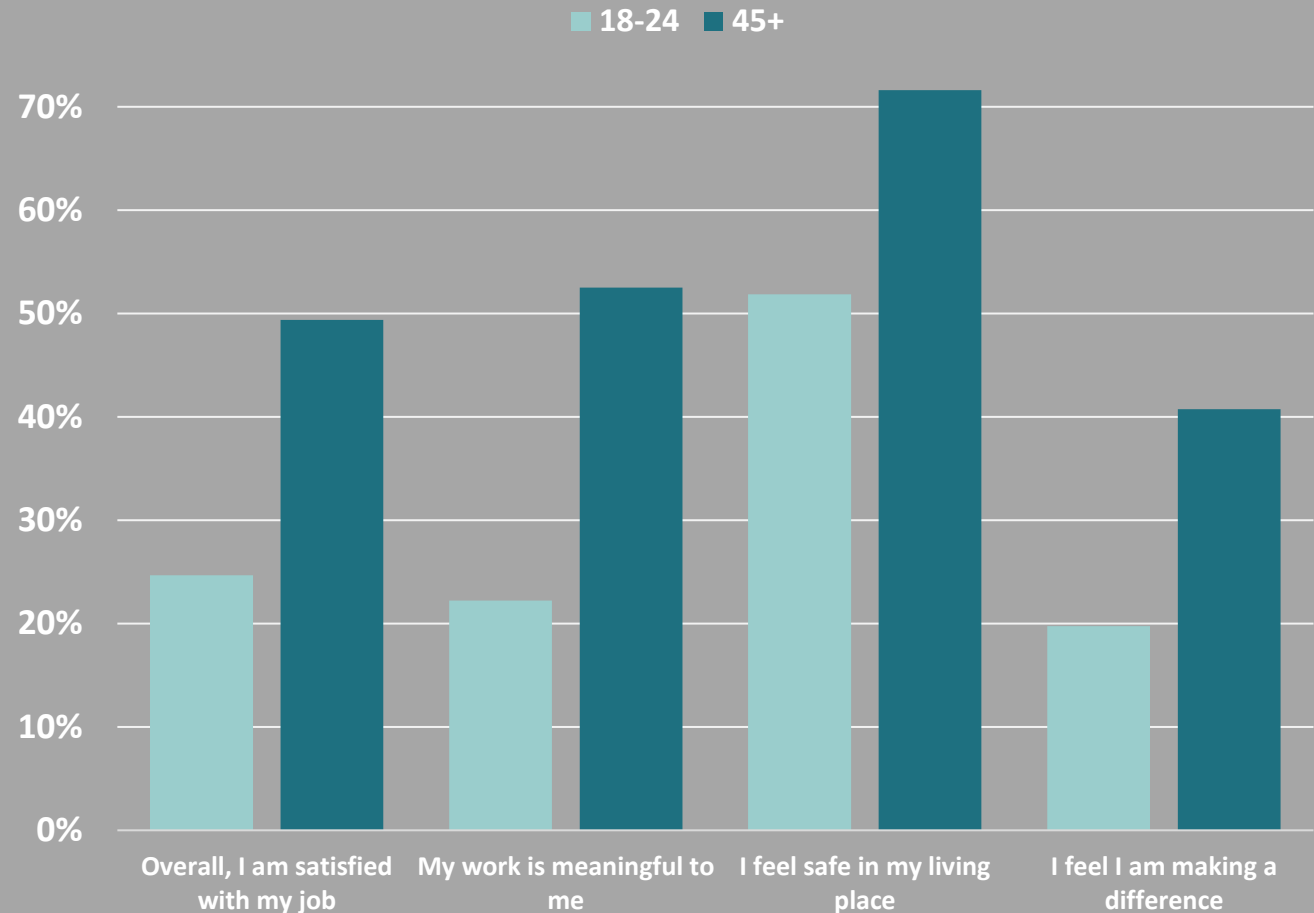
YOUNGER RESPONDENTS LESS SATISFIED



Attitudes to present work situation...

GENERATIONAL DIVIDE IN JOB SATISFACTION

- Generally, the older employees are more satisfied with their present work situation. Roughly 50% of the 45+ year-olds are satisfied and find their job meaningful, the same is only the case for a quarter (25-22%) of the young segment. See chart.
- Looking deeper into the data, the long-time employees are a lot more positive than new-comers.
- There are no significant differences in how safe tourism employees feel according to gender nor place of living. Only newcomers to BNP (less than 2 years) feel a little less safe in their workplace than the total sample.

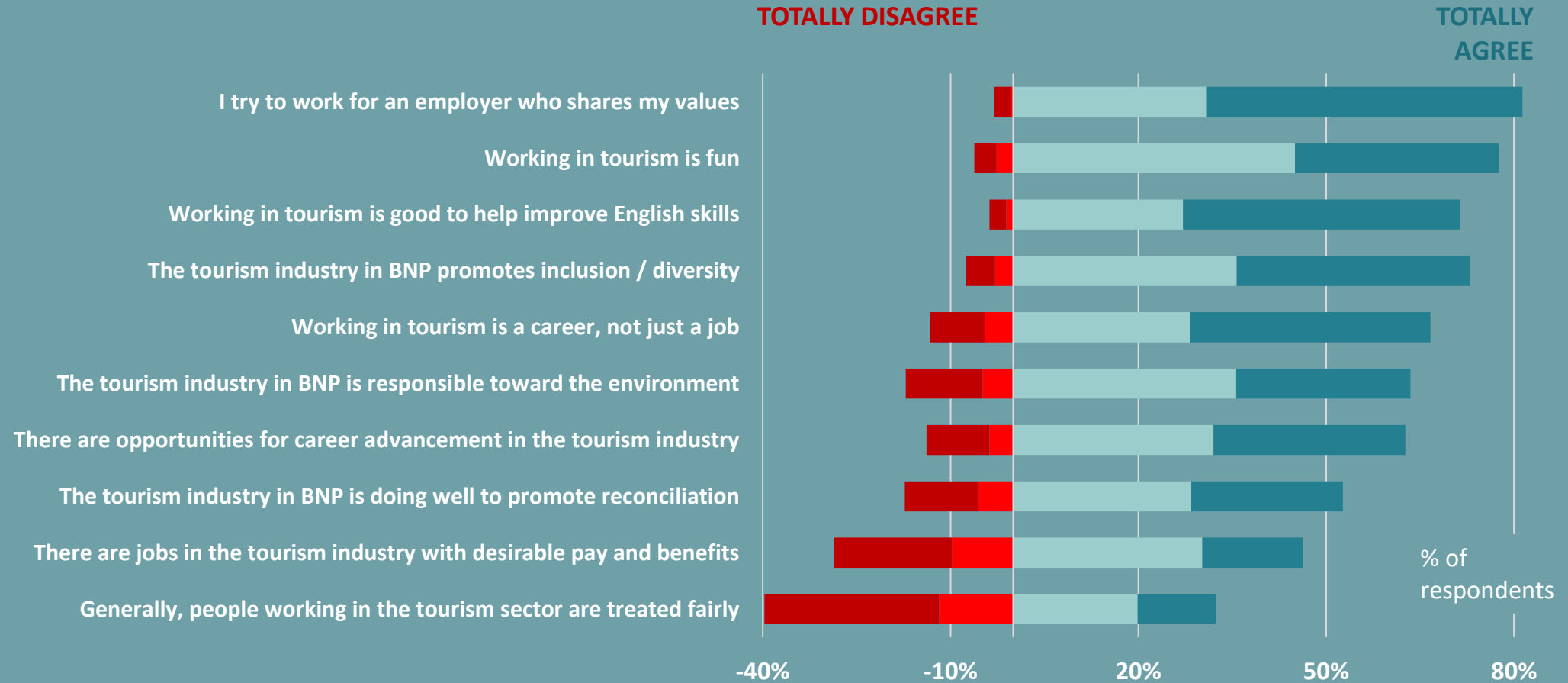


n = 463

WORK LIFE VALUES



To what extent do you *agree* with the following statements about working in the tourism sector?



n = 451

Note: Does not add to 100% as neutral answers are excluded



THE IMPORTANCE OF GOOD MANAGEMENT

What might explain that respondents report unfair treatment of tourism workers?

MY BOSS AND MY PAYCHECK...

- Overall, almost 4 in 10 tourism employees (somewhat or totally) disagree that employees are treated fairly in the tourism industry. Among the 25-34 year-olds it amounts to 51%.
- Looking deeper into the data, there are big differences in satisfaction between employees that feel workers are treated fairly and unfairly.
- Employees that believe workers are treated unfairly are much more likely to be unsatisfied with their own salary (60%) and with the quality of management (72%). 47% also feel unsatisfied with the availability of affordable housing.

FAIR TREATMENT VS. SATISFACTION



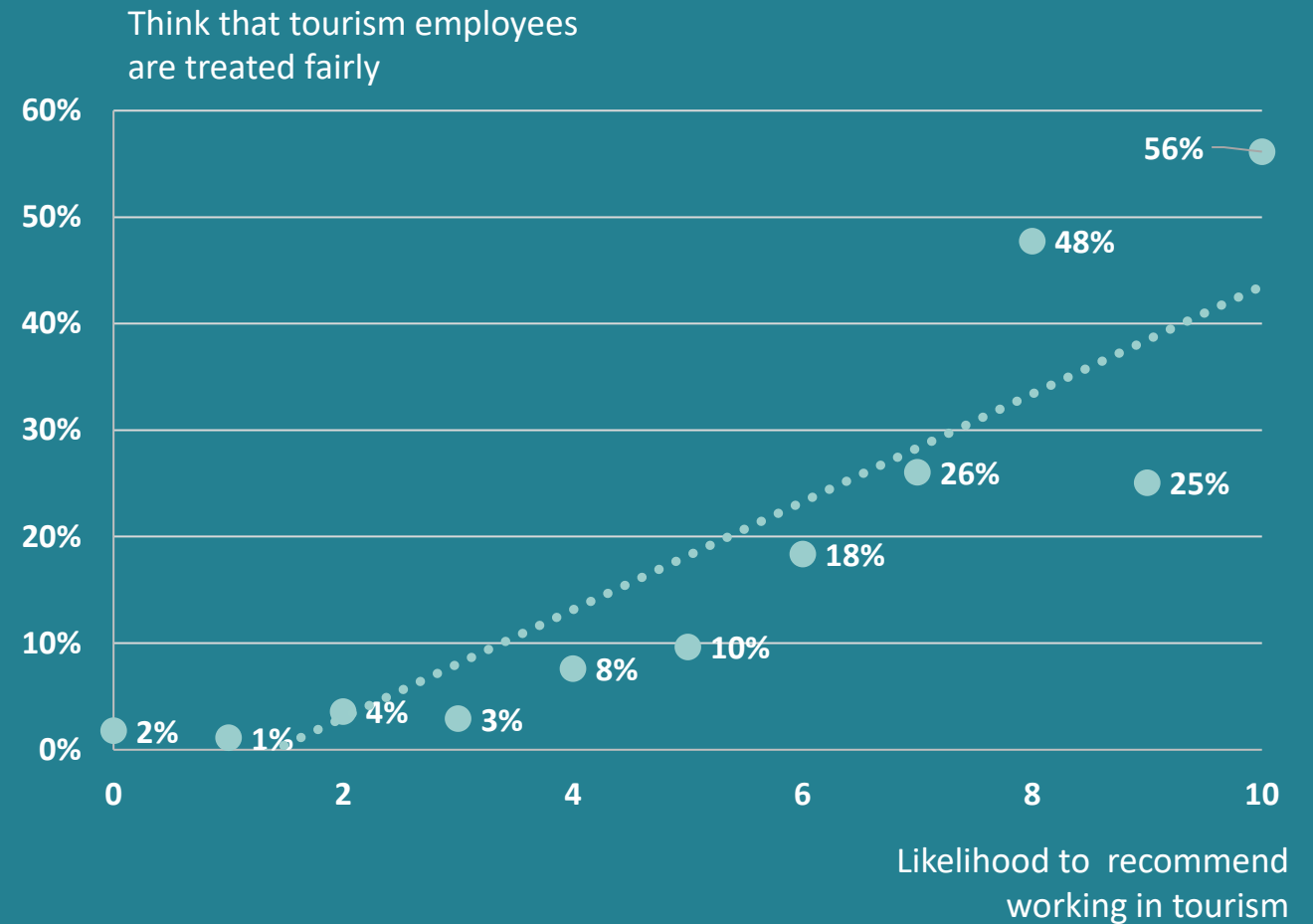
n = 451

FAIR TREATMENT VS RECOMMENDATION

FAIR TREATMENT = GOOD REPUTATION

Unsurprisingly, there is a clear correlation between the perception of fairness/unfairness and how likely employees are to recommend working in the tourism sector.

This chart shows that among those most likely to recommend working in tourism (horizontal axis to the right) more than half think that employees in the tourism sector are treated fairly (56%)



n = 451

Note: The data includes all respondents who answered they are treated fairly.

MILLENIALS ARE MORE CRITICAL

WORK CONDITIONS AND CAREER

Focusing on general view of work conditions and values in the tourism industry, millennial respondents (aged 25-34) seem most critical (marked with red in the table). Looking deeper into the data:

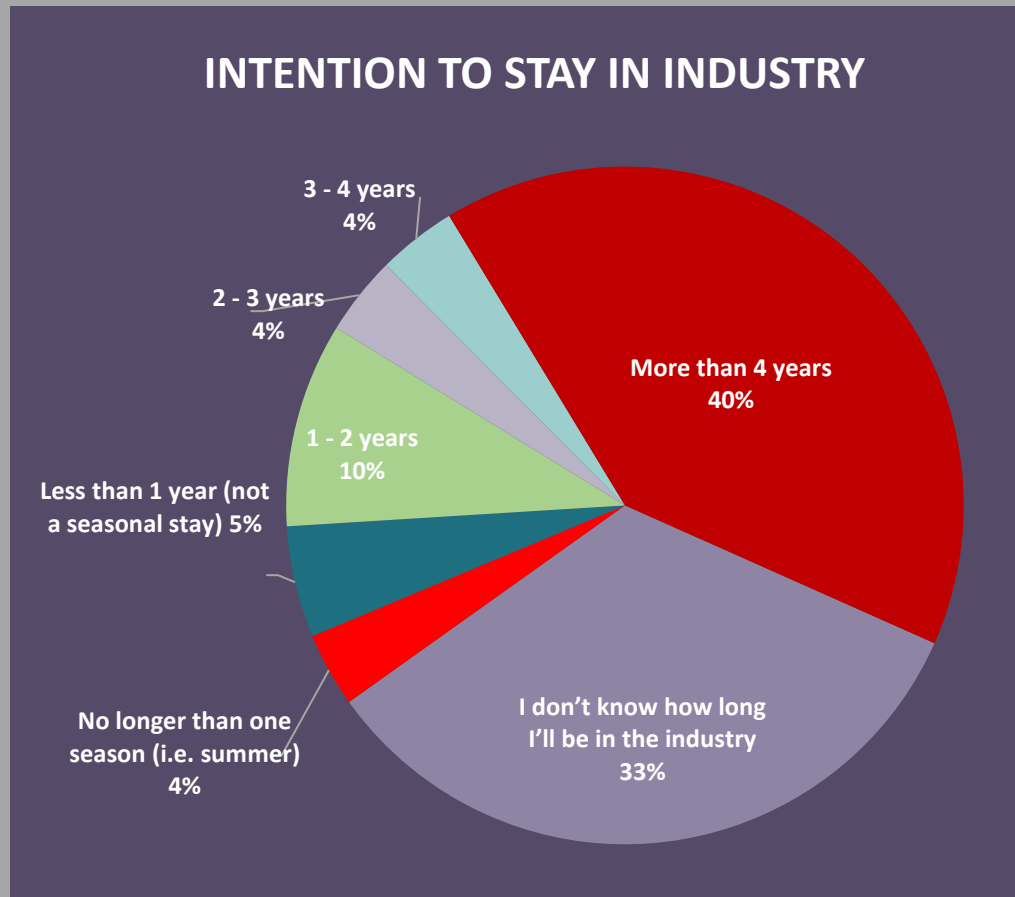
- Tourism employees in town of Banff are more positive about working within tourism, but the employees from elsewhere perceive it more as a career and not just a job.
- Generally, female-identifying employees agree more with the listed statements.
- The longer the employees have worked within the tourism sector, the more they perceive it as a career and not just a job.

Agreeing to the statement that...	AGE			
	18-24	25-34	35-44	45+
Working in tourism is a career, not just a job	56%	62%	67%	89%
Generally, people working in the tourism sector are treated fairly	36%	23%	37%	48%
Generally, the tourism industry in Banff National Park is doing well to promote truth and reconciliation	62%	47%	56%	54%
There are jobs in the tourism industry with desirable pay and benefits	57%	37%	48%	58%

n = 451

19% ON THE MOVE

How long do you intend to stay in the tourism industry?



The older you are, and the more seniority you have, the longer your time horizon to stay within the tourism sector. The job functions with the shortest expectancy to stay is housekeeping, while the opposite is the case with management as a job function. In total, 19% of the workforce seem on the move as they report they expect to be working in tourism for less than two years.

AGE	INTEND TO STAY				
	Less than one year	1-2 years	2-3 years	3-4 years	More than 4 years
18-24	21%	21%	12%	3%	14%
25-34	10%	10%	3%	3%	35%
35-44	3%	4%	1%	1%	50%
45+	0%	5%	1%	11%	68%

n = 451

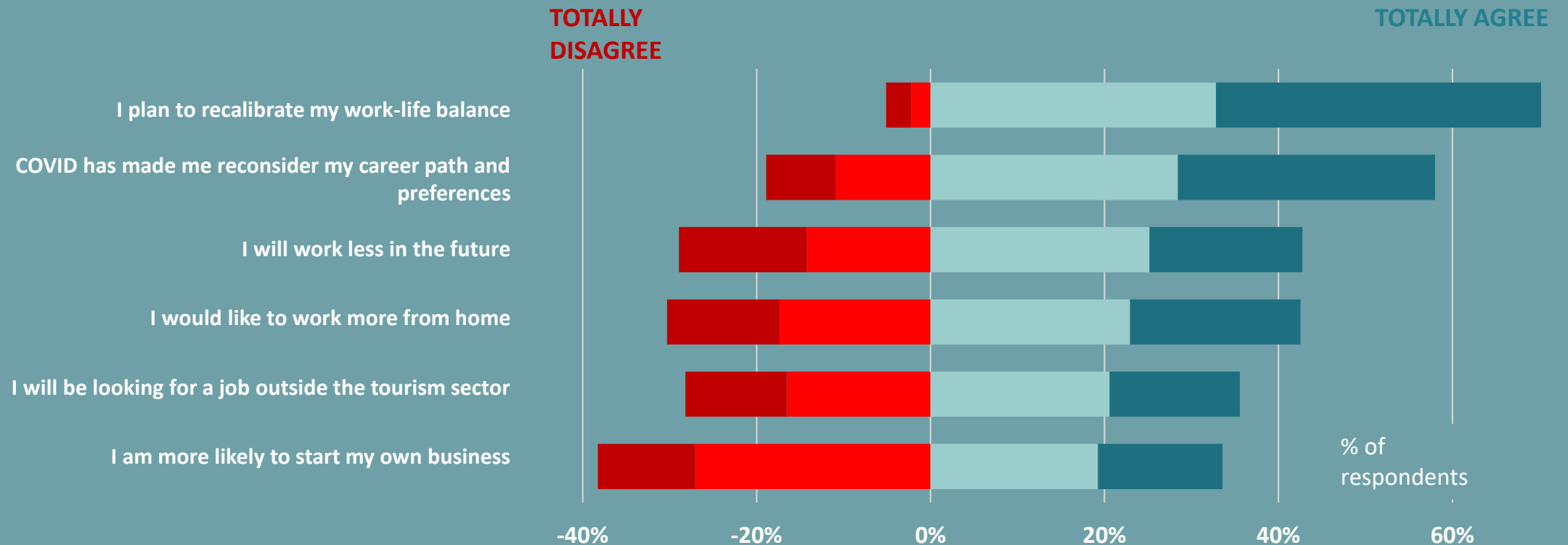
PART 3: IMPACT OF COVID-19 ON WORK LIFE

*How has the pandemic made tourism employees
rethink their work life?*

THE IMPACT OF COVID-19

How has the pandemic impacted the way you think about your work life?

The COVID pandemic has made many tourism employees re-evaluate their work life. In this survey, about half of the respondents say that COVID has made them likely to recalibrate their work-life balance and reconsider their career path and preferences. 4 in 10 want to work more from home, and also work less hours.



n = 451

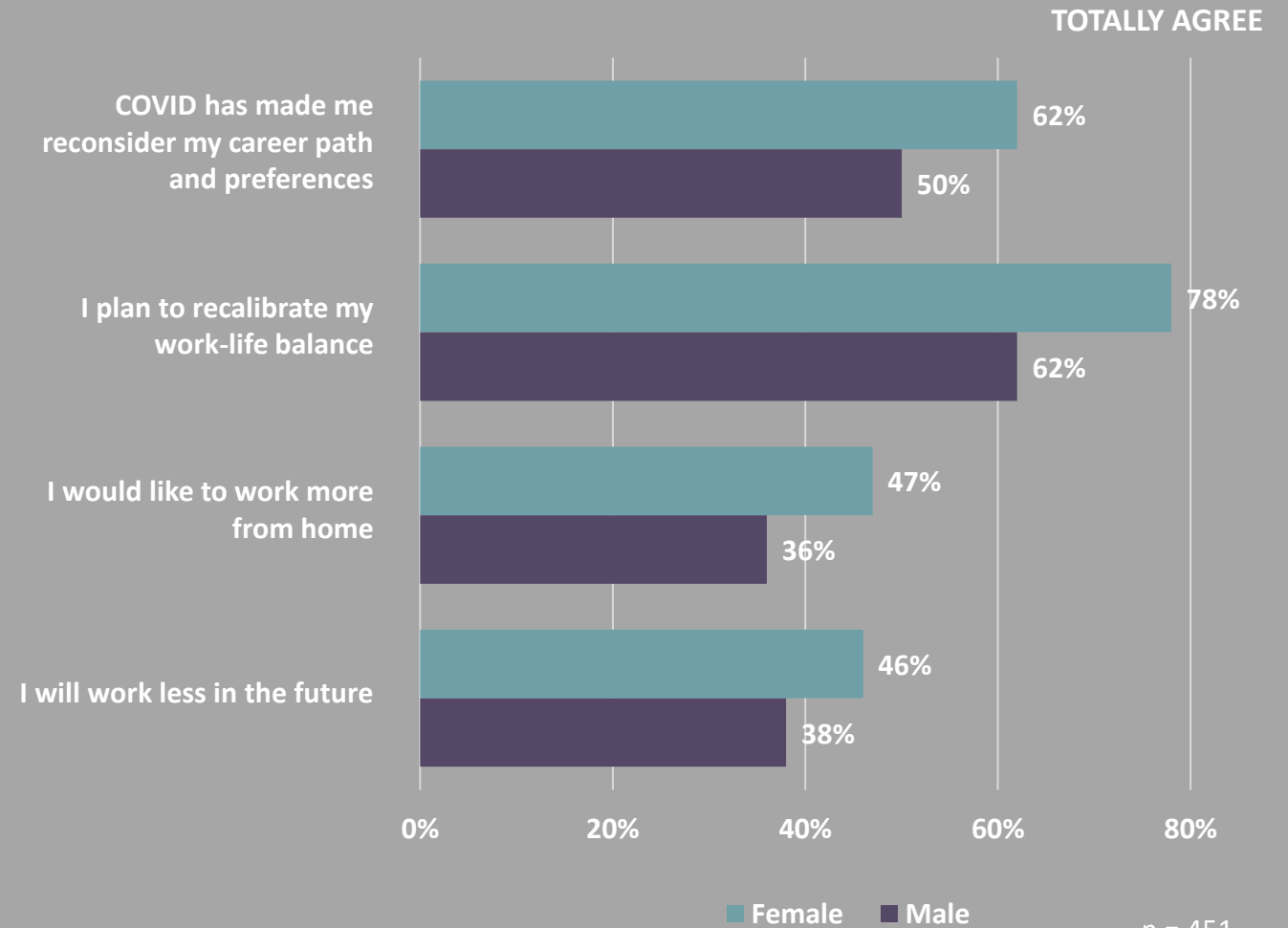
Note: Does not add to 100% as neutral answers are excluded

THE IMPACT OF COVID-19



RETHINKING WORK LIFE

- Tourism employees from other places than town of Banff tend to be more affected by COVID (22% more want to work more from home in the future).
- Employees with a university degree or higher are more likely to be planning to recalibrate their work-life balance and change career paths.
- On all statements, women are more likely to be re-evaluating their work life after COVID.



n = 451



Visit tourismtogether.com for more findings and results of the Tourism Together process

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