



2025 **TIAA**
YEAR IN REVIEW



“There are some places where the earth speaks so loudly that you can't hear yourself think. In other places nature speaks so softly that its whispers still float through the air... Alberta is one of those places.”

~ Jess Wandering

TABLE OF CONTENTS

2025 YEAR IN REVIEW

PRESIDENT & CEO MESSAGE

03

2025 AT A GLANCE

2025 WAS DEFINED BY STRATEGIC FOCUS & PURPOSE

04

STRATEGIC GROWTH

FROM GROWTH TO COMPETITIVENESS

05

POLICY & ADVOCACY OUTCOMES

WHAT SHIFTED

06

NATIONAL LEADERSHIP

CHANGING THE FORUM

07

ENABLING GROWTH

MARKETING, INVESTMENT, & THE LEVY

08

CONVENING POWER:

ALIGNING THE INDUSTRY

09

KPI

SNAPSHOT

10

CELEBRATING RESILIENCE:

THE GRIT AWARDS

11

2025 Year in Review

POSITIONING TOURISM AS ECONOMIC INFRASTRUCTURE

PRESIDENT & CEO MESSAGE

2025 marked a turning point for Alberta's tourism industry: not because conditions were easy, but because the conversation finally shifted.

Tourism entered the year navigating persistent labour constraints, trade uncertainty, transportation pressures, and rising expectations around economic diversification. At the same time, Alberta's ambition to grow tourism into a \$25-billion annual industry moved decisively from aspiration to expectation.

Against this backdrop, TIAA's role was not to advocate louder, but to advocate more strategically.

Throughout the year, we focused on repositioning tourism as a strategic economic system — one that supports export growth, regional development, workforce participation, Indigenous economic opportunity, and private-sector investment. That required engaging far beyond traditional tourism files and ensuring tourism was present in conversations typically reserved for trade, finance, labour, and economic development.

That work culminated in one of the most consequential outcomes of the year: TIAA's role in helping catalyze a Senate Inquiry into Tourism as a Nation-Building Industry, led by Senator Karen Sorensen. This initiative will sustain a year-long national examination of tourism's contribution to GDP, exports, workforce development, and regional resilience — directly aligned with the federal government's ambition to significantly expand trade beyond the United States.

At the provincial level, we continued to press for alignment between policy intent and execution: particularly around the Alberta Tourism Levy. Travel Alberta's results demonstrate what effective, sustained destination marketing delivers: tourism spending in Alberta grew four times faster than the national average, increasing from \$12.7 billion in 2023 to \$14.4 billion in 2024. Our position has been consistent: when levy revenues are fully reinvested into destination marketing, the returns are measurable, scalable, and widely distributed.

This report reflects a year of focused leadership - not activity for activity's sake, but deliberate work aimed at changing the conditions under which our industry competes and grows.

Darren Reeder
President & CEO



2025 WAS DEFINED BY STRATEGIC FOCUS & PURPOSE

What we focused on:

- Conducting a performance review of Alberta's tourism sector, providing timely insights on the sector's economic health and competitiveness aligned with TIAA's annual *State of the Industry Report*.
- Positioning tourism as a growth-oriented, export development sector through the research paper *Reimagining Tourism in Alberta: A Strategic Export Commodity, Driver of Economic Growth and Trade Diversification*.
- Recognizing air connectivity as critical economic infrastructure that enables interprovincial trade, business travel, and tourism flows.
- Enabling the All-Season Resorts legislative and regulatory framework to ensure private capital and destination investment can flow with certainty.
- Publishing the TIAA-led research paper *Reimagining Alberta's Compensation Culture*, exploring workforce development as an investment—rather than an expense—and informing employers on approaches that strengthen attraction, retention, productivity, and topline revenue.
- Treating destination funding as growth-enabling infrastructure.
- Launching *Ask Kate*, TIAA's tourism-specific HR chatbot advisor, providing practical, Alberta-based HR guidance to tourism businesses of any size.

Where we engaged:

- Provincial ministers, deputies, Treasury Board, and central agencies
- Federal ministers, MPs, senators, and senior officials
- Airlines, airports, and national transportation partners
- Official Opposition shadow ministers, building awareness and alignment on tourism's economic contribution
- National tourism, trade, and airline partners

HOW WE LED:

- Delivered evidence-based policy submissions
- Conducted national-scale economic and trade analysis
- Convened decision-makers, not just stakeholders

Strategic Context:

FROM GROWTH TO COMPETITIVENESS

BY 2025, SECTOR RECOVERY WAS NO LONGER THE CENTRAL CHALLENGE; GROWTH WAS.

But growth brought new constraints: labour availability, housing supply, air access, infrastructure capacity, capital costs, and regulatory complexity. Tourism increasingly sat at the intersection of multiple policy systems — trade, immigration, transportation, land use, and finance.

At the same time, governments were under growing pressure to diversify trade, strengthen domestic economic linkages, and reduce reliance on the U.S. market. Tourism intersects directly with these objectives — enabling trade relationships, supporting business travel, and strengthening economic ties between regions.

TIAA's work focused on connecting these systems, ensuring tourism was understood not as an outcome of growth, but as an enabler of it, within Alberta and across Canada.



Policy & Advocacy Outcomes: WHAT SHIFTED

TOURISM RECOGNIZED AS ECONOMIC DEVELOPMENT

Through its 2026–27 Provincial Pre-Budget Submission and sustained engagement with senior officials, TIAA positioned tourism clearly as:

- A \$14.4-billion visitor economy
- Generating \$13.6 billion in GDP and \$2.8 billion in tax revenues
- Supporting more than 250,000 jobs across the province

More importantly, tourism was framed alongside other growth sectors — not as a cost center, but as a high-return economic investment capable of delivering geographically distributed benefits.



TOURISM AS AN EXPORT-ENABLING INDUSTRY

TIAA advanced a deliberate narrative positioning tourism as one of Alberta's most valuable export industries by value — exceeding cattle, wheat, and wood — while being far less exposed to single-market risk.

This framing aligned directly with federal priorities to expand trade beyond the U.S. and reinforced tourism's role as a gateway to trade, investment, and long-term market development.

National Leadership:

CHANGING THE FORUM

The most significant structural outcome of 2025 was TIAA's role in helping catalyze a Senate Inquiry into Tourism as a Nation-Building Industry.

Senate inquiries are rare — and influential. They:

- Sustain attention beyond election cycles
- Create formal, evidence-based national dialogue
- Shape long-term policy, funding, and legislative direction

For tourism, this Inquiry establishes a platform to examine export growth, workforce participation, Indigenous economic opportunity, and regional resilience — elevating tourism into the core of Canada's long-term economic discussion.



Enabling Growth:

MARKETING, INVESTMENT, & THE LEVY

A central focus throughout 2025 was ensuring that tools designed to grow tourism were allowed to perform.

Chief among these is the Alberta Tourism Levy.

Travel Alberta's performance makes the return on investment clear. With sustained marketing investment:

- Tourism spending grew four times faster than the national average
- Total visitor spending increased more than 12%, from \$12.7 billion in 2023 to \$14.4 billion in 2024
- Growth was geographically distributed across urban and rural regions

TIAA continued to advocate for the levy to be fully invested back into Travel Alberta, consistent with its original intent and proven effectiveness.



Convening Power:

ALIGNING THE INDUSTRY

In 2025, TIAA's convening role focused on alignment rather than amplification.

At the federal level, TIAA created structured opportunities for Alberta tourism leaders to engage directly with decision-makers shaping trade, transportation, labour, and economic policy, ensuring tourism was discussed within broader economic frameworks, not in isolation.

Provincially, TIAA used its convening platforms to bring together industry, senior officials, and elected leaders for candid, policy-relevant dialogue. These forums surfaced regional realities, tested policy assumptions, and reinforced shared priorities around growth, competitiveness, and investment readiness.

The introduction of the Alberta GRIT Awards added a new dimension to this work, publicly recognizing individuals and organizations making material contributions to achieving Alberta's \$25-billion tourism growth objective under the Higher Ground Tourism Strategy, and reinforcing a culture of leadership and accountability across the sector.

Collectively, these convenings strengthened trust, reduced fragmentation, and helped align political and industry leadership around a common economic narrative for tourism.





Membership

- 114 member organizations, representing every dimension of Alberta's visitor economy
- Strong retention with targeted growth across priority sub-sectors

Engagement

- Ottawa Hill Day: 34 leaders participating in 20+ meetings
- Tourism Advocacy Summit: 280 attendees
- Economic Budget Forum & Premier's Dinner: 315+ attendees
- Regional Town Halls: 600+ attendees province-wide

Communications

- LinkedIn followers grew approximately 7% year-over-year
- Engagement rates exceeded comparator associations
- Newsletter open rates regularly in the 40–60% range

Policy & Advocacy Outputs

- Provincial pre-budget submission delivered
- Multiple economic, trade, and policy reports released
- Senate Inquiry successfully initiated
- Sustained provincial and federal engagement on trade, labour, air access, destination funding, resort development, and workforce supports



Celebrating Resilience: THE GRIT AWARDS

The Tourism Industry Association of Alberta's inaugural GRIT Awards marked an important milestone in recognizing the tenacity, innovation, and leadership that define Alberta's visitor economy. By celebrating organizations and individuals who demonstrate growth, resilience and innovation in advancing tourism through challenging conditions, this industry-led recognition sends a powerful signal that excellence is defined not only by results, but by the courage to adapt, collaborate, and lead.

Such awards matter because they come from peers who understand the realities of operating in Alberta's tourism landscape, lending credibility and meaning that top down accolades often lack. Industry-driven recognition also helps to elevate best practices, inspire emerging leaders, and showcase to governments and investors that tourism is a sophisticated, high-performing sector worthy of strategic support and long-term investment.

Inspiration Award: , TELUS Spark Science Centre
Resilience Award: Sundog Tour Co.
Growth Award: The Woods Experience





**“ Wherever you go becomes
a part of you somehow. ”**
~ Anita Desai



TOURISM
INDUSTRY
ASSOCIATION

 ALBERTA

Box 142, Calgary Stn Central
Calgary, Alberta, T2P 2H6

TIAALBERTA.CA