



Accelerating the Development of Alberta's Tourism Talent Pipeline

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The report was prepared by Applied Skills on behalf of the Tourism Industry Association of Alberta. Applied Skills is a Sherwood Park, Alberta based company that focuses on workforce development and training across multiple sectors of the economy.

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Executive Summary

This report provides analysis of the current state of the tourism workforce, identifying key challenges and opportunities for growth and development.

The report is informed by landmark recommendations made in a 2023 TIAA policy paper, “Labour Market Study of Alberta’s Tourism Sector,” as well as the directions articulated under the “People and Careers” pillar of the Alberta government’s Higher Ground Tourism Strategy. In particular, this report focuses on a suite of prescriptive actions that could be taken to strengthen the ‘talent pipeline’ that supports tourism.

The tourism sector in Alberta is a vital component of the province’s economy, contributing significantly to employment and revenue generation. The Government of Alberta has set an ambitious goal to grow the provincial visitor economy to \$25 billion annually by 2035. To increase the likelihood of achieving the long-term economic benefits of tourism, workforce development efforts will be required.

Competition for skilled labor is strong in Alberta as most sectors of the economy are growing. Alberta will continue to experience a tight labour market and without persistent and focused efforts, Alberta will struggle to reach its tourism economy potential.

There are a number of recommendations presented; however, the following is a suggested sequence of engagement efforts:

- Develop a youth engagement strategy
- Develop an influencer engagement strategy

- Undertake career pathway mapping
- Establish a tourism ambassador program
- Prepare an updated suite of promotional materials

To be successful, the tourism sector will need to rally around a common suite of tactics, using consistent messaging, and do so for a sustained period (i.e. several years) to have the desired impact. Achieving measurable outcomes may take several years of sustained effort to observe, and even longer to be felt broadly across the sector.

Based on desktop research and based on policy and program work conducted over many years working for the Government of Alberta, Applied Skills is recommending the suite of actions presented on Table 1 and Table 2 for consideration by TIAA. Table 1 – Priority Recommendation should be considered in the immediate term (1-2 years) and offer an area of focus in which to start. Table 2 – Supplemental Recommendations can be considered at a later date, after higher priority actions are underway.

Table 1 - Priority Recommendations

1 Develop a Youth Engagement Strategy – Based on research, design a focused strategy for engaging youth with the intent of attracting them to explore and participate in the tourism workforce.

2 Develop an Influencer Engagement Strategy – Based on research, design a focused strategy for engaging influencers (parents, teachers, school administrators, counsellors, etc.) with the intent of enabling them to discuss and promote tourism career pathways.

3 Undertake Career Pathway Mapping - Map a series of diverse career paths that illustrate both actual and theoretical career paths a new entrant into the tourism workforce might take over the course of their career.

4 Establish a Tourism Ambassador Program – Establish a Tourism Ambassador program that identifies and supports targeted professionals in the tourism sector and equips them to be workforce advocates.

5 – Prepare a Suite of Updated Promotional Materials – Build (or leverage) a suite of current promotional materials for use by members and employers to promote tourism careers.

Alberta’s tourism sector thrives on people—growing our workforce through bold strategies is key to sustaining success and driving future growth.



Priority Recommendations

1) Youth Engagement Strategy

Recommendation – Based on research, design a focused strategy for engaging youth with the intent of attracting them to explore and participate in the tourism workforce.

Underlying Considerations

Current Tourism HR Canada (THRC) data signals high youth attraction and participation in the tourism economy. The challenge now is to focus on maintaining high attraction rates, while also refining efforts to attract those that are more likely to stay in the sector for longer periods of time. There are a variety of tactics in use by numerous sectors that can and should be employed:

Career Fairs

- Inventory the key career fairs being held annually by Government, employers, post-secondary institutions, and high schools across Alberta.
- Highlight the most strategic events and ensure there is a ‘tourism workforce’ presence at key events (i.e. employer or Industry booths that are staffed).

Social Media Campaign

- Design targeted social media to promote tourism careers generally, and/or specific job or regional opportunities.
- Leverage numerous social media platforms.

Virtual Tour

- Join high school classrooms (likely virtually) to promote career opportunities in tourism sector. In larger centers, face to face opportunities could be pursued.
- Additionally, this could be accomplished by creating and leveraging high quality videos.

Presence at Science Centers

- Work with Telus Spark in Calgary and the Telus World of Science in Edmonton to promote tourism generally. This does not need to be a permanent (and costly) display or station. Instead, a presence can be small, mobile, and technology focused. I.e. use virtual reality to showcase certain regions and roles.
- There are experts at both science centers that would be willing to discuss and explore opportunities. This tactic is likely focused more on exposing younger audiences to tourism generally and to start priming youth to consider tourism related careers.

The tactics for youth engagement should be selected based on data collected by TIAA via research currently underway. The target audience will identify the best ways to engage them and identify where they get information. Any efforts to engage youth needs to consider and address the fact that the tactics are often going to be engaging youth who are minors.

Ensure all materials and messages are evaluated with experts and likely a youth-based focus group prior to broad use (e.g. consider content in the context of English as a second language, and other multicultural learning considerations).

Understanding when parental consent may be required, or advised, is important to be aware of. As per THRC, most Canadians (whether they have worked in tourism) believe that it provides valuable work experience (73%), is exciting (62%) and it offers interesting roles (60%). These messages are a great starting point to engaging youth and influencers and form the basis of future campaigns.

Potential performance indicators include:

- The number of youths that are engaged at specific events.
- The number of youth (based on surveying) that indicate their attendance at an event positively affected their decision to pursue a role in tourism.

2) Influencer Engagement Strategy

Recommendation – Based on research, design a focused strategy for engaging influencers (parents, teachers, school administrators, counsellors, etc.) with the intent of equipping them to discuss and promote tourism career pathways.

Underlying Considerations

Targeted opinion research (new or existing) may inform the opinions held by influencers. Typically, influencers tend to have a common suite of views regarding tourism related careers:

- The wages or salary are not high enough to achieve at least a living wage.
- There is little to no room for advancement in the sector.
- The work is mostly part-time or seasonal, making average weekly earnings unreliable.
- It is typically a low-skilled sector.

Based on findings from previously conducted research, an Influencer Engagement Strategy (Strategy) and toolkit would be built. The Strategy would include an inventory of key influencer groups:

Education Sector:

- Alberta Teachers' Association (ATA) and its local chapters
- College of Alberta School Superintendents (CASS)
- Alberta School Councils' Association (ASCA) - represents parent councils.
- Alberta School Boards Association (ASBA)
- Alberta Catholic School Trustees' Association (ACSTA)
- Alberta Federation of Independent Schools
- First Nations, Métis, and Inuit Education Professionals

Post-Secondary Career Services:

- Post-Secondary Career Centers (University of Alberta, University of Calgary, NAIT, SAIT, etc.)
- Alberta Association of Career Colleges
- Alberta Career Development Association (ACDA)



Parent Organizations:

- Parents Empowering Parents (PEP)
- Alberta Federation of Parent Teacher Associations
- The Association of Parent Support Groups in Ontario (has Alberta chapters)
- Cultural parent associations (e.g., Chinese, Filipino, South Asian parent groups)
- Tactics would include proactively engaging in conferences, annual general meetings of the above noted organizations, and setting up 1-1 technical briefings with key influencers or organizations.
- Teacher retreats could also be included as a tool. Tourism industry partners could host teachers in key regions of the province for specific workshops.
 - These could be short (i.e. half-day) and focused on a certain geographic region or targeted sector and be used to equip teachers with current and accurate information.

This approach would support and involve TIAA members in playing an active (yet coordinated) role. A Toolkit would be built that includes a series of tools to support engagement; including key messages, questions and answers, leave behind/fact sheets, slide decks with speaking notes, op-eds, testimonials etc. If the ATA, or select school boards, were interested, specialised content and materials could be created to assist with incorporating tourism into curriculum or promoting tourism careers.

There are many instances where tourism scenarios can be used in science, math, and social studies. This tactic has been used extensively by the construction sector and could be replicated (e.g. this content could leverage the THRC library of content).

Potential performance indicators include:

- The number of influencers contacted in a year.
- The change in opinions and views held by influencers over time (will require ongoing survey work).

3) Career Pathway Mapping

Recommendation – Map a series of diverse career paths that illustrate both actual and theoretical career paths a new entrant into the tourism workforce might take over the course of their career.

Underlying Considerations

A career path is essentially the sequence of jobs or positions an individual takes as they progress through their professional lives. Often, no two career paths are the same, but there will be themes and trends that can be observed and replicated.

Tourism HR Canada data from November 2023 indicates that of those who had worked in the tourism sector and left, 65% of them left the sector because it did not appeal to them as a long-term career option.

Mapping a career path can be highly informative to potential new entrants considering a tourism career. Career maps can illustrate navigating both areas of interest, and areas of career progression (i.e. moving into more senior roles over time),

Mapping allows potential entrants to “choose their own adventure” as they imagine what a long-term career might look like. Career path mapping is also an opportunity to highlight how specific education or training pathways can contribute to certain opportunities over a career. Students are often better informed to make post-secondary educational choices after seeing both theoretical and /or actual career paths.

Mid-career professionals can benefit from specific career pathway maps as well. There will often be multiple entry points into tourism at varying levels and in numerous professions. Many people will start careers in marketing, finance, human resources, technology, etc. outside of tourism, and acquire skills and competencies that are of significant value within the sector.

Discover Tourism offers a starting point at their career pathways page. Additional effort could be invested to articulate these pathways in greater detail, map skill and competencies against roles, overlay educational and training opportunities that contribute to progression, etc.

Mapping the path of a series of senior professionals in tourism also creates testimonials and demonstrates how Albertans have successfully created careers in tourism. Early exposure to various career pathways, especially over time (for example between grades 9-12) will begin to address the genuine and prevalent concern youth have that tourism only affords seasonal or temporary opportunities.

Robust career pathway mapping, especially when mapping skills and competencies, can be a time-intensive activity, and involve surveying, interviews and focus groups. Successful mapping would require a handful of committed champions that are willing to volunteer their time and share their experiences in the sector.

Career pathway mapping can include an element of skills mapping as well.

- Core skills and competencies for each role in a career journey are also captured during the mapping exercise.
- Skills mapping will identify where skills overlap, and where skills can serve as a pre-requisite for future positions.

Potential performance indicators include:

- The number of youths entering targeted post-secondary programs.
- The number of youths participating in internships or work-integrated learning opportunities.
- Retention rates of youth in tourism.
- Rates on conversion from entry level to supervisor to manager type roles (i.e. progression).
- Industry trends in retention (i.e. increased retention and / or decreased turnover).
- Measuring many of these performance measures will be time and resource intensive and require collecting data over longer periods of time.
 - However, if longitudinal analysis is not desired, the performance indicators could focus more on understanding how the career pathway maps influenced decision to enter tourism, vs. tracking over time.

4) Tourism Ambassador Program

Recommendation – Establish a Tourism Ambassador program that identifies and supports targeted professionals in the tourism sector and equips them to be workforce advocates.

Underlying Considerations:

A structured Tourism Ambassador program creates an opportunity to both recognize community leaders participating in the tourism economy and leverage their experience and energy in advocating and promoting tourism careers.

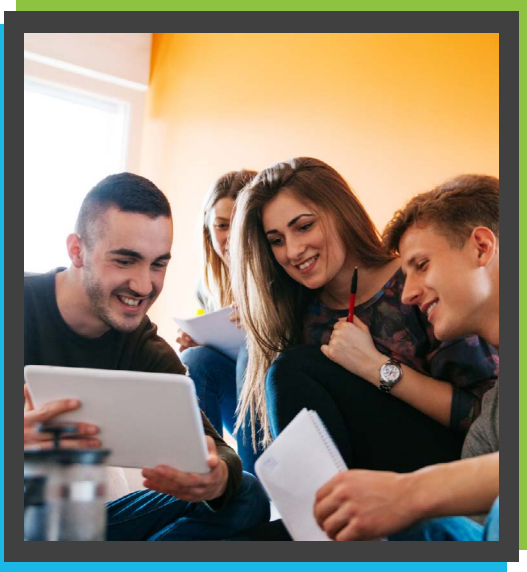
Typically, a tourism ambassador program is considered in the broader context of recognition. Ideally, it forms one facet of a community led recognition program where community members can be acknowledged for their contribution to local tourism outcomes. A broader recognition program can recognize the effort and contribution made as a one-off award i.e. to celebrate community leaders or specific community events.

In some instances where it's desirable this awards or recognition process can be leveraged to establish community tourism ambassadors that promote tourism locally and regionally.

A tourism ambassador program can target professionals in Alberta of varying ages, across a range of geographic regions, and spanning numerous sectoral occupations. The intent is to select professionals that are participating in the tourism economy today, are considering staying in this sector, and that are willing to be spokespeople.

Ambassadors would speak at high schools and post secondary institutions, address Chambers of Commerce, speak at conferences, and meet with local media, highlighting the positive attributes of tourism careers with credible testimonials.

Additionally, ambassadors can advise government on the challenges and opportunities for workforce development in tourism and help reinforce employer and industry priorities for all three levels of government.



A Tourism Ambassador program can be created formally or informally. A potential benefit of a more formal approach would be the Government of Alberta's ability to establish the program under the Government Organization Act. This would allow the province to formally appoint members and remunerate them for their efforts. It also increases the likelihood that government will engage with and deploy Ambassadors.

A less formal approach could be led by the tourism industry directly, and not the government, this would allow employers greater leeway in selecting members to become tourism ambassadors, although it reduces the likelihood of attracting government attention.

In either approach effort will need to be made to equip ambassadors with current, factual information and materials to support their advocacy efforts.

Potential performance indicators include:

- The number of events and engagements that Ambassadors participate in on an annual basis.
- The number of employees who indicate that their career decisions were informed, and possibly influenced by, Tourism Ambassadors.

5) Updated Promotional Materials

Recommendation – Build (or leverage) a suite of current promotional materials for use by members and employers to promote tourism careers.

Underlying Considerations:

A common, current, and shared promotional materials toolkit can be used in numerous

instances by members and employers across Alberta. While some materials likely exist today, additional Alberta centric materials could be created that highlight specific opportunities and Alberta context, and that are created with Alberta audiences in mind.

A promotional materials toolkit might contain some or all of the following:

- Key messages on the tourism workforce (likely broken down by target audience; youth, influencer, government, investor, etc.)
- A question-and-answer document that anticipates the likely questions to be received from each target audience with prepared answers.
- Briefing notes that provide specific context on the regional workforce generally or specific issues challenges or opportunities to be highlighted.
- Pre-built social media messaging that includes high quality photos and key messages that are formatted and ready for immediate use on social media platforms.
- An inventory of key contacts and tools where stakeholders can reach out to find more information.
- An inventory of career pathway brochures that can be left behind.
- Third party promotional materials from specific employers, post secondary institutions, government fact sheets, etc.

A thorough scan of all existing and available promotional content should be conducted to assess currency and relevance of materials. There are likely numerous resources available that can be leveraged to accelerate the completion of an initial suite of promotional materials (i.e. Tourism HR Canada and Discover Tourism).

Access to key materials should be facilitated either via the member's access portion of the TIAA site, or, perhaps, as part of a dedicated Alberta microsite within the Discover Tourism website. This content should be available free of charge to members and employers for use.

The content in the toolkit should be reviewed annually for currency and updated as required.

Potential performance indicators include:

- The amount of traffic accessing the TIAA website (potentially focus on the workforce development and tourism career promotional pages).
- Feedback from employers or organizations on the value and utility of the promotional materials used.



Secondary Recommendations

6) Chamber of Commerce Tour

Recommendation – Partner with local Chambers of Commerce (or the Alberta Chamber of Commerce) to create tourism workforce focused events in select Chambers across Alberta.

Underlying Considerations:

The intent is to bring together local Chamber members, employers, youth, influencers, post secondary institutions, and elected officials to celebrate and explore tourism focused careers. Events could be held at a local tourism employer site to profile tourism in a community.

A Chamber of Commerce Tour (Tour) can be easily scaled. It can be planned as a series of regional or provincial Tour events or be conducted locally at the single Chamber level. These events can target youth and influencers, and form part of targeted engagement strategies recommended elsewhere in this document.

This recommendation can involve either directly hosting and running events in partnership with a Chamber, ensuring, of course the involvement of the local DMO, or creating a toolkit that can be leveraged by Chambers to run their own events. A toolkit could include an agenda, opening remarks, prepared social media and promotional materials.

These events can be held at any point throughout the year or concentrated at specific times to leverage impact (i.e. during Tourism Week). If Youth Ambassadors were in place, Tour events would be excellent opportunities to showcase the Ambassadors and provide them opportunities to directly address participants and local media.

Some Chamber tours are centered around a Government of Alberta Minister (i.e. the Minister of Sport and Tourism). This could be considered for some individual or a series of events, however, will introduce additional logistical and planning considerations for the host Chamber and event organizers.



Supplemental Recommendations

Table 2 - Supplemental Recommendations

<p><u>7 Alberta Workforce Tracking</u> – Establish a systematic and regular research series to collect workforce related data from Alberta tourism employers.</p>
<p><u>8 Access Government of Alberta Programs</u> – Work with the Government of Alberta to explore specific applications of programs offered at Advanced Education, including Apprenticeship Expansion, Industry Pathways, Micro-credentials, and Work-Integrated Learning.</p>

7) Alberta Workforce Tracking

Recommendation – Establish a systematic and regular research series to collect workforce related data from Alberta tourism employers.

Underlying Considerations:

Today, high quality data on the tourism workforce is collected by several organizations, most notably Tourism HR Canada. TIAA has also collected data using a third-party on an ad-hoc basis, around pandemic recovery and to support election-based advocacy. This work offers an excellent starting point on survey design and baseline metrics.

Regular and ongoing workforce research involves surveying employers on a cyclical basis to understand the top labour and workforce related issues being faced by the tourism sector. Research can identify:

- ❑ Emerging skills gaps, recruitment challenges and general trends.
- ❑ Insights for action that can be taken to address emerging issues.

This would represent an opportunity to see the impacts of other policy actions and their effect on workforce challenges. This survey tool and cycle could be utilised to collect periodic data on specific outcomes related to numerous workforce related actions. Predictable and quality data collection demonstrates value to stakeholders and would support evidence-based advocacy or decision making by multiple organizations in the tourism ecosystem.

This data would inform future Government funding decisions in workforce programming. Research could include a standardized employer survey with core questions, in depth interviews with key industry leaders, and focus groups with employers in different regions or sub-sectors.

A short and focused bi-annual survey of baseline questions posed exclusively to Alberta employers would be straight forward to design and execute. It is possible that Alberta could leverage to the research team at Tourism HR Canada to create and deliver Alberta focused data with minimal cost and effort.

Alberta would benefit by collecting data from employers of varying size and geographic region to identify more nuanced and specific observations (and respond with specific supports and policy).

This overall approach can help transform Alberta-centric workforce research from a one-off activity to a strategic ongoing initiative that provides value to the tourism sector and provincial economy.

Potential performance indicators include:

- ❑ The number of employers experiencing improvement in addressing workforce challenges.
- ❑ The length of time employees stay in place or role.
- ❑ The percentage of positions requiring specific skills (and the skills required).
- ❑ Training investment, and type of training, per employee.

8) Access Government of Alberta Programs

Recommendation – Work with the Government of Alberta to explore specific applications of programs offered at Advanced Education, including Apprenticeship Expansion, Industry Pathways, Micro-credentials, and Work-Integrated Learning.

Underlying Considerations:

Higher Ground made the recommendation to “*Work with industry to design training and apprenticeship programs to develop skills, knowledge, and competencies for careers in tourism and hospitality.*” The province will likely be primed to accept ideas and opportunities to expand use of apprenticeship in the sector.

Specifically, the following opportunities could be explored in partnership with the Province:

Apprenticeship Expansion - was a pilot that launched in the spring of 2021 and invested approximately \$6.5M across eight post-secondary institutions.

The intent was to take existing 1-year certificate programs and two-year diploma

programs that were delivered traditionally (i.e. primarily in the classroom) and convert them so that most of the credentialed learning took place on the job.

To advance this goal, key tourism leaders would need to meet with staff from the province and those post secondary institution that piloted the tourism and hospitality programming to discuss current state, enrollment, learning outcomes, and lessons learned from the pilot.

An opportunity exists to explore another offering of the Apprenticeship Expansion program that focuses exclusively on tourism and hospitality related programming at Alberta post-secondary institutions

Industry Pathways - Launched in February 2023, Industry Pathways is a program that enables occupations to make use of the apprenticeship learning model and/or become a designated trade.

One of the key potential benefits of most programming built under Industry Pathways is the opportunity for learners who meet completion requirements to receive a government issued credential, which could/should be recognized by industry and employers.

Additionally the province is currently offering third party consultant support to help select applicants engage across their sector to understand the best pathway to pursue, and support for building learning outcomes and curriculum.

Alberta would be willing to discuss and explore the viability of the Industry Pathways program in the context of supporting the tourism workforce.

Work integrated Learning (WIL) is a term for experiential or on-the-job learning. A student or trainee participates in a paid work placement in their field of study and obtains significant on the job experience. In most instances a WIL opportunity counts for credit towards a post-secondary credential.

The Government of Alberta has recently wrapped up a Work Integrated Learning Industry Voucher pilot program that provided work placements to approximately 650 post-secondary students over 3 years. Employers that hosted a WIL student received a \$5,000 wage subsidy to offset a portion of labour costs as an incentive to encourage hiring and training of students near completion, or recent graduates.

Micro-credentials are short-term, flexible learning programs designed to help Albertans develop specialized, job-ready skills to quickly re-skill. In some instances, micro-credentials can 'stack' so that that when a learner completes a certain number of micro-credentials, they are awarded a post-secondary or industry credential. A micro-credential is often highly focused on a skill or specific area of knowledge and tend to be short in duration.





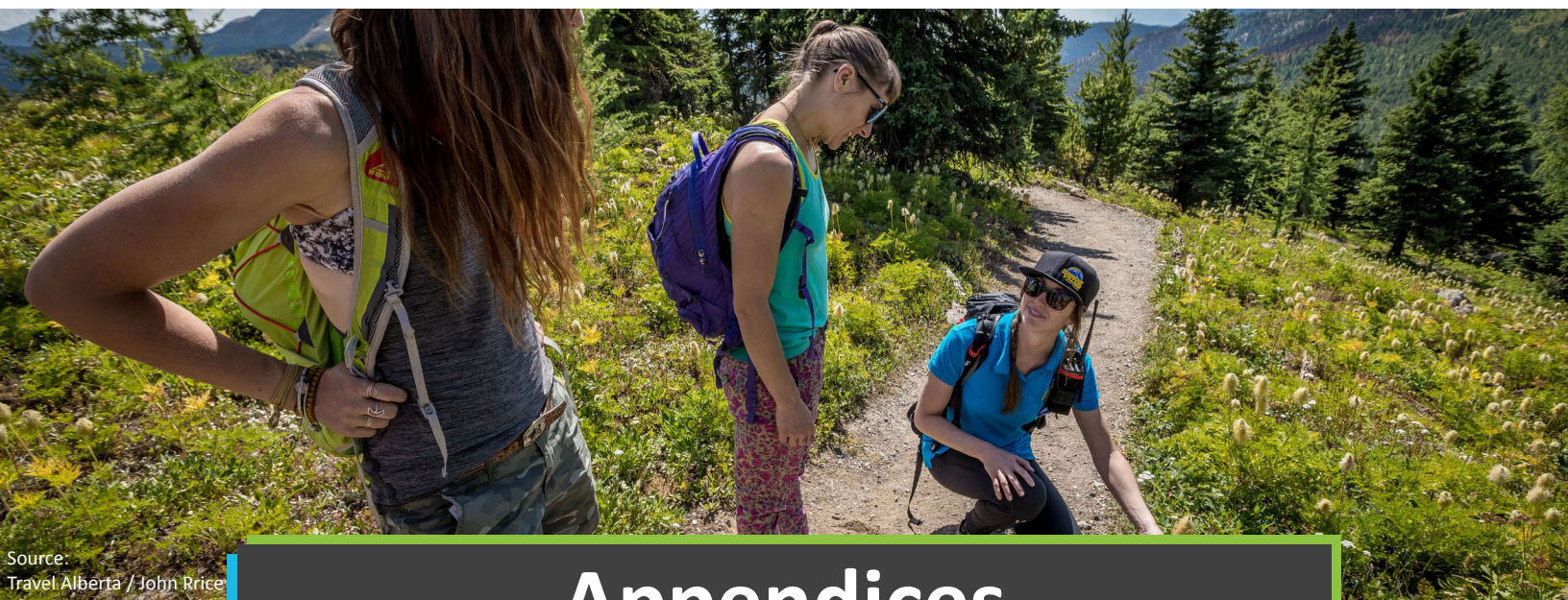
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Potential performance indicators include:

- The number of employees/trainees that participate in these programs on an annual basis.
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Source:
Travel Alberta / John Rice

Appendices

Context and Background

The purpose of this desktop research is to identify a suite of actions that can be undertaken across the tourism sector to strengthen workforce development.

In particular, the recommendations presented focus on the greater attraction of new entrants into the workforce, rather than on retaining staff who currently are in role. Retention solutions tend to be driven by the economy (i.e. job security, average weekly earnings, employment/unemployment rates, strength of currency etc.) and often are out of the control, or even influence, of many of the key actors in the sector. Attraction solutions tend to be lower cost to put in place and are often more actionable by actors in this space.

This research does not focus on attracting new Albertans (i.e. new arrivals to the province or immigrants) to the sector and instead targets current and existing residents of the province.

Based on October 2024 data from Tourism HR Canada, there are approximately 2,0750,000 individuals employed in tourism related jobs, which accounts for 10% of all Canadian employment. When compared to 2019 (pre-pandemic levels) the workforce is generally the same size, however some sub-sectors are noticeably smaller than 2019; accommodation sector is down 21% and food and beverage is down 1.6%, while recreation and entertainment is 12.4% larger than in 2019.

Within the tourism economy, there are a series of subsectors that are commonly reported on. While the groupings and their titles may vary, they tend to be clustered in:

- Accommodations,
- Food and beverage services,
- Recreation and entertainment,
- Transportation, and
- Travel services.

For the purposes of planning and destination management the province is broken up into 13 regions ([Destination Development Team | Travel Alberta](#)).

Opportunity

There are significant economic opportunities for the province of Alberta to grow its tourism and experience economy. Tourism is the top service export sector in the province of Alberta and generated \$4.4B in revenue in 2022. In 2023, international visitor spending was at \$2.9 billion, a 25% increase over 2022 levels.

In February of 2024, Alberta released “Higher Ground: A Tourism Sector Strategy”, a new provincial strategy to focus greater attention on opportunities in the tourism sector. The report notes that tourism is a major economic driver of diversification and is a primary employer of new and young Albertans and that the Government of Alberta’s goal is to grow the provincial visitor economy to \$25 billion annually by 2035.

The strategy is built around five pillars: Leadership and Alignment, Competitive Products, People and Careers, Expanding Access, and Indigenous Tourism. The People and Careers pillar contains several recommendations:

- Develop a Tourism and Hospitality Stream as part of the Alberta Advantage Immigration Program.
- Work with private sector partners and industry associations to address immediate needs including skills and training, immigration, workforce housing, and transportation.

- Work with industry to design training and apprenticeship programs to develop skills, knowledge, and competencies for careers in tourism and hospitality.

There is currently strong youth participation in the tourism workforce. According to Tourism HR Canada, in the 2021 census, youth (aged 15 to 24) made up around 27% of the tourism workforce, compared to 12% of the total Canadian workforce. Around 71% of these young workers worked part-time (fewer than 30 hours per week).

Many sectors of the economy are struggling to attract youth and the current youth participation rates in tourism should be viewed as a strategic advantage for the sector. For some youths, the part-time and/or seasonal nature of many tourism jobs is appealing as it meets their short term-needs for employment.

Challenges

Seasonality of work

The tourism economy experiences seasonal fluctuations, making it difficult to retain skilled workers during off-peak periods and maintain consistent staffing levels throughout the year, particularly in resort destinations and outdoor recreation areas. This is not universally true across all sub-sectors or employers but is common enough to be considered a system wide challenge shared by a considerable number of tourism entities.

Skills Gaps

There is often a mismatch between the skills employer's need and what workers possess, especially in areas like digital marketing, customer service technology, and experience design. This gap is particularly pronounced as the industry evolves to meet changing consumer expectations.

Perception Issues

The industry often struggles with the public perception of tourism jobs. Many Canadians view tourism jobs as temporary or transitional rather than viable career paths, making it difficult to attract and retain talented individuals, especially younger workers.

Training Resources

Small and medium-sized tourism businesses, which make up a sizable portion of the sector, often lack the resources and capacity to provide comprehensive training programs for their staff. Inadequate training and professional development programs, and limited growth opportunities are a key driver of employee turnover.

Geographic Challenges

Remote and rural tourism destinations frequently struggle to attract and retain qualified workers due to housing shortages, limited transportation options, and fewer amenities compared to urban centers.

Compensation

Lower than average wages (in some instances) and limited benefits are a challenge across the sector that affect attraction and retention. Most employees receive an hourly wage vs. a salary, and work in non-unionized environments. Part-time or seasonal employees tend to have lower wages than their full-time counterparts and are less likely to receive gratuities or bonuses. The HR Tourism Survey (Nov 2023) has multiple instances of low wages being the key barriers or concern. Low wages (or total compensation) are a challenge internationally, not just in Canada and Alberta.

Data Gaps

Based on an e-scan of publicly available data, there appears to be limited data and analysis specific to Alberta. Additionally, there is almost no data available that focuses exclusively on the views of teen and influencers. There are only a few primary data sets available where direct opinions are documented. Additional data may be held privately by employers or other associations, however, is not accessible for research purposes.

Housing / Accommodation

The availability of affordable housing directly impacts the ability of tourism employees to reside near their place of work, particularly in popular tourist destinations where housing costs can be exorbitant and housing units hard to find. Housing shortages hamper recruitment and retention efforts, but also subjects workers to prolonged commutes, increased financial burden, and heightened stress levels. The challenges posed by expensive housing are particularly burdensome for student workers, who often have limited financial resources and require affordable living options.

Research and E-Scan

Numerous publications and sites were examined in this research (see s.7.0 References for a complete list). Several key publications reviewed are summarized below.

Tourism HR Canada. Perceptions of Tourism as a Place of Employment. November 2023.

This report is based on Leger research into general population opinions on employment in tourism among Canadians. Specific objectives include understanding:

- Current or previous experience in tourism employment.
- Perceptions of the skills acquired in tourism employment.
- Perceptions of working in the sector.
- Interest in working in the sector.
- Assessing views on employment in tourism generally.

Leger surveyed 2500 randomly recruited Canadians, all 18 years or older. Select observations include:

- More than half of Canadians (54%) have worked in tourism, with 10% currently doing so.
- Sixty-four percent think the pay is too low.
- Forty-two percent of Canadians are willing to work seasonally.
- Most Canadians (68%) believe that working in tourism is valuable to career development and helps develop soft skills such as communications, leadership, and critical thinking.
 - Among those who have worked in tourism, they did so because the temporary and flexibility worked while they were students (37%).
 - They value the work hours and shift flexibility.
 - However, 65% of them that left the sector did so because they did not see long term career opportunities.
- *“To attract more Canadians to enter the sector, financial incentives, including higher pay/compensation (40%), benefits (31%), travel discounts (28%) or job perks (27%), and offering full-year (27%), full time hour (24%) positions, and the ability to visit new places/travel (27%) would increase willingness to work in the tourism sector, particularly among younger Canadians (under 45)”.*

Most Canadians (whether they have worked in tourism) believe that it provides valuable work experience (73%), is exciting (62%) and it offers interesting roles (60%).

These messages are a great starting point to engaging youth and influencers and as the basis of future campaigns. The main arguments against pursuing or maintaining a career in tourism include low compensation, stressful jobs, seasonal employment, lack of long-term stability, and limited opportunities for advancement.

OECD Tourism Trends and Policies 2024

This research is a biennial publication of the Organisation for Economic Co-operation and Development (OECD) that provides comparable data across 50 OECD member nations and partner countries. The pressures facing the tourism workforce, in particular labour shortages and skill-gap challenges, are international and widespread in all sectors of the tourism economy.

Building a sustainable workforce is critical to the sustainability of a resilient tourism sector. Globally, the biggest challenges facing workforce development are wages and the stability (instability) of the work.

Workers in the sector are likely to develop high emotional intelligence, and communication and teamwork aptitudes. These interpersonal skills are highly transferable and make tourism sector employees desirable to other sectors.

There is no 'one size fits all' type action or solution for workforce development. The sectors are highly fragmented with numerous region-specific challenges.

Globally, the demand for flexible working conditions (i.e. hybrid models or strictly working from home) have accelerated since the pandemic. Given the front-line nature of many tourism jobs, this presents a serious challenge.

The demand for digital and technical skills is growing, as use cases for AI and machine learning, automation, or smart devices in tourism are steadily increasing. However, SME's will continue to struggle with maintaining awareness and / or accessing technology.

Key policy considerations to strengthen the tourism workforce include:

- Integrating the needs of tourism workers into wider economic and community development strategies.
 - This includes direct concerns (wages, access to training, working conditions) and indirect concerns (housing, transportation, and childcare).
- Leverage private sector initiatives to improve working conditions and attract and retain tourism workers.
- Facilitating strong linkages between private sector and education providers to meet the changing needs of the sector, including preparing for the green and digital transitions.
 - It takes formal education supplemented by on-the-job training to ensure readiness of the workforce.
- Support tourism SME's and employees to adapt to digitalisation and adopt greater use of digital technology to ease workforce pressures.
- Collect and share robust and granular data on tourism employment and workforce issues.

Conference Board of Canada – The Future of Canada’s Tourism Sector: Labour Demand and Supply Analysis

Revenues have grown significantly since the pandemic but the number of jobs in tourism (year end of 2023) are about 3.9% below pre-pandemic levels. Labour demand will grow steadily between 2023 and 2040 and is expected to be approximately 2.77M jobs in 2040 (up from 2.16M in 2023).

Labour supply is expected to be below demand in the same timeframe, resulting in a tight labour market for the next 15 years. Food and beverage services will experience the largest share of vacancies in tourism and face the greatest labour challenges.

The current federal policy of reducing international student permits is putting downward pressure on the labour supply for tourism, in particular in the food and beverage sector.

The key workforce issues facing the tourism sector include:

- Increasing operational costs
- Wage expectations of potential employees are too high.
- Lack of affordable nearby housing and accommodations
- Difficulty in hiring and retaining qualified, reliable employees.
- Shortage of skilled labour in the local area
- Youth are uninterested or unaware of jobs in tourism.

A significant issue is “Youth Disinterest” and there are numerous reasons contributing to youth disinterest:

- Impacts on work-life balance due to unpredictability of hours
- Lack of guaranteed hours
- Low wages and a lack of benefits
- The belief that there are few prospects for career growth
- Lack of reliable public transit
- Limited opportunities for working from home

Most of these factors have persisted for many decades. However, youth seeking hybrid opportunities that allow them to work from home at least part-time is a new variable and has quickly become a near top-of-mind priority for younger employees. The pandemic impacted so many roles in tourism and youth who were affected, or observed those impacts, see the sector as unstable.

Employers also note some challenges when hiring and working with youth:

- A perceived reduced work ethic among younger people
 - (i.e. unwillingness to work overtime or during holidays, excessive cell phone usage while at work)

- a sense of entitlement
- increased mental health concerns
- a lack of loyalty to their employer
- greater willingness to move between employers compared to younger workers in the past

Recommendations in the report include:

- Greater collaboration between governments and tourism associations alongside local chambers of commerce and destination management organizations.
- There is an opportunity for tourism stakeholders to better communicate and promote the tourism sector as a place of employment and career path for youth.
- Affordable housing and reliable transportation are essential for recruitment and retention to reduce financial and stress burdens for workers.
- Large organizations generally find international worker programs to be effective in addressing labour shortages, while smaller organizations face issues with the administration, costs, and procedures.

Government of Alberta. Workforce Strategy for Alberta's Tourism and Hospitality Industry. 2007

In 2007, a Workforce Strategy for Alberta's Tourism and Hospitality Industry was developed collaboratively with government and stakeholders from the tourism and hospitality industry. Invited industry representatives participated in focus groups to develop the initial strategy draft.

Subsequent meetings were held with industry sector associations to provide further input, validation and identify lead contributors for the priority actions before finalizing this document.

While dated, this document was reviewed and included as a snapshot from 15+ years ago on the context and challenges facing tourism workforce development, and to inventory the recommendations of the day.

The Government of the day generally framed its role as a convening partner that was bringing industry together to discuss solutions and viewed Industry as the lead in implementation in most instances. Alberta is faced with a significant labour and skills shortage across most sectors of the economy.

Tourism is an essential element of Alberta's economy, which contributes significantly to jobs, and general diversification outcomes.

- In 2006, tourism revenues contributed \$5.3B to the economy.
- Ninety percent of tourism businesses are small-medium (less than 50 employees)

and contribute significantly to employment in rural communities.

- Approximately 10% of the workforce work in tourism and hospitality.
- The accommodation and food sector accounts for 60% of total tourism industry employment.
- Part-time and seasonal work is more prevalent than in other sectors of the economy.
- Many business face staffing shortages, especially during peak tourism seasons.
- The sector relies heavily on youth. In the accommodation and food services sector, youth made up 47% of the workforce.
- Wages for many jobs in industry fall below the average wage in Alberta.
- The industry is seen as a good entry point for youth and newcomers into the workforce.
- The sector is expected to see significant growth in the next 10 years.

Key labour force challenges exist for the sector, including:

- Business in Alberta's tourism and hospitality industry are facing fierce competition for entry-level workers.
- The industry relies heavily on youth workers.
- Attraction of workers from under-represented groups.
- Immigration programs are unresponsive to industry's needs.
- High staff turnover rates.
- Shortage of affordable housing.

Select recommendations include:

- Inform Albertans about the magnitude of the labour supply issues to build support for policy responses.
- Develop a strategy to promote employment in tourism and hospitality.
- Encourage increased participation of high school students in industry through marketing campaigns that target students, parents, and high school counsellors.
- Promote and share industry best practices for attraction and retention.
- Conduct or review existing research to better understand the reasons why people choose not to enter, or decide to leave, the tourism sector.

- Propose changes to temporary foreign worker policies (including adjusting the immigration points system and expand the provincial nominee program).
- Enhance and/or promote existing youth work and travel programs in other parts of Canada and other countries.
- Partner with other sectors on recruitment campaigns for attracting workers to Alberta.
- Advocate to municipalities and the Alberta government to expand affordable housing.
- Develop a strategy to strengthen human resource management practices throughout Alberta's industry.
- Increase collaboration between industry and educational providers to develop workplace-based training programs.
- Promote increased investment in employee training and development.
- Encourage increased employer participation and investment in the apprenticeship and industry training system.
- Advocate with the provincial government to expand and strengthen tourism studies in high schools to promote tourism and hospitality careers.
- Propose increasing the capacity in tourism and hospitality programs at the post-secondary level.
- Identify practices that may benefit from adopting innovative technologies.
- Encourage the contribution of mature workers.
- Lobby for increased incentives for students to combine education and employment.

Implementation challenges that industry leads may face include:

- Assigning priorities to actions.
- Engaging all industry members and other stakeholders and securing their commitment to collaborate in moving forward with specific actions.
- Avoiding fragmentation and duplication of implementation activities within their industry and other industries.
- Collaborating with stakeholders in other industry sectors on cross-sector initiatives.
- Monitoring labour market conditions within their industry, the province, and in some cases, nationally and globally; and adjusting strategy actions and priorities to respond to changing circumstances, and

- Keeping the momentum going on the implementation of strategy actions over the next decade.

Additional Considerations

There are numerous additional factors for TIAA to consider when assessing which policy actions to take or advocate for. While some of which are inventoried below, this inventory is not meant to be exhaustive.

Budget Dependency

Almost all the policy actions proposed will come with a financial cost and require time either TIAA, their members, or external consultants. This report is prepared based on an assumption that the TIAA request submitted to the government in November 2024 is approved in whole or in part via Budget 2025.

Outcomes are long-term in nature

It will be important for TIAA to continue to communicate to members and government that workforce development and the building of a talent pipeline will take several years of focused and shared effort. Impacting the tourism workforce in a way that is measurable will take several years and members should be aware of the medium-term horizon associated with the high-level goals of this policy advice.

Sequencing and bundling

The recommendations that TIAA chooses to proceed with will inform the proper sequencing of this work. In general, the research phase would primarily happen in year 1 as it informs at least some of the advocacy, promotion, and policy advice. Once TIAA approves the final recommendations and has secured government of Alberta funding, a robust work plan over likely a three-year horizon would be prepared that identifies the steps and milestones for each project, interdependencies between the projects, and a detailed approach for execution.

A few of the policy recommendations in this report can be bundled together into larger projects for execution, however, are presented here in a smaller and more discreet manner to allow TIAA to select and combine them as they see fit. A piece meal list allows for different combinations and makes it easier to brief to both government and members.

Many recommendations will require partners. As an organization, TIAA is focused almost exclusively on advocacy on behalf of its members and does not get involved in direct program design or delivery. Some of the options presented in this report may necessitate partnering with major employers, other associations, or post secondary institutions, to enable delivery and execution. For TIAA to consider program delivery as an in-house function would require significant additional analysis.

Risk of “intermittency”

Intermittency, in the context of this report, would be when investment and effort to advance these recommendations is essentially ‘on again-off again.’ It would see promotion efforts that are not continuous and instead are disrupted or occur happenstance over time, or policy advancement where TIAA or its members participate only occasionally on an ad-hoc basis.

Typically, when intermittency emerges as a prevailing trend, the likelihood of successful implementation is reduced. To mitigate intermittency requires sustainable ongoing funding and effort on behalf of all involved.

Linkage with Higher Ground

The provincial tourism strategy (Higher Ground) names several recommendations related to workforce:

- *Develop a Tourism and Hospitality Stream as part of the Alberta Advantage Immigration Program.*
- *Work with private sector partners and industry associations to address immediate needs, including skills and training, immigration, workforce housing, and transportation.*
- *Work with industry to design training and apprenticeship programs to develop skills, knowledge, and competencies for careers in tourism and hospitality.*

TIAA should stay close to the Ministry of Tourism and Sport on the advancements of these recommendations. Consideration could be given by TIAA to making these higher priorities given that all three have been identified by the Government.

Key Actors in the Tourism Space

Tourism Industry Association of Alberta (TIAA)

TIAA is a not-for-profit tourism association that advocates on behalf of all segments of Alberta’s tourism economy for a competitive and sustainable business environment that generates economic value for the province. TIAA conducts research, prepares policy positions, hosts annual events, and disseminates data across the sector.

TIAA is led by a 12-member Board, with representatives from all the sectors that participate in tourism in Alberta. Sectors include Attraction & Events; Indigenous;

Travel Trade; Industry Associations; Meetings, Conventions & Incentive Travel; Retail; Transportation; Destination Marketing/Management Organizations; Accommodation; and Food & Beverage

Travel Alberta

Tourism Alberta is the Government of Alberta's destination management organization. They support business development, marketing, provide visitor services, and visitor access to and across Alberta.

Their previous 3-year plan (Bootstrap Plan) aimed to focus on three pillars; marketing, access, and place with a goal of helping Alberta's tourism related revenues recover to pre-pandemic levels, which was achieved in 2022.

The current 3-year Business Plan 2024-2027 (Wheels Up) has set a goal of achieving \$15 billion in annual visitor spending in 2027, which contributes to the provinces longer term goal of \$25 billion in annual visitor spending by 2035. The current plan is focused on increasing Alberta's visibility in key markets, improving access to and around the province, and supporting economic development and diversification to create experiences.

Their current annual report notes that "...the labour market will change and tighten significantly by 2035. The industry is likely to see a shortage of 178,000 workers by 2035. We will need a long-term solution to attract and retain workers to meet our sector goal."

Tourism HR Canada (THRC)

Based out of Toronto, THRC is a Canadian not for profit formed in 1993 to build a "world-leading tourism workforce". Their primary areas of analysis and program investment include:

- Skills, productivity, and job design
- Supply, attraction and retention
- Learner and labour mobility
- Labour market/human capital strategies
- Professional standards
- Employer investment in training
- Curriculum
- Quality assurance and program accreditation
- Policy
- Labour market adjustments

THRC should be viewed as a national leader in the areas of workforce related research. As an organization, they have the largest body of current, high-quality research on the state of the tourism workforce in Canada.

Under the brand of Emerit Consulting, THRC offers a series of services related to assessment, training certification and labour market analysis. The Canadian Academy of Travel and Tourism (CATT) offers free educational resources to introduce and promote tourism opportunities to high school students across Canada.

Destination Canada

Destination Canada is a Crown corporation owned by the Government of Canada, serving as Canada's national tourism marketing and research organization. It works in partnership with provinces, territories, and industry partners to promote Canada as a premier tourism destination internationally. The organization focuses on high-yield markets and uses data-driven marketing to attract leisure travelers and business events to Canada.

Conference Board of Canada (Future Skills Center)

The Conference Board of Canada (CBOC) is a not-for-profit applied research organization that was established in 1954. Their focus is on leadership, economic trends, public policy issues, and organizational performance. The Conference Board, in partnership with the Future Skills Center, has created a modeling tool called MOST (Model of Occupations, Skills, and Technology).

MOST is used to forecast occupations for each province and territory between 2015 and 2045.



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