

A person wearing a bright red jacket and dark pants stands on a snow-covered rock ledge, looking out over a winter landscape. Below them, a waterfall cascades over rocks, surrounded by snow and ice. The background is filled with snow-covered evergreen trees and a misty, mountainous horizon.

# Building Back Stronger 2021 Report to Members

Tourism Industry Association of Alberta (TIAA)



SOURCE: Kim Tinnis @kimtinnis (Muttart Conservatory, Edmonton)

#### TIAA Board of Directors (2021)

**Alisha Reynolds, Vice President**

Sandman Hotel Group  
Sector Represented: Member at Large

**Dan DeSantis, Area General Manager, Calgary**

Calgary Airport Marriott In-Terminal Hotel, Delta Hotels Calgary Airport In-Terminal, Westin Calgary Downtown  
Sector Represented: Accommodation

**Robin Locke, Vice President, Strategy & Corporate Development**

Lake Louise Ski Resort  
Sector Represented: Attractions & Events

**Jace Anderson, Executive Director**

Tourism Medicine Hat  
Sector Represented: Destination Marketing/Management Organizations

**Brett Ireland, CEO**

Bearhill Brewing  
Sector Represented: Retail

**Arlindo Gomes, Vice President, Venues**

Edmonton Convention Centre, Edmonton EXPO Centre  
Sector Represented: Meetings, Conventions & Incentive Travel (MCIT)

**James Overall, Dean, School of Hospitality and Tourism**

Southern Alberta Institute of Technology (SAIT)  
Sector Represented: Training and Education

**Stuart Back, Vice President, Operations**

PURSUIT Banff Jasper Collection  
Sector Represented: Travel Trade

**Dan Arndt, President**

ZZA Hospitality Group  
Sector Represented: Food and Beverage

**Lindsey Galloway, President & CEO**

Heritage Park Historical Village  
Sector Represented: Board Member at Large

**Ryan Robb, Chief Executive Officer\***

Stoney Tribal Administration  
Sector Represented: Indigenous

\*TIAA board until October 25, 2021

## Chair's message

Following our inaugural AGM, and in tandem with my appointment as Board Chair of TIAA, I promised that we would advocate, support, and actively pursue a path to reopen the economy as soon as it was safe to do so. It was a difficult time for our industry then, as we were wedged between Alberta's second and third waves of the pandemic, and hopeful that the end was in sight.

Now, as we close out 2021 with additional waves, challenges and strength under our belts, we truly are seeing the end, or maybe the beginning, of a new way of life. We have begun to see visitors return to our communities, the borders have reopened, the non-essential travel ban has been lifted, vaccines are available to those aged five and up, and a protocol has rolled out that helps keep the doors of businesses open. There is an enhanced sense of optimism, and we are all used to living on our toes, adapting quickly to changes, and remaining full of hope. That said, we know too well that some businesses did not make it through, others face enduring uncertainty and the pandemic has taken a toll on many people's personal lives.

But, through the ups and downs, TIAA has led with intention and funnelled its efforts to where it mattered most. This included clarifying measures for industry, influencing business supports from government, informing members during the federal election, increasing awareness about our labour situation, and collaborating with countless partners to ensure the voice of the visitor economy was strong and clear.

We look ahead through our recently approved two year business plan with confidence in the path laid out. Let's remain deliberate and united in our work to ensure we build back an optimal and sustainable visitor economy that is primed to take Alberta's tourism to new heights. We are grateful to all of you, and are committed to becoming stronger, together, always.



**Alisha Reynolds, Board Chair**  
Tourism Industry Association of Alberta (TIAA)



SOURCE: Leigh Stovall / iStockphoto.com (iStock)

# Advocacy

Over the last year, TIAA has worked with a determined fervour to ensure Alberta's visitor economy is positioned for recovery and growth. From generating awareness on issues and shaping policy options, to directly supporting members' business aims, TIAA is the visitor economy's strategic risk-management partner focused on the overall health of the visitor economy. Our chief aim is to move the province one step closer to its goal to double tourism revenues by 2030. What follows is a curated summary of just a few of TIAA's outreach efforts over the course of 2021.

## Advocating for the needs of tourism

- Red tape reduction:** eliminating regulations and administrative processes that impede business innovation and investment is key to advancing the growth of Alberta's visitor economy. In 2021, the Associate Minister Of Red Tape Reduction appointed TIAA's board chair (Alisha Reynolds) and board advisor (Darren Reeder) to co-chair the Tourism and Hospitality Red Tape Industry Panel. These leaders would help shape this agenda and priorities to support the needs of operators within Alberta's visitor economy.
- Federal recovery caucus:** TIAA met with several ministers to discuss needs through the lens of the federal tourism recovery plan, with a paramount focus on bringing the sector back to life and getting tourism workers back to their former jobs through the quick resumption of air travel.
- Federal official opposition:** TIAA presented to the Conservative Party of Canada's Tourism Caucus Recovery Committee with a focus on: ensuring the longevity of liquidity support measures until natural market forces resume; providing a predictive path to reopen the border to travel; supporting the recovery of Canada's visitor economy by introducing a travel tax credit; and, advancing policy solutions that provide a clear and sustainable path to immigration for those entering Canada's tourism industry.
- Standing Committee on Alberta's Economic Future:** TIAA presented the findings of its report on the value of Alberta's Outdoor Recreation economy on Crown Lands. A motion was made, and unanimously supported by the Committee, directing the ministry of Jobs, Economy and Innovation to implement all six of the report recommendations.
- Alberta Conservative Caucus:** as part of 2021 Tourism Week advocacy activities, TIAA outlined how Alberta's visitor economy had been impacted by the pandemic and key aims to get tourism back on track, including an expansion of the Small Medium Enterprise Relaunch Grant (SMERG) and introduction of a travel tax credit program to incentivize travel within Alberta.

## ALBERTA'S VISITOR ECONOMY

THE ECONOMIC SIGNIFICANCE OF TRAVEL IN ALBERTA

In Alberta, the visitor economy is literally "everyone's business". It is a complex, interwoven and dynamic ecosystem. We are an industry of industries, inclusive of all private and public businesses and service providers that support a visitor's trip. So when our sector, which was growing faster than the provincial economy, was abruptly halted by COVID-19, this sent shockwaves to the core of Albertans' way of life and their livelihoods. Below is a snapshot showing the contributions that tourism brought to Alberta's economy, our present state, and, still how far we have to go to recover.

**25,546**  
ALBERTA TOURISM  
BUSINESSES



**45.9%**  
BUSINESSES  
WITH EMPLOYEES



**54.1%**  
BUSINESSES  
WITHOUT EMPLOYEES

### PRE-COVID-19 PERFORMANCE

**\$8.2B\***  
2019  
EXPENDITURES

**\$105.1B**  
IMPACT OF CANADA'S  
TRAVEL SECTOR

**2.03%**  
TOURISM'S SHARE  
OF CANADA'S GDP

**\$23.1B\***  
CANADA'S LARGEST  
SERVICE EXPORT

### # OF BUSINESSES WITH EMPLOYEES



SECTOR	ACCOMMODATION	FOOD & BEVERAGE	RECREATION	TRANSPORTATION	TRAVEL SERVICES
<b>BUSINESS COUNT</b>	1,196	8,120	1,122	598	353
<b>% OF TOTAL</b>	11.0%	71.0%	10.0%	5.0%	3.0%

### COVID-19 ECONOMIC IMPACTS

**-91%**  
PASSENGER AIR  
TRANSPORT REVENUES

**-71%**  
ACCOMMODATION  
REVENUES

**65%**  
FOOD & BEVERAGE BUSINESSES  
OPERATING AT A LOSS

**-\$1.56B**  
ALBERTA ESTIMATED LOSSES IN  
INTERNATIONAL TRAVEL REVENUE

### PER PERSON VISITOR SPENDING IN ALBERTA

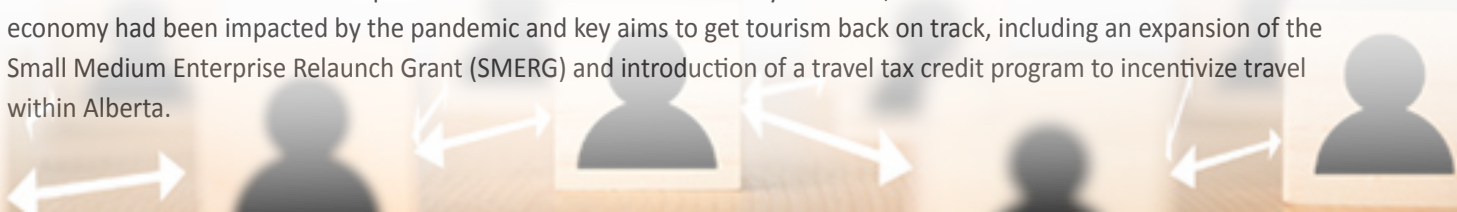


**\$157**  
Albertans

**\$471**  
Canadians

**\$900**  
Americans

**\$1180**  
Overseas



# Advocacy...cont'd

- TIAA Industry Associations Advisory Council (IAAC):** The objective of the Council is to inform an understanding of the policy, research and advocacy priorities of each of Alberta’s various tourism-oriented trade associations. Council meetings are opportunities for sector associations to advance new ideas and work through various policy and regulatory issues that impact sector performance. These meetings have facilitated opportunities for partner presentations on emerging issues, to receive policy and information updates from assistant deputy ministers, and, to consider areas of joint advocacy to support the aims of Alberta’s visitor economy.
- Provincial Territorial Tourism Industry Associations (PTTIA):** TIAA is a member of a coalition of provincial and territorial tourism industry associations that have met on nearly a bi-weekly basis over the course of the past 20 months. PTTIA has been instrumental in informing policy options at the national level that are responsive to industry needs and align to regional expectations. TIAA played an important role at this table in helping to advance the development of a national policy paper and policy plenary session at the TIAC Congress in Ottawa that tackled the timely issue of labour challenges facing tourism’s recovery.
- Tourism & hospitality roundtables with the Government of Alberta:** TIAA participated on frequent calls with various ministers and senior staff from Jobs, Economy & Innovation and Alberta Health to clarify COVID-19 health and safety measures, to discuss interpretation of protocols, and, to offer suggested improvements that provided greater predictability for business operators.
- Sector specific advocacy supports:** TIAA worked collaboratively with a variety of sector associations to champion issues key to their members’ business survival - issues such as supporting the abatement of the Alberta Tourism Levy, extensions of temporary layoff notices, extensions of the Canada Emergency Wage Subsidy program, and others. TIAA also worked proactively on behalf of a number of smaller industry segments that were not supported through their own direct sector association.

“Our goal right now is to see Indigenous tourism in the province rebound to pre-COVID numbers and we know there is incredible demand. Sitting at the table of TIAA’s Industry Associations Advisory Council has helped us have direct conversations with government so we can articulate what is needed to achieve this goal. It’s an important time for Indigenous tourism in Alberta, and we appreciate having TIAA in place for a whole of the visitor economy perspective, as we work toward our common aims.”

Shae Bird, CEO  
Indigenous Tourism Alberta

## Risk factors informing TIAA’s 2021 business activities

COVID-19 RISK REGISTER		2020	2021
	<b>BUSINESS LIQUIDITY</b> Sustained fiscal stimulus supports remain in place until the market returns to near pre-COVID-19 levels	EXTREME	EXTREME
	<b>PREDICTABLE MARKET ACCESS</b> Standardized health and safety protocols, guidance for businesses & visitors, introduction of travel bubbles	EXTREME	EXTREME
	<b>VIABILITY OF AIRPORTS &amp; AIRLINES</b> Liquidity, route viability, federal fees re: air travel costs, security & nav. fees, excise tax on fuel, etc.	EXTREME	EXTREME
	<b>HEALTH &amp; SAFETY PROTOCOLS</b> Ongoing business measures/investments to ensure health and safety of workers, visitors and members of the community	EXTREME	HIGH
	<b>COVID-19 SPIKES</b> Business and workforce resilience in the face of the possible shut-down of the economy (eg. by region, sector, etc.)	EXTREME	HIGH

# Growing Alberta's tourism & recreation potential

## Alberta's Crown Land Outdoor Recreation Economy Study

Alberta's Crown lands have long been recognized for the economic contribution they support through activities such as oil and gas, mining, grazing, and forestry. By contrast, the importance of these lands in supporting and growing a robust tourism and outdoor recreation economy has largely been overlooked. Instead, outdoor recreation is most often viewed as an activity that 'just happens' and one that simply needs to be managed.

To better understand the prospective sustainable, outdoor recreation opportunities on Alberta Crown lands and how these can contribute to the diversification of Alberta's visitor economy, TIAA conducted Alberta's Crown Land Outdoor Recreation Economy study. This was the first study of its kind to focus comprehensively on the entire outdoor motorized and non-motorized recreation ecosystem.

This research was informed through the guidance of TIAA's Outdoor Recreation Project Advisory Panel, consisting of 20 cross-sectoral, outdoor recreation stakeholder organizations. These organizations assisted immensely in the research phase as well as the distribution of the survey tool to ensure a wide reach of Albertans were offered the chance to participate.

The study advanced six specific recommendations to help government to unlock the potential of the outdoor recreation economy. These include: • developing a coordinated & unified outdoor voice, • constructing supportive Crown land policy, • investment in new and renewal of existing outdoor recreation infrastructure, • inventorying of Crown Land outdoor recreation resources, • measuring and monitoring the outdoor recreation economy, and, • creating an Office of Outdoor Recreation.

## Contribution of Alberta's Crown Land Outdoor Recreation Economy

**\$2.3B**

SPENDING BY ALBERTANS ON TRIP-RELATED EXPENDITURES

**\$258**

PER DAY TRIP

**\$757**

PER OVERNIGHT TRIP

### OUTDOOR RECREATION IS A POWERFUL ECONOMIC DRIVER

**\$2.8B**  
GDP

**0.8%**  
OF ALBERTA GDP

**\$551M**  
TAX REVENUE

**1.5%**  
OF TOTAL ALBERTA  
EMPLOYMENT

**36,000**  
FULL-TIME  
EQUIVALENT JOBS

### ALBERTANS ARE PASSIONATE AND ACTIVE OUTDOOR ENTHUSIASTS

**3.46**  
AVERAGE NIGHTS  
PER OVERNIGHT VISIT

**33%**  
OF ALL OUTDOOR RECREATION  
TRIPS BY ALBERTANS OCCUR  
ON PUBLIC LANDS

**\$376M**  
IN EQUIPMENT AND  
ACCESSORY EXPENDITURES  
(EG. EQUIPMENT, APPAREL)

**\$10,282**  
AVERAGE ANNUAL  
HOUSEHOLD SPEND  
ON EQUIPMENT AND  
ACCESSORIES APPAREL

# Growing Alberta's tourism & recreation potential...cont'd

## Sub-regional planning for caribou & ensuring tourism interests are represented

In 2019, the province announced the creation of three caribou sub-regional task forces with an intention to 'advance multi-species conservation and provide lands for economic opportunities, recreational pursuits and other societal interests.' Through TIAA, the tourism industry was able to secure one spot on each of the following task forces to ensure the interests of tourism were balanced with other economic and societal interests: West-Central Caribou Sub-regional Task Force (Berland Planning Area), Northeast Caribou Sub-regional Task Force (Wandering River Planning Area), and Northwest Caribou Sub-regional Task Force (Chinchaga Planning Area).

## Bill 79, Trails Act

The proposed legislation clarifies that the Government of Alberta is in the outdoor recreation and trails business and it will support Albertans' ability to connect with nature and outdoor experiences. The legislation also legitimizes trails as an asset on the public land base (eg. outside of provincial parks). While details will likely be confirmed in the supporting regulations, notionally the Act would ensure trails are considered more in tandem with other land use planning activities. The recognition of trails as a provincial asset would help signal that the province is in the business of advancing tourism and recreation asset and experience development.

"Working in partnership with the Tourism Industry Association of Alberta to understand and respond to the needs of businesses boosts our collective ability to drive recovery and long-term sustainable growth for Alberta's visitor economy."

David Goldstein, CEO  
Travel Alberta

## Other notable issues and bills

- **National Insurance Taskforce** - TIAA participated as a member of a national taskforce looking at commercial insurance access issues, premium increase impacts, and limited liability coverage availability to many tourism operators. A national survey was conducted and a detailed research project is under consideration.
- **Labour shortages** - TIAA actively advocated for policy and financial supports (eg. training grants, upskilling supports) that would enable tourism businesses to quickly respond to growing visitor demand as Alberta moves closer to an endemic state.

## Provincial and federal bills TIAA is currently monitoring

- **Bill 73** - Infrastructure Accountability Act
- **Bill 76** - Captive Insurance Companies Act
- **Bill 80** - Red Tape Reduction Implementation Act, 2021 (No. 2)
- **Bill 219** - Workers' Compensation (Expanding Presumptive Coverage) Amendment Act, 2021
- **Bill C-2** - An Act to provide further support in response to COVID-19

# Collaboration

## Coalition of Hardest Hit Businesses (CHHB)

TIAA has participated as a member of the national CHHB advocacy effort, an industry-driven coalition that represents businesses (and associations) in the tourism, travel, arts and culture, events and festivals, motor coach, accommodations and hospitality, and Indigenous tourism experiences sectors. Understanding that tourism had been the hardest hit industry and the last to recover from the impacts of the pandemic, the CHHB has led a series of campaigns calling on tailored supports for those industry segments that will struggle to make it through to 2022.



## Faster Together

Faster Together is national effort that formed to combat vaccine hesitancy and included major industry and sector organizations, businesses and individuals. TIAA was an early member and brought in other tourism leaders to help advance a positive and data driven narrative to motivate more people get vaccinated. In addition to the health and safety of the Canadian public, this was a strategy to enhance the stability of Canada's business environment.



## Tourism Week

In the spring of 2021, TIAA facilitated a Tourism Town Hall alongside TIAC, Destination Canada and other tourism partners, allowing tourism operators to provide first-hand input on issues and feedback on government policy for the recovery and rebuilding of the sector. This was bundled against numerous TIAA-led activities including a letter campaign, prepared resources with key messages, and the development of tourism impact sheets differentiated by provincial and federal ridings for members. These combined efforts resulted in substantial earned media and a unique opportunity for TIAA to host a live industry engagement session with the provincial government's caucus.



“Ours is a people business and people in tourism and hospitality need a strong voice. The sector's efforts are better represented now with TIAA in a leadership position, and it wasn't a moment too soon that the association was formed. When I reflect back on TIAA's work this past year, their results during Tourism Week stand out. Their ability to grow awareness of our industry in the media and with government blew me away. They took the conversation around the issues Alberta tourism operators are facing to a whole new level.”

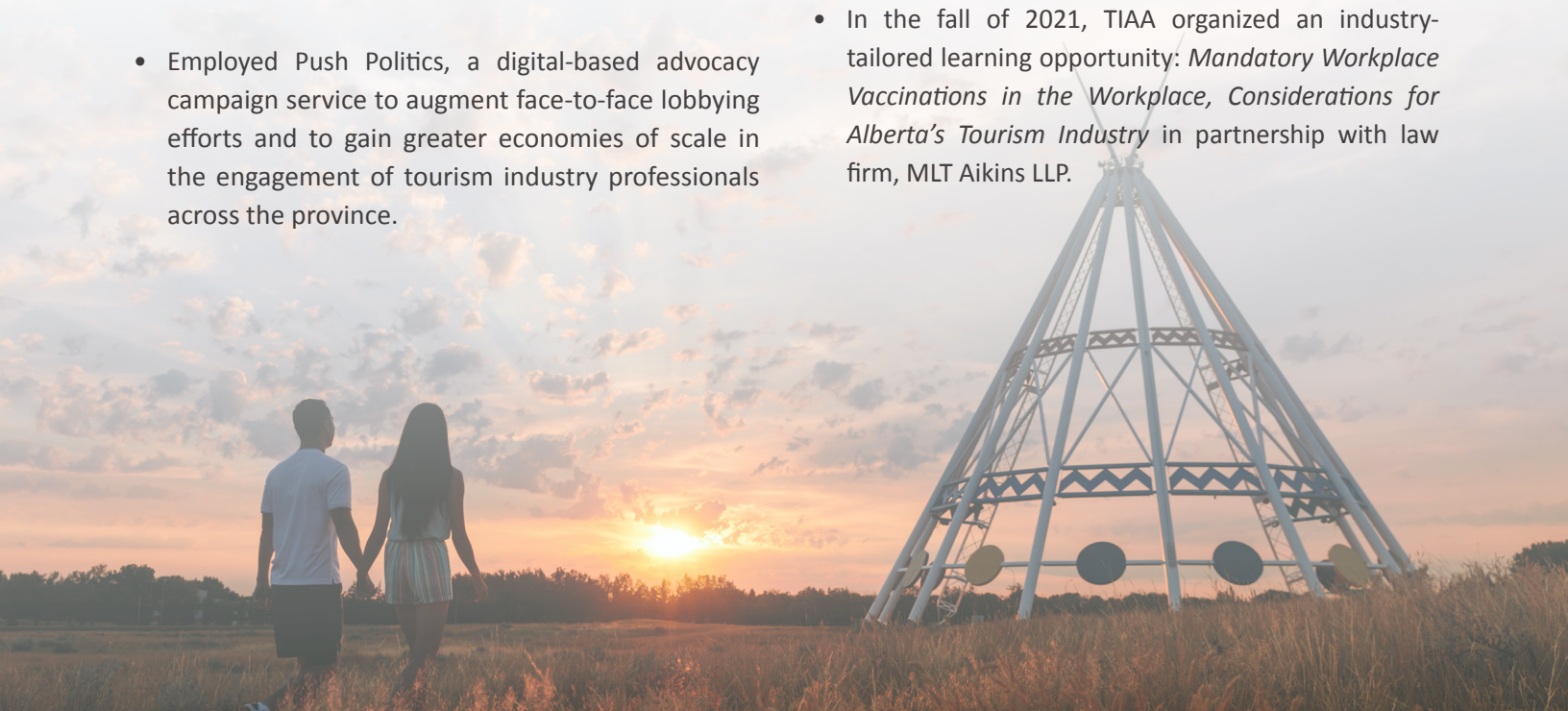
Jace Anderson, Executive Director  
Tourism Medicine Hat



# Communications and engagement

With as much partnering and collaboration as TIAA undertook in 2021, it put a heightened focus on communications and engagement. This required the intake of information to understand the needs of industry, the practicalities or limitations of recovery supports, and insights into how the business of tourism in Alberta was going. In addition, increasing awareness of TIAA's research findings, government announcements, and the state of the industry required the organization to invest more into this critical function. The following offers a snapshot of some related activities:

- Created an annual schedule of planned content that commemorates milestones (and dates of importance) to the tourism industry, such as: the National Day of Truth and Reconciliation, Earth Day, National Small Business Week, etc.
- Developed and distributed federal election resources that helped familiarize elected officials on tourism issues. This included briefing materials such as candidate snapshots, tourism impact sheets for all 34 Alberta federal ridings, and an overview of the platforms for each party.
- Quickly responded to a continuous flow of information during the COVID-19 pandemic by soliciting industry input, policy and advocacy insights, government policy and regulatory announcements and knowledge sharing through TIAA's industry newsletter, published approximately 2-3 times per month.
- Employed Push Politics, a digital-based advocacy campaign service to augment face-to-face lobbying efforts and to gain greater economies of scale in the engagement of tourism industry professionals across the province.
- Used LinkedIn as the association's primary business communication channel to relay breaking news, celebrate industry wins, and gain industry feedback.
- Grew the utility of TIAA's website with timely updates, enhanced widget integration and other tools to help reach a wider audience, such as: template-based letter campaigns that auto-populated information for elected officials, based on the author's location.
- Developed and distributed provincial riding tourism impact sheets demonstrating the impact and contribution of Alberta's visitor economy for each of the province's 87 MLAs.
- Provided one-on-one legislative support and guidance to members requiring assistance with navigation of government policies and regulations.
- In the fall of 2021, TIAA organized an industry-tailored learning opportunity: *Mandatory Workplace Vaccinations in the Workplace, Considerations for Alberta's Tourism Industry* in partnership with law firm, MLT Aikins LLP.



# Going Forward

TIAA closes the year-out with a renewed sense of optimism. While this doesn't mean all challenges of managing through a pandemic are behind us, we believe the systems and protocols currently in place are working and will should certainly assist the province (and the entire country) in beginning to manage toward an endemic state of affairs.

For those who have supported TIAA over the past year, we have greatly appreciated your support and partnership. Having such a wide cross-section of industry partners has certainly emboldened our advocacy and communication messaging to the Government of Alberta and we will continue to build on this success in 2022. If you're not yet a TIAA member, we would be pleased to welcome you and explain the benefits of belonging to Alberta's only association that spans all segments of the visitor economy.



## On deck for 2022

- **Annual Business Conditions & Performance Survey:** TIAA will launch an annual business conditions survey to better understand the strategic, operational and profit-margin issues that businesses must contend with in the current environment.
- **State of the Industry Report:** TIAA will present a forward-looking report at the Alberta Tourism Industry Congress that will help shape industry advocacy priorities for the year.
- **Data Insights & Analysis:** TIAA will be working with Travel Alberta on a data insights project that will aggregate the insights that industry partners need to better plan and forecast.
- **Alberta Tourism Industry Congress:** being co-produced by TIAA and Travel Alberta, April 24-25, 2022, Fairmont Banff Springs Hotel.
- **Tourism Advocacy Day & Dinner with Government Caucus:** a full day of tourism partner advocacy meetings in Edmonton followed by a dinner with government caucus.

## TIAA Administration

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