

REIMAGINING TOURISM IN ALBERTA

A STRATEGIC EXPORT COMMODITY, DRIVER OF ECONOMIC
GROWTH AND TRADE DIVERSIFICATION TOOL

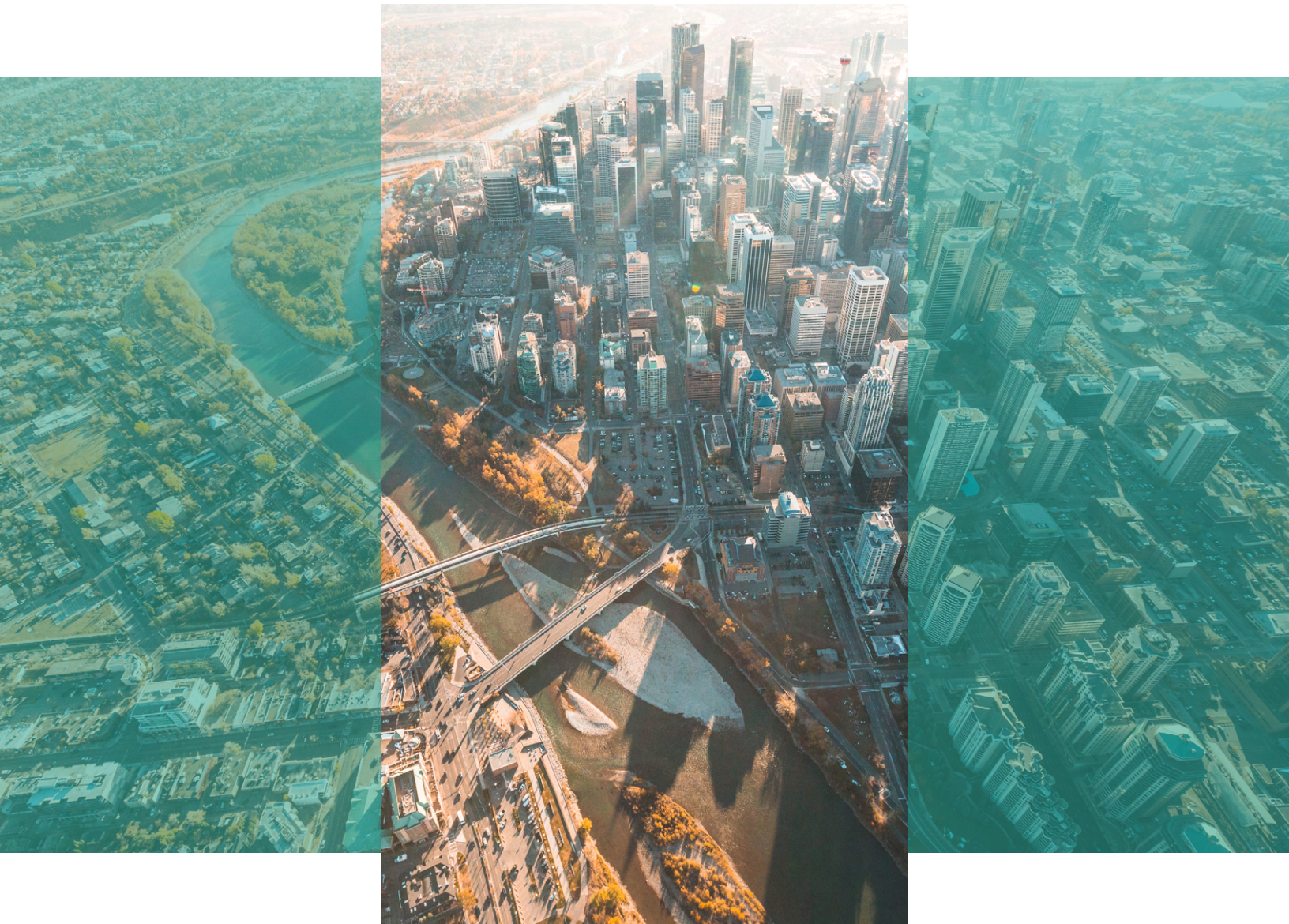


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EXECUTIVE SUMMARY

Alberta stands at a pivotal juncture in its economic evolution. As global markets fragment, trade protectionism rises, and geopolitical realignments accelerate, Alberta must retool its traditional export model to ensure greater resilience, diversification, and long-term value for Albertans.

Within this context, tourism should come to be recognized as one of the strongest catalysts to supporting Alberta's overall export development potential: a complementary tool to support the development aims of other commodity and services exports, and engine capable of encouraging international trade, investment and the province's overall reputational aims.

Tourism already generates over \$3.5 billion in international visitor spending, making it Alberta's fourth-largest export by value, ahead of cattle, wheat and wood. **In fact, tourism is the most valuable Alberta export next to oil, gas and petroleum: it too should be considered with the economic consequentiality afforded to the province's other key export sectors.**

Unlike other exports, tourism revenue is geographically diversified - just 54% is tied to the U.S., compared to 90% of Alberta's overall exports - making it a strategic hedge against single market overdependence.

Tourism also serves as a gateway to Alberta's food, energy, Indigenous, and cultural exports, while supporting global talent attraction, event hosting, and international partnerships. However, Alberta's policy and regulatory framework is not currently structured to optimize tourism as an economic strategy, nor is there a formal, inter-ministerial or cross-sectoral structure that exists to coordinate tourism policy, investment, infrastructure, nor skills development.

With rapidly evolving geopolitical conditions around the world, Alberta's ambitious tourism spending goal of \$25 billion by 2035 is at increasing risk, especially given limited year-round product and experience capacity, and over-subscribed demand during the peak summer season relative to other seasons of the year.

To unlock tourism's full economic and diplomatic potential, Alberta must elevate its understanding of what tourism is and what it contributes - away from being seen as just a service industry to a strategic export: an instrument for economic growth and trade diversification priority that can be unlocked through targeted investments, stronger governance, and international integration.

This report outlines a set of actionable steps to achieve that goal.



Travel Alberta, Chris Amat @christopheramat

Key Government Actions to Elevate Tourism as a Strategic Export Commodity, Driver of Economic growth and Trade Diversification Tool

ACTION	PURPOSE	TARGET OUTCOME
1. Establish an Inter-Ministerial Committee on Tourism (IMCT) reporting to the Premier	Coordinate policy across housing, transport, trade, health, infrastructure, economic development, workforce, finance, international relations and immigration	Whole-of-government alignment on tourism investment, regulation, and infrastructure, incorporating multiple objectives including FDI growth, rural economic development and improved health benefits
2. Leverage industry expertise by consulting with TIAA's Tourism Industry Associations Advisory Council of CEOs on strategic budget and policy considerations	Embed industry expertise into tourism policy, budget strategy development	Evidence-based decision-making informed by industry realities and growth opportunities
3. Prioritize Foreign Direct Investment (FDI) Attraction and Geopolitical Alignment in Tourism Outreach Efforts	Prioritize Free Trade Agreement countries to deepen tourism relations to support FDI attraction and geopolitical alignment to maximize the economic value of Alberta's tourism strategy.	Tourism's role in broadening the scope of Alberta's trade relations, strengthened diplomacy and attracting FDI with key trade partners. Alberta should set a goal to double tourism's proportion of FDI by 2030
4. Increase investment in Travel Alberta's Efforts to Expand and Diversify Alberta's Tourism Offerings	Travel Alberta is well positioned to attract investment in tourism amenities and attract visitors. It needs additional fiscal capacity to scale its efforts meaningfully across the province	Expanded tourism product offerings to draw more visitors to new areas and during off-peak times
5. Embed Alberta's Economic Sectors in Tourism Offerings	Alberta is a world leader in many aspects of our economy. We are renowned for our ingenuity, innovation, sustainability and natural environment.	Enhanced visitor value proposition by promoting the tourism aspects of every industry to visitor markets.



1 INTRODUCTION: GROWING ALBERTA'S TOURISM ECONOMY

In recent years, tourism has increasingly been prioritized by the province as an economic growth sector. Through its *Higher Ground Tourism Sector Strategy*, the province set an ambitious goal of growing tourism expenditures to \$25 billion by 2035.¹ The industry has experienced positive growth since the pandemic with total visitor expenditures exceeding \$14.4 billion in 2024 – an increase of nearly \$4 billion since 2022.

While the increased spending is encouraging and a testament to the commitment of the province to grow the industry, its full potential as a tool for economic diversification remains untapped and under-appreciated.

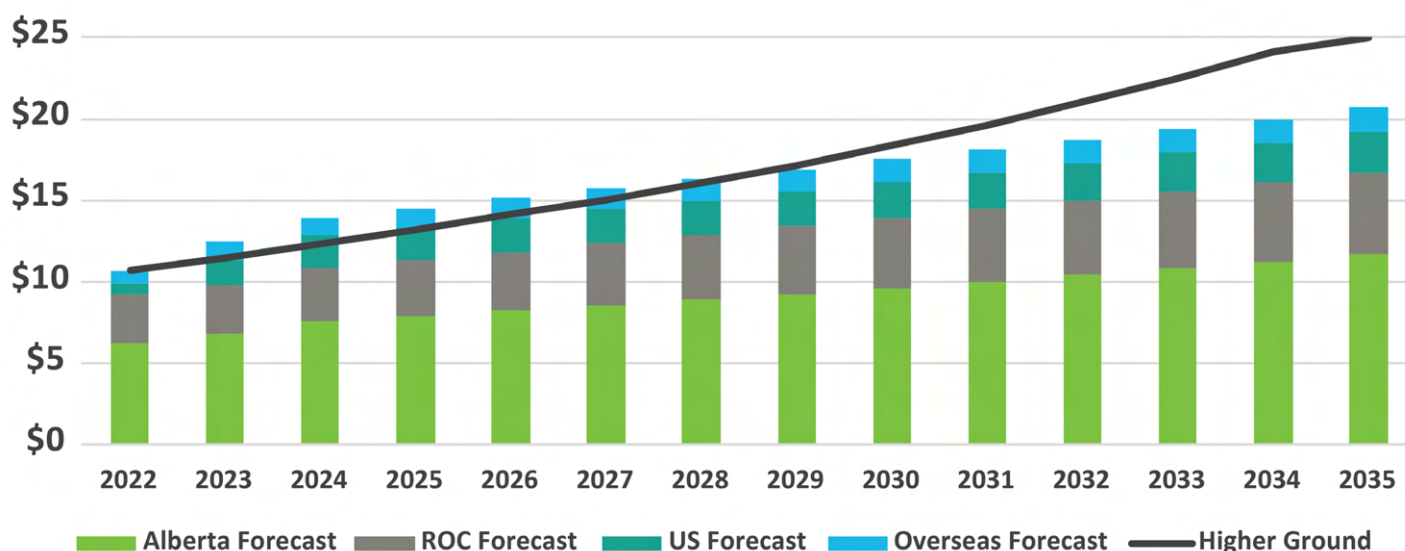
The recent increase in tourism spending can largely be attributed to:

- Rebuilding and prioritizing air access, which has reconnected key markets and enabled renewed visitor flows post-pandemic;

- Aligning marketing efforts nationally and provincially, which has elevated national visibility and encouraged domestic travel in the face of US trade protectionism;
- Increased provincial resources for Travel Alberta to support destination marketing and development;
- Investments in new attractions and product offerings;
- A favourable exchange rate for U.S. visitors; and
- Early signs of visitor dispersion beyond Alberta's legacy tourism markets.

The potential to drive further revenue growth from these levers, however, is diminishing, as existing capacity is absorbed and marginal gains become harder to achieve in the rapidly unfolding geopolitical and economic climate. Figure 1 presents the tourism spending forecast by visitor type based on current trends and conditions.

Figure 1: Tourism Spending Forecast



¹ Government of Alberta. 2024. Higher Ground: A Tourism Sector Strategy. Amplifying the Alberta Advantage for the Visitor Economy. P. 4. Accessed at: <https://open.alberta.ca/publications/higher-ground-tourism-sector-strategy#:~:text=The%20strategy%20focuses%20on%20five,visitor%20economy%20reaches%20new%20heights>

The province has experienced higher than expected success in terms of tourism spending growth in 2023 and 2024, however, it is expected that these growth rates will not continue into the future without further policy enablement, and the additional investment that will help catalyze private sector risk-takers to build new, world-class products and experiences. Specifically, U.S. and overseas visitor expenditures grew by 70% and 24% over these two years – largely linked to continued recovery and growth post-pandemic. Comparatively, Alberta and the rest of Canada (ROC) visitor spending grew by 10% and 6% respectively.

At present, a structural challenge undermining Alberta’s growth potential is its limited and seasonal capacity for hosting additional visitors, which is largely located in the legacy markets of Calgary, Edmonton and the Rockies.

It is simply not realistic to expect that these growth rates will continue unabated if industry capacity is not expanded. Moreover, evolving global dynamics related to US tariffs and economic protectionism,

and increased militarization in the face of geopolitical conflict present both a challenge and opportunity to reposition and reprioritize the industry in Canada and Alberta.

The province’s goal for tourism growth, as presented in the *Higher Ground* Tourism Strategy, is likely to fall short of its visitor spending targets unless added policy and investment-focused measures are undertaken to diversify visitor markets, extend/expand the tourism season in the province and build out the product offering and capacity of industry in and beyond traditional tourism markets.

What we need is a reframing of the tourism industry in Alberta – one that seeks to reposition the role of the industry as a leading export, a hedge against single market risk and gateway to foreign direct investment (FDI) and trade.



2 A STRATEGIC EXPORT AND INVESTMENT SECTOR

The tourism industry is a strategic positioning asset that touches virtually every dimension of Alberta's economy and strengthens its ability to develop long-term export markets for the province's many product and service exports. It has the potential to deliver jobs, build Alberta's global reputation, and support trade, investment, talent attraction and diplomatic linkages.

According to the Tourism Institute:

"Tourism is not just about leisure and travel—it's an essential tool for governments around the world to influence global relations, boost their economies, and project soft power. Whether through promoting inbound or outbound tourism, using it for image building, or employing it as a political lever in international negotiations, tourism is intricately tied to political strategy. As the world continues to globalize, the intersection of tourism and politics will only become more significant, and its impact on global diplomacy will continue to evolve."²

There are significant benefits that can be realized in more fully integrating tourism into provincial decision-making, including deepening and diversifying trade relations, enhancing existing economic sectors, increasing productivity, and expanding economic development.

Nations from New Zealand to Ireland to Norway have built tourism into their trade and diplomacy strategies, embedding it in economic ministries and inter-agency task forces.

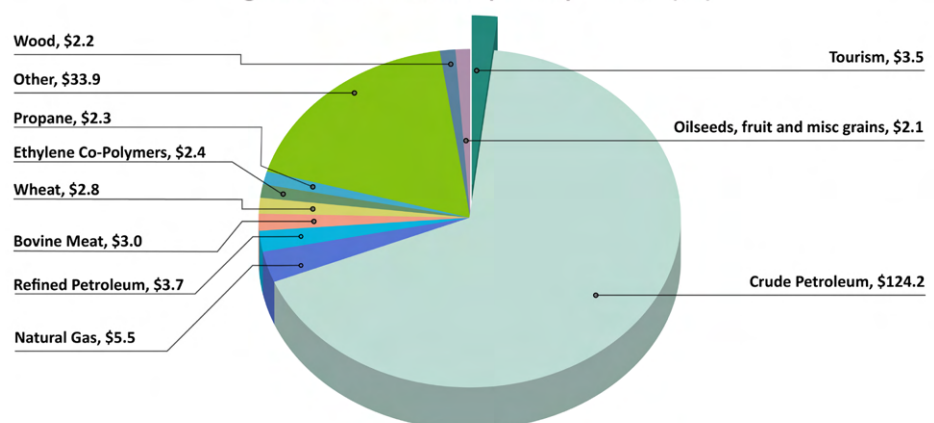
Alberta has the opportunity to show bold leadership here on behalf of Canada. But, without sufficient investment and integrated policy support to drive new product offerings and extend the visitation season, the simple truth is: tourism-spending will plateau as global competition for travellers continues to intensify.

2.1 TOURISM AS AN EXPORT COMMODITY

Tourism is too often viewed as a domestic services-supporting sector: an industry that supports local community vibrancy, but whose contributions to the economy and job creation are often poorly understood and not seriously regarded. In reality its true growth potential is as an export industry, fueling the province's ambitions to further diversify Alberta's international trading framework. Attracting tourists from other countries is the equivalent of selling goods to foreign consumers, which improves the country's balance of trade, strengthening the Canadian dollar and, correspondingly, the purchasing power of Canadians.

When looked at through the lens of its "export" value, international tourism expenditures in Alberta represent the fourth largest export product by value – exceeding \$3.5 billion in 2024.³⁴ This is higher than cattle (\$3B), wheat (\$2.8B), wood (\$2.2B) but lower than crude oil (\$124B), natural gas (\$5.5B) and refined petroleum (\$3.7B) (Figure 2).⁵ Through this lens tourism is the most valuable Alberta export next to oil, gas and petroleum, yet it has never been prioritized for its economic diversification potential.

Figure 2: 2024 Alberta Exports by Product (\$B)



²The Tourism Institute. 2024. The Power Play: How Countries Use Tourism as a Political Instrument. January. Available at: https://thetourism.institute/tourism-impacts/countries-using-tourism-political-instrument/#google_vignette

³Travel Alberta. 2025. Visitor Spend. Available at: <https://industry.travelalberta.com/research/tourism-indicators/visitor-spend>

⁴2024 International tourism spending in Alberta was ~\$3.5B Rest of Canada tourism spending in Alberta was \$3.2B. Spending by Albertans was \$7.6B.

⁵Export Alberta. 2025. Export Tool. Available at: <https://export.alberta.ca/export-tool/#&product=&industry=&market=ALL®ion=&year=2024&traderegion=&usSta te=¤cy=CAD&importExport=albertaexport&dataType=value&vue=0&aebpcHSLevel=4&aebpcChartType=list>

2.2 ATTRACTING FOREIGN DIRECT INVESTMENT (FDI)

Tourism is also a proven driver of FDI, as there is a strong linkage between international visitor spending and growth in foreign investment. According to a 2025 Deloitte study commissioned by Travel Alberta, a \$1 billion increase in tourism spending in Canada creates \$1.26 billion in GDP.⁶

While this is a compelling contribution, the report also finds that Alberta’s tourism GDP and FDI levels are well below our peers (Table 1). Only 0.9% of Canada’s FDI is tourism related with 1.8% of provincial GDP. Tourism GDP in comparative jurisdictions such as Ireland Australia and New Zealand is much higher. In the context of the ambitious tourism aims of these countries and the province’s own \$25B tourism growth target, Alberta should seek to at least double its Tourism FDI as a share of total FDI by 2030.

Table 1: Comparative Tourism Metrics by Country

Country	Tourism as a % of GDP	Tourism FDI as a share of Total FDI
New Zealand	4.4%	6.7%
Ireland	4.4%	2.3%
Australia	2.9%	1.1%
Canada	1.8%	0.9%

Source: Deloitte 2025.



Mike Seehagel @mikeseehagel

⁶Deloitte. 2025. Tourism’s Impact on the Economy.

2.3 DEEPENING AND DIVERSIFYING TRADE RELATIONS

One of the most compelling and tangible opportunities for stronger integration of tourism into government policy is through diversifying and deepening trade relationships. Alberta is significantly beholden to the U.S. as the recipient of 90% of the value of our exports (Figure 3).

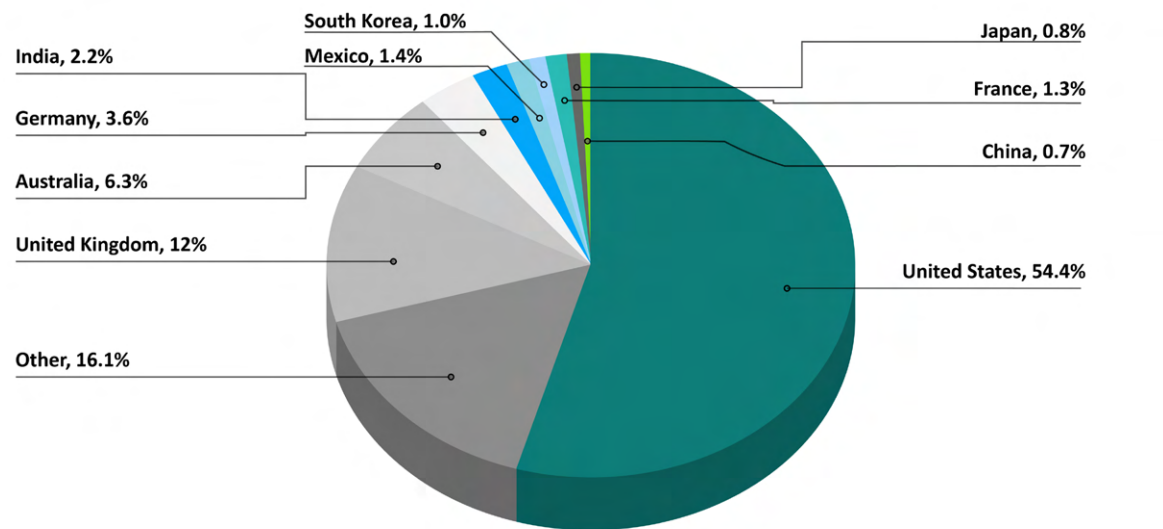
While Alberta’s tourism industry remains highly dependent on the US market, it is currently one of the more diversified of Alberta’s export sectors, with the U.S. representing just over 54% of international visitor expenditures (Figure 4).

Figure 3: 2024 Alberta Export Value by Country (\$Billion)



Source: Export Alberta

Figure 4: 2023 Alberta Visitor Spend by Source Country



Source: Statistics Canada Table 24-10-0047-01. Note this data table has become archived.

In the face of the new hostile US trading policies, tourism can serve as a bridge to build and expand trade relations and attract investment with strategic partners. Travel Alberta, the government’s destination marketing and development agency, continually assesses new and existing visitor markets to identify market growth and prioritization opportunities.⁷

The agency has identified priority countries to expand visitor markets (Figure 5).



Figure 5: Travel Alberta 2025 Market Priorities

TRAVEL ALBERTA MARKETS OF FOCUS	MARKET	DESTINATION CANADA	TA REPS & AGENCIES	ALBERTA GOV'T SUPPORT	ALBERTA DMOs
	UNITED STATES 				
	UNITED KINGDOM 				
	GERMANY 				
	FRANCE 				
	SOUTH KOREA 				
	MEXICO 				
	AUSTRALIA				
	CHINA				
	NETHERLANDS				
	JAPAN 				
	ITALY				

As Travel Alberta and the Alberta government continue to evolve their approach towards evaluating and prioritizing visitor markets, strategic consideration could be given to applying a greater focus on broader trade and investment relationships and geopolitics as a means to better integrate FDI attraction and strategic diplomacy into tourism market growth priorities.

The Alberta government has recently prioritized “diversifying Alberta’s export markets and attracting foreign direct investment through successful missions to Asia, the Middle East, and Latin America.”⁸ There could be an opportunity for greater alignment between Travel Alberta and the Alberta government to achieve this objective.

⁷Travel Alberta Market Analysis. 2025. Key indicators include: current and future air seats, visitor spend, market size, trip purpose (e.g. business, leisure, visit friends and relatives), long haul market share, economic outlook, visa processing times, and priorities of partner agencies such as Destination Canada.
⁸Government of Alberta. 2025. Deputy Minister of Intergovernmental and International Relations Mandate Letter. Available at: <https://open.alberta.ca/dataset/b0769b96-7a45-40b5-b57c-415ff82aca49/resource/2d7d3470-5552-4710-b183-e8efc36f15a/download/exc-mandate-letter-executive-council-2025.pdf>

Another potential opportunity lies in Canada’s free trade agreement (FTA) countries. Canada has 15 active FTAs, giving it favourable access to 51 countries.⁹ In 2024, the value of Canada’s trade reached \$1.5 trillion, of which 85% was exchanged with FTA countries.¹⁰

FTAs lead to substantial growth in two-way trade following their implementation. Notably, Global Affairs Canada estimates that FTAs doubled the amount of trade flows between Canada and the FTA countries after implementation.¹¹

The federal government has already signalled its interest in prioritizing trade with existing FTA countries through, for example, determining exemptions from its steel quota countermeasures in response to U.S. Tariffs.¹²

The greatest trade and investment opportunities are likely found in the more recently executed trade agreements, such as the 2018 Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the 2017 Canada-European Union Comprehensive Economic and Trade Agreement (CETA) (including the UK in 2021), and the 2020 Canada-United States-Mexico Agreement (CUSMA). The FTA countries in each of these agreements are included below (Table 2).¹³



Table 2: Canada Free Trade Agreement by Country	
FTA	COUNTRIES
2018 Comprehensive and Progressive Agreement for Trans-Pacific Partnership	Australia, Brunei, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore and Vietnam
2017 Canada-European Union Comprehensive Economic and Trade Agreement	Austria, Belgium , Bulgaria , Croatia , Cyprus, Czechia , Denmark , Estonia , Finland , France , Germany , Greece , Hungary , Ireland , Italy , Latvia , Lithuania , Luxembourg , Malta, Netherlands , Poland , Portugal , Romania , Slovakia , Slovenia , Spain , Sweden
2020 CUSMA	United States , Mexico
Other	Chile (1997), Colombia (2011), Costa Rica (2002), European Free Trade Association (EFTA) (2009): Iceland , Liechtenstein, Norway , Switzerland, Honduras (2014), Israel (1997), Jordan (2012), Panama (2013), Peru (2009), South Korea (2015), Ukraine (2017), United Kingdom (2021),

*Bold are NATO members

⁹ Canada’s international trade and investment agreements. 2025. Available at: <https://international.canada.ca/en/global-affairs/services/trade/agreements-negotiations/investment-agreements>

¹⁰ Fun with Data. Canada Facts. How many free trade agreements does Canada have? Available at: <https://www.funwithdata.ca/canada-facts/economy/how-many-free-trade-agreements-does-canada-have#:~:text=Canada%20has%2015%20active%20free,trade%20deals%20involving%20multiple%20countries>

¹¹ Government of Canada. 2025. Canada’s Free Trade Agreements. 2025. Available at: <https://international.canada.ca/international-canada/assets/pdfs/global-affairs/campaigns/diversifying-trade/fta-campaign-en.pdf>

¹² Finance Canada. 2025. Canada bolsters its measures to protect Canadian steel and aluminum workers and industries. June. Available at: <https://www.canada.ca/en/department-finance/news/2025/06/canada-bolsters-its-measures-to-protect-canadian-steel-and-aluminum-workers-and-industries.html>

¹³ Source: Government of Canada. 2025, available at: [Canada’s international trade and investment agreements](#)

As Travel Alberta and the Alberta government continue to evolve their approach towards evaluating and prioritizing international visitor markets, consideration could be given to leveraging our FTA country trade and investment relationships to better integrate FDI attraction and strategic diplomacy into tourism market growth priorities.

2.4 EXPANDING THE VISITOR SEASON AND PRODUCT OFFERING

Government traditionally invests public funding to support and stimulate economic activity across many sectors in the economy, including oil and gas, agriculture, forestry, value-added agriculture, film and economic development.

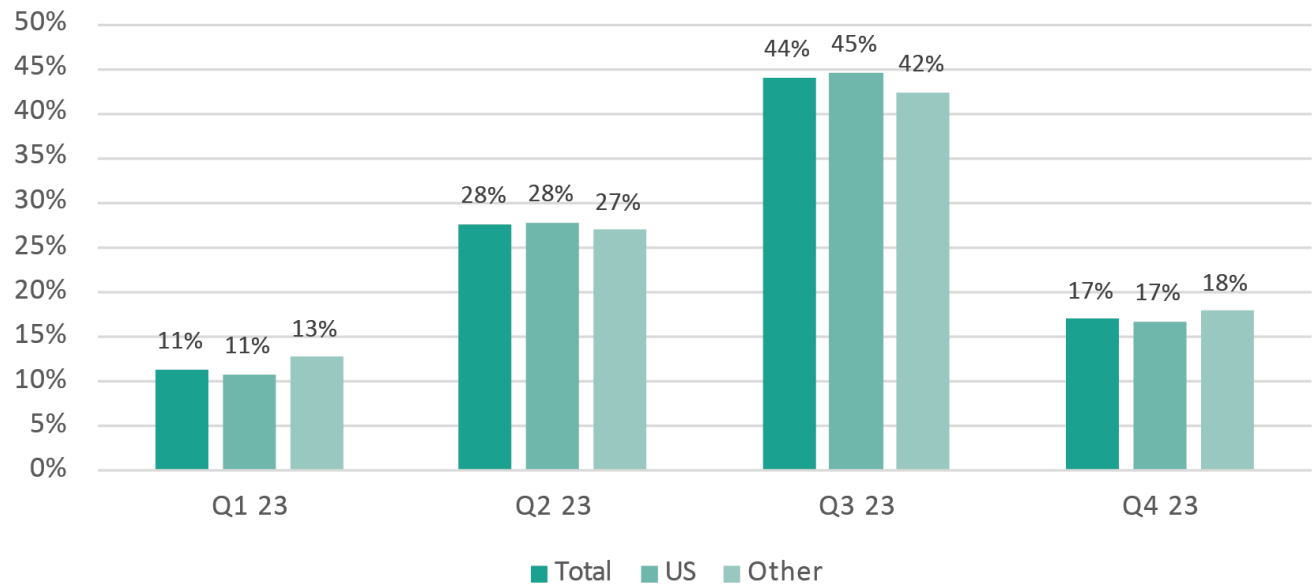
However, tourism offers significant comparative value relative to other sectors of the economy. As the Tourism Industry Association of Alberta (TIAA) has stated in earlier reports, for every job in the tourism industry, the government spends approximately \$3,100 of taxpayer resources to help stimulate local economic activity and create the conditions that help provide a predictable supply of future tax revenue. Comparatively, the government spends approx.

\$21,400 per job in agriculture, \$54,500 per job in forestry and \$7,200 per job in oil and gas.¹⁴ In other words, government spends seven times more per job on agriculture relative to tourism, 17 times more on forestry and 2.3 times more on oil & gas to help stimulate the economy.

Despite its strong employment returns, the fact tourism spending in Alberta has grown nearly 35% since the pandemic, and also given the reality that the province’s disciplined approach to tourism development saw it lead the country’s pace of growth nearly four-fold in 2024, the level of government funding for the tourism industry is simply not commensurate with its proven economic contributions and, future potential.

As has been stated previously by TIAA, the industry has the potential to generate considerably higher returns with the right targeted investments supporting Travel Alberta’s work in support of the Higher Ground Tourism Strategy. However, visitor demand remains highly seasonal, with the vast majority of tourism activity that occurs in the Calgary, Edmonton, and Canadian Rockies regions (Figures 6 to 8).

Figure 6: Seasonality of International Visitors



Source: Statistics Canada Table 24-10-0050-01

¹⁴ Ibid

Figure 7: Domestic Visitor Expenditure Proportions

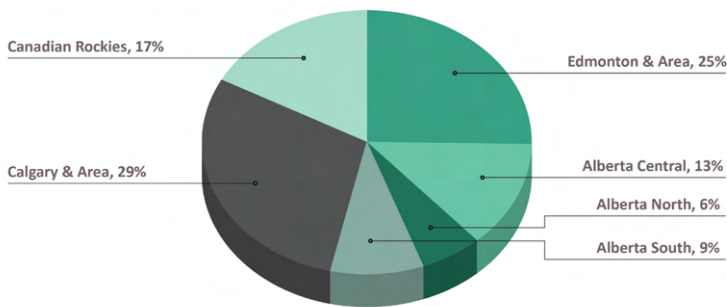
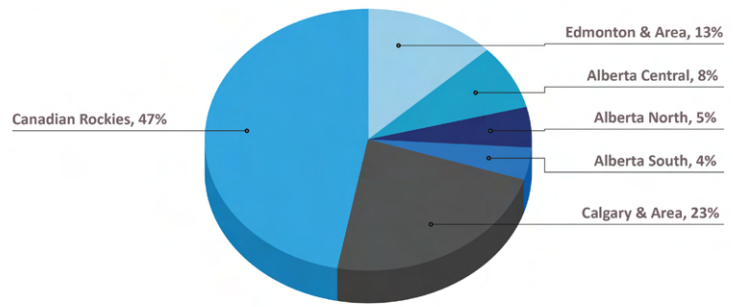


Figure 8: International Visitor Expenditure Proportions



Source: Travel Alberta 2019 visitor profiles by region. Available at: <https://www.alberta.ca/alberta-visitor-profiles.aspx>

Tourism destinations and experiences have historically been built to meet peak summer demand, but this has also led to increased visitation during peak periods and contributed to vehicle congestion and overcrowding of many popular visitor locations: something that can put pressure on the natural environment and make it harder to manage sustainability and reputational messages.

Efforts to grow the tourism economy during off-peak periods and develop new destination offerings outside of traditional markets will certainly help to alleviate sustainability and social license pressures, build the capacity of the province to leverage existing assets, and, extend the visitor season and sustain the industry workforce year-round.

Tourism New Zealand, for example, has identified year-round tourism visitation as a central plank of its 2024-28 tourism strategy and FY25 focus:

“Tourism will become a sector that delivers across the year for New Zealand, utilizing existing infrastructure, growing airline capacity, creating secure versus seasonal employment and ensuring visitation is spread across our seasons to ensure our home is looked after.”¹⁵

As the province’s key asset to market, promote and evolve the range of investment in visitor-facing assets and experiences, Travel Alberta plays a key role in expanding and diversifying visitor markets in Alberta. The crown corporation conducts in-depth research and investment analysis to support expansion of Alberta’s tourism product offerings. Some of their

more notable investment opportunities include a northern lights product offering, upscale guest ranches, a luxury eco-lodge, a high-end resort and various attractions to expand the Edmonton area product offering.¹⁶ Travel Alberta also offers a product development fund to cost-share new investments and is actively seeking to expand tourism assets in its ten tourism development zones across the province.

These efforts have significant potential but need to be scaled to truly catalyze on the opportunity to diversify Alberta’s tourism product offering and extend the visitor season year-round.

2.5 INTEGRATING KEY ECONOMIC SECTORS INTO ALBERTA’S VISITOR EXPERIENCE

Alberta is a world leader in many aspects of our economy – whether through agriculture, film, energy, forestry, technology or workforce capability. The province is renowned for its ingenuity, innovation, sustainability and natural environment. Correspondingly, there is a tourism aspect embedded in every industry in the province, which presents an opportunity to expand the visitor value proposition our province offers. The province could leverage its existing and complementary economic sectors into its tourism destination development and marketing efforts to increase visitor activity.

While not an exhaustive list, Table 3 describes some notable examples of how Alberta’s tourism product offering can be enhanced through our leading industries.

¹⁵ Tourism New Zealand. 2024.2024-2028 and FY25 Strategy. Available at: <https://www.tourismnewzealand.com/assets/about/publications/Strategy-overviews/Tourism-New-Zealand-2024-2028-Strategy-Overview.pdf>

¹⁶ Travel Alberta. 2025. Market Research and Opportunities Reports.

Table 3: Tourism Product Potential in Alberta's Leading Industries

INDUSTRY	TOURISM ATTRIBUTE	OPPORTUNITY
Food and Agriculture	Food and Agriculture is valued at over \$17 billion in 2024, shipped to global markets including China, Japan, Mexico and India.	With broad market penetration across the globe and agriculture-dedicated staff located in Alberta's international offices, there is an opportunity to draw visitors (e.g. governments, consumers, importers, investors etc.) to Alberta to explore Alberta's agriculture sectors and value chain, and participate in agri-tourism experiences.
Film	Alberta's film industry has been a growing part of the economy, contributing \$450 million to the provincial GDP and 3,200 people in 2023. The industry is supported by Alberta's film and television tax credit. Film locations can create a sustained visitor draw for fans of the productions.	Alberta could enhance the strategic integration and marketing of Alberta-based film productions with Travel Alberta to more fully capitalize on the ability to draw fan-bases to Alberta film locations.
Forestry	Wood products represent over \$4 billion in export value to countries including the US, China Japan and South Korea.	Alberta's natural forest areas are unique, and the forestry industry employs world leading sustainability practices. Alberta has the potential to position itself as a leader in sustainable forestry practices and host current and potential trade partner countries to witness these practices firsthand. ¹⁷
Upstream Oil and gas	Oil sands operators frequently conduct site tours with international dignitaries and influential stakeholders to showcase the efficiency/ performance of their in-situ operations, their strong relationships with First Nations, and/or their leading environmental stewardship/ reclamation technology at oil sands mines	The oil sands are an iconic and globally recognized phenomenon. There is an opportunity to leverage this interest into a more complete visitor experience in the Fort McMurray area, including the integrated environmental, economic, and First Nations partnerships attributes of the industry.
Indigenous Tourism Development	Indigenous tourism is an increasingly demanded product offering for international visitors. Indigenous Tourism Alberta (ITA) encourages and promotes authentic Indigenous tourism that showcases the unique and immersive experiences offered by its members throughout the province.¹⁸ In addition, the Alberta Indigenous Opportunities Corporation (AIOC) provides Indigenous loan guarantees in support of tourism projects.¹⁹	Alberta has the opportunity to continue to support and integrate Indigenous tourism product service offerings into Alberta tourism investment, marketing and outreach initiatives.

¹⁷ Avenue Magazine. All About Alberta's Sustainable Forestry Practices – and Why That Matters to Us All. Available at: <https://www.avenuecalgary.com/sponsored/showing-albertas-forests-some-love/>

¹⁸ Indigenous Tourism Alberta. 2025. Available at: <https://indigenoustourismalberta.ca/industry/about/>

¹⁹ Alberta Indigenous Opportunities Corporation. 2025. Available at: <https://theaioc.com/>

Table 3: Tourism Product Potential in Alberta's Leading Industries

Technology	Alberta is increasingly positioned as a technology hub, contributing 3% of provincial GDP and 9% of provincial employment. ²⁰	According to the OECD (64):²¹ “Tourism SMEs are at risk of being left behind in the digital transition...more needs to be done to raise awareness and uptake of digital technologies that can support the tourism workforce including through automated human resource planning and booking systems, digital marketing and artificial intelligence.” The province has an opportunity to facilitate direct connections or programs that support the technology needs of the industry.
Education and Talent	International and out of province migrants and students provide a critical talent pipeline to support the capacity and sustainability of the sector.	Offering world-class tourism post-secondary education, training and workplace experience opportunities and marketing these opportunities with our trade partners will help draw the best international talent to Alberta to support our tourism industry.
Government Events and Summits	International events have the potential to showcase and market Alberta to the world and draw more international visitors. The June 2025 G7 summit in Kananaskis, for example, is expected to lead to a long-term increase in international visitors to the province.²²	Maximizing our ability to host major international events and conventions enables the province to take full advantage of our tourism assets –potentially during off-peak periods.

These are just a few of the opportunities that could be available to market the province and expand tourism inter-connections and product offerings across the economy. Advancing these types of initiatives would strengthen the overall capacity of

the industry, enhance its economic resilience over time (and across seasons), expand the profile of the province internationally and cross-sectorally, and increase the tourism sector's contribution to the provincial economy.



²⁰ Calgary.tech. 2025. Alberta's Tech Economy is Booming and Poised for Future Growth, Report Concludes. March. Available at: <https://calgary.tech/2025/03/19/albert-tech-economy-booming-future-growth-outlook/>

²¹ OECD. 2024. Tourism Trends and Policies. P 64. July. Available at: https://www.oecd.org/content/dam/oecd/en/publications/reports/2024/07/oecd-tourism-trends-and-policies-2024_17ff33a3/80885d8b-en.pdf

²² Calgary Herald. 2025. 'Priceless' exposure: Tourism officials' eye long-term gains from G7 buzz. June. Available at: <https://calgaryherald.com/news/local-news/priceless-exposure-tourism-long-term-gains-g7-banff-kananaskis>

3 AN INTEGRATED TOURISM STRATEGY FOR GOVERNMENT

Comparable jurisdictions have developed structures and initiatives that position them to take full advantage of the trade diversification, economic growth and productivity enhancing attributes of the tourism industry growth opportunities before them. Central to success of these strategies is an integrated, whole of government approach across multiple ministries and agencies.

According to OECD's 2024 Tourism Trends and Policies report:²³

Tourism offers untapped potential for many people, businesses, and places. Governments, at all levels, have a role to play in shaping tourism development to respond to these challenges, capitalize on opportunities, and deliver better outcomes. However, implementation remains an issue... Effective governance practices and co-ordinated policy action are needed to deliver on these ambitions, supported by sufficient resources at national, regional, and local level.

According to Tourism Ireland, "while transport, heritage, culture, the natural environment, and sports each have a contributory role in the visitor experience, a review of international best practice shows that in more than half of OECD member states responsibility for tourism now resides within an economic ministry."²⁴

Both the U.S. and Canada have recognized the importance of integrating the tourism industry into government decision making, although the U.S. has developed a far more sophisticated and resourced strategy.

3.1 THE U.S.

The U.S. National Travel and Tourism Office (NTTO) is housed in the International Trade Administration

(ITA), which "works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth."²⁵ This is a deliberately economically focused mandate that integrates across all the necessary areas of government. Additionally, the US government created the Travel and Tourism Advisory Board (TTAB), which "advises the Secretary of Commerce on government policies and programs that affect the U.S. travel and tourism industry and provides a forum for discussing and proposing solutions to industry-related problems. The U.S. also created Brand USA, a nonprofit corporation "to promote the United States as a premier travel destination and communicate U.S. visa and entry policies."²⁶

Overall, the U.S. offers one of the most strategic, integrated and sophisticated tourism functions in the world with well-established governance infrastructure and resources, government policy towards the industry.

3.2 CANADA

Canada has begun to recognize the importance of integrating the tourism industry into government decision making. The Ministry of Innovation, Science and Economic Development (ISED) leads national tourism policy development at the federal level in support of the Ministry of Tourism. Destination Canada is the national destination marketing organization that promotes Canada abroad.²⁷ The Canadian Council of Tourism Ministers supports coordination and joint action on tourism in Canada.²⁸

While this has been a helpful approach, tourism is not sufficiently integrated into federal government decision making. Rather than having a formalized agency within the equivalent of the trade and commerce function and structured participation across relevant government functions, Canada has created a less formalized Ministerial Tourism

²³ OECD. 2024. Tourism Trends and Policies. July. Pp 14-15 Available at: https://www.oecd.org/content/dam/oecd/en/publications/reports/2024/07/oecd-tourism-trends-and-policies-2024_17ff33a3/80885d8b-en.pdf

²⁴ Tourism Ireland. 2024. Vision 2030: An Irish Tourism Strategy for Growth. Available at: <https://www.iti.ie/vision-2030/#:~:text=Action%2Dled%20Outcomes,will%20be%20key%20to%20success>

²⁵ US National Travel and Tourism Office. 2025. Available at: <https://www.trade.gov/travel-and-tourism-policy-and-strategy#?anchor=content-node-t7-field-lp-region-2-3>

²⁶ Ibid

²⁷ Ibid p 114.

²⁸ Federal-Provincial-Territorial Conference of Ministers responsible for Tourism. 2003. Available at: <https://scics.ca/en/product-produit/news-release-ministers-take-action-to-support-tourism-in-canada>

²⁹ Government of Canada. 2023. Ministry of Innovation, Science and Economic Development. Canada 365: Welcoming the World Every Day. The Federal Tourism Growth Strategy. P 26. Available at: <https://ised-isde.canada.ca/site/canadian-tourism-sector/en/canada-365-welcoming-world-every-day-federal-tourism-growth-strategy>

Council, involving ministries across the federal government, including “employment and skills, regional and national economic development, parks, transportation, immigration, border services, and housing.”²⁹ This council does not have a strong and integrated decision support function or resource endowment across the federal government, which largely limits its ability to mobilize significant people and resources towards advancing meaningful tourism policy objectives.

3.3 ALBERTA

In Alberta, the Ministry of Tourism and Sport is responsible for implementing the province’s vision to grow tourism expenditures to \$25 billion by 2035. The Ministry is also responsible for Travel Alberta, the destination marketing and management arm of the province.

The crown corporation has done an admirable job in prioritizing and growing the tourism economy in the province. Travel Alberta and Invest Alberta maintain a strong level of collaboration to support tourism investment attraction in the province, and the agency has General Sales Agents (GSAs) in all active markets to undertake promotion, marketing, media relations and sales missions with select tourism businesses and destination representatives. Moreover, Travel Alberta offers funding to tourism businesses and investors to de-risk and attract tourism investments across all areas of the province.

While the government has positioned Travel Alberta as the lead agency to support industry growth and expansion in the province, it has not yet applied an integrated “whole of government approach” to growing and advancing the tourism industry.

Unlike OECD best practice or the Canadian and U.S. government approaches, Alberta does not have a multi-disciplinary table that evaluates and coordinates government tourism decision-making across functional areas.

That said, the Alberta government has the potential to establish new and/or utilize existing governance infrastructure to implement a strategic framework to execute on the integrated strategy needed to capitalize on the diversification and trade potential of the tourism economy in the province.

Integrated government decision-making is critical to the success and growth of the tourism industry. The industry is impacted by multiple government ministries beyond tourism, including housing, transportation, interprovincial and international relations, economic development and trade, skills training, immigration, rural economic development, environment and protected areas, and finance/tax policy.

Strategically, the government could leverage the industry to not only increase visitation counts and spending in the province but attract foreign direct investment and generate economic activity in rural areas across the province.

Moreover, Alberta’s tourism industry uniquely strengthens the province’s long-term competitiveness by building a healthier, more engaged, and more productive population. Tourism assets, from provincial parks to rural cultural experiences, serve as Alberta’s natural wellness infrastructure, connecting residents to nature, heritage, and community.



Travel Alberta, Silver Fern Productions

4 RECOMMENDATIONS

In 2024, Alberta set the ambitious goal of growing tourism expenditures from \$10.7 billion in 2022 to \$25 billion by 2035, and it actually achieved its 2026 goal of \$14 billion a year early.³⁰

This is a commendable result for the province and a clear indication that there has been a solid return on investment for government as a result of its recent year's support for Travel Alberta. Nevertheless, there are increasing global headwinds and unless the province adopts a more holistic, economically-aligned-across-key-ministries approach that seeks to tap into the breadth of private sector ingenuity and risk-taking, the province is likely to fall short of its goal and potential.

TIAA offers the following recommendations to the Alberta government:

INTEGRATED GOVERNMENT DECISION-MAKING

- Consistent with the provincial Higher Ground Strategy, establish and resource an Inter-Ministerial Committee on Tourism (IMCT) that reports to the Premier, is chaired by the tourism minister, and whose membership includes deputy level staff from all ministries that impact tourism.
- Direct the Inter-Ministerial Committee on Tourism to develop and resource a tourism growth workplan that incorporates contributory roles from each ministry into achieving the Higher Ground Strategy, while defining and incorporating multiple ancillary objectives, including FDI attraction, rural economic development and improved health outcomes that might be associated with greater access to tourism and outdoor recreation experiences.
- Direct the IMCT to formally consult with the TIAA and its Industry Associations Advisory Council of CEOs on annual strategic policy and budgetary considerations to ensure alignment to the goals of the Higher Ground Tourism Strategy and the needs of the tourism industry overall.

PRIORITIZE TRADE, INVESTMENT ATTRACTION AND DIPLOMACY IN TOURISM MARKET OUTREACH

- Evaluate and prioritize visitor markets in countries with Canadian Free Trade Agreements to better support FDI attraction and strategic geopolitical alignment to maximize the economic value of Alberta's tourism strategy while ensuring strategic alignment from a diplomatic relations perspective. Alberta should set a goal to double tourism's proportion of FDI by 2030.

SUPPORT TRAVEL ALBERTA'S EFFORTS TO EXPAND AND DIVERSIFY ALBERTA'S TOURISM OFFERINGS

Travel Alberta, as Alberta's destination marketing and development organization, is well positioned strategically to attract investment in tourism product offerings and grow the industry in new markets across the province. What it needs are sufficient resources at scale to capitalize on the investment and marketing opportunities before it.

- Immediately commit the full annual intake revenues generated through the Alberta Tourism Levy to Travel Alberta to support its role as a destination marketing and management organization and commit an additional funding tranche of no less than \$60M/year over the next 5-years, to support its efforts to catalyze private sector investment, to support infrastructure and new destination development, and to further address structural supply challenges, such as air route development, and tourism career awareness/ labour force initiatives.

³⁰ Government of Alberta. 2024. Higher Ground: A Tourism Sector Strategy. Amplifying the Alberta Advantage for the Visitor Economy. P. 3. Accessed at: <https://open.alberta.ca/publications/higher-ground-tourism-sector-strategy#:~:text=The%20strategy%20focuses%20on%20five,visitor%20economy%20reaches%20new%20heights>



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