Labour Market Study of Alberta's Tourism Sector

March 2023

PREPARED BY:

Tourism HR Canada
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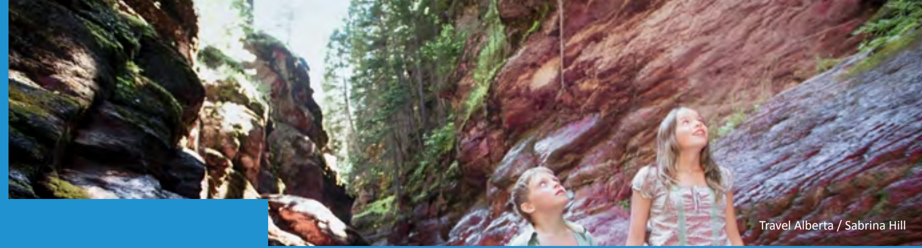
PREPARED FOR:

TOURISM INDUSTRY ASSOCIATION ALBERTA



Travel Alberta / Sabrina Hill

A note about terminology

In this report, the **tourism sector** is defined as consisting of the following industries:

Transportation:
Transport of passengers via air, rail, road or water for transportation or sightseeing *e.g. bus operators, airlines, taxis*

Accommodation:
Providing short-term lodging for travelers, vacationers and others *e.g. hotels, campgrounds, resorts*

Food and Beverage Services:
Preparing meals, snacks and beverages, to customer order *e.g. restaurants, clubs, pubs, cafes*

Recreation and Entertainment:
Entertainment and recreational services and attractions e.g., museums, parks, ski hills, theatres and festivals

Travel Services:
Travel arrangement and reservation services *e.g. travel agents, event organizers*

Cover, Main: Travel Alberta / Davey Lieske
Cover, Top: Travel Alberta / Hubert Kang
Cover, Bottom: Rogier Gruys

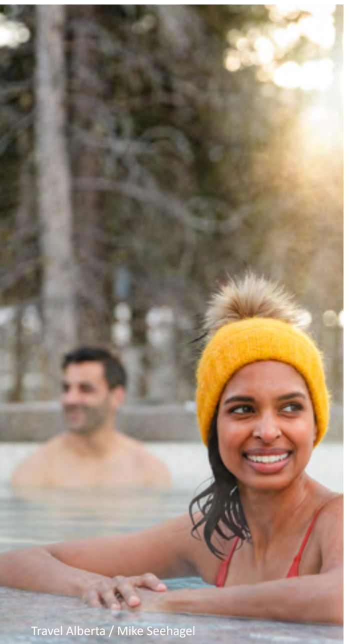
Executive Summary

Travel Alberta / George Simhoni

There is a serious labour shortage in Alberta's tourism sector, with most businesses reporting difficulty in filling their vacant positions. Recruitment, retention, and competition from other sectors exacerbate general operating issues. These problems are further compounded by uncertainties around larger economic volatility, shifting visitor expectations, and current climactic and geopolitical instabilities, which make business planning more complex than ever. There are several factors which directly impact labour issues:

- **Demographics:** The Canadian population is aging, and many older workers left the workforce entirely during the pandemic. Younger workers have different expectations of work, making retention particularly difficult in some tourism industries.
- **Immigration:** Bringing new labour into Canada is necessary to offset domestic demographic trends, but current immigration streams are cumbersome, inefficient, expensive for businesses, and are not well-suited to the specific needs of tourism businesses.
- **Mental health:** Many businesses in Alberta reduced their workforce during the pandemic, and those employees who stayed on tended to take on more responsibilities. As businesses reopened, workload increased but staff numbers did not, and there is a serious risk of burnout, particularly among supervisors and managers.

These labour issues do not exist in a vacuum. Throughout the research, a number of overarching themes emerged as central to addressing chronic and acute labour pressures facing the tourism sector in Alberta.


Travel Alberta / Mike Seehagel

Problems with **housing** and **transportation** underlie many of the labour issues facing tourism.

These problems are not unique to tourism, but tourism businesses by nature of where, when, and how they operate are particularly affected by them. If people cannot afford to live where they work, or to travel from where they live to where they work, they will work elsewhere.

The tourism landscape is Alberta is as diverse as it is vast: **sub provincial bodies** will help support regional and local initiatives.

DMOs in Tourism Development Zones (TDZs) can meet some of the needs of businesses, but there is a strong need for specific supports around immigration, HR practices, training, employee sharing programs, housing and transportation, and pooling resources between businesses within a defined geographical region.

The **profile of the tourism sector** needs to be raised, both in terms of government traction and employment desirability.

Because of its internal variability, tourism is rarely seen as a coherent sector when it comes to policy making, so its economic impact is generally underestimated. Relatedly, tourism is not seen as a career destination but as a starter job to develop transferrable skills. Both perspectives need to change.

Tourism needs to rethink the **total cost of labour** in its business models.

Labour is traditionally seen as a cost rather than an investment, so the economics of operating margins consistently underestimates the ROI of having happy and well compensated staff. Increasing labour costs will also entail rethinking which customers businesses attract, and adapting product offerings to meet changed expectations.

By adopting a range of research approaches, this project has been able to identify several of the key issues and pinch-points constraining the tourism labour force in Alberta. Recommendations have been developed to support the continued recovery and growth of the sector, with particular focus on human capital development and strategic planning.

Key Problems Facing Alberta's Tourism Labour Force

- Aging and shrinking Canadian population
- Difficulties in recruiting and retaining immigrant workers
- Mental health and wellbeing pressures across existing and incoming workforce

Significant Findings from this Study

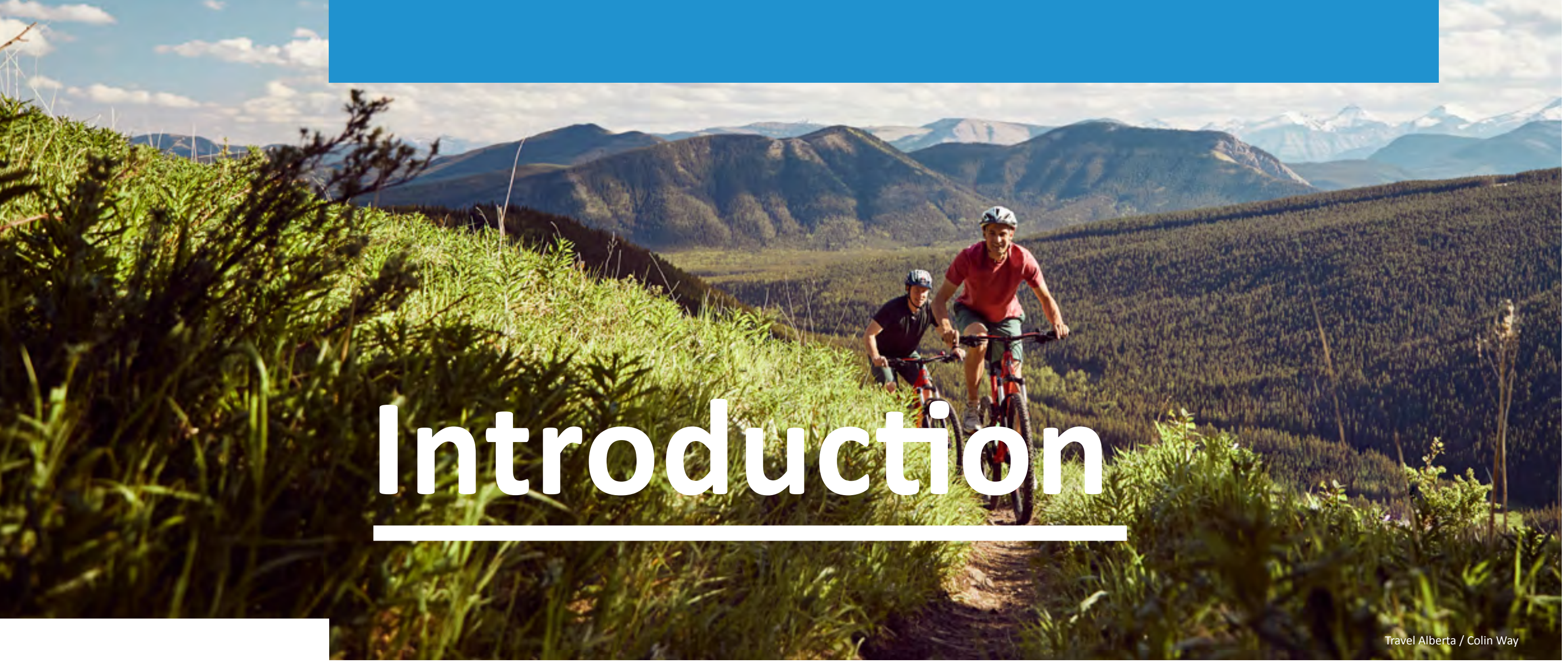
- Infrastructure is fundamental to the tourism sector and needs to be improved to meet tourism workers' needs, particularly around housing and transportation.
- Due to the diversity and complexity of tourism labour force and employment landscape, regional bodies are needed to coordinate business resources, facilitate labour-related programs, and to develop HR practices within the region.
- Tourism occupations are generally seen as low-prestige and unattractive; the profile of the tourism sector needs to be improved.
- The business model in tourism needs to be changed, so that labour expenses are seen as an investment rather than a cost.

Recommendations

- Changes to the current immigration streams and programs
- Engagement with educational institutions to raise students' awareness of tourism careers and professionalism in the sector
- Structural changes to how the tourism sector organizes its engagement with the workforce
- Changes in how businesses are managed with HR practices
- Reframed narratives of tourism employment, to improve the sector's prestige and increase attraction and long-term retention
- Improved awareness of tourism's economic footprint in the province

Directions for Future Research

- Keep monitoring the labour market situation
- Conduct annual perception surveys to track perception changes, particularly as campaigns are rolled out
- Research economic models and total cost accounting to develop appropriate tools for understanding staff contribution to business profits
- Interview students from partnered educational institutions to understand perceptions and expectations from future sector workers and leaders
- Follow up on implementation of recommendations, as noted



Introduction

Travel Alberta / Colin Way

Rationale

Significant Loss of Tourism Employment

The initial loss of employment due to the rapid onset of the COVID-19 pandemic in Canada, followed by repeating rounds of employment losses in response to public health orders, led to a long-term loss of workers in the tourism sector. In Alberta, tourism employed 248,400 individuals in February 2020; by April, the number of **employed tourism workers had fallen by 41.9%** to 133,200 people. The unemployment rate in the tourism sector reached 29.0% the following month, while the overall unemployment rate for the province reached 15.9%. Many of the industry groups within tourism, such as food and beverage services and accommodations, had even higher rates of unemployment. Canada's economy lost employment in many sectors, but none were as badly impacted as the tourism sector.

Building on previous work

A project carried out in 2021 and 2022 with Indigenous Tourism Alberta (ITA) and Tourism HR Canada focused on employment in Indigenous Tourism, with a particular focus on labour issues. This project refined methodologies around combining surveys and facilitated focus groups, which have informed the design of this project. While the ITA research focused on Indigenous Canadians in particular, several of the themes that emerged served to highlight the commonalities – as well as the unique cultural differences – between Indigenous and non-Indigenous Canadians working in tourism. The current project builds on these findings, and although the Indigenous lens is not part of the design of this project, the recommendations included here will equally support the Indigenous Tourism sector in Alberta, and will continue to build a path towards reconciliation.

Seeking Solutions

As the sector continues to rebuild in the wake of this unprecedented disruption, tourism employers require targeted support and guidance as they navigate the challenging economic environment, adapting a variety of solutions to help mitigate the current labour shortage. Effective support for tourism workforce recovery, and reducing barriers for talent attraction and retention, require **evidence-based strategies, tailored short-term solutions**, and **changes to policies and programs** aimed at providing an immediate and palpable impact.

Study Objective

The overall aim of the project was to conduct a **comprehensive labour market study** of the tourism sector in Alberta to inform defensible **recommendations for investments in human capital development** and **strategic planning for industry recovery**. The research culminated in a comprehensive labour market analysis that has outlined the current political, social and economic environment of the tourism labour market within Alberta, while also taking the long-lasting impacts of the COVID-19 pandemic into consideration. This has created an in-depth assessment of the current labour force, and has identified key challenges that need to be addressed to increase labour force capacity to align with the growth rate of tourism pre- and post-COVID-19.

By adopting multiple methodologies in the research project, it has been possible to triangulate **key findings and trends** that have emerged through this multi-faceted analysis. The discussions that follow identify some of those high-level takeaways, focusing on both the **core demographic trends** that underpin labour issues across the sector, and on some of the **social, political, and economic areas** that have been brought forward as operational choke-points on the road from COVID-19 recovery into regrowth and renewal. These discussions draw on diverse elements of the project components, and where applicable, the full reports of these components have been included in the appendices of this report.

The study results support **evidence-based decision-making** and have **practical value for individuals, businesses, and policy-makers**. A number of **recommendations** are presented, organized around key areas that need to be addressed in the short-, mid- and long-term, if the tourism sector in Alberta is going to continue to flourish. It is unlikely that all of these recommendations will be actionable in practical terms, but the intention is to identify areas where concrete and measurable change can be enacted to **materially improve** the operating conditions of the tourism sector in Alberta.

Travel Alberta / Jake Dyson

Project Partners

To track the recovery status of Alberta's tourism labour market, to uncover labour market challenges faced by Alberta tourism businesses, and to put forward labour market strategies and recommendations, this project was conducted in partnership between the Tourism Indus try Association of Alberta (TIAA) and Tourism HR Canada. The research was conducted from November 2022 through to March 2023.

The Tourism Industry Association of Alberta 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 substantial economic value for the province.

The mandate of TIAA includes:

- Advocating policy that supports the growth and sustainability of all facets of Alberta's tourism economy;
- Through industry leadership and/or private-public sector partnerships, driving innovation, investment, product development and new visitor experiences;
- Working collaboratively with the Government of Alberta and Travel Alberta to support an audacious target of more than doubling the value of Alberta's tourism economy by the year 2030; and,
- Ensuring a sustainable organizational model for TIAA.

Tourism HR Canada is a pan-Canadian organization with a mandate aimed at building a world-leading tourism workforce. Tourism HR Canada facilitates, coordinates, and enables human resource development activities that support a globally competitive and sustainable industry and foster the development of a dynamic and resilient workforce.

To achieve this mandate, Tourism HR Canada responds to various labour market issues and invests in programs deemed necessary to address needs, such as labour market/ human capital strategies, employer investments in training, improved curriculum to respond to market demands, and labour market adjustments.

TOURISM INDUSTRY ASSOCIATION ALBERTA

Tourism HR Canada RH Tourisme Canada

Methodology

Overview

This project draws together several distinct lines of evidence to map out the current context in the Alberta tourism sector, with a particular eye to the labour shortages and their impacts on businesses, as well as directions for improving the operating conditions of tourism businesses and operations in the province.

This includes engaging with monthly statistical, conducting surveys, and moderating in person focus groups. In the following pages, each methodology is introduced, and where applicable, some of the key findings are briefly presented.

Statistical Data

Monthly LMI Reports

The monthly LMI reports track tourism labour market information of Alberta using Statistics Canada's personalized tourism Labour Force Survey and public data. Specifically, these reports track the following information:
Tourism employment

- Hours of work
- Provincial tourism employment
- Job vacancies
- Employment by sector
- Unemployment and unemployment rate
- Number of people who are not in the labour force
- Participation rates by age groups
- Number of travellers
- Food services sales
- Active tourism businesses
- Gross domestic product (GDP)

Except for GDP, which is at a national level, all other indicators are measured at provincial levels. At the beginning of the monthly LMI report, there is a high-level summary that highlights important labour market information for each month.


Parks Canada / Rogier Gruys


Travel Alberta / Ryan Bray

LMI Dashboard

To visualize the labour market trends in Alberta, a web-based LMI dashboard is embedded in both the TIAA and Travel Alberta websites, which is updated monthly. This provides an interactive data experience for anyone in the public, including sector business operators, industry and professional associations, and policy-makers.

- TIAA Link
- Travel Alberta Link

This Dashboard Presents:

- Monthly labour force in Alberta's tourism sector and change in labour force from 2019 by industry group and by province
- Monthly employment in Alberta's tourism sector and change in employment from 2019 by industry group and by province
- Monthly hours worked in Alberta's tourism sector and change in hours worked from 2019 by industry group and by provinceMonthly unemployment in Alberta's tourism sector and change in unemployment from 2019 by industry group and by province
- Enrolment in tourism-related programs trends by province

Survey Approaches

Business Intelligence Survey

The business intelligence survey was conducted with tourism businesses and organizations across the province of Alberta in November and December 2022. The primary research objectives of the survey were to:

- Evaluate recruitment and retention strategies and related challenges in light of a reduced tourism labour force;
- Develop a clear understanding of the current tourism business conditions in Alberta; and
- Assess the training requirements of the tourism sector.

In total, 90 responses were collected for the survey. Survey findings showed that:

- Recruitment and retention issues were of concern to Alberta tourism businesses across all industries, and strategies and targeted recruitment practices had been applied to offset the labour challenges.
- Positive signs had been observed. For example, operating conditions were improved; new types of products or services were offered; e-commerce had been adopted. However, some challenges were still faced by tourism businesses in Alberta.
- Employee training was crucial and Alberta tourism businesses generally had the capacity to provide employee training.

Recruitment and retention issues were of concern to Alberta tourism businesses across all industries.


Neil Zeller @neil_zee


Travel Alberta/ Roth & Ramberg

88% of Albertans think tourism is important to the economic well-being of the province, but only 26% of Albertans have a net positive view of tourism as a place to work, compared to pre-pandemic.

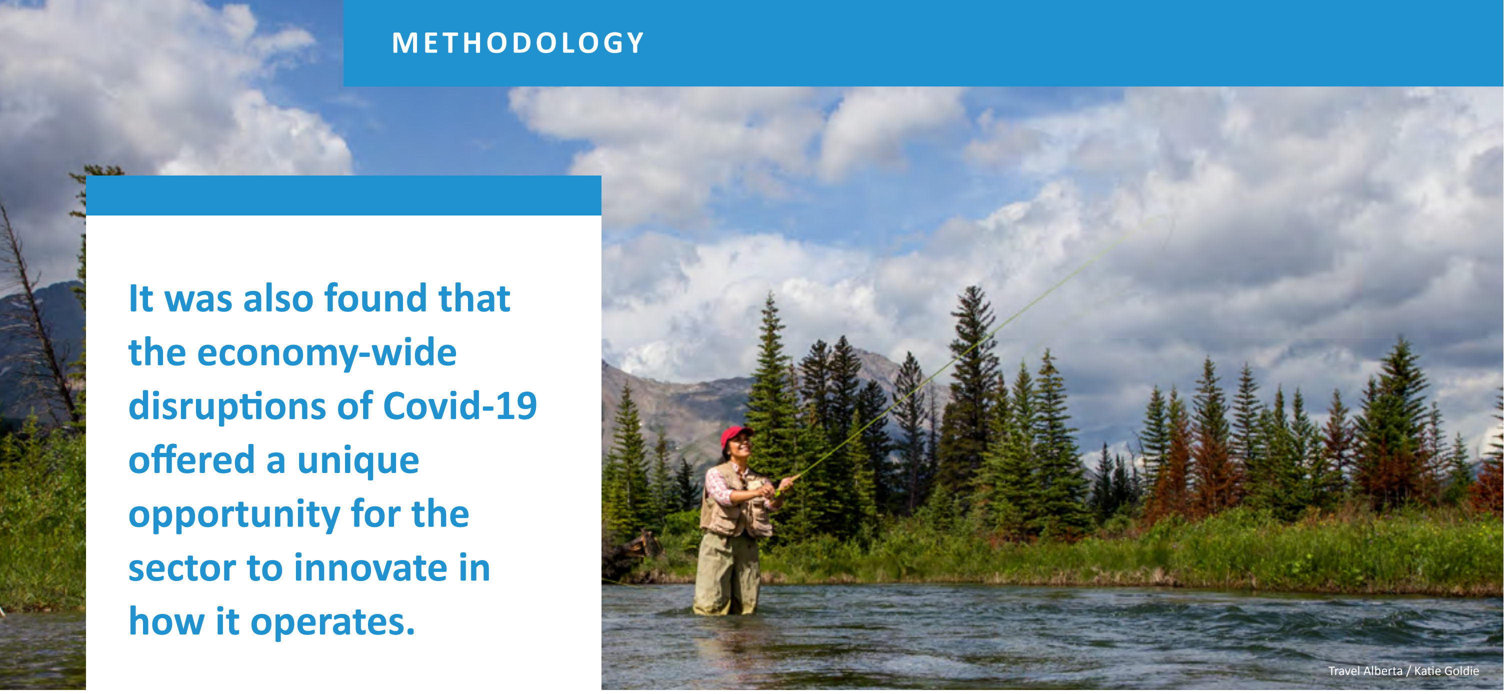
Perception Survey

The perception survey was conducted with Alberta residents who were over 18 years old in November 2022. The primary research objectives of the survey were to:

- Assess previous and current experience working in the tourism sector;
- Understand perceptions of the skills and experience acquired through working in tourism, including the impact of training;
- Evaluate perceptions of tourism as a place for employment, including desirability of working in the industry; and
- Determine how attitudes towards the tourism sector have altered in response to COVID-19.

In total, 1000 responses were received for the survey. Some general findings from the survey include:

- Few Albertans had ever taken training from tourism industries or organizations;
- Tourism jobs were seen as temporary jobs;
- The pay was low for most tourism jobs, which was not enough to lead a satisfactory life; and
- The promotion opportunities were unsatisfactory in the tourism sector.


Travel Alberta / Katie Goldie

It was also found that the economy-wide disruptions of Covid-19 offered a unique opportunity for the sector to innovate in how it operates.

In-person Discussion

First Wave: Identifying and Articulating Challenges

The first wave of focus group sessions was conducted with tourism business operators/managers from across the province of Alberta in November 2022. Two sessions were conducted in Calgary and one session was conducted in Edmonton. The primary research objectives of the focus group sessions were to:

- Get feedback from operators and industry professionals on business performance;
- Identify key labour issues and challenges;
- Engage in a discussion of how the tourism sector understands these labour issues, and possible solutions to them; and
- Assess the perceived mismatches and gaps in labour force skills relative to employment.

In total, 27 people attended the focus group sessions. Key messages derived from the discussion include **challenges** such as infrastructure (e.g., housing and transportation), training, changing lifestyles, mental health, recruitment, retention, and customer expectations; and **skill mismatches** such as social employability skills, attitudinal skills, and technical skills. It was also found that the economy-wide disruptions of Covid-19 offered a unique opportunity for the sector to innovate in how it operates. Based on these discussions, draft recommendations were generated for feedback in the second wave.

Second Wave: Workshopping Solutions

The second wave of focus group sessions was conducted with tourism business operators/managers from across the province of Alberta in January and February 2022. One session was conducted in Edmonton, one session was conducted in Calgary, and one session was conducted online. The primary research objectives of the focus group sessions were to:

- Discuss possible solutions to labour shortages; and
- Collect feedback on proposed recommendations.

Problems with housing and transportation underlie many of the labour issues facing tourism.

In total, 17 people attended the focus group sessions. From these discussions, several recurrent themes were identified:

- Problems with **housing and transportation** underlie many of the labour issues facing tourism.
- There is a need for **sub-provincial bodies** to help support regional and local initiatives, outside of pre-identified tourism development zones (TDZs)
- The profile of the tourism sector needs to be raised, both in terms of government traction and employment desirability.
- Tourism needs to rethink the **total cost of labour** in its business models.

From these conversations, the recommendations were revised and restructured to reflect intersections of need, commonalities, and responsibility.


Pursuit Collection / Mike Seehagel

Findings

Labour Market Trends

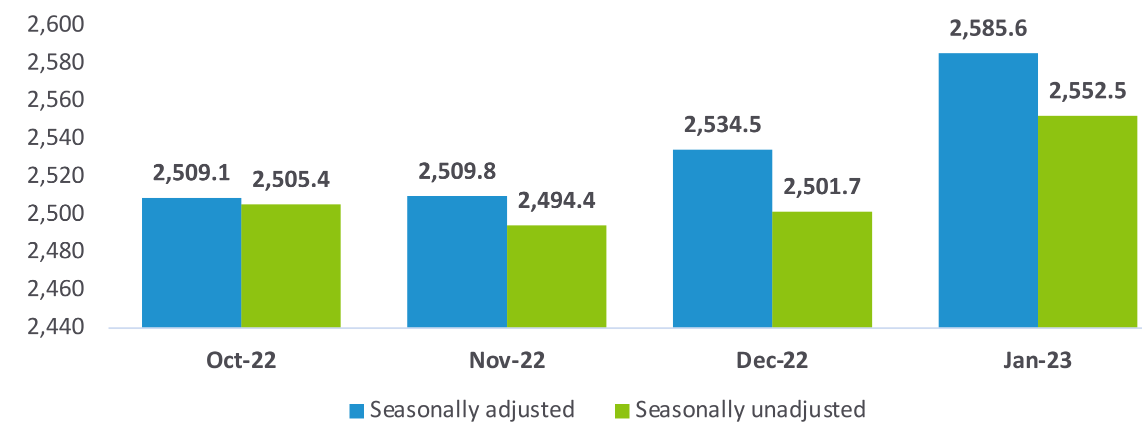
The COVID-19 pandemic had an extremely negative impact on Alberta's **overall provincial labour force** size when it started in February 2020. After only three months, however, the provincial labour force had essentially recovered. With several fluctuations since then, as of January 2023, the seasonally adjusted labour force size was 5.9% bigger than four years ago.

During the time frame of the project, Alberta's labour force size has been growing. The seasonally adjusted labour force size increased by 0.0%, 1.0%, and 2.0% in November 2022, December 2022, and January 2023, respectively. Seasonally unadjusted labour force size decreased by 0.4% in November 2022, but then increased by 0.3% and 2.0% in the following two months respectively.

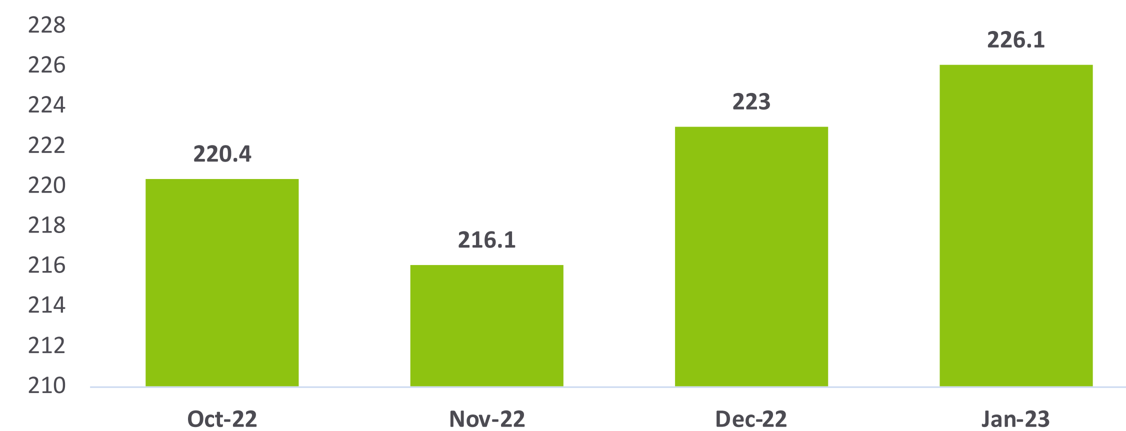
Alberta's **tourism labour force** was equally impacted by COVID-19. It reached its lowest point in April 2020, and has fluctuated since then after a slight rebound. To date, the tourism labour force remains substantially below its pre-pandemic levels: in January 2023, it was 9.4% smaller than it was in January 2019.

Over the course of this project, Alberta's tourism labour force size has been growing. Although the seasonally unadjusted labour force size decreased by 2.0% in November 2022, it then increased by 3.2% and 1.4% in the following two months. The tourism labour force size in January 2023 was 2.6% bigger than in October 2022.

Total labour force size in Alberta (seasonally adjusted and unadjusted, x1000)[1]



Tourism labour force size in Alberta (seasonally unadjusted, x1000)[2]



Unemployment Rate

Alberta's **overall provincial unemployment** and **unemployment rate** reached their historically high levels in May 2020. In 2022, unemployment and unemployment rates fell below their pre-pandemic levels. As of January 2023, there were 165,100 unemployed workers – equal to 6,600 fewer individuals than in January 2019. January's seasonally unadjusted unemployment rate was 6.5%, 0.6% lower than the same month four years prior.

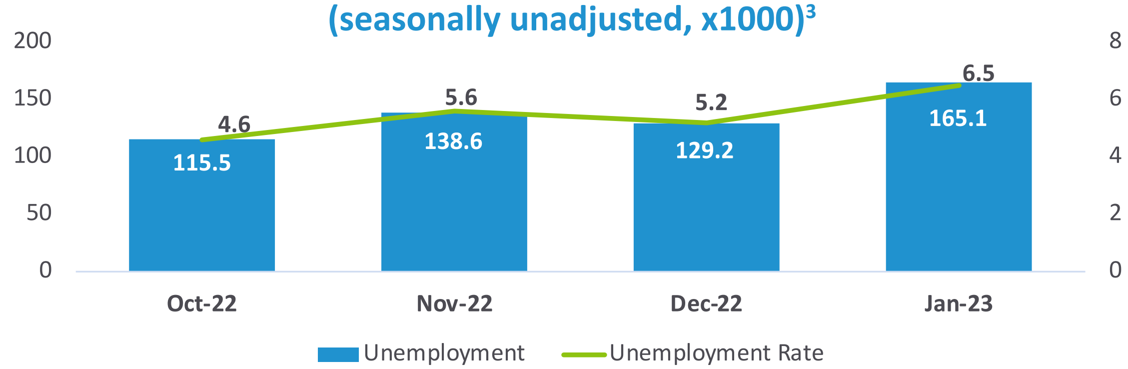
1. Statistics Canada. Table 14-10-0017-01 Labour force characteristics by sex and detailed age group, monthly, unadjusted for seasonality (x 1,000) and Statistics Canada. Table 14-10-0287-01 Labour force characteristics, monthly, seasonally adjusted and trend-cycle, last 5 months
2. Statistics Canada. Labour Force Survey, customized tabulations.

During the time frame of the project, both the number of unemployed workers and the unemployment rates were elevated significantly in Alberta. There were 42.9% more unemployed workers in January 2023 than in October 2022 and the unemployment had increased from 4.6% in October 2022 to 6.5% in January 2023.

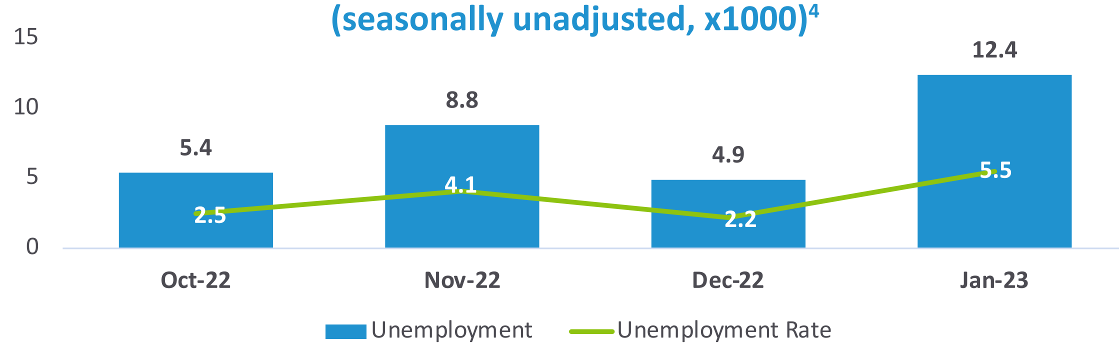
Alberta's **tourism unemployment and unemployment rate** also peaked in May 2020. While consecutive decreases were seen in the following months, the tourism unemployment and unemployment rate increased significantly after October 2020 and reached another peak in January 2021. It was not until June 2021 when tourism unemployment and unemployment rate essentially went back to normal (i.e., pre-pandemic levels). As of January 2023, there were 12,400 unemployed workers, equal to 1,300 more individuals than in January 2019. January's seasonally unadjusted unemployment rate was 5.5%, 1.1% higher than the same month four years prior.

Over the course of this project, both the number of unemployed tourism workers and the unemployment rates were elevated significantly in Alberta. There were 129.6% more unemployed tourism workers in January 2023 than in October 2022, and the unemployment had increased from 2.5% in October 2022 to 5.5% in January 2023.

Unemployed workers by month in Alberta (seasonally unadjusted, x1000)[3]



Unemployed tourism workers by month in Alberta (seasonally unadjusted, x1000)[4]

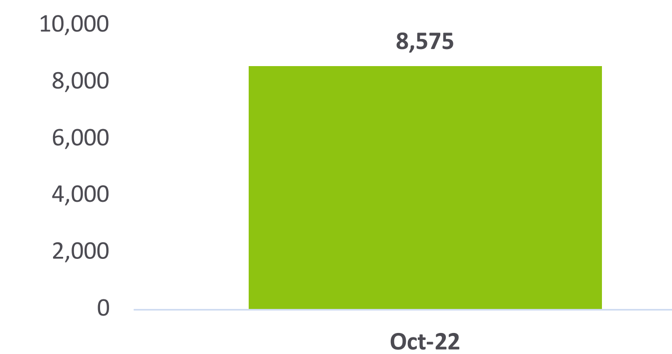


3. Statistics Canada. Table 14-10-0017-01 Labour force characteristics by sex and detailed age group, monthly, unadjusted for seasonality (x 1,000)
4. Statistics Canada. Labour Force Survey, customized tabulations.

Data on the number of **active tourism businesses** was most recently updated for the month of October 2022. As of October, there were 8,575 active tourism businesses in Alberta, which was 3.5% fewer than in February 2020 and 4.6% fewer than in October 2019.

The number of active tourism businesses was not updated during the time frame of the project, so recent comparisons are not possible at this time.

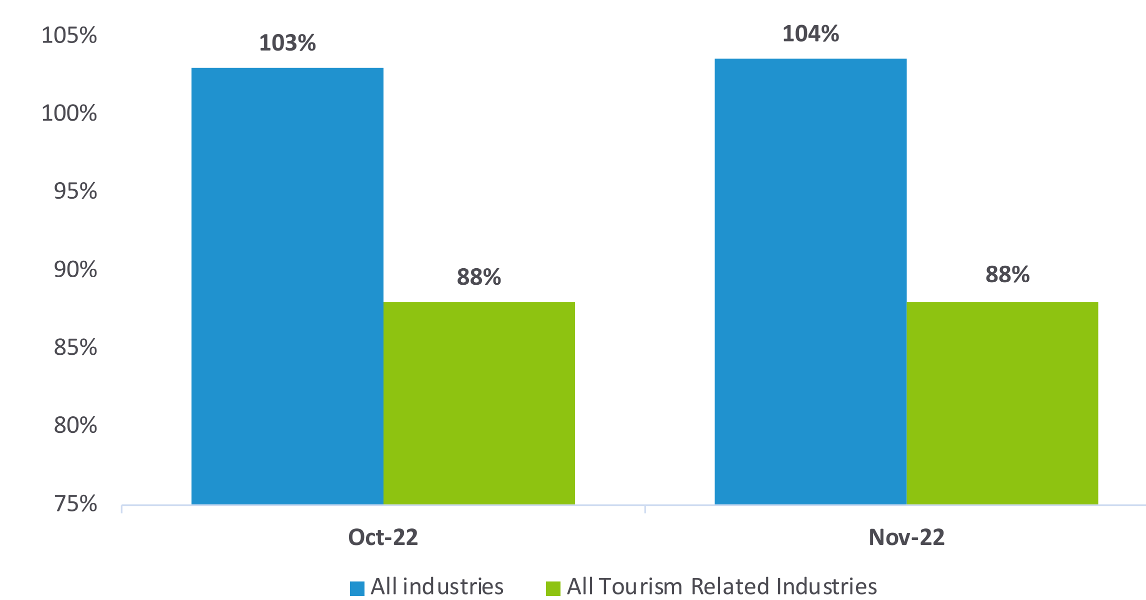
Active tourism businesses in Alberta[5]



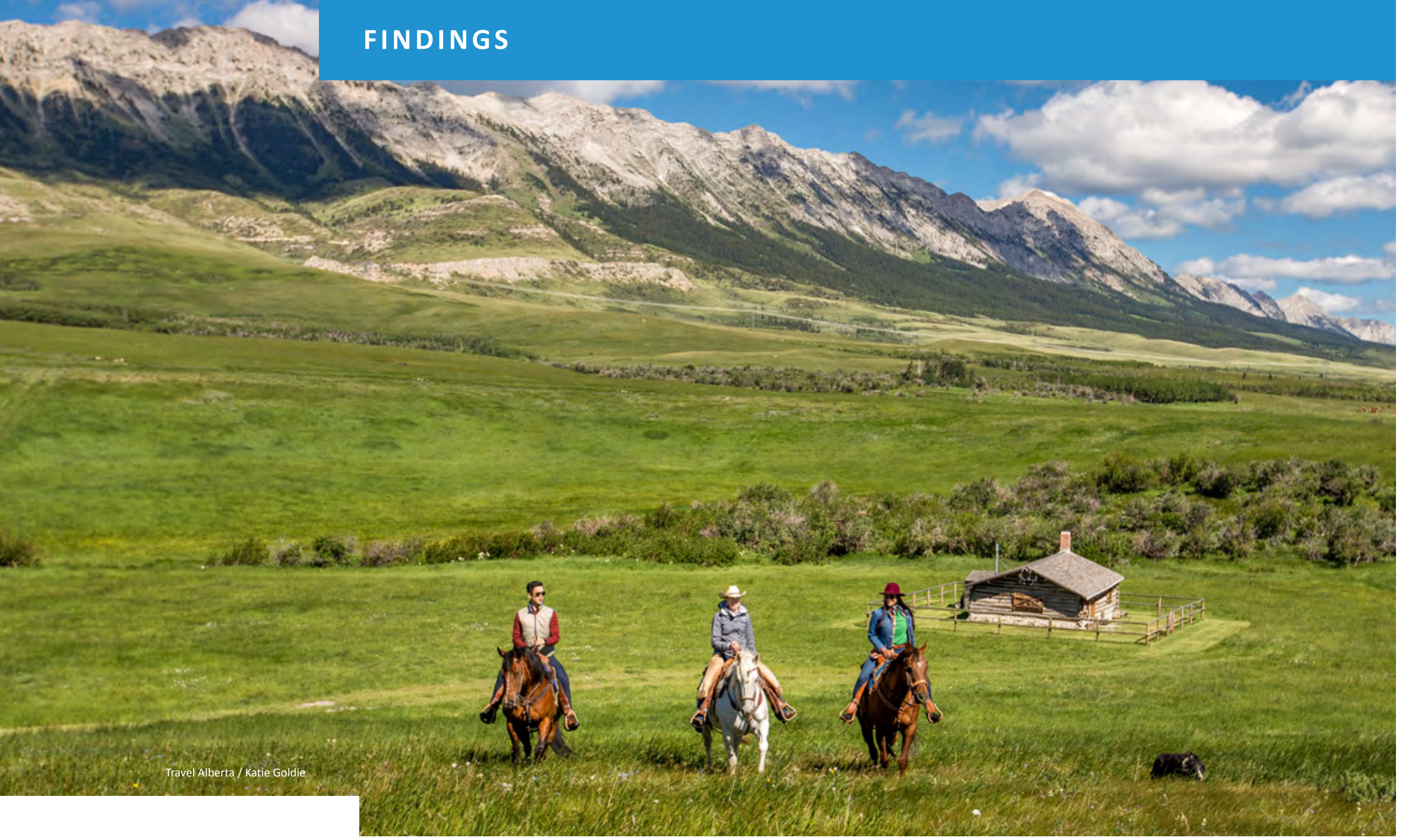
GDP data was most recently updated for the month of November 2022, and is only available at the national level. In November 2022, total GDP was 104% of the January 2020 levels. Tourism-related industries operated at 88% of January 2020 levels.

During the time frame of the project, GDP across all industries increased from October to November 2022 while GDP across tourism related industries remained essentially unchanged.

Gross Domestic Product: All industries and tourism related industries, Jan. 2020 to Nov. 2022 (national)[6]



5. Statistics Canada. Table 33-10-0270-01 Experimental estimates for business openings and closures for Canada, provinces and territories, census metropolitan areas, seasonally adjusted
6.Statistics Canada. Table 36-10-0434-01 Gross domestic product (GDP) at basic prices, by industry, monthly (x 1,000,000)



Travel Alberta / Katie Goldie

Immigration trends

Because of the nature of work permits in Canada, it is not possible to easily access a full register of all non-permanent residents and non-Canadians living and working in Canada. There is some program-specific information available, however: both the Temporary Foreign Worker (TFW) and International Mobility Program (IMP) are published by Statistics Canada with four-digit NAICS codes, making it possible to extract some basic descriptive statistics for the contributions of these programs to the tourism labour force in Alberta.

Temporary Foreign Worker program[7]

The TFW program is intended to be used to bring 'lower-skilled' workers into the country: those in NOC categories D and the 'lower' end of C in particular, using the NOC 2011/2016 classification system.

In Alberta, the size of the TFW program shrank from 2015 through to 2018, and had just begun to increase when the pandemic hit in 2019. By 2022, it had returned to 2015 levels. During that time, tourism's share of the TFWs coming to Alberta ranged between 21% and 38%, and was at 38.6% by the end of 2022 (that is to say, 38.6% of all TFWs in Alberta worked in tourism).

7. Statistics Canada. Canada – Temporary Foreign Worker Program work permit holders by province/territory of intended destination, intended occupation (4-digit NOC 2011) and year in which permit(s) became effective. Accessed via https://open.canada.ca/data/en/dataset/360024f2-17e9-4558-bfc1-3616485d65b9

Relative to the overall labour force, the tourism sector makes greater use of the TFW program than the provincial economy as a whole. Across the province generally, TFWs in 2022 accounted for 0.45% of the labour force, while in tourism, TFWs made up 1.94% of the labour force. This general pattern has held true since 2015, although the ratio has fluctuated in response to the contraction and expansion of the program more generally.

In 2015, the relative percentage of TFWs in tourism was around 3x that of the broader economy. It has generally fluctuated between approximately 3x and 4x higher in tourism since 2015, with 2022 having the highest yet (4.3x). This is not to say that there are 4.3x as many TFWs in tourism as there are elsewhere, but that the proportion of the labour force that are TFWs is higher in tourism by this factor.

Across the province generally, Temporary Foreign Workers in 2022 accounted for 0.45% of the labour force, while in tourism, Temporary Foreign Workers made up 1.94% of the labour force.

Temporary Foreign Workers in Alberta: Total economy and Tourism

	2015	2016	2017	2018	2019	2020	2021	2022
Total TFW (AB)	11,230	10,115	7,465	7,095	8,890	6,660	7,135	11,390
Tourism TFW (AB)	3,531	3,888	2,823	2,208	2,909	2,090	2,253	4,393
Tourism TFW (%)	31.4%	38.4%	37.8%	31.1%	32.7%	31.4%	31.6%	38.6%

TFWs in the Alberta labour force: Total economy and Tourism

	2015	2016	2017	2018	2019	2020	2021	2022
Total economy (AB)	0.47%	0.42%	0.31%	0.29%	0.36%	0.28%	0.29%	0.45%
Tourism (AB)	1.44%	1.66%	1.12%	0.86%	1.14%	0.94%	1.08%	1.94%

International Mobility Program[8]

The IMP program is intended to bring in 'higher-skilled' workers, particularly those in occupations in the 'upper' end of the NOC class C list, and higher (i.e. NOC B and A), using the NOC 2011/2016 system.

In Alberta generally, IMP is more widely-used than TFW, but the tourism sector makes less productive use of it. This may reflect the nature of the occupations that are in high demand in tourism, in that they are more often classed in the lower skill categories; it may also reflect generally higher awareness of TFW in the sector than IMP. The percentage of IMPs who work in tourism has been dropping steadily since 2015, with 2022 representing the lowest participation: only 2.7% of IMPs in Alberta worked in tourism last year.

The proportion of the tourism labour force that is comprised of IMPs in Alberta has been below 0.5% since 2016. It was at its lowest in 2020, and looks to be stabilizing around 0.4% over the past two years. In comparison, the total provincial economy incorporated 1.26% in 2022. Generally, the relative proportion of IMPs in the broader provincial labour force has been around 2x what it is in tourism, with that ration climbing to 3.2x in 2022.

International Mobility Program in Alberta: Total Economy and Tourism

	2015	2016	2017	2018	2019	2020	2021	2022
Total IMP (AB)	24,370	21,555	19,965	18,675	20,555	15,610	20,285	32,160
Tourism IMP (AB)	1333	1138	947	865	964	618	874	883
Tourism IMP (%)	5.5%	5.3%	4.7%	4.6%	4.7%	4.0%	4.3%	2.7%

IMPs in the Alberta labour force: Total Economy and Tourism

	2015	2016	2017	2018	2019	2020	2021	2022
Total economy (AB)	1.02%	0.90%	0.83%	0.77%	0.84%	0.65%	0.83%	1.26%
Tourism (AB)	0.54%	0.49%	0.38%	0.34%	0.38%	0.28%	0.42%	0.39%

8. Statistics Canada. Canada – International Mobility Program work permit holders by province/territory, intended occupation and year in which permit(s) became effective. Accessed via https://open.canada.ca/data/en/dataset/360024f2-17e9-4558-bfc1-3616485d65b9

ESDC Classification System

ESDC is rolling out a new classification system (NOC 2021) that uses six Training, Education, Experience and Responsibility (TEER) classifications (0 to 5, with 0 being the 'highest' skilled category and 5 the 'lowest'), replacing the earlier A-D categories. With the narrow window of opportunity to recommend changes in occupational classification to ESDC, it is possible that some tourism occupations could be nudged into a 'higher' category, making them eligible for IMP – which is administratively easier for employers as it generally does not involve an LMIA. This could induce more tourism operators to make use of this program.

General Discussion

This report synthesizes findings across the various components of the project, to present a discussion and develop a set of recommendations that addresses the contextualized labour crunch facing the tourism sector in Alberta.

The following sections explore some of the key themes that emerged across the surveys and the focus groups, where careful analysis of both quantitative and qualitative dimensions identified recurrent ideas, whether explicitly stated or arrived at inductively.

The four emergent themes discussed in the following sections are:

1. Housing and transportation crises
2. A need for strong regional bodies
3. The importance of raising the profile of the tourism sector
4. The need to change the business model(s) used in tourism

Three Underlying Pressures

Fundamental to these discussions, and to the recommendations that follow them, are three underlying pressures that cross-cut any analysis of labour market issues in Alberta. These are not confined to the tourism sector, although tourism by its nature may feel these pressures particularly strongly.


Travel Alberta / Youn Park

Population Demographics

The population of Canada is **aging:** people are living longer, and having fewer children. As the workforce ages, it is also shrinking. During the COVID-19 pandemic, many older workers left the workforce entirely, opting for an earlier-than-anticipated retirement, often to safeguard their health. Some of these workers may return to the labour force as health concerns continue to be alleviated, but many will not. With the loss of these experienced workers, businesses are **increasingly reliant on younger and less experienced workers**. Without careful succession planning already in place before the pandemic, however, there has likely been an interruption in the transmission of information about business practices and procedures. Coupled with a **shifting set of expectations** around work-life balance, and a particularly pronounced lack of social employability skills among those just entering the workforce, businesses will find it increasingly difficult to attract and retain employees in jobs that are seen as low-prestige, low-pay, and high-workload.

In a tight and competitive labour market, tourism as an employment sector is at a disadvantage, and needs to do a better job of highlighting the lifestyle benefits it offers, and rethinking labour and compensation costs.

In a tight and competitive labour market, tourism as an employment sector is at a disadvantage, and needs to do a better job of highlighting the **lifestyle benefits** it offers, and **rethinking labour and compensation costs**. With the right approach, or the right set of approaches tailored to different demographics, tourism may be able to regain lost ground, but this will require a shift in thinking across the sector as a whole.

Immigration

To offset the domestic demographic trends, the Canadian economy as a whole needs to bring immigrant workers into the country. There are a number of different programs available, some administered **federally** and others delegated to the **provincial** level (such as the different streams available under the Alberta Advantage Immigration Program); some are intended for **short-duration guest workers**, and others are positioned as stepping-stones towards establishing **permanent residency** in Canada. Different types of tourism business have different needs, and in principle, there are programs available to meet each of those different needs. In practice, however, the picture is more complicated.

Application Processes

Application processes are complicated, expensive, and can take months to be processed, meaning that many small and medium enterprises (SMEs) simply **do not consider immigration** as a viable source of employees for their business. Large businesses, particularly those that have dedicated HR personnel, may have better luck in using temporary immigration programs, but even they tend to find it cumbersome, and many businesses that have successfully found workers through closed-visa programs (such as the Temporary Foreign Worker program [TFW]) report that, as soon as workers are granted their permanent residency, they quit. On paper, permanent residency should take two years, but government initiatives to speed this up have been inconsistently applied. Consequently, some businesses that have invested considerable money into TFW employees on the assumption that they would have then for two full years have lost them within a year, which disincentivizes these business operators from re-engaging with the process in the future.

Job Skill Classification

Many tourism jobs are considered low-skilled (NOC codes C and D under the 2016 ESDC classification system, which have been largely reassigned to TEER levels 4 and 5 in the 2021 system), limiting which programs are available for some of most in-demand jobs in the sector. There is a brief window in which ESDC is open to reclassifying some jobs, so it may be possible to have some of these occupations moved into a **more 'skilled' TEER category,** which would open up a wider range of accessible programs. However, it is unlikely that all such jobs can productively be reclassified. Another avenue for change would be the establishment of a **dedicated tourism immigration program**, using the agricultural program as a precedent. Such a program could streamline application processes, reduce the administrative load on businesses, and eliminate costly and bureaucratic exercises such as the Labour Market Impact Assessment (LMIA). There have been productive discussions at various levels of government about the importance of such a program, but no concrete steps have yet been taken, at either the federal or provincial levels. A number of **temporary changes** were implemented in late 2022, which are anticipated to have a positive impact on the summer 2023 peak season in Alberta. Tracking such impacts (whether positive or negative) on net immigration in the province will likely be important evidence in lobbying for more permanent changes to be made.


Travel Alberta / Chris Amat

Mental Health

Although the COVID-19 pandemic is not ‘over’ in any real sense, many businesses – tourism ventures included – have reopened with few or no restrictions in place. Traveller and visitor demand has certainly surged, although given the current labour crisis facing the tourism sector, it remains unclear whether this high demand can actually be met in 2023. Stress and burnout remain real threats to workforce stability, with both long-term and new employees equally vulnerable.

Pandemic Outcomes

For those who continued to work throughout the pandemic, often taking on multiple roles to keep businesses open while operating at dramatically reduced capacities, they are already nearing burnout. As business ramped up in 2022 – and this is projected to rise sharply again in 2023 – these workers continued to do multiple jobs even as capacities increased while staffing levels remained static: more work being done by fewer people, at a time of enormous personal and cultural stress. Most businesses who participated in this project reported losing a lot of front-line staff at the height of pandemic restrictions, but managing to hang onto mid-level management and supervisory positions to a greater or lesser extent. These workers are now reaching breaking point, and if they leave, they will take with them an inestimable wealth of institutional knowledge – and few businesses can afford to lose that level of operational know-how.

These threads of poor mental health that permeate all levels of the tourism workforce, from entry-level workers through mid-level management and into executive levels

New Workers

For newer workers, particularly those whose late teens or early twenties were spent under pandemic restrictions, work itself may be inherently stressful. Many of these young workers have not had enough real-life experience to have built up core skills around interpersonal relationships, conflict resolution, or communication, and their school experiences were likely shaped by a culture of accommodation and adaptation that has left them ill-prepared for the realities of working in a service industry. Managers have reported frustration with low engagement among these young workers, as well as aversion and avoidance of any kind of conflict, a lack of initiative, unreliability (such as not turning up for shifts), and an unwillingness to take responsibility for their actions or inactions. Some of these skills should not be the responsibility of a tourism operator to teach, because in the past, people have acquired them through school, volunteering, and part-time jobs; however, in the current context of an ongoing pandemic, many youths have not had the opportunity

to acquire them independently, so they must become part of on-the-job training. This puts more pressure on managers and supervisors, who have not been trained in how to teach these skills, and the costs in terms of mental health across the workforce risks growing exponentially.


Travel Alberta / Chris Amat

Mental Burnout

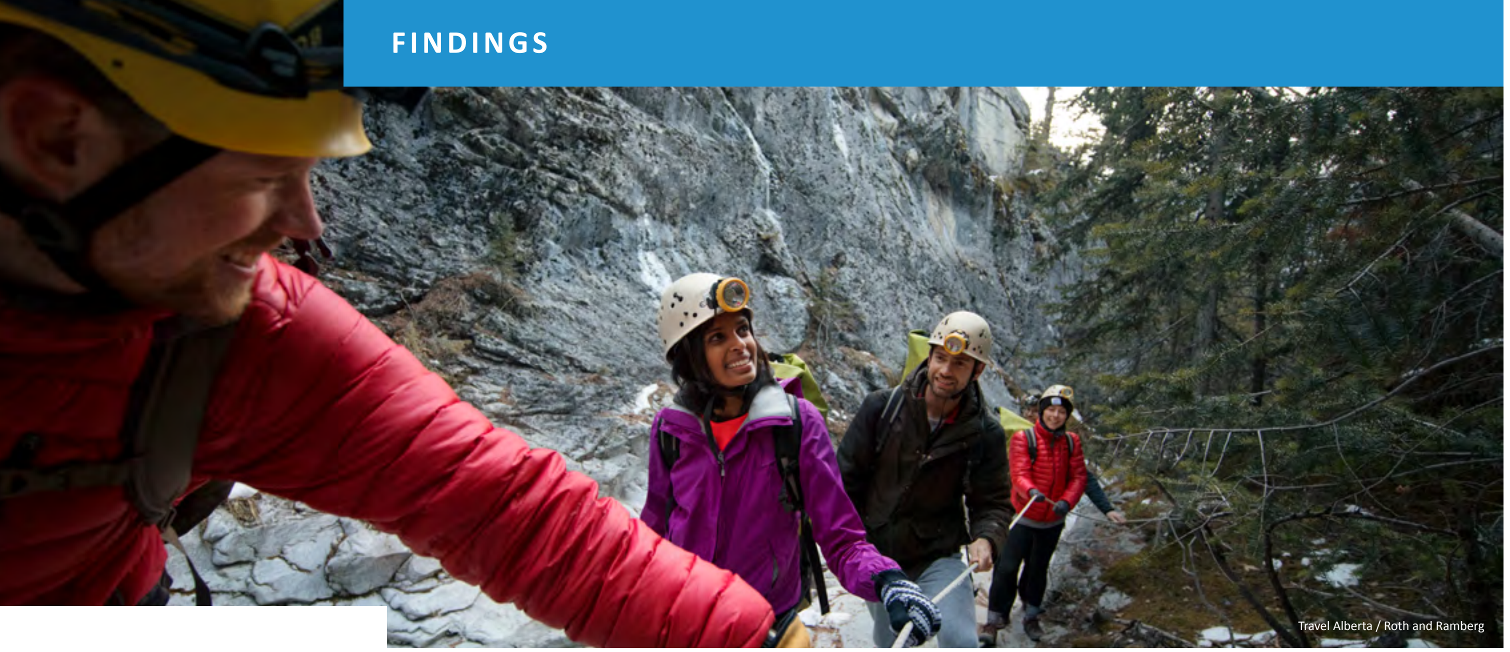
Even at high levels of management, where workers are not dealing with customer frustrations on a day-to-day basis, mental health issues present challenges. CEOs and other executives have steered their businesses through turbulent waters, often taking on extraordinary financial burdens that they are no longer confident of being able to manage in the short- or long-term. This affects them as individuals, as well as leeching downwards into the rest of their employees.

This high-level exhaustion and mental burnout also affects how the sector is perceived from outside. It even affects how the sector is perceived by people who are dedicated to tourism: two people at separate focus group sessions spontaneously remarked on the levels of exhaustion and disengagement from industry leaders:

I’m hearing from all of you that ***we’re not even reallyfully supportive of hospitality being a career,*** *[…] that these are not careers that young people should aspire to.*

So even amongst ourselves, we don’t even praise our industry, careers in our industry. ***We’re not even promoting it amongst ourselves.***

These threads of poor mental health that permeate all levels of the tourism workforce, from entry-level workers through mid-level management and into executive levels, speak to a **long-term precarity** that must be addressed in order for the sector to survive the coming years of continued change and adaptation. Addressing labour shortages will relieve some of that pressure, whether through changing the narrative about working in tourism or through improved access to immigrant workers, but the sector and its constituent industry groups need to invest in the mental health of everyone involved in the sector. New business models and HR practices must evolve to incorporate this dimension of wellbeing.



Travel Alberta / Roth and Ramberg

Housing and Transportation

On the one hand, issues of housing and transportation – core infrastructure needs for the province and its constituent regions and municipalities – are clearly beyond the scope of the tourism sector to fix. Addressing these systemic needs will require sustained investment on the part of governments and the private sector, and the benefits of improving access to both will have a larger impact than just on the tourism sector. On the other hand, because of where and when many tourism businesses operate, the sector is arguably **disproportionately affected** than some other sectors. There are tourism businesses in every municipality in the province, as well as in many rural and remote areas; some businesses are seasonal, while others operate year-round; there is often a mix of full-time, part-time, and casual employees; some have regular business hours while others operate around the clock. This diversity of business models complicates access for employees to both housing and transportation, in different ways.

The lack of affordable, available, or accessible housing and transportation across Alberta directly impacts tourism businesses in terms of who they are able to employ, and who is able to work in tourism.

Rural and Remote Areas

In **rural and remote areas**, including inside national and provincial parks where there may be strict limitations on development, the core issue on housing is likely one of availability: there are a fixed number of units, with restrictions on building more. This can drive up the price on the few rentals that there are, and forces many workers (particularly those who are not working full-time or year-round, and have less income to spend on housing) to live further away, and commute. There may or may not be some form of mass transit in these areas, but where there is, it is unlikely to meet the needs of workers on a daily basis. This means staff need to use their own private transport – likely a car, particularly outside of summer months – which is an added financial burden that may make some jobs impossible to sustain for some workers.

Urban Areas

In more **urban areas**, the primary housing issue may be affordability: units in a city's core may be priced for professional incomes, while many who work in tourism do so at substantially lower wage rates, which again pushes workers to live further out and commute. Cities have more transit options available than rural areas, but transit schedules rarely run around the clock, meaning shift workers and workers who close late-night events are likely left with no public transit options. With remote-work options become more widely available across Canada, there has also been an influx into Alberta of new residents with relatively high spending limits, adding even more pressure to an already tight housing market.

Affordability

The lack of affordable, available, or accessible housing and transportation across Alberta **directly** impacts tourism businesses in terms of who they are able to employ, and who is able to work in tourism; but it **indirectly** impacts the sector in other ways. It affects whether or not a business can make use of immigration programs to hire international workers: they cannot bring new people into a community that cannot house them. Some businesses may be able to provide short-term housing for temporary workers, but if there is no capacity for these temporary workers to secure long-term accommodation independently, they will not stay in the community as they transition to permanent residency. These pressures parallel those of co-op/work placement terms for post-secondary students, which can impact both their experience as students and their likelihood of staying in the tourism sector after graduation.

Some businesses are able to **subsidize** housing and transportation for their employees, as part of a comprehensive total compensation package, but this is not a viable solution for all operators. Developing employee-sharing programs between businesses with complementary seasons – for example, a ski resort and a golf course jointly hiring one person to work six months of the year at one business and six months at the other – may serve to ease some of these local pressures. Employees in such a scheme would have full-time, year-round work, granting them more financial stability; and there would be fewer individual people looking for housing.

Ultimately, the **desirability** of working in tourism is tied to whether or not a tourism job will give someone a life they want to lead, and access to housing is a core component of that evaluation. If someone can't effectively afford to work in a particular job, they will find work elsewhere, and those with tourism experience are actively sought-after by other sectors.

A Need for Strong Regional Bodies

Sector Needs

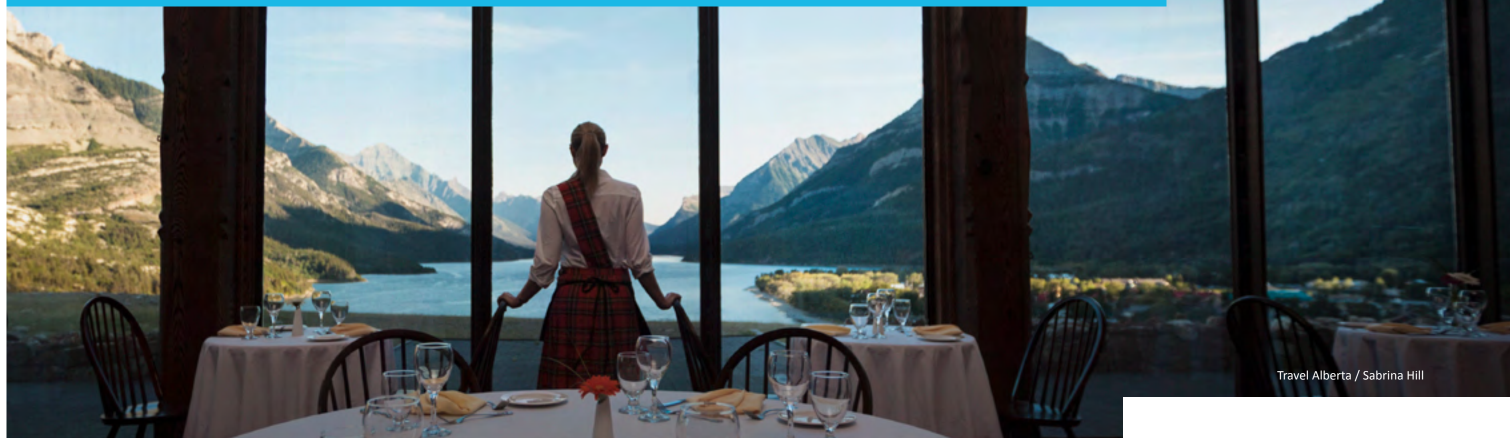
Alberta boasts some of the most extraordinary landscapes and attractions in the country, the diversity of which makes it difficult to talk about 'tourism'

The province of Alberta boasts some of the most extraordinary landscapes and attractions in the country, the diversity of which makes it difficult to talk about 'tourism' in a comprehensive sense at the provincial level. There are some foundational areas where provincial discussions are appropriate – around labour laws, or taxation for operators, or about issues that are fundamentally legislative. But this does not cover the full scope of the needs of the tourism sector, and what a business operating in Banff needs is likely very different from what is needed in Drumheller or in Fort McMurray. Across the second set of focus group meetings, discussions around solutions included a repeated call for **sector bodies** that operated above the level of the municipality, but below that of the province. These bodies would act as a local resource hub for regional tourism operators in the catchment area:

- coordinating the pooling of resources across and between businesses: jointly contributing to training costs, co-subsidizing housing for staff, disseminating industry tools and materials, etc.
- facilitating employee sharing programs between businesses
- developing and supporting standardized HR practices within the region

Destination Management Organizations (DMOs)

In many respects, **Destination Management Organizations** (DMOs) are a good fit for these requirements, particularly in regions prioritized by government for tourism development (Tourism Development Zones [TDZs]). In non-prioritized regions, establishing a DMO is likely beyond the means of local operators, but the need for resource-sharing and mutual support is just as strong. A centralized body – whether a DMO or something distinct – would also bolster the visitor economy in an area more generally. It could help address housing issues in tight markets, by coordinating (for example) renting units and subletting them to participating businesses, either wholly or in part. It could also act as the public face of tourism in the local area, raising the sector's profile against other regional sectors, and representing tourism as a career destination in schools, with career counsellors, and at job fairs.



Travel Alberta / Sabrina Hill

Destination Management Organizations and Immigration

One area that DMOs would not adequately meet the needs of such communities or businesses is around **immigration**. Current short-term immigration streams, such as the Temporary Foreign Worker (TFW) program, work as a binding contract between an employer and an employee, for a fixed period of time. The inflexibility of these programs means that the conditions of employment cannot be changed – a worker cannot be given a raise, allowed to change jobs, or promoted. This model may work adequately for large businesses that operate year-round, but it presents difficulties for smaller operators where employees inherently work across different positions, and also for some seasonal operators where the cost of engaging with the TFW process is disproportionate for the duration of the contract. Granting the proposed regional bodies some **administrative power** or **legal status** with respect to immigration (such that they could, for example, act as the 'employer' for visa purposes and manage the workers' assignment across different local businesses) would radically change the accessibility and utility of these programs across the province.

This would benefit local operators, and the regional tourism economy, in several ways. It would allow smaller businesses to engage with programs such as TFW; it would centralize the application process, making it more accessible for SMEs without a dedicated HR team; it would permit several businesses to benefit from each TFW application; and it would (managed appropriately) alleviate some of the seasonal peak-trough staffing problems that are particularly acute in some areas and businesses. If the immigration portfolio were seen as a sub-set of a broader **employee-sharing program**, an efficiently-run organization could fundamentally change how businesses manage their seasonal and temporary workforces. Pilot programs that have trialed this kind of employee-sharing system[9] found that success in large part depends on consistent HR practices between businesses, so these new bodies could also work with local operators to improve and coordinate HR training and programming.

9. The Conseil québécois des ressources humaines en tourisme (CQHRT) has conducted two pilot studies in several regions in Quebec. A preliminary report was presented at the Labour Market Forum in September 2022.

Travel Alberta / Mike Seehagel

Raising the Profile of the Tourism Sector

Most Albertans agree that tourism is an important part of the provincial economy, but at the same time they are reluctant to work in it themselves.

Overlapping Dimensions

There are two overlapping but distinct dimensions to the profile of the sector: one is **governmental** (how governments at various levels understand, and engage with, the sector and the businesses that it comprises) and one is **general** to the population more broadly (how ordinary Albertans perceive the sector, as a part of the economic landscape and as a place of employment). There is common ground between these two dimensions, where the lack of a coherent grasp of the sector – public or official – makes it difficult to get people to engage with it as a substantial part of the economy. The tourism labour force in Alberta (people over 15 either working, or looking for work, in the tourism sector as defined by the Tourism Satellite Account) accounted for 9.1% of the total provincial labour force in 2022[10]; in 2019, it was 10.3%[11]. But because the industries that make up the sector are so disparate, the scale and scope of the sector is often not immediately visible.

Statistical Reporting

The statistical reporting of tourism is generally restricted to the Food and Beverage Services and Accommodations industry groups (often referred to as “tourism and hospitality”). This is at least partly because of how industries are coded by Statistics Canada: it is possible to group these two together easily under one two-digit code, while the other industry groups need to be manually identified, which is not always possible at a higher granularity than the three- or four-digit code that the Tourism Satellite Account uses. In fact, Accommodations and Food and Beverage Services taken together account for only around 57% of the total tourism labour force: **more than four in ten tourism jobs are rendered invisible by the way that the sector is publicly framed**.

10. Statistics Canada. Labour Force Survey, 2022 annual, customized tabulations.
11. Statistics Canada. Labour Force Survey, 2019 annual, customized tabulations.

This has clear implications for government policy, where the commonly reported statistics on the sector underestimate its size as a matter of course. The economic footprint of the full range of industries and businesses is undervalued, making it a lower priority for policy-makers and other key players in the provincial economy. Bodies such as TIAA are consistent in their messaging about the actual reach of the sector, but these messages have not yet reached enough people to sway political decision-makers, at least not outside of the specific ministries and departments that are responsible for the sector.

Undervaluing of Sector

In parallel to this official undervaluing of the sector, there is a social and cultural undervaluing of the sector as well: perception and sentiment surveys consistently report that people hold tourism jobs in low esteem, and see them as starter jobs rather than career destinations. They consistently report that the **pay** is too low for the work, and **scheduling** realities make it a hard sector to stay in for a long time. Most Albertans agree that tourism is an important part of the provincial economy, but at the same time they are reluctant to work in it themselves. This is also mirrored in lowering rates of engagement with tourism post-secondary education programs, and with the attrition from the sector of graduates of those programs.

Travel Alberta / Mike Seehagel

Public Misunderstanding

Public misunderstanding of the sector, and of the employment opportunities it affords, is one reason for this disinterest. Public campaigns to highlight the range of possibilities in tourism are either in the field or are in preparation from many sector organizations. These campaigns tend to showcase the range of possible **career trajectories** in tourism, as well as the **lifestyle benefits** of working in the sector.

Given the severity of the current labour crisis in tourism, care must be taken that these campaigns are reaching the right demographics: youth who are considering what they can study and where they can work, parents and career counsellors who guide people through the process of choosing a career path, educators who design tourism and hospitality programs and curricula, school teachers who introduce children to jobs and career possibilities, people who are currently working in other sectors who would like a change, people already working in the sector who are unaware of the range of options they have before them, and tourism operators who may be unaware of how best to retain and support the staff they currently have. These campaigns also must not stand alone: they must become integrated into recruitment, retention, and compensation discussions within the sector itself, so that businesses align with the promises being made by these campaigns.


Tourism Calgary

Changing the Business Model in Tourism

Traditional Method


Travel Alberta / Hubert Kang

The tourism sector has tended to adopt a traditional model when it comes to weighing up business expenses, where **labour expenditures are seen as costs,** plain and simple: money leaving the business. This way of thinking tends to propagate practices that don't treat employees particularly well – one way to increase profit is to reduce costs, so businesses pay their staff the lowest wage they can reasonably get away with. This makes a certain kind of financial sense, but it is short-sighted in a business that is inherently people-centered. When staff feel they are being exploited or undervalued, their loyalty to the business is lowered and they are more likely to leave when they see a better opportunity before them. This impacts businesses directly, who have to continuously train new employees as their more senior ones leave, but it also has an indirect cost in terms of perceptions of jobs in the sector: low wages, hard work, and high turnover contribute to **common narratives** of tourism jobs as low-prestige and unpleasant.

Staff as an Investment

Businesses need to **think of their staff as an investment**, rather than as a cost. Money spent on their employees will return to the business through customer satisfaction and an increase in visitors/foot traffic. Staff who feel they are well-treated are more likely to enjoy their job, to stay in their job longer, and to be better employees. In tourism, this translates into an enhanced visitor experience, whether that is at a hotel, immersed in a cultural milieu, or on a wilderness adventure.

More research is needed to fully understand how to implement this kind of philosophical change at the business level. **Economic modeling** will need to demonstrate the lost profit due to unhappy staff, high turnover, lower overall staff numbers, and negative customer experiences. It will also need to demonstrate the return on investment of increased staff training, improved total compensation packages, and supporting employees' personal and professional development.

Businesses need to think of their staff as an investment, rather than as a cost.

Total Cost of Accounting Approach

This **total cost accounting** approach will require a substantial shift in how the sector thinks about business operations, and operators will need access to more fine-tuned and responsive financial tools to adopt these new practices in their own businesses. Many businesses will likely need to change the range of products that they offer: working with a smaller but better-paid staff will mean scaling back some offerings, and raising the price – moving from a quantity-based revenue stream (e.g. lots of low-paying visitors) to a quality-based one (e.g. a much smaller number of visitors who spend more money). Visitors to higher-end, and higher-cost, accommodations, restaurants, and attractions will expect a higher level of service, which will mean investing more in training and retaining staff.

Sustainable and Regenerative Practices

Sustainability can be understood not only environmentally, but also in terms of the workforce.

These shifts in economic thinking will also provide operators with an opportunity to shift their **sustainable and regenerative practices** as well, which visitors are increasingly going to expect, and for which they will be willing to pay a little bit extra. Sustainability can be understood not only environmentally, but also in terms of the workforce.

Travel Alberta / George Simhoni

Banff & Lake Louise Tourism / Paul Zizka

Recommendations

Notes on Recommendations

Many of the issues that emerged in this research, and that have informed the analysis, are too big and too far-reaching for the tourism sector to address alone.

Many of the issues that emerged in this research, and that have informed the analysis, are too big and too far-reaching for the tourism sector to address alone. However, there are nevertheless changes that relate to the sector that can help alleviate some of these pressures.

The following pages list a number of recommendations, grouped around the themes of Immigration, Education, Workforce infrastructure, HR practices, and Reputation. In each of these areas, a number of recommendations are presented. The thematic categories are not entirely independent: there is some cross-pollination that serves to illustrate the fundamentally interconnected nature of the challenges facing the tourism sector.

It is not anticipated that all of the recommendations presented here be implemented within the next five years. Political, social, and economic drift can change the priorities within the sector, and even if the path ahead were fixed, the workload associated with the full complement of recommendations is likely beyond the scope of TIAA in its current manifestation. The recommendations can be understood as a menu of possibilities: any subset or combination will help address the needs of the sector, so choosing which to focus on is a question of **priority, capacity, resourcing and responsiveness to new issues** that arise in Alberta's visitor economy.

Immigration

Changes to the various immigration streams and programs currently available will involve careful work with industry bodies and both provincial and federal governments. Changes will likely be slow to be implemented.

Education

Recommendations around education range from engaging with elementary schools to raise sector/industry awareness, through to modifying the post-secondary programs on offer.

Workforce Infrastructure

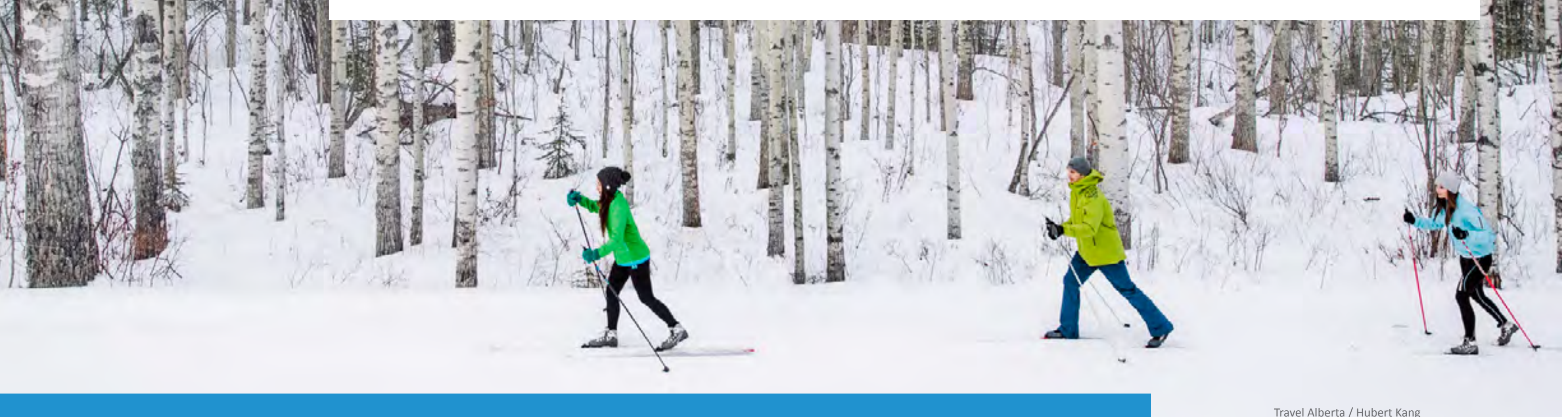
The infrastructure needs addressed in these recommendations address structural changes to how the tourism sector organizes its engagement with the workforce.

HR Practices

Changes to improve the labour force crunch in tourism necessarily include changes in how businesses are managed. Upskilling operators in new business practices, and changing the economic model used in tourism, will improve business conditions, particularly for SMEs.

Reputation

Changing the narratives of tourism will improve the sector's employment prestige and awareness of its economic footprint in the province.



Travel Alberta / Hubert Kang

Immigration Recommendation	
1.1	Evaluate NOC 2021 TEER classifications of high-demand tourism jobs, and recommend changes to ESDC to reflect the actual requirements of the occupation in the context of Canadian tourism.
1.2	Collate, curate, and distribute a best-practices toolkit/guide for SMEs who have never used immigration programs (federal and/or provincial) before.
1.3	Arrange temporary LMIA exemptions for tourism occupations that have a consistent track record of approval in the province.
1.4	Increase tourism's share of temporary international workers (TFW, IMP, IEC) who are employed Alberta.
1.5	Increase Alberta's share of immigrants who come to Canada through existing immigration programs.
1.6	Amend working conditions in TFW program to (a) allow job flexibility within a sponsor's business, and (b) to be consistent in time frame for PR status being granted.
1.7	Develop dedicated immigration streams for tourism: temporary (seasonal sponsorship across multiple years, no LMIA) as well as permanent (with stepped shift to PR to retain workers in sector for longer)
1.8	Grant legal status to dedicated regional organizations to act as sponsors for temporary work visas, with workers able to work for more than one business within the organization's membership network.

Education Recommendation

2.1	Increase sector participation in education programs to raise career awareness: develop materials for elementary through secondary school, engage with mediators (e.g. teachers, guidance counselors), strengthen links between businesses and PSEs.
2.2	Explore the scope for new private vocational colleges offering tourism training programs through non-traditional structures (e.g. sequenced micro-credentials, work experience accreditation, etc.).
2.3	Realign public PSE tourism programs with industry needs, particularly around timing of work experience and co-op placements.
2.4	Diversify pathways to formal educational accreditation and recognition of acquired skills in tourism industries (e.g. apprenticeship, work experience recognition, micro-credits).
2.5	Expand Alberta graduate visas to (a) graduates of private colleges and (b) graduates of tourism programs outside of Alberta.
2.6	Introduce financial incentives for tourism graduates to stay working in sector, such as student loan forgiveness or repayment assistance after 4 years of continuous work, or wage top-up (similar to early childhood educators).
2.7	Increase awareness of multiple pathways to professional careers in tourism through accumulated micro-credentials or other sequenced programs, as these programs are rolled out.

Workforce Infrastructure Recommendation

3.1	Standardize use of competency-based occupational standards across the Alberta tourism sector.
3.2	Incentivize tourism businesses to provide or subsidize housing and transportation for employees, through government subsidy, tax credits, or other financial regulatory mechanisms.
3.3	Establish regional or municipal bodies to provide local centralized services to businesses, to support immigration applications, to provide HR and financial training to operators.
3.4	Develop local employee sharing programs in businesses with complementary seasonal employment demands, to be able to offer full-time year-round work spread across multiple employers.
3.5	Address chronic and varied housing and transportation issues at local, regional, provincial, and federal levels.

HR Practices Recommendation

4.1	Provide training to SME operators in HR and financial practices.
4.2	Standardize approaches to diversity, equity and inclusion (DEI), mental health supports, and sustainability across tourism operators.
4.3	Conduct economic modeling research into ‘cost’ of labour on tourism businesses, with respect to turnover/retention, customer satisfaction, product offerings and prices, customer profile, and taking into consideration different compensation levels and structures.
4.4	Develop tourism-specific total cost accounting processes and practices.

Reputation Recommendation	
5.1	Launch campaign to highlight range of career trajectories and skills development opportunities in Alberta tourism.
5.2	Develop messaging and resources for engaging meaningfully with job mediators (e.g. parents, teachers, counselors, staffing agencies, etc.) to raise profile of sector as more than entry-level employment.
5.3	Conduct research to collect comprehensive data on economic and social scope, impact, and reach of sector, to inform advocacy and support policy recommendations.
5.4	Develop targeted recruitment and retention campaigns for different demographic profiles of tourism workers.
5.5	Professionalize sector through recognized accreditation and certification.
5.6	Change social and cultural narratives around tourism as an important economic driver and as a career destination.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