



# CHAMPIONING RESILIENCY

## 2023 Report to Members

Tourism Industry Association of Alberta (TIAA)

# MESSAGE FROM THE PRESIDENT & CEO



John Price

As I reflect back on 2023, there is renewed sense of optimism as Alberta's tourism spending recovered two years ahead of schedule. This sense of optimism is what drives TIAA to continue to advocate for and raise awareness of the potential of Alberta's visitor economy as a driver of job creation and economic diversification for the province.

To TIAA members, we thank you. Having such a wide cross-section of industry partners has certainly emboldened our advocacy and communication messaging to the Government of Alberta and we will continue to build on this success in 2024.

Informing Provincial Tourism Priorities: TIAA's efforts in 2024 will continue to be strategic and focused on activities that ensure Alberta's tourism industry is well-positioned for sustainable growth. TIAA is pleased recent government mandates have been supportive of tourism as an economic sector. Parks Canada reaffirmed their commitment to support Indigenous tourism businesses through the Indigenous Tourism Association of Canada's The Original Original Accreditation Program, ensuring continued support for Indigenous tourism.

If you're not yet a TIAA member, I would be pleased to meet with you to explain the many agendas we are working on in support of building a larger tourism ecosystem that drives business and jobs growth.



Darren Reeder, President & CEO  
E: [darren@tiaalberta.ca](mailto:darren@tiaalberta.ca)  
C: 403.493.8682

## TIAA BOARD OF DIRECTORS (2023-2024)

**Alisha Reynolds, Vice President, Development (North America)**  
(TIAA Board Chair)  
Northland Restaurant Group  
Sector Represented: Member at Large

**Dan DeSantis, Area General Manager**  
(TIAA Vice Chair)  
Calgary Airport Marriott In-Terminal Hotel, Delta Hotels Calgary Airport In-Terminal, Westin Calgary Downtown  
Sector Represented: Accommodation

**Jace Anderson, Executive Director**  
(TIAA Treasurer)  
Tourism Medicine Hat  
Sector Represented: Destination Marketing/Management Organizations

**Renée Williams, Senior Vice President**  
Fort Edmonton Management Company  
Sector Represented: Attractions & Events

**Arlindo Gomes, Vice President, Venues**  
Edmonton Convention Centre, Edmonton EXPO Centre  
Sector Represented: Meetings, Conventions & Incentive Travel (MCIT)

**James Overall, Dean, School of Hospitality & Tourism**  
Southern Alberta Institute of Technology  
Sector Represented: Post-Secondary

**Dan Arndt, President**  
ZZA Hospitality Group  
Sector Represented: Food & Beverage

**Stuart Back, Chief Operating Officer**  
PURSUIT Banff Jasper Collection  
Sector Represented: Travel Trade

**Brett Ireland, CEO**  
Bearhill Brewing  
Sector Represented: Retail

**Simon Elliott, Director Destinations**  
Rocky Moutnaineer  
Sector Represented: Transportation

**Matricia Bauer, CEO**  
Warrior Women  
Sector Represented: Indigenous

# ADVOCATING FOR INDUSTRY

Over the last year, TIAA has worked tirelessly to ensure Alberta's visitor economy is well-positioned for recovery and growth. Our primary goal is to move the province one step closer to its goal to double tourism revenues by 2035.

## LEADING THROUGH GOVERNMENT CHANGE:

This year, Alberta saw a provincial election, creating a time of government transition. TIAA spent a significant amount of time educating MLAs on the visitor economy while continuing to strengthen strategic connections with elected officials, government officials, and Cabinet members within Premier Smith's new administration, as well as with Official Opposition members in key critic roles.

On the heels of the election, the government released ministerial mandate letters which provided objectives and direction for government officials. TIAA provided an analysis of those mandates and has linked them back to the strategic priorities of the industry, keeping us abreast of relevant changes.

Notably this alignment showcases the multi-ministerial approach that TIAA is applying to provincial advocacy. Tourism and related development concerns touch 19 Ministries across the government, impacting over 40 policy areas.

## ADJUSTING TO NEW LABOUR REALITIES:

In 2023, TIAA released a Labour Study Report, completed in collaboration with HR Tourism Canada. This document provided a set of recommendations to support and strengthen the tourism labour environment and TIAA will be using the information gleaned from the study to conduct additional research on how to align purpose, profit and sustainability to compensation culture within the tourism industry.

The labour study suggests that there is much work to be done to develop a future talent pipeline that will support the desired growth of Alberta's visitor economy. Through TIAA's advocacy efforts, and in partnership with other industry associations, the tourism industry in Alberta has secured a dedicated tourism stream through the Alberta Advantage Immigration Program. TIAA's focus in the coming year will be to monitor the province's release of the dedicated AAIP stream and continue to promote systemic provincial funding for tourism career development and marketing opportunities.



DID YOU KNOW  
THERE ARE OVER  
40 POLICY TACTICS  
SPANNING 19  
MINISTRIES THAT  
INTERSECT WITH  
TIAA'S INTERESTS?



Travel Alberta/ROAM Creative

# ADVOCATING FOR INDUSTRY

## PREMIER'S SKILLS COUNCIL:

Securing, engaging, and retaining a proficient workforce in the tourism sector is crucial for the continuous recovery and expansion of Alberta's visitor economy. As the tourism industry adapts to evolving business requirements and operational models, TIAA emphasizes the need to modernize education and training programs.

Through his role on the Premier's Skills Council, TIAA President and CEO, Darren Reeder, advises the government on skills development systems and policies that will be needed to transform Alberta's economy in the tourism and hospitality sector space.

## ADVOCATING FOR THE DEDICATION OF THE ALBERTA TOURISM LEVY:

TIAA believes that purposeful investment in the province's visitor economy will assist in advancing the government's twinned aims of economic diversification and rural economic development.

In 2023, TIAA called on the Government of Alberta to decisively respond to the industry's long-standing and consistent recommendation to dedicate the full value of the Alberta Tourism Levy to Travel Alberta to support tourism-related growth.

This request was crystalized in Minister Schow's mandate letter from Premier Smith, and the government has committed to assessing the pros and cons of committing the full amount of the Tourism Levy to Travel Alberta.

### Jobs Generated per \$1,000,000 of Output



### FACT

The average number of jobs created per million dollars of output in the tourism industry is 9.29, compared to 6.9 for the economy as a whole

## A NEW ECONOMIC REALITY:

In November 2023 the Province of Alberta released updated tourism economic indicators showing that the industry had exceeded pre-pandemic revenues reaching \$10.7 billion in spending throughout 2022—well ahead of the forecasted schedule outlined in Travel Alberta's Bootstrap Plan.

While revenues are up, margins have been impacted due to the new economic reality of high inflation and high interest rates. The TIAA Leger 2023 Summer Pulse Survey indicated that just 60% of operators felt positive about the upcoming year, down from 72% in February 2023.

Paired with 41% of Alberta tourism businesses still carrying COVID-related debt, the top three challenges impacting the majority of operators are inflationary impacts, labour supply and rising energy costs. The success of Travel Alberta's Bootstrap plan indicates the need for a continued coordinated policy and investment approach to tourism development.

## MANAGING MARGINS

TIAA'S SUMMER PULSE SURVEY REVEALED 41% OF RESPONDENTS ARE STILL CARRYING PANDEMIC-RELATED DEBT



# ADVOCATING FOR INDUSTRY

## MINISTRY OF TOURISM AND SPORT:

Following the fall provincial election the government of Alberta established the Ministry of Tourism and Sport providing industry and government with a coordinating Ministry for Tourism and Sport activities throughout the province.

Minister Joseph Schow was appointed as the new Minister of Tourism and Sport, and TIAA hosted the minister around tables in Calgary and Edmonton, introducing him to stakeholders from the region and showcasing the best of travel and tourism the area has to offer.

## EI PREMIUM INCREASES:

In May, the Tourism Industry Association of Alberta (TIAA) reached out to Minister Qualtrough and again in August to Minister Boissonnault, seeking the Government of Canada's intervention concerning the \$23.6 billion deficit in the Employment Insurance (EI) program.

TIAA ascertained that the Alberta's tourism industry portion of the EI deficit (over \$116 million) emerged from the temporary EI measures initiated in response to the COVID-19 pandemic, succeeding the Canadian Emergency Response Benefit (CERB)— a cost TIAA continues to assert that businesses should not have to bear.



## TIAA'S 2023 OTTAWA HILL DAY:

TIAA's inaugural Ottawa Hill Day was a resounding success. More than 34 Alberta delegates engaged in productive dialogue with Parliamentarians and federal government officials, participating in 16 meetings across 8 ministries.

Officials heard from our delegates about the issues facing the Alberta tourism industry and our strategies for a sustainable, flourishing visitor economy. Hill Days played a crucial role in tackling Alberta's specific concerns, promoting essential policy messages relevant to the province, and improving Alberta's standing in Ottawa.

Courtney @courtneywithcamera

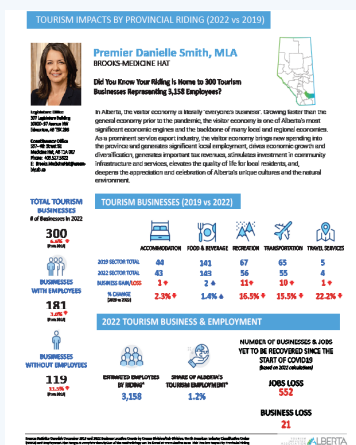
# ADVOCATING FOR INDUSTRY

## TOURISM IMPACTS BY PROVINCIAL & FEDERAL RIDINGS:

Using the latest Statistics Canada insights, TIAA refreshed the data insights for each of Alberta's 87 provincial constituencies and 34 federal ridings to support tourism operators and communities to enrich tourism industry discussions with Alberta's provincial and federal politicians.

Individual tourism operators, DMOs and other sector associations can draw upon these insights to help inform a common understanding about the power of Alberta's visitor economy.

Updated provincial and federal riding sheets were released using the most current data from Statistics Canada to providing a 2022 vs 2019 perspective.



## PRAIRIES ECONOMIC DEVELOPMENT CANADA:

On December 15, 2022, the late Honourable Jim Carr's vision for a sustainable future moved a step closer to fruition with the enactment of the Building a Green Prairie Economy Act. This law ostensibly marked a new direction in business practices, focusing federal efforts on boosting regional economic growth and creating sustainable, high-quality employment in the prairies. Its success requires a collaborative approach among federal departments, led by the minister responsible for prairie economic development.

TIAA provided feedback on this act to the Government of Canada and Prairies Canada. We highlighted the tourism sector's potential to stimulate economic growth in local communities while aligning with the nation's biodiversity and conservation goals.

Recognizing an ongoing missed opportunity in the Prairies Canada region, TIAA advocated for expansion through strategic investments in tourism infrastructure and human capital. This move is aimed at harnessing sustainable and regenerative tourism. TIAA emphasized the industry's role as a catalyst for economic advancement and advocated for a robust, federally supported tourism partnership to ensure the industry's ongoing growth and positive environmental contribution.



# ADVOCATING FOR INDUSTRY

## TOURISM ADVOCACY SUMMITS:

In 2023 TIAA executed 2 sold out Tourism Advocacy Summits. The TIAA Tourism Advocacy Summit is the industry's premier event to learn about current government priorities, to gain political and industry insights from experts and media observers, and for Alberta tourism leaders to share industry points-of-view with elected and non-elected representatives.

The annual Summit hosted at the JW Marriott in Edmonton February 26-29 saw almost 300 attendees engaged in thoughtful presentations and dialogue around growing the industry, a whole of government approach to tourism development, labour issues and of course the Provincial election. Attendees and speakers included Premier Danielle Smith, Minister Todd Loewen, Senator Karen Sorensen, Minister Randy Boissonnault as well as Marsha Walden (CEO Destination Canada and Beth Potter (CEO TIAC).

In late September TIAA hosted the Post-Election Advocacy Summit at the Calgary Telus Convention Centre. This was a key event for orienting the new UCP government towards the tourism industry in Alberta. It included a "Deep Dive into Post-Election Priorities" to align tourism strategies with government policies and expert panels discussing innovative topics like sustainable aviation fuel and AI in tourism. The summit also featured insights from Tourism and Sport Minister, Joseph Schow and Travel Alberta's Jon Mamela on the future of Alberta's tourism, emphasizing the development of the Ten Alberta Tourism Destination Zones. A significant focus was on advocating for sustainable tourism, highlighting its role in Alberta's economic growth post-election.

TOURISM ASSOCIATION // ALBERTA

**2024**  
TOURISM ADVOCACY SUMMIT  
February 4 - 6, 2024

JW Marriott Hotel, Ice District  
Edmonton, Alberta

**Why Attend?**

- Strategic Policy Panel Discussions Aimed at Growing Alberta's Visitor Economy
- High-Impact Breakout Sessions for Tourism Leaders
- Engagement Opportunities with Elected Officials
- Industry Networking

**EARLY BIRD REGISTRATION**  
Ends December 31, 2023

**REGISTER NOW**  
tiaalberta.ca

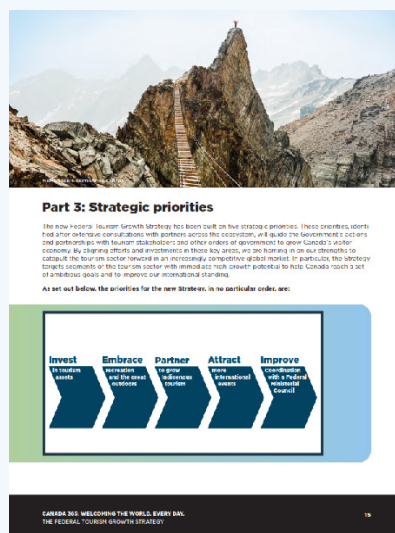
# ADVOCATING FOR INDUSTRY

## CANADA 365, THE FEDERAL TOURISM GROWTH STRATEGY:

TIAA was pleased to see the release of the new federal tourism strategy (Canada 365) which positions Tourism as a cornerstone of the Canadian economy. Of the five priorities identified, we are particularly encouraged by the focus on the investment in tourism assets; as well as the focus on recreation and outdoor, nature-based experiences, which are key to driving more regenerative and sustainable tourism activities.

While the strategy has broad acceptance from tourism leaders across the nation. TIAA has noted that without a commensurate federal investment to execute the strategy it will struggle to meet the goal of expanding Canada's visitor economy GDP contribution by 40% in 7 years and regain our top 10 ranking in

This was reinforced late in 2023 in the *Tourism Outlook: Unlocking Opportunities for the Sector* released by Destination Canada's which predicts tourism revenue exceeding \$109.5 billion in 2023, outpacing 2019 levels. Despite challenges related to inflation, the sector's expected 5.8% growth rate highlights its economic importance. Potential growth could reach \$160 billion by 2030, but without addressing capacity constraints, it will plateau at \$140 billion. Key strategies for growth include workforce development, off-peak season optimization, attracting high-value guests, and increasing air access and investment.



## TIAA'S SUBMISSION TO THE FEDERAL BUDGET:

In summer of 2023 TIAA provided budget feedback to Federal Government of Canada.

The recommendations focused on four foundational pillars critical to the recovery and sustainable growth of Alberta's visitor economy, including attracting and retaining a skilled workforce, developing and promoting tourism assets, improving access for visitors and building a regenerative and inclusive tourism industry.

## RED TAPE REDUCTION:

Eliminating regulations and administrative processes that impede business innovation and investment is a top priority in supporting Alberta's aims to grow the value of the visitor economy.

TIAA continued its prominent role in support of this agenda as board chair (Alisha Reynolds) and President and CEO (Darren Reeder) continued to co-chair the Tourism and Hospitality Red Tape Industry Panel with the aim of helping to shape the agenda and priorities to support the needs of operators within Alberta's visitor economy.

# ADVOCATING FOR INDUSTRY

## TIAA'S BUDGET 2023 RECOMMENDATIONS TO THE GOVERNMENT OF ALBERTA:

Building on the key findings from the comparative economic impact study, Alberta's Tourism Industry: Economic Impacts and Policy Recommendations to Spur Investment, TIAA has updated its message to the Government of Alberta:

- Provide a resourcing commitment to Travel Alberta that is commensurate with the industry's economic contribution, relative to other sectors of the economy.
- Implement an integrated policy and decision-making framework that supports tourism across government.
- Modernize land use legislation by implementing all six recommendations outlined in TIAA's report, The Economic Value of Outdoor Recreation on Alberta Crown Lands.
- Introduce a travel tax credit to stimulate spending by Albertans on Alberta-made travel products and services.
- Address labour shortages by investing additional funds to Travel Alberta to deliver a world-class, tourism awareness and careers development campaign aimed at promoting destination employment career paths.
- Develop a regional tourism infrastructure capacity planning framework that is aligned with Travel Alberta's regional destination development, Alberta's 2024-26 Capital Plan and Alberta's 20-Year Strategic Capital Plan.
- To achieve the government's goal of doubling the size of the visitor economy there needs to be a sustained and strategic commitment of government resources and staff.

## 2024 RISK REGISTER

### LABOUR & HOUSING SHORTAGES

As re-building Canada's tourism labour force is expected to take up to 10-years, if Alberta is to get anywhere near the government-articulated goal of a \$20B tourism industry, innovative policies, programs and incentives will be required to help build a sustainable talent pipeline for the future. The growing lack of affordable housing supply is an underlying threat to future tourism talent attraction and retention; it is no longer just a resort-destination narrative: it exists to varying degrees in every Alberta community that benefits from tourism. Growing pressures on private sector wages is also strong pause for consideration by all tourism operators with respect to total compensation, culture, mental health and work-life balance issues.

#### THREAT ASSESSMENT

EXTREMELY HIGH

### INFLATION, INTEREST RATES & PANDEMIC DEBT REPAYMENT

Persistently high interest rates, non-government commitment to extend timelines for COVID19-related debt repayment, and, seemingly limited benefits from government-driven efforts to cool inflation are all placing added pressure on cashflow and undermine the future viability of many tourism businesses. There is also evidence to suggest that some businesses, ineligible to receive COVID19 supports (eg. CEWS, CEBA) sit on the fringes of recovery and that the cumulative impacts for the tourism sector are neither known, nor have been modeled into the federal government aims to grow tourism GDP by 40% by 2030.

#### THREAT ASSESSMENT

HIGH

### EXTREME WEATHER: DISASTER MANAGEMENT PREPAREDNESS

Extreme weather events are increasing in frequency, and severity. Wildfire events, in particular, have wreaked havoc in the lives of residents and businesses who have been subjected to potential evacuation orders, actual evacuations, businesses losses, and, the knock-down reputational impacts that have, on many occasions, led the visiting public to believe that an entire regional jurisdiction should be avoided when, in reality, only a small portion of it may actually be experiencing a disaster management event. On a broader level, and as a point for future consideration, disaster management preparedness is something destinations need to start factoring into their annual business planning efforts.

#### THREAT ASSESSMENT

HIGH

### BUSINESS INPUT COSTS

Ongoing supply chain disruptions, geopolitical issues impacting energy and utility prices, and, relentless growth in insurance premiums are all squeezing business profit margins. The cumulative impact of these rising prices is putting pressure on discretionary spending: a reality that will have to be closely monitored by the tourism industry in 2024 as issues such as rate resistance, frequency and necessity of travel may all come closer under closer scrutiny.

#### THREAT ASSESSMENT

HIGH

# THE POTENTIAL OF ALBERTA'S RECREATION ECONOMY

TIAA remains committed to prioritizing the sustainable development of outdoor recreation on Alberta's Crown Lands. A distinct lack of recognition for outdoor recreation exists within Alberta's resource economy, contrasting with other sectors. Outdoor recreation, despite its substantial potential to contribute to the growth and diversification of Alberta's economy, has not been duly acknowledged or understood as a significant economic sector. The economic impact report, Alberta's Crown Land Outdoor Recreation Economy, commissioned by TIAA, remains the foundation for current advocacy efforts

TIAA supports a significant policy shift to align with the innovations seen in neighboring British Columbia. A starting point for this change could be the establishment of an Alberta-specific Office of Outdoor Recreation, which would greatly support the sector's development.

Throughout 2023, TIAA actively worked to increase awareness of the sector's potential and advocated for the implementation of the six recommended actions outlined in this report. These efforts involved engaging with various organizations within the province, including the Outdoor Recreation Council of Alberta, Association of Canadian Mountain Guides, Interpretive Guides Association, and Outdoor Council of Canada. Additionally, TIAA reached out to local recreationalist associations across Alberta to raise awareness of the report's contents and implications. The following recommendations are key to ensuring access and opportunity for Albertans:

1. A coordinated & unified outdoor voice
2. Supportive Crown land policy
3. Investment in new and renewal of existing
4. Inventorying of Crown land outdoor recreation resources
5. Measure & monitor the outdoor recreation economy
6. Office of outdoor recreation

## OUTDOOR RECREATION IMPACT: SNAPSHOT

**\$2.3B**  
SPENDING BY ALBERTANS ON  
TRIP-RELATED EXPENDITURES

**\$258**  
PER DAY TRIP

**\$757**  
PER OVERNIGHT TRIP

### OUTDOOR RECREATION IS A POWERFUL ECONOMIC DRIVER

<b>\$2.8B</b> GDP	<b>0.8%</b> OF ALBERTA GDP	<b>\$551M</b> TAX REVENUE	<b>1.5%</b> OF TOTAL ALBERTA EMPLOYMENT	<b>36,000</b> FULL-TIME EQUIVALENT JOBS
----------------------	-------------------------------	------------------------------	---	---

### ALBERTANS ARE PASSIONATE AND ACTIVE OUTDOOR ENTHUSIASTS

<b>3.46</b> AVERAGE NIGHTS PER OVERNIGHT VISIT	<b>33%</b> OF ALL OUTDOOR RECREATION TRIPS BY ALBERTANS OCCUR ON PUBLIC LANDS	<b>\$376M</b> IN EQUIPMENT AND ACCESSORY EXPENDITURES (EG. EQUIPMENT, APPAREL)	<b>\$10,282</b> AVERAGE ANNUAL HOUSEHOLD SPEND ON EQUIPMENT AND ACCESSORIES APPAREL
--	--	---	---

### DISTRIBUTION OF SPENDING BY TRIP-RELATED EXPENDITURE CATEGORY

<b>25.0%</b> Gasoline stations	<b>10.7%</b> Accommodation	<b>13.6%</b> Food & beverage stores	<b>17.0%</b> Equipment rentals	<b>12.9%</b> Restaurants, bars & cafes
<b>10.5%</b> Activity fees	<b>9.1%</b> Other retail	<b>1.2%</b> Guided tours	<b>0.1%</b> Car/truck rentals	

"Outdoor tourism can be a significant economic vehicle for Alberta.

Outdoor recreation is changing, and it is essential that stakeholders collaborate on an ongoing basis to achieve sustainable growth, meet each other's needs and conserve our natural resources for generations to come."

**FRANZ PLANGGER**  
EXECUTIVE DIRECTOR,  
OUTDOOR COUNCIL OF  
CANADA

# ECONOMIC IMPACT OF ALBERTA'S VISITOR ECONOMY

## ALBERTA'S TOURISM INDUSTRY: ECONOMIC IMPACTS AND POLICY RECOMMENDATIONS TO SPUR INVESTMENT

This past year, TIAA commissioned a landmark comparative economic study to better understand and to raise awareness of the economic contribution that Alberta's tourism industry has on the provincial economy, and the impacts that the COVID-19 pandemic has had on the livelihood of Albertans across the province.

The study highlights the value of tourism as an economic sector and provides:

- an analysis and evidence of the economic and employment impact of the industry in the province (before and during the COVID-19 pandemic) relative to other industries;
- an assessment of the Government of Alberta's policy approach and financial support for the sector in comparison to other sectors in the economy and relative to the approach taken in British Columbia; and,
- recommendations to strengthen industry investment and job creation to help achieve the government commitment to double tourism expenditures by 2035.

Based on this research TIAA has learned that on a comparative economic and employment basis, the tourism sector is substantially under-funded relative to other sectors in the economy and that doubling tourism expenditures in the province would more than triple the 2021 GDP contributions and jobs in the province.

Government Funding Relative to Jobs and GDP Contribution by Industry

Industry	2019 Jobs	2019 GDP (\$MMs)	2022-23 govt funding	Govt Funding per Job	Govt Funding per \$000s of GDP
Tourism	81,600	\$7,087,000	\$60,000,000	\$735	\$8.47
Energy	133,700	\$88,996,700	\$948,000,000	\$7,091	\$10.7
Agriculture & Forestry	52,300	\$12,528,800	\$453,000,000	\$8,662	\$36.2

## A CASE FOR GREATER INVESTMENT IN TOURISM

Government Support for Tourism is Understated on a Comparative Basis to other Economic Sectors

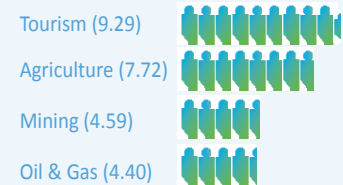
### Parity Funding Based on Jobs Contribution

For every job in the tourism industry, the government spends approximately \$735. Comparatively, the govt spends approx. \$7,100 per job in the energy sector, and \$8,661 per job in agriculture and forestry. At parity, this would translate into \$579 million of government spending for tourism compared to energy, and \$707 million compared to agriculture and forestry.

### Parity Funding Based on GDP Contribution

A similar argument could be made on a GDP basis, whereby govt spends \$8.5 per thousands of GDP on tourism, compared to \$10.7 for energy and \$36.2 for Agriculture and Forestry. At parity, government spending should be \$75 million on tourism when benchmarked to energy, and \$256 million when benchmarked to agriculture & forestry.

### Jobs Generated per \$1,000,000 of Output



### FACT

The average number of jobs created per million dollars of output in the tourism industry is 9.29, compared to 6.9 for the economy as a whole

# ECONOMIC IMPACT OF ALBERTA'S VISITOR ECONOMY

To realize this untapped potential, TIAA believes the Government of Alberta needs to implement an integrated policy and decision-making framework that supports tourism across government and immediately commit to funding tourism commensurate with the industry's economic contribution, relative to other sectors of the economy. The tourism industry is unique in that it involves a number of government ministries and agencies that would ideally coordinate to advance a strategy to grow the industry. The Government of Alberta can take a leadership role by creating the right policy supports necessary to achieve this potential.

The report speaks to a number of policy recommendations that include recommitting to doubling tourism expenditures by 2030; adopting a provincial tourism policy framework that articulates a vision for tourism development in Alberta; establishes a supportive crown

land policy framework that prioritizes tourism for growth; establishing crown land allocation principles to guide public servants in administering the framework; providing a concierge service for tourism project proponents to easily navigate process requirements to advance tourism projects; and inventories crown land tourism and recreation resources.

From a resourcing perspective, TIAA believes that the full equivalent of the Alberta Tourism Levy (benchmarked to 2019 and adjusted for annual inflation) should be allocated to Travel Alberta so that it may more effectively fulfill its destination marketing role for the sector. An additional \$60 million for the next five years should also be provided to Travel Alberta to catalyze private sector investment in tourism infrastructure and amenities geared towards achieving the goal of doubling tourism expenditures by 2035. Lastly, TIAA believes that departmental budgets that support the development of the tourism industry be earmarked to achieve the government's vision.



---

“As dedicated TIAA members, the opportunity to connect with fellow tourism operators and associations on a provincial level has been instrumental in Tourism Medicine Hat’s ongoing success.

Through TIAA, we feel our voice is not only heard, but our collective message achieves impactful results from the government. Recognizing tourism as a vital economic pillar is crucial for overall prosperity in our province, and TIAA serves as our ambassador, elevating our needs and propelling our industry forward.”

**JACE ANDERSON**  
**EXECUTIVE DIRECTOR**  
**TOURISM MEDICINE HAT**



Travel Alberta/ROAM Creative

## COMMUNICATIONS

In its ongoing commitment to strategic communication, TIAA has intensified efforts to engage effectively with the industry, members, and stakeholders throughout the year. This involves amplifying TIAA's research findings, government announcements, and the current state of the industry, as well as connecting consistently with shareholders and potential members. The following highlights provide a glimpse into some of our communications efforts:

- Creating an annual schedule of content that commemorates milestones and dates of importance to the tourism sector such as the National Day of Truth and Reconciliation, World Tourism Day, National Small Business Week, etc.
- Curating industry insights, policy and advocacy news, government announcements, updates and events through TIAA's industry newsletter multiple times per month.
- Using LinkedIn as the association's primary business connector to relay news, celebrate successes, gain industry feedback, and promote TIAA events.
- Growing the utility of TIAA's website with timely updates and enhanced widget integration that leverages tools to help reach a wider audience.

# INDUSTRY & STAKEHOLDER ENGAGEMENT

In 2023, TIAA experienced ongoing expansion, marked by sustained collaboration with industry partners on significant initiatives.

This continued partnership not only strengthened TIAA's connections within the industry but also contributed to community development across the province, further elevating our presence and impact.

## TIAA INDUSTRY ASSOCIATIONS ADVISORY COUNCIL:

In 2023, TIAA convened the Industry Associations Advisory Council twice. This group is comprised of 23 tourism-related representatives, including lodging, Indigenous tourism, ski, outfitting, meetings and conventions, museums and more.

The objective of the council is to inform an understanding of the policy, research and advocacy priorities of each of Alberta's various tourism-oriented trade associations.

These meetings facilitate opportunities for partner presentations on emerging issues, to receive policy and information updates from assistant deputy ministers, and to consider areas of joint advocacy to support the aims of Alberta's visitor economy.



Victoria Wakefield

## MEMBER TRAINING AND EDUCATION:

Continued professional development and training for Alberta's tourism sector is key to individual role satisfaction and industry growth. TIAA organized the Bill C-27 and Cyber Security Webinar, to help the sector understand the impact of the bill on email lists, record management, and more.

TIAA also assisted TIAC with their Town Hall in Alberta, procuring Todd Hirsch, The Modern Economist, for an illuminating session on best practices.

## TOURISM WEEK & TOWN HALLS:

In the January 2023, TIAA partnered with Travel Alberta and Indigenous Tourism Association to host six Town Halls across Alberta. Locations included Central Alberta (Sylvan Lake), Northern Rockies (Hinton), Edmonton and Region, Fort McMurray, Southern Rockies (Blairmore) and Calgary Region.

The events encouraged tourism operators and stakeholders to provide first-hand input on issues affecting the sector in their area.

TIAA provided resources based on our findings, accessible through the Travel Alberta website. Funding and support for business development, a better understanding of the Indigenous tourism ecosystem, year-round product development, were some of the most popular requests.

## DATA INSIGHTS & ANALYSIS:

In its second year of operation, the online data dashboards initiative by TIAA, in collaboration with Travel Alberta, continues to empower tourism operators by enhancing their decision-making capabilities. This is achieved through the provision of comprehensive online dashboards that present a broad spectrum of critical tourism insights. These dashboards offer up-to-date trends, economic impact data, visitor and market intelligence, and more, making them invaluable tools for tourism businesses, communities, and industry partners. These stakeholders can leverage this information to gain a deeper understanding of the tourism industry and uncover potential areas for growth.

TIAA is excited to observe an increasing trend among tourism organizations in adopting a data-informed approach to destination development and labor forecasting. This progressive shift is particularly evident in the successful applications by Destination Canada and Tourism HR Canada. Destination Canada has been notable for its insightful market highlights, which provide a nuanced understanding of various tourism markets. Simultaneously, Tourism HR Canada's employment trackers have been instrumental in providing real-time data on employment trends in the tourism sector.

The positive reception and application of these tools and insights across the industry underscore TIAA's ongoing commitment to fostering a more informed, agile, and responsive tourism sector. Through these initiatives, TIAA continues to play a pivotal role in shaping a data-driven future for tourism in the region.

# ON DECK FOR 2024

In 2023, Alberta's tourism spending recovered two years ahead of schedule, igniting renewed hope for operators across Alberta's tourism ecosystem. As we look toward 2024, here is some of what TIAA has planned to support Alberta's visitor economy.

## **TOURISM TOWN HALLS:**

In partnership with Travel Alberta and Indigenous Tourism Alberta, TIAA will be offering a series of Tourism Town Halls across the province April 2024.

## **INDUSTRY SENTIMENTS & CONDITIONS SURVEYS:**

TIAA will continue to execute two industry survey engagements in the year. The Annual Business Conditions survey and Summer Pulse survey help contextualize issues and how they evolve over industry's peak business season.

## **ALBERTA TOURISM ADVOCACY SUMMIT:**

Building on the success of the Pre- and Post-Election Alberta Tourism Advocacy Summits, TIAA is hosting an advocacy summit on February 4-6 at the JW Marriott Ice District, Edmonton. Industry leaders have the opportunity to network, learn from experts about the future of tourism, and have their say about challenges they're facing within the industry.

## **EXECUTING LABOUR STUDY RECOMMENDATIONS:**

TIAA is working to secure funding to put into effect the recommendations of the HR Tourism Canada / TIAA Labour Study released in 2023. Establishing a career-oriented labour pipeline will require a multi-year effort from government, PSE's, NGO's and industry.

## **STATE OF THE INDUSTRY REPORT:**

TIAA will present a forward-looking report at the Alberta Tourism Advocacy Summit that will help shape industry advocacy priorities for the year.

## **HOUSING AFFORDABILITY STUDY:**

This study aims to research and analyze housing affordability challenges for tourism industry workers in key urban and rural Alberta markets. The objective is to develop strategies to increase housing affordability.



## **ALBERTA TOURISM HILL DAY IN OTTAWA:**

To draw greater attention to Alberta's visitor economy, TIAA is planning this event in the fall to bolster Alberta's reputation in Ottawa and to advance key policy messages that are important to the province.

## **TRAVEL TAX CREDIT RESEARCH INITIATIVE:**

The objective of this project is to gain insights on policy instruments (eg. travel tax credit) that could be used to boost local tourism, fuel tourism zone development efforts, induce low-season demand, and, contribute to the overarching goal of growing the Alberta tourism industry into over \$20 billion sector. This initiative will be grounded in data-informed research and will consider best practices from other jurisdictions.

## **COMPARATIVE ECONOMIC IMPACT AND RECOMMENDATIONS:**

In 2024, TIAA will undertake a project to update the economic impact analysis of Alberta's tourism industry and compare it with government support for other sectors. This study will measure the tourism sector's GDP, tax contributions, and job creation, contrasting these with previous data sets to assess government policy shifts and corresponding industry growth. Additionally, it will examine government policies and financial support across various industries, incorporating forthcoming commitments like the 10-year tourism strategy. A key output will be an annual scorecard to track tourism's progress towards doubling expenditures by 2035. The project, set for completion by Q1 2024, will produce a comprehensive report, thereby providing valuable insights for advocacy and policy-making.



## TOURISM SPENDING: PACING AHEAD OF SCHEDULE

Alberta is well on its way to building the tourism economy of the future, having recovered (and grown) tourism spending by an additional \$600 million to over \$10.7 billion benchmarked to 2019 levels. Notably, this achievement occurred in 2022: 2-years ahead of schedule - and, it happened because there was a disciplined plan - that government invested in - to support the industry's recovery.



"The accelerated recovery of Alberta's visitor economy did not happen by accident, rather as a result of a disciplined, performance-driven plan to support tourism market investment and recovery. This helps to demonstrate that every dollar invested in tourism contributes to job creation and further diversification of the provincial economy."

**DARREN REEDER**  
**PRESIDENT & CEO**  
**TIAA**

### CONTACT

**Darren Reeder**  
**President and CEO**  
darren@tiaalberta.ca

**Kimberlee Maruyama, CPA**  
**Director, Finance & Operations**  
kimberlee@tiaalberta.ca

**Stavros Karlos**  
**Director, Research, Policy & Government Affairs**  
stavros@tiaalberta.ca

**Rachel Henry**  
**Manager, Communications & Stakeholder Engagement**  
rachel@tiaalberta.ca

**TIAA Administration Mailing Address**  
**Box 142, Calgary Stn Central**  
**Calgary, Alberta, T2P 2H6**  
tiaalberta.ca

