

2024 TIAA Year in Review



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Travel Alberta / Mike Seehagel

INTRODUCTION

MESSAGE FROM THE PRESIDENT & CEO

As we reflect on 2024, I am filled with pride and gratitude for the milestones achieved together in Alberta's tourism industry. This year has been one of resilience, innovation, and collaboration, and it has set a strong foundation for continued growth in 2025.

This year, we saw significant progress in advancing Alberta's visitor economy. From the release of the Government of Alberta's Tourism Growth Strategy with an ambitious goal of doubling our visitor economy to \$25 billion by 2035 passing of the all-seasons resort legislation to supporting our partners in Jasper as they recovered from devastating wildfires, TIAA has been steadfast in advocating for a tourism ecosystem that fosters growth and sustainability. Events like the Tourism Advocacy Summit brought industry leaders together, demonstrating the strength of our collective voice.

We've worked closely with partners, government officials, and stakeholders to ensure Alberta's tourism industry remains a priority for economic diversification and job creation. Thanks to your support, we've been able to focus our research and advocacy efforts on priorities like affordable workforce housing solutions, a travel experience tax credit, airline and airport competitiveness, digital sales tax reform, advancing comparative provincial investment levels in Alberta's tourism industry, and input into Alberta's Plan for Parks and Nature Strategy. These initiatives, alongside emerging regional drivers like music tourism, new investments in visitor supporting infrastructure and community-building legislation, all pave the way for long-term growth and resilience in Alberta's visitor economy.

In 2025, we remain committed to working with our members to address the challenges and seize the opportunities that lie ahead. Whether it's strengthening our advocacy efforts, expanding tourism offerings, or building on the successes of the past year, TIAA will continue to champion a vibrant and resilient visitor economy for Alberta.

To our members and partners, thank you for your trust and collaboration. Your unwavering commitment to the industry emboldens our work and ensures we remain a strong voice for Alberta's tourism sector.

If you're not yet a TIAA member, I would welcome the opportunity to connect with you and share how we can work together to build an even brighter future for tourism in Alberta.

Here's to continued success and new opportunities in the year ahead.

Darren Reeder
President & CEO
Tourism Industry Association of Alberta (TIAA)

TOWARDS GROWTH

Over the past year, TIAA has worked to strengthen Alberta’s visitor economy and advance the Government of Alberta’s goal of \$25 billion in visitor spending by 2035. Through advocacy and collaboration, we’ve championed initiatives that foster resilience, innovation, and long-term industry success.

In 2024, the Tourism Industry Association of Alberta (TIAA) made significant strides in shaping policies that unlock Alberta’s tourism potential and drive sustainable industry growth. The release of Alberta’s Tourism Sector Strategy – Higher Ground set the stage for an ambitious expansion of the visitor economy, while the passage of the All-Season Resorts Act marked a legislative milestone that will attract billions in private investment and bolster year-round tourism development. TIAA also played a strong advocacy role to ensure tourism considerations and approval pathways are articulated in Alberta’s Regional Plans and Crown Land Recreation and Nature Strategies, ensuring a balanced approach to economic growth and environmental stewardship.

With international tourism expenditures in Alberta outpacing other provinces and a full recovery of visitor spending well beyond pre-pandemic levels, the momentum is strong. Future growth will hinge on enhancing existing experiences, growing access, fostering innovation, and solidifying Alberta’s reputation as a world-class tourism destination. Through these policy advancements, TIAA has positioned Alberta to enhance its tourism infrastructure, support local businesses, and create sustainable economic opportunities across the province.

ALBERTA TOURISM ECONOMY PERFORMANCE HIGHLIGHTS

- ALBERTA AVERAGE DAILY RATE (2024) \$95.14 , 8.0% INCREASE FROM 2023
- \$12.7 BILLION IN VISITOR RECEIPTS
- 37.7 MILLION VISITORS TO ALBERTA (2023)

INTERNATIONAL VISITOR SPENDING

- \$2.9 BILLION (2023) INCREASED 25% OVER 2019
- \$1.7 BILLION IN TAXES GENERATED BY ALBERTA TOURISM BUSINESSES IN 2023 FOR LOCAL, PROVINCIAL & FEDERAL GOVERNMENTS

WHO IS THE TOURISM INDUSTRY ASSOCIATION OF ALBERTA?

Founded in 2019 the Tourism Industry Association of Alberta (TIAA) is the industry advocacy organization dedicated to supporting and strengthening Alberta’s tourism sector. TIAA represents tourism businesses and stakeholders across the province, engaging with government and industry partners to advance policies that foster tourism growth, investment, and competitiveness.

Mission

To unleash the potential of Alberta’s tourism economy.

Vision

Alberta’s tourism industry will be the driving force of sustainable, community economic development.

Mandate

- Advocate policy that supports the growth and sustainability of all facets of Alberta’s tourism economy;
- Through industry leadership and/or private-public sector partnerships, drive innovation, investment, product development and new visitor experiences;
- Work collaboratively with the Government of Alberta, Government of Canada and Travel Alberta to support the audacious target of more than doubling the size of Alberta’s tourism economy by 2035.

Industry of Industries

In Alberta, the visitor economy is literally “everyone’s business”. Growing faster than the general economy and driving new investment, the visitor economy is one of Alberta’s most significant economic engines and the backbone of many local and regional economies. As Alberta’s number one service export industry, the visitor economy brings new spending into the province and generates significant local employment, drives economic growth and diversification, generates important tax revenues, stimulates investment in community infrastructure and services, elevates the quality of life for local residents, and, deepens the appreciation and celebration of Alberta’s unique cultures and the natural environment.

Investment

TIAA supports a whole-of-government approach to the development of the province’s tourism industry, beginning with the efforts to quantify the cumulative impact of taxes, fees and regulations on private sector efforts to develop new tourism products, and jobs. Issues to be explored by the association include, but are not limited to: labour supply, access to capital, state of public infrastructure assets, current tourism industry data and metrics, and, predictable and sustainable funding to promote Alberta’s tourism industry.

Access

The UNWTO recently reported international tourism arrivals have fully recovered. Yet, Canada continues to struggle to grow its share of the market and find its way back onto the UNWTO's top ten list of countries that lead the world in tourism arrivals. DC targets, TA targets To achieve this objective will require a coordinated provincial-federal response on key policy issues such as increased air access, air capacity and air competitiveness, visas (processing times, improved administrative processes), and, structured labour and talent pipelines supporting the professional skills required to capitalize on the tourism economy of the 21 century.

Product

Alberta has unprecedented potential to grow the number of businesses that deliver unique and memorable visitor experiences, while also significantly contributing to the economic and employment base of their communities. By leveraging Alberta's tourism industry leadership, world-class assets and investment know-how, the province is well-positioned to construct new, value-added tourism products and experiences within established regional economic corridors and tourism destination zones to help expand the industry's contributions to the provincial economy.

A Whole of Government Approach to Tourism

TIAA supports a whole of government approach to tourism wherein the policies and regulations of all affected ministries align with the economic growth objectives for the tourism industry. TIAA's policy and advocacy efforts relate primarily to the following ministries:

- Ministry of Tourism and Sport
- Ministry of Forestry and Parks
- Ministry of Jobs, Economy, and Trade
- Ministry of Environment and Protected Areas
- Ministry of Municipal Affairs
- Ministry of Transportation and Economic Corridors
- Ministry of Affordability and Utilities
- Ministry of Treasury Board and Finance
- Ministry of Indigenous Relations
- Ministry of Public Safety and Emergency Services
- Ministry of Advanced Education
- Ministry of Agriculture and Irrigation
- Ministry of Culture and Status of Women
- Ministry of Service Alberta and Red Tape Reduction



POLICY AND ADVOCACY

ANNUAL PUBLICATIONS AND RESEARCH

TIAA's annual publications and research serve as the foundation for informed advocacy, strategic decision-making, and industry growth. Reports such as the annual State of the Industry Report and the Comparative Economic Study provide critical data on economic trends, visitor spending, and Alberta's competitiveness within the national and global tourism landscape. These insights support evidence-based policy recommendations, backed by data, ensuring tourism remains a key pillar of Alberta's economic strategy.

Beyond measuring industry performance, TIAA's research identifies emerging opportunities and policy priorities. In 2024, this approach led to the development of the Alberta Tourism Experience Tax Credit (ATEC) proposal to incentivize domestic travel, as well as the Alberta Tourism Workforce Housing Strategy, addressing workforce retention challenges. These insights help drive targeted conversations, inspiration and policy advancements. By identifying emerging opportunities and challenges, TIAA ensures that Alberta's visitor economy remains competitive, resilient, and positioned for long-term growth.

Dedication of the Alberta Tourism Levy Equivalency

TIAA continues to reinforce the importance of dedicating the Alberta Tourism Levy to its original purpose - funding tourism development and growth. By engaging policymakers and presenting evidence-based recommendations, TIAA highlighted how a reinvested levy can directly support infrastructure, destination development, and marketing efforts that strengthen Alberta's tourism sector.

Ensuring transparency and a predictable funding model remains critical to enhancing Alberta's competitive edge. TIAA's advocacy efforts emphasized that a dedicated Tourism Levy is a catalyst for sustainable industry growth, empowering communities and businesses to deliver exceptional visitor experiences across the province. TIAA continues to refine provincial tourism investment relative to other major economic sectors in Alberta and is published annually in the Comparative Economic Analysis completed by Verum Consulting and TIAA.

2024 State of the Industry: From Recovery to Resilience

The 2024 State of the Industry Report highlighted a tourism sector that proved its ability to thrive in 2023, surpassing pre-pandemic levels with total visitor expenditures reaching \$10.7 billion—a 5.9% increase over 2019. Domestic tourism drove this recovery, with Albertans spending 18% more than in 2019. International visitor spending, however, lagged 33% below pre-pandemic levels, but signs of revival emerged as U.S. travel led a resurgence, and July 2023 marked the first time international visits exceeded 2019 figures.

Despite these gains, challenges shaped the year. Labour shortages were a critical issue for 65% of businesses, while 53% reported difficulties offering competitive wages. Alberta’s \$1.2 billion tourism expenditure deficit to British Columbia underscored the need for stronger strategies to retain travelers.

Alberta’s recovery outpaced national trends—6% growth versus Canada’s 22% deficit in 2022. With calls for a long-term provincial tourism strategy, greater investments in workforce solutions, and enhanced funding for Travel Alberta including the dedication of the Alberta Tourism Levy, it’s clear that

achieving the province’s \$25 billion GDP target by 2035 is not just ambitious, it’s within reach.

Tourism Industry Association of Alberta Year in Review 2024

Alberta’s tourism industry continued its journey of recovery in 2023, overcoming significant pandemic-related setbacks. While domestic visitor expenditures exceeded pre-pandemic levels, international visitation remains a work in progress. The year was marked by cautious optimism but tempered by economic challenges, including inflation, labour shortages, and limited air access. Notable successes include a record breaking 10.7 billion in reported visitor expenditures which is a 6% growth in expenditures compared to 2019, outperforming other provinces like BC. Moving forward, the sector faces the dual task of sustaining recovery momentum and addressing systemic issues.

Comparative Economic Study 2024

In 2024, TIAA shone a bright spotlight on the critical role tourism plays in Alberta’s economy and the untapped opportunities that could transform the sector into a \$25 billion powerhouse by 2035. Through fresh insights and analysis, we laid out the challenges, potential, and actionable steps needed to make Alberta a leader in global tourism.

While recovery has been strong, with significant year-over-year gains, Alberta’s competitiveness continues to face headwinds, including a \$1.5 billion annual expenditure deficit to British Columbia and fragmented support for destination development.

FACT:
Alberta has a \$1.5 billion annual travel deficit with BC

Alberta Tourism’s Competitive Advantage

One of the most significant findings of the report is tourism’s ability to generate employment at a much higher rate in economic output than capital-intensive industries:

Tourism: 13.5 jobs per \$1 million

Agriculture: 7.2 jobs per \$1 million

Technology: 4.8 jobs per \$1 million

Film & Television: 3.9 jobs per \$1 million

Energy: 1.7 jobs per \$1 million

This means that every dollar invested in tourism generates nearly 8x more jobs than the energy sector, positioning it as one of Alberta’s most effective tools for job creation and economic diversification.

Laying the Groundwork for Growth

Economic impact: Doubling visitor spending by 2035 could drive \$17.9 billion in GDP, create 195,000 jobs, and generate \$2.39 billion in tax revenues annually.

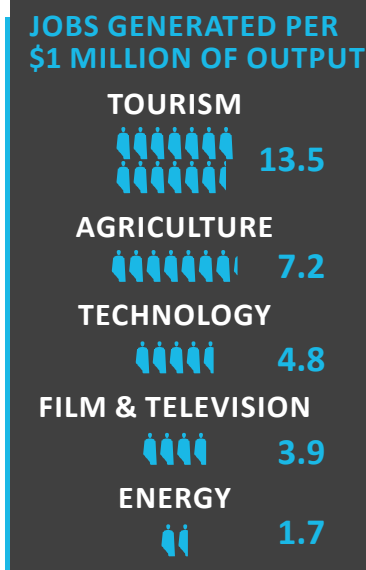
Labour solutions: Housing, immigration pathways, and workforce retention must be central to industry and government strategies.

Regional opportunities: Rural and underserved areas can lead the way in diversifying Alberta’s economy through year-round tourism.

Policy Recommendations & Next Steps

To close Alberta’s competitiveness gap and fully unlock the potential of the visitor economy, the study calls for:

- Full allocation of the Alberta Tourism Levy to Travel Alberta, ensuring sustainable funding for industry growth.
- An additional \$60 million in catalytic funding to support private-sector investment in new tourism infrastructure and products.
- Strategic policy alignment across provincial and federal governments to streamline investment attraction, land-use planning, and workforce development.
- A renewed focus on workforce housing, immigration pathways, and talent retention to address labor shortages and strengthen Alberta’s tourism workforce.
- With continued strategic investment and accessible policy frameworks, Alberta’s tourism industry has the potential to double in size, contributing \$17.9 billion in GDP, and generating \$2.39 billion in annual tax revenue by 2035.



Customized Federal and Provincial Tourism Performance Sheets 2022 vs 2023 (87 Provincial Constituencies, 34 Federal Ridings)

Using the latest Statistics Canada insights, TIAA refreshed the data insights for each of Alberta's 86 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.

Annual Tourism Business Conditions TIAA-Leger Survey

2024 TIAA-Leger Business Conditions Industry revealed a cautious optimism among Alberta's tourism operators. Two-thirds of businesses (65%) expressed positivity about the year ahead, a notable 5-point increase from October 2023. Encouragingly, 33% of operators reported that their business performance had

returned to or exceeded pre-pandemic levels, a testament to the sector's resilience.

However, the challenges of 2023 were sobering. Inflationary pressures topped the list, with 71% of businesses reporting impacts from rising fuel, labour, and food costs. Persistent labour shortages remained a roadblock, with 23% of businesses struggling to fill critical roles like cleaners and cooks. Despite these hurdles, 40% of businesses exceeded performance expectations, and 41% avoided taking on additional debt, signaling recovery stability.

SIGNATURE TIAA POLICY RESEARCH 2024

TIAA conducts annual research and policy recommendations based on current and evolving market conditions and risk assessments. These pieces of research are intended to educate, advance solutions and recommendations and support forward looking solutions in partnership to generate value for all Albertans.

THE ALBERTA TOURISM EXPERIENCE TAX CREDIT (ATETC): INCENTIVIZING ALBERTANS TO ACCELERATE THE GROWTH OF THE PROVINCIAL TOURISM ECONOMY

In June TIAA released a proposed Alberta Tourism Experience Tax Credit to incentivize Albertans to explore the province. The Alberta targeted tax credit would encourage off-peak travel (October–May) and increase in-province spending, reducing economic leakage to other regions like BC. Designed as a three-year pilot program, the credit aims to generate up to \$1.3 billion in incremental spending while supporting local businesses, and seasonal revenue stability while incentivizing Albertans to meet their neighbours throughout the province. By fostering increased visitation and expenditures, the initiative would play a transformational role in achieving Alberta's \$25 billion tourism target by 2035.

BUILDING ALBERTA'S TOURISM LABOUR PIPELINE

Advancing new approaches to addressing Alberta's persistent tourism labour challenges through research, collaboration, and advocacy. Building on the Labour Market Study of Alberta's Tourism Sector, TIAA advanced talent pipeline management strategies to address workforce shortages, promote tourism careers, and improve workforce housing options. These efforts reflect TIAA's commitment to supporting a sustainable and resilient workforce, ensuring Alberta's tourism industry remains competitive, adaptable, and ready to meet new labour realities.

Aligning Purpose Profit and Sustainability in Compensation Culture - SKIFT ADVISORY+TIAA

With successful grant funding under the Workforce Solutions Program TIAA proceeded in moving forward with Aligning Purpose Profit and Sustainability in Compensation Culture Project. This groundbreaking research and training project will provide insights on aligning Alberta's labour strategies with global best practices, with tactics for operators improve employee retention and satisfaction while driving the economic results their businesses are looking for. There are multiple phases including Alberta employer and employee direct engagement throughout the year. Project completion date is scheduled for 2026, with interim releases published throughout the year. In March of 2024 Skift Advisory in collaboration with Alphabet were the chosen organizations to deliver this exciting project.

The Province of Alberta is working in partnership with the Government of Canada to provide employment support programs and services.



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.

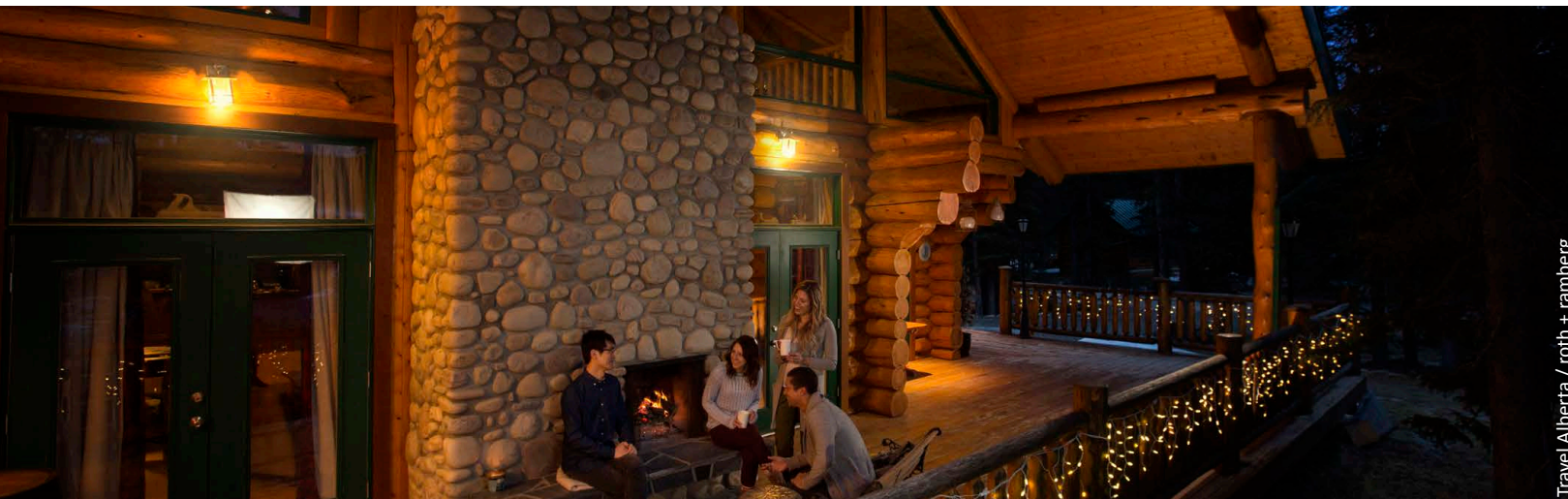
Immigration

As the federal government's approach to immigration system continues to reactively evolve, key developments such as the introduction of the AAIP Dedicated Tourism and Hospitality Stream were overshadowed by the federal government's reduction in overall immigration targets. TIAA remains steadfast in its support for immigration pathways and programs critical to the tourism industry, including the Temporary Foreign Worker (TFW) Program, provincial nomination allocations, and post-secondary work permits, with paths to residency.

These areas remain significant concerns for Alberta's tourism sector, which relies on attracting and retaining skilled international workers. TIAA emphasizes the ongoing need for tailored policy solutions to address demographic-driven workforce shortages, streamline immigration processes, and ensure the sustainability of Alberta's visitor economy. This includes ongoing advocacy for practical reforms that align federal programs with the unique needs of Alberta's tourism workforce. In August, CEO Darren Reeder released a whitepaper in defense of industry and calling for reform. Time to Shift Ottawa's Politicization of the TFW Program to Thoughtfully Addressing Canada's Structural Immigration Challenges was released in June.

An Alberta Tourism Workforce Housing Strategy: Towards Long-Term Labour Force Planning for a Growing Industry

In September 2024, TIAA released the Alberta Tourism Industry Workforce Housing Strategy, addressing the urgent need for affordable housing solutions for tourism workers across the province. The strategy offers practical solutions, such as partnerships to boost housing supply, tax incentives for employer-provided accommodations, and zoning reforms to streamline development. It also provides valuable policy prescriptions and lessons from communities across Alberta, making it a critical resource for planners and municipalities seeking to address housing challenges. With a focus on supporting tourism-dependent areas and new municipalities entering the visitor economy—the strategy underscores the vital role of housing in workforce retention and the long-term growth of Alberta's visitor economy.



Travel Alberta / roth + ramberg

PUBLIC POLICY SUBMISSIONS AND ISSUES ADVOCACY

Air Passenger Protection Regulations Submission

Recipients: Federal policymakers
Date: January 5, 2024

Emergency Management Planning for Tourism

Recipients: Ministers Joseph Schow, Rebecca Schulz, Todd Loewen, and Ric McIver
Date: February 8, 2024

Letter to Hon. Marc Miller on Temporary Foreign Worker Program

Recipients: Minister Marc Miller, CC: Minister Randy Boissonnault
Date: February 19, 2024

Alberta Tourism Experience Tax Credit Proposal

Recipients: Minister Joseph Schow, CC: Ministers Tanya Fir and Todd Loewen
Date: May 1, 2024

Cellular Service Advocacy on Icefields Parkway

Recipients: Parks Canada Executive Director Melanie Kwong, CC: Alan Fehr, Francois Masse,
Date: June 17, 2024

Feedback on Competition Bureau's Market Study on Airline Competition

Recipients: Commissioner Matthew Boswell
Date: June 17, 2024

AAIP Dedicated Tourism and Hospitality Stream Submission

Recipients: Minister Muhammad Yaseen
Date: July 11, 2024

Jasper Wildfire Submission – Environment & Climate Change Canada

Recipients: Minister Steven Guilbeault, Parks Canada CEO Ron Hallman
Date: July 31, 2024

Jasper Wildfire Submission – Parks Canada

Date: July 30, 2024

Alberta Plan For Parks Engagement Survey

Recipients: Minister Todd Loewen
Ministers Joseph Schow and
Date: Aug 24 2024

TIAA Competition Bureau Submission on the Competitiveness of Canada's Aviation Industry

Recipients: Commissioner Matthew Boswell
Date: August 31, 2024

Letter on Potential Airline Pilots Strike at Air Canada

Recipients: Prime Minister Justin Trudeau, Ministers Steven MacKinnon, Pablo Rodriguez, and Soraya Martinez Ferrada
Date: September 11, 2024

Time to Shift Ottawa's Politicization of the TFW Program to Thoughtfully Addressing Canada's Structural Immigration Challenges

Darren Reeder, President & CEO, TIAA Whitepaper

Submission for Alberta's Nature Strategy

Recipients: Minister Rebecca Schulz, CC: Ministers Joseph Schow and Todd Loewen
Date: November 15, 2024

Supporting the Tourism Workforce of Tomorrow

Recipients: Ministers Joseph Schow and Matt Jones
Date: November 7, 2024

DMF Consumer Protection Submission

Recipients: Minister Joseph Schow
Date: December 20, 2024

Pre-Budget Submission to Alberta Government

Recipients: Minister Nate Horner, CC: Alberta Cabinet Ministers
Date: January 12, 2025



ENGAGEMENT AND EVENTS

THE POWER OF TIAA'S EVENTS

Events are at the heart of our strategy, designed to drive policy changes and elevate the tourism sector. Each event we host serves as a platform for networking, education, and advocacy with specific industry and political objectives.

ALBERTA TOURISM ADVOCACY SUMMIT

The 2024 Tourism Advocacy Summit, held at the JW Marriott Edmonton Ice District, in its 4th year brought together nearly 300 industry leaders, policymakers, and stakeholders to discuss the future of Alberta's tourism sector. With pressing issues such as workforce shortages, housing affordability, sustainability, and public lands access on the agenda, the summit served as a platform for strategic discussions and policy alignment.

The event opened with a "Made in Alberta" reception, featuring remarks from Edmonton Mayor Amarjeet Sohi and Minister of Tourism and Sport Joseph Schow, signaling a focus on collaboration between industry and government. Sessions addressed predictive analytics in tourism (Greg Klassen, Twenty31 Consulting), resilience in the sector (Olympian Chandra Crawford), sustainability practices (Angela Nagy, GreenStep), artificial intelligence (Christopher Penn), Alberta Parks and many more topics.

Indigenous tourism was a recurring theme, with Shae Bird (Indigenous Tourism Alberta) and Brenda Holder (Mahikan Trails) discussing ways to advance economic reconciliation and long-term industry partnerships. The release of Alberta's Provincial Tourism Growth Strategy: Higher Ground by Minister Schow was a focal point, setting an ambitious target to more than double the visitor economy by 2035 through five strategic pillars.

With Alberta's tourism economy positioned for expansion, the 2024 summit underscored the need for continued industry-government collaboration, long-term workforce strategies, and policy adjustments to support sustainable growth.

94%
of attendees
derived tangible
benefits from
the Advocacy
Summit in 2024.

ALBERTA TOURISM TOWN HALLS

Regenerative Tourism Starts Here

The Alberta Tourism Town Halls serve as essential annual platforms for fostering local tourism development by promoting growth and generating solutions at the local level. These gatherings emphasize harmonizing social, environmental, and economic objectives in destination planning. By bringing together stakeholders, elected officials, community members, and industry players, the Town Halls facilitate the discussions, collaboration and local leadership required to achieve the target for a \$25 billion visitor economy by 2035.

Annually, up to six regional Town Halls are scheduled around National Tourism Week (April) in all regions of the province. Each Town Hall features expert panels who provide relevant insights into Alberta's travel and tourism industry, local tourism situation analysis, and opportunities for all participants to engage in meaningful dialogue and provide feedback to TIAA, Indigenous Tourism Alberta, and Travel Alberta.

In 2024, the Town Hall Series expanded to include local involvement from Destination Marketing Organizations (DMOs) and destination stakeholders, including local elected officials and operators, to workshop one to two specific economic opportunities that have the potential to significantly advance the growth of tourism in the community and surrounding region.

This past years speakers included:

- Darren Reeder, CEO, Tourism Industry Association of Alberta
- Mayor Jim Wood, Red Deer County
- Mayor Jim Wood of Red Deer
- Mayor Amarjeet Sohi City of Edmonton
- Kate Thompson, CEO, Calgary Municipal Land Corporation
- Shae Bird, CEO & President, Indigenous Tourism Alberta
- Mayor Ken Johnston, City of Red Deer
- Carrie Armstrong, Director Industry Development Indigenous Tourism Alberta
- David Goldstein, CEO & President Travel Alberta
- Malcolm Bruce, CEO, Edmonton Global
- Alex Sarian, CEO, Arts Commons
- Megan Dart, Executive Director, Edmonton Fringe Festival
- Quinton Crow Shoe, Head Smashed in Buffalo Jump

2024 TOWN HALLS
Edmonton, Calgary,
Red Deer, Lethbridge,
and Fort McMurray
700+ local businesses,
DMOs, governments
& NGOs

Michael Matt @michaelmatti

OTTAWA HILL DAY 2024

Advancing Alberta’s Tourism Priorities at the Federal Level

TIAA Hill Day 2024

- 36 Hours
- 16 Meetings
- 3 Ministers
- 15 MPs
- 8 Deputy Ministers, ADMs & Crown Executives
- 1 Reception with 85 attendees

Now in its second year, Ottawa Hill Day has become a cornerstone of TIAA’s federal advocacy strategy. This year’s event brought 35 Alberta delegates to the nation’s capital, showcasing the province’s western hospitality, leadership, and entrepreneurial spirit. With 16 high-impact meetings held over 36 hours, delegates engaged with federal ministers, MPs, and senior officials to advance Alberta’s tourism priorities.

Key policy areas included workforce development, wildfire recovery, air access policy, and immigration pathways, all tied directly to TIAA’s federal budget requests for 2025. TIAA’s exceptional coordination, detailed preparation, and well-crafted key messages ensured maximum utility of this outreach. The Alberta Hill Day Reception,

attended by 85 policymakers, further solidified relationships and demonstrated Alberta’s commitment to national economic and tourism leadership.

The event underscores TIAA’s ability to organize high-level advocacy efforts that reflect the province’s values while delivering measurable outcomes. With its combination of strategic focus and authentic engagement, Ottawa Hill Day has quickly established itself as a vital tool for ensuring Alberta’s voice is heard at the federal level.

Federal Departments Engaged:

- Prairies Economic Development Canada
- Transport Canada
- Employment and Social Development Canada (ESDC)
- Environment and Climate Change Canada (ECCC)
- Immigration, Refugees, and Citizenship Canada (IRCC)
- Innovation, Science, and Economic Development Canada (ISED)
- Parks Canada
- Atlantic Canada Opportunities Agency (ACOA)/Rural Economic Development

Ministers:

- Randy Boissonnault (Employment, Workforce Development, Jasper Recovery Lead)
- Gudie Hutchings (Rural Economic Development, ACOA)
- Soraya Martinez Ferrada (Tourism, Regional Economic Development)

Reception Attendance:

- 85 attendees including Senators, MPs, and senior political staff

Ottawa Hill Day Key Messages

THEME 1: COMPETITIVENESS

- Enshrining Access to Multimodal Travel as a Fundamental Charter Right
- Improving the Competitiveness of Canada’s Airlines & Airports
- Extending eTA to More Eligible Countries

THEME 2: GROWTH & SUSTAINABILITY

- Implementation of the Federal Tourism Strategy
- Access to Capital to Drive Diversification
- Sustainable Tourism Within Canada’s National Park System
- Indigenous Tourism Product Development
- Federal Investment in the Future of Alberta’s Visitor Economy

THEME 3: RESILIENCE

- Tourism Workforce Development
- Canadian Wildfire Preparedness & Response Strategy
- Tourism Impact from Reduction in International Student Permits
- Affordable Housing Strategies to Support Tourism
- Immigration Pathways for temporary foreign workers and international students

STANDING UP FOR CANADIAN MOBILITY RIGHTS

TIAA has been steadfast in standing up for Canadian mobility rights (Section 6, Charter of Rights and Freedoms) to ensure affordable, accessible, and reliable transportation infrastructure across the country. During Ottawa Hill Day, TIAA emphasized the critical need for multi-modal transportation access and provided input to the Competition Bureau’s study on competitiveness in Canada’s airline industry and feedback on the proposed amendments to the Air Passenger Protection Regulations. TIAA will continue to support our aviation and airport partners reinforcing the need for policy solutions that support connectivity, economic growth, and tourism competitiveness, including for rural and remote regions. TIAA also consistently engaged with partners and Ministries seeking fair and fast resolution of labour disputes including those affecting CN Rail, WestJet and Air Canada, highlighting the significant impacts of service disruptions on tourism operators and Canadians.

TOURISM BUDGET FORUM AND PREMIER’S DINNER

On November 19, TIAA hosted its inaugural Tourism Economic Budget Forum and Premier’s Dinner with our incredible hosts at the Edmonton Convention Centre. The event brought together tourism leaders and government MLA’s, to align tourism policy and funding priorities with Alberta’s ambitious goal of \$25 billion in visitor spending by 2035.

The afternoon started with a political panel to set the stage for the year ahead and followed with comments from the Leader of the NDP, Naheed Nenshi. Prior to dinner we heard from Mayor Richard Ireland, Melanie Kwong, Parks Canada on pace of recovery and lessons learned to date from the Jasper wildfire.

At an incredible Alberta sourced dinner Premier Danielle Smith commended TIAA’s leadership in uniting the sector and advancing the government’s tourism vision. For the first time in recent memory an Albertan Premier has called out the vital importance of the Alberta tourism sector to our social, health and economic wellness.

To deepen understanding of tourism’s localized economic contributions, detailed ‘Tourism Impacts by Provincial Riding’ sheets were shared with MLAs, emphasizing tourism’s role as a vital economic driver across Alberta.

Premier’s Dinner by the numbers

- Premier’s Dinner by the Numbers
- 260 Tourism Leaders
- 24 Government MLAs
- 11 Ministers
- 2 Donut Walls
- 1 Premier



MEDIA ACTIVITIES

In 2024, TIAA enhanced its communications strategy to engage members, stakeholders, and the industry while amplifying advocacy efforts and key updates. Alberta Tourism Insights Newsletter, LinkedIN and the TIAA website remain our primary communication channels. All channels saw continued steady growth and engagement throughout 2024.

Interviews and Features

- *CBC Homestretch*: Discussed wildfire recovery efforts
- *Calgary Herald*: Op-ed on Indigenous tourism and all-season resorts by Darren Reeder
- *CTV News*: Highlighted advocacy for resort approvals under the All-Season Resorts Act
- *Jasper Fitzhugh*: Coverage of wildfire recovery impacts
- *Edmonton Journal*: Jasper reporting
- *The Albertan News*: Focused on workforce housing solutions
- *National Post*: Featured insights on airline competition
- *630CHED Radio*: Discussed Alberta’s tourism strategy
- *RMOutlook*: All Season Resorts
- *Global News*: TIAA wildfire recovery advocacy

LinkedIN follower growth
 +1576 followers
 45.9% annual growth



2024 TIMELINE

Alberta's tourism industry experienced tremendous growth in 2023, reaching \$12.7 billion in visitor spending, a nearly 20% increase over the previous year. International visitor spending surged to \$2.9 billion, surpassing pre-pandemic levels and reaffirmed Alberta's position as a global destination of choice.

This success reflects the impact of strategic investments and a performance-driven approach, which is just starting to pay dividends through job creation, economic diversification, and international competitiveness. Alberta has emerged as the strongest performing province post-pandemic, leading the country in recovery and the only visitor economy that has seen strong growth since 2019. But risks remain and new investment must be realized to continue growing. Alberta faces challenges as \$2 billion in annual tourism spending continued to flow by Albertans to British Columbia—a new record that underscores the growing demand for high-quality recreation, cultural, and outdoor experiences that are just not available at home.

JANUARY

- TIAA 2024 Pre-Budget Submission to the Government of Alberta
- Coming off a strong 2023 optimism dropped relative to earlier in the year with only 60% of Alberta operators optimistic for the year ahead coming into the year
- CEBA Loan Repayment Deadline

FEBRUARY

- TIAA event 4th Annual Tourism Advocacy Summit 2024
- Critical Policy Advancement: Higher Ground: A Tourism Sector Strategy
 - On February 14, Premier Danielle Smith, Minister Joseph Schow and Parliamentary Secretary Martin Long released the long-awaited *Provincial Tourism Growth Strategy: Reaching Higher Ground*. This strategy has been years, and some would say decades, in the making. Release of the Long-Term Provincial Tourism Growth Strategy Raising the profile of the Alberta tourism industry at the provincial level

has been a key advocacy piece for operators and TIAA. The work in raising this profile has been entrenched in the ambitious Provincial Tourism Growth Strategy, released by Premier Smith, and Minister Schow on February 14th, highlighting the importance of the industry to Alberta's economy and committing to its sustainable growth.

"The accelerated recovery of Alberta's visitor economy did not happen by accident; it resulted from a disciplined, performance-driven plan to support tourism market investment and recovery. This progress demonstrates that every dollar invested in tourism contributes to job creation and further diversification of the provincial economy."

– Darren Reeder, President & CEO, TIAA

MARCH

- Budget 2024 passes while industry's key policy ask (full dedication of the ATL or it's equivalent) was not in budget 2024 we note Travel Alberta's budget remains strong and new announcements from the Ministry included \$2.5 million is allocated to support major sport events, such as national and international championships
- Canada reimposed visa restrictions for Mexican citizens in effect. Provincial and federal advocacy on Visa requirement processing times and access related to Mexico and International Event reputation concerns
- Critical Policy Advancement for the first time, on March 1, 2024, the alberta tourism industry will have a **Dedicated Tourism and Hospitality Stream under the Alberta Advantage Immigration Program**. This was a key request from tourism industry partners

APRIL

- *EVENT*: TIAA hosted Tourism Town Halls in Edmonton, Calgary, Red Deer, Lethbridge and Fort McMurray.
- Economic Performance: Alberta is the first province to exceed pre-pandemic revenues for international visitation in 2023. 2.52 billion up until Q3 vs 2.28 billion 2019

Federal Budget – Released

- The Indigenous Tourism Association of Canada (ITAC) received \$2.5 million for infrastructure and destination development
- No other major changes to announced to existing funding for Ministry of Tourism, or associated Regional Economic Development Agencies (PrairiesCan)
- Announcements related to Housing Investment, Short Term Rental Enforcement, Digital Services Tax

MAY

- Critical Policy Advancement: Emergency Response Group Kickoff Meeting – TIAA Co-Chairing with Travel Alberta, attendees included: NorthStar and Constellation DMOs + Industry Associations

For every million dollars of economic output tourism creates 9.29 jobs vs 6.9 for the economy as a whole.

SUPPORTING JASPER'S RESPONSE AND RECOVERY

Following the devastating Jasper Complex Wildfires, TIAA took swift action to support Jasper's tourism businesses based on their feedback. In collaboration with Tourism Jasper, the Alberta Hotel and Lodging Association (AHLA), and the Association for Mountain Parks Protection & Enjoyment (AMPPE), TIAA conducted a survey revealing urgent challenges, including workforce retention, housing shortages, and financial pressures, with 53% of businesses unable to survive beyond two months without immediate support and nearly half of respondents required some level of staff accommodation to resume operations. Since the release of the initial and subsequent outreach including a Government of Alberta Town Hall hosted by Minister Joseph Schow and moderated by TIAA in late August many business facing support programs have been announced including by the Province of Alberta, the Government of Canada and the Red Cross.

Daily revenue losses for Jasper economy estimated in excess of 3.5mm per day during peak season and 1.22B Insured Damages

JUNE

- EVENT: TIAA AGM
- Edmonton welcomes the world to RVC2024
- Oilers are wildly supported by a city and a province through their cup run

2023 Performance RESULTS

7:1 ROI each \$1 invested by Travel Alberta in new products yielded \$7 in private sector funding, generating \$128 million in private investment and adding \$300 million to Alberta's GDP. Air access recovery delivered a 6.5:1 ROI, restoring 13 routes and over 500,000 seats.

JULY

- Record breaking Calgary Stampede along with fully operational BMO Centre wows crowds. 1,477,953 visitors pass through the front gates
- Jasper Wildfire
 - 25,000 people safely evacuated, 30% of the town lost

AUGUST

- Supported Jasper and Provincial Partners with Advocacy, Information and other
- National fundraising efforts for Jasper Team Society and Canadian Red Cross estimated daily loss from Jasper's closure at \$4.5 million per day
- Joint Survey TIAA-AHLA-Tourism Jasper finds: 60% of surveyed business in Jasper offered staff accommodations prior to the wildfire; two weeks post fire 26% of businesses reported permanent staffing losses
- Severe hailstorm in Calgary is second costliest disaster in Canadian history with \$2.8 billion in estimated losses. Significant damage to YYC Domestic Terminal Building

SEPTEMBER

- The 43rd annual Edmonton International Fringe Theatre Festival spot lit 216 theatre productions across 38 venues, with performances by more than 1,600 artists
- Minister Boissonault announced as federal lead for Jasper's Recovery
- Alberta announces record breaking 2023 Performance
 - \$12.7 billion visitor spend, up 19% over 2022
 - 37.7 million visitors
 - \$1.7 billion tourism related taxes generated by Alberta tourism business in 2023 for local, provincial & federal governments
 - International visitor spending also surpassed pre-pandemic levels in 2023, contributing \$2.9 billion to Alberta's economy in 2023, marking a more than 25% increase from the previous high of \$2.3 billion in 2019

OCTOBER

- Jasper insured losses estimated in excess of \$880 million
- Minister Mark Miller announces significant pullback to employer supported pathways and post graduate work programs. Albertans call for greater provincial control over nomination streams
- Critical Policy Advancement: AIOC mandate expands to tourism

"Over the past five years, the Alberta Indigenous Opportunities Corporation has had great success in facilitating investments in natural resources and is ready to leverage investments in agriculture, telecommunications and transportation projects with up to \$3 billion in loan guarantees. With a growing interest in Alberta's tourism sector, and a high global demand for authentic cultural and land-based tourism, it makes sense to expand the AIOC's mandate to include Indigenous investment in major tourism projects. This new focus will open doors to even more opportunities for Indigenous communities to be partners in prosperity while showcasing their rich cultures, histories, and traditions to the world. Tourism is a powerful driver of economic growth, and with the AIOC's support, we can ensure that Indigenous communities are at the forefront of this vibrant industry."

- Rick Wilson, Minister of Indigenous Relations.

JASPER'S RESPONSE AND RECOVERY continued

Advocacy and information seeking was collaboratively coordinated with many stakeholders. This included rapidly getting visibility into open and closed work permits to protect workers and employers through the recovery process. In a significant win, temporary Work-Sharing measures were secured to help businesses avoid layoffs by allowing reduced employee hours while providing Employment Insurance (EI) benefits. These measures, in effect from December 1, 2024, to August 3, 2025, address Jasper's unique challenges, such as seasonal slowdowns and a shortfall of over 500 room nights per day.

TIAA has strongly advocated for workforce and business support during Jasper's recovery. TIAA will continue to advocate for long-term solutions, including streamlined approvals, appropriate housing solutions, effective wage and economic support, to help businesses recover, retain staff, and restore the community.

- Lonely Planet named Edmonton one of the 30 best destinations for 2025. Ice District, Old Strathcona and Royal Alberta Museum highlighted in travel guide’s breakdown of Edmonton
- **TIAA EVENT:** TIAA 2025 Ottawa Hill Day to Advance Key Messages
- Minister Joseph Schow, Chair of the Canadian Council of Tourism Minister’s host annual gathering in Banff with Canadian tourism leadership represented from coast to coast

NOVEMBER

- Critical Policy Advancement: Parliament passes amendments to the National Parks Act granting the municipality of Jasper planning authority
- **TIAA Event:** Inaugural Tourism Budget Forum and Premier’s Dinner. Premier Danielle Smith presents a vision of tourism that serves Albertans socially, culturally and economically

DECEMBER

- TIAC Congress and Canadian Tourism Awards, Vancouver BC
- Critical Policy Advancement: All Seasons Resort Act passed, a legislative milestone that will support responsible, year-round resort development. This Act is expected to attract billions in private investment, create jobs, and inject up to \$4 billion in GDP within a decade while maintaining Alberta’s world-class environmental standards
- Critical Policy Advancement: ESDC Announces Workshare Program Special Measures for Jasper and the BuniBonibee Cree Nation

ALBERTA TOURISM LEADING NATIONALLY.

The following Alberta-based organizations and individuals received Canadian Tourism Awards:

Business of the Year Award: CanaDream RV, Rocky View County

Business Event of the Year Award: National Gathering of Elders, Edmonton

Culinary Tourism Experience Award: Bar OA Farms, Strathcona County

Lifetime Achievement Award: Cindy Ady, former CEO of Tourism Calgary and former Minister of Tourism, Parks and Recreation

Under-30 Tourism Trailblazer Award: Sierra Murray, Leduc County

“Alberta’s tourism community is remarkable, and I am grateful to have had the opportunity to contribute to its success. I am truly humbled to have received this Lifetime Achievement Award, but it’s not just about me – it’s a testament to the hard work and vision of an entire community, one that has come together to position this province as a leader in the global tourism landscape.”

- Cindy Ady, former CEO of Tourism Calgary and former Minister of Tourism, Parks and Recreation.



ON DECK FOR 2025

Building on the momentum from 2024, Alberta’s tourism industry is set to grow further as TIAA introduces a series of initiatives aimed at strengthening the visitor economy. By supporting tourism operators and communities across the province, TIAA is committed to driving innovation and sustainable success.

FOOD SECURITY AND CULINARY CORRIDORS

TIAA will investigate supporting initiatives that promote food security and the development of culinary corridors in tourism communities. By fostering local food systems, encouraging new production, and reducing reliance on imports, there are many opportunities for the tourism sector to support and add value to Alberta agricultural products and expertise.

ALBERTA TOURISM HILL DAY IN OTTAWA

Annual Alberta Tourism Hill Day in Ottawa, where industry leaders will meet with federal policymakers, MPs, and Senators. The event will include advocacy meetings, presentations to the Tourism Parliamentary Caucus, and an all-party reception to foster collaboration and advance TIAA’s policy priorities.

ALBERTA TAX CREDIT ADVOCACY

Aiming to boost visitation and stimulate tourism investment, TIAA will advocate for a tourism-focused tax credit in 2025. This initiative will focus on encouraging off-peak travel, supporting TDZs, and aligning economic benefits with Alberta’s broader tourism goals.

COMPARATIVE ECONOMIC IMPACT OF TOURISM

In 2025, TIAA will refresh its Comparative Economic Impact of Tourism study to assess the sector’s contributions relative to other industries. The findings will inform advocacy efforts around DMFs, ensuring fair application and reinvestment into tourism growth.

WORKFORCE HOUSING RECOMMENDATIONS

Collaborating with communities across Alberta, TIAA will promote awareness of funding options for workforce housing. By exploring solutions such as housing rebates, zoning reforms, and transportation access, TIAA aims to reduce housing barriers, improve retention, and foster growth in tourism-centric regions.

EMERGENCY PREPAREDNESS PLANNING

To help the industry navigate risks, TIAA will advance advocacy on an Emergency Preparedness Framework in 2025. This initiative will focus on education, resource development, and actionable tools to help operators manage disruptions and strengthen their resilience in an unpredictable environment.

INDUSTRY SENTIMENTS & CONDITIONS SURVEYS

TIAA's Annual Business Outlook Survey conducted by Leger 360 provide year-over-year data on performance trends, workforce challenges, and economic conditions, shaping TIAA's advocacy and research efforts for the year ahead.

ALBERTA TOURISM ADVOCACY SUMMIT

This year TIAA will celebrate five years of leadership at the Alberta Tourism Advocacy Summit, February 9-11, 2025, at the JW Marriott Edmonton ICE District. This annual two-day event will bring together leaders, policymakers, and industry experts to address challenges, explore solutions, and support Alberta's goal of reaching \$25 billion in visitor spending by 2035.

EXECUTING LABOUR STUDY RECOMMENDATIONS

Advancing recommendations from the 2023 Labour Market study completed in partnership with Tourism HR Canada Labour Market Study, TIAA will tackle ongoing workforce challenges in Alberta's tourism sector. This includes supporting policy and planning efforts to improve housing options, transportation access, and immigration pathways in addition to working with educational institutions to strengthen career pipelines for future tourism leaders.

STATE OF THE INDUSTRY REPORT

TIAA's State of the Industry Report will offer fresh insights into Alberta's tourism competitiveness and economic health. By incorporating findings from DMO governance workshops and showcasing destination development best practices, the report will equip stakeholders with actionable strategies to drive industry growth.

TOURISM TOWN HALLS

TIAA, in collaboration with Travel Alberta and Indigenous Tourism Alberta, will host a series of Tourism Town Halls during National Tourism Week in April 2025. These events will provide opportunities for tourism operators to engage directly, share concerns, and discuss strategies for advancing the sector.

ALIGNING PURPOSE, PROFIT AND SUSTAINABILITY IN COMPENSATION CULTURE

Leveraging insights from Alberta employers this project will continue in 2025 with a focus on developing innovative and sector-leading organizational culture and compensation practices within Alberta's tourism industry. By applying global best practices, the goal is to enhance employee satisfaction, improve guest experiences, and support long-term business growth. This project will continue development and research during 2025 to be followed by trial program execution in 2026.



BEYOND RECOVERY: LEADING CANADA'S TOURISM PERFORMANCE

As we close out 2024, it's clear that Alberta's tourism industry has moved beyond recovery and we are setting the pace for the rest of Canada. Thanks to the hard work of businesses, communities, and industry partners, we've seen real growth, renewed confidence, and a strong future ahead.

Tourism continues to be a key driver of jobs, investment, and economic diversification, and TIAA remains committed to advocating for policies that support its long-term success.

To our TIAA members, thank you. Your support has strengthened our collective voice and helped ensure that tourism remains a priority for the Government of Alberta and beyond.

If you're not yet a TIAA member, we invite you to join us. Together, we can keep building a stronger, more resilient visitor economy—one that benefits businesses, communities, and all Albertans.

Thank you for being part of this journey.

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"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 / Peter O'Hara