

labour market **forum**



forum sur le marché du **travail**

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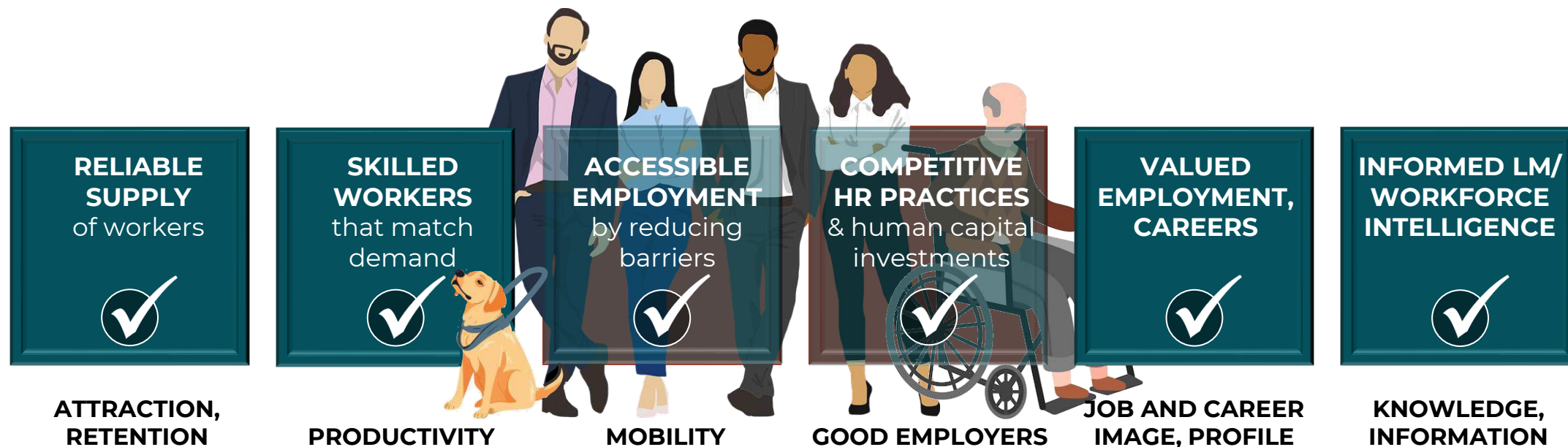




The Honourable Karen Sorensen

Independent Senator for Alberta
Co-Chair, Parliamentary Tourism Caucus

Growing a
Resilient, Competitive, and Inclusive
Workforce



BUSINESS · WORKER REPRESENTATIVES · EDUCATORS · GOVERNMENTS · ADVOCACY BODIES

The
Landscape



Understanding the
labour market
and broader economic
context

The
Difference



Defining what makes
tourism and its
workforce distinct

The
Value



Reframing tourism's
importance to
Canadians and the
economy

The Landscape



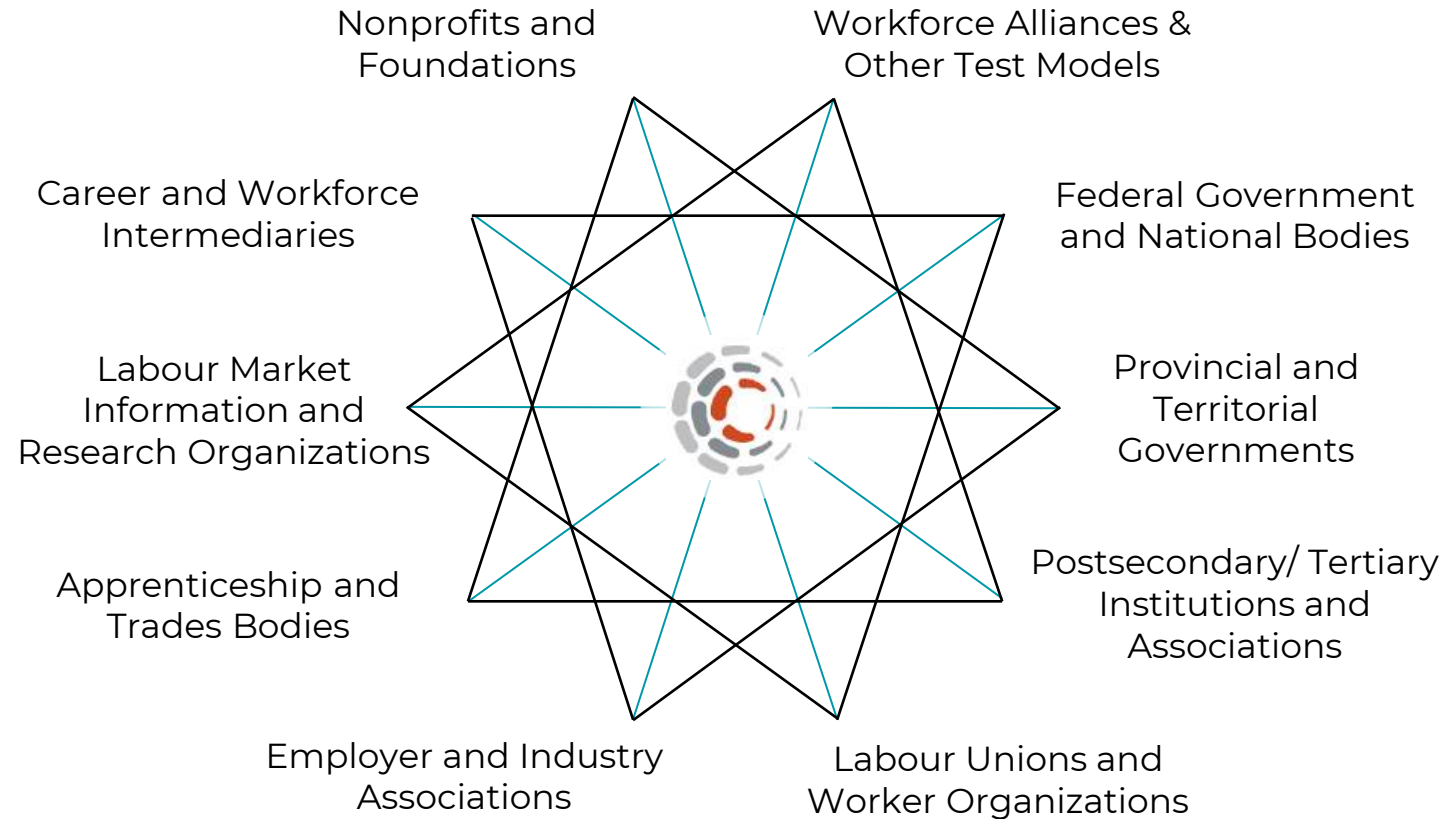
TOURISM WORKFORCE

An Integral and Essential Part of Canada's Workforce Ecosystem

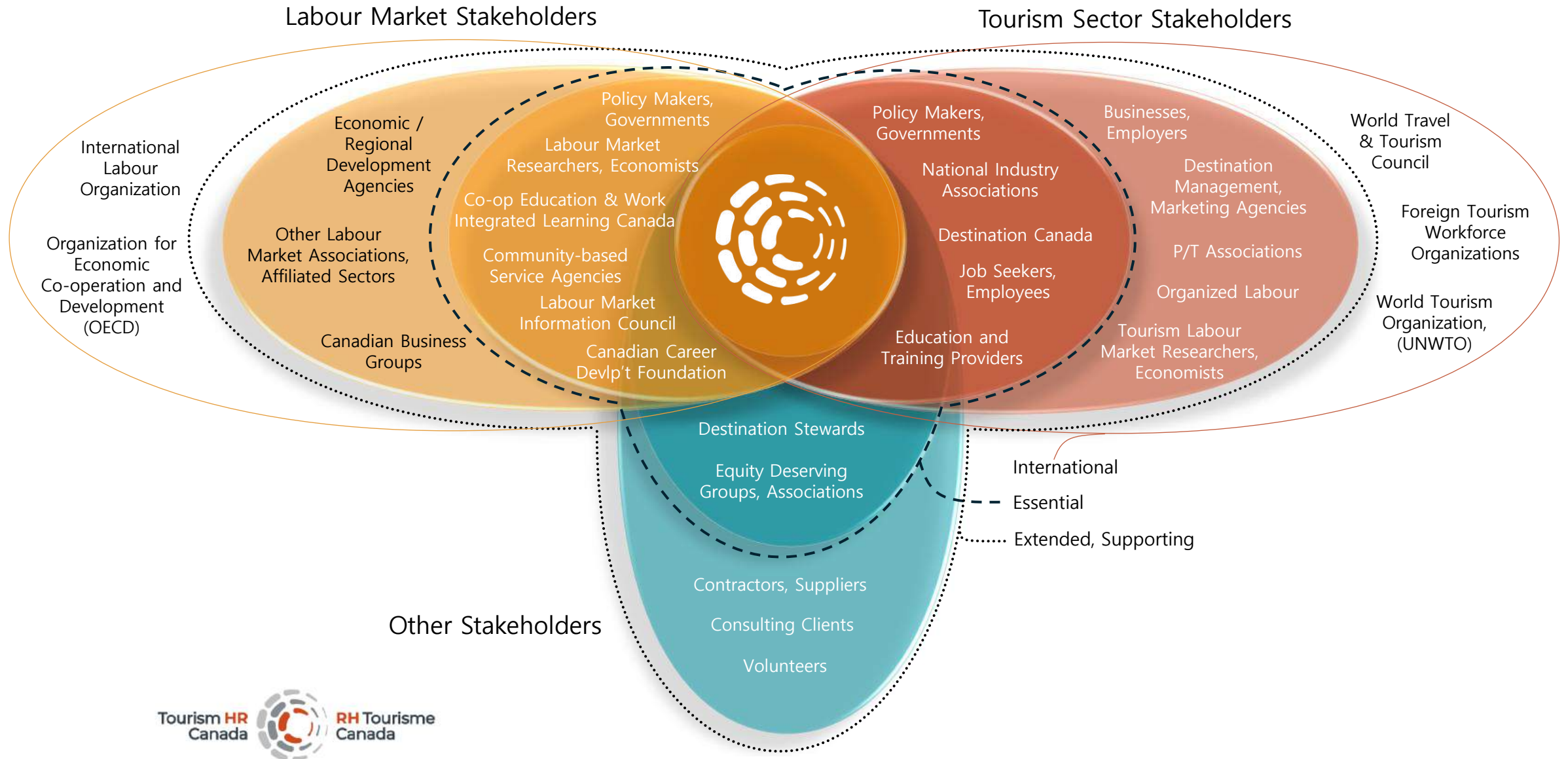


CANADIAN **WORKFORCE ECOSYSTEM**

A DENSE NETWORK OF FEDERAL AND PROVINCIAL BODIES, INSTITUTIONS,
ORGANIZATIONS, UNIONS, AND INDUSTRY GROUPS



TOURISM WORKFORCE A COMPLEX ECOSYSTEM



The Expanded Scope: Redefining the Tourism Workforce

A move to better:

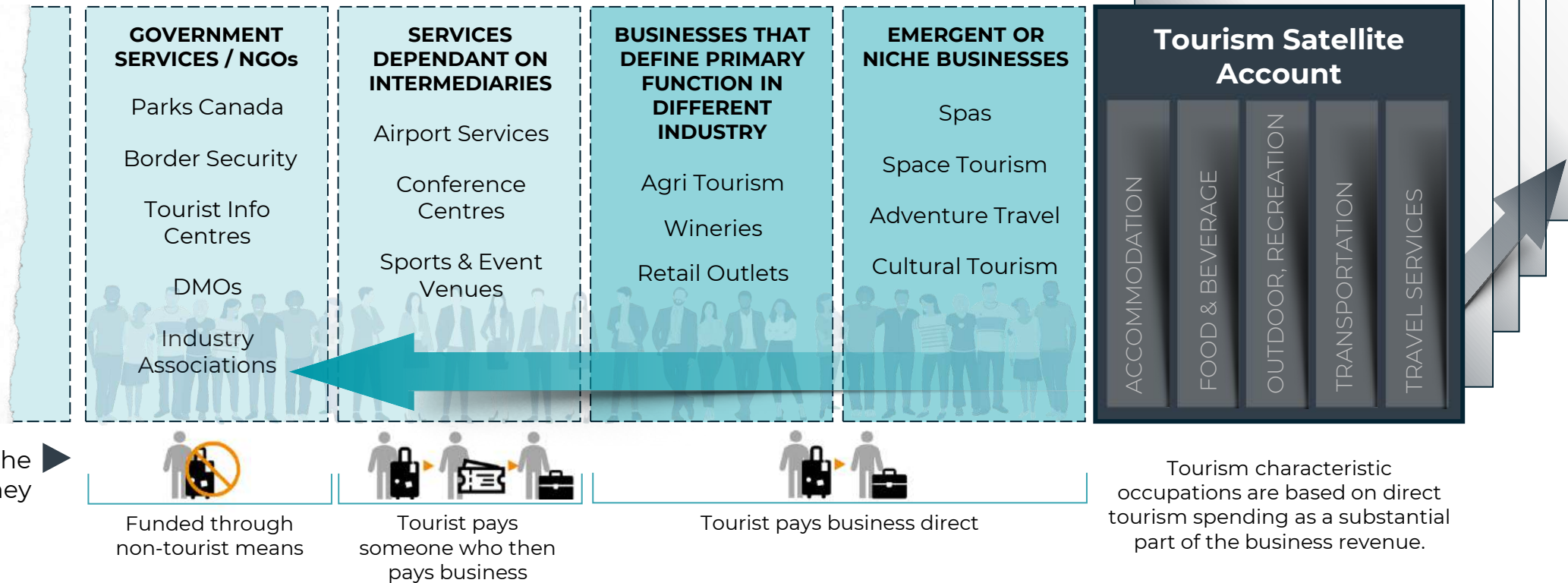
- Understand the complexity of the tourism workforce
 - Improve on data collection and current limitations of existing data
 - Inform better allocation of resources
 - Help develop effective competitive strategies
- ... ultimately, to help better position the sector as a public policy priority

The Expanded Scope

Defining and recognizing workers attributed to the tourism industry in Canada

Looking at TSA data in greater depth

Adding various types of visitor services extends the scope, e.g.





NATIONAL SECTORAL
**WORKFORCE DEVELOPMENT
COUNCILS**

The Essential Infrastructure of Canada's Workforce Ecosystem.



CONSEILS NATIONAUX SECTORIELS POUR LE
**DÉVELOPPEMENT DE LA
MAIN-D'ŒUVRE**

L'infrastructure essentielle de l'écosystème de la main-d'œuvre canadienne.

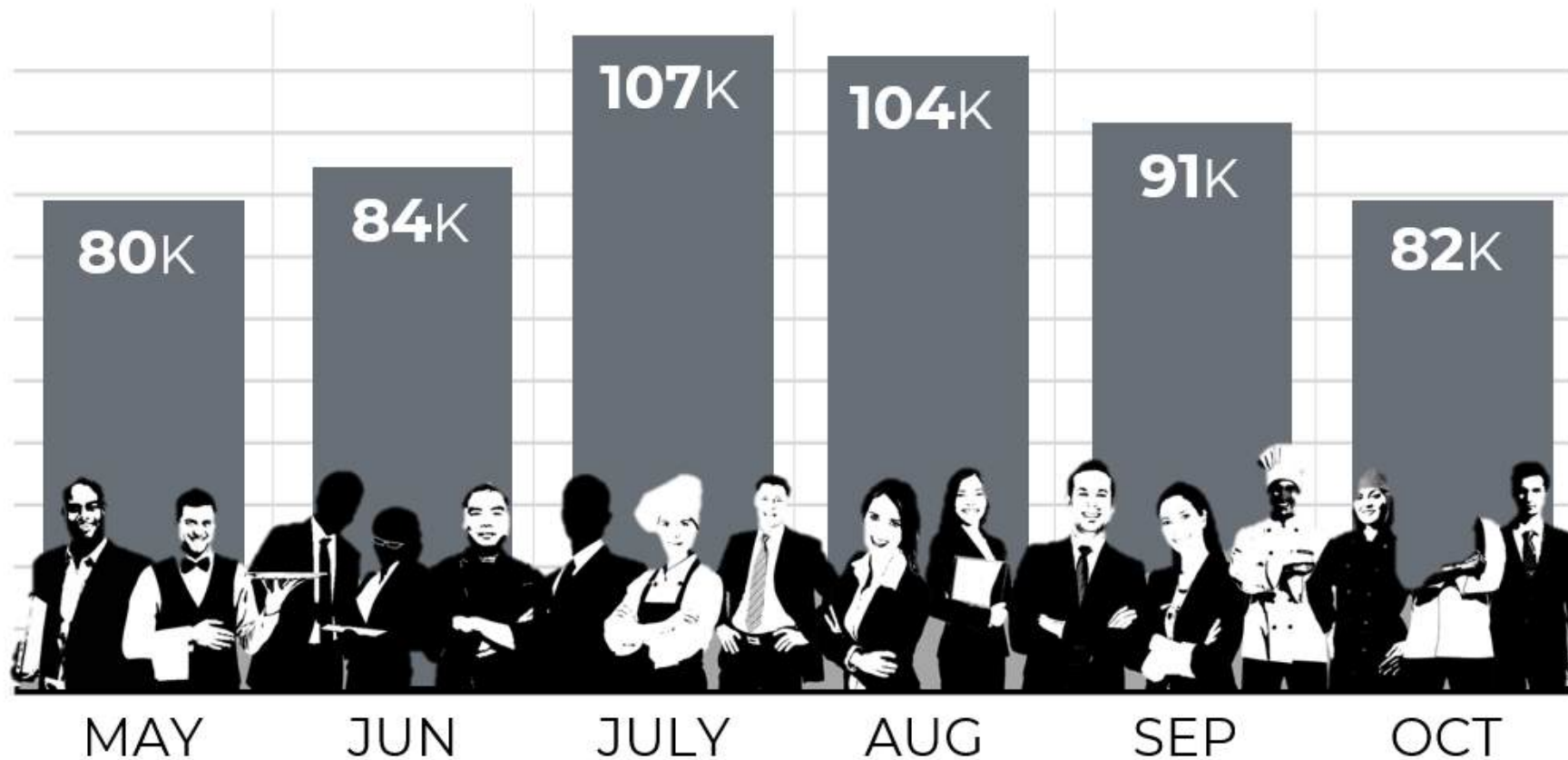
Federal Skills Policy Priorities



Innovation Fund • Youth Employment Skills Strategy • Opportunities Fund

ESTIMATED

Shortfall of Workers



A Workforce in Transformation

CURRENT LABOUR MARKET CONTEXT

Persistent skills mismatches and skill shortages	Rapid technology change, digitalization
Productivity declines	Challenge with skills projections, future-proofing the workforce
Weak alignment between education and labour market needs	Lack of investment and capacity by employers
Structural and systemic barriers	Aging workforce, short supply
Fragmented governance and coordination	Demand for increasingly complex and timely LM info and guidance
Misaligned public policy and labour market program investments	Poor image, sustained reputational damage, lack of understanding

A Workforce in Transformation

CURRENT LABOUR MARKET CONTEXT



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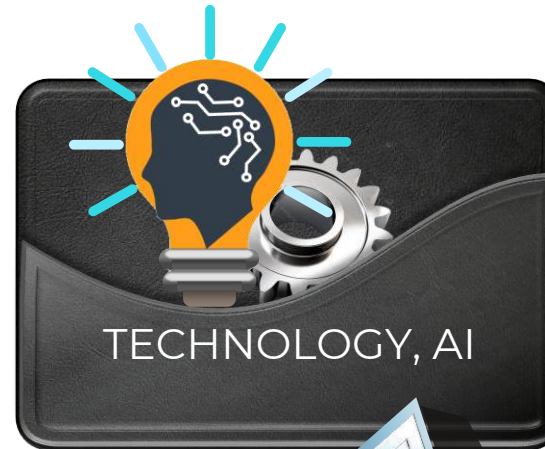
Demand for increasingly complex and timely LM info and guidance

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Poor image, sustained reputational damage, lack of understanding

Drivers of Labour Market Volatility and Transformation

THE TOURISM LABOUR MARKET LANDSCAPE



WORKFORCE PIPELINE

In Short Supply

- Challenges with hiring qualified people
- Most acute in rural, remote and in resorts
- Culinary occupations a major concern; management, operational staff, and 'technology'-related functions also in high demand
- Fewer young people applying: demographic shift, fewer international student and post-secondary students
- Increased competition for labour from other sectors

- ✓ Recognition for the need to aggressively diversify workforce by tapping into less traditional labour pools and demographics
- ✓ Need for all-of-sector strategy to promote jobs and improve image

ESTIMATED
SHORTFALL FOR
2026

UP TO
190,000



Misaligned **PUBLIC POLICY**

- Changing in immigration policy has a major impact
 - International students
 - Temporary Foreign Workers
- Policies identified that deter people from seeking employment in sector:
 - A few Employment Insurance policies of concern
 - Northern housing policy highlighted

- ✓ Advocacy network seeking clarity on the immigration and labour market policies that need to adjusted
- ✓ Additional research needed to provide concrete data to inform policy

NEED TO
**link current
GOC
priorities to
tourism**



IMMIGRATION

A NEED FOR BETTER ALIGNED POLICY

Need for reform, coherent strategy

- ‘One tool’ in the labour market toolbox
- Policy alignment

Immigration is not only about the economy. It is culturally and demographically transformative, requiring a whole-of-government, whole-of-society approach

- Reduced complexity
- Emphasis on permanence and addressing abuses



TECHNOLOGY, AI

Challenges and Opportunities

- AI adoption is outpacing the labour market's ability to adapt
- Currently, adoption is a lot about disruption (not displacement or labour substitution)
- Many tourism jobs require strong cognitive, social and human skills
- AI is expected to result in job creation not job losses
- “Skills are more important than technology”, but investment in technology is essential and digital connectivity still lacking in some regions

- ✓ Shift in types of skills needed is changing rapidly = skills gap
- ✓ Tools, guidance, and financial incentives/supports needed to help employers invest in technology

INCREASED
DIGITALIZATION IS
ESSENTIAL

Resilience
Productivity
Profits



GEOPOLITICAL CONFLICTS

Destabilizing the Workforce

- Inflation, rising costs
- Investments 'on hold'
- Volatility in financial markets affects consumer confidence
- Disruption to business: halting operations, lost revenues, changing markets, damages and brand reputation
- Increasing concerns about supply chain

- ✓ Cautious hiring practices; move towards more temporary and casual workers despite demands for growth
- ✓ Less attractive job offers and reduced ability to compete for labour

PARADOXICALLY:
SHIFTING PUBLIC
OPINION

**Tourism is a
refuge for job
offers, income**



EQUITY AND RECONCILIATION

Social Factors Making a Difference

- Fostering Indigenous-led tourism is a national priority
- Sustainable and regenerative tourism 'on the rise' with growing recognition of related skills shortfall
- Equity, diversity, inclusion remain highly valued by the sector; growing awareness and emphasis on attracting job seekers that identify as having a disability or require some type of accommodation
- Increased labour union activity

- ✓ Significantly more targeted support for Indigenous tourism workforce strategy needed
- ✓ Increased investment in DEI and disability workforce strategies needed



CLIMATE EMERGENCIES

and Other Disruptions

- Increased challenges due to natural disasters (e.g. weather, wildfires)
- Growing challenges with technology (e.g. IT outages, cyberattacks)
- Transportation infrastructure (e.g. reduced airlift)

OPERATIONAL CONSIDERATIONS

Emergency preparedness, evacuations...

Community services, e.g. housing, food services, transportation

- ✓ Changing HR environment: volatility = unstable workforce
- ✓ Need for skills and tools to adapt to circumstances, and to deploy emergency services



ECONOMIC PRESSURES

Uncertainty, Disruption, Losses

- Debt loads stemming from pandemic remain a concern
 - Inflationary pressures increasing, rising costs; reduced profitability
 - Investments 'on hold'
 - Volatility in financial markets affects consumer confidence
 - Disruption to business: halting operations, lost revenues, changing markets, damages and brand reputation
 - Increasing concerns about supply chain
- ✓ Changing HR practices: reduced hiring, reduced hours, shrinking benefits, skills attrition, employment precarity, mental health/wellbeing
 - ✓ Less attractive job offers and reduced ability to compete for labour



CAPACITY CONSTRAINTS

Hampering Recovery and Growth

- Shrinking supply of workers; skills shortages and mismatches
- Retention challenges and loss of tenured workers
- Compounded by lack of housing, transportation, services for workers
- Ability to adapt and adopt technology, AI impacts
- Challenge in adapting product and service offer: new travellers, need for change due to capacity constraints

- ✓ Fundamental challenge: lack of HR management capacity, especially difficult with growing demands on labour and changing labour landscape
- ✓ Costly impacts: reduced... revenues, resilience, ability to compete, productivity, service standards, employee retention = poor image of sector and not viewed as good job or career



How did the tourism workforce compare to the economy overall in 2025?

SIX DIMENSIONS

	Overall Canadian Economy	Tourism
Labour demand	Modest to weak	Strong, resilient
Labour supply	Higher unemployment	Low unemployment
Unemployment trends	Balanced: little change	Growing and persistent shortages
Skill mismatch/shortages	Structural mismatches	Structural mismatches
Seasonality	Less seasonal impact overall	High seasonality, cyclical hiring spikes
Impact of US tariffs	Industry-specific impacts: variable	Rural, remote jobs; increase skill demands



**Entrepreneurs;
Management,
Operational;
Culinary;
Rural/remote
workers**

The Challenge of Workforce Planning

IT'S ALL ABOUT FOSTERING A GOOD WORKPLACE CULTURE. BUT HOW?

Cost versus
investment

Measurement often
lacking

HR is not well
understood

HR as a reactive
process

No dedicated HR
resource

HR is increasingly
complex

Businesses lack
financial needs

Impacted by policies
they have no
control over

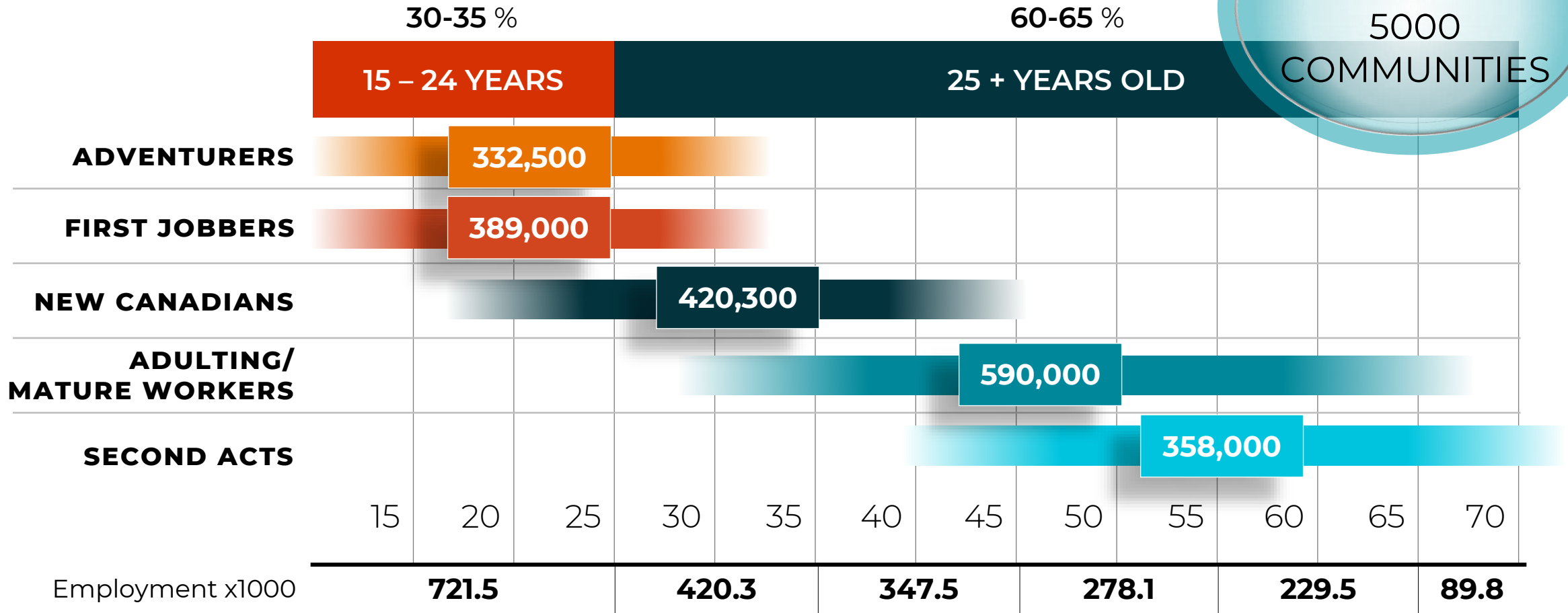
Don't want to engage
in HR programs for
various reasons

The **Difference**



TOURISM WORKFORCE
2.2 MILLION WORKERS
10% of Canada's Workforce

265,800
EMPLOYERS
5000
COMMUNITIES



ROOT PROBLEM

OUR COLLECTIVE CHALLENGE

Addressing Public Sentiment,
The Real and Perceived Social Views on Tourism Employment

Low Wages;
Lack of Benefits

Precarious
Employment,
Limited to Seasonal
and Unpredictable
Employment

Dead-End Jobs,
Limited Career
Progression

Low Skilled
Labour

Stigmatized and
Devalued Work =
Not Treated Well and
Often Mistreated by
Consumers

Unattractive
Working
Conditions

Mistreatment of
Workers, Poor
Workplace Culture

Sector that Abuses
TFW Program and
Marginalized Workers

1

Tourism's Value Proposition Revisited

BEYOND ECONOMIC GROWTH AND BEYOND VISITORS

Long-term
economic
resilience and
competitiveness

Environmental
sustainability

Positive social
outcomes
for host
communities

Community
well-being and
quality of life

Long-term
economic
resilience and
competitiveness

Tourism Jobs Build a Stronger Canada

**Foundational to Social Cohesion, Community Building,
Political Stability, and Economic Resilience**

Tourism Jobs Build a Stronger Canada

Foundational to Social Cohesion, Community Building,
Political Stability, and Economic Resilience



FIRST JOBS, CAREER SKILLS

Preparing Workers for Canadian Jobs



STABLE INCOME, SURVIVAL JOB

Contingency Employment, Retreat Positions,
Gateway to other Jobs (Feeder)



INDIGENOUS RECONCILIATION

Fundamental to the Calls to Action



COMMUNITY ANCHOR

Infrastructure to Support Rural and Remote
Communities, Immigrant Populations



CANADIAN VALUES, IDENTITY

Social and Cultural Cohesion



EMERGENCY RESPONSE, ESSENTIAL SERVICES

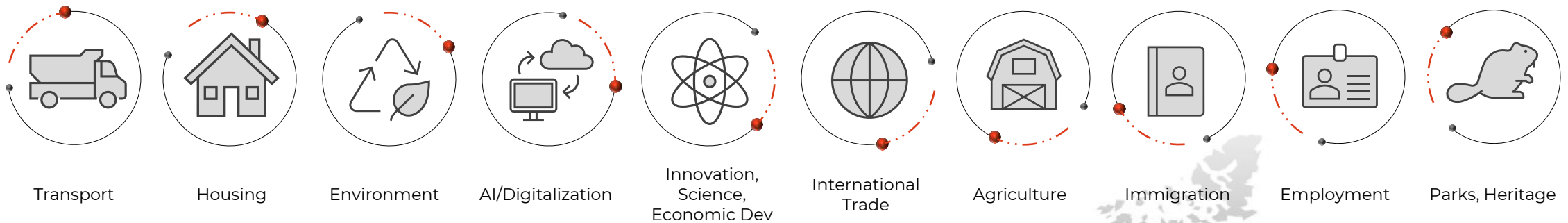
Housing, Food Services, Transportation

‘Significant Impact on aspects of everyday life for Canadians’



Improved Governance, Coordination

MORE INTEGRATED, AGILE AND COLLABORATIVE



Whole-of-government approaches

Multi-level governance

Stronger horizontal and vertical coordination

Flexible and anticipatory policy frameworks



Resilience and Adaptation a Policy Priority

ESSENTIAL FOR TOURISM'S FUTURE

KEY STRATEGIES

WORKFORCE &
SUCCESSION
PLANNING

INVESTING IN
TALENT
DEVELOPMENT

LEADERSHIP
DEVELOPMENT

EMPLOYEE
WELLBEING

WORKPLACE
CULTURE

PERFORMANCE
MANAGEMENT

TECHNOLOGY
INVESTMENT

KNOWLEDGE
MANAGEMENT

BUILDING RESILIENCE

Improve crisis preparedness

Strengthen adaptive capacity and performance management

Develop new skills and institutional capability

Embed risk assessment into planning; prepare for workforce disruptions

Support effective adaptation strategies; foster adaptability

Focus on succession planning

Emphasize employee well-being, healthy workplace

Invest in digital tools

4

Data, Digitalization and AI are Strategic Enablers

INVESTING IN OUR FUTURE

AI ADVANTAGE

Visitor experiences
Accessibility
Operational efficiency
Market intelligence
Destination management
Strategic planning

THE POWER OF **BETTER DATA INFRASTRUCTURE** AND **DATA UTILIZATION**

Investing in integrated, granular and real-time tourism data
Improving evidence-based policy making
Improving data integration
Better communicating evidence to decision-makers
Harnessing official statistics
Embedding evidence into policy design and implementation.

5

Favourable Policy and Program Investments

CREATING A COMPETITIVE AND ENABLING ENVIRONMENT



Immigration



Targeted Employment
Insurance Policies



Youth, Work
Integrated Learning



Workforce skills development

Streamlined regulation

Improved access to finance

Institutional capacity building

Support for digital and sustainable transitions



It's All About Community

& MEANINGFUL STAKEHOLDER ENGAGEMENT

SHARED VALUES, CRITICAL SERVICES FOR RESIDENTS (AND VISITORS)

- Maximizing local economic benefits
- Supporting local businesses
- Encouraging economic diversification
- Promoting local value creation
- Ensuring tourism contributes to
community well-being

STAKEHOLDER ENGAGEMENT IS KEY

- Strong public-private partnerships
- Active engagement with industry stakeholders
- Tourism associations providing a unified sector voice
- Tourism councils facilitating ongoing dialogue
- Policies that reflect on-the-ground realities



Regional Tourism Research Labs



Examining conditions that
limit or promote tourism
labour force participation, and
support improved business
productivity and rural
economic development

- Digby **NS**
- Golden **BC**
- Lac-Mégantic **QC**
- Manitoulin Island **ON**

Tourism HR
Canada



RH Tourisme
Canada

INTELLIGENT INTELLIGENCE

Artificial Intelligence



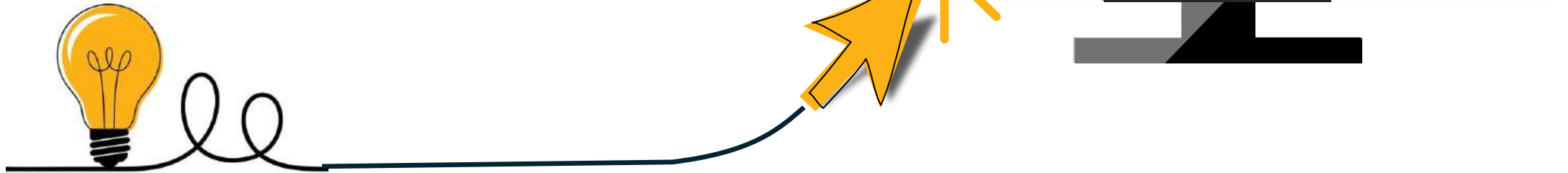
The Growth of Daisy

AN IDEA THAT STARTED 20+ YEARS AGO

Building on 30 years of skills standards set by industry

- Updated, ratified library of competencies
- Dynamic, new AI-integrated tech platform
- New diagnostic resources, practical tools

Employers | Educators | Job Seekers | Workers



AI-driven HR Tools

MANAGING HUMAN CAPITAL IN A NEW WORLD



- Talent acquisition and hiring
- Skills gaps and workforce planning
- Learning and development
- Career mobility and retention
- Performance management
- Organizational structure and design
- Succession planning



The **Value**



Reconciling Paradoxical LM Questions

“ People
without jobs,
jobs without
people

With unemployment rising, why can't employers fill jobs?

- Skills mismatch (structural unemployment)
- Geographic mismatch (and lack of mobility supports)
- Wage mismatch
- Unfavourable working conditions
- Unrealistic credentials required (job posting mismatches)

You can solve
your problem
if you just
pay more

Why are wages not rising faster if there's a labour shortage?

- Profit pressures and structural nature of the industry
- Competition; reduced bargaining power
- Employers may prefer understaffing over higher labour costs

Reconciling Paradoxical LM Questions

“
Tourism jobs
are not
desirable

Why are shortages persistent in the tourism sector?

- Society values certain sectors over others
- Lack of appreciation for value or essential services provided by sector (industry is misunderstood)
- Jobs in certain sector are difficult, have a lot of emotional strain, offer modest pay, misalignment with lifestyle needs

Immigrants
take away
Canadian jobs

Why reduce immigration levels when there is a demand for workers?

- Strain on housing / infrastructure (rents, housing prices, pressures on healthcare and schools, transit congestion)
- Mismatch between worker shortages and immigration inflows
- Political pressures / response to misaligned public sentiment

Reconciling Paradoxical LM Questions

“ Do you actually have a shortage of workers? ”

Employers say they need workers, but they are not hiring. Why?

- Economic uncertainty
- Budget restrictions, limited cash flow
- Investing in changes to their operations, product and services (e.g. digitalization, use of technology) to reduce operational costs and reduced reliance on labour
- Extreme selectivity / misguided hiring practices
- Use of ‘ghost jobs’ / false openings to gage market demand

Addressing these questions helps counter common criticisms of our sector — particularly the perception that the work is low-skilled and can be performed by anyone.

VALUE PROPOSITION

**Tourism is synonymous with Canada's identity:
it emphasizes social capital and cohesion,
promotes inclusion and diversity, and contributes
to cultural and heritage preservation,
Indigenous reconciliation, and overall wellbeing.**

- Tourism HR Canada

VALUE PROPOSITION

The tourism sector can provide decent jobs, helping to build resilient, sustainable, gender-equal, inclusive economies and societies that work for everyone.

-- UN Secretary-General Antonio Guterres

VALUE PROPOSITION

High intensity of labour within the industry makes it a significant source of employment and places it amongst the world's top creators of jobs that require varying degrees of skills and allow for quick entry into the workforce [by under-represented groups]. -- ILO

In the **Spotlight**

RECENT HIGHLIGHTS

Belong

800+ businesses
200 + job seekers



**Nationally Recognized
Pro-Abilities Employer**

A Welcoming Workplace

In the **Spotlight**

RECENT HIGHLIGHTS

propel

\$6,000,000+ subsidies
180 employers



In the **Spotlight**

RECENT HIGHLIGHTS

emerit[®].ca

Expanded networks = 50% of sales

127 newly Certified Professionals

1,300 new learners

New pilot launched

95%

of learners
recommend
Emerit

In the **Spotlight**

RECENT HIGHLIGHTS

SMART+



In the **Spotlight**

RECENT HIGHLIGHTS



EXPLOREZ LE
TOURISME^{MC}



L'ACADÉMIE CANADIENNE
DU VOYAGE ET DU TOURISME

New career profiles

Expanded video series

Updated global educational portal

In the **Spotlight**

RECENT HIGHLIGHTS

LMI Research &
Policy

New national and international
partnerships

Expanded francophone content

Monthly updated statistics

Business conditions
Compensation
Demographic profile
Labour supply/demand
Perception surveys
Workers by riding
Regional and sub sector
reports
State of industry
Productivity

In the **Spotlight**

RECENT HIGHLIGHTS



New and Extended, Formalized
Partnerships

Industry-Led, Government Supported Programs



DISCOVER
TOURISM®

Career Exploration Tools,
Attracting and Retaining Talent

DiscoverTourism.ca

emerit®.ca

Canada's Most Recognized Tourism
Training and Credentials

Emerit.ca



LMI

Foundational Labour Market
Information System

Belong

Building IDEAL Workplaces

Strengthening Tourism's Capacity to Offer Inclusive,
Diverse, Equitable and Accessible Workplaces

BelongTourism.ca

propel

Launching Careers in Tourism

Subsidies for Student Employment, Work
Integrated Learning

daisy

TOURISM SKILLS DATABASE

Interactive Tool to Apply the
Most Current Skills

DaisySkills.ca



CANADIAN ACADEMY
OF TRAVEL & TOURISM

Free, Flexible High School
Teaching Resources

TourismHR.ca/CATT

ACCREDITATION
SMART+
ACCREDITATION

Recognizing Education and Training
Institutions Endorsed by Industry

TourismHR.ca/SMART

Insights to
help build a
competitive
workforce

Tourism
**HR
Insider**

E-Newsletter/Blog to keep you Informed



Current Project Proposals

WE NEED YOUR SUPPORT



Employment and Social
Development

Emploi et Développement
social

Canada



WOMAN AND GENDER EQUITY FUND

Improving Women's Access to
Leadership Opportunities



STUDENT WORK PLACEMENT PROGRAM

Extending the
Propel Program



SECTORAL WORKFORCE INNOVATION FUND

Rapid Skills Pathways for
Displaced Workers

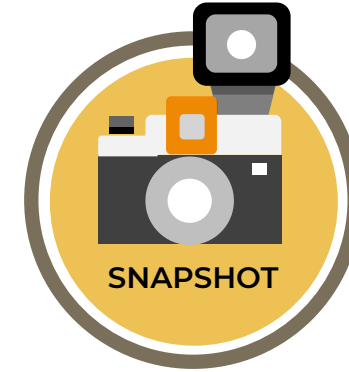


OPPORTUNITIES FUND FOR PERSONS WITH DISABILITIES

Scaling the
Belong Project

Annual LM Study

CURRENT WORKFORCE CONTEXT



- Strong reliance on seasonal labour
- Highest turnover with frontline occupations
- 72% experiencing job vacancies
- 83% report executive leadership hardest to fill
- 46% “meeting employee wage expectations”; 34% unable to
- Supply chain procurement, extra costs for goods and services a growing concern and problem
- AI adoption remains limited, modest; cautious interest

