



# Pulling Together:

## The Productivity and Skills Agenda



Prepared for Tourism HR Canada by  
Qatalyst Research Group



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Tourism HR Canada  
901-275 Slater Street  
Ottawa, ON K1P 5H9  
Canada  
TourismHR.ca  
Research@TourismHR.ca

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

Tourism HR Canada is recognized as a global leader in setting occupational standards, building competency frameworks, developing occupational training and certification programs, conducting research into the tourism labour market, and analyzing the resulting data to plan and implement HR strategies for the industry.

Tourism HR Canada supplies tourism stakeholders with the labour market intelligence they need to plan for and overcome their current and future human resource challenges.

For more information, email [Research@TourismHR.ca](mailto:Research@TourismHR.ca) or visit [TourismHR.ca](http://TourismHR.ca).

The word 'Canada' is written in a large, black, serif font. A small Canadian flag is positioned to the right of the letter 'a'.

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The opinions and interpretations in this publication are those of the author  
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# Introduction

## 1.1 Meet Tourism HR Canada

Tourism HR Canada is a pan-Canadian organization with a mandate aimed at building a world-leading tourism workforce. It facilitates, coordinates, and enables human resource development activities which support a globally competitive and sustainable industry and fosters the development of a dynamic and resilient workforce. Tourism HR Canada is recognized as a global leader in setting occupational standards, building competency frameworks, developing occupational training and certification programs, conducting research into the tourism labour market, and analyzing the resulting data to plan and implement HR strategies for the industry. The organization supplies tourism stakeholders with the labour market intelligence needed to plan for and overcome their current and future HR challenges.

## 1.2 About Tourism HR Canada's Labour Market Research Project

In December 2021, Tourism HR Canada launched a three-year research project on the tourism workforce. Funded by Employment and Social Development Canada's (ESDC) Sectoral Initiatives Program, this comprehensive research aimed to maintain the foundational labour market information system necessary to help minimize labour and skills imbalances and shortages while ensuring that Canada's tourism sector remains globally competitive and innovative. A list of reports and other releases associated with this project is available in **Appendix A**.

## 1.3 About This Report

This report summarizes the research stemming from Tourism HR Canada's three-year research project. It presents actionable information, insights, and recommendations to influence policy and support workforce development and workplace culture. Including this introduction chapter, the report is divided into six chapters. **Chapter 2** provides key insights related to the current state of the tourism sector today. **Chapter 3** discusses the economic drivers of tourism. **Chapter 4** provides key insights into the labour market's challenges and opportunities, while **Chapter 5** offers future considerations for the sector. Finally, **Chapter 6** offers closing thoughts including priorities for the sector going forward.



# The Tourism Landscape

## 2.1 Context

The Canadian tourism sector has been a significant economic driver, generating over \$80 billion annually and attracting over 18 million foreign visitors each year. As of July 2024, the tourism labour force accounted for 10.6 percent of the total Canadian labour force. The sector encompasses five key industries: Accommodation, Food and Beverage Services, Recreation and Entertainment, Transportation, and Travel Services. Much of Canada's tourism activity is centred around four major cities (Toronto, Montreal, Vancouver, and Ottawa), which are well known for their culture, diversity, and historical sites. Tourism continues to be a people-powered sector that supports over 2 million families across Canada. Despite the importance of tourism to the Canadian economy, the sector grapples with persistent challenges related to its image and credibility.

The tourism workforce is diverse, and worker characteristics and demographics continue to shift. Despite continued population growth, Canada's population is aging due to declining birth rates and rising life expectancy<sup>1</sup>. This aging population is creating a growing gap between job vacancies and job seekers as older workers retire or reduce their hours. The sector is also struggling with labour shortages, exacerbated by the COVID-19 pandemic, which led to significant job losses.

The following discussion will delve deeper into some key insights and information relating to the current state of the sector, including workforce characteristics, stakeholder perceptions, and workforce motivations and development needs. Recommendations for policy, research, and business practices to address any gaps in these areas are offered in **section 2.3**.



<sup>1</sup> Statistics Canada (2024). Population projections: Canada, provinces and territories, 2023 to 2073. *The Daily*.  
<https://www150.statcan.gc.ca/n1/daily-quotidien/240624/dq240624b-eng.htm>

## 2.2 Discussion

### Current State of the Sector

**The sector faces both labour shortages and a projected future worker deficit.** The tourism sector faces a critical labour shortage, although projections suggest an overall projected deficit of only 4,000 workers by 2040<sup>2</sup>, but this masks considerable variability at the industry level. For example, food and beverage services is projected to have a shortfall of around 28,000 workers, while recreation and entertainment will see a sizeable surplus. Before the COVID-19 pandemic, over two million Canadians worked in tourism; however, by April 2020, 880,000 of those jobs had been lost<sup>3</sup>. As a result, many businesses are now struggling to recruit and retain qualified staff, hindering their ability to meet rising demand. The accommodation industry bore the brunt of these losses, with current employment remaining nearly 60,000 jobs below pre-pandemic levels. Food and beverage services and transportation experienced minor changes from 2019, while the recreation and entertainment workforce expanded by 8.4 percent, adding nearly 56,000 jobs. As of September 2024, most tourism industries (excluding recreation and entertainment and transportation) had yet to fully recover their labour force and employment to pre-pandemic levels. And as older workers retire and businesses expand over the coming years, approximately 3.9 million jobs are expected to open between 2019 and 2028, further exacerbating the existing worker shortage. Tourism businesses will need to adapt to a smaller pool of workers by developing strategies such as embracing different employment arrangements, offering new service experiences, and developing unique products and services.

**The tourism workforce is diverse, and worker demographics are changing.** It's crucial for the sector to understand and thoroughly research the impacts of changing workforce demographic on both businesses and employees. Recent statistics show a greater share of young people, immigrants, non-permanent residents, and visible minorities participating in the sector's employed labour force<sup>4</sup>. Indigenous people account for approximately 4 percent of the tourism workforce and tend to be in the younger age group<sup>5</sup>. The workforce is relatively evenly divided between genders (with some variations across industries), and over half of the workforce has a post-secondary diploma or higher<sup>6</sup>. Mature workers (people over the age of 55) will account for 40 percent of the workforce by 2028<sup>7</sup>.

As older workers retire and businesses expand over the coming years, approximately 3.9 million jobs are expected to open between 2019 and 2028.

<sup>2</sup> The Conference Board of Canada (2024). *The Future of Canada's Tourism Sector: Labour Demand and Supply Analysis*. Prepared for Tourism HR Canada. <https://tourismhr.ca/labour-market-information/reports/labour-market-projections/labour-demand-and-supply-analysis/>

<sup>3</sup> Statistics Canada, accessed via Tourism HR Canada's *Rapid reSearch Tool*. <https://tourismhr.ca/labour-market-information/rapid-research-tool/>

<sup>4</sup> Leger Marketing (2024). *General Population Survey: Assessing Perceptions of Tourism as a Place of Employment in Canada*. Prepared for Tourism HR Canada. <https://tourismhr.ca/labour-market-information/reports/workforce-strategy/perceptions-of-tourism-as-a-place-of-employment-in-canada/>

<sup>5</sup> Tourism HR Canada (2024). *Indigenous Peoples: Profile of Indigenous Tourism Workers*. Adapted from Statistics Canada Census 2021. <https://tourismhr.ca/labour-market-information/tourism-census/>

<sup>6</sup> Tourism HR Canada (2024). *National Summary: Profile of Canada's Tourism Employees*. Adapted from Statistics Canada Census 2021. <https://tourismhr.ca/labour-market-information/tourism-census/>

<sup>7</sup> Tourism HR Canada (2023). *Tourism's Double-Barrelled Labour Challenge: Barriers to Employment and Skills Mismatches*. <https://tourismhr.ca/labour-market-information/reports/workforce-strategy/tourisms-double-barrelled-labour-challenge-barriers-to-employment-and-skills-mismatches/>



**The reasons why workers choose to enter or exit the tourism sector are important to understand in supporting attraction and retention efforts.**

Many individuals enter the tourism sector because they are seeking temporary work arrangements, searching for other career options, looking for flexible hours, or trying to find a position that aligns with their interests/skills. Key reasons for leaving the sector include non-competitive wages and insufficient benefits. Low wages are also cited as a deterrent to long-term careers in the sector. For those who have never worked in the tourism sector, better career opportunities, disinterest, and skill mismatches are commonly noted reasons for not pursuing a tourism job. During the pandemic many experienced staff left the sector, and recent graduates had limited opportunities to gain practical experience through work-integrated learning. For many workers, returning to work was challenging (e.g., employment that was precarious due to constantly changing regulations and restrictions) or not feasible (e.g., workers who were part of high-risk groups, or those needing to prioritize family caring responsibilities). Staying current on workforce motivations can better support business in talent attraction and retention efforts. By way of example, competitive wages, promoting work-life balance, flexibility, and opportunities for training and career advancement remain essential for attracting people to roles such as housekeeping, serving, and food preparation that continue to face staffing challenges.

**Increased tourism stimulates economic growth, but can also strain businesses as they strive to meet increased demand.** Significant efforts are underway to position Canada as a top global tourism destination and create tourism demand<sup>8</sup>. While increased tourism would certainly benefit the economy, tourism businesses will need to grow their workforces to meet the rising demand, or risk damaging a destination's brand through poor delivery of services. The changing nature of work in tourism (i.e., workers needing to take on more job functions and overlapping responsibilities) will also

necessitate additional investments in employee development and training. Overall, increased tourism, when coupled with persistent labour challenges, can harm both communities and businesses. As such, investment in tourism workforce development should be commensurate with that spent on creating tourism demand.

**Negative perceptions about tourism as a place of employment is a persistent challenge in the sector.**

Regardless of personal experiences in the sector, most Canadians perceive tourism jobs as diverse, valuable, and interesting. They also recognize the importance of tourism to the Canadian economy. That said, in appealing to potential workers, the sector continues to face challenges related to its image and credibility. Examples of common misconceptions about the sector and its workforce include:

- *Mischaracterization of skills:* Positions in the sector are often perceived as low-skilled. People are often not aware of the wide range of occupations associated with tourism, or the social and technical skills associated with those occupations.
- *Underestimated local impact:* The sector is often viewed as primarily benefiting visitors, although in fact it is a significant economic driver for local economies, and tourism businesses are often at the heart of their communities.
- *Undervalued employment:* The tourism sector is one of the largest sources of employment and employment income across Canada, and serves as an important employer in many communities. It provides many people with their first job opportunities, and develops core employability skills that will stay with workers throughout their careers.

Initiatives such as Tourism HR Canada's **Discover Tourism** aim to reshape public perceptions of tourism jobs, and to improve that sector's ability to attract, train, and retain top talent.

<sup>8</sup> Destination Canada (2023). Tourism 2030: A World of Opportunity. <https://www.destinationcanada.com/en/programs/destination-canada-2030-tourism-strategy>

## 2.3 Recommendations

### POLICY-FOCUSED RECOMMENDATIONS

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- **Match investment in workforce and career development with that in generating increased demand for tourism.**

Without a trained workforce, Canada will not be able to meet the demand generated by active destination marketing campaigns, and our global brand will suffer.

### RESEARCH-FOCUSED RECOMMENDATIONS

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- **Develop a more comprehensive understanding of worker motivations.**

A deeper understanding of why individuals make the decision to enter or leave the tourism workforce will better inform attraction and retention strategies.

- **Better understand the impact that demographic shifts in the population will have on the future workforce.**

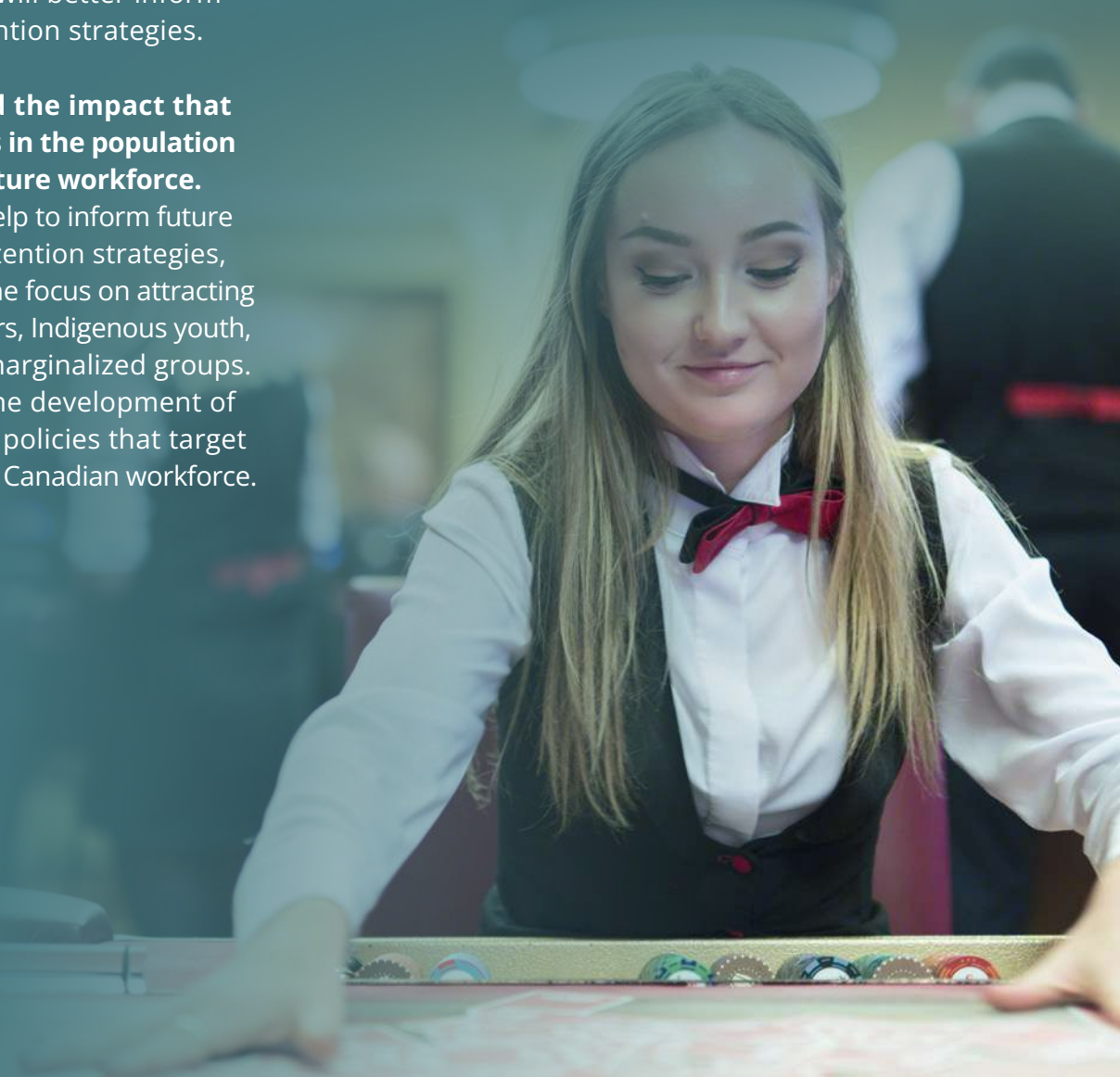
Such research will help to inform future recruitment and retention strategies, such as increasing the focus on attracting more mature workers, Indigenous youth, and economically marginalized groups. It will also inform the development of future immigration policies that target specific needs in the Canadian workforce.

### BUSINESS-FOCUSED RECOMMENDATIONS

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- **Adopt different tactics and strategies to adapt to an evolving workforce landscape.**

Confronted with demographic shifts and staffing shortages, Canadian tourism operators will need to explore new tactics and strategies to attract and retain the future leaders of the sector. Operators will need to rethink their compensation structures, look at how to better engage with technology to improve productivity, and actively seek opportunities to collaborate with other businesses to make the most of their local pool of workers.





# The Economic Drivers of Tourism

## 3.1 Context

Global trends and geopolitical tensions continue to shape the overall Canadian economy, including the tourism sector. This sector is strongly impacted by the housing crisis, stagnant Gross Domestic Product (GDP), high inflation, tighter monetary policies, increased travel costs, and a wide range of labour constraints<sup>9</sup>. During the COVID-19 pandemic, tourism businesses were among the first to shut down and the last to completely reopen, resulting in severe operational constraints that have continued to hinder growth. The loss of experienced staff during the pandemic has left a void in the sector that is proving difficult to fill. In 2023, many tourism businesses were operating at or below 80 percent of their full capacity due to insufficient workforce availability. This has led to delays in business investments, existing employees being overworked, and a clear drop in customer satisfaction.

The sector was able to survive the global health crisis through strategies such as adopting new operating models, forging new partnerships, and implementing creative recruitment and marketing strategies to name a few. By August 2023, most businesses had resumed normal operations without restrictions<sup>10</sup>, and it will be important that businesses continue to maintain the more successful of these innovations as business operations return to normal.

Changing economic conditions have led to an uneven recovery across regions, characterized by significant declines in global trade and financial flows to developing countries. The Canadian economy continues to face uncertainty, with some experts predicting a recession while others express confidence in its resilience. The horizon for Canadian businesses is also clouded by the threat of persistent natural disasters and geopolitical instability. Rapid technological advancements, such as AI and 5G, are reshaping a global landscape already undergoing rapid change due to rising geopolitical tensions.

Tourism is strongly impacted by the housing crisis, stagnant Gross Domestic Product (GDP), high inflation, tighter monetary policies, increased travel costs, and a wide range of labour constraints.

The following section will delve deeper into the economic factors impacting the tourism sector as outlined in the literature and identified through this research project. This includes the effects of the global health crisis, rising costs, gaps in infrastructure, and the outlook for tourist travel. Recommendations for policymakers, researchers, and businesses to address these challenges are offered in section 3.3.

<sup>9</sup> The Conference Board of Canada (2024). *The Future of Canada's Tourism Sector: Labour Demand and Supply Analysis*. Prepared for Tourism HR Canada. <https://tourismhr.ca/labour-market-information/reports/labour-market-projections/labour-demand-and-supply-analysis/>

<sup>10</sup> Leger Marketing (2023). *Business Intelligence Survey: Labour Market Information, August–September 2023*. Prepared for Tourism HR Canada. <https://tourismhr.ca/labour-market-information/reports/workforce-strategy/business-intelligence-survey-report/>

## 3.2 Discussion

### Economic Factors Impacting Tourism

**The COVID-19 pandemic presented significant challenges for tourism operators, forcing them to seek creative solutions to maintain business operations.**

While initial pandemic-related regulations and restrictions posed obstacles, some businesses were able to adapt more easily than others, leveraging government programs or adapting their operations. For example, changes to the Temporary Foreign Worker Program provided flexibility and relief, which helped businesses navigate staffing shortages. Some businesses developed new products or service offerings (e.g., restaurants adapted with outdoor dining and social distancing, while hospitality businesses offered quarantine suites and services to essential workers). Additionally, many long-established businesses seized the opportunity provided by the slowdown to invest in upgrades, website redesigns, and digitalization<sup>11</sup>. However, for some tourism operators, this period brought about severe financial difficulties (e.g., cash flow problems, struggles to meet operational expenses, and worries about incurred debt). To mitigate some of these issues, businesses have needed to adjust prices, cut costs, and postpone investments.

**Financial impacts continue to influence the way Canadian businesses operate.**

The pandemic led to increased inflation and eventually tighter monetary policy, both of which have had an impact on tourism businesses and on consumers' decisions to travel. From 2019 to 2023, revenues in the tourism sector grew by 13.9 percent; however, prices in the sector increased by 18.5 percent over the same period, resulting in negative real growth<sup>12</sup>. Significant inflationary pressures continue to affect affordability for many people, reducing disposable incomes and leading average-income households to cut back on travel spending or to choose cheaper travel options. Inflationary pressures are more likely to disproportionately affect smaller businesses with limited financial resources, which characterizes a substantial proportion of tourism businesses. Rising debt levels, escalating costs, and stagnant government funding are prevailing issues facing tourism enterprises. Finding more cost-effective approaches and ways to streamline operations will be essential in helping businesses thrive while costs continue to rise.



<sup>11</sup> Tourism HR Canada (2023). Workplace Culture and Compensation: Insights from Operators. <https://tourismhr.ca/labour-market-information/reports/workforce-strategy/tourism-sector-compensation-study/>

<sup>12</sup> The Conference Board of Canada (2024). *The Future of Canada's Tourism Sector: Labour Demand and Supply Analysis*. Prepared for Tourism HR Canada. <https://tourismhr.ca/labour-market-information/reports/labour-market-projections/labour-demand-and-supply-analysis/>

**The sector is experiencing a post-pandemic resurgence in tourist travel and growing revenues, but traveller preferences continue to evolve as economic conditions shift.** By 2030, the sector is projected under some models to contribute nearly \$163 billion to the economy and directly support around 1.64 million jobs. Recent data shows that visitor numbers in 2023 surpassed pre-pandemic levels, primarily driven by domestic leisure travel and day trips. While domestic tourists accounted for a significant portion of tourism-related revenues in 2023 (approximately 70.7 percent), there is anticipation that the share of the sector's revenues generated by international tourists will increase as travel in that segment continues to recover. Changing traveller preferences will also influence revenue generation and visitor attraction to Canada, in ways that are not always easy to anticipate. In recent periods, accommodation, dining, and cultural attractions have been top priorities for travellers when selecting a destination to visit. Tourist preferences may be developing along different paths depending on their expectations of service delivery and their willingness to look after their own needs while travelling<sup>13</sup>, which may exert new pressures on the system over the years to come. Businesses will have to be able to adapt to these changes, and must have the right workforce to meet changing needs.

**Gaps in housing and transportation infrastructure and structural employment issues greatly constrain the ability of the tourism sector to recruit and retain workers.** Tourism operators are struggling to fill positions due to a lack of affordable local housing, as well as poor or limited transportation options available to workers. This highlights the need for further investments into infrastructure development to support worker mobility and retention within the sector. In addition, structural employment issues, particularly in areas where tourism is seasonal and the opportunities for occupational pluralism may be limited, can act to reduce the sector's value proposition for some potential employees by restricting their access to essential benefits like health, dental, disability, and accident insurance.

**Indigenous tourism entrepreneurs and workers are poised to become an increasingly significant part of the tourism sector in Canada.** Indigenous tourism is a rapidly growing market segment, with many small businesses providing a range of Indigenous experiences across the country. This includes authentic cultural experiences, traditional teachings, and Indigenous histories. In 2021, the Indigenous population in Canada reached 1.8 million, making up 5.0 percent of the country's total population and showing a 9.4 percent increase since 2016<sup>14</sup>. This young and growing population represents an important pool of talent for the Indigenous tourism sector, both as employees and as entrepreneurs. Indigenous tourism will serve as an important pathway for reconciliation, an expanding opportunity for meaningful in-community work, a tool for increasing economic sovereignty for Indigenous peoples, and a major contributor to the Canadian tourism sector.

**As the sector adapts to the post-pandemic landscape and new workforce realities, tourism stakeholders are embracing innovation, efficiency, and sustainability.** Post-pandemic, tourism businesses are seeking ways to differentiate themselves in addressing shifting labour force expectations, gaps in workforce skills, and increasingly complex operating conditions. To navigate these difficulties, many industry stakeholders have been shifting their focus towards promoting sustainability practices and initiatives aimed at addressing the environmental and infrastructure challenges that will impact the long-term viability of the sector. Businesses continue to explore ways of doing more with less by adopting leaner approaches and strategies, such as hybrid work models and shared worker (co-employment) arrangements. Some tourism operators have also turned to technology to optimize workflows and improve employee efficiency, such as freeing employees from easily automated tasks, offering new visitor products and services, and streamlining administrative workloads. That said, to fully leverage the benefits of digital transformation, ongoing training and skill development will prove essential to improving productivity.

<sup>13</sup> Tourism HR Canada (2024). Expectations of Tourism Service Quality. HR Insider, February 12, 2024. <https://tourismhr.ca/2024/02/12/expectations-of-tourism-service-quality/>

<sup>14</sup> Tourism HR Canada (2024). *Indigenous Peoples: Profile of Indigenous Tourism Workers*. Adapted from Statistics Canada Census 2021. <https://tourismhr.ca/labour-market-information/tourism-census/>

### 3.3 Recommendations

#### POLICY-FOCUSED RECOMMENDATIONS

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- **Invest in infrastructure development.**  
Policies that focus on building affordable housing and transportation infrastructure and supporting healthcare and education will facilitate greater recruitment, retention, and worker mobility.
- **Incentivize business investments in technology, digitalization, and AI.**  
By adopting digital tools, businesses can optimize workflows, improve employee efficiency, and allow operators to deliver better customer service with smaller teams.
- **Invest in Indigenous tourism development, entrepreneurship, and succession.**  
These investments will drive further development of Indigenous tourism enterprises that offer authentic Indigenous experiences, empower Indigenous operators, foster economic development, support reconciliation, and help to attract and retain Indigenous workers into the sector.

#### RESEARCH-FOCUSED RECOMMENDATIONS

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- **Identify ways in which technology and operational innovation can increase productivity.**  
Two key focuses are optimizing resource allocation at a business level, and increasing overall operational efficiency.
- **Examine the potential implications of anticipated sector changes on future workforce requirements.**  
There is a need to focus on the skills needs in terms of digital transformation, AI adoption, and sustainability measures, and the training required to meet those needs.

#### BUSINESS-FOCUSED RECOMMENDATIONS

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- **Review opportunities for technological solutions to streamline operations and improve productivity.**  
By automating routine tasks, businesses can free up employees to focus on more valuable, customer-facing work. This can lead to improved service delivery and standards.





# The Labour Market

## 4.1 Context

The tourism sector has faced significant labour challenges in recent years. Businesses are grappling with a severe labour shortage stemming from a complex interplay of factors. This labour shortfall is exacerbated by factors such as educational barriers, including credential recognition and limited training opportunities. Many tourism businesses struggle to find qualified and reliable employees. To help address these challenges, businesses have widened job postings, leveraged recruitment agencies, and increased their presence at job fairs. They are also focusing on improving workplace culture and prioritizing employee well-being<sup>15</sup>. Targeted recruitment exercises for equity-deserving groups remain limited, although data shows that efforts to build a diverse workforce have increased since the pandemic, including recruiting older and more culturally diverse candidates.

While foreign workers have become increasingly important to addressing labour force needs, recent immigration policy changes are making it much harder for tourism operators to draw on international talent. A focus on improving retention rates can have substantial financial benefits for businesses, as well changing the narrative of tourism employment as a short-term option only.

The following section will look more closely at workforce challenges and opportunities, including skills gaps, training needs, compensation expectations, recruitment and retention issues, workplace culture, and employee well-being. Recommendations to address these issues as they relate to policy, research, and business practices are offered in section 4.3.



<sup>15</sup> Tourism HR Canada (2023). *Workplace Culture and Compensation: Insights from Operators*.

<https://tourismhr.ca/labour-market-information/reports/workforce-strategy/tourism-sector-compensation-study/>



## 4.2 Discussion

### Workforce Challenges and Opportunities

**The tourism sector must contend with skills mismatches and gaps that arise from the continuously evolving tourism landscape, and will constantly face emerging needs around new worker competencies and job functions.**

These skills mismatches reflect areas where there is a straightforward lack of specific skills, where existing skills are underutilized, and where current skills are outdated<sup>16</sup>. The rapid advancement of digital technology and corresponding changes to job functions are reshaping the job market in favour of highly skilled, educated, and adaptable workers. The sector is particularly facing a shortage of essential future skills such as critical thinking, decision-making, data analytics, project management, and digital literacy. Individuals with lower educational attainment, or who have endured prolonged periods of unemployment, risk of being left behind in the skills marketplace, as skills needs will change during periods of labour market disengagement. Businesses will struggle to find reliable workers with the necessary qualifications, which will contribute to inefficiencies, higher turnover, higher workers' compensation claims, and lower standards of service.

The rapid advancement of digital technology and corresponding changes to job functions are reshaping the job market in favour of highly skilled, educated, and adaptable workers.

**Addressing this growing skills gap will require cost-effective training solutions.**

Tourism operators recognize that effective employee training can have a significant impact on improving employee satisfaction and reducing job turnover, but for many businesses, their capacity to offer this training is constrained by their financial situation<sup>17</sup>. Although recent surveys show that businesses have increased the amount of staff training they deliver when compared to the year prior, less than a third of businesses believe they have the resources to provide extensive training to frontline workers. Internal mentorship and cross-training have been identified as valuable and cost-effective alternatives to more expensive training programs, especially for businesses dealing with increased operational costs, but these also face resource constraints when businesses may be critically understaffed in supervisory and management positions. Stackable micro-training may become an increasingly popular approach in terms of affordability and time constraints.

**There is a discrepancy between employee and employer expectations regarding wages.**

Businesses must shift their perspective on wages from seeing them as an expense to seeing them as an investment in their workforce. Many former tourism workers who left the sector due to non-competitive wages were of the view that businesses could have afforded higher salaries; however, many businesses indicate that they struggle to meet worker wage expectations. While there are mixed views on the impact of wage increases, most tourism operators believe they would not lead to significant gains in productivity. Further, employers estimate that wages would need to increase by 10 percent to 25 percent to effectively address recruitment and retention challenges in difficult-to-fill positions, which is too large an increase for most operators to accommodate.

<sup>16</sup> Tourism HR Canada (2022). *Tourism's Double-Barrelled Labour Challenge: Barriers to Employment and Skills Mismatches*.

<https://tourismhr.ca/labour-market-information/reports/workforce-strategy/tourisms-double-barrelled-labour-challenge-barriers-to-employment-and-skills-mismatches/>

<sup>17</sup> Leger Marketing (2024). *Business Intelligence Survey: Labour Market Information, August–September 2024*. Prepared for Tourism HR Canada.

<https://tourismhr.ca/labour-market-information/reports/workforce-strategy/business-intelligence-survey-report/>

**Compensation packages are a crucial component of a company's value proposition.** While wages may be a difficult sticking point, businesses have other ways to add value to their compensation packages, which do not always incur significant up-front costs. Flexible hours or work arrangements, use of on-site amenities, and other perks and long-term employee benefits can do a lot to signal employer commitment to both job seekers and current employees. Many tourism employers have started to revise components of their compensation packages (increasing wages, increasing benefits, and/or implementing bonus structures, etc.), and there is opportunity for collaboration between local networks of small businesses to pool resources in accessing preferred rates for benefits plans.



**Tourism operators face numerous challenges in employing or recruiting foreign workers.**

Although tourism businesses benefit enormously from international talent, most operators find processing times too long, application processes too complex, and the costs associated with recruiting internationally too big a barrier to overcome<sup>18</sup>. There are also challenges related to foreign credential recognition, both at an institutional level (which credentials are recognized for which purposes) and at a practical level (understanding what a particular credential means in terms of employee skills and experience). A formalized system of skill recognition over formal credentials would facilitate some of this international mobility, as diplomas may not always be easily mapped to a Canadian equivalent.

This approach would be particularly beneficial for sectors like tourism, which require diverse skills sets to meet a range of occupation needs. While the use of foreign worker/immigration programs to recruit tourism workers has increased in Canada, many tourism operators report they have not utilized these programs at all. Encouraging non-participating employers to use foreign worker/immigration programs would require providing them with more information on the programs as well as reducing some of the barriers to participation.

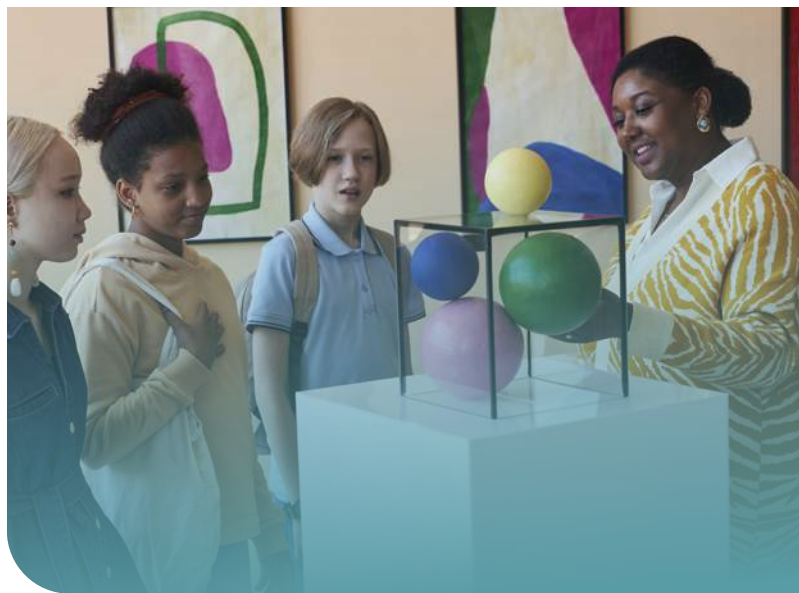
However, changing political realities and economic landscapes mean that international recruitment is unlikely to be a stable long-term solution to staffing problems in the sector. All tourism employers will need to understand the potential impact on the sector of the overall reduction in immigration levels and changes to the rules for the temporary worker program, as announced by the Government of Canada in 2024<sup>19</sup>. Renewed efforts to recruit international workers already in Canada – particularly refugees, asylum seekers, and displaced persons – may be a more productive approach, but may also need higher investment in job-readiness training before they can be attached to employment.

<sup>18</sup> The Conference Board of Canada (2024). *The Future of Canada's Tourism Sector: Labour Demand and Supply Analysis*. Prepared for Tourism HR Canada. <https://tourismhr.ca/labour-market-information/reports/labour-market-projections/labour-demand-and-supply-analysis/>

<sup>19</sup> IRCC. (2024). *2024 Annual Report to Parliament on Immigration*. <https://www.canada.ca/en/immigration-refugees-citizenship/corporate/publications-manuals/annual-report-parliament-immigration-2024.html>

**Diversity and inclusion are important factors in supporting employee growth and development.**

Operators who prioritize inclusion and diversity can help employees to succeed in the workplace. For example, new Canadians often thrive in workplaces that celebrate cultural diversity and provide clear communication about Canadian HR practices. While the literature is clear on the importance of reviewing internal practices to foster a diverse workforce, few businesses indicate using targeted recruitment strategies to attract equity-deserving groups. Organizations such as Tourism HR Canada and the Indigenous Tourism Association of Canada (ITAC) are actively working to support workforce inclusion, aiming to increase Indigenous participation in the sector through initiatives like the *Original Original* Accreditation Program and targeted job boards. Other groups that are under-represented in the workforce, and whose talents and skills may be overlooked, include people with disabilities, members of the LGBTQ+ community, and mature workers. Businesses that actively invest in a diverse workplace culture will see gains in terms of employee retention, and may also develop new markets for their services and products.



**A focus on workplace culture and employee well-being are crucial elements to addressing labour shortages and supporting employee retention.**

Retention rates are correlated to workplace culture and to employee well-being. This includes workplaces that lead to high stress levels or where employees feel unsafe, undervalued, or unwelcome<sup>20</sup>. Many businesses have implemented strategies to improve the working conditions for workers and help address labour shortages. Examples include flexible work arrangements, work-life balance initiatives, and streamlined onboarding processes. During the pandemic, some tourism operators would conduct wellness checks, deliver care packages, and provide support in accessing government assistance programs for employees they could not retain, in hopes of maintaining relationships and re-hiring down the road. While the adoption of these types of strategies has varied over time, survey data suggests that approximately 50 percent of tourism businesses have increasingly been prioritizing employee well-being<sup>21</sup>, which will become increasingly expected from job seekers. Working to improve workplace mental health and psychological safety will become increasingly imperative for business success.

<sup>20</sup> Tourism HR Canada (2024). *Creating Mentally Healthy Workplaces*. Research conducted by Michael DeVenney, WorkInsights.

<https://tourismhr.ca/labour-market-information/reports/workforce-strategy/creating-mentally-healthy-workplaces/>

<sup>21</sup> Ibid.

## 4.3 Recommendations

### POLICY-FOCUSED RECOMMENDATIONS

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- **Reform immigration regulations, and develop a *tourism-specific* immigration stream.**

The focus should be on simplifying and streamlining existing immigration programs and policies that align with the recent changes to government policies related to international workers. Consideration should be given to establishing a dedicated immigration stream specifically tailored to the tourism sector, which faces many structural challenges related to seasonality and geography.

### RESEARCH-FOCUSED RECOMMENDATIONS

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- **Develop a framework for improved foreign credential recognition.**

The framework should outline pathways to streamlining visa processes and work permit regulations to better recognize the training and skills that internationally trained workers bring with them.

- **Develop a better understanding of the barriers facing Indigenous Canadians' participation in tourism.**

With Indigenous people representing the youngest and fastest-growing segment of the population, and with renewed international interest in Indigenous tourism, there is much work to be done in increasing engagement with tourism in Indigenous communities. While some of the challenges facing Indigenous tourism businesses are the same as those facing small operators across the country, there are also unique barriers – structural, political, and infrastructure – that must be better understood before practical policy and programming can be developed.

### BUSINESS-FOCUSED RECOMMENDATIONS

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- **Foster positive workplace cultures, highlight the unique value proposition of tourism, and promote career paths for employees.**

To support recruitment and retention efforts, businesses should emphasize the benefits and rewards of working in the tourism sector, focus on creating a supportive and inclusive work environment that values employee well-being, and showcase the various career opportunities within the sector and within their organization.

- **Shift to a competency-based model for evaluation and job management.**

This will facilitate the recognition of transferrable skills across employers, industries, and training backgrounds, and can help businesses identify the most pressing training needs across their operations. Closer integration of competencies and skills within formal educational institutions will also help to bring this approach into mainstream business practices.





# Future Considerations

## 5.1 Context

The findings from this three-year project have identified a number of other challenges and issues that should be addressed in supporting the development of the sector going forward. The Employment Insurance (EI) system continues to be under scrutiny, with calls for tailored support for specific workers, industries, regions, and businesses. There are also calls to establish a living wage to strengthen the stability of the sector's workforce. To further advance workforce development, there is a growing need for businesses to prioritize and embrace the use of digital tools and technologies as well as strengthen their partnerships and collaborations. Lastly, a competency-based approach to workforce management can better enable tourism stakeholders to seize new growth opportunities and adapt swiftly to evolving sector needs. The following discussion explores these challenges and issues. Section 5.3 will provide recommendations for policy, research, and business practices to help address these challenges.

There is a growing need for businesses to prioritize and embrace the use of digital tools and technologies as well as strengthen their partnerships and collaborations.

## 5.2 Discussion

### Future Needs

**There is a need to restructure the Employment Insurance (EI) system.** EI is financed through contributions from both employees and employers, with the government having ceased its contributions in 1990. Employers contribute at a rate that is 1.4 times that of employees. Contributions continue until an individual's earnings reach the maximum insurable earnings (MIE) threshold, which was set at \$63,200 for 2024<sup>22</sup>. In industries such as accommodations and food and beverage services, where the average wage is below \$20 per hour and many employees work part-time hours, the MIE is rarely met, leading to employer contributions being made on the entire payroll. There are ongoing calls to restructure the EI program, which would first require a review of how well the EI system functions for specific types of workers and businesses (e.g., seasonal workers, part-time workers, multiple job holders, and temporary foreign workers). Consideration could also be given to introducing benefits for self-employed individuals as this comprises a number of tourism operators.

<sup>22</sup> CRA (2024). *EI premium rates and maximum*. <https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/payroll/payroll-deductions-contributions/employment-insurance-ei/ei-premium-rates-maximums.html>



**The adoption of a living wage may help to stabilize the sector's workforce.** In 2022, the average wage rate in the tourism sector was \$22.22 per hour, although this aggregate average masks significant variation across the five tourism industries and different job types (i.e., this average includes frontline workers as well as senior managers). Employees in the transportation industry tend to be paid the higher average hourly wages, while those working in the food and beverage services industry are paid at the lower end of the scale, although there are differences in required training and qualifications, in job characteristics, and in union participation that complicate these kinds of comparisons<sup>23</sup>. Overall, wage growth has lagged behind inflation, adding financial strain on individuals and households. A living wage applied at the lower end of the pay scale may better enable workers to afford basic necessities like food, housing, and healthcare, which would act to stabilize the tourism workforce in the long run.

**As the rate of technology development and innovation accelerates, there is a growing need for businesses to prioritize and embrace the use of digital tools and technologies.** Digitalization of tourism services is moving ahead at a rapid pace, characterized by a growing reliance on automation, contactless options, virtual experiences, and real-time information throughout the customer journey. In order to thrive in the digital age, tourism organizations must adapt and shift focus in three key areas:

1. Operationally: leveraging technologies like cloud computing, big data, and artificial intelligence to improve operations
2. Culturally: promoting digital literacy and upskilling as well as encouraging cross-functional collaboration
3. Customer experience enhancements: implementing digital tools such as apps and self-service options

**The seasonal nature of many tourism enterprises constrains the ability of employers to attract and retain workers from season to season.** These employers face significant challenges in competing for workers against those who are able to offer year-round employment, higher annual wages, and access to benefits plans. The seasonal nature of some tourism positions can also pose challenges related to skills development. One strategy that is being explored to mitigate these pressures is seasonal occupational pluralism<sup>24</sup>: finding ways to help seasonal workers access different jobs throughout the year to maximize annual income. Such strategies could involve resource sharing or seasonal job parings, which would provide full-time, year-round work by splitting the contract between jobs in two companies in complementary periods. This approach will require concerted effort by employers across multiple sectors and industries to facilitate formal co-employment arrangements, but this is a promising direction for the tourism sector, particularly in rural areas where the pool of workers is small. Cooperation between businesses within this framework can ease the burdens on individual businesses, by splitting costs while offering greater stability to employees.



<sup>23</sup> Leger Marketing (2023). 2023 Canadian Tourism Sector Compensation Study. Prepared for Tourism HR Canada.

<https://tourismhr.ca/labour-market-information/reports/workforce-strategy/tourism-sector-compensation-study/>

<sup>24</sup> Higher Education Strategy Associates (2023). *Gauging the Potential of Occupational Pluralism in the Rural Maritimes*. Prepared for the Future Skills Centre. <https://fsc-ccf.ca/wp-content/uploads/2023/10/Gauging-the-Potential-of-Occupational-Pluralism-in-the-Rural-Maritimes.pdf>



**Working in partnership and collaboration with other employers can help tourism businesses better address their recruitment, development and retention challenges.**

Businesses can work together in attracting workers into the industry. Tourism businesses have learned that it pays to be friends with their competition, as it can open up new possibilities such as joint recruitment efforts or the introduction of improved employee perks and benefits for the sector. External partnerships with industry associations or government services can also provide some much needed training for staff. By working with post-secondary institutions and other training providers, employers may be better able to ensure that the curriculum aligns with evolving market demands. Finally, engaging local enterprises such as community-based employment offices has proven to be an effective strategy for businesses that continue to face challenges with local labour shortages.

**A competency-based approach to workforce development can empower tourism operators to seize growth opportunities and adapt more quickly to evolving sector needs.**

Tourism HR Canada's *Workforce Management Engine*<sup>25</sup> was developed to address current and future challenges in the sector and help employers build a more diverse, inclusive, and resilient workforce. The library of competencies reflects the skills and knowledge required to succeed in the sector and can be used in assessing the competencies required for various tourism occupations. Given the pace of change in the sector, it is important to keep these types of tools updated to ensure they remain relevant and effective in address evolving industry needs, and in recognizing and promoting opportunities for lateral movement within the sector.

<sup>25</sup> Tourism HR Canada (2024). *Workforce Management Engine*. <https://tourismhr.ca/programs-and-services/workforce-management-engine-the-competency-framework-for-tourism/>

## 5.3 Recommendations

### POLICY-FOCUSED RECOMMENDATIONS

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- **Review the Employment Insurance (EI) system.**

The heavy reliance on part-time workers, particularly those that operate on a seasonal basis, can impose a high financial burden on many tourism operators. Existing EI policies should be reviewed to see if the formula may be tweaked to better support these small employers.

- **Adopt living wage policies for low-wage workers.**

Minimum wage legislation has done a lot to protect workers' basic rights, but a system that reflects regional disparities in cost-of-living would make tourism jobs more attractive, and would facilitate the conversion of frontline workers into career-track employees.

- **Incentivize business investment in technology.**

The tourism sector is rapidly digitizing, but businesses will need support to make investments in updated technology and digital platforms to help enhance customer experiences, manage workers, and address labour shortages.

### RESEARCH-FOCUSED RECOMMENDATIONS

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- **Identify anticipated skills gaps and future trends, and develop appropriate training frameworks.**

A comprehensive assessment of future skills needs within the tourism sector should be completed, with a focus on emerging trends such as digitalization, eco/sustainable skills, micro-credentials and social employability.

- **Address the challenges associated with seasonal employment and workforce optimization.**

Occupational pluralism, resource sharing, and seasonal job pairing/co-employment are examples of strategies showing promise in mitigating labour challenges. Such strategies can help operators access a larger pool of talent and optimize labour resources. However, developing recommendations and policies for the roll-out of such practices will need further research.

- **Keep competency frameworks up to date.**

Competency frameworks are effective tools to support the professionalization of tourism occupations. Keeping these tools updated to reflect changing skills and employment expectations will support future workforce development, particularly in the context of formal co-employment and other emerging employment trends.

### BUSINESS-FOCUSED RECOMMENDATIONS

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- **Promote better collaboration across local tourism ecosystems.**

Businesses that work together to address recruitment, development, and retention challenges will likely fare better than those that continue to work in silos. Pooling resources for training, to access better benefit plans, and to optimize the local workforce will stabilize local labour conditions. Collaborating with industry associations, with non-profit organizations focused on employment or newcomer settlement, and with post-secondary training institutions will also help cement links between education and industry.



# Closing Thoughts

The past three years have been an interesting period for the tourism sector. Restrictions related to the COVID-19 pandemic were eased and then lifted, and demand for tourism has rebounded faster than businesses have been able to meet this demand. Workforce challenges have come to the forefront, and the Labour Market Intelligence (LMI) collected over the past three years is a rich source for recommendations, along the three axes of policy, research, and business practice.

Tourism is facing an uphill journey on the labour front. The sector's reputation as a place of employment hampers recruitment and retention efforts, with most Canadians seeing tourism as a source for temporary or entry-level work only. The narrative of working in tourism needs to change, to emphasize the flexibility, the lifestyle benefits, and the career opportunities that abound. Perception and sentiment studies have shown that newcomers to Canada tend to have a more positive view on tourism work than those who were born in Canada, but recent immigration policy changes are making it harder for businesses to recruit internationally. Colleges and universities across the country are also facing challenges in recruiting overseas students, which may threaten the ability of some programs to continue to offer training in tourism and hospitality, and which will have long-term consequences for the tourism workforce in Canada. The demographics of the Canadian workforce are shifting, with an aging population, declining birth rate, and immigration likely to be curbed in the coming years. As smaller towns and rural areas turn to tourism to sustain themselves, the large-scale movement of people into large metropolitan areas will pose additional problems for businesses: increased pressure from other sectors and industries will strain an already shrinking pool of talent, and competition for workers will be fierce.



But there is reason for optimism, in spite of these very real challenges. The COVID-19 pandemic was a catalyst for change, prompting businesses, associations, and communities to think differently about how they work together, and this moment of disruption will continue to have ripples across local economies. The sector is well-positioned to capitalize on this momentum for innovation. Businesses have shown remarkable adaptability over the past three years, and will benefit enormously from investment in digital tools to facilitate their day-to-day operations. With the right mindset and an appropriately skilled workforce, they will be able to do more with a smaller staff. And with an openness to new ways of doing things – of adopting a shared workforce approach with other seasonal businesses and industries, and exploring options for extending products and services into the shoulder seasons – the opportunities for growth are considerable. It will take a coordinated all-of-sector approach to meet these challenges, but the pandemic demonstrated how ready the sector is to work together on these issues. With the right resources and leadership, we will chart a course towards a sustainable and limitless future. The recommendations to start us on this path have been developed across this report, and are summarized below.



# Summary of Recommendations

## POLICY-FOCUSED RECOMMENDATIONS

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- Match investment in workforce and career development with that in generating increased demand for tourism.
- Invest in infrastructure development.
- Incentivize business investment in technology, digitalization, and AI.
- Invest in Indigenous tourism development, entrepreneurship, and succession.
- Reform immigration regulations, and develop a tourism-specific immigration stream.
- Review the EI system.
- Adopt living wage policies for low-wage workers.

## RESEARCH-FOCUSED RECOMMENDATIONS

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- Develop a more comprehensive understanding of worker motivations.
- Better understand the impact that demographic shifts in the population will have on the future workforce.
- Identify ways in which technology and operational innovation can increase productivity.
- Examine the potential implications of anticipated sector changes on future workforce requirements, and develop appropriate training frameworks.
- Develop a framework for improved foreign credential recognition.
- Develop a better understanding of the barriers facing Indigenous Canadians' participation in tourism.
- Identify anticipated skills gaps and future trends, and develop appropriate training frameworks.
- Address the challenges associated with seasonal employment and workforce optimization.
- Keep competency frameworks up to date.

## BUSINESS-FOCUSED RECOMMENDATIONS

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- Adopt different tactics and strategies to adapt to an evolving workforce landscape.
- Review opportunities for technological solutions to streamline operations and improve productivity.
- Foster positive workplace cultures, highlight the unique value proposition of tourism, and promote career paths for employees.
- Shift to a competency-based model for evaluation and job management.
- Promote better collaboration across local tourism ecosystems.



## What's Next for Tourism HR Canada?

The following table outlines some of the key priorities for Tourism HR Canada in the coming years. These priorities and areas of focus will be important for the long-term health and sustainability of the sector, and will draw on a network of partners and stakeholders across the tourism sector.

Priorities	Focus Areas/Key Actions
1. Technology, Digitalization, AI	<p><b>Skills Gap:</b></p> <ul style="list-style-type: none"> <li>Mapping out occupations and industries most likely to be impacted by AI</li> <li>Identifying the skills gaps/deficits that will emerge</li> <li>Identifying existing generalized training for AI-assisted work</li> <li>Developing training to meet the specific needs of the sector</li> </ul> <p><b>Productivity:</b></p> <ul style="list-style-type: none"> <li>Monitoring the impacts of technology/AI on productivity across tourism</li> <li>Developing strategies to optimize workforce engagement, attraction, and retention</li> </ul> <p><b>Partnerships:</b></p> <ul style="list-style-type: none"> <li>Focusing on working with education partners to develop tourism-focused AI skills early on</li> </ul>
2. Sustainability	<p><b>Environmental Impacts:</b></p> <ul style="list-style-type: none"> <li>Reviewing 'green' skills needed to meet visitors' new expectations*</li> <li>Focusing on sustainability as a recruitment tool for young people who want to make a difference in their work</li> <li>Examining climate change impacts on the tourism workforce</li> </ul> <p><b>Diversity, Equity, Inclusion (DEI) and Accessibility:</b></p> <ul style="list-style-type: none"> <li>Introducing new perspectives, products, services, and markets related to DEI and accessibility†</li> </ul> <p><b>Supporting Communities:</b></p> <ul style="list-style-type: none"> <li>Focusing on infrastructure to support tourism and local residents</li> <li>Managing local sentiment towards tourism</li> <li>Ensuring that the local economy benefits directly from visitor spending</li> </ul>

\* Green/eco-tourism is likely to drive future consumer decisions, and meeting those demands will become necessary for businesses to thrive.

† Can be beneficial for businesses by providing access to a wider labour pool, for marginalized people by offering good jobs in their communities, and for the sector as a whole.

Priorities	Focus Areas/Key Actions
3. Sector Cohesion	<p><b>Reducing Duplication:</b></p> <ul style="list-style-type: none"> <li>Reducing duplication in research, training/development, business support tools/resources, and competition for funding</li> </ul> <p><b>Collaborative Mindset:</b></p> <ul style="list-style-type: none"> <li>Collaborating on training and workforce development</li> <li>Encouraging specialization across organizations and better data sharing</li> <li>Aligning on methodologies/approaches for comparability</li> </ul> <p><b>Sharing Data-driven Insights:</b></p> <ul style="list-style-type: none"> <li>Providing data-driven recommendations to inform policy and advocacy work, with a renewed focus (and urgency) around the changing nature of the workforce and labour market and increasing complexity of the interconnected systems in tourism</li> </ul>
4. Tourism Definitions	<p><b>Definitions of Tourism:</b></p> <ul style="list-style-type: none"> <li>Examining the Tourism Satellite Account, identifying the dimensions of tourism that are omitted</li> <li>Coming to agreements on definitions of tourism in specific domains (e.g., workforce challenges vs. economic impacts) to reduce data and statistical incoherence in public and political messaging</li> <li>Benchmarking tourism better against other domestic sectors and against tourism in other countries</li> <li>Moving beyond the COVID-19 recovery narrative, and orienting to the new conditions and realities</li> </ul>
5. Brand Imaging	<p><b>Image and Credibility:</b></p> <ul style="list-style-type: none"> <li>Addressing the sector's reputational shortcomings as a place of employment</li> <li>Developing tools to enable businesses to evolve their HR practices, particularly in light of a smaller workforce and increasing visitor demand</li> <li>Continuing to monitor compensation practices and develop strategies for shifting towards total compensation/values culture</li> <li>Collaborating closely with national organizations (e.g., the Tourism Industry Association of Canada, the Hotel Association of Canada, Restaurants Canada, the Indigenous Tourism Association of Canada, Destination Canada) to align messaging and bring coherence to advocacy and marketing efforts</li> </ul>

The pandemic, while highly disruptive, presented the tourism sector with a unique opportunity to innovate and adapt to a changing world. This is the time for radically reimagining what working in tourism means and to change the narrative to frame the sector as a force for social wealth and well-being in Canadian communities.

The research conducted by Tourism HR Canada over the past three years has highlighted a number of areas where targeted support and strategic planning can elevate the tourism sector as a desired place of employment and as one of the most important sectors for national employment.

# Appendix A

All data, dashboards, and reports can be accessed from the Tourism HR Canada website: [TourismHR.ca](https://TourismHR.ca)

## Data and dashboards

- Annual Labour Force Survey
- Tourism Employment Tracker
- Tourism Human Resources Module
- Rapid reSearch (link to *Emerit* platform for access)
- Monthly labour force reports published via *Tourism HR Insider* newsletter

## 2021 census reports

- National summary
- Demographic summaries
  - Immigrants and non-permanent residents
  - Indigenous peoples
  - Mature workers
  - Youth workers
- Industry summaries
  - Accommodations
  - Food and beverage services
  - Recreation and entertainment
  - Transportation
  - Travel services

## State of the industry reports

- 2023 interim snapshots
  - National
  - British Columbia
  - Alberta
  - Saskatchewan
  - Manitoba
  - Ontario
  - Quebec
  - New Brunswick
  - Nova Scotia
  - Prince Edward Island
  - Newfoundland and Labrador
- 2025 State of the Tourism Sector final report

## Business intelligence survey reports

- September 2022
- January 2023
- April 2023
- September 2023
- September 2024

## **Perceptions of tourism as a place of employment**

- Autumn 2022
- Autumn 2023
- Autumn 2024

## **Labour supply and demand**

- The Future of Canada's Tourism Sector: Labour Demand and Supply Analysis (2024)
- Projection factsheets (2023)
  - Accommodations
  - Food and beverage services
  - Recreation and entertainment
  - Transportation
  - Travel services

## **Compensation culture infographics**

- Worker Archetypes
- Blended Workforce
- Skills, Not Jobs
- Retaining Workers
- Psychological Safety at Work

## **Service quality perceptions**

- Canadian Travel Consumer Poll report
- Global Traveller Insights report

## **Standalone reports**

- Creating Mentally Healthy Workplaces
- Canada's Double-Barrelled Labour Challenge: Barriers to Employment and Skills Mismatches



Prepared by