



TIAO

2021-2022

CHRIS BLOORE – PRESIDENT & CEO

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WHO IS TIAO?



A MEMBER BASED ORGANIZATION WHOSE PRIMARY MANDATE IS TO BE THE LEADING AUTHORITY ON BUSINESS AND POLICY ISSUES AFFECTING THE ONTARIO TOURISM INDUSTRY.



WE ADVOCATE WITH A UNIFIED VOICE ON BEHALF OF THE DIVERSE TOURISM INDUSTRY IN ONTARIO TO POSITION THE INDUSTRY AS A POWERFUL AND RECOGNIZED ECONOMIC DRIVER.

Economic Impact of COVID-19 on Tourism

▶ REVENUE LOSSES

- ▶ Revenue losses peaked at 93%, with 6 in 10 operators reporting +90% revenue losses
- ▶ Significant loss of cash flow was the number one risk to businesses (78%)

▶ JOB LOSSES

- ▶ Ontario's tourism industry lost 141,000 jobs at the height of the pandemic
- ▶ More than 188,000 tourism workers were laid off

▶ DEBT

- ▶ 7 in 10 businesses had taken on debt to remain afloat and estimated it would take at least 2 years to resolve

▶ INDUSTRY ECONOMIC IMPACT

- ▶ To date, tourism has lost more than \$18 billion in revenue
- ▶ 77% of tourism businesses would have shut down without government support

TIAO Policy Wins

Ontario Tourism
Recovery Program

Ontario Travel and
Tourism Small
Business Support
Grant

Temporary
Changes to ESA
legislation

Improving Rural
Access to High-
speed internet

Ontario taking
steps to Protect
Vulnerable Workers

Permanent Alcohol
Wholesale Discount
at LCBO

Canada
Emergency Rent
Subsidy (CERS)

Canada
Emergency Wage
Subsidy (CEWS)

Tourism and
Hospitality
Recovery Program
(THRP)

Ontario Business
Costs Rebate
Program

Canada
Emergency
Business Account
(CEBA)

Regional Relief and
Recovery Program
(RRRF)

Temporary ESA
Regulation on
Termination and
Severance Payouts

Unpaid IDEL
Extension

Proof of
Vaccination Opt-in

Ontario Staycation
Tax Credit

Vaccine Certificate
Exemption for
International Visitors
and First Nations
Communities

Ontario COVID-19
Small Business Relief
Grant

Current Challenges

▶ LABOUR CRISIS

- ▶ Recruitment & retention the number 1 concern of tourism operators
- ▶ 2020-2025: Ontario projected to lose \$34.7B in tax revenues from tourism & hospitality due to labour gaps

▶ UNEVEN RECOVERY

- ▶ Land border crossings are still only half (50.8%) of normal travel volumes, impacting rubber tire tourism markets in northern & southern Ontario
- ▶ As of summer 2022, US arrivals at the land border were only at 25-33% of what they were pre-COVID
 - ▶ Resource-based tourism clientele is 60-100% US visitor: 2022 YTD revenue losses estimated at \$100 million (NOTO)

▶ SOARING DEBT

- ▶ 20% of operators are now \$100,000 in debt
- ▶ Resource-based tourism operators have accumulated on avg. \$187,000 in debt

Federal Tourism Growth Strategy

- ▶ TIAO's submission focus: Spurring long-term growth, investment attraction, and destination development in tourism by addressing economic, labour, infrastructure, and sustainability barriers
- ▶ Key asks:
 - ▶ Debt relief measures
 - ▶ Tax incentives supporting return of M&C, events, live entertainment
 - ▶ Tourism workforce strategy
 - ▶ Including immigration reform, future talent investments, career awareness
 - ▶ Building more affordable housing & investing in bus & passenger rail links
 - ▶ Climate change prevention & mitigation supports for at-risk operators
 - ▶ Permanent personal income tax credits incentivizing domestic travel
 - ▶ Strategies to ensure seamless inbound travel for US visitors

Projects

▶ **A Three Fires Collaborative Quest**

- ▶ Program is designed to encourage growth within the province's tourism workforce by supporting Indigenous employees find employment

▶ **Discover Ability Network**

- ▶ The Discover Ability Network platform connects those that identify as having a disability with employers that are actively looking to hire

▶ **Elevating Ontario's Experiences**

- ▶ Provide individual tourism operators with customized strategies and tangible next steps to build tourism capacity in the growth areas of Culinary and winter/shoulder experiences, via workshops and one-on-one coaching sessions.

▶ **Advancing Sustainable Tourism in Ontario**

- ▶ GOAL: to make Ontario the most sustainable province in Canada, by certifying each RTO in Sustainable Tourism with GreenStep Solutions.

AMO 2022

- Tourism Delegation: Destination Northern Ontario, Indigenous Tourism Ontario, OTEC, Boating Ontario, OMCA, Camping in Ontario, Smart Serve, RTO9, Kingston Accommodation Partners, and Blue Mountain Village Association.

Key AMO asks included:

- ▶ Debt relief
- ▶ action on commercial insurance
- ▶ implementing a tourism workforce strategy
- ▶ new tax incentives and partnerships to spur tourism growth
- ▶ creating regional and localized solutions to the affordable housing crisis
- ▶ continued transportation and infrastructure upgrades
- ▶ climate change prevention and recovery supports
- ▶ long-term strategic investments to support the rebuild, growth, and resilience of our industry across tourism sectors and regions

TIAO & OCC Roundtables

- ▶ Roundtable #1: Labour
 - ▶ Hon. Monte McNaughton, Minister of Labour, Immigration, Training and Skills Development
- ▶ Roundtable #2: Tourism
 - ▶ Hon. Neil Lumsden, Minister of Tourism, Culture and Sport



What are we currently working on?

- ▶ **State of the Industry Report**

- ▶ Strategy for growth, investment, and stability
- ▶ Four main themes: Economic, Labour, Infrastructure, and the Future of Tourism
- ▶ FALL 2022

- ▶ Diversity, Equity, and Inclusion

- ▶ Safe Travels Stamp

- ▶ Three Fires Collaborative Quest Program

- ▶ A program designed to fill critical gaps within the industry and encourage recovery and growth of the province's tourism workforce by bringing awareness of opportunities to potential Indigenous employees.

Challenges Ahead

- ▶ To rebuild the economic impact of the tourism industry, remain domestically and globally competitive, and enable our businesses to grow innovative made-in-Ontario experiences, we require the continued support and collaboration of the Government of Ontario.
- ▶ Key issues:
 - ▶ Debt relief
 - ▶ Supporting the return of events, meetings, and conventions
 - ▶ Red tape
 - ▶ How to promote tourism as a career
 - ▶ Lack of transportation infrastructure, affordable housing, and broadband internet
 - ▶ Climate change