

Ontario Colleges Survey

Evaluating the Impact of Recent
Policy Change on Culinary, Tourism,
and Hospitality Programming

A joint report by:
Tourism Industry
Association of Ontario and
Ontario Restaurant Hotel &
Motel Association



EXECUTIVE SUMMARY

This report is based on a recent survey of Ontario colleges, conducted by Tourism Industry Association of Ontario (TIAO) and Ontario Restaurant, Hotel, & Motel Association (ORHMA). Results of the survey point to a convergence of pressures impacting the viability of culinary, tourism, and hospitality (CTH) programming in Ontario, including the widespread closure or suspension of local programs, a significant decline in domestic and international enrolment, and recruitment challenges driven by perception rather than employability. The report concludes with several recommendations aimed at stabilizing culinary, tourism, and hospitality programming and reinforcing the talent pipeline for tourism in Ontario.

INTRODUCTION

Ontario's tourism industry is poised for growth. While global trade tensions challenge manufacturing and resource sectors, tourism businesses continue to see sustained demand driven by strong domestic travel, favourable currency conditions, and renewed interest from aligned international markets – bolstered by global events like the FIFA World Cup. Provincial policies like the Destination Niagara Strategy have also identified tourism as a priority sector, highlighting the industry's value as an economic engine within the province.

The new *Forward Motion Strategic Playbook for Ontario's Tourism Industry* charts an ambitious and achievable path forward: growing visitor spending by 4% annually to reach \$38.1 billion by 2030, supporting more than 780,000 jobs across the province.

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Against this backdrop, the stability of Ontario's tourism talent pipeline has become increasingly important not only to employers, but to the province's broader economic competitiveness and regional development objectives. Yet recent data suggests that operators are facing persistent workforce challenges, with over half of accommodation and food service businesses in Canada identifying labour as a business obstacle (Business Data Lab, 2026). Labour challenges are especially pronounced in rural and resort communities, with two-thirds (64%) of rural hotels saying they experienced a workforce shortage in peak season last year (Hotels Canada, 2026). These challenges have been exacerbated by changes to federal immigration policy, which have significantly reduced the number of international students entering culinary, tourism, and hospitality programs in Ontario (Statistics Canada, 2026).¹

¹ Since 2023-24, the number of full-time international students in Ontario has declined by over 100,000.

To better understand the impact of these recent changes, and to identify opportunities for strengthening the tourism workforce pipeline, the Tourism Industry Association of Ontario (TIAO), in collaboration with Ontario Restaurant, Hotel, and Motel Association (ORHMA), conducted a survey of Ontario colleges in April and May of 2026. This survey followed the Convening Colleges Meeting held on March 27, 2026, in partnership with ORHMA, several Ontario colleges, and Ontario Ministries of Education, Colleges, Universities, and Research Excellence, and Tourism, Culture, and Gaming. The survey built on themes identified at this meeting, including concerns pertaining to enrolment, work-integrated learning, and program viability. The survey received responses from approximately 50% of Ontario's CTH schools (n=12).

Survey findings suggest Ontario's culinary, tourism, and hospitality education ecosystem is undergoing a significant structural contraction, including a 97% decline in international enrolment that is having spillover effects on program viability and, by extension, domestic enrolment. The implications of this structural change extend beyond post-secondary education into workforce development, tourism competitiveness, regional economic growth, and sector resilience.

97%
decline
in international
enrolment

Survey findings also point to a convergence of pressures, including:

- Substantial reductions in program availability across the province
- Disruption tied to immigration and post-graduate work permit policy changes
- High-cost applied program delivery models under financial strain
- Domestic recruitment challenges driven by perception rather than employability
- Inconsistent institutional adaptation and innovation
- Underdeveloped industry integration

At the same time, respondents indicate that culinary, tourism, and hospitality programs continue to deliver strong employment outcomes and remain strategically important to Ontario's tourism economy. In other words, there is a disconnect between perceptions of tourism careers and the strong employment outcomes identified through the survey. This suggests that the issue is not a reduction in sector relevance, but rather a destabilization of the systems that support talent recruitment and development. The report therefore concludes with several recommendations aimed at stabilizing, supporting, and growing the tourism workforce.



THEME #1:

Ontario's Tourism Workforce Training Ecosystem Has Contracted Significantly

Survey responses indicate a substantial reduction in CTH programming since 2024. These closures and suspensions span culinary, tourism, and hospitality and include introductory programs, management programs, and certification programs alike. Importantly, reported closures and suspensions include many programs that are identified as 'in-demand' on Ontario's 'My Career Journey' portal, such as: Restaurant and food service management; Food service supervisors; Accommodation, travel, tourism and related services supervisors; and Accommodation service managers. The breadth of affected programming indicates systemic cuts rather than isolated program rationalization.

The impact of this restructuring is being felt province-wide. Impacted colleges range from urban centres to rural and northern communities, and include tourism-dependent communities like Niagara, South Georgian Bay, Ottawa, and more. This suggests system-wide pressures rather than localized institutional challenges.

The loss of programming in rural and northern areas is especially concerning insofar as tourism operators in these communities are uniquely dependent on such programs for workforce development.



Closures in these markets carry disproportionate risk insofar as they often have:



Fewer nearby institutions



Smaller labour pools



Reduced workforce mobility



Limited alternate training pathways

While a closure in an urban centre may reduce options, a closure in a rural or northern community may effectively eliminate local access to skilled labour. This creates heightened risk for operators and may limit future growth and investment.

THEME #2:

Declining International Enrolment is Undermining Domestic Access

Beneath program closures and suspensions is an overwhelming decline in international enrolment. Colleges that completed the survey reported a 97% decline in overall international enrolment, from 12,201 in 2024 to just 431 for 2026. This dramatic decline reflects recent changes to immigration policy and the Post-Graduate Work Permit, with federal policy change identified as a key viability pressure by two-thirds of respondents. Several respondents noted that demand has dropped off because there are no viable pathways to residency with their diploma programs, meaning that potentially aligned students are no longer entering the tourism talent pipeline. As discussed in more detail below, this highlights the need to strengthen remaining immigration pathways like the Ontario Immigrant Nominee Program (OINP) to ensure labour market needs in tourism are considered.

97% decline in international enrolment
12,201 → **431**
 in 2024 in 2026

54% decline in domestic enrolment
4,374 → **2,012**
 in 2024 in 2026

This anticipated decline in international enrolment appears to be having a secondary impact on domestic enrolment, likely due to program closures and suspensions. Respondents report a 54% decline in domestic enrolment, from 4,374 in 2024 to 2,012 for 2026. This suggests that international enrolment played a significant role in CTH programs, and that rapid policy changes are having a spillover effect on domestic labour pathways.

These results also call into question the idea that closures and suspensions are being driven by a lack of domestic interest. Rather, reduced international enrolment may be undermining the operating model that supported broader program delivery. When asked what outcomes more stabilization funding could support, for instance, 90% of respondents said more funding would support domestic recruitment.

90%

of respondents said more funding would support domestic recruitment

THEME #3:

Barriers to Domestic Recruitment are Perception-Driven

To the extent that barriers to domestic recruitment exist, they are seen by respondents as largely perception-driven rather than tied to employment outcomes. When asked to identify top barriers to domestic recruitment, for instance, the top barriers identified were teacher awareness/perception, student perception of wages, and counsellor awareness/perception (Figure 1).

These results suggest that tourism's image challenge is beginning upstream, driven by weak awareness in secondary schools, misconceptions among teachers and counsellors, and parental bias. Conversely, respondents noted success in driving recruitment through high school outreach, experiential exposure, campus demonstrations, hands-on programming, and direct student engagement.

Encouragingly, results also suggest that employment outcomes for students in CTH programming remain strong. Institutions estimate graduate employment **within six months** as:

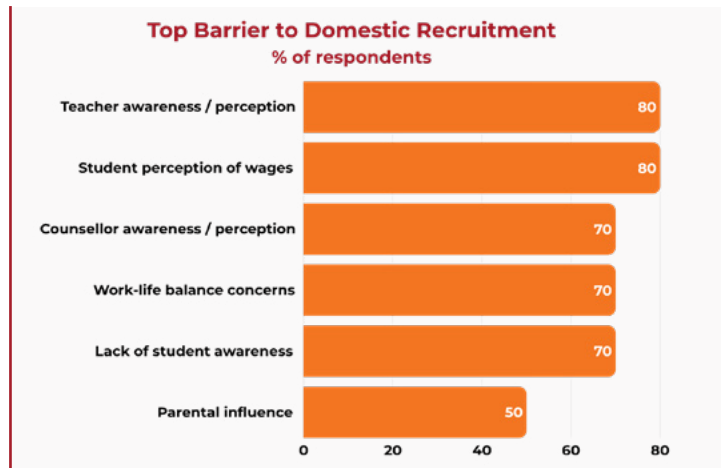


Figure 1



51-75%
employment
(largest response group)

75%
employment
(second strongest group)

Despite recruitment challenges, respondents believe these programs lead to employment. This suggests a disconnect between labour market outcomes and public perception, as well as an opportunity to improve understanding of tourism career pathways among high school students.

This is not to say that there are no material barriers to domestic recruitment for CTH programming. Respondents noted that wage levels, unclear advancement pathways, and a weak professional identity are all obstacles for recruiting domestic students. Some respondents questioned why students would invest in formal education if entry into some roles appears possible without credentials. This signals an important positioning challenge, and the need to clarify the connection between CTH programming and career advancement within the tourism industry. Tourism provides employment access opportunities for secondary school graduates that is a value to the economy, and accessible programming can serve as career building for those who wish to grow in the industry and beyond.

THEME #4:

Opportunities for Work-Integrated Learning, Apprenticeships, and Alternative Delivery Models

Work-integrated learning (WIL), apprenticeships, and alternative delivery models, are seen as critical tools for strengthening domestic recruitment and improving career outcomes for CTH programs. When asked how to improve WIL in tourism, respondents identified financial incentives, better coordination between schools and employers, and simplified administration as top solutions. This suggests that there is an interest in expanding WIL, but that operational barriers remain.

Similar concerns were raised regarding apprenticeship pathways, which are grappling with weak employer incentives, low public awareness, and limited promotion. While apprenticeships related to tourism, such as in culinary, may benefit from recent federal funding for apprenticeships, respondents noted that optional culinary apprenticeships are in competition with mandatory trades programs that have higher starting wages and benefit from more direct government support and marketing. Compared to these mandatory programs, respondents nevertheless felt that tourism presents less barriers to entry.

Another tool for strengthening CTH programming is the implementation of alternative delivery models, such as hybrid programming, modular programming, and micro-credential initiatives. Experimentation with such initiatives appears to be limited, however, suggesting that adaptation to the challenges outlined above is occurring slowly. Equipping CTH programs to better explore these alternative models could play an important role in supporting workforce development through the structural transformation that is underway in the tourism talent pipeline. Similarly, respondents highlighted the need to identify adjacent talent sources at the post-secondary level, such as by focusing on business programs, food science and agriculture, recreation, sustainability, and other program streams that might support tourism's increasingly multidisciplinary workforce needs.

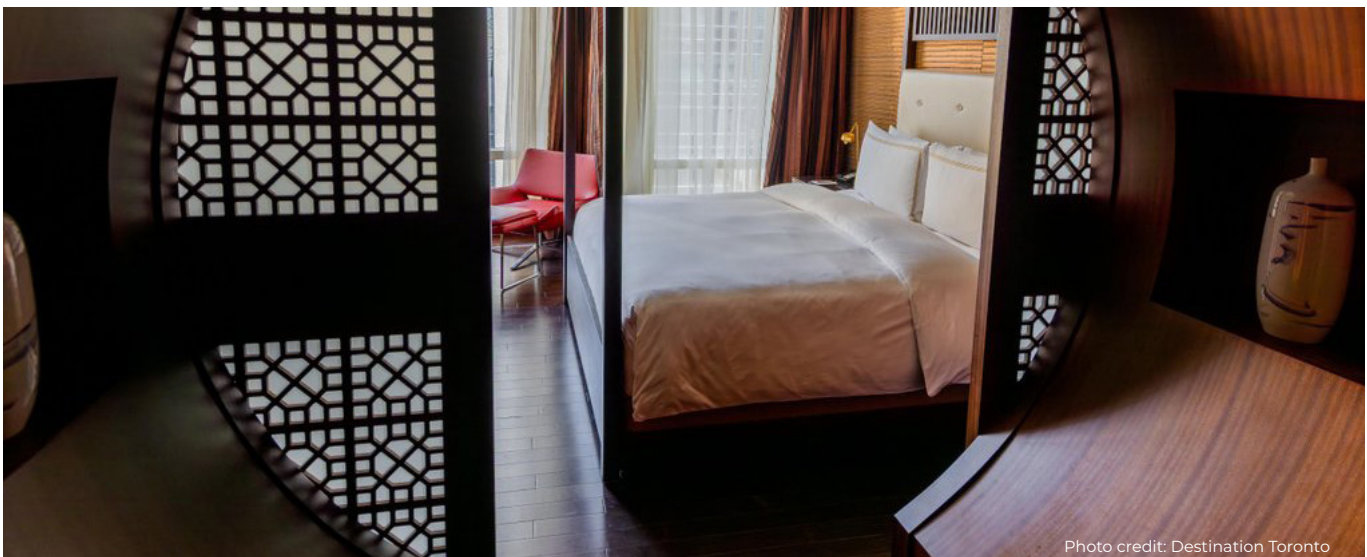


Photo credit: Destination Toronto

CONCLUSION AND RECOMMENDATIONS

Based on our survey of Ontario colleges, it is clear that the tourism workforce pipeline is undergoing a significant restructuring. Federal policy changes are leading to a drastic reduction in international enrolment, which is having a spillover effect on program viability and, by extension, the domestic labour pool. At the same time, CTH programs are struggling with perception challenges that are limiting domestic interest despite strong employment outcomes. While applied learning and alternative delivery models may help to address some of these challenges, there is a need for broader support to reinforce the talent pipeline for tourism and ensure that regional access to skilled labour is protected.

RECOMMENDATIONS:

- 1** Establish a Provincial Tourism Workforce Education Advisory Table that includes government, post-secondary institutions, industry associations, RTOs, and employers, as called for in the Forward Motion tourism strategy
- 2** Support domestic workforce development by providing stabilization funding for culinary, tourism, and/or hospitality programs in rural, northern, and other areas where tourism is a significant source of employment
- 3** Expand and provide funding for work-integrated learning initiatives related to culinary, tourism, and hospitality within secondary and post-secondary schools in Ontario, such as the Canada Summer Jobs Program and the Student Work Placement Program
- 4** Provide funding to Regional Tourism Organizations (RTO), industry associations, and education partners to support the recruitment of secondary and post-secondary students into CTH programs and work placements
- 5** Modernize the Specialist High Skills Major Program to reflect current required skills and knowledge in tourism
- 6** Strengthen and preserve immigration pathways for international students and workers interested in pursuing tourism careers in Ontario, such as the Ontario Immigrant Nominee Program (OINP), Post-Graduate Work Permit (PGWP), and the Rural Community Immigration Pilot (RCIP) Placement Program
- 7** Create a province-wide tourism career awareness campaign targeting students, parents, educators, and guidance counsellors