

# TOURISM 2030: A WORLD OF OPPORTUNITY

MAY 2024



# ACKNOWLEDGMENT

**At Destination Canada, we embrace our responsibility to acknowledge and honour the Indigenous peoples of the lands where we operate and reside. From coast to coast to coast, we recognize the Inuit, Métis, and First Nations peoples who have called this place home for generations beyond measure.**

As storytellers and ambassadors of the diverse tourism sector in Canada, we deeply appreciate the significance of our role in representing the multitude of voices and places that collectively shape Canada. We strive to elevate Indigenous interests and perspectives in our storytelling and tourism experiences, paving the way for an inclusive and authentic portrayal of cultural heritage and natural wonders.

The integration and respect of Indigenous interests are inherently woven into the development of Destination Canada's corporate strategy—*A World of Opportunity*. Our strategy reflects the federal government's priorities for Indigenous tourism and reconciliation. Our approach is focused on ensuring Indigenous peoples have agency over the potential of tourism to enhance their lives. Our actions are a testament to our unwavering dedication to fostering improved relationships among Nations and gaining a profound understanding of the rich cultures and traditions of local Indigenous communities.



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# AN INVITATION TO SHAPE THE FUTURE OF TOURISM IN CANADA

## From Destination Canada's Board of Directors

Tourism is unlike any other industry in Canada: it has far-reaching positive impacts on the people, places, and prosperity of our nation; it supports the wealth and wellbeing of communities in every corner of Canada; and it helps sustain and develop amenities that make life richer for everyone, hosts and visitors alike. Tourism businesses create local jobs and encourage residents and guests to buy local goods and services, leading to profits that stay close to home and strengthen communities. It enables Canadians to celebrate the diverse places, multicultural voices, linguistic heritage of our nation, and support the rich cultures of Indigenous peoples in Canada.

The document before you, *A World of Opportunity*, outlines how our sector will continue to be a force for good in the world, and how we will strive to generate positive net outcomes for the people and places of Canada. It takes into account the

many lessons of the pandemic and hundreds of conversations with stakeholders—Canadians, host cities, small businesses, tourism leaders, and economic experts weighed in on their needs and aspirations, and gave us the cold, hard facts of their post-pandemic world.

*A World of Opportunity* is closely aligned with the *Federal Tourism Growth Strategy: Canada 365. Welcoming the World. Every Day.* as it seeks to contribute to the overarching goals and objectives set forth by the federal government for the growth and development of the tourism sector. It synthesizes that collaboration into nothing less than a new way of defining and measuring the growth of our sector, and the wealth and wellbeing of our host communities.

This strategy is a bold leap forward—it's both vision and how-to. The strategy explains how

we will chart a path for sustainable growth to achieve our sector's full economic potential and generate as much as \$160 billion in annual revenue by 2030. It details how, working together with all of you, we can advance the attractiveness of Canada's brand as a travel destination, advise governments on policy reform, stimulate investment and innovation, and improve asset and workforce productivity—while also promoting sustainable economic, cultural, and environmental outcomes for the sector throughout the country.

The collaborative process that went into the strategy, the work of understanding what needs to be done, and the scale of the task before us all has been as eye-opening as it is energizing. The strategy will provide both challenges and exciting opportunities for tourism businesses and communities across the country.

It is designed to make our sector more resilient and ready for change, and to make Canada an enduringly desirable destination for the world—and, most importantly, a sustainable, loveable, and prosperous home for our children and generations of Canadians to come.

**Join us on this journey.**



**Liza Frulla**  
Chair of the Board of Directors, Destination Canada



**Marsha Walden**  
President & CEO, Destination Canada

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***A World of Opportunity* is a forward-thinking approach to strengthening the positive impacts tourism can have on people, places, and prosperity across Canada.**

Liza Frulla, Chair, Board of Directors, Destination Canada

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“

**As Canada's tourism sector moves beyond recovery, our impressive growth trajectory presents both exciting opportunities and complexities that require a new path forward.**

Marsha Walden, CEO, Destination Canada

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# HOW TOURISM POWERS CANADA

## Central to the New Economy

Economies of the future will be more services-based, fueled by the mobility of people as well as capital and ideas. As Canada's #1 export services sector, tourism is a critical enabler of the new economy as Canada transitions from an extraction- and manufacturing-based economy to a knowledge- and services-based economy. Tourism is a catalyst for our overall Canadian economy—through transportation links, accommodation, hospitality, conferences, and other sub-sectors. Tourism links us to the world and the world to us.

## Community Builder

Tourism helps sustain the amenities that make life richer for local residents—such as transportation links within Canada and to the world, festivals and museums, trails and recreation facilities, arts and culture, pubs and restaurants, and many others. What's more, tourism helps a vast array of adjacent businesses thrive—from the local florist that supplies hotels and restaurants to local gas stations that fill the tank for driving vacations and RV rentals.

## Job Generator

Tourism sustains about one in ten jobs across Canada in virtually every part of the country, both rural and urban. The sector offers exciting career options for a vast array of talents and temperaments. Tourism serves as a critical onramp to Canada's economy by providing both entry-level roles for people embarking on their careers—whether learning a new skill or learning a new language—as well as excellent long-term careers, with over a third being considered high income jobs.

## Canada's Identity

Tourism helps Canadian and foreign travellers get to know our land and our people. Sharing authentic Canadian experiences with guests from around the world strengthens our sense of shared identity and our appreciation for diversity. As we share our ideas with the world, the world brings new ideas to us.

## Protecting Natural Assets

Canada is world-renowned for the beauty of its land, rugged coastlines, and majestic wildlife. That's worth protecting. Tourism can only flourish in the long-term when it is supported by a healthy environment and welcoming communities. We are adopting a regenerative approach to tourism growth—acting to preserve, improve, and repair our environment. When tourism thrives, we all thrive.

## A Path to Reconciliation

Tourism provides a platform for truthful storytelling. To truly represent Canada to the world, we must understand our country's history. We are a country of both amazing achievements and terrible injustices. We need to see it for what it is, what it has been, and what it is becoming. From here, we must build the Canada we want.

# WHY WE'RE HERE: DESTINATION CANADA

## Mandate

Destination Canada is pivotal in driving Canada's visitor economy, and we're dedicated to enhancing the performance of the tourism sector by 2030. Destination Canada's legislative mandate is to:

- **Sustain a vibrant and profitable Canadian tourism industry;**
- **Market Canada as a desirable tourist destination;**
- **Support a cooperative relationship between the private sector and the governments of Canada, the provinces, and the territories with respect to Canadian tourism; and**
- **Provide information about Canadian tourism to the private sector and to the governments of Canada, the provinces, and the territories.**

To fulfill our mandate in the wake of the global pandemic—and with an eye to future challenges—we recognize the need for transformative growth and greater resilience in our sector. *A World of Opportunity* outlines our commitment and areas of focus to support the development of the visitor economy by unlocking new opportunities and addressing challenges head-on.

Together, we are rebounding from disruptions and adapting to ever-evolving circumstances, ensuring the prosperity of Canada's tourism industry.





## Delivering on Government Goals

Together with other federal agencies, Destination Canada is a key part of the federal government's ability to deliver on its tourism growth strategy—*Canada 365. Welcoming the World. Every day.* ([Find it here.](#)) The federal strategy sets out two main goals for Canada's tourism sector: (1) to become a Top 7 global tourism destination and (2) to grow tourism GDP by 40% by 2030. It identifies five priorities for government action:

- Invest in tourism assets
- Embrace recreation and the great outdoors
- Partner to grow Indigenous tourism
- Attract more international events
- Improve coordination with federal Ministerial Tourism Council

Destination Canada's corporate strategy—*A World of Opportunity*—supports the federal goals and priorities through a myriad of programs and partnerships we deploy here in Canada and around the world. We are aligned around an ambitious growth agenda, and we have identified the means to achieve it through our work on behalf of tourism businesses and employees. Read on to discover how we will meet those goals and more.



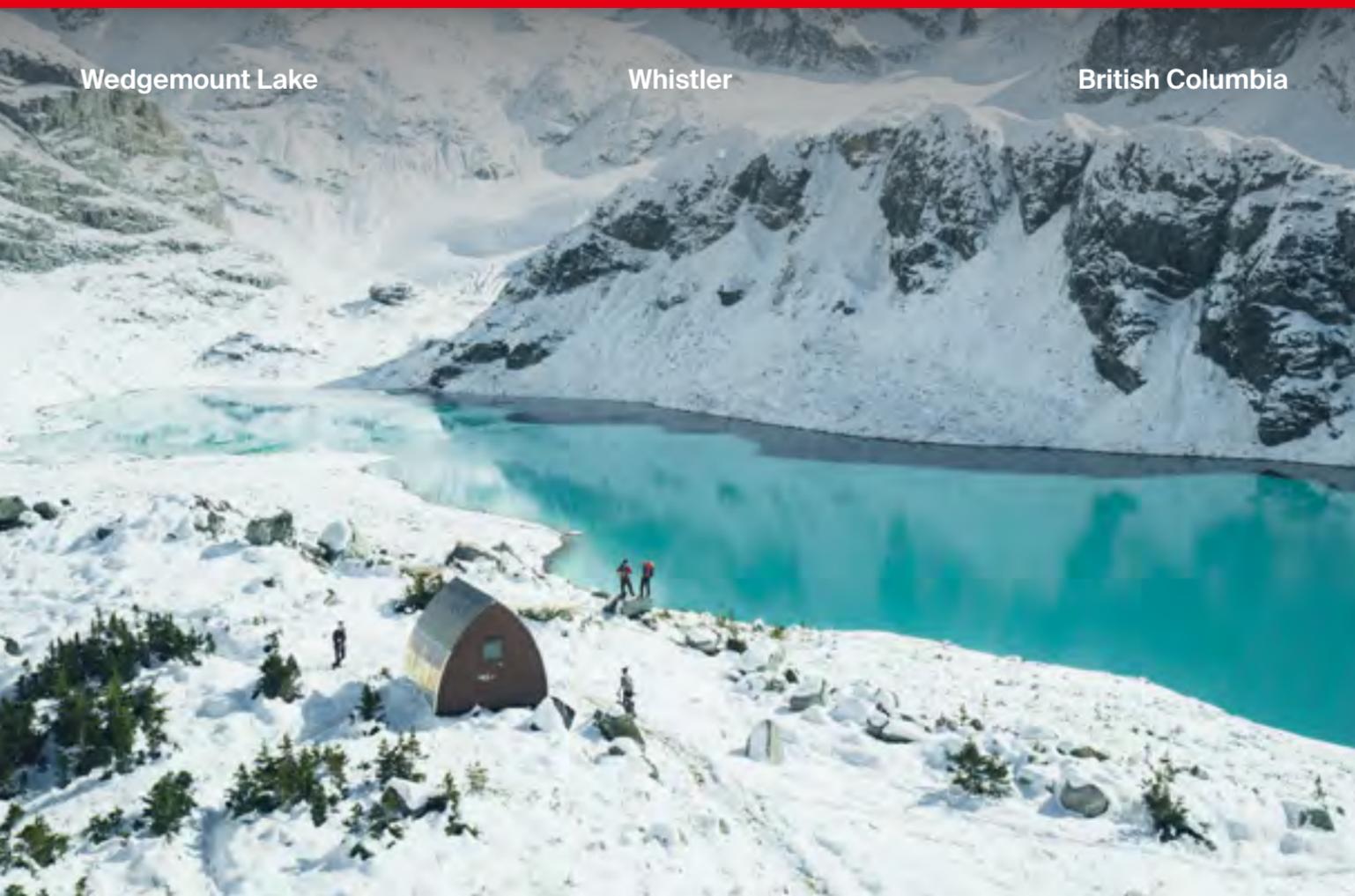
**The Goal: Become a Top 7 global destination by 2030.**

**OUR ASPIRATION:  
A COLLECTIVE  
VISION FOR 2030**



North Saskatchewan River

Alberta



Wedgemount Lake

Whistler

British Columbia

**Our aspiration is to help tourism generate wealth and wellbeing for all of Canada and enrich the lives of our guests. The way there requires a fresh perspective, and that's exactly what *A World of Opportunity* is about.**



Elsipogtog Mi'kmaq Cultural Center

New Brunswick

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**Achieving the \$160 Billion goal demands collective effort across the tourism industry to dismantle barriers hindering growth.**

**Stuart Back, Chief Operating Officer,  
Pursuit Collection**

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# FROM GOOD TO TRANSFORMATIVE

**How do we get to true prosperity—to growth that makes a difference for businesses and communities?**

We move beyond conventional measures of growth and revenue.

We consider community wellbeing, environmental impact, and cultural vibrancy. We reassess our target audiences, the timing of visits and preferred destinations to better utilize our capacity and improve ROI.

We reevaluate the investments, infrastructure, and policies needed to better support our sector and our communities. The goal is to achieve inflation-adjusted revenue growth that makes businesses more profitable and communities more prosperous, ensuring the continuous flow of new capital into our sector.

While real, transformative growth will strengthen prosperity for tourism businesses, a regenerative approach—one that factors in societal wealth and wellbeing, and contributes to environmental sustainability—will earn the favour of visitors and support from Canadians. Together, this will make our sector stronger and more resilient.

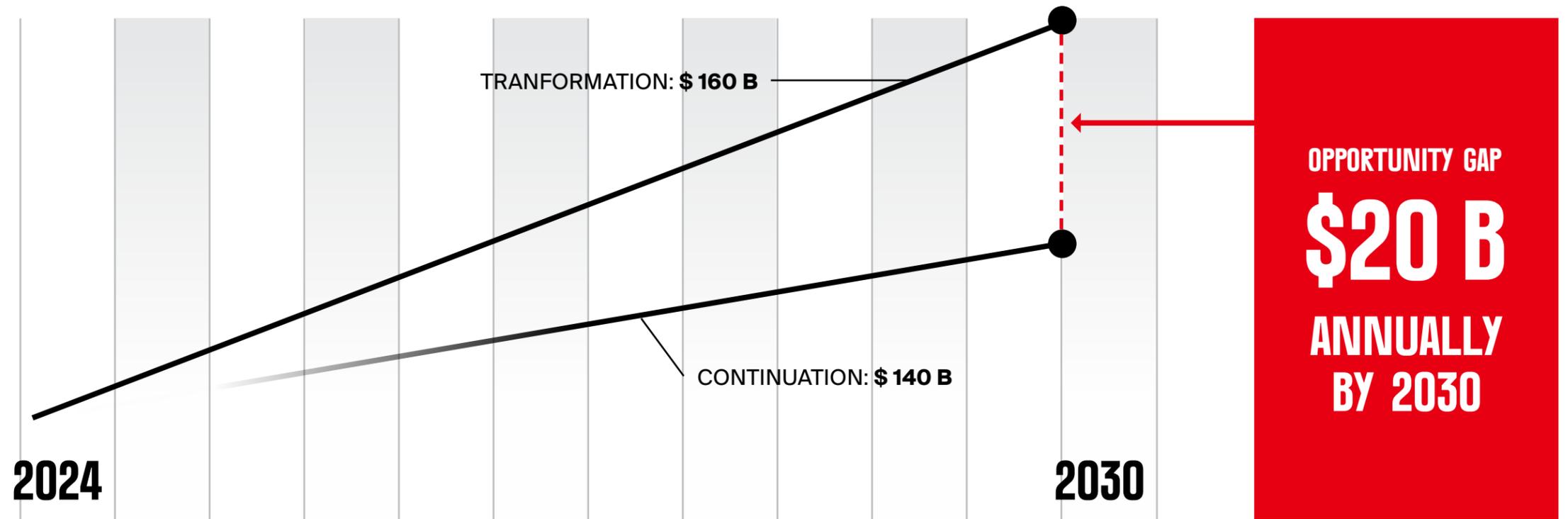
## Why reach higher?

In 2019, the sector set a new benchmark of \$105 billion in revenue. The status quo path between now and 2030, based on expected future market conditions, would take us to \$140 billion in revenue. While this represents growth, it barely compensates for inflation, offering little true advancement for tourism businesses and their employees.

Aiming for transformative growth, however, gives the sector the potential to grow to \$160 billion annually in revenues by 2030<sup>1</sup>, a \$20 billion annual difference that propels all of us to the next level—a 6.1% year over year growth rate for businesses that support communities all across Canada.

Among the total revenues of \$160 billion, it is anticipated that \$49 billion will stem from tourism exports, reflecting spending by international visitors in Canadian destinations, and \$111 billion is expected to result from expenditures by Canadians within Canada, inclusive of fares paid to Canadian carriers.

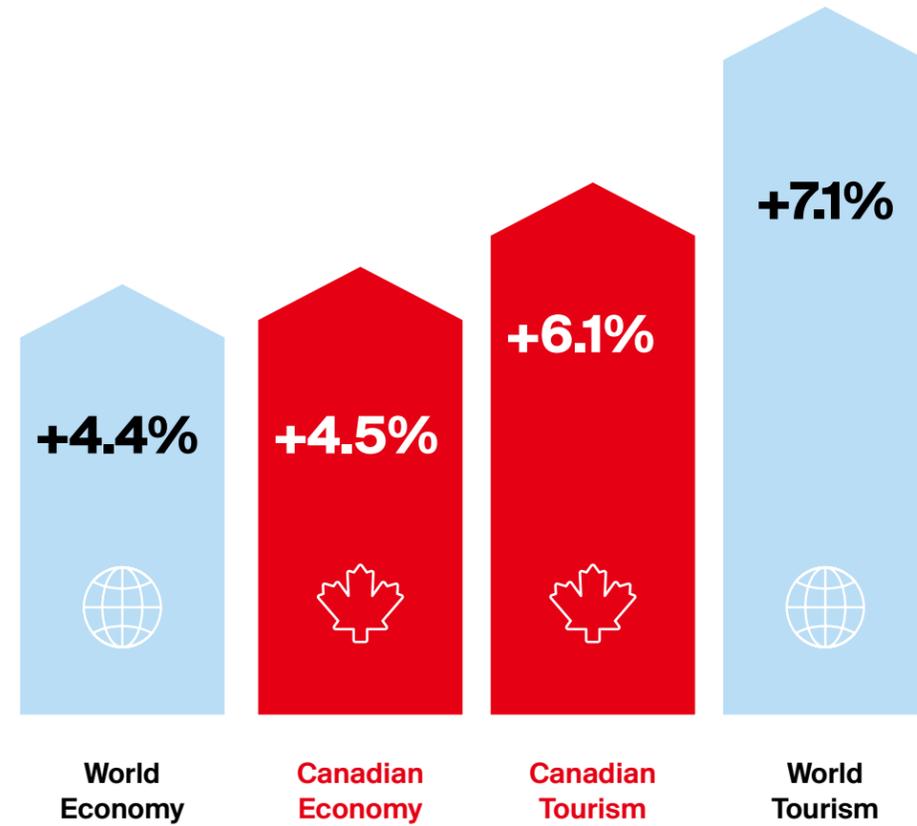
### Unlocking a World of Opportunity



<sup>1</sup> Source: Tourism Outlook Fall 2023, Destination Canada, Tourism Economics

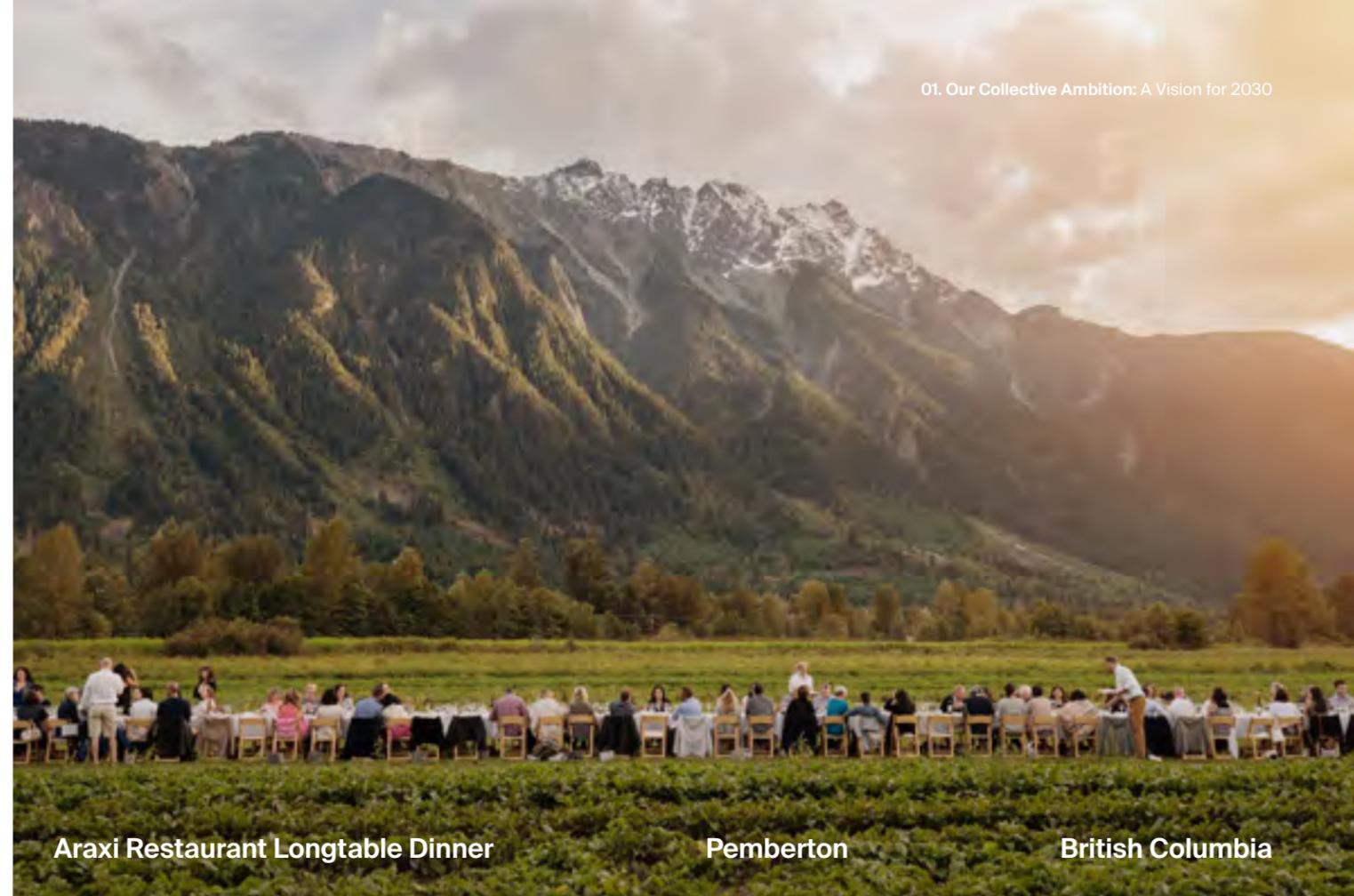
### Compound Annual Growth Rate 2024 to 2030

Nominal CAD



Tourism will significantly outpace Canada's economy, but Canada's tourism growth could do even more to strive for the global average of 7.1% annual growth.

Source: Tourism Outlook Fall 2023, Transformation Scenario, Destination Canada, Tourism Economics.



Araxi Restaurant Longtable Dinner

Pemberton

British Columbia

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**We believe aiming for 6.1% growth is imperative for ensuring the prosperity of our sector and our communities.**

Marie Pier Germain, Vice President Sales and Marketing, Germain Hotels

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# A FOUNDATION FOR TRANSFORMATION

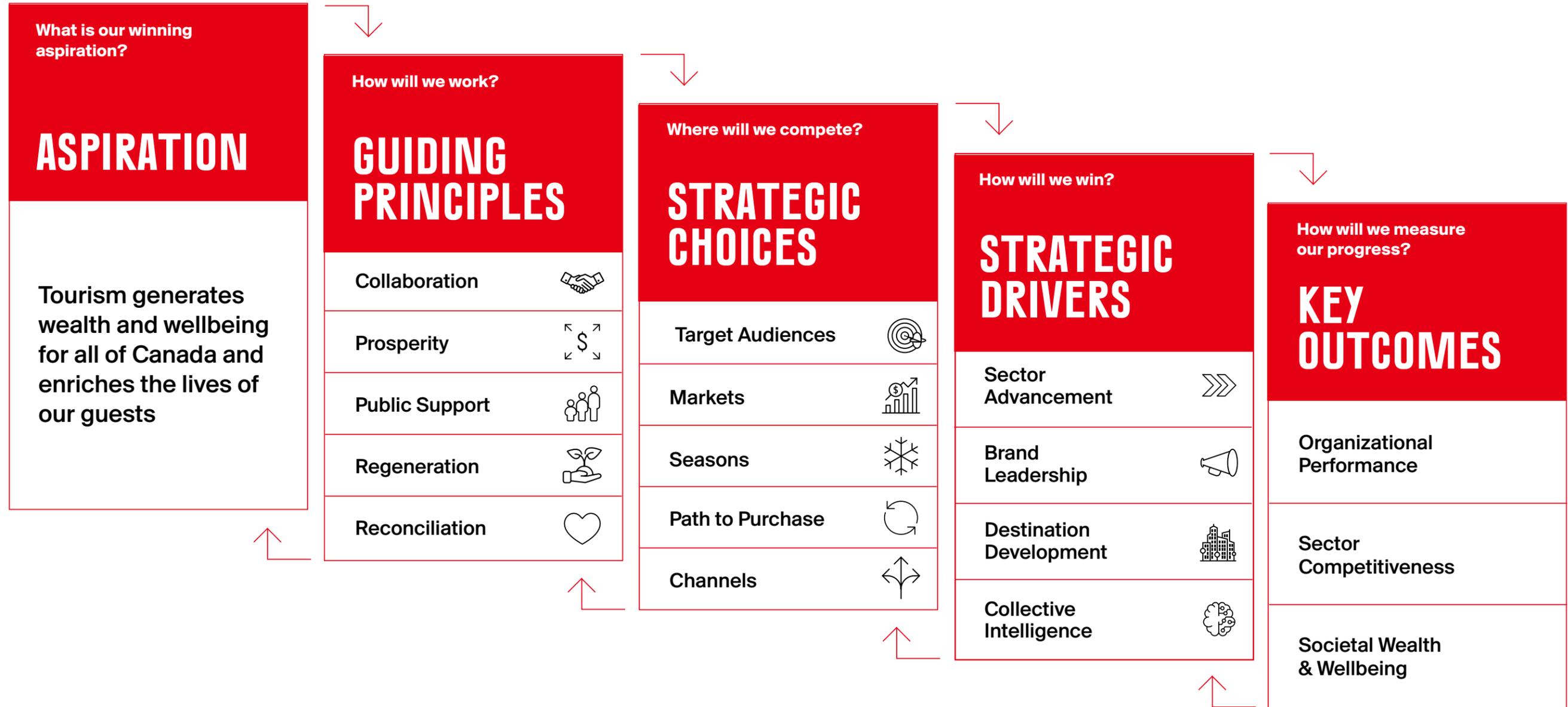
A world of opportunity awaits us. But to achieve transformative growth, Canada's tourism sector must become more globally competitive. We must unleash our full potential by leaning into our areas of strength and by systematically addressing the barriers and constraints that hold us back. From limited capacity for growth in peak seasons to new investment mechanisms for private and public actors. From workforce productivity and supply to sustainability practices. From a faster digital transition to greater transportation access to and within our vast country. Our corporate strategy—*A World of Opportunity* grew from extensive consultations and work with partners, and its success hinges on true collaboration between public and private entities across our very complex ecosystem. To compete successfully and capture our share of global growth, we must work differently.

Within the pages of our corporate strategy you'll discover:

- **Guiding Principles that will shape how we work;**
- **Strategic Choices that describe where we will compete and for which markets—the playing field;**
- **Strategic Drivers that focus our work on how we will win, supported by a set of prioritized initiatives; and**
- **Outcomes with key performance indicators that will measure our progress.**

Together, let's build a foundation for transformation that propels Canada's tourism sector into a new era of growth and success.

# A World of Opportunity



## Aspiration

Tourism generates wealth and wellbeing for all of Canada and enriches the lives of our guests

### Guiding Principles

*A World of Opportunity* is anchored by five principles that are aligned with the Federal Tourism Growth Strategy and designed to guide our sector to a vibrant, profitable, and sustainable future: Collaboration, Prosperity, Public Support, Regeneration, and Reconciliation.

These principles guide our approach to marketing and managing our destination. They're commitments we make to ourselves as stewards, to our land, our communities, our partners, and our guests. Together, we can shape a future where the tourism sector embodies these principles, creating a positive impact for all.



#### Collaboration

Tourism stakeholders inspire innovation and foster alignment within the tourism sector and the larger economy.



#### Prosperity

Tourism businesses in Canada grow stronger, are more profitable and more resilient, and tourism's contribution to the economy grows.



#### Public Support

Tourism benefits all of Canada, making Canadians welcoming hosts and supporters of the industry.



#### Regeneration

Tourism is a force for driving the economic, socio-cultural, and environmental vitality of our places, businesses and communities, benefitting all Canadians.



#### Reconciliation

By connecting people, tourism helps Canadians to better know and understand one another, breaking down barriers and building unity.



# WHERE WE WILL COMPETE: STRATEGIC CHOICES



Parc du Bastion-de-la-Reine

Quebec City

Quebec



North Star Adventures

Northwest Territories

Here's the competitive playing field—audiences to markets, channels to segments—on which we'll win transformative success.



Twin Falls Lodge

Saskatoon

Saskatchewan

# LEISURE TRAVEL

We want Canada to be a destination that resonates deeply with travellers. And not just because of their experience here, but because travel to Canada leaves a mark on their hearts and gives them stories to tell long after they return home.

Adventurers, cultural enthusiasts, and business decision-makers make up our most valued guests. These travellers appreciate supporting and contributing to local culture. They celebrate diversity and positively influence the economic ambitions of our communities.



## Global Travel Research Program (GTRP)

This research study provides ongoing consumer-based intelligence on awareness, travel intentions, brand perception, and experiences in nine of our key markets around the world—plus Canada and new test markets—to identify motivators and barriers for target guests to travel in Canada.

## Target Audiences

Everyone is welcome in Canada, but our focus is on guests with the best return on investment (ROI) for Canadian communities, businesses, and residents. We'll concentrate on travellers who stay longer, spend more, seek local culture, and truly engage with Canada, leaving our destinations better than they found them and becoming advocates for Canada through word-of-mouth. Each year, we deepen our understanding of them, tailoring products and experiences to their preferences, and reaching them through smart, highly targeted sales and marketing.

To make sure that we're keeping up with the changing preferences of our target audiences, we continuously monitor consumer trends and stay attuned to the evolving landscape through market research and data analysis, including the Global Travel Research Program (GTRP) and the Global Segmentation Program.



## Global Segmentation Program

Destination Canada is evolving the Explorer Quotient (EQ/EQ 2.0) segmentation program to help organizations better understand addressable traveller profiles and behaviours, and accurately categorize travellers by their travel motivations and values.



**A deep understanding of key target audiences is critical to ensure we attract the right visitors at the right time of year.**

**Nina Kressler, President and CEO,  
Shaw Centre Ottawa**



→ Find each program under the Canadian Tourism Data Collective at [DestinationCanada.com](https://DestinationCanada.com).

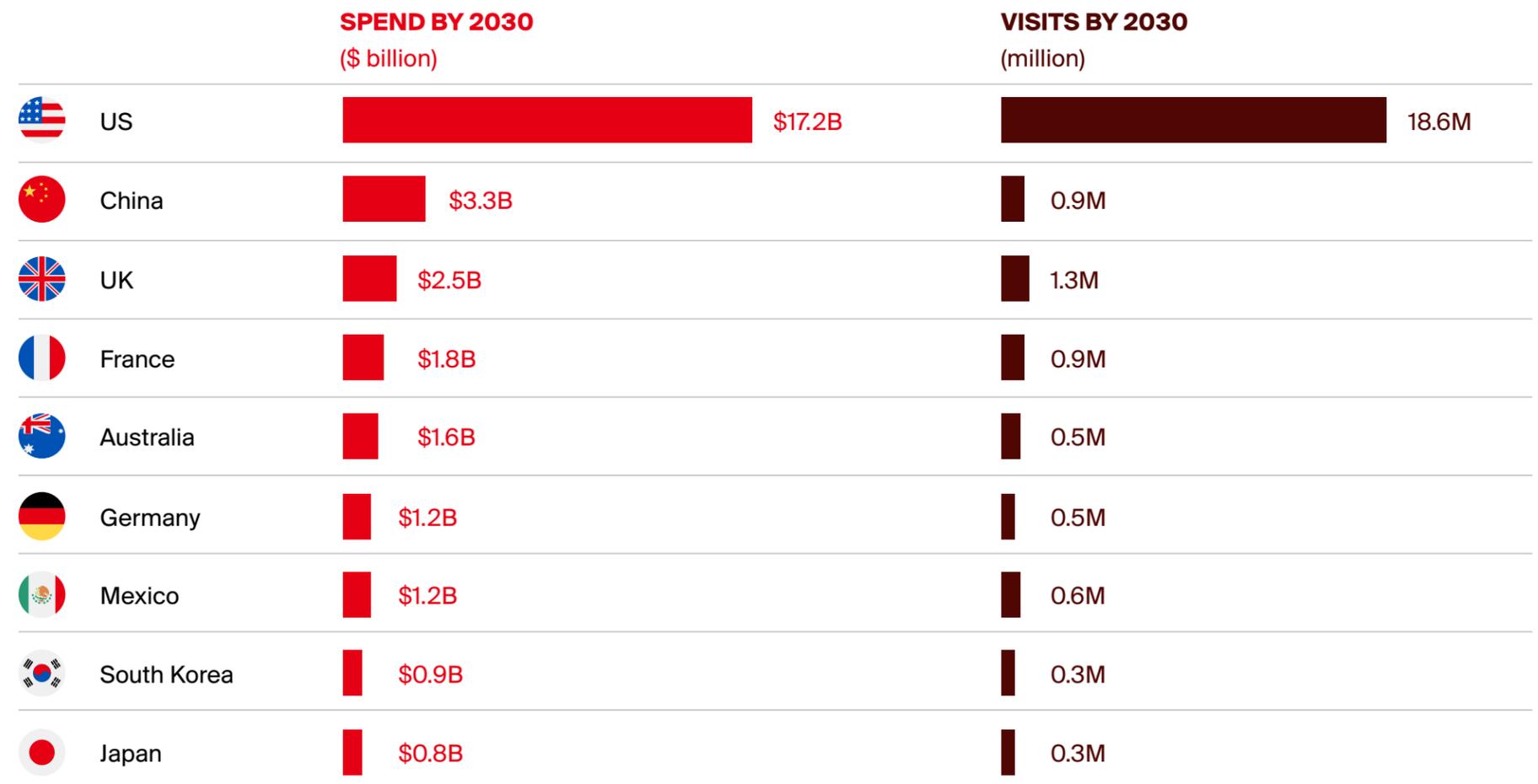
# Key Markets

We target international guests originating in nine key markets: the United States, United Kingdom, France, Germany, Mexico, Australia, Japan, South Korea, and China. Each year, we'll re-examine our market priorities, and re-examine new markets, to optimize our investments in consultation with our partners.

As we look ahead, the vitality of tourism in Canada will hinge on attracting the right travellers from these key markets. While domestic travel constitutes over three-quarters of tourism revenue in Canada, international travellers tend to spend much more, driving up yield for tourism businesses, and earning valuable export revenue for our economy. We are anticipating a robust \$49 billion in export revenue from international visitors—both leisure and business. We expect our key source markets to generate almost 80% of total international tourism revenues, with seven markets generating over one billion dollars each in tourism revenues annually by 2030.

Our collaboration with airlines, airports, and Canadian destinations is a strategic effort to facilitate access and connectivity for international visitors to Canada. We will work with airlines, airports and industry to drive demand for existing and new routes and support geographic and seasonal dispersion of visitors throughout the year.

## Canada's Key International Leisure Markets



Source: Tourism Outlook Fall 2023, Transformation Scenario, Destination Canada, Tourism Economics.

# Canada in More Seasons

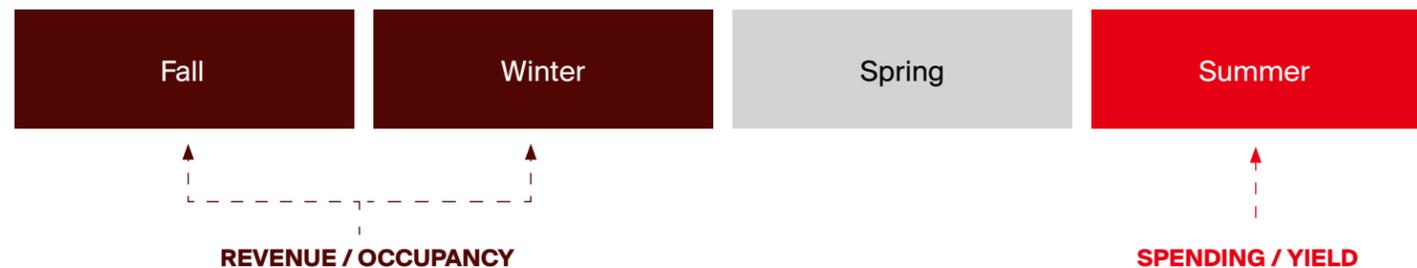
A key objective for transformative growth is to maximize the economic impact of tourism in Canada in more seasons. But unless there is considerable investment in tourism infrastructure in the years to come—everything from hotels to experiences—we forecast Canada will have significant capacity constraints in core tourism destinations during peak seasons.

To fuel growth, we need to host our highest yield clients in peak seasons, and create exceptional seasonal experiences for all travellers in all seasons. This will improve ROI on Canada’s tourism assets while we expand capacity.

What’s more, seasonal and regional dispersion will foster business and community resilience in the face of climate-related crises such as wildfires or lack of snow. Longer seasons also make our industry more attractive to employees.

Fall and winter are under-exploited opportunities. We can increase interest in visitation in non-peak seasons, which may involve expanding operations and creating new product. Our peak summer season is our mainstay, offering an opportunity to capture incremental value from our best guests—those who travel further, engage locally, spend more, want to learn, and are likely to return often.

## Seasonal Focus



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Strategically dispersing travellers across all seasons is crucial for reaching our full potential and supporting destinations and businesses year-round.

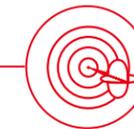
Kevin Murphy, Owner, Murphy Hospitality

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### Tourism Outlook

For more information on our revenue forecasts to 2030 and specific market insights, you can access the latest tourism outlook [here](#).



### Market Plans

Our annual [Market Plans](#) are available to NorthStar partners, Business Events, Team Canada partners, DMOs, and Sector Associations through our Industry Partnerships team.



### Market Allocation Platform

The Market Allocation Platform provides a scorecard allowing markets to be compared and prioritized. It uses a broad range of standardized measures of market revenue potential while considering risks, costs, and opportunities. The Market Allocation Platform allows marketing decisions to be driven by facts using comparable measurements of true market potential. It is one of several critical inputs influencing decisions on our choice of markets and investments.

→ Find each program under the Canadian Tourism Data Collective at [DestinationCanada.com](https://DestinationCanada.com).



**Destinations and industry partners have the opportunity to work together at all scales to achieve a unified brand that speaks to our target markets.**

**David Munteer, President and CEO, Jonview Canada**



## Sales & Marketing Channels

In each of our key markets around the world, travellers have different preferences as to how they research and book their travel. The channel preferences of leisure travellers are constantly evolving as new ones emerge—whether travel trade, online platforms, or emerging AI models. Host destinations for business events are continuing to invest in traditional sales channels, while seizing upon new, intelligent platforms that can simplify their clients’ buying process. We know that generative artificial intelligence is rapidly changing how people work, how they source and use information, and how they will make purchases in future.

The travel sector is particularly poised for disruption by generative AI, especially in functional areas such as marketing, customer service, planning and booking, and experience delivery. This disruption will accelerate as consumers and businesses embrace GenAI capabilities at an unprecedented and exponential pace. Our sector must embrace the power of AI. Fast.

Destination Canada’s channel strategy will be coordinated with our partners and will be agile and responsive to the changing behaviours of our target audiences.

## Path to Purchase

Based on the needs of our destination marketing partners—whether for Business Events or Leisure travel—Destination Canada’s role is clear. We must lead a unified national brand, inspiring interest and cultivating consideration for Canada and its remarkable destinations. Our ongoing efforts amplify Canada’s quintessential characteristics—the open hearts, open minds, and vast open spaces that seamlessly connect people, geography, and seasons.

In close collaboration with our partners, we’ve charted a course for effective integration across various sales channels, supporting them in securing bookings and fostering a desire for repeat visits.

### Path-to-Purchase Loop



# BUSINESS EVENTS

Business events—conventions, conferences, corporate meetings, and incentive travel—represent significant economic potential for communities across Canada, and particularly benefit urban centres of all sizes.

Our primary focus is on meeting planners and C-suite executives who decide where business events will take place—choices that are driven by strategic evaluations of potential host destinations. The competition is fierce, and the sales cycle can extend over several years.

Our efforts are strategic and global. We will collaborate with tourism partners, government agencies, and private sector industries to attract organizations that align with six of the key economic growth sectors of the future identified by the Government of Canada: digital industries, life sciences, natural resources, advanced

manufacturing, agribusiness, and finance and insurance. We'll also work with influential third-party agencies to secure incentive travel business, leveraging their international client bases to promote Canada and ensure that our business events assets stand out.

Further, to support our own tourism sector, we will identify opportunities to host major global business events related to tourism.



## Business Events Sustainability Plan

With sustainability becoming an important criteria for [event decision-makers](#), we are proud to now have 20 Canadian cities measuring their progress using the Global Destination Sustainability Index.

## Target Growth Sectors

### DIGITAL INDUSTRIES



Many digital and technology leaders call Canada home, including the world's highest concentration of Artificial Intelligence start-ups.

### LIFE SCIENCES



In key areas across Canada, medical minds are working on solutions to the world's greatest health concerns.

### ADVANCED MANUFACTURING



Made in Canada is something to be proud of. We're a leader in robotics, automation, and 3D printing—driven by a highly educated and skilled workforce.

### NATURAL RESOURCES



With our wealth of natural resources, we're experts in a host of industries, from ocean science and forestry to mining and energy.

### AGRIBUSINESS



From wheat to canola, we're global leaders in food growth, food security, and technologies to help feed the world.

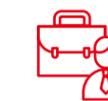
### FINANCE AND INSURANCE



Canada is home to a thriving entrepreneurial and financial ecosystem that encourages investment and business development.

## Target Decision-Makers

### C-SUITE DECISION MAKERS



### MEETING PLANNERS



# How You Can Unlock New Opportunities

## TOURISM BUSINESSES

### Crafting Unforgettable Experiences

Tailor your offerings to match the preferences of our ideal travellers—those who stay longer, explore deeper, and savour local delights.

### Unlocking Key Markets

Align with the identified key markets and cater to international visitors seeking the Canadian allure.

### Embracing All Seasons

Invest in unique experiences and infrastructure to lure visitors during non-peak seasons.

### Connecting with Guests

Collaborate with destination marketing organizations to better understand behaviours and motivations of target audiences to align initiatives.

### Attract Business Events

Demonstrate your commitment to environmental and social responsibility to appeal to conscientious decision-makers who prioritize sustainable practices when selecting event venues and services.

## DESTINATION MARKETING ORGANIZATIONS

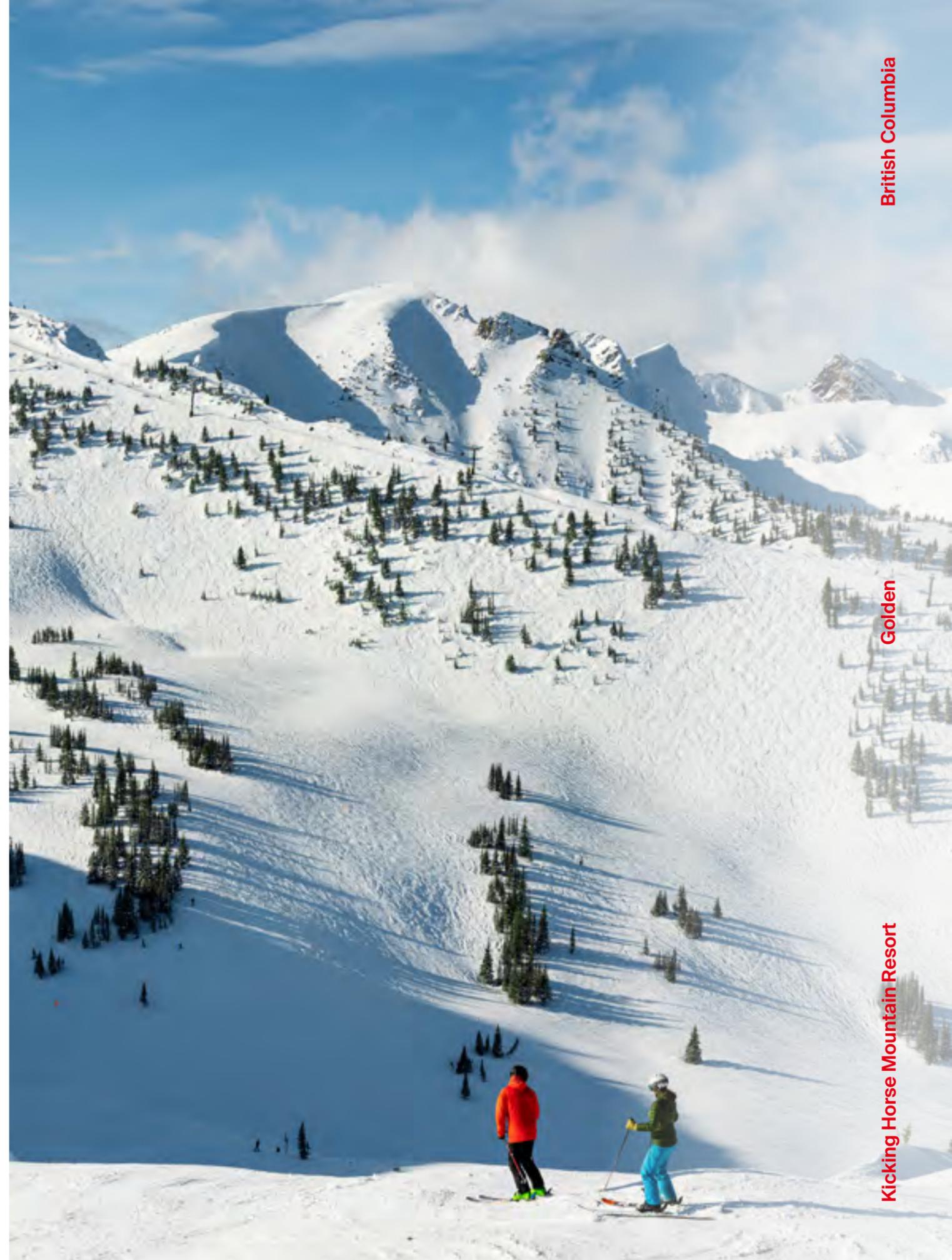
Share traveller insights with businesses to ensure a personalized and unforgettable experience.

Share your best local content with Destination Canada to help showcase your destination on a world stage. Participate in trade shows and fairs.

Work with local operators to expand seasonality, two weeks at a time.

Support businesses in securing bookings and fostering a desire for repeat visits through integrated sales strategies to drive conversion.

Tailor your messaging to resonate with organizations in digital industries, life sciences, natural resources, advanced manufacturing, agribusiness, and finance and insurance. Ensure your destination stands out as an ideal choice for their events.



# HOW WE WILL WIN: OUR STRATEGIC DRIVERS

Toronto Island Boathouse

Toronto

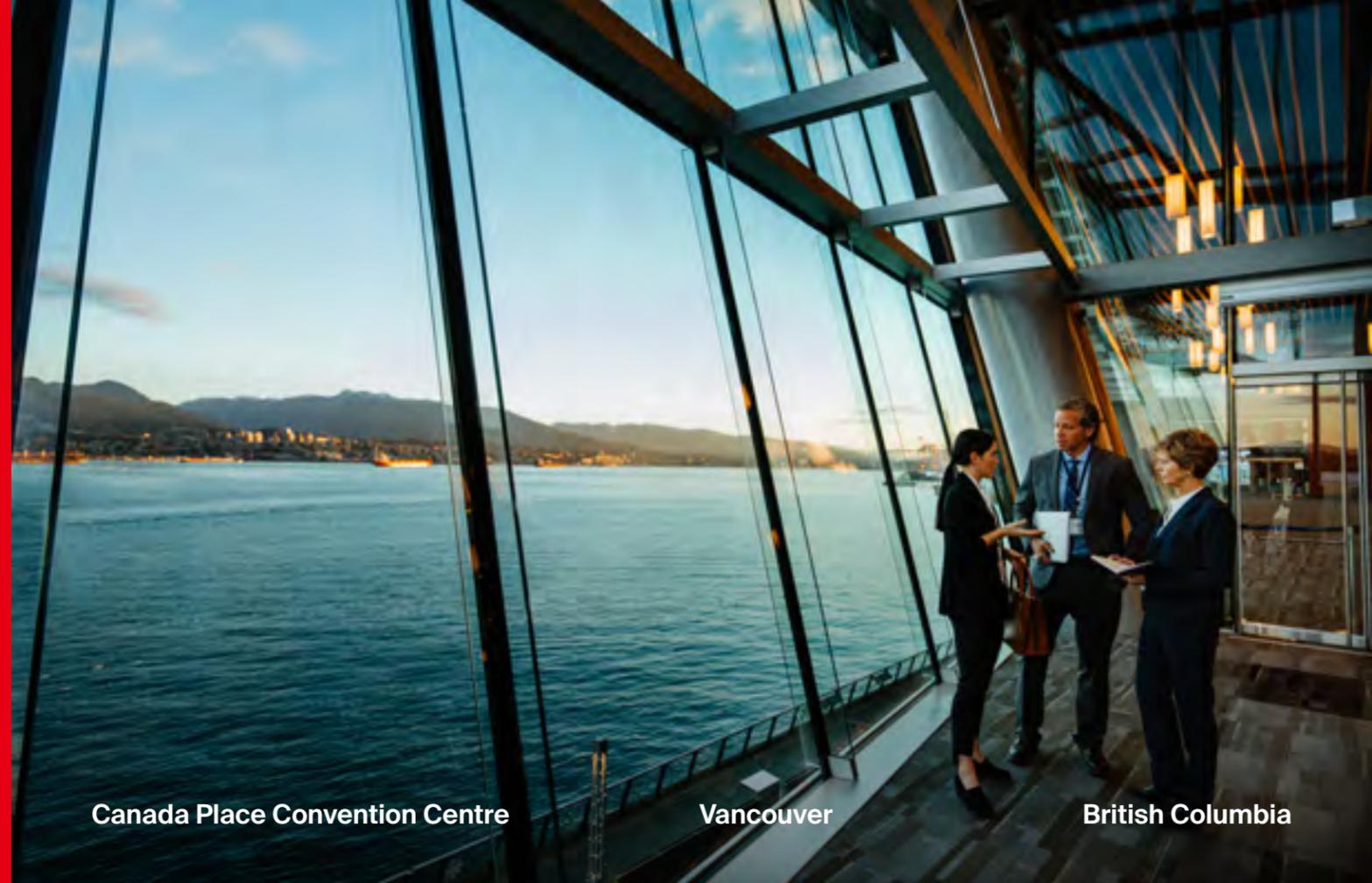
Ontario



Canada Place Convention Centre

Vancouver

British Columbia



With *A World of Opportunity*, Destination Canada will focus on four Strategic Drivers—Sector Advancement, Brand Leadership, Destination Development, and Collective Intelligence. For each Strategic Driver, Key Performance Indicators will measure progress, and defined Initiatives and Actions provide clarity on Destination Canada's role. Where we possess distinctive capabilities, we take the lead, directing and funding initiatives. In areas where other partners and stakeholders are better positioned, our role shifts to support—providing assistance and valuable information. In essence, we lead where we excel and support where collaboration thrives.

# STRATEGIC DRIVERS

## COLLECTIVE INTELLIGENCE

- LEAD** Analytics to inform sector strategies
- LEAD** Analytics with demand- and supply-side intelligence
- LEAD** Innovation in tourism performance measurement

## SECTOR ADVANCEMENT

## SECTOR ADVANCEMENT

- SUPPORT** Canada's commitment to tourism
- SUPPORT** The advancement of sector competitiveness
- SUPPORT** Sector adoption of regenerative principles
- SUPPORT** Indigenous tourism advancement

## COLLECTIVE INTELLIGENCE



## BRAND LEADERSHIP

## DESTINATION DEVELOPMENT

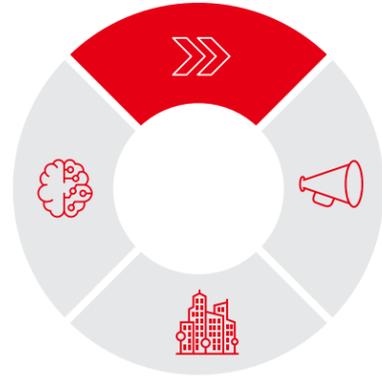
- LEAD** Corridor strategies to create legendary journeys
- SUPPORT** Destination development expertise for the sector
- SUPPORT** Access to capital and investment

## DESTINATION DEVELOPMENT

## BRAND LEADERSHIP

- LEAD** The Canada brand work to differentiate Canada
- LEAD** Global sales and marketing initiatives

# SECTOR ADVANCEMENT



## Building forward to bolster competitiveness and resilience

Canada's tourism sector faces a challenge—our global competitiveness has continued to slip since 2009 according to the World Economic Forum's Travel & Tourism Development Index<sup>2</sup>. This decline highlights our struggle to keep pace with advancements in other countries' tourism sectors.

Competitiveness matters: it attracts investment, creates jobs, and fuels sustainable growth; it encourages innovation, infrastructure development, and service improvements. We will benchmark Canada against leading global destinations to drive positive change in the tourism sector. To improve competitiveness, we are collaborating with stakeholders to identify key industry needs and supportive policies at all levels of government.

As a key convener within the tourism sector, Destination Canada is helping to rally industry and governments to achieve common goals that advance our nation's competitiveness.

<sup>2</sup> World Economic Forum's Travel & Tourism Development Index



Sector Advancement

KEY INITIATIVE 01

Support Canada's commitment to tourism

Together with industry partners, we'll help Canadians and governments at all levels better understand and appreciate the vital contributions tourism makes to communities in every nook and cranny of Canada.

Tourism is big business in Canada, fueled mostly by small businesses. Tourism revenue contributes disproportionately to GDP and plays a critical role in the employment landscape of developed countries—providing both an onramp to the economy for youth and newcomers and employment flexibility for parents and seniors as well as long-term, well-paid careers. Most people recognize the importance of frontline roles such as sommeliers, flight attendants, housekeepers and tour guides, but they often forget that tourism also supports amazing behind-the-scenes careers

for every talent and temperament from event managers to data analysts to aircraft engineers.

But it's not just the economic value and jobs that matter. Tourism is equally valuable for its contributions to Canada's socio-cultural richness—strengthening our sense of identity and pride in our home; celebrating our heritage and multi-cultural mosaic; championing our wilderness and helping preserve our wildlife; enlivening our communities by supporting arts, culture, recreation and entertainment amenities; and creating opportunities to revitalize Indigenous cultures and enable economic reconciliation.

Actions:

- Help communicate the value of tourism to Canadians, stakeholders, and governments.



Gwich'in Helicopters

Tuktoyaktuk

Northwest Territories

“

Much needs to be done to help the Canadian public and policymakers truly understand the scope and positive impacts of responsible, high value tourism in every corner of the country.

Matthew D. Upchurch, Chairman and CEO, Virtuoso

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Sector Advancement

**KEY INITIATIVE 02**

**Support the advancement of sector competitiveness**

**Work with partners to address barriers and seize opportunities, including the new power of generative AI.**

Canada’s tourism sector is striving to become more globally competitive. To achieve this, we must consider the many, many determinants of success that impact a complex, multi-industry sector like ours. That’s why we’ve worked with industry leaders across the sector to gain perspective, garner insight and catalyze actions that will transform tourism in Canada to meet its full potential. We’ve talked with leaders from provincial, territorial, municipal and Indigenous tourism organizations within our NorthStar forum. We’ve consulted with the diverse array of 30+ industry associations that support tourism-related businesses from live music events to airports to culinary. We’ve sought the advice of small business owners and big business luminaries both here in Canada and in our key international markets. We’ve listened to public policy experts and global tourism authorities.

From this work, we’ve identified seven key levers critical to Canada’s global competitiveness and we’re quickly unpacking what it means to be world-leading in these spaces. These seven levers are: Revenue/Yield Growth, Brand Leadership, Investment, Access, Workforce, Sustainability, and Public and Policy Support.

In our role as convenor, integrator, and collaborator, we will bring together sector experience and subject matter expertise to chart a path toward better global performance and to provide good data and advice to policy makers.

**Actions:**

- Convene the sector to advance collaboration and improve global competitiveness.
- Accelerate innovation, adopt new technologies, and quickly embrace the power of AI.

**7 Levers for Improved Competitiveness**

**REVENUE YIELD GROWTH**



Grow demand for seasons and places where Canada has capacity; focus on yield in peak periods.

**BRAND LEADERSHIP**



Invest in Canada’s global brand to inspire travellers to choose Canada.

**INVESTMENT**



Attract investment and enable re-investment in Canada’s tourism assets and infrastructure.

**ACCESS**



Increase access (to and within Canada) and streamline border processes.

**WORKFORCE**



Increase labour supply and productivity and accelerate digital transformation.

**SUSTAINABILITY**



Embrace regenerative principles (Economic, Sociocultural, Environmental) to ensure tourism flourishes.

**PUBLIC & POLICY SUPPORT**



Deepen Canadians’ pride in their home and love for hosting visitors. Share expert advice and insights that create a policy environment where tourism thrives.



Brudenell Riding Stables

Prince Edward Island

“

**Travellers need to see and understand regeneration in their visit. Canada has countless opportunities to practice regenerative tourism.**

Marc Telio, Founder, Entrée Destinations

”

## Sector Advancement

## KEY INITIATIVE 03

## Support sector adoption of regenerative principles

### We will support and promote regenerative practices to facilitate sustainable, responsible growth of our sector.

Regenerative practices mean balancing economic prosperity with environmental stewardship and social inclusivity so that the industry both thrives and contributes positively to the broader wealth and wellbeing of Canada. By promoting regenerative practices, we'll maintain visitor trust, protect local communities, and preserve the natural and cultural treasures that define tourism in our country.

As destination stewards for Canada, we commit with our partners to supporting a proactive response to crises, whether they be environmental, economic, or health-related. We are committed to minimizing negative environmental effects in the short term, achieving net zero in the mid-term, and becoming net positive in the long term—as aligned with the *2030 Emissions Reduction Plan: Clean Air, Strong Economy*<sup>3</sup>.

#### Actions:

- Share low-carbon pathways and practices for tourism, including business events
- Support diversity, equity, and inclusion
- Support sector response to crisis



#### Destination Canada's regenerative approach to tourism

Explore our Regenerative Tourism Framework to gain insights into our approach in Canada and globally. The framework, [available here](#), outlines how a regenerative hosting economy delivers positive outcomes for hosts—socio-culturally, environmentally, and economically. Dive into case stories, principles, and indicators of progress to understand our commitment to regenerative tourism.

<sup>3</sup> Source: Government of Canada, *2030 Emissions Reduction Plan: Clean Air, Strong Economy*

Sector Advancement

# KEY INITIATIVE 04

## Support Indigenous tourism advancement in Canada

### Where welcomed, tourism can help Indigenous communities flourish.

Tourism generates economic prosperity, revitalizes cultures and languages, celebrates music, song, and dance, share stories, art and cuisine, and elevates national pride.

Working with key Indigenous partners, including the Indigenous Tourism Association of Canada, Destination Canada will support capacity-building and marketing efforts to facilitate development of a thriving Indigenous tourism sector that enriches the lives of our guests and the wealth and wellbeing of Indigenous communities throughout Canada.

#### Actions:

- Support Indigenous tourism through marketing, development, and data partnerships



#### Indigenous Tourism

To support our work together, we strengthened our commitment to the Indigenous Tourism Association of Canada (ITAC) through a long-term Memorandum of Understanding (MOU) which will help fuel the growth and resilience of Canada's Indigenous tourism businesses and communities, and contribute to reconciliation.

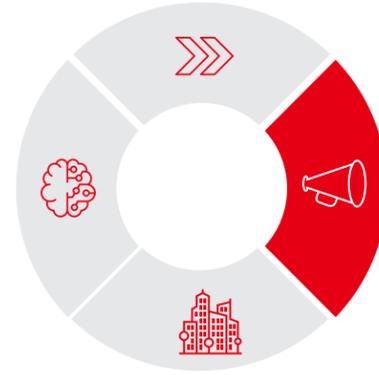


# BRAND LEADERSHIP

## Inspiring interest and consideration for Canada

Canada has incredible stories to tell—and our job is to get more of our target guests to hear them and be eager to visit.

Canada's unique brand value proposition is an expression of Canada's warm and open hearts, smart open minds and wide open spaces. It positions Canada as an ideal destination for travel, business events, education, work, investment, and living. Destination Canada's work reinforces the Canada Brand that unites our country's people, landscapes, and ideas.



Our best guests are adventurers, cultural enthusiasts and business decision-makers. They're travellers who value supporting and contributing to local culture; they celebrate diversity and positively impact the economic ambitions of our communities. Every touchpoint in their journey shapes their impressions of Canada and better defines our brand, whether it's pre-trip marketing, trip-planning, in-trip experiences, and (most potent of all) post-trip word-of-mouth. To compete, we need to be both meaningful and memorable.





CanaDream RV & Camper rentals

Kananaskis

Alberta

“

**Destination Canada brings synergies by telling a story about Canada’s brand, and making sure we understand what that is...lighting the way, making the path, to promoting Canada together. Without a clear, national brand promise, we are fragmenting our ability to have impact globally.**

Tim Liu, Managing Director, Sales Planning & Effectiveness, Air Canada

”

Brand Leadership

**KEY INITIATIVE 05**

**Lead the Canada brand work to differentiate Canada, influencing target guests and business decision-makers**

**We will amplify the nation’s competitive advantages by positioning Canada in the fiercely competitive global marketplace.**

To make Canada stand out, we’re focusing on our unique brand value proposition to showcase what makes us special based on the aspirations and values of our target guests. With looming capacity constraints in peak seasons, we will strengthen Canada’s reputation in the world through strategic partnerships to draw international leisure travellers and event decision-makers.

**Actions:**

- Fortify Canada’s reputation as an open destination in the world to attract target guests for Leisure travel as well as Business Events decision-makers
- Develop brand strategies, tools, and assets to inspire advocacy of Canada among target guests



**Canada Brand**

Canada’s open spaces, open hearts, and open minds will build interest in our people and places and set us apart from others. The Canada Brand story is [available here](#).

## Brand Leadership

**KEY INITIATIVE 06****Lead global sales and marketing initiatives to support demand generation for leisure travel and business events****We will position Canada with key target audiences and guide the choice of products and experiences to improve seasonal ROI.**

To grow the visitor economy, we'll focus on improving yield—increasing return on investment for tourism businesses and communities. Together with partners, we'll continue to shift our peak season growth focus from volume to value in Leisure and Business Events. We'll market to our target travellers based on the amount they spend as well as their purchase preferences, their travel values, the locations they choose, the timing of their visits and the legacy value of the visit or event. The goal: grow yield during peak periods of the year while increasing revenue in non-peak periods.

To attract business events, we work as Team Canada—hand-in-hand with 20+ host destinations—to help attract and support events, conferences, meetings, and incentive travel. We do this by bringing together sellers and buyers

within key global marketplace platforms such as Rendez-vous Canada or IMEX and building interest in Canada as a destination. We focus on positioning and promoting Canada's brand and showcasing the country's state-of-the-art event facilities, world-class hospitality, exceptional public infrastructure, leading thinkers and innovators, and an open, safe, and welcoming environment for international business visitors.

**Actions:**

- Drive demand from target guests in key markets with integrated marketing programs
- Act on collective intelligence to develop international sales and marketing plans, and to refine market and channel strategies on an ongoing basis
- Lead Team Canada at key industry leisure and business events
- Quickly embrace and apply the power of artificial intelligence as it changes and accelerates the traveller path-to-purchase

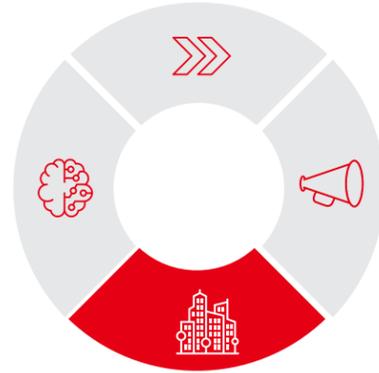
**Artificial Intelligence (AI)**

We've been deploying artificial intelligence in our marketing and research analytics for many years. But the new capabilities quickly emerging through generative AI and large language models will transform every aspect of our industry, our organization, and our society.

Embracing the transformative power of AI will spur innovation across the entire spectrum of the tourism experience. Beyond crafting personalized travel itineraries, AI is reshaping interactions through intelligent automation in customer service, dynamic pricing, and hyper-targeted marketing. Whether it's offering real-time assistance while travelling or crafting marketing content that speaks directly to individual preferences, AI will empower the Canadian tourism sector to connect with travellers on a whole new level—pre-trip, in-trip, and post-trip.

Within Destination Canada itself, AI is streamlining our operations and raising our productivity—from automating routine tasks to analyzing data for strategic decision-making to creating personalized marketing content at scale. By quickly embracing the power of AI and forward-thinking practices, we will stay agile as the tourism sector experiences monumental change.

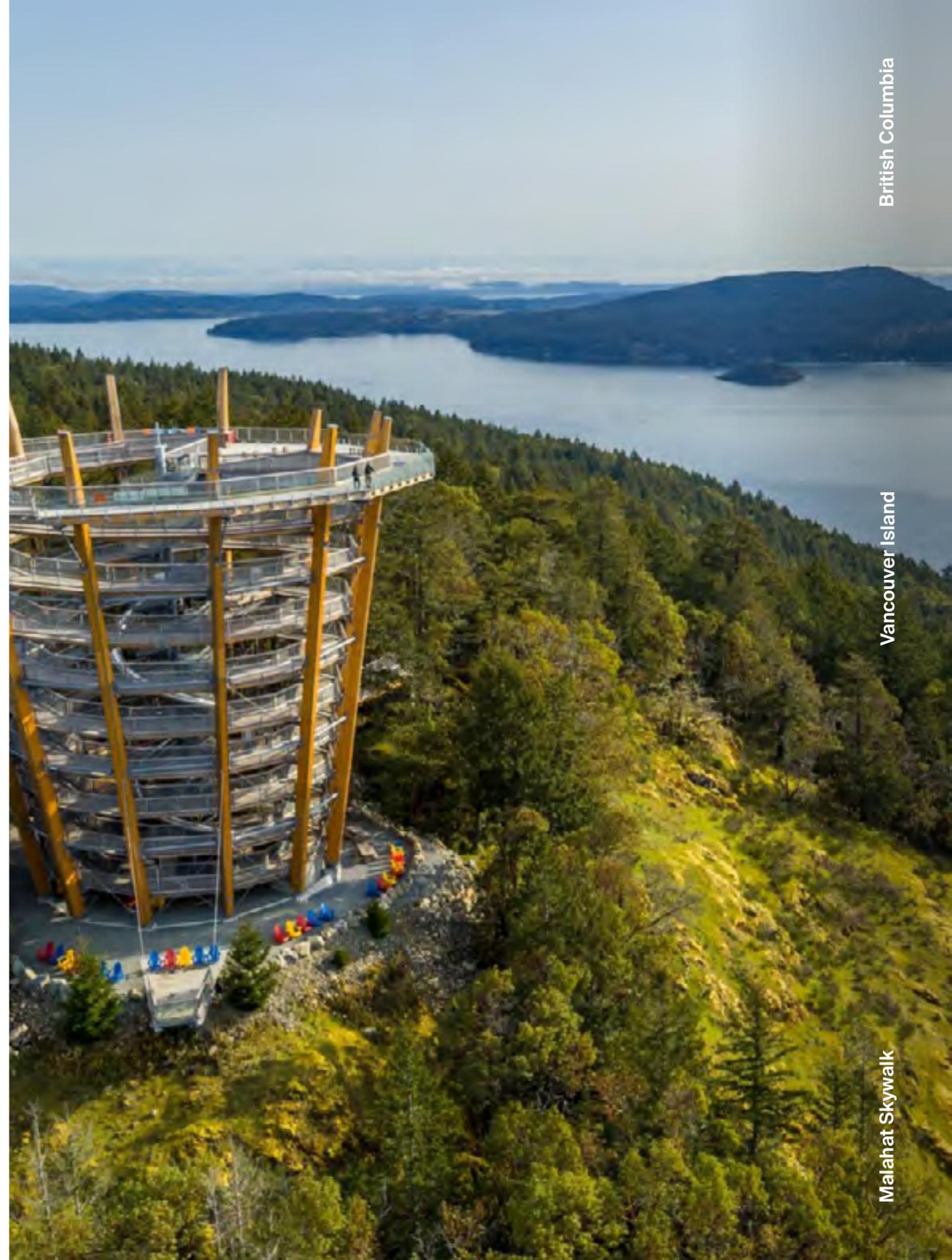
# DESTINATION DEVELOPMENT



## Industry renewal and investment

To attract target guests, Canada needs exceptional travel itineraries and experiences that reflect the essence of our country. To create them, we need to attract and influence strategic investments—from the private sector and all levels of government—that grow tourism in alignment with communities’ broader goals.

To this end, Destination Canada will work with communities and corridors to create long-term destination development strategies, and identify needed tourism infrastructure as well as the products, services, workforce, access, and experiences required to meet the expectations of visitors and the needs of local communities.



Destination Development

**KEY INITIATIVE 07**

**Lead corridor strategies to create legendary journeys**

**We will advance the development and enhancement of travel itineraries to drive demand, catalyze investments, and encourage longer stays.**

Tourism Corridors give target guests more ways and reasons to explore more of Canada and visit in different seasons. A Corridor can be defined two ways: as a geographic region connecting different destinations that have significant tourist attractions; or as a collection of experiences that a target audience desires. We call these corridors 'Legendary Journeys'.

In partnership with stakeholders, we will develop and enhance new and existing Tourism Corridors. This supply-side capacity planning helps Canada create alluring experiences for travellers who have thousands of competitive travel options across the globe—and then successfully manage the demand that Legendary Journeys creates.

**Actions:**

- Create strategic planning frameworks for tourism development corridors that produce Legendary Journeys



Twin Falls Lodge

Saskatchewan

“

**We're limited in our growth potential unless there's significant investment in infrastructure and tourism product development, including Indigenous tourism, which can attract visitors and promote cultural heritage.**

Keith Henry, CEO, Indigenous Tourism Association of Canada

”



The Forks

Winnipeg

Manitoba

Destination Development

KEY INITIATIVE 08

Support destination development expertise for the sector

We will facilitate collaboration to advance destination development in every region of the country.

Part of our role as destination stewards means facilitating networking and knowledge exchange among destination development professionals nationwide. We'll provide resources, research, tools, guidance, and specialized content to support, inform, and influence destination development efforts throughout the country.

By facilitating partnerships and dialogue between destinations and stakeholders, we will help destinations align their economic development efforts with broader regional, national, and international goals and tourism opportunities.

Actions:

- Inspire partners by sharing thought leadership in global destination development
- Support partners with destination development resources



Knowledge Hub

The Knowledge Hub is a platform for industry to share, discover and learn about all things Destination Development—including industry trends, best practices, and programs. You can access the hub [here](#).



Destination development must be a central strategy to stimulate and maintain visitor demand.

Brenda Holder, Owner, Mahikan Trails



Destination Development

**KEY INITIATIVE** 09

## Support policy and programs to improve access to capital and investment

### We will help drive investment in the tourism sector to support the development of existing or new destinations and experiences.

Growing investment in the sector is essential, and Destination Canada will collaborate with financial entities, sector associations, and governments to raise awareness of the unique financial challenges faced by tourism businesses, working with all levels of government to enhance the policy environment for entrepreneurship and investment attraction.

We'll work with regional tourism organizations, industry associations, investment-focused organizations, and other stakeholders to identify

investment opportunities and showcase them across the country. By raising awareness of opportunities that are aligned with a development strategy, we'll promote and cultivate domestic and foreign investments.

**Actions:**

- Understand barriers to public and private tourism investment in Canada
- Work with partners to identify and create awareness for investment opportunities in tourism
- Offer advice to government policymakers to advance investment in the tourism sector



East Point Lighthouse

Prince Edward Island

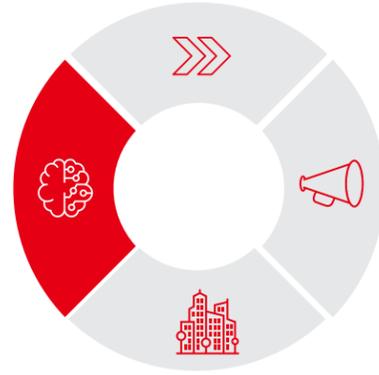
“

**Canada and Canadians stand to benefit tremendously from a strategic and substantial investment in tourism experience development.**

Ben Cowan-Dewar, Co-founder and CEO, Cabot

”

# COLLECTIVE INTELLIGENCE



## Data and insights to compete with the world

Information is essential to good decision-making, and we're using data, insights, and analytics to guide everything we do. This helps us perform better and provides valuable resources for partners, industry, innovators, investors, and governments. Becoming an insight-driven organization means we're better marketers, more successful in developing destinations, and more accountable to Canadians.

Collective intelligence strengthens our ability to compete globally by not only providing input for policymakers, but also helping us make smart decisions on the ground. Data about local communities helps potential investors and keeps a pulse on local sentiment about support for tourism. New customer-focused data gives us insights into our target guests, while supply-side data shows areas for growth.



Collective Intelligence

## KEY INITIATIVE 10

### Lead analytics to inform sector strategies and advise policymakers

**We will continue to leverage advanced analytics and insight to help the sector adapt and grow.**

To enhance sector competitiveness, we'll leverage data to make smarter decisions, strengthen strategic initiatives, and enhance communication efforts for better outcomes across industries. Through methods such as predictive modeling, deep machine learning, and data visualization, we can derive actionable insights that allow us to measure global competitiveness, develop evidence-based strategies, adapt to new market dynamics, and stay resilient in the face of future shocks.

**Actions:**

- Deliver timely analyses and forward outlooks on the Canadian tourism sector, our markets, and competition
- Advise on the global competitiveness of the sector through in-depth analysis and monitoring



## Collective Intelligence

**KEY INITIATIVE 11****Lead analytics with unparalleled demand- and supply-side tourism intelligence****We will enable our industry with intelligence and quickly deploy the power of artificial intelligence.**

The exponential power of generative artificial intelligence and large language models will fundamentally change how we use intelligence as a sector. Destination Canada is well-positioned to fully leverage this power for industry through the foundations we've built into the Data Collective. Together with our national NorthStar partners, we will deploy AI to re-imagine our go-to-market strategies, improve the traveller experience from end-to-end, and redefine success in our sector. By applying AI in strategic ways, we aim to set new standards for the industry and ensure that Canada remains a top competitor on the global stage.

Through integrated data partnerships, we're working to make the Canadian Tourism Data Collective Canada's most useful and visually-intuitive library of tourism data for public and private stakeholders—our cornerstone for driving sector innovation and enhancing our all-important competitiveness. We aim to understand what

makes people want to visit, what influences their travel choices, and how they behave as consumers. This deeper understanding of the demand helps us create specific and personalized marketing campaigns, boost customer engagement, and maximize the return on investment.

By assessing supply dynamics in a region—such as the mix of accommodation, experiences, labour pool, or transportation access and capacity—we can assess the strengths and weaknesses of destinations in Canada, find areas to improve, and prioritize where to focus development and investment efforts—all aligned with community aspirations.

**Actions:**

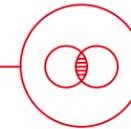
- Generate insights on travel demand, decision drivers, brand, and target guests for leisure and business events
- Build a comprehensive inventory of tourism assets and place-based opportunities across Canada

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**Knowledge is power. It's crucial to share research and insights – not only with our partners, but also with the industry at large. We're happy to continue collaborating with tourism's Team Canada**

Mario Péroquin, CEO, VIA Rail Canada

”

**Canadian Tourism Data Collective**

Canadian Tourism Data Collective is a [national platform](#)—centralized, accessible, and secure—for tourism data, research, and thought leadership. As a source of competitive advantage for Canada's hosting economy, it's a new way for industry, communities, and governments to gain reliable and actionable intelligence and drive collaboration. It stands as a centralized resource, while ensuring decentralized access with unparalleled ease. Importantly, innovators can use this powerful data resource to create new applications for the tourism sector.

**TourismScapes**

TourismScapes harnesses the power of geographic information systems (GIS) to provide localized intelligence on Canada's array of tourism assets, from coast to coast to coast. It will identify opportunities for investment and assess on-the-ground traveller experiences and gaps in order to strengthen the hosting economy.



Collective Intelligence

## KEY INITIATIVE 12

### Lead innovation in tourism performance measurement and monitoring

**We will pioneer tourism performance metrics for Canada at a local, national, and global scale.**

As we strive for transformative growth, we are at the forefront of pioneering innovative approaches to measure the impact of tourism, and this marks just the beginning of our journey. Through the implementation of new tools and measurement frameworks, we will provide industry partners and all levels of government with real-time insights and advanced analytics into the performance and impact of tourism initiatives. This forward-thinking approach ensures that we not only meet the evolving needs of our local stakeholders but also set new standards in international tourism measurement practices.

**Actions:**

- Measure the impact and contribution of tourism
- Measure the success of our brand, marketing programs, and destination development activities

# How You Can Unlock New Opportunities

## TOURISM BUSINESSES

### Collaborating for Competitiveness

Engage with industry leaders and associations and innovate and adopt technologies to stay competitive.

### Embracing Regenerative Practices

Embrace sustainability and inclusivity as part of your business objectives and adopt regenerative practices for long-term growth.

### Empowering Indigenous Tourism

Collaborate with Indigenous partners and explore opportunities to integrate Indigenous experiences.

### Crafting Meaningful Journeys

Make every encounter with our guests meaningful and memorable.

### Driving Demand

Align offerings with the values and aspirations of our target audiences to resonate with future/ repeat guests across different seasons.

### Capacity Building

Explore where your offerings can align with Legendary Journeys to capitalize on demand and build capacity, especially in Fall and Winter.

### Fostering Investment Opportunities

Stay informed on investment opportunities highlighted in your region to secure funding from economic development agencies and financial institutions for expansion or improvement projects.

### Using Data to Drive Your Decision-Making

Align business decisions with data-driven intelligence to ensure competitiveness and relevance with target audiences.

### Measuring Your Performance

Engage in data partnerships with DMOs to better understand the pulse of tourism in your area and share localized data.

## DESTINATION MARKETING ORGANIZATIONS

Convene the sector, accelerate innovation, and provide data-driven insights to policymakers.

Lead by example, share low-carbon pathways, support diversity and inclusion, and prepare the sector to respond to crises.

Wherever possible, work in collaboration with the Indigenous communities and organizations in your area to recognize and potentially integrate Indigenous experiences into your offering.

Align your messaging and product focus with Canada's brand positioning: open hearts, open minds, open spaces.

Explore where you can tailor marketing efforts to resonate with the values of discerning leisure and business travellers, and consider your communications with event decision-makers who connect with Canada's values.

Participate in the creation of Legendary Journeys, to attract diverse audiences and amplify the appeal of different regions.

Stay on top of private and public investment opportunities and ensure local financial institutions understand the value of tourism in your destination.

Dive into the wealth of spatial data now available to gain localized insights into tourism assets.

Align your key performance indicators (KPIs) with national benchmarks where relevant to identify successful strategies and areas for improvement.



# WORKING TOGETHER

Fogo Island

Newfoundland and Labrador



Remai Modern

Saskatoon

Saskatchewan

We all play for Team Canada. Over the past five years, private sector, industry stakeholders and governments at all levels have grown our capacity to work together, influence our sector, and generate stronger results. Now that ability is more important than ever. Together, we have the power to shape the conditions that drive Canada's global competitiveness by 2030.

## Ministerial Tourism Council

In July 2023, the new federal tourism growth strategy – *Canada 365. Welcoming the World. Every Day.*— announced a new cross-government strategy table for coordinating tourism-related policy amongst federal ministers. By better coordinating policies and strategies across government, the Ministerial Tourism Council is an opportunity to more effectively and efficiently support the vitality, profitability and competitiveness of our sector. Federal coordination and policy coherence across multiple ministries will help drive better return on investment (ROI) for the government, more benefits for Canadians, and a healthier sector.

## NorthStar

NorthStar is a national forum for destination marketing and management organizations—provinces, territories, major cities and resorts and two key national associations—that is dedicated to improving the competitiveness of Canada’s tourism sector. Destination Canada and Northstar partners have come together as a unified Team Canada over the past several years, which has been pivotal to aligning marketing strategies and major investments in key markets, recapturing lost demand and accelerating desperately-needed economic recovery. Looking ahead, we will strengthen our collaboration and drive a common agenda to align key stakeholders, strategies and budgets around Canada’s competitiveness, provide advice on tourism-supportive policies, address structural challenges, prepare for disruptions, and plan for long-term economic growth. Together, we will be destination stewards for Canada.

## National Tourism Sector Associations

Many national associations are directly or closely aligned with tourism—in transportation, hotels, hospitality, arts, culinary, and cultural industries. As centralized bodies for advocacy, education and networking, they create partnerships, influence policy, set industry standards, and support professional development. They play a critical role in informing our collective strategy to increase Canada’s global tourism competitiveness, realize our shared ambitions, and foster Canadians’ support for our sector.

## Industry Stakeholders

There are some 234,000 tourism businesses in Canada, of which the vast majority are Small and Medium Enterprises. We rely on their invaluable expertise to be part of advisory committees (e.g. Leisure, Business Events and Research Advisory) and working groups (e.g. Destination Development, Communications). We will continue to drive widespread collaboration between public and private stakeholders to leverage their strengths and bridge gaps. We will also strengthen efforts to communicate with Small and Medium Enterprises (SMEs) and Destination Marketing Organizations to share our strategies and support development across Canada.



Yukon

“

**Regions need to work together, instead of competing, by combining their resources and strategies for mutual benefit.**

John Wilson, President and Chief Executive Officer, The Wilson’s Group

”

# MEASURING OUR PROGRESS

Nunavut



Tidal Bore Rafting Resort

Truro

Nova Scotia

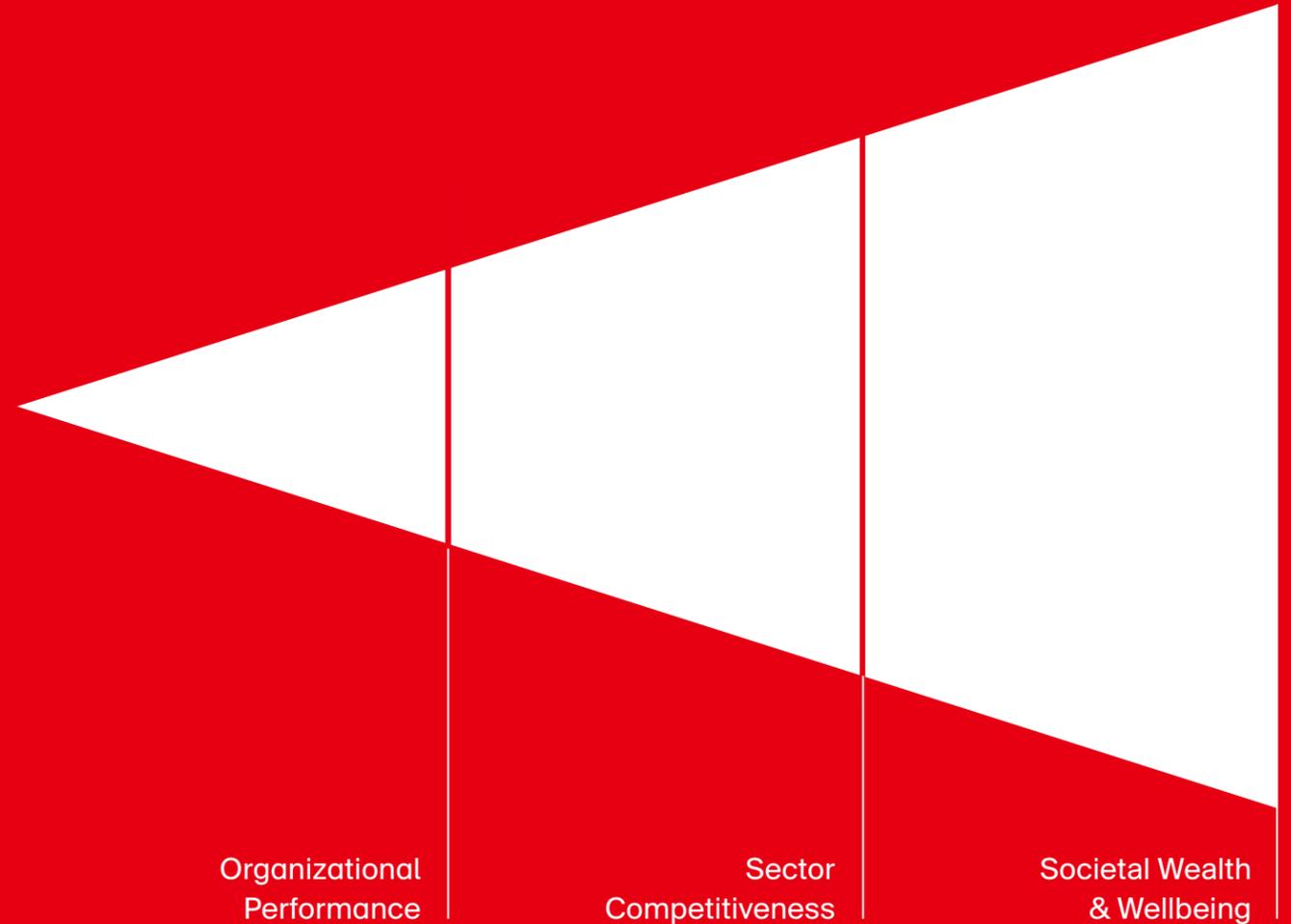
# A MULTI-LEVEL MEASUREMENT FRAMEWORK

It's Destination Canada's goal to help grow a vibrant tourism sector and reach \$160 billion in revenue by 2030 while setting the foundations for greater resilience. Measuring and evaluating our progress will be a key part of implementing *A World of Opportunity*.

A new, transformational trajectory means new ways to measure progress. We will follow a holistic, integrated measurement framework with three distinct layers: the first will assess the performance of Destination Canada's operations (Organizational Performance); the second tracks the global competitiveness of the Canadian tourism sector (Sector Competitiveness); and

the third set of metrics will assess the overall contribution of tourism by measuring the economic, socio-cultural, and environmental benefits for Canadians through a new national Wealth & Wellbeing Index (Societal Wealth & Wellbeing).

In all three of these areas, the Canadian Tourism Data Collective will serve as an invaluable tool for all stakeholders to access national tourism data. This centralized platform allows the sector to track changes across a wide range of measures, and assess the effectiveness of actions and investments over time.



# MEASURES

## Organizational Performance

To evaluate effectiveness, we have established ambitious goals up to 2030. Annually, targets are established in Destination Canada's Corporate Plan for government, and published on our corporate website. These will align with the Strategy's goal of transformative growth—

enhancing tourism's economic contribution to \$160 billion in revenues by 2030. This growth will bolster Canada's global competitiveness, which in turn helps create wealth and wellbeing for all of Canada and enrich the lives of our guests. Destination Canada will also monitor key measures to assess our progress in delivering on our Strategic Drivers: Sector Advancement, Brand Leadership, Destination Development, and Collective Intelligence.

STRATEGIC DRIVERS	OUTCOMES	2030 TARGET
<b>Overall</b>	→ By 2030, Canada's tourism industry has been transformed.	→ Canada's tourism industry will reach \$160 billion in revenue by 2030.
<b>Sector Advancement</b>	→ By 2030, sector-wide collaboration strengthens tourism support, propelling Canada to the forefront of global competitiveness.	→ Canada will rank in the Top 7 in the World Economic Forum Travel and Tourism Development Index (WEF TTDI)
<b>Brand Leadership</b>	→ By 2030, Canada is recognized as an open and welcoming destination, captivating visitors and business decision-makers alike.	→ Canada will rank in the top 3 destinations for consideration and recommendation by our target audiences in our key markets.
<b>Destination Development</b>	→ By 2030, tourism experiences and products elevate Canada's capacity to meet demand.	→ Investment in tourism will increase by an average of 4% from \$6.9B in 2022 to \$9.5B in 2030.
<b>Collective Intelligence</b>	→ By 2030, Canada uses privileged tourism insights to outperform competitors.	→ The Canadian Tourism Data Collective will maintain a 90% retention rate among key industry partner subscribers (e.g. major Provincial/Territorial/ Destination Marketing Organizations).

# MEASURES

## Sector Competitiveness

Destination Canada's previous strategy *Canada's Tourism Renaissance* focused on revenue recovery in the short-term (2022-2025) and set the stage for our post-recovery strategy, *A World of Opportunity*, to propel industry growth and greater resilience in the longer term (2024-2030). For the tourism sector to shift from short-term recovery to transformative growth, we have set a collective ambition to rank within the Top 7 most competitive in the world according to the WEF Travel & Tourism Development Index within 7 years.

We will do this by activating 7 key levers that were prioritized as having the most influence on tourism competitiveness. These are: Revenue and Yield, Brand Leadership, Investment, Access, Workforce, Sustainability and Public and Policy Support.

Improving Canada's competitiveness requires a full Team Canada effort. As a convening force for the tourism sector, we'll support the activation of the levers and work with partners and governments at all levels to make Canada one of the most competitive and desirable destinations in the world.



**We believe Canada can become a Top 7 global destination, within 7 years, through 7 primary levers.**

## 7 Levers for Improved Competitiveness

- 

**Revenue Yield Growth**

Grow demand for seasons and places where Canada has capacity; focus on yield in peak periods.
- 

**Brand Leadership**

Invest in Canada's global brand to inspire travellers to choose Canada.
- 

**Investment**

Attract investment and enable re-investment in Canada's tourism assets and infrastructure.
- 

**Access**

Increase access (to and within Canada) and streamline border processes.
- 

**Workforce**

Increase labour supply and productivity and accelerate digital transformation.
- 

**Sustainability**

Embrace regenerative principles (Economic, Sociocultural, Environmental) to ensure tourism flourishes.
- 

**Public & Policy Support**

Deepen Canadians' pride in their home and love for hosting visitors. Share expert advice and insights that create a policy environment where tourism thrives.

# MEASURES

## Societal Wealth & Wellbeing

The reason we come to work every day is to help tourism generate wealth and wellbeing for all of Canada and enrich the lives of our guests. As stewards of our destination, we work to ensure tourism yields net positive economic, sociocultural, and environmental benefits for all. To measure our progress toward this aspiration, we developed a new, more comprehensive framework—the Wealth & Wellbeing Index.

This is not just about the money made from tourism. It's about understanding and enhancing the overall impact tourism has on our communities and landscapes. The old ways of measuring tourism's success—looking at how much tourists spend, how many arrive, or how full our hotels are—only tell part of the story. We need to see the bigger picture: How does tourism contribute to our society and environment? Does it make Canada a better place to live, work, and visit? At Destination Canada, we are adopting a broader perspective on progress to include our communities' wellbeing and our environment's sustainability.

Developed in partnership with the industry, the Wealth & Wellbeing Index uses a systems-oriented approach to examine tourism indicators

across multiple dimensions, collecting information on key focus areas grouped into 6 areas: Economy, Employment, Enablement, Environment, Engagement, and Experience. Measuring the state of the industry more holistically allows us to celebrate where we excel and identify where we can do better.

The Index serves as a guidepost for every tier of the tourism industry, from national strategies to provincial and territorial initiatives, and it's designed to eventually extend its insights to the community level in future iterations.



### Beyond GDP

In creating the Wealth and Wellbeing Index, we drew inspiration from leading global and national benchmarks to gauge the economic, social-cultural, and environmental impacts of tourism. This work is built on the pillars of the UN's Sustainable Development Goals, Canada's Quality of Life framework, and Principles of a Regenerative Economy.

## Wealth & Wellbeing Index

### INDICES

### KEY TOURISM SECTOR INDICATORS

#### Economy

Economy measures tourism business growth, innovation, investment, and resilience, as well as the wealth generated for communities.

- Tourism GDP
- Private and public investment

#### Employment

Employment studies the overall image, access, and inclusivity of the industry, including the local supply of skilled workforce and the development of supporting policies.

- Tourism employment
- Tourism job vacancy rates

#### Enablement

Enablement reflects a destination's capacity to host visitors based on its built environment, the quality of the infrastructure and the access to public services, plus the supporting conditions.

- Connectivity Index (air/rail/ground)
- International openness

#### Environment

Environment tracks the impact of tourism on the ecosystem and the protection of natural resources.

- GHG Emissions per visitor

#### Engagement

Engagement celebrates the local culture and heritage, and Indigenous cultures.

- Canadian perception of tourism's contribution to quality of life
- Canadian perception of tourism's contribution to the economy

#### Experience

Experience benchmarks a destination's brand and overall value, as expressed by the quality and competitiveness of the visitor experience.

- Canada is recommended by target audiences
- Quality of tourism experiences

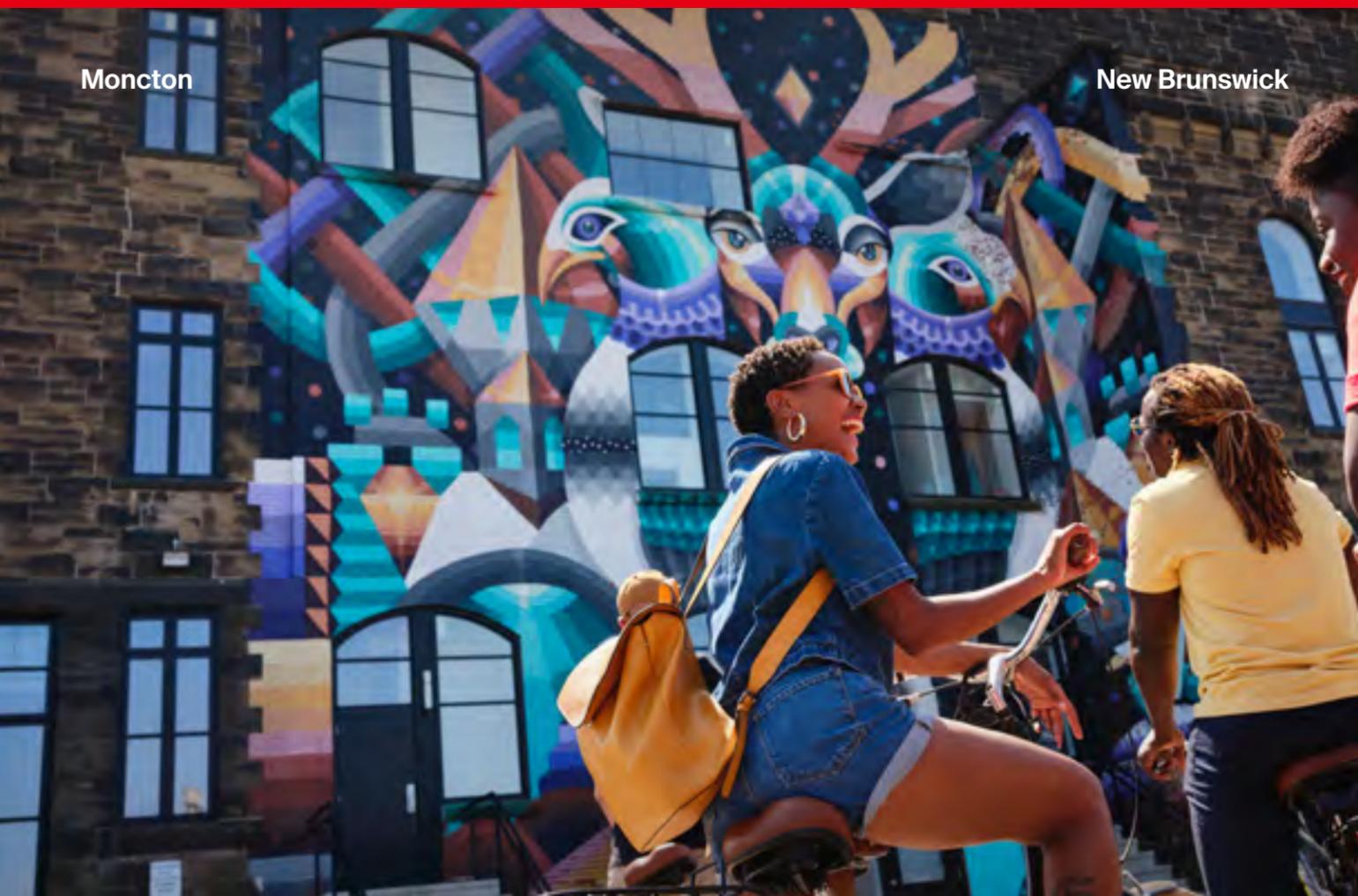
# TOURISM 2030: A WORLD OF OPPORTUNITY



Ottawa Convention Centre

Ottawa

Ontario



Moncton

New Brunswick

# OUR PATH FORWARD

**We envision a future where Canada is known and respected as a global leader in tourism. Where together, we are stewards of the destination we call Canada.**

*A World of Opportunity* is a leap into a transformative future where Canada's tourism sector truly thrives and prospers, outpacing our general economy and our competitors. It's a future where a new lens of regenerative principles guides our growth, improves our resilience, and garners strong support from Canadians.

It's a future when tourism positions Canada in the world, bolstering our identity as a people and as a place to visit, live, and do business.

We are committed to measuring tourism's contribution to the wealth and wellbeing of all Canadians, ensuring that the benefits of a thriving tourism industry are felt across the country.

Together, we'll grow interest in visiting Canada, ensuring a more sustainable and balanced tourism landscape, strategically targeting and geographically dispersing guests to expand seasonality and provide local opportunities. Together, we'll increase public support for tourism, fostering pride and engagement among Canadians.

Collaboration forms the bedrock of our strategy, and your partnership is pivotal to its success. Join us on this journey towards a sustainable, prosperous, and globally competitive tourism sector that benefits our communities, businesses, and all Canadians.

We're excited to work alongside you to bring Canada's tourism future to life.

# WORK WITH US



Together with our industry partners, we are embarking on the next era of travel and tourism. Our new strategy will take us there together. We invite you to work with us.

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