CANADA’S TOURISM VISION:
ONE YEAR OF PROGRESS
On May 11, 2017, the Honourable Bardish Chagger, Minister of Small Business and Tourism and Leader of the Government in the House of Commons, launched Canada’s Tourism Vision. It’s a five-year, whole-of-government approach to increasing the number of international tourists who come to Canada by seizing the global opportunity that tourism offers.

World-class tourism

In 2017, Canada had its best year ever for international visitors coming to Canada.

Canada’s tourism sector is truly world-class. Every day, tour operators, retailers, hoteliers, restaurateurs—the overwhelming majority of whom are small business owners—welcome thousands of tourists from around the world. Canada extended a warm welcome to 20.8 million visitors from around the world in 2017, and revenue from those international visitors topped $21.3 billion. Canada was also recognized internationally by The New York Times, Lonely Planet, National Geographic Traveler and other influential travel media as the top spot to visit in 2017.

Supporting the middle class

Tourism is a major driver of Canada’s economy, bringing value to Canadian communities from coast to coast to coast. In every region of the country, tourism supports jobs and opportunities for Canada’s middle class. Some quick facts:

- Tourism is our largest service export and represents more than 2% of our GDP.
- One in 10 Canadian jobs—almost 1.8 million—depends on the tourist economy.
- Tourism is our number one employer of youth and is an important provider of employment for new Canadians.
- 99.9% of the tourism sector is comprised of small and medium-sized enterprises.
- Total tourism revenues from domestic and international travellers were $97.4 billion in 2017.

Tourism goals

Canada’s Tourism Vision is guided by three overarching goals that will strengthen the industry and create prosperity and jobs:

1. The number of international overnight visits to Canada will increase by 30% by 2021.

Visitation is up by 4.4% from 2016. In 2017, Canada welcomed a new record high of 20.8 million overnight arrivals by non-residents.

2. The number of tourists from China will double by 2021.

In 2017, Canada welcomed a record number of Chinese visitors, an increase of 11.8% from 2016. Preliminary numbers show that more than 680,000 Chinese tourists came to Canada in 2017.

3. Canada will compete to be one of the top ten destinations in the world by 2025.

In 2017, The New York Times, and Lonely Planet and the National Geographic Traveler recognized Canada as a top international destination. Condé Nast named Victoria the second-best small city on earth outside the U.S. In 2018, Saskatoon was named a top city to visit by The New York Times.

Canada will achieve these goals by making strategic tourism investments in the areas of marketing, access and product. Now, one year after releasing Canada’s Tourism Vision, the Government of Canada, under the leadership of the Right Honourable Justin Trudeau, has made substantial progress towards these goals. Thanks to collaboration throughout the federal government, as well as with Destination Canada, the provinces and territories, and the many hard-working small business owners who welcome international visitors, Canada is well on its way to achieving Canada’s Tourism Vision.

Progress on all 20 of Canada’s Tourism Vision action items are outlined below.
Marketing is the key to attracting tourists to Canada. To build on Canada’s strong international brand and to get the word out to priority markets, we promote Canada’s many tourism destinations and attractions in a variety of ways, including experimenting with those that are new and innovative. As such, Canada’s Tourism Vision contains four action items to enhance and improve how Canada is marketed as an international tourist destination throughout the world.

Results one year later

Thanks to stabilized funding of $95.5 million provided in Budget 2017, Destination Canada continues to raise Canada’s profile internationally. This Crown corporation—which markets Canada abroad as a tourism destination—leverages social media platforms and domestic and international trade shows as well as innovative marketing campaigns in key markets around the world.

The U.S. leisure travel market remains a priority—that’s why the Connecting America campaign was created. Destination Canada’s fully digital platform delivered individualized content to prospective American travellers, creating more than 11 million social media engagements linked to the Connecting America campaign and building strong partnerships with influential U.S. media brands. These marketing efforts contributed to a 3.1% growth in arrivals from the U.S. over 2016. Preliminary estimates suggest that in 2017, Canada welcomed 14,328,645 tourists from the U.S. Critically, Connecting America was a key driver in the increase in U.S. air travellers—who visit for longer and spend more per visit—by 6.6%.

The Millennial Travel Program, which gave Canadian and international millennial travellers a chance to explore our country, far surpassed its goals. It reached 7.3 million Canadian millennials in 2017, far exceeding the program’s goal of 4.4 million, and increased travel by millennials by 16%, more than tripling the targeted 5%. Destination Canada also extended this program to attract millennials in key foreign markets. It reached an audience of 300 million and generated 250,000 leads to partners to remarket specific tourism offerings and convert the lead to a visitor.

Throughout 2017–2018, Destination Canada also continued to harness the power of digital technologies to improve its marketing efforts. Through its North Star 22 partnership with provincial, territorial and municipal marketing organizations, and in partnership with Statistics Canada, Destination Canada embarked on a project to better understand how and where international visitors spend money in Canada and how to better segment its target audiences.

Destination Canada announced eight new signature experiences in 2017. These unique new experiences highlight Canada’s history and culture as well as adventurous Arctic experiences in Canada’s North. The Canadian Signature Experiences program has grown to over 200 members.

**NEW CANADIAN SIGNATURE EXPERIENCES**
- Exploring a Canadian Landmark with the Canadian Museum for Human Rights (Manitoba)
- Museum Grand Tour with the Canadian War Museum (Ontario)
- Railtown Urban Eats Tour with Off the Eaten Track (British Columbia)
- Winter Arctic Discovery with Inukpak Outfitting (Nunavut)
- Arctic Circle Tour with Nature Tours of Yukon (Yukon)
- Canadian Arctic Reindeer Signature Package with Tundra North Tours (Northwest Territories)
- Agawa Canyon Tour Train (Ontario)
- Canyon Sainte-Anne (Quebec)
Cost, travel time, and ease of access to a destination all have an effect on trip planning—and on travellers’ experiences and perceptions of Canada. The Government of Canada is working to make Canada easier to access for international travellers. Canada’s Tourism Vision includes six action items to help improve and streamline how visitors get to enjoy our country.

Results one year later

The Government of Canada took action in 2017 to improve the entry process for travellers. The visa application centre network now consists of 137 centres in 95 countries. To better serve Chinese tourists and in preparation for the 2018 Canada-China Year of Tourism, the Government opened seven new visa application centres in China in 2017.

Meanwhile, expansion of the Electronic Travel Authorization (eTA) program was implemented. As of 2017, travellers who have held a temporary resident visa in the past 10 years or who hold a valid United States non-immigrant visa from Mexico, Brazil, Bulgaria and Romania now require an eTA to enter the country, instead of a visa. The visa requirement for Bulgaria and Romania was lifted in December 2017. These changes in policy have enabled a significant increase in the number of tourists from Mexico (47.4% increase over 2016), Brazil (22.0% increase over 2016), Romania (8.5% increase over 2016) and Bulgaria (2.6% increase over 2016).

Canada continues to increase air connectivity opportunities to key tourism markets through the ongoing negotiation of air transportation agreements. In 2017, Canada concluded expanded agreements with Ethiopia, Israel, Morocco, Qatar, Thailand and South Africa. A first-time agreement was also negotiated with Cameroon. Discussions are ongoing with China in order to ensure that demand can be met. For a comprehensive list of concluded agreements and further information on the Blue Sky Policy, please visit www.tc.gc.ca/bluesky.

The Government of Canada has also worked to improve the permit experience in Canada’s Arctic for cruise ship companies via a multi-partner initiative to clarify and provide guidance to operators on what they must do and should do when operating in Canada’s Arctic. Transport Canada coordinated and led a working group that included the cruise ship industry, Canadian operators, Arctic community members, federal and territorial governments, land claim partners, academia and non-governmental organizations to develop guidelines and best practices for cruising in Canada’s Arctic. The goal is to help operators proactively plan for and meet permit requirements and include best management practices that Arctic communities want operators to adhere to when visiting.

In 2017, Employment and Social Development Canada (ESDC) ran a consultation on making Canada more accessible. The Canadian Transportation Agency consulted with Canadians on accessible transportation specifically. Tourism stakeholders such as air carriers, ferry companies and railway companies were consulted. These consultations will inform a set of modernized, comprehensive regulations to support travellers with disabilities that will make the federal transportation network more accessible. Legislation is expected to be introduced in the coming months.

In addition to opening seven new visa application centres in China, in preparation for the 2018 Canada-China Year of Tourism, Immigration, Refugees and Citizenship Canada implemented a Chinese payment option to facilitate the visa application process for Chinese tourists to Canada.
Canada has incredible experiences and attractions to offer the world. In a competitive global market, Canada continues to innovate. Tourists seek authentic experiences, and Canada’s tourism sector works tirelessly to keep our products and services up to date and exciting. There are 10 actions under Canada’s Tourism Vision that support the development of new and innovative Canadian tourist products.

**Results one year later**

The Government of Canada has worked with the Indigenous Tourism Association of Canada (ITAC) to expand Indigenous tourism by allocating $8.6 million in Budget 2017. Over the past year, some of ITAC’s achievements include aligning ITAC’s marketing efforts with Destination Canada, providing development funding to 65 Indigenous businesses to help them to reach a market-ready state, establishing agreements with four provinces to develop Indigenous tourism associations, hiring four Indigenous tourism coordinators, implementing capacity developing programs, and developing and promoting Indigenous experiences at Parks Canada places. A high point of ITAC’s year was when 32 Indigenous tourism businesses participated in Rendez-vous Canada 2017 in Calgary. ITAC also entered into a three-year agreement with Destination Canada to increase marketing investments in key international markets and support Indigenous operators at Showcase Canada Asia.

Federal government funding has supported LGBTQ2 representation at trade shows like Rendez-vous Canada 2017 for the first time since it was established over 40 years ago. This resulted in 34 international tourism organizations agreeing to add Canadian LGBTQ2 products or activities to their portfolio. Government support also facilitated six inclusion training sessions in 2017 across the country. Those sessions resulted in over 140 LGBTQ2-certified “inclusive” businesses.

As part of Canada 150, Canada’s national parks, historic sites and marine conservation areas offered free admission for all visitors in 2017. 8.5 million Discovery Passes were distributed, resulting in 27.2 million visits—an increase of 11% compared to 2016. The overall economic impact of Parks Canada in 2017 translated into more than 35,000 jobs and contributed more than $2.8 billion to Canada’s GDP. Discovery Passes were distributed within Canada and also to 160 countries worldwide. International visitors to Parks Canada places in 2017 spent $1.78 billion in Canada, which represents $100 million more than in 2016. This success led to the Government announcing permanent free admission to all Parks Canada sites for youth 17 and under starting in January 2018. Additionally, one-year passes will also be provided free of charge through the Cultural Access Pass program for new Canadian citizens.
In November 2017, Minister Chagger announced that work is under way to deliver a report on options for the development of a national culinary tourism strategy, to be released in summer 2018. This serves as the first building block to develop Canada’s culinary tourism strategy and the first step in exciting work to better market Canada's culinary offering to potential visitors from around the world.

In February 2018, the Francophone Heritage, Culture and Tourism Corridor was launched. This new tourism website and mobile app showcases more than 150 Francophone heritage and cultural topics in all provinces and territories. It provides an innovative and engaging classification of French-language services and showcases the cultural and linguistic uniqueness of Canada’s Francophone population to visitors.

Showcasing and supporting Canada’s creative works and artists globally is a catalyst for generating interest from tourists to attend cultural events while in Canada, and will generate further interest in discovering Canada as a destination of choice. Through a two-year, $35 million investment, Canadian Heritage, in collaboration with Global Affairs Canada, supported creative industries’ ability to expand their international reach. This includes securing resources on the ground in key markets to support creative industries and promote Canada’s culture and artists.

The Atlantic Growth Strategy was released in 2017. The federal and provincial governments are uniting to showcase our regionally diverse offerings across the country. On July 11, 2017, federal ministers and the four Atlantic premiers announced a joint investment of $24.5 million aimed at positioning Atlantic Canada as a top destination in the global tourism sector, creating more jobs and giving a boost to small and medium-sized businesses. This includes the Atlantic Canada Agreement on Tourism, a three-year, $19.95-million federal-provincial-industry marketing partnership that pools resources to promote the four Atlantic provinces as leading vacation destinations in key markets.

FedNor’s Prosperity and Growth Strategy for Northern Ontario commits to supporting the development of new Indigenous business networks and skills development initiatives in key sectors, particularly mining, forestry, tourism, agriculture, and arts and culture.

In an effort to prepare the tourism sector for the Canada-China Year of Tourism, ISED and Tourism HR Canada created a training resource that help businesses in the industry better serve Chinese visitors. Theemerit factsheet “Welcoming International Visitors – Canada-China Year of Tourism 2018” was made free of charge for all Canadian tourism operators for 2018.

Canada aims to support skills development as a core element of the government’s plan to support Canada’s middle class by investing in tourism jobs and skills training. The Youth Employment Strategy (YES), administered by Employment and Social Development Canada (ESDC) is an important element of the strategy. The YES helps young people, particularly those facing barriers to employment, get the information and the skills, work experience and abilities they need to make a successful transition into the labour market. The Canada Summer Jobs (CSJ) program through the YES creates opportunities for Canadian youth including in the tourism sector. Budget 2018 provided additional YES funding to support the continued increase of the number of job placements funded under the CSJ Program in 2019-20 and the renewal of the Youth Employment Strategy.

Additionally, the Temporary Foreign Worker (TFW) Program allows Canadian employers to hire foreign nationals fill temporary labour and skills shortages when qualified Canadian citizens or permanent residents are not available. It is jointly led by ESDC and Immigration, Refugees and Citizenship Canada (IRCC). In April 2017, as part of the Path Forward for the TFW Program, the Government of Canada announced that it would undertake reviews of five sectors, including Tourism, that are heavy users of the Program.

Last but not least, the Government of Canada is actively taking steps to improve data collection. The Visitor Travel Survey was recently expanded, and data for the Air Exit Survey is now starting to be collected at 11 international airports. Statistics Canada also developed new products to help gather reliable, clear and comprehensive data to support evidence-based decision making in the Canadian tourism sector.

1. Owned and operated by First Nations sisters, Ontario’s Osha Osha provides stand-up paddle board lessons, tours, and yoga. ITAC provided a micro-grant that helped Osha Osha buy a trailer and train their staff, allowing the company to expand its business and client base. The support also included training for First Nations youth, which has added more tours to the schedule.

2. Grey Eagle Resort & Casino, located in Calgary and owned by Tsuu T’ina First Nation, has become a state-of-the-art events centre, hotel, and conference facility. The Government helped Grey Eagle work with new Chinese buyers through show subsidies to attend Showcase Canada Asia, and ITAC hosted an event for 100 Chinese buyers at the Grey Eagle Resort during 2017 Rendez-vous Canada. As a result, Grey Eagle Resort & Casino filled more than 1,750 room nights in 2017 and is projecting 5,000 room nights to be filled in 2018.

3. Tundra North Tours, owned by Kylik Kisoun Taylor, an Inuvialuit/Gwich’in, takes visitors on a range of summer and winter expeditions in the Northwest Territories and Yukon. Government funding helped Tundra North Tours attend multiple marketplaces including Rendez-vous Canada and Showcase Canada Asia throughout 2016 and 2017, as well as host international media and buyers from around the world on familiarization tours in 2018. As a result, Tundra North Tours has been able to secure contracts with international distributors, which have resulted in their experiences being available for purchase across Canada, the U.S., China, Europe and Australia.
After a record-breaking 2017, strong growth is expected in 2018 as the Government of Canada continues to work to achieve Canada’s Tourism Vision. Throughout 2018, the Government of Canada will work with the tourism sector on key initiatives that will build on progress to date, such as:

- Celebrations for the Canada-China Year of Tourism will take place in Canada and China leading up to the closing ceremony series to be hosted by Canada in China. Minister Chagger will lead a federal-provincial-territorial tourism business mission to China.

- In anticipation of greater number of Chinese visitors, Budget 2018 allocated $11 million to support the tourism sector by developing market readiness tools and training that will be deployed in rural and remote parts of Canada.

- The Government will develop options for a national culinary tourism strategy, in partnership with the tourism sector.

- Support for LGBTQ2 tourism will be further reinforced through training opportunities and participation at trade shows and events.

- The Government of Canada will contribute $500 million toward a new $1-billion Nature Fund. The Nature Fund will secure private land, support provincial and territorial species protection efforts, and help build Indigenous capacity to conserve land and species for our benefit and the benefit of future generations.

- To ensure consistent and effective security screening of travellers and workers, Budget 2018 proposed $236.4 million in 2018–19 to the Canadian Air Transport Security Authority (CATSA). This funding will also allow CATSA to add new lanes for U.S. pre-clearance of passengers at the Billy Bishop Toronto City Airport and the Quebec City Jean Lesage International Airport.

- Data collection through the Air Exit Survey for the Visitors Travel Survey will be expanded to two additional airports in 2018: St. John’s, Newfoundland and Billy Bishop in Toronto, Ontario.

- To support tourism sector jobs and skills training, ESDC administer the Youth Employment Strategy and the Temporary Foreign Worker Program. ESDC is currently leading consultations with stakeholders. The results will be used to inform the development of potential measures to address labour challenges in this sector.

- Destination Canada will be doing a research project that will focus on providing an assessment of the Canadian tourism sector’s competitive positioning, with an emphasis on opportunities and constraints, and recommending actions required for the sustained success of the tourism sector over the long term.