2024

DESTINATION CANADA

TOURISM'S WEALTH & WELLBEING INDEX

A New Way to Measure Tourism's Impact in Canadian Communities

Brudenell Riding Stables, Prince Edward Island

Land Acknowledgment

We at Destination Canada acknowledge the Indigenous Peoples of all the lands that we play, work and live on. From coast to coast to coast, we acknowledge the territories of the Inuit, Métis, and First Nations peoples who are the original and enduring hosts of these lands, calling this place home since time immemorial.

We do this to reaffirm our commitment to and responsibility for improving relationships between nations, including growing our own understanding of local Indigenous peoples and their cultures. As storytellers and representatives of Canada's tourism sector, we recognize our position of influence and the importance of recognizing and reflecting the many voices and places of these lands.

The Wealth & Wellbeing Index was developed in collaboration with Resonance Consultancy.

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CHAPTER 01

PREFACE

Han Wi Moon Dinner, Saskatchewan

CEO Foreword

Dear Canada,

I am excited to introduce you to the Wealth & Wellbeing Index. This innovative tool marks a significant step forward in how we understand and enhance the impact of tourism in Canada. Over the past few years, our industry has faced numerous challenges, but we have emerged with a renewed commitment to creating a tourism sector that benefits everyone—residents, visitors, and the environment.

Tourism needs a new yardstick to measure its true value, one that goes beyond traditional economic metrics and includes social and environmental impacts. Measures of success are evolving globally—from the United Nations' Sustainable Development Goals to the Quality of Life indicators adopted by the Canadian Government. Tourism must change too. The Wealth & Wellbeing Index is a comprehensive measurement framework that goes beyond traditional metrics like tourist spending and hotel occupancy. It examines how tourism affects our communities, environment, and overall quality of life. This framework includes indicators that capture the broader economic, social-cultural, and environmental impacts of tourism.

This Index is an invitation to the industry to look at tourism differently. Embrace this comprehensive measurement framework to gain deeper insights into our sector's performance. Join us in shaping a tourism industry that prioritizes sustainability, inclusivity, and community enrichment. Tourism is more than just an economic activity; it's a powerful force that impacts our society, culture, and environment in profound ways. The true value of tourism extends beyond financial metrics, encompassing the enrichment of communities, the preservation of cultural heritage, and the promotion of sustainable development.

The Wealth & Wellbeing Index will provide timely insights into the changing landscape of tourism. It is designed to help you understand key takeaways and trends, highlighting areas where we excel and where we can improve. Alongside this report, the Index is available through the Canadian Tourism Data Collective.

Our efforts outlined in the Wealth & Wellbeing Index are integral to delivering our strategy Tourism 2030: A World of Opportunity, which aims to position Canada as a champion of regenerative approaches to tourism growth and development. We envision a tourism industry that not only thrives economically but also leads in social and environmental responsibility. The Index ensures that every step we take is measured, purposeful, and impactful.

This report is the first step in helping you understand the Index and its components. Our goal is to familiarize you with the framework and share some fascinating new trends about both the performance and perception of Canada's visitor economy. The next phase will be bigger, and we want you to join us on this journey to becoming better stewards of our industry, creating wealth and wellbeing for all of Canada and enriching the lives of our guests.

Thank you for joining us. Together, we can build a brighter future for Canadian tourism.

Warm regards,

Marsha Walden
CEO, Destination Canada

Yukon River Tours, Miles Canyon, Yukon

What You Will Find in This Report

This report introduces the Wealth & Wellbeing Index and provides an overview of how the tourism sector is performing across six key sub-indices, highlighting key trends, insights, and regional strengths. Here's what you'll find in each section:

Approach Page 7

Discover the purpose and methodology behind the Wealth & Wellbeing Index. This section outlines how the Index expands beyond traditional tourism metrics to provide a broader view of tourism's impact on communities, the environment, and economic resilience.

Key Insights Page 12

Explore key insights highlighting historical trends and regional performance across each sub-index and category.

Canada Profile Page 17

Gain an in-depth view of Canada's performance with detailed insights into key areas within each category of the Wealth & Wellbeing Index: economy, employment, enablement, environment, engagement, and experience.

Provincial & Territorial Profiles Page 25

Explore the unique strengths and development opportunities across each province and territory. This section highlights regional initiatives, from Alberta's impressive tourism investment growth to Saskatchewan's high business survival rate, showcasing the diverse and robust nature of Canada's tourism sector. Discover areas of excellence that can inspire you to learn from others and implement similar strategies aligned with your own priorities.

Technical Notes Page 54

Unpack the methodology used in the Wealth & Wellbeing Index, including key definitions, data sources, and references.

CHAPTER 02

APPROACH

Niagara Falls, Ontario

INTRODUCTION

The goal of the Wealth & Wellbeing Index is to cultivate a tourism sector that boosts Canada's economy, nurtures the environment, and uplifts the lives of everyone involved—be it residents, visitors, communities, or businesses.

In essence, the Wealth & Wellbeing Index is more than just a measurement tool; it is a catalyst for change. It challenges us to look beyond traditional benchmarks, to value the quality of interactions and experiences as much as their quantity. By doing so, it invites a deeper, more meaningful engagement with our environments, cultures, and communities. Ultimately, it guides us towards decisions that honour the intricate balance between advancing our economic goals and nurturing the wellbeing of our planet and its people.

In recent years, the tourism sector has increasingly recognized the limitations of traditional metrics focused solely on volume, such as visitor numbers and spending. This awareness has driven a shift towards a broader, whole-systems evaluation, incorporating insights from local communities, tourism experts, and cultural representatives to enrich our understanding. By considering the wider effects of tourism beyond mere numbers, this approach aims to achieve a deeper and more authentic understanding of tourism's real impact, steering the industry towards a future that is regenerative and inclusive for all.

Building on this shift towards a more nuanced and inclusive assessment, the Wealth & Wellbeing Index emerges as a pivotal development. Crafted in collaboration with industry stakeholders, the tool has evolved beyond traditional metrics by evaluating an array of indicators across six pivotal sub-indices: Economy, Employment, Enablement, Environment, Engagement, and Experience. Designed to meet the evolving needs of the tourism sector, it delivers in-depth analysis at both national and provincial levels. The Index serves as a foundation for identifying trends, performance, and uncovering actionable insights, while also empowering policymakers, business leaders, and community stakeholders to make informed decisions. This initiative fosters a culture of continuous improvement and innovation, driving the visitor economy towards sustainable growth and identifying areas for enhancement. By "visitor economy" (which is mentioned extensively throughout this document), we mean all economic activity that is generated by visitors—direct and indirect—in a community.

Available on the newly established Canadian Tourism Data Collective (Data Collective), the Index invites everyone to play a part in sculpting a promising future for Canadian tourism. By integrating perspectives from various industry partners, the Index not only captures a comprehensive view of the sector's health but also promotes a shared vision for its future. It sets forth ambitious goals: ensuring tourism businesses not only thrive but are integrally connected to and enrich their communities; promoting coveted and inclusive employment opportunities; fostering vibrant local cultures that welcome the world; achieving ecological harmony and carbon rebalancing; supporting infrastructure development; and offering transformative experiences that highlight Canada's uniqueness on the global stage. Through this initiative we hope that a more comprehensive, thoughtful approach to measuring tourism's impact can indeed pave the way for an even more successful and sustainable future.

INDIGENOUS PERSPECTIVES

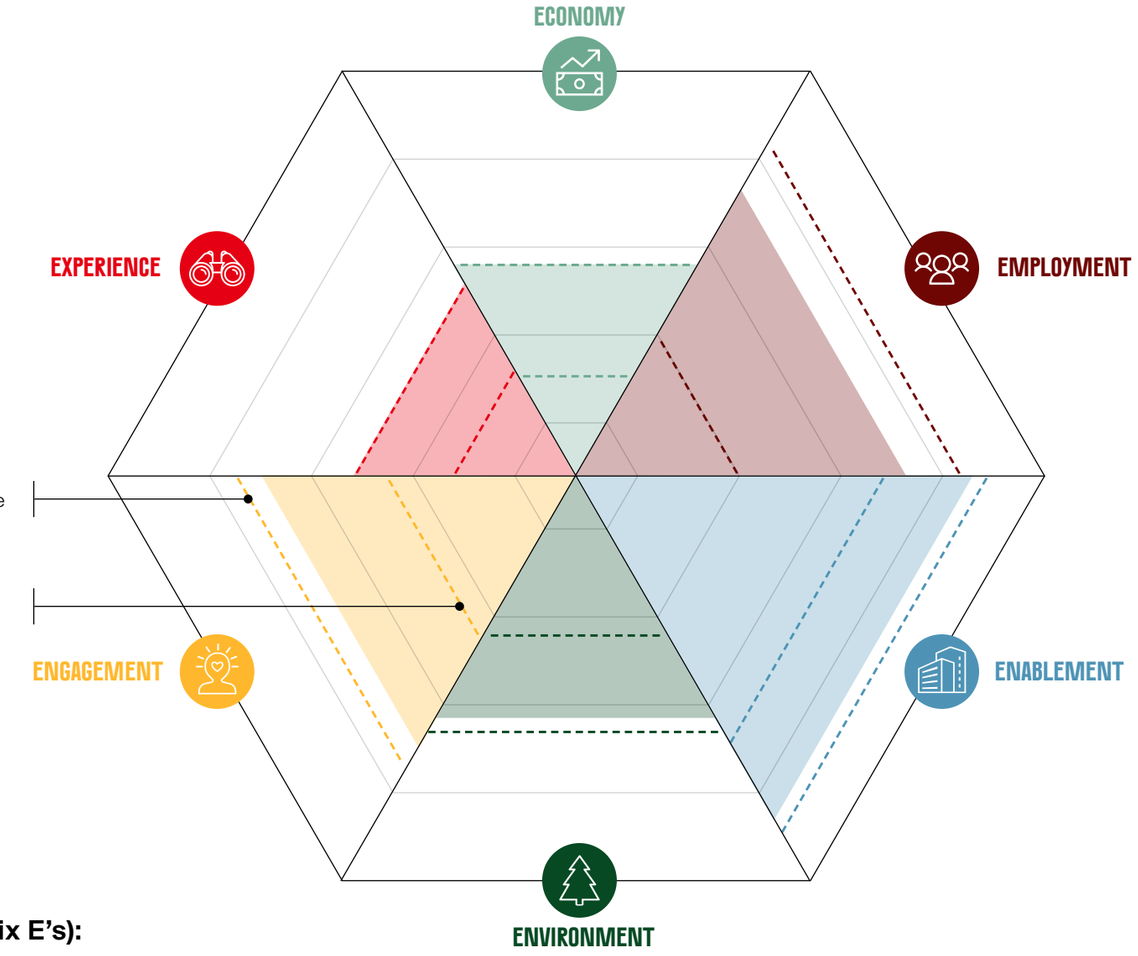
In developing the methodology, we consulted with the Indigenous Tourism Association of Canada (ITAC) and referenced the "Truth and Reconciliation Commission of Canada: Calls to Action". Guided by ITAC, we integrated Indigenous perspectives, where data is available, across all sub-indices of our analysis. However, it's important to acknowledge the significant lack of available data. This limitation highlights broader issues in data collection and availability concerning Indigenous contexts, underscoring the ongoing need for improved data inclusivity and representation in the tourism sector.

Black Rock Oceanfront Resort, Ucluelet, British Columbia

METHODOLOGY

Measuring the performance of the tourism industry in Canada.

The Wealth & Wellbeing Index methodology, developed through collaboration with industry partners, systematically gathers data across 109 indicators, which are organized into 30 distinct categories within 6 sub-indices. This structured approach ensures a comprehensive and nuanced understanding of tourism's multifaceted impact.



The Six Sub-indices (Six E's):

Economy

Tourism businesses are prosperous, deeply embedded in and generate wealth for communities.

Employment

Tourism jobs are coveted and inclusive of diverse people and geographies.

Enablement

Tourism flourishes with the development of quality infrastructure.

Environment

Tourism operates in harmony with ecological abundance and rebalancing of the carbon cycle.

Engagement

Local cultures thrive, are rooted in community and welcome the world.

Experience

Guests are transformed by rich experiences that distinguish Canada in the world.

The Wealth & Wellbeing Index Framework

The Wealth & Wellbeing Index aligns with the United Nations' Measuring Sustainability in Tourism (MST) framework, ensuring that our approach is consistent with global best practices in sustainable tourism. Additionally, it supports the Sustainable Development Goals (SDGs) by measuring tourism's economic, social, and environmental impacts, contributing to the global effort to promote inclusive and sustainable growth.

Economy

- → Tourism Performance
- → Tourism Growth
- → Tourism Yield
- → Tourism Investment
- → Tourism Investment Growth
- → Tourism Business Vitality
- → Tourism Business Diversity

Employment

- → Tourism Employment Supply
- → Tourism Employment Growth
- → Tourism Employment Diversity
- → Tourism Employment Development
- → Tourism Industry Attractiveness

Enablement

- → Business Ecosystem
- → Digital Readiness
- → International Openness
- → Quality of Life
- → Tourism Service Infrastructure
- → Tourism Transportation System

Environment

- → Environmental Impact
- → Natural Assets
- → Tourism Sustainability

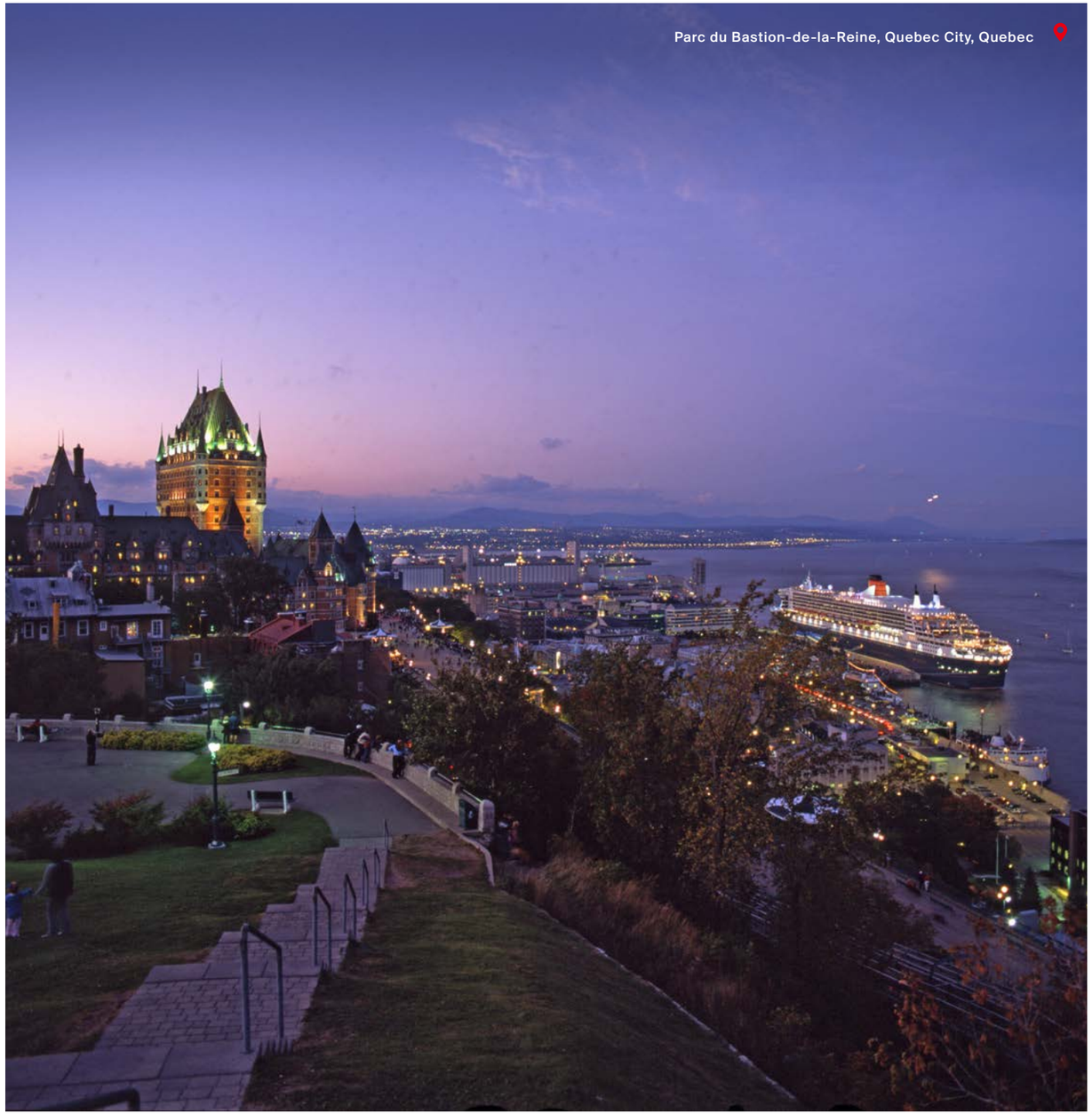
Engagement

- → Community Openness
- → Cultural Representation
- → Cultural Resources
- → Cultural Vibrancy

Experience

- → Cost of Travel
- → Place Brand
- → Tourism Products
- → Travel Demand
- → Visitor Experience

Find more detailed information on indicators and definitions in the Glossary.

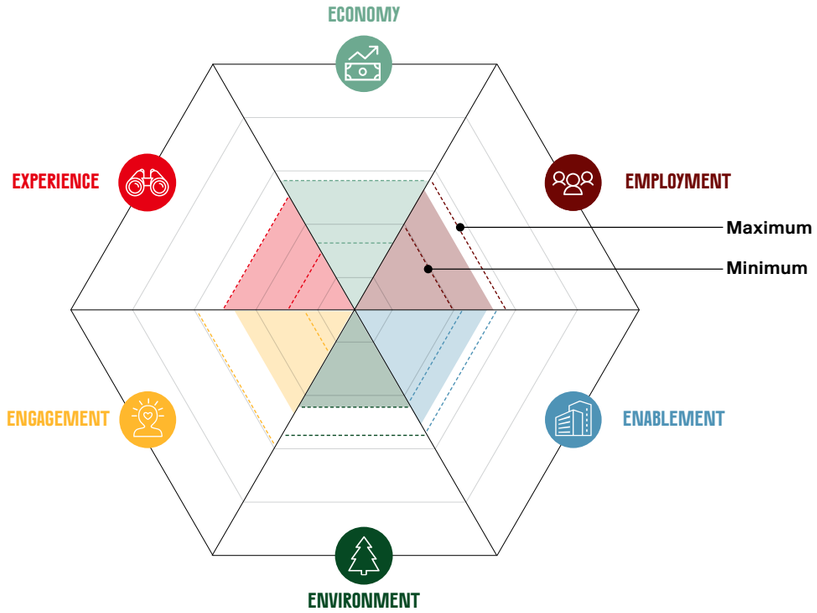

Parc du Bastion-de-la-Reine, Quebec City, Quebec

How to Read the Data

The Wealth & Wellbeing Index calculates scores by comparing each province's and territory's performance against their own historical data within each category or specific indicator. Progress is measured relative to each province's and territory's past performance, rather than a benchmark. The interactive data is available directly via the Canadian Tourism Data Collective.

The tourism sector experienced significant changes during the pandemic period, which influenced various performance indicators. The insights provided cover both the recovery period and comparisons to 2019 levels. Monitoring incremental changes in these areas is valuable for understanding the current state of tourism in the country and informing future development efforts. The reference years featured in this report reflect either the most recent data or highlight significant trends over time. This approach allows us to provide the most accurate and relevant insights for each indicator.

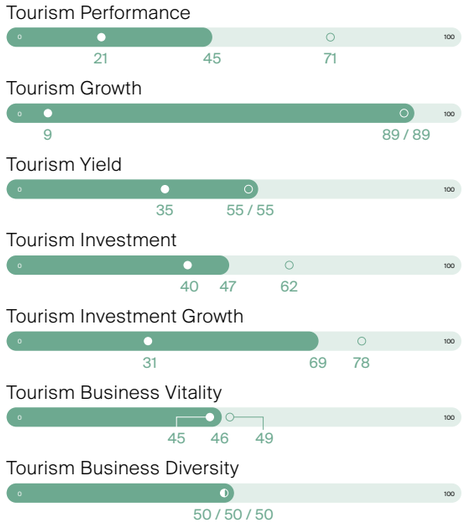
We featured each province and territory based on its unique strengths, excellence, and opportunities for development. The Highlights section of each province/territory illustrates notable improvements in these categories. Our approach aimed to highlight the diverse and robust nature of Canada's tourism sector by showcasing successful initiatives and areas of distinction in each region. This method ensures that the unique attributes and potential of every province and territory are brought to the forefront, inspiring further growth and learning across the tourism industry.



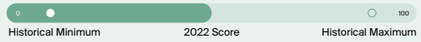
HIGHLIGHTS

- ↑ Tourism Performance
- ↑ Tourism Growth
- ↑ Tourism Yield
- ↑ Tourism Investment
- ↑ Tourism Investment Growth
- ↑ Tourism Business Diversity

CATEGORY SCORE



LEGEND



How the Wealth & Wellbeing Index is Calculated

The Wealth & Wellbeing Index is calculated by adding scores from different levels: Indicators (e.g. Tourism GDP), Categories (e.g. Tourism Performance), and Sub-indices (e.g. Economy). Each part is given equal weight. Scores are adjusted to a common scale of 0-100. This method ensures that every component contributes equally to the overall score, providing a balanced measure of wealth & wellbeing across regions.

Wealth & Wellbeing Index Methodology

INDEX = AVERAGE SUB-INDICES

▲

SUB-INDEX = AVERAGE OF CATEGORIES

▲

CATEGORIES = AVERAGE OF INDICATORS

CHAPTER 03

Ottawa Convention Centre, Ottawa, Ontario

KEY INSIGHTS

THE FUTURE OF TOURISM IN CANADA

As we look ahead to the future of tourism in Canada, the Wealth & Wellbeing Index will be a critical tool in guiding our path towards sustainable growth and inclusive prosperity. This comprehensive measurement framework enables us to track our progress while identifying areas for improvement and innovation on a national, provincial, and community level.

Our commitment is to use these insights to foster a tourism sector that enhances the quality of life for all Canadians, supports vibrant local cultures, and operates in harmony with our environment. By collaborating with industry partners, Indigenous communities, and stakeholders, we can ensure that tourism remains a driving force for economic and social wellbeing in Canada.

We invite you to think differently about tourism and its potential. The Wealth & Wellbeing Index goes beyond traditional metrics and encourages a more holistic approach to evaluating tourism's impact. By considering economic, socio-cultural, and environmental dimensions, we can create a more successful and sustainable tourism industry for all Canadians.

Cape Smokey Gondola, Cape Breton Island, Nova Scotia

Key Insights

Economy

INSIGHT 01

Record Growth in Tourism GDP

Canada's tourism GDP grew by 9.5% in 2023, marking a significant recovery and demonstrating the sector's resilience and economic contribution. Meanwhile, total sector revenue reached $113 billion in 2023, greatly surpassing the pre-pandemic 2019 benchmark of $105 billion. Ontario is leading the nation in total visitor expenditure.

INSIGHT 02

Tourism Champions Business Diversity in Canada

Tourism is one of the most diverse sectors, with women owning 20% of tourism businesses and immigrants owning 36%. Across communities in Canada, the tourism sector plays a vital role in fostering inclusivity, promoting social integration, and enhancing economic resilience.

INSIGHT 03

Robust Public and Private Investment in the Tourism Sector

Canadian provinces and territories are driving increased private and public investments in tourism, enhancing visitor experiences and community benefits. Although more investments are required throughout the country by both the private and public sectors, the Yukon has notably increased public funding, supporting sustainable tourism through various funding programs. At the same time, Saskatchewan has seen a remarkable surge in private tourism investment, reaching its highest level in recent years.

Employment

INSIGHT 04

An Inclusive Business Environment Drives Job Creation

Tourism employment grew by 4.5% in 2023, compared to 3.7% in 2019, reflecting continued growth in job opportunities, yet total employment still lags behind pre-pandemic levels. The tourism sector continues to provide diverse and inclusive job opportunities, with notable growth in skilled labor and workforce development. This highlights the industry's resilience and its critical role in creating jobs and opportunities for people to stay and work where they grew up – in urban, rural or remote places across Canada. This post-pandemic resurgence has been particularly evident in some areas, with the Atlantic provinces experiencing a strong uptick in tourism-related employment.

INSIGHT 05

Canada's Tourism Sector is Becoming More Attractive

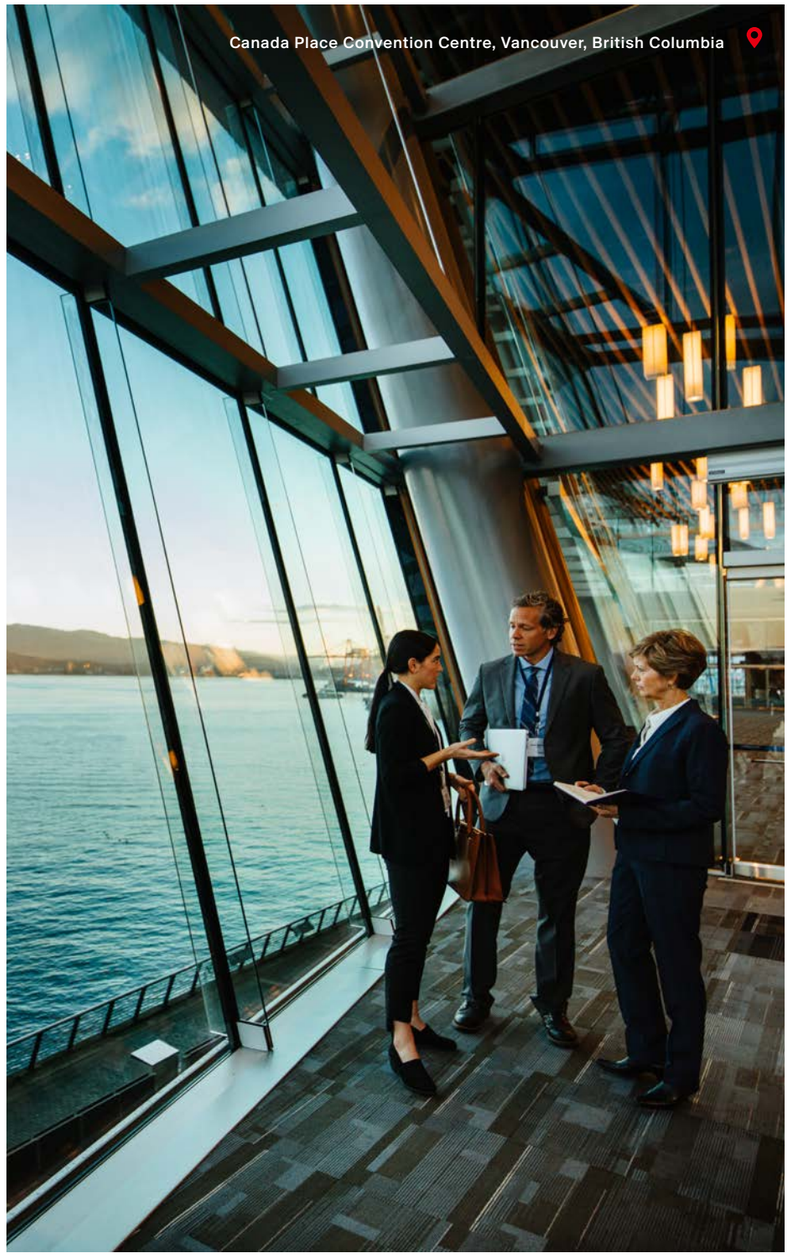
Canada's tourism sector is evolving, with narrowing wage gaps and a growing share of high-wage roles, strengthening its appeal as a career path. Over a third of all tourism employment is in high-wage careers. This shift reflects ongoing efforts to enhance the sector's competitiveness and address long-standing challenges in attracting and retaining talent.

INSIGHT 06

Sustained Skilled Labour Growth Makes the Tourism Sector More Resilient

The tourism sector has seen growth in its share of skilled workers, making it more adaptable and resilient. Across Canada, more tourism workers are now recognized as skilled labour. Alberta highlights this trend, with a noticeable increase in skilled workers over recent years.

Banff National Park, Alberta


Canada Place Convention Centre, Vancouver, British Columbia

Enablement

INSIGHT 07

Digital Adoption is Growing

The tourism industry's digital readiness grew from 2019 to 2022, with online orders and purchases increasing from 42% to 48%. This digital shift enhances visitor experiences and expands market access for local businesses while boosting labour productivity. It also improves access to information about destinations and boosts connectivity in remote and rural areas, benefiting both visitors and local communities. The integration of AI in daily operations will accelerate the evolution to digital.

INSIGHT 08

Multi-modal Connectivity for Canadians and Travelers

Investments in transportation are enhancing both connectivity and quality of life for residents and travelers alike. Tourism is a key enabler of the critical transportation networks required for living in a vast country and connects Canada from coast to coast to coast, supporting the supply of goods and services to Canadians while improving visitor experiences and supporting tourism growth. British Columbia, Ontario, and Quebec stand out among the provinces with the highest levels of international, inter-regional, and intra-regional air connections while also leading in local and regional rail connectivity.

Environment

INSIGHT 9

Natural Assets Support Tourism in Canada

Canada added nine conservation areas since 2016, creating new destinations for visitors
Canada added nine conservation areas since 2016, creating new destinations for visitors and residents. National Parks, Provincial Parks, UNESCO Biospheres, and Dark Sky Reserves highlight the essential role these areas play in protecting natural environments and biodiversity while balancing recreational use and visitation. British Columbia, the Northwest Territories, and the Yukon have led the way over the past six years.

INSIGHT 10

Sustainability Efforts Lead the Way

In 2022, Canada invested $15.7 billion in green energy and infrastructure, boosting renewable energy sources from 64% to 68% since 2016. This investment indirectly supports the sustainability of tourism by improving the environmental footprint of the sector's operations. Notably, Newfoundland and Labrador, Prince Edward Island, Quebec, Manitoba, British Columbia, and the Yukon all generate more than 95% of their energy from renewable sources, contributing to greener tourism experiences in these regions.

INSIGHT 11

A Collective Commitment to Reduce the Sector's Environmental Impact

All provinces that recorded GHG emissions from the tourism industry showed decreases since 2016, demonstrating a collective effort to address climate challenges in the sector. Understanding climate risks is crucial for the tourism sector's resilience and the communities that depend on the visitor economy. While Canada ranks 94th in the Global Climate Risk Index for extreme weather vulnerability, it's making progress.

Engagement

INSIGHT 12

Growing Community Awareness of Tourism's Value

Tourism continues to make a meaningful difference in communities across Canada, with public sentiment showing steady support: Canadians consistently acknowledge that tourism positively contributes to their communities, with approval above 80% across all reporting periods. This underscores Canadians' positive outlook on tourism's community engagement and openness. Positive perceptions of tourism are particularly evident in the northern territories and New Brunswick, where the Canadian Reconciliation Barometer* highlights strong leadership in the tourism sector fostering inclusive communities and advancing Indigenous welfare.

INSIGHT 13

Increasing Government Support for Preserving and Promoting Cultural Heritage

Canada's dedication to cultural heritage and artistic expression is reflected in its growing financial support for arts and culture, rising from $931 million in 2018 to $977 million in 2022. Ontario takes the lead in arts and culture funding and assets, while Quebec and British Columbia have the highest concentrations of Indigenous tourism businesses, showcasing their strong ties to cultural diversity and heritage.

INSIGHT 14

Cultural Tourism Investments Deliver Economic Benefits

Canada's roster of significant cultural sites continues to grow, with the addition of its fourth UNESCO Creative City—London, Ontario, recognized as a Creative City of Music—and its tenth UNESCO Cultural World Heritage Site, Tr'ondëk-Klondike in the Yukon. Newfoundland and Labrador, Nova Scotia, Ontario, and Quebec each host two UNESCO World Cultural Heritage Sites, alongside sites in the Yukon and British Columbia. These cultural resources preserve destinations' uniqueness and authenticity while enhancing tourism experiences through engagement with local culture, art, and history.

Experience

INSIGHT 15

Canada's Brand is Strong

Since 2019, Canada's status as a destination of choice has been consistently upheld through positive impressions, strong consideration, and high awareness. Media coverage of Canada as a travel destination has also seen notable growth, contributing to an enhanced global profile and deeper engagement with the country's diverse tourism offerings.

INSIGHT 16

Rising Global Interest Highlights Canada's Appeal

Interest among past visitors in returning to Canada has significantly increased, alongside a notable rise in spending above 2019 levels from target audiences. Visitor satisfaction has also maintained an upward trend, showing that experiences across the country consistently meet or exceed expectations, reinforcing Canada's appeal as a top travel destination.

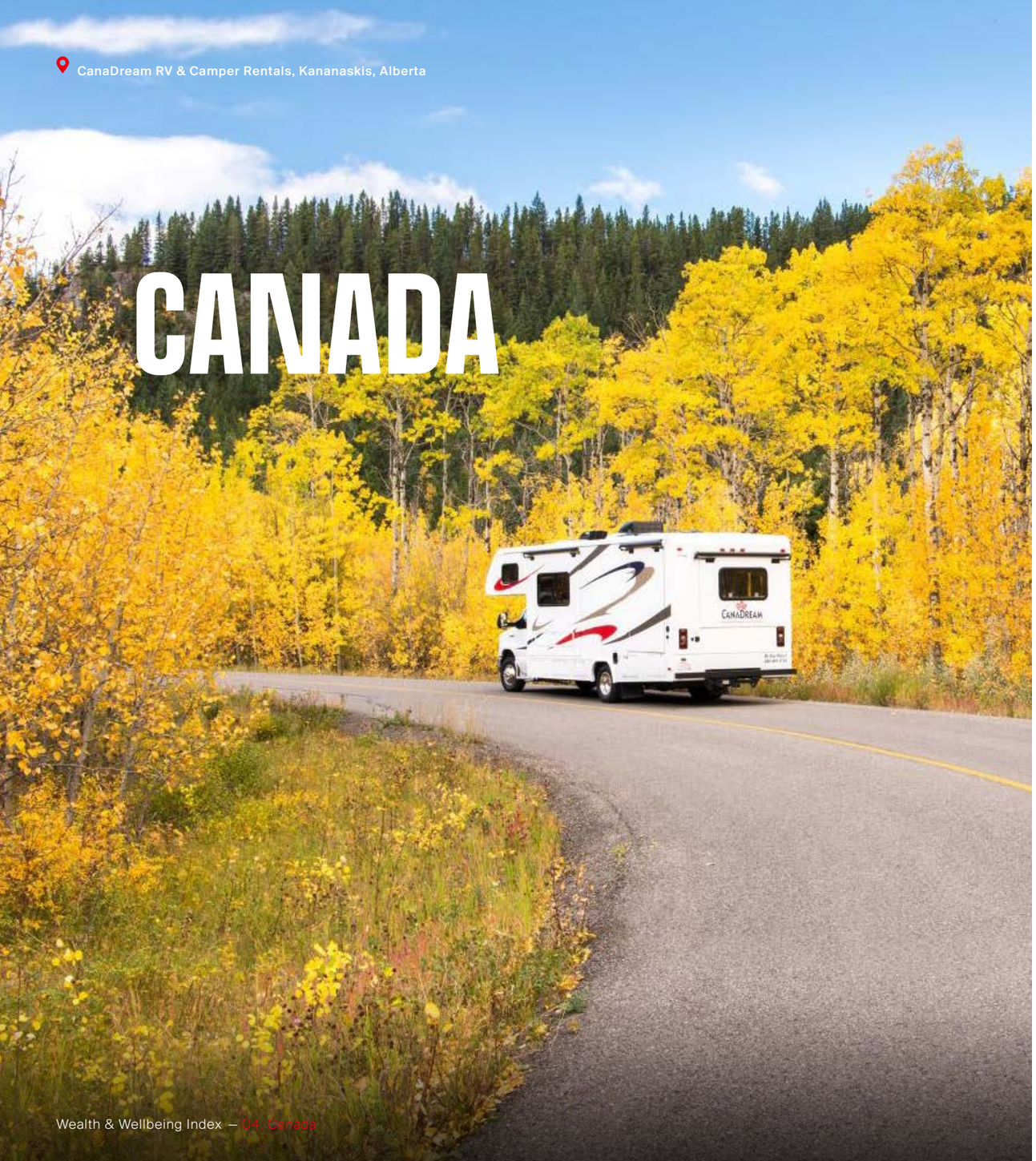
*The Canadian Reconciliation Barometer is a tool for understanding, tracking, and promoting reconciliation in Canada.

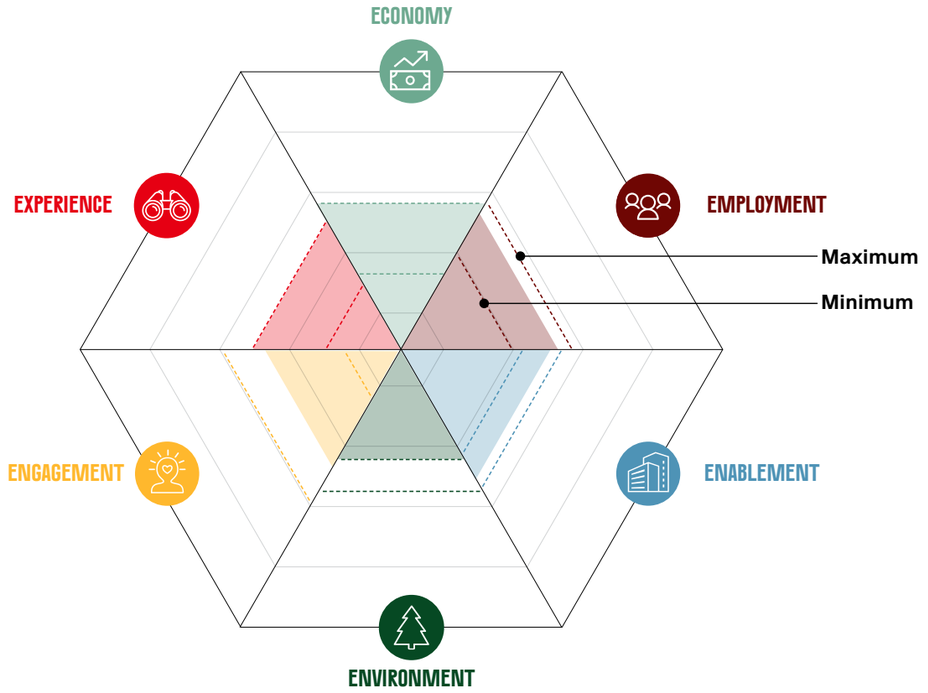
Remai Modern, Saskatoon, Saskatchewan

CHAPTER 04

Wendake, Quebec

CANADA





The tourism sector plays a transformative role in Canada, driving economic, social, and cultural vitality while preserving the country's natural and cultural heritage. Contributing $300 million daily and accounting for 2.1% of GDP in 2019, tourism was one of the fastest-growing sectors in 2023 with a 9.5% GDP increase. It connects communities from coast to coast to coast and supports nearly 1 in 10 jobs, with a diverse workforce. Additionally, tourism plays a vital role in safeguarding and showcasing Canada's vast natural landscapes for the enjoyment of both visitors and residents. Looking forward, aligned with Destination Canada's *Tourism 2030: World of Opportunity* strategy, the sector aims to reach $160 billion in annual revenues by 2030, with a projected compound annual growth rate of 6.1%, outpacing the broader Canadian economy. These goals reflect Canada's commitment to sustainable growth and its readiness to welcome the world in the coming years.

Economy

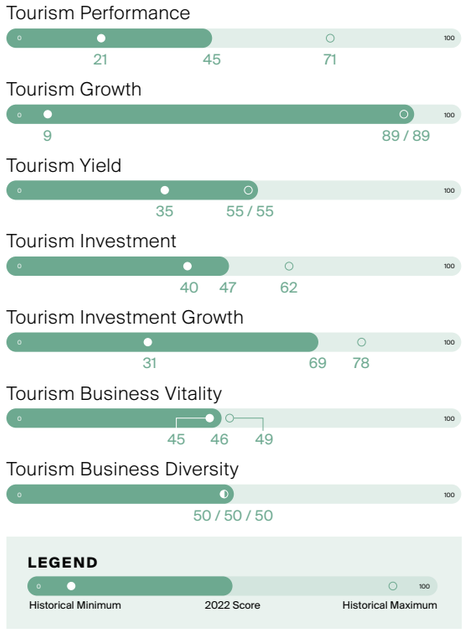
OUTCOME

Tourism businesses are prosperous, deeply embedded in and generate wealth for communities.

HIGHLIGHTS

- ↑ Tourism Performance
- ↑ Tourism Growth
- ↑ Tourism Yield
- ↑ Tourism Investment
- ↑ Tourism Investment Growth
- ↑ Tourism Business Diversity

CATEGORY SCORE



Economic metrics gauge the growth, innovation, and resilience of the tourism industry, alongside the prosperity it brings to communities. It reveals opportunities to drive local economic growth through increased, visitor-economy-powered business activity and private investment, enhancing infrastructure and services that benefit both visitors and residents. The extent of support and investment in this sector fuels the ability of local businesses to expand and thrive.

Tourism Yield

Tourism's contribution to the Canadian economy is massive, setting a new record in 2023 with $113.4 billion in visitor spending. Tourism yield goes beyond counting visitor numbers and dives into how much revenue each visitor brings in. It's about understanding the quality of their experience and how deeply they connect with our destinations. Higher spending per visitor provides information on how visitors are experiencing a destination, how long they are staying, where they are going—and how far a tourism dollar can go within a community. By better understanding visitation and spending patterns, it helps us plan more effectively and identify opportunities to grow year-round activities and ensure that tourism growth benefits local communities economically. While average visitor spending has mostly increased with inflation to $1,091 in 2022, the distribution of tourism across different seasons approached to 2019 levels, reaching 62% of spending outside of peak season. The change in spending patterns indicates that visitors are enjoying Canada year-round and engaging more deeply with the destination, reflecting successful tourism experiences and a growing interest in the locale. According to *The Laws of Attraction for High-end Travel* report developed by Destination Canada in partnership with FT Longitude that surveyed executives across 10 different countries working in travel agents, tour operators and meetings, incentives, conferences and exhibitions (MICE) operators, whose clients spend at least US$1,000 per day on travel, post-pandemic visitors are opting to luxuriate in place upon arrival, spending lavishly on local meals and shopping. Destinations are extending the traditional "high season" beyond core holiday peaks, influenced by trends such as the increased flexibility of remote work. In Canada, tourism seasonality—measured by comparing spending during the three peak months to spending across the rest of the year—remains a key focus, with peak season spending reaching 62% in 2022.

Tourism Investment

Tourism investment is a key driver of economic growth, job creation, and community development in Canada. By attracting both private and public investment, we can enhance our tourism infrastructure and create memorable experiences for visitors, while improving quality of life in communities. Tourism will significantly outpace Canada's economy, with 6.1% compound annual growth between 2024 to 2030, and support economic development of communities in Canada. Private investment in tourism is recovering with a year-over-year increase of 4.6% in 2021 and 9.3% in 2022. According to the fDi Tourism Investment 2022 Report, Ontario was the fourth-largest attractor of tourism FDI in North America by project numbers between 2017 and 2021, thanks to a record-breaking year for tourism investment in 2019, when the province attracted six projects worth approximately $338 million in capital investment that were projected to create 650 jobs. Public tourism investment funding has grown nationally as part of the post-pandemic recovery efforts, led by the $108 million in federal funding as part of the federal 2023 budget and the Tourism Growth Program that will be delivered by Canada's regional development agencies over three years, starting in 2023-24. The program will support Indigenous and non-Indigenous communities, small and medium-sized businesses and not-for-profit organizations in developing local, community-level tourism products and experiences to help more domestic and international visitors discover all that Canada has to offer. While Canada has seen positive growth in tourism investment, it's important to view this progress within a global context. According to the UN Tourism fDi Investment Report, Canada's comparative position is decreasing relative to other countries. This highlights the need for continued efforts to enhance Canada's competitiveness in the international tourism investment landscape, even as we celebrate our year-on-year growth and domestic successes.

Tourism Diversity

Diversity in tourism businesses is vital for fostering innovation, economic resilience, and social inclusion. Canada's tourism sector is a shining example of inclusivity, with significant representation of women, immigrants, and other marginalized groups. Growing business diversity not only enhances the visitor experience but also ensures that the benefits of tourism are shared broadly across society. Tourism is one of Canada's most diverse economic sectors, boasting a 20.3% share of female tourism business owners and 35.5% share of immigrant tourism business owners. As noted in the Federal Tourism Growth Strategy, Canada's tourism sector is uniquely inclusive in its workforce, racialized and 2SLGBTQI+ communities, youth, women, new Canadians, and Indigenous persons often find their first job in the visitor economy. In 2022, women and youth represented higher percentages of the tourism labour force than the overall workforce; as well, more majority owners of tourism businesses identified as women, racialized Canadians, or newcomers to Canada than in other sectors. With that level of bench strength, a new generation of diverse Canadians is waiting their turn to innovate and share in the national visitor economy.

TOURISM OUTLOOK

The Tourism Outlook presents the current state and future of tourism in Canada, including specific market insights.

Employment

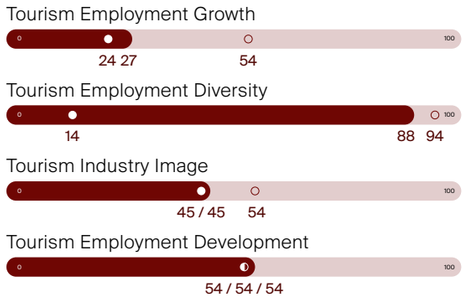
OUTCOME

Tourism generates highly sought-after jobs that are inclusive of diverse demographics and locations.

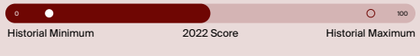
HIGHLIGHTS

- ↑ Tourism Employment Growth
- ↑ Tourism Employment Development

CATEGORY SCORE



LEGEND



Tourism generates jobs that are inclusive of diverse demographics and locations. The sector's image, bolstered by career opportunities and professional standards, is vital in drawing talent. Positive perceptions of tourism careers attract skilled workers, which is essential for delivering exceptional services and experiences—experiences that encourage repeat visitors and worldwide advocacy, thereby driving economic growth and investment.

Tourism Employment Growth

Today, 1 in 10 Canadian jobs are related to the tourism sector. This is why it's vital to track annual growth in tourism employment and its location. These metrics surface the visitor economy's overall growth for local workforces and the development of supportive policies to sustain a robust talent pool. In Canada, the significant 8.5% increase in tourism employment in 2022, compared to the 3.7% increase in 2019, reflects the ongoing recovery and resilience of the industry. This growth not only signifies economic rebound but also represents a vital expansion in job opportunities for local communities as the sector continues to regain strength post-pandemic. Within the framework of a regenerative approach to tourism, this increase can empower local populations by providing them with direct involvement and significant roles in the development of the tourism sector in their regions. As of mid-2022, more than 2 million jobs in Canada were tourism-dependent, spanning various sectors that benefit from tourism activities. Tourism employment in 2023 continues to grow, reaching 96% of its pre-pandemic (2019) levels, according to Tourism HR Canada. It is expected to surpass pre-pandemic levels in 2024. This growth needs to be tracked, analyzed and supported in order to achieve service levels and customer expectations commensurate with a high quality, high value destination.

Tourism Employment Diversity

With the tourism sector being comprised of 48% women and 28% newcomers, it is one of the most diverse sectors in Canada. It stands out for providing entry-level and long term career opportunities that drive the wealth and wellbeing of communities. As noted in the Federal Tourism Growth Strategy, Canada's tourism sector is uniquely inclusive in its workforce. Racialized and 2SLGBTQI+ communities, youth, women, new Canadians, and Indigenous persons often find their first job in the visitor economy. In 2022, women and youth represented higher percentages of the tourism labour force than the overall workforce; as well, more majority owners of tourism businesses identified as women, racialized Canadians, or newcomers to Canada than in other sectors.

Tourism Industry Attractiveness

Understanding the perception of tourism as a career and the difference between average wage for tourism jobs and all jobs are key for both the public sector and its SME operators to better understand the marketplace for skilled talent. Tourism employment supply is critical to growth of the tourism sector, especially coming out of the COVID-19 pandemic. In 2022, 37% of Canadians viewed working in the tourism industry as an excellent career opportunity, while the difference between average wage for tourism jobs and all jobs decreased. Research projects like the 2023 Canadian Tourism Sector Compensation Study are table stakes for building industry resilience.

TOURISM EMPLOYMENT TRACKER

The Tourism Employment Tracker, provided by Tourism HR Canada, monitors employment and unemployment trends in the tourism sector, including business activity and productivity.

Enablement

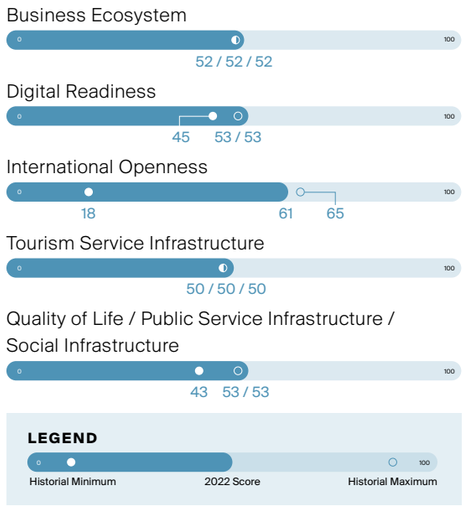
OUTCOME

Tourism flourishes with the development of quality infrastructure, empowering not only the visitor experience but the quality of life for residents.

HIGHLIGHTS

- ↑ Digital Readiness
- ↑ International Openness
- ↑ Quality of Life

CATEGORY SCORE



The Enablement category reflects a destination's capacity to host visitors based on its built environment—the quality of the infrastructure and the access to public services physically and digitally. National and regional connectivity relies on major infrastructure investments to improve accessibility for both visitors and residents, while housing affordability and quality of life ensure a mutually beneficial experience locally.

Digital Readiness

The use of digital platforms for providing access to accommodations, activities, and experiences, by many measures, set Canada's visitor economy apart. This digital landscape necessitates measuring the digital readiness of tourism businesses and their ability to host guests, improve accessibility, and enhance the convenience of services for visitors. From 2019 to 2022, the share of online orders and purchases for goods and services in the tourism industry rose from 42% to 48%, reflecting the growing impact of digital tools in enhancing visitor experiences and expanding market access for local businesses. This increase in digital readiness not only improves accessibility to information on destinations but also bolsters connectivity for communities in remote and rural areas, benefiting both guests and locals alike. According to the 2023 Cisco Canada Digital Readiness Index, which defines 'digital readiness' as how well-positioned a country, province or territory is to benefit from the digital economy based on its digital capability and infrastructure, Canada's digital readiness performance year-over-year remains strong and consistent. The country is continuing to invest in critical areas that will help maintain its competitiveness. Federal projects like "Connect to Innovate" fund projects that bring improved internet speeds to rural and remote communities in Canada. The program has committed $585 million to improve connectivity in more than 975 rural and remote communities, including 190 Indigenous communities, as of 2023. This program primarily supports new "backbone" infrastructure to connect institutions like schools and hospitals, as well as funding upgrades to the "last-mile" infrastructure to households and businesses. Robust digital infrastructure across Canada's vast landscape is crucial for tourism, enabling seamless experiences for visitors and empowering local businesses to showcase and deliver their services effectively.

Quality of Life

A country's crime rate, housing affordability, average greenness, number of hospital beds per capita, wastewater treatment capacity, and long-term drinking water advisories inherently affects its ability to host visitors and grow its visitor economy. Its performance is also circular: properly managed visitor investment within a community has an impact on the daily life of residents and provides the ability to improve amenities and services available to the community. Canada has successfully resolved 137 long-term drinking water advisories in Indigenous communities as of 2022, with the number now reaching 144 in 2024, signalling a crucial step towards building trust and fostering stronger relationships with these communities. This progress is pivotal for developing a tourism sector that not only benefits but is also shaped by Indigenous communities, ensuring their active participation and influence in managing regional tourism initiatives.

Affordable housing is critical to community development and the tourism experience, ensuring quality of life for residents and sustaining tourism employees in place. In 2022, tourism workers spent on average 39% of their income on rent. Municipalities across Canada are working with partners to provide more affordable housing options for workers in tourism destinations. In the Yukon, the Tourism Association Partners (TAP) is tackling one urgent priority in the province, which is to provide staff housing for tourism industry businesses. In Whistler, "Home Run" is a matching program for property owners to rent their properties to businesses with the goal of increasing affordable housing supply for Whistler's workforce.

Tourism Transportation Infrastructure

Transportation infrastructure drives geographic and seasonal dispersion across Canada. Air connectivity connects key leisure and business markets to our destination, while multi-modal transportation (both intra- and inter-provincial) is critical to ensure seamless experiences for visitors and accessible and reliable mobility and connectivity options for Canadians. Especially in a country our size. Fortunately, transportation investment in Canada is poised for significant growth this decade. The Transportation 2030 strategic plan outlines key initiatives to enhance the country's transportation system, including Canada's investment of $2.3 billion to strengthen trade infrastructure, including ports, waterways, airports, bridges, border crossings, and rail networks.

The High-Frequency Rail project is a significant transportation infrastructure initiative in Canada. It aims to create a modernized passenger rail service using primarily dedicated and electrified tracks. The project would connect Quebec City, Trois-Rivières, Montreal, Ottawa, Peterborough, and Toronto, potentially improving transportation options in one of Canada's busiest travel corridors.

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. Find it in the Data Collective.

Environment

OUTCOME

Tourism operates in harmony with ecological abundance and rebalancing of the carbon cycle.

HIGHLIGHTS

↑ Tourism Sustainability

CATEGORY SCORE

Envionmental Impact

Envionmental Resources

Envionmental Sustainability

LEGEND

The Environment category examines the impact of tourism on ecosystem regeneration and resource conservation, through indicators like the number of environmental treaty ratifications and the proportion of energy derived from renewable sources, which guide sustainable practices that protect community health and natural assets. This multi-faceted approach underscores tourism's reliance on, and contribution to, environmental stewardship and sustainable development. That, in effect, helps protect recognized natural assets that drive visitation.

Natural Assets

Recognized natural assets like the number of national parks, provincial parks, UNESCO Biospheres, like drive visitation to the open spaces of Canada and support the conservation and protection of nature and wildlife. From 2016 to 2022, the number of parks and conservation areas in Canada increased from 1,271 to 1,280, underscoring their vital role in protecting natural environments and biodiversity. While the job ahead will only get more challenging on a warming planet, Canada remains dedicated to stewarding our natural bounty. As the largest federal land manager, Parks Canada is a recognized leader in conservation and is confronting the global challenges of climate change and biodiversity loss through protection of national parks, national marine conservation areas and actions directed towards the recovery of species at risk. By protecting and restoring healthy, resilient ecosystems and working with partners to recognize and maintain vital ecosystem corridors, the resulting networks of protected areas play important roles in helping mitigate, buffer, and adapt to the impacts of climate change. Parks Canada is a significant contributor to Canada's commitment to protect 25% of its lands and oceans by 2025 and 30% by 2030. Annually, Parks Canada summarizes the condition (good, fair, poor) and the trend (improving, stable, declining) of ecosystems' ecological integrity in national parks using a series of monitoring measures to track changes in biodiversity and natural processes. Based on its latest study of 117 ecosystems in 42 national parks in 2022, the ecological integrity of 79% of park ecosystems was stable or improving in 2022. Still, this represents an 11% decrease from 2016.

Tourism Sustainability

In 2022, Canada invested $15.7 billion in green energy and infrastructure, increasing the share of renewable energy sources from 64% in 2016 to 68%. This strategic shift towards renewable energy reduces the carbon footprint of tourism-related activities and supports regions in tracking emissions, informing market decisions, and minimizing the environmental impact of tourism. This aligns the industry with the preferences of eco-conscious travellers seeking proven, documented sustainable destinations. Canada's visitor economy is part of a federal commitment to responding to the global challenge of climate change, with the Government of Canada working to achieve net-zero greenhouse gas emissions within its operations by 2050. Parks Canada is dedicated to responding and adapting to climate change throughout its operations. Recognizing that the Agency has one of the largest and most complex asset portfolios within the federal government, Parks Canada is pursuing a mix of short-, medium-, and long-term actions to achieve these goals.

Environmental Impact

Understanding climate risks created by the visitor economy is critical to driving the resilience of the tourism sector and the communities that depend on it. Environmental indicators, such as GHG emissions per visitor and the Climate Risk Index, guide sustainable practices that protect community health and natural assets.

Three of the greatest causes of GHG emissions are transportation, food production and food waste, and built infrastructure - all areas where tourism has a major impact. The sector can make great strides in reducing its environmental footprint through improved practices such as local food sourcing and minimized disposal, faster adoption of Sustainable Aviation Fuel, and implementation of LEED sustainable building specifications.

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.

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.

Engagement

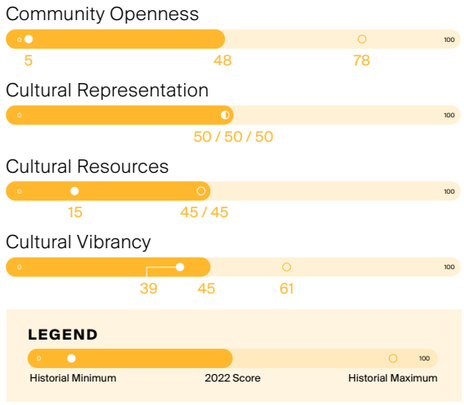
OUTCOME

Thriving local cultures, rooted in community, attract global curiosity and tourism, driving economic benefits.

HIGHLIGHTS

- ↑ Community Openness
- ↑ Cultural Resources

CATEGORY SCORE



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.

Our Engagement category celebrates Canada's diverse cultures, heritage, and Indigenous vibrancy through a variety of experiences, events, and programs, highlighting rich cultural resources. The expansion of tourism is closely tied to communities' openness to sharing their culture with visitors, underscoring the importance of local attitudes towards tourism and the effective management of its economic contributions. This reciprocal relationship is vital for promoting sustainable economic and socio-cultural contributions and ensuring long-term prosperity.

Community Openness

Canadians are increasingly recognizing the contribution that a locally owned visitor economy has to their quality of life, and the vital role Indigenous engagement and collaboration plays in a resilient, sustainable, and mutually respectful partnership. Between 2021 and 2022, the percentage of Canadians recognizing the impact of tourism on their quality of life rose from 52% to 59%, a shift that signifies deeper community engagement and empowerment. This increased awareness enhances residents' participation in tourism planning and decision-making processes, ensuring that tourism development aligns with the community's needs and aspirations. Residents may also recognize that tourism drives investment into community assets, supporting further improvements that lead to more sustainable and mutually beneficial outcomes for their communities. The percentage of Canadians recognizing the impact of tourism on economic strength also increased.

Cultural Resources

The number of oral and intangible cultural expressions, the number of UNESCO Creative Cities, and the number of UNESCO Cultural World Heritage Sites yield more economic benefit to communities. Investment in cultural tourism increases pride in cultural assets and heritage supporting its preservation and growth. According to a 2023 Ontario Arts Council report, the average arts and culture-themed visitor has approximately triple the economic impact as a visitor whose trip does not include an arts and culture component. As such, in order to attract more of these highly engaged guests, it is vital that Canada continue investing and stewarding its numerous cultural assets, recognized by its nine UNESCO Cultural World Heritage Sites that stretch from Gwaii Haanas National Park Reserve and Haida Heritage Site in British Columbia, to Lunenburg on the South Shore of Nova Scotia. In fact, cultural tourism is a fast-growing and lucrative segment of the North American travel industry, according to the Creative City Network, and since Montreal in 2006, four Canadian cities have secured creative status, Montreal, Quebec City, Toronto, and London, a designation that recognizes their strategic commitment to placing creativity and cultural industries at the heart of their development plans. For destinations of all sizes, cultural resources help maintain the unique character and authenticity of a destination, while enriching the tourism experience through a deep engagement with local culture, art, and history.

Cultural Representation

Language diversity (the percentage of people speaking a second language at home), perception of the representation of Indigenous cultures, and knowledge of French and English, are all metrics that result in an open, equitable, and empowered destination for visitors. Canada's rich tapestry of cultures is deepest among Indigenous nations. These provide vital insights into the cultures, traditions, and histories of its Indigenous peoples, crucial for preserving these elements through generational knowledge transfer and visitor engagement. However, it's important to note that while the Indigenous tourism sector continues to recover, it has not yet surpassed its 2019 performance levels, reflecting ongoing challenges and opportunities for growth in this important industry segment. These experiences not only facilitate significant economic benefits by directly involving Indigenous communities in tourism but also ensure that Indigenous peoples lead their own representation, sharing their perspectives. With the potential for Indigenous tourism to contribute to reconciliation by creating jobs in communities nationwide, supporting its growth, in close partnership with First Nations, Inuit, and Métis communities, it is resulting in Government of Canada commitments like the Indigenous Tourism Fund. Working with the Indigenous Tourism Association of Canada (ITAC), the $10-million Micro and Small Business Stream offers direct financial support to Indigenous tourism businesses. It's just one way that the Indigenous tourism industry is planning to surpass its $1.9-billion contribution to Canada's GDP in 2019, and recovering the 39,000 jobs in the industry as part of that contribution. ITAC's new 2024-25 Action Plan also provides further insight into the ambitious plan for Canada to become the global leader in Indigenous tourism by 2030.

Cultural Vibrancy

Between 2016 and 2022, financial support for arts and cultural tourism in Canada grew from $931 million to $977 million, reflecting efforts to preserve and promote cultural heritage and artistic expression. This investment aids in maintaining and restoring historical sites and also supports cultural festivals, funds, museums, and galleries that showcase local traditions and history. Consequently, such funding diversifies tourism offerings and deepens visitors' understanding of the area's cultural context, turning typical visits into transformative experiences. Increasing collaboration between Canada's cultural leaders, notably united in 2022 at the National Culture Summit, provides opportunities to bring together leaders and practitioners from across these sectors for urgent conversations that can inform the Government's next steps in supporting the arts, culture, and heritage sectors, and sharing that story with all Canadians.

Experience

OUTCOME

Guests are transformed by rich experiences that distinguish Canada in the world, while in our diverse destinations, while researching their trip, and upon returning home and sharing their adventures.

HIGHLIGHTS

- ↑ Travel Demand
- ↑ Place Brand
- ↑ Visitor Experience

CATEGORY SCORE

Experiences are fundamental to defining a destination's brand and its overall value, which are determined by both the quality and competitiveness of the visitor experience. Online content plays a crucial role in shaping visitors' perceptions, sparking interest, and encouraging visits from target travellers. The value of actual travel experiences drives positive word-of-mouth—Canada's most valuable marketing tool. To maintain Canada's attractiveness, the industry must continuously improve every touchpoint of the guest experience, adapting to changing expectations often set by non-tourism sectors.

Travel Demand

Canada represents so many adventures in one country, dispersed across bioregions and cultures. Promoting and measuring global visitor demand for these experiences and destinations through visitor networks and media is crucial. It not only deepens interest but also increases the length and diversity of stays. The geographic dispersion of visitors in 2022 returned to levels seen in 2019, indicating a recovery in tourism spread across Canada. This dispersion can be understood through the distribution of tourism spending. Specifically, the top tourism regions in Canada accounted for approximately 28% of all tourism spending. This suggests that while these popular areas attract a significant portion of tourist dollars, about 72% of tourism spending occurs in other regions, demonstrating a relatively balanced distribution of tourism activity across the country. The 50% growth in demand search in the past three years reflects a growing global interest in Canada as a travel destination. This heightened interest is an important first step in destination consideration, and the conversion of more of our target audience to visit. The jump in earned media coverage of Indigenous experiences plays a crucial role in promoting understanding and appreciation of Indigenous cultures, traditions, and perspectives, and reflects the global trend of seeking wellness, local experiences, and cultural immersion in travel. This increased subsequent visibility supports the preservation and celebration of Indigenous heritage, a core element of a regenerative approach to tourism, which emphasizes the importance of cultural sustainability and the empowerment of local communities.

Place Brand

Canada's strong reputation as a vacation destination, consistently upheld through positive impressions and recommendations, enhances its global appeal and attracts a diverse array of new and repeat visitors. The pursuit of the authentic also aligns with Destination Canada's "Canada's Unique Blend of Openness" positioning, personified by open spaces, open hearts and open minds. But the glow around brand Canada is not only confined to its tourism attributes. Based on a 2021 Ipsos poll of citizens of 28 countries, Canada is believed to have the most positive influence on the world in the next decade. Of course that bodes positively for the country's visitor economy—and Canada's economy at large—and envelopes a visit in positive expectations. As such, visitor satisfaction in Canada has remained notably high, continuing an upward trend from 2019 to 2022, which indicates that visitor experiences are consistently meeting or exceeding expectations. This high level of satisfaction increases the likelihood of repeat visits—guests who are likely to appreciate and respect the destination's values.

Visitor Experience

This indicator measures both the spending of target audiences and their rate of return to Canada. By providing exceptional experiences, Canada can distinguish itself from other destinations and create influential advocates. These satisfied visitors, who often share Canada's values, are likely to explore more places and businesses during their stays. More importantly, they tend to share their positive experiences with others, effectively promoting Canada as a desirable destination. A high rate of return visitors can also help attract investment in infrastructure and services. Equally vital: the interest of past visitors to visit Canada again has nearly doubled since 2020.

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.

GLOBAL TRAVEL RESEARCH PROGRAM (GTRP)

The Global Travel Research Program 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.

GLOBAL SEGMENTATION PROGRAM

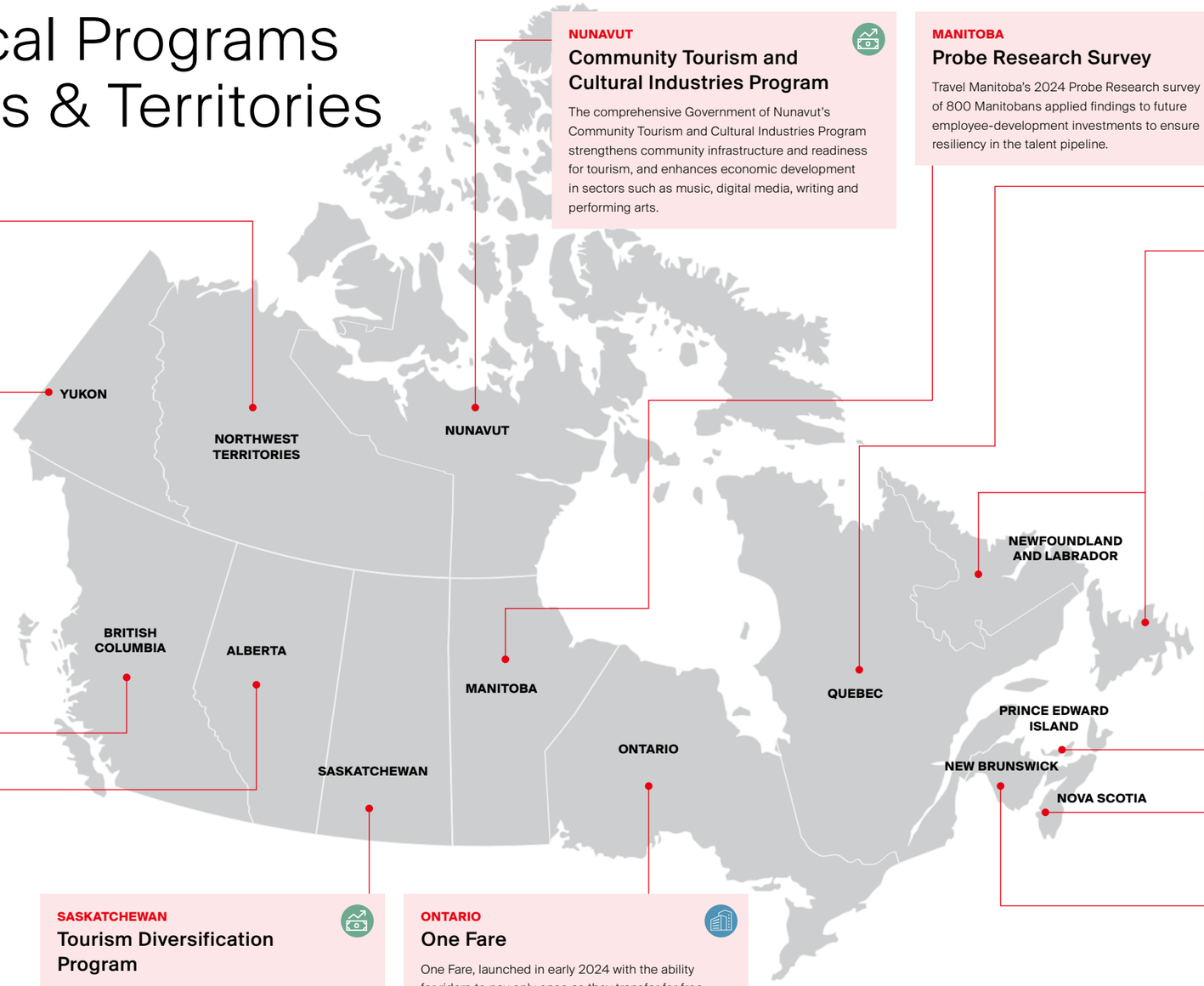
Destination Canada is rolling out a new visitor segmentation program that will provide a deeper understanding of today's travellers to, and within, Canada.

CHAPTER 05

Lake Louise, Alberta

PROVINCES TERRITORIES

Examples of Local Programs Across Provinces & Territories



NORTHWEST TERRITORIES

Community Tourism Infrastructure Contribution Program

The Community Tourism Infrastructure Contribution Program enhances NWT community tourism assets to encourage people to visit and stay longer in communities by encouraging partnerships between non-government organizations and private industry in the tourism sector, increase the use of communications technology in tourism products; and enhance the local tourism economy.

YUKON

Rugged Apprentices

The new Rugged Apprentices initiative, which pairs visitors with development programs they can work on as part of their visit, was set up to improve infrastructure in Yukon communities so travellers and locals alike can keep enjoying the territory's amazing activities and wilderness.

BRITISH COLUMBIA

BC Tourism Climate Resiliency Initiative

Destination British Columbia's two-year pilot program called the BC Tourism Climate Resiliency Initiative (BCTCRI), launched in 2024.

ALBERTA

Tourism and Hospitality Stream

The Alberta Advantage Immigration Program's new Tourism and Hospitality Stream supports foreign workers already working full-time in the tourism and hospitality sector and have a full-time job offer from a qualifying Alberta employer in an eligible occupation.

SASKATCHEWAN

Tourism Diversification Program

Tourism Saskatchewan's Tourism Diversification Program provides funding for market-ready businesses to diversify their revenue by developing new experiences, expanding seasonal operations and attracting new markets.

ONTARIO

One Fare

One Fare, launched in early 2024 with the ability for riders to pay only once as they transfer for free between the TTC and participating transit agencies in the Greater Toronto Area, including GO Transit, are expanding multi-modal travel throughout the province.

NUNAVUT

Community Tourism and Cultural Industries Program

The comprehensive Government of Nunavut's Community Tourism and Cultural Industries Program strengthens community infrastructure and readiness for tourism, and enhances economic development in sectors such as music, digital media, writing and performing arts.

MANITOBA

Probe Research Survey

Travel Manitoba's 2024 Probe Research survey of 800 Manitobans applied findings to future employee-development investments to ensure resiliency in the talent pipeline.

QUEBEC

Capital Assistance Program

The Ministry of Culture and Communications' Capital Assistance Program focuses on ensuring the sustainability and quality of cultural infrastructure like performing venues, as well as improving and promoting accessibility to arts and culture for Quebec residents.

NEWFOUNDLAND AND LABRADOR

Tourism Re-skilling for Non-Tourism Sector Worker

The Tourism Re-skilling for Non-Tourism Sector Workers initiative is a provincially mandated program with the goal to provide a coordinated, central point of access to engage all labour market stakeholders about challenges, opportunities, and best practices in workforce development.

PRINCE EDWARD ISLAND

Climate Adaptation Plan

Provincial projects outlined in the province's 2022's "Building Resilience: Climate Adaptation Plan," range from bicycle rebates and e-Bike incentives, to clean tech support that helps PEI reach its 2040 target of being the first province in Canada to reach net zero GHG emissions.

NOVA SCOTIA

UNESCO World Heritage Sites

Nova Scotia boasts two UNESCO Cultural Heritage Sites (along with four other designated sites), for a total of six UNESCO world heritage sites and the program is increasingly driving tourism to the province.

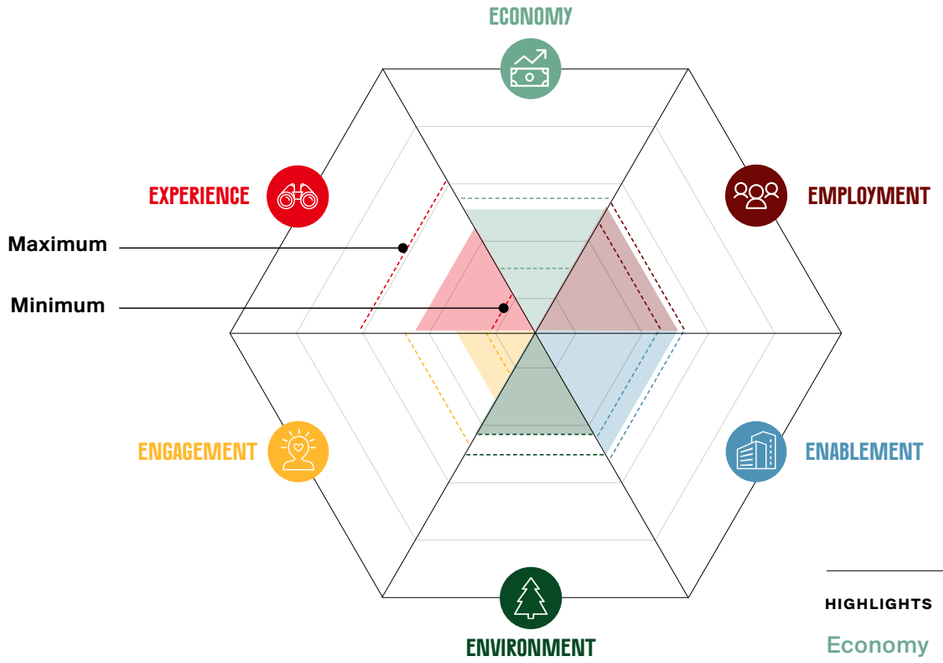
NEW BRUNSWICK

Indigenous Inclusivity Toolkit

The Indigenous Inclusivity Toolkit by JEDI (Joint Economic Development Initiative) is an easy-to-use guide to help build Indigenous inclusivity in the New Brunswick workforce.

BRITISH COLUMBIA

The visitor economy is a major economic engine in British Columbia, with a rapid tourism recovery post-pandemic and expansion of its tourism infrastructure in anticipation of record visitors for the decade ahead. A new level of commitment to sustainability and Indigenous tourism self-governance reflects the province's wider commitments.



HIGHLIGHTS

Economy
↑ Tourism Yield

Environment
↑ Tourism Sustainability
↑ Natural Assets

Engagement
↑ Indigenous Engagement

Economy

↑ Tourism Yield

As the Canadian province that relies the most on tourism by GDP, British Columbia was particularly hard hit by the pandemic and its lockdown on international and regional travel. Fortunately, provincial and local leaders acted quickly to develop an expedited recovery plan with extensive consultation with business owners, sector associations, and marketing organizations. Stronger BC: BC's Economic Recovery Plan and BC's Restart Plan include a cross-government approach to help all aspects of the tourism industry recover, create jobs, and grow the economy. The Province has committed more than $228 million in support of the tourism sector throughout the COVID-19 pandemic. As of 2022, British Columbia's Revenue Per Available Room, an indicator that's part of the Economy category, increased to $143 above 2019 levels, which is the highest in the country.

Environment

↑ Tourism Sustainability

Another high-performing key indicator in British Columbia was in the Environment category's Tourism Sustainability area, namely the Share of Renewable Energy indicator. The share of renewable energy in British Columbia is at an all-time high at 93% of the province's energy, up from 91% in 2016. This is the highest rate in Western Canada. According to BC Hydro, the crown corporation serving 95% of the province, more than 98% of the power it generates is from clean, renewable sources, the vast majority via hydroelectric facilities, along with a small portion from wind, solar, and biomass. Just 2% of BC Hydro's power comes from natural gas, used only as backup generation during periods of high demand, like in the winter months. Additionally, in early 2024, Destination British Columbia launched a two-year pilot program called the BC Tourism Climate Resiliency Initiative (BCTCRI) to enable tourism operators to develop actionable sustainability plans and provide them with grants and other resources aimed at reducing energy consumption and costs, and resiliency around climate change-related threats.

Whistler, British Columbia

Environment

↑ Natural Assets

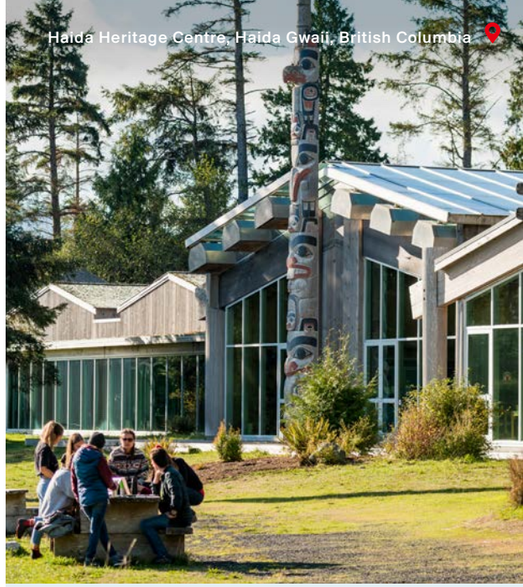
British Columbia also stands out for its Natural Assets. Over the past six years, British Columbia has increased its number of parks and conservation areas more than any other province, going from 579 in 2016 to 589 in 2022.

The increased protection of the province's natural areas is the result of growing international commitments by the province. B.C. is part of several ecological international commitments and agreements, including the Convention on Biological Diversity, the Ramsar Convention on Wetlands, and the World Heritage Convention. Domestically, a growing number of legislation, such as the Parks Act, the Ecological Reserve Act, and the Protected Areas of British Columbia Act, ensures the legal creation, management, and protection of provincial parks and ecological reserves. Good thing, too, given that in 2022, a record number of people made reservations for campsites, day-use passes, backcountry permits, cabins, and picnic shelters in B.C.'s provincial parks.

Engagement

↑ Indigenous Engagement

British Columbia leads the country in Indigenous tourism. As of 2022, the province offers 101 Indigenous visitor experiences, the highest number in Canada. This achievement results from intentional and ongoing collaboration with the many Indigenous nations whose lands residents and visitors live, work, and play on. For over a decade, First Nations have been involved in the management of some federal and provincial parks. For example, the Pacific Rim National Park Reserve is cooperatively managed by Parks Canada and eight of nine Nuu-chah-nulth Nations through cooperative management boards. The Nations have been advising on the future and direction of the area since 1995. As part of their COVID-19 resiliency programs, the Province has provided $5 million in relief funding through Indigenous Tourism BC for 140 Indigenous tourism businesses. In November 2021, the government reinvested an additional $3 million to Indigenous Tourism BC to administer another round of recovery grants for Indigenous tourism businesses. This is one of the fastestgrowing sectors of the Province's tourism industry, creating and maintaining nearly 1,200 jobs.



Haida Heritage Centre, Haida Gwaii, British Columbia

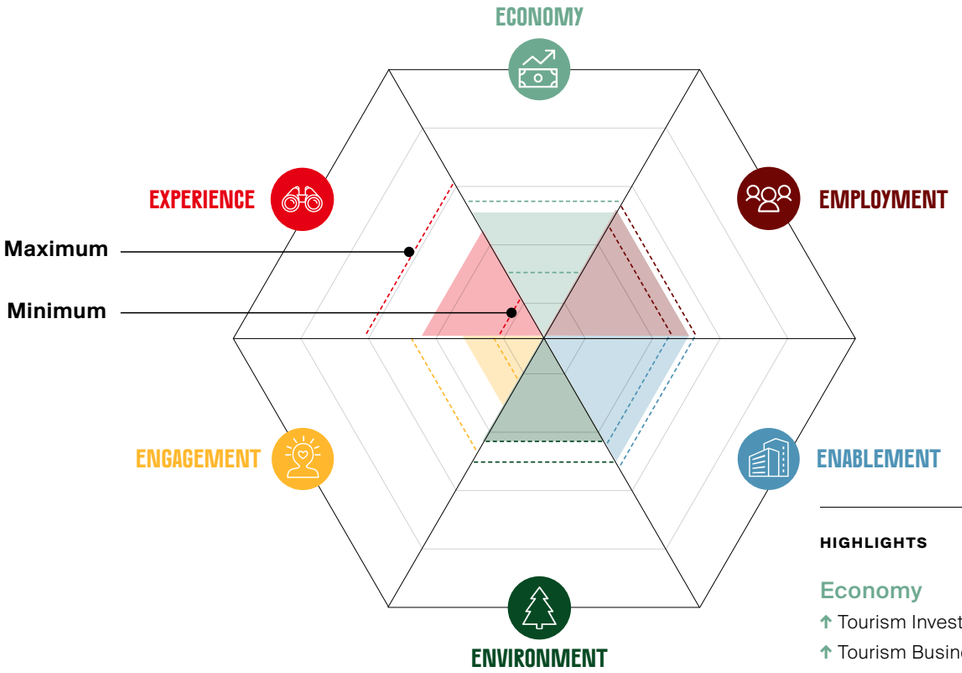
Haida Gwaii and the future of B.C. tourism

In 2024 the Haida Nation is taking significant steps toward self-governance and recognition of their inherent rights. Recently, the Haida Nation and the Province of British Columbia signed the Gaayhllxid/Gíihlagalgang "Rising Tide" Haida Title Lands Agreement, recognizing that the Haida Nation has Aboriginal title to all of Haida Gwaii. Recently. In 2021. Canada introduced Bill S-16, an Act respecting the recognition of the Haida Nation and the Council of the Haida Nation. This legislation formally recognizes the Haida Nation as the holder of the inherent rights of governance and self-determination. Through these efforts, the Haida Nation aims to create a path toward a better future, respecting and affirming the rights of the Haida people, stewards of Haida Gwaii's lands and waters since time immemorial. With direction from Haida citizens, the Council of the Haida Nation has created a voluntary Stewardship Fund to support Air, Ocean, Land, and People stewardship as it relates to tourism.

Sulphur Mountain, Banff National Park, Alberta

ALBERTA

As Alberta's visitor economy transitions from recovery to long-term economic growth, the province is taking a hands-on approach to destination management: developing destinations and experiences, improving air connectivity and access to these destinations, and promoting them to travellers around the world. The results are clear: Alberta is thriving. By investing in infrastructure and talent, developing rural destinations, attracting investors, and supporting a vibrant Indigenous tourism sector, Alberta is charting a path to more than double tourism spend in the province to $25 billion by 2035.



HIGHLIGHTS

Economy
- ↑ Tourism Investment Growth
- ↑ Tourism Business Growth

Enablement
- ↑ Tourism Transportation System

Engagement
- ↑ Cultural Vibrancy

Experience
- ↑ Tourism Products

Economy

↑ Tourism Investment Growth

The province is committed to nurturing Alberta's tourism economy, with a balanced funding model made up of both public and private investment. Travel Alberta directly invests in tourism operators, communities and associations to develop new and enhanced tourism products that will yield a high return on investment. In 2023, every dollar that Travel Alberta invested in growth projects resulted in an investment of $3.1 from the private sector—contributing $30 million in total economic impact.

The province is also committed to investment attraction – Travel Alberta's investor concierge program provides bespoke services to potential investors who may be looking to bring their next big project to life in Alberta, matching them with local tourism operators across the province. The success is in the numbers: in 2019, private investment in the tourism sector has been on an upward trend in Alberta.

Economy

↑ Tourism Business Growth

The annual growth in tourism consumer spending in Alberta increased in 2021 by 26% , an impressive 333% in 2022 , followed by another 19% in 2023 at $12.7 Billion. 2023 marked a full return of international markets with international visitor spending growing by 91%. The recovery in international markets in 2023 was largely driven by the US and the UK, surpassing 2019 expenditures by over 60% in each of those markets; Mexico, Germany and France are very close to recovery as well. The provincial long-term tourism strategy, published in early 2024, forecasts robust growth for the sector over the next 12 years, reaching $25 billion in 2035.

Experience

↑ Tourism Product

Alberta is working to diversify its destinations by developing year-round experiences and accommodations in new destinations in rural parts of the province. These "tourism development zones" represent parts of the province with the greatest potential for economic development. In partnership with communities and entrepreneurs, the province is fast-tracking investment attraction efforts in these regions while working to support tourism-friendly policies that support sustainable growth.

From 2021-24, Travel Alberta invested $65 million into tourism businesses and communities. 75% was in rural destinations and more than $7 million went to Indigenous tourism operators.

Enablement

↑ Tourism Transportation System

Alberta's tourism sector continues to experience steady growth, driven by strategic initiatives to enhance accessibility and infrastructure across the province. According to the 2024 report titled "Higher Ground: A Tourism Sector Strategy," the Government of Alberta is prioritizing safe, affordable, and convenient access to and throughout Alberta, in all seasons. The focus is on supporting commercial aviation connectivity to build flight capacity and frequency from target international markets through strategic air access investments (including to smaller community airports) and addressing federal aviation policies impacting access and affordability. Additionally, enhancing safe access to destinations across the province is also underway, with the fast-tracking of high-priority tourism infrastructure and destination needs into provincial road networks and capital planning processes.

Engagement

↑ Cultural Vibrancy

Many travellers are seeking authentic Indigenous-led tourism experiences, and there are many operators across the province that offer unique visitor experiences. In 2023, National Geographic highlighted Indigenous experiences in Alberta on its "Best of the World" list – the only Canadian inclusion.

Since 2021, Alberta's government has invested $12 million in Indigenous tourism to bolster the growth of Indigenous owned tourism businesses and organizations in the province, which is projected to contribute $126 million in GDP to the provincial economy in 2024. In 2023, Indigenous Tourism Alberta and Travel Alberta signed a renewed memorandum of understanding, reinforcing their commitment to building, growing, and promoting authentic Indigenous tourism experiences in partnership with Indigenous entrepreneurs and communities.

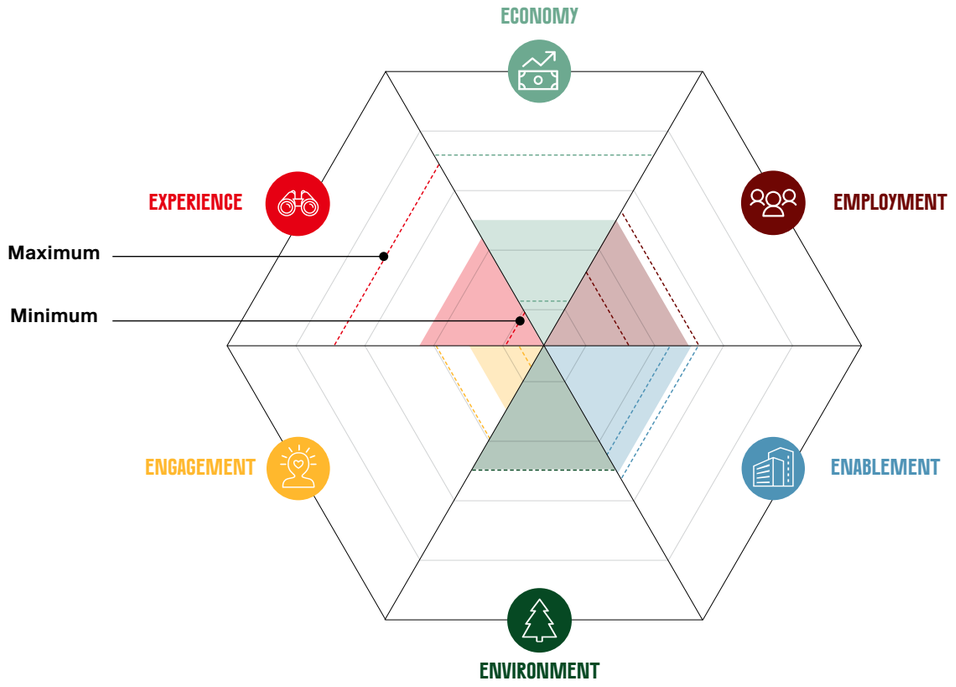
Banff National Park, Alberta

Banff's New Front Door

Banff and Lake Louise Tourism and stakeholders collectively developed a long-term vision for tourism in Banff National Park, Lead Tourism for Good, with a focus on environmental sustainability, community wellbeing, cultural integrity, and economic prosperity. As part of this vision, the destination is prioritizing transportation improvements to enhance accessibility, reduce congestion, and improve traffic flow across the region. Shuttles and public transportation, like Roam Transit, make it easier for visitors and residents to travel between Canmore, Banff, Lake Louise, and other popular tourism destinations, reducing traffic congestion and parking challenges. The proposed Banff Railway Lands Area Redevelopment Plan (ARP) will transform the historic Banff Train Station, a long-standing gateway to Banff, into a multi-modal arrival centre and transportation hub. This revitalization will convert underutilized spaces into vibrant areas for cultural and educational events while preserving Banff's heritage. Additionally, potential projects like a gondola and expanded rail services are being considered, pending further approvals. This initiative promises to celebrate Banff's historical and cultural significance, enhancing the visitor experience and benefiting the local community.

SASKATCHEWAN

Private investment in the visitor economy has never been stronger. The province's tourism businesses have surpassed 2019 totals, with business survival rates also at a five-year high. This growth is supported by a robust business vitality and increased tourism yield, demonstrating Saskatchewan's resilience and commitment to expanding its tourism sector.



HIGHLIGHTS

Economy

- ↑ Tourism Business Vitality
- ↑ Tourism Investment Growth
- ↑ Tourism Yield

Economy

↑ Tourism Business Vitality

The number of tourism businesses has grown from 2,454 in 2019 to 2,499 in 2022, an increase of 2% over the baseline year. Given the impact that the pandemic had on tourism businesses and the visitor economy, this growth, even this marginal, is notable. Programs like Tourism Saskatchewan's "Tourism Diversification Program," which provides funding for market-ready businesses to diversify their revenue by developing new experiences, expanding seasonal operations and attracting new markets have gone a long way to ensuring Saskatchewan's business survival rate of 95% in 2022 is the highest it has been in the past 5 years. The 2023 federal investment of more than $5.8 million for 14 Saskatchewan tourism operators to create or enhance tourism experiences across Saskatchewan demonstrates the ongoing support.

Economy

↑ Tourism Investment Growth

Private investment in tourism has risen 15% in 2021 and 18% in 2022, the highest growth in private investment in the Saskatchewan tourism industry on record (since 2016). In 2024, the Ministry of Trade and Export Development budget will support Saskatchewan's economy by continuing to grow the province's presence in international markets and with potential investors. Initiatives like the "Securing the Next Decade of Growth: Saskatchewan's Investment Attraction Strategy" are vital to achieving the province's plan to grow and maintain private capital investment in Saskatchewan to $16 billion annually. Saskatchewan was ranked second among the provinces for private capital investment in 2023, with an increase of nearly 25%. With an expected additional increase of 14% in 2024, the province is poised to lead the nation in growth.

Economy

↑ Tourism Yield

Average spending per visitor has increased to an all-time high for Saskatchewan to $3,291 in 2022. Overall, the industry hit $2.4 billion in expenditures in 2022, well above the $1.8-billion projection, with Tourism Saskatchewan aiming to get to $3.3 billion in business expenditures by the end of 2030, which would be a 50% increase over 2023. Revenue per available room has also surpassed its pre-pandemic value, shifting from $66 in 2019 to $69 in 2022. This growth of tourism yield has also been matched with greater seasonal dispersion, at 70% in 2022, up from the previous two years.

Wanuskewin Heritage Centre, Saskatchewan

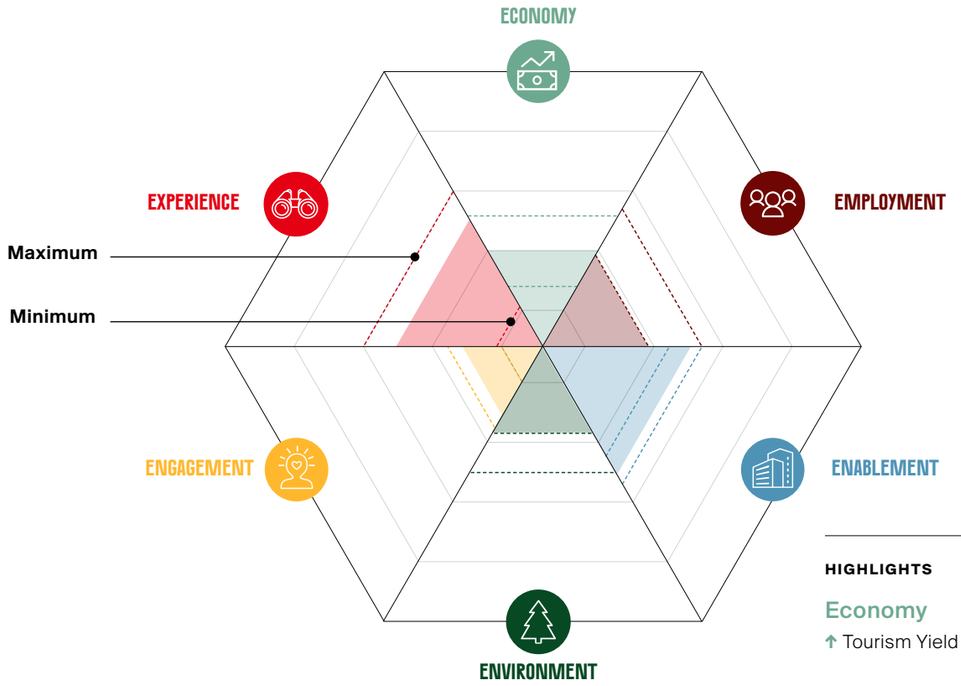
Grasslands National Park, Saskatchewan

15 Years of Stargazing

Grasslands National Park Dark Sky Preserve, tucked into the very south of the province by the U.S. border, is one Canada's darkest dark sky preserves. Since 2009, it has mesmerized visitors with star-filled nights, views of the Milky Way, and nighttime wildlife undisturbed by light pollution. The geographic isolation of the place, combined with its "hours of operation," provides Saskatchewan with a unique product to diversify its visitor economy experiences.

MANITOBA

Manitoba is developing its tourism products like never before, and visitors are spending more than ever to experience the province. The competitive cost of travel, rents, and home prices that are half the Canadian average, along with a high quality of life, help attract and retain a vital workforce, fuelling further growth and development in the tourism sector.



HIGHLIGHTS

Economy

↑ Tourism Yield

Employment

↑ Tourism Employment Supply

Enablement

↑ Quality of Life

Employment

↑ Tourism Employment Supply

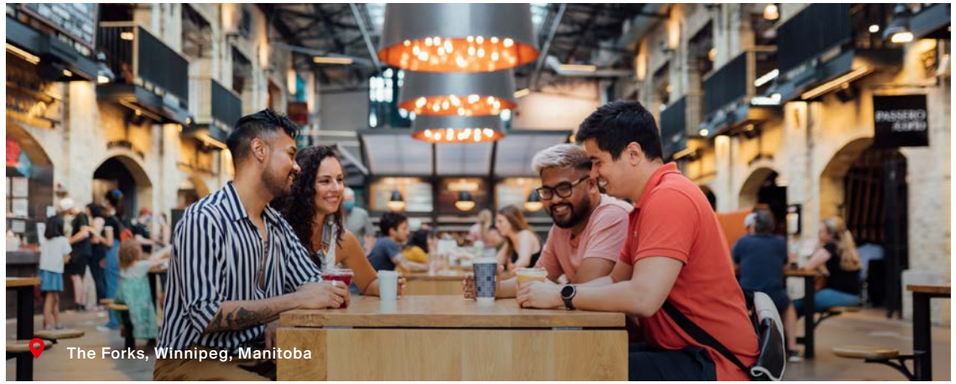
The tourism labour force retention rate in Manitoba is one of the strongest in the country, with a growth from 93% in 2016 to 100% in 2022. According to provincial numbers, tourism supports 12,900 direct tourism jobs and 20,640 jobs in total. Challenges in the perception of the tourism industry after the pandemic by potential workers are being met head-on by the province. In 2022, Travel Manitoba, in consultation with the Manitoba Tourism Education Council, Manitoba Hotel Association and the Manitoba Restaurant & Foodservices Association, led a campaign to address the significant labour shortage facing the tourism and hospitality industry. The goal of the campaign was to increase awareness of available tourism-related jobs, drive traffic to industry recruitment websites and raise the number of application. Research programs, like the 2024 Probe Research survey of 800 Manitobans, are now informing future employee-development investments to ensure resiliency in the talent pipeline.

Economy

↑ Tourism Yield

Manitoba has a robust strategy, the Manitoba Tourism Strategy, to elevate its tourism industry. Aiming to boost visitor spending by 50% by 2030, the province has introduced key sub-strategies to recover to pre-pandemic levels by 2024. These include the updated Manitoba Indigenous Tourism Strategy (2021), the Manitoba Francophone Tourism Strategy (2022), and the Northern Manitoba Tourism Strategy (2022).

The results are already impressive. In 2022, average visitor spending surged to $1,594, well above the 2019 figure of $1,234. This success is driven by innovative product diversification, which has also increased seasonal dispersion, with 68% of spending now occurring outside the peak tourism season based on spending patterns recorded by Destination Canada. Manitoba's strategic approach ensures year-round economic benefits and sustained growth.

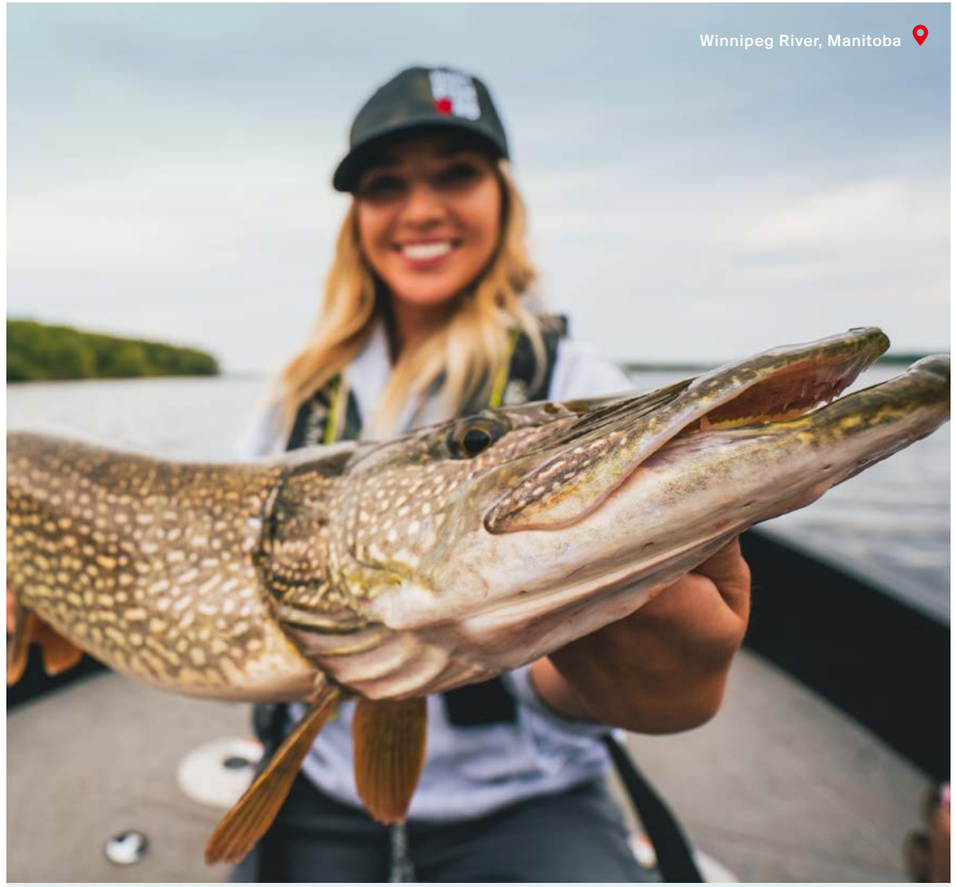


The Forks, Winnipeg, Manitoba

Enablement

↑ Quality of Life

Manitoba's rent-to-income ratio for tourism workers remains affordable compared to the Canadian average, with employees spending only 37% of their monthly income in 2022, compared to the previous year's 39%. Homeownership is also attainable compared to the rest of the country. According to the Canadian Real Estate Association (CREA), the latest data shows the average home price in April was $746,146. In Manitoba, the average price sits at around $372,000, which is half the Canadian average.

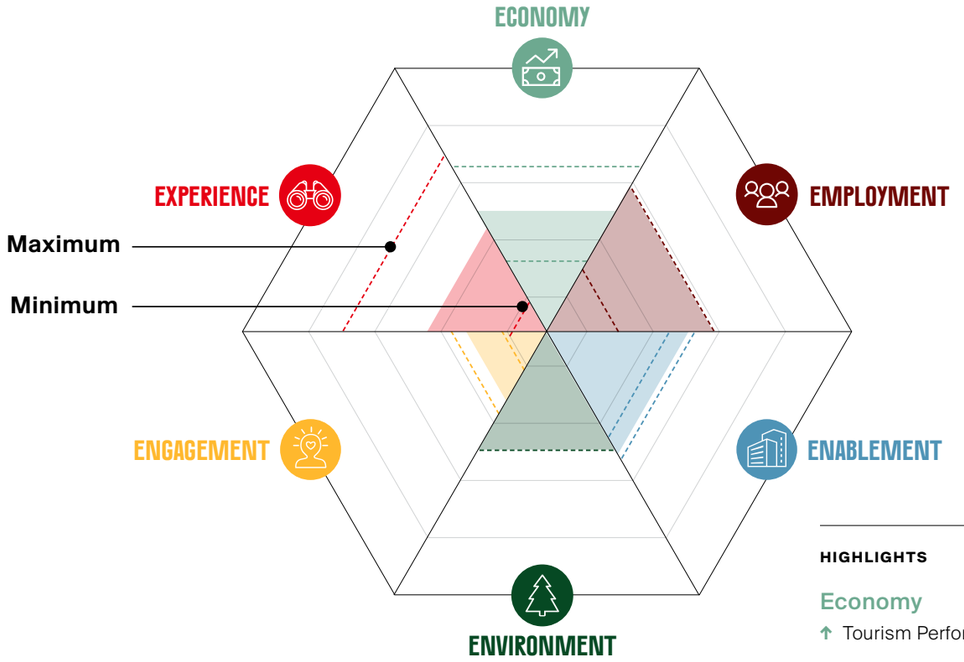


Winnipeg River, Manitoba

Outdoor Adventures in All Seasons

Manitoba is home to over 100,000+ lakes and waterways ready to be explored, including the finest fishing experiences imaginable in all seasons. From luxury lodges offering fine dining and first-class accommodations to guided trips, ice fishing, shore lunches and do-it-yourself experiences, Manitoba's fishing industry is a multi-million dollar business. Manitoba boasts world class trophy northern pike, walleye, lake trout, Arctic grayling and is also gaining prominence as a premier fly-fishing destination. Manitoba is also home to North America's first Master Angler program, now in its 60th year.

Canada's most populous province is the gateway into the country, with the robust infrastructure to welcome the world. Leading the nation in total visitors, Ontario offers a unique blend of cultural vibrancy and natural beauty. Visitors can enjoy world-class arts and cultural experiences in Toronto and, within hours, find themselves immersed in the province's rich terroir. This growing diversity of experiences is drawing visitors across the province, sharing the fruits of the visitor economy like never before.



HIGHLIGHTS

Economy
↑ Tourism Performance

Engagement
↑ Cultural Vibrancy

Enablement
↑ Tourism Service Infrastructure

Experience
↑ Travel Demand

Economy

↑ Tourism Investment Growth

Ontario's total visitor spending, as well as total visitors, is the highest in the country, with almost $4.6 billion in 2022 and $8.1 billion in 2023. Border crossings for all key markets in 2022 and 2023 surpassed 2021 levels, but were down by 23% to reach 2019 levels. The world regions with the highest increases in 2023 compared to 2022 were Africa (+104%), Asia (+94%), and Oceania (+60%), Americas (+56%), and Europe (+23%).

Engagement

↑ Cultural Vibrancy

Home to more than 160 cultural groups, Ontario has nearly 3,000 cultural experiences. Given that the average arts- and culture-themed trip has almost three times the economic impact of non-artsand culture-themed trips, according to research by the Ontario Arts Council, these experiences are an increasing priority for the province. Approximately 40% of arts and culture visitors made trips of three days or more, compared to only 13% for non-arts and culture visitors. The province is stewarding cultural tourism as a result. In 2022, financial support for cultural and arts and culture tourism initiatives reached more than $474 million—significantly growing from $383 million in 2019.

Enablement

↑ Tourism Service Infrastructure

Ontario has the largest tourism service infrastructure in the country with 135,424 total hotel rooms growing year over year. Toronto also boasts the largest convention centre in the country, hosting more than 1.5 million people annually, and is the site of more than 500 events. The province also has 92,000 tourism-related businesses that sustain 360,000 jobs, which power the visitor economy to $34.5 billion of Ontario's total GDP.

Rideau Canal National Historic Site, Ottawa, Ontario

Experience

↑ Travel Demand

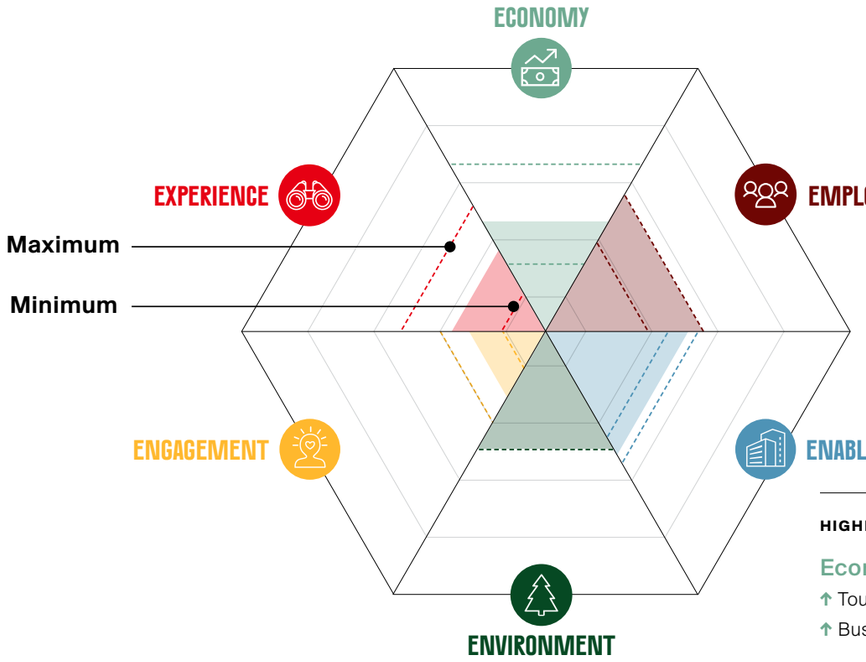
Tourism in Ontario is at an all-time high for geographic dispersion across the province at 35% of spending outside of the major tourism region. While Greater Toronto and Ottawa are home to the province's major international airports and are the starting and ending points for most trips to Ontario, provincial projects like "One Fare," launched in early 2024 with the ability for riders to pay only once as they transfer for free between the TTC and participating transit agencies in the Greater Toronto Area, including GO Transit, are expanding multi-modal travel throughout the province. Gateway regions disperse visitors to other destinations in the province, with international visitors frequently exploring communities beyond Toronto and Ottawa. In 2019, visitors to Toronto spent $2 billion in other communities and will continue to travel if given access to do so.

Canadian Canoe Museum, Ontario

The Canadian Canoe Museum is a Much-needed Showcase of Ontario Culture

The just-opened Canadian Canoe Museum, located on the Traditional Territory of the Williams Treaties First Nations in Peterborough, Ontario, is an opportunity to grow the province's cultural tourism vibrancy. With more than 600 watercraft and their stories on display (plus the ability to actually take a few for a paddle on Little Lake), the new museum not only tells a distinctly Canadian story, but inspires visitors to Toronto and Ottawa to explore smaller communities outside of the larger urban gateways they fly into.

Powered by strong international and regional air connectivity, Quebec continues to support its small- and medium-sized tourism businesses with public and private investment to ensure access to the prosperity of the growing visitor economy.



HIGHLIGHTS

Economy
- ↑ Tourism Investment
- ↑ Business Ecosystem

Engagement
- ↑ Cultural Vibrancy
- ↑ Cultural Representation

Enablement
- ↑ Tourism Transportation System

Economy

↑ Tourism Investment

There has been a significant and consistent increase in government investment in the Quebec tourism sector over the years. In 2023, $210 million was allocated over the next three years to further develop various tourist attractions across Quebec, including the renewal of the Support Program for the Development of Tourist Attractions (PADAT) which provides $60 million annually through loans and loan guarantees. Federally, the Tourism Growth Program (TGP) has provided more than $21 million in funding over three years to support Quebec's small- and medium-sized enterprises (SMEs), not-for-profit organizations (NPOs) and communities in enhancing the tourism products and experiences that make the province a destination of choice in any season.

Enablement

↑ Tourism Transportation System

Quebec has one of the strongest air connectivity ratings for international, interprovincial, and intra-provincial flights in Canada. Aéroports de Montréal will invest $4 billion by 2028 to improve public access, including additional parking, a new drop-off area, improved road access, and a link to the REM. Ongoing investment into regional airports will maintain the province's capacity to welcome regional, national, and international visitors. Additional air access is being opened up to the province with initiatives like the Regional Air Access Program (PAAR), which features subsidized and discounted leisure airfares from the province's largest cities to its smaller communities.

Economy

↑ Business Ecosystem

Quebec's business ecosystem has experienced significant growth driven by rapidly expanding large-scale enterprises in the province. The province's Top 25 companies with a headquarters in Quebec have a market cap of more than $3 billion (as of December 31, 2023), lead by CN Rail at $106B. Quebec also attracted a record $6 billion in foreign direct investment in the fiscal year ended March 31, 2023, a 30% increase from the previous year's $4.6 billion and almost triple the 2018-19 total, according to Investissement Québec, an investment and financing agency in the province. It also noted that it helped Quebec exporters book $3.1 billion of foreign sales in the most recent year, a 57% jump from 2021-22.

Engagement

↑ Cultural Representation

As Canada's largest French-speaking province, 84% of the population is French-speaking and 46% bilingual (English and French). The French language in the province is thriving. A groundbreaking 2018 study titled "Educational Issues and Identity Positioning Among Students Enrolled in an English School Board in Quebec: A case study of three regions," highlighted the ongoing complexity of English identity in Quebec as well as some of the ways in which relationships with the Francophone majority can tip the scales in favour of bilingualism and belonging. It found a desire among young people to learn French and to nurture closer relations with the majority group and the Francophonie. These young people value bilingualism as a means of fostering social cohesion in Quebec.

Quebec also boasts the second-highest number of Indigenous tourism experiences in Canada, with 82 market-ready experiences. Increasing funding and prioritization of initiatives like the Indigenous Cultural Heritage Program support the knowledge development, focus, advocacy, protection, and outreach of Indigenous cultural heritage as part of reaching provincial and federal objectives like the 2022-2027 Government Action Plan for the Social and Cultural Development of the First Nations and Inuit. The program is also in line with Quebec's cultural policy, "Partout, la culture," which among other commitments, states that Indigenous communities must have the opportunity to play a greater role in the management, advocacy and transmission of their cultural heritage, including traditional knowledge.

Engagement

↑ Cultural Vibrancy

With 2,120 cultural tourism experiences and approximately 14,300 restaurants, Quebec offers a complete and diverse mix of experiences. From global events that attract the world to distinct culinary experiences that showcase its global multiculturalism and varied terroir, the province is one of Canada's cultural powerhouses. Protection and preservation of this bounty is a priority for the provincial government, with programs like the Ministry of Culture and Communications' "Capital Assistance Program" focusing on ensuring the sustainability and quality of cultural infrastructure, like performing venues, as well as improving and promoting accessibility to arts and culture for Quebec residents. City- and region-specific programs like the 2021-2024 "Montreal Cultural Development Agreement" between Montreal and the Government of Quebec aims to support the city's cultural development and vitality while empowering sustainable future development.

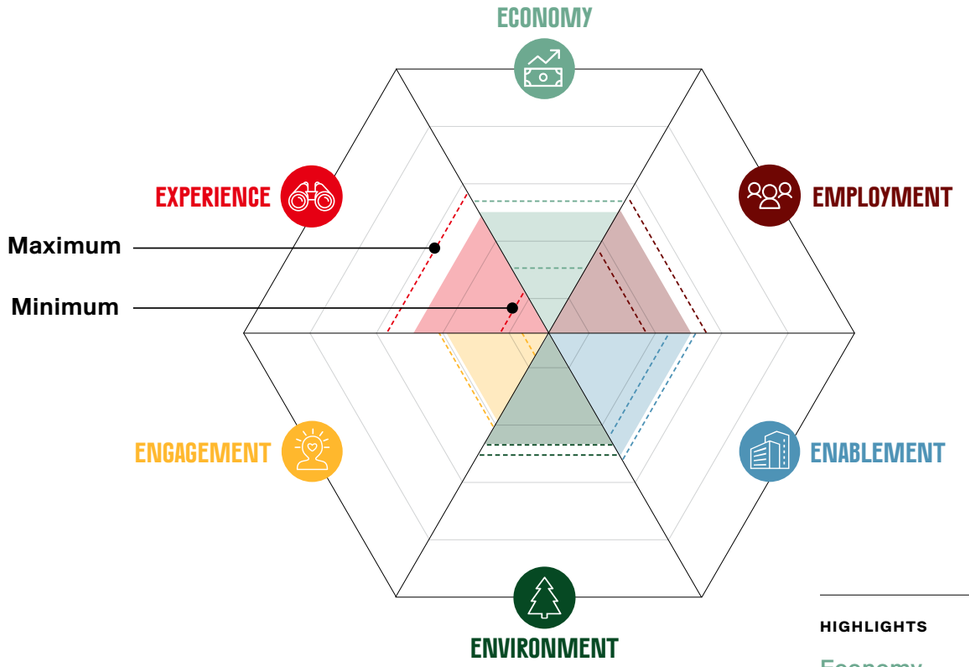
Mont Royal Park, Montreal, Quebec

Vélo Québec's La Route Verte

While the province's air connectivity continues to strengthen, so does its biking infrastructure. Over the past 25 years, the Route Verte (Green Route) has become the largest cycling route in North America. It crisscrosses the Quebec regions and connects the province with Ontario, New Brunswick, Vermont and Maine and now exceeds 5,300 kilometres across 382 municipalities, earning the title of "the most beautiful cycle route in the world" from National Geographic.

NEWFOUNDLAND AND LABRADOR

As an ancient crossroads of culture and migration, Newfoundland and Labrador is a growing Canadian destination offering great value and truly one-of-a-kind experiences. Its commitment to educating a skilled workforce to welcome the world is building tourism resilience for the long haul.



HIGHLIGHTS

Economy
- ↑ Tourism Yield
- ↑ Tourism Business Vitality

Employment
- ↑ Tourism Business Vitality

Engagement
- ↑ Cultural Resources

Economy

↑ Tourism Yield

The average spending per visitor in Newfoundland and Labrador increased more than any other province in 2021 and 2022, compared to 2019. The province's hospitality is also recovering rapidly, similar to other provinces. The accommodations sector in particular posted another strong year in 2023, with the occupancy rate (+7%), room nights sold (+15%), and total room revenue (+22%) all up compared to 2022. Room night sales continued to surpass 2019 levels (+22%), while total room revenue was 39% higher. The occupancy rate in 2023 was 12% above where it stood in 2019 while the average daily rate was 14% higher.

Economy

↑ Tourism Business Vitality

There are more than 2,700 tourism businesses in the province according to Hospitality Newfoundland and Labrador. Even more impressive is that the survival rate of these tourism businesses has remained stable since 2017 at 93%—this, despite economic fluctuations in the tourism industry over that period, which included almost two years of various pandemic-related travel lockdowns. The province has a robust grants and funding program strategically aimed at supporting tourism-related businesses and initiatives, both through commercial funding programs like the Arts Infrastructure and Programming Fund to non-commercial ones like the Cultural Events Fund. There is also the Recreation and Sport Funding program that broadly supports travel and hosting opportunities.

St. John's, Newfoundland and Labrador

Employment

↑ Tourism Employment Growth

Newfoundland and Labrador has tapped into the global tourism economy, the fastest-growing industry in the world. The annual growth in tourism employment in the province increased by 20% in 2022, this is the largest annual growth recorded since 2016. Equally impressive is the location quotient of jobs (the concentration of tourism employment in a region relative to the national average) also increased 7% in 2022. It's a particular economic driver in rural areas and creates 20,000 much-needed jobs outside of the province's urban centres. Over the period of a decade, Newfoundland and Labrador's tourism industry has grown approximately 4% annually and today contributes more than $1.1 billion to the provincial economy. To ensure a pipeline of talent to keep tourism growing in the province, the "Tourism Re-skilling for Non-Tourism Sector Workers" program was launched in 2017 by the Government of Newfoundland and Labrador and administered by the College of the North Atlantic. Its provincially mandated goal is to provide a coordinated, central point of access to engage all labour market stakeholders about challenges, opportunities, and best practices in workforce development.

Engagement

↑ Cultural Resources

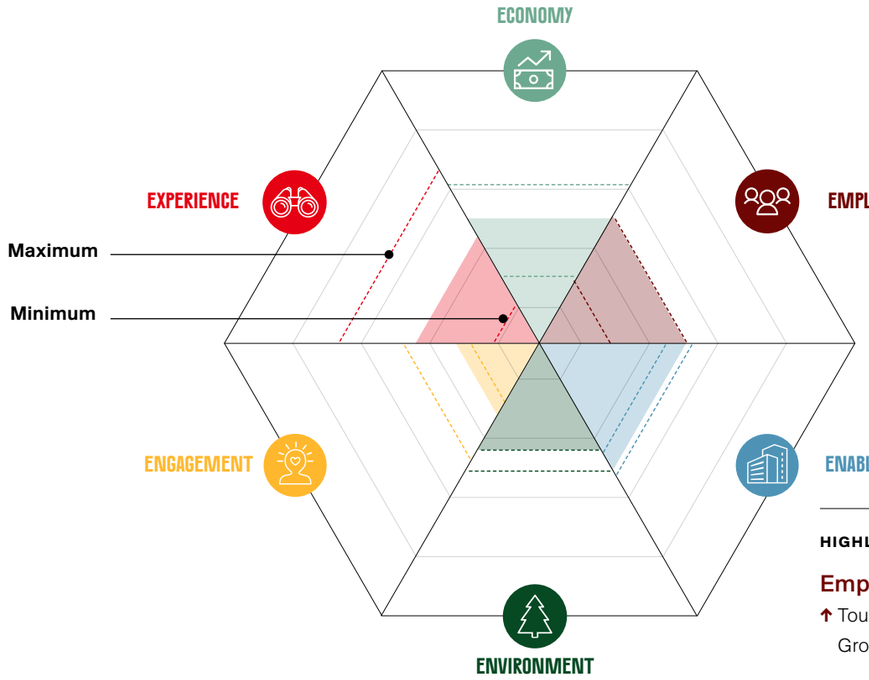
Given Newfoundland and Labrador's ancient strategic location as the closest point of North America to Northern Europe, the province is a living bounty of diverse Indigenous and European cultures and heritage. Today, myriad experiences, programs, and festivals showcase the cultural treasures and timeless sense of place across the province, thereby stoking the famed local pride of residents and the sustainable development of the visitor experience and the province's economy. UNESCO's prestigious global brand attracts visitors from around the world who are eager to experience designated and protected heritage sites of cultural significance. Nowhere is this more evident than in Newfoundland and Labrador's two UNESCO Cultural World Heritage Sites (part of the province's four World Heritage Sites and one GeoPark). In fact, Canada's inaugural UNESCO site, L'Anse aux Meadows National Historic Site, the Viking settlement at the tip of Newfoundland's Great Northern Peninsula, was the first real evidence that these European explorers had reached the New World over 1,000 years ago. On the mainland in Labrador, the Red Bay National Historic Site provides the earliest, most complete, and best-preserved testimony of the European whaling tradition, established in the 16th century by Basque mariners.

Fogo Island, Newfoundland and Labrador

Fogo Island Inn: A Beacon of Destination Stewardship

Few places in Atlantic Canada exemplify environmental commitments like Fogo Island Inn. This award-winning inn off the northeast coast of Newfoundland operates with a commitment to minimal environmental impact, using locally sourced materials and renewable energy. Its innovative Shorefast Foundation drives community-based initiatives, emphasizing cultural heritage and ecological preservation like the Geology at the Edge program, promoting geological education and conservation. The Inn's zero-waste philosophy is showcased through meticulous waste management practices and locally sourced cuisine, reducing food kilometres and supporting local agriculture. Fogo Island Inn's integration of sustainable practices with luxury tourism serves as a model, proving that eco-conscious development can enhance both community prosperity and visitor experience. This blend of sustainability and high-end hospitality is attracting global attention and investment in sustainable tourism across the region.

Boasting a resilient tourism workforce and an enviable quality of life (with some of the country's most affordable housing costs), New Brunswick is making room for the world to visit and ensuring a mutually beneficial experience for residents, too.



HIGHLIGHTS

Employment
↑ Tourism Employment Growth

Enablement
↑ Quality of Life

Environment
↑ Environmental Impact

Engagement
↑ Community Openness

Employment

↑ Tourism Employment Growth

In 2022, New Brunswick experienced its largest growth of tourism employment at 12%. The province is seeding the local industry for additional growth with initiatives like the New Brunswick portion of the Tourism Growth Program, as well as programs like the “Indigenous Women in Entrepreneurship: Investing and Empowering in Business and Communities” workshop dedicated to supporting Indigenous Women Entrepreneurs throughout Atlantic Canada. The interactive and participatory workshop explores best practices for building strong and resilient businesses, along with the support available to help participating Indigenous entrepreneurs achieve their business vision. This workshop is broken down into five modules ranging from business development to provincial support systems.

Environment

↑ Environmental Impact

New Brunswick’s environmental impact has been strategically and intentionally decreased, particularly in relation to greenhouse gas emissions and waste. From a high of 916 kilotonnes of greenhouse gas emissions from tourism industries in 2016, the province is down to 610 kilotonnes as of 2022. Waste disposed (tonnes per 1,000 people) has also declined from 659 in 2016 to 637 in 2022. According to the province’s Solid Waste Strategic Action Plan, the goal is that by 2030, New Brunswick will achieve an annual 40,000-tonne reduction in solid waste being regionally landfilled. The province is home to 24 provincial parks and over 26,000 hectares of protected and maintained land, managed by Parks NB. New Brunswick has also implemented aggressive water testing protocols across all provincial parks, earning three Blue Flag eco-certifications. Equally ambitious commitments are outlined in the 2022-2027 New Brunswick Climate Change Action Plan, titled ‘Our Pathway Towards Decarbonization and Climate Resilience. Efforts to naturalize parklands include planting over 250,000 native trees across nearly 50 hectares. Additionally, more than 5,000 students are engaged in parks’ climate change programs each year.

Enablement

↑ Quality of Life

Key indicators for the quality of life in New Brunswick are on an upward trend. The amount of greenspace in New Brunswick increased to 95% in 2022, wastewater treatment is up from 77% to 79% in 2022, and the crime severity index has declined from 88.5 in 2021 to 86.2 in 2022. Rent and housing are also relatively affordable for the growing tourism workforce. The average price of a home in New Brunswick, which sat under $300,000 at the end of 2023, is well below half the average price of the average Canadian home price of $703,000.

Engagement

↑ Community Openness

In New Brunswick, Indigenous survey respondents reported being treated with a higher degree of respect by non-Indigenous people compared to the Canadian average, according to the Indigenous Reconciliation Barometer. This positive sentiment has also increased significantly between 2021 and 2022. Initiatives like the recently released Indigenous Inclusivity Toolkit by JEDI (Joint Economic Development Initiative), an easy-to-use guide to help build Indigenous inclusivity in the New Brunswick workforce, are attempts at provincial skills development for continued economic growth of the province.

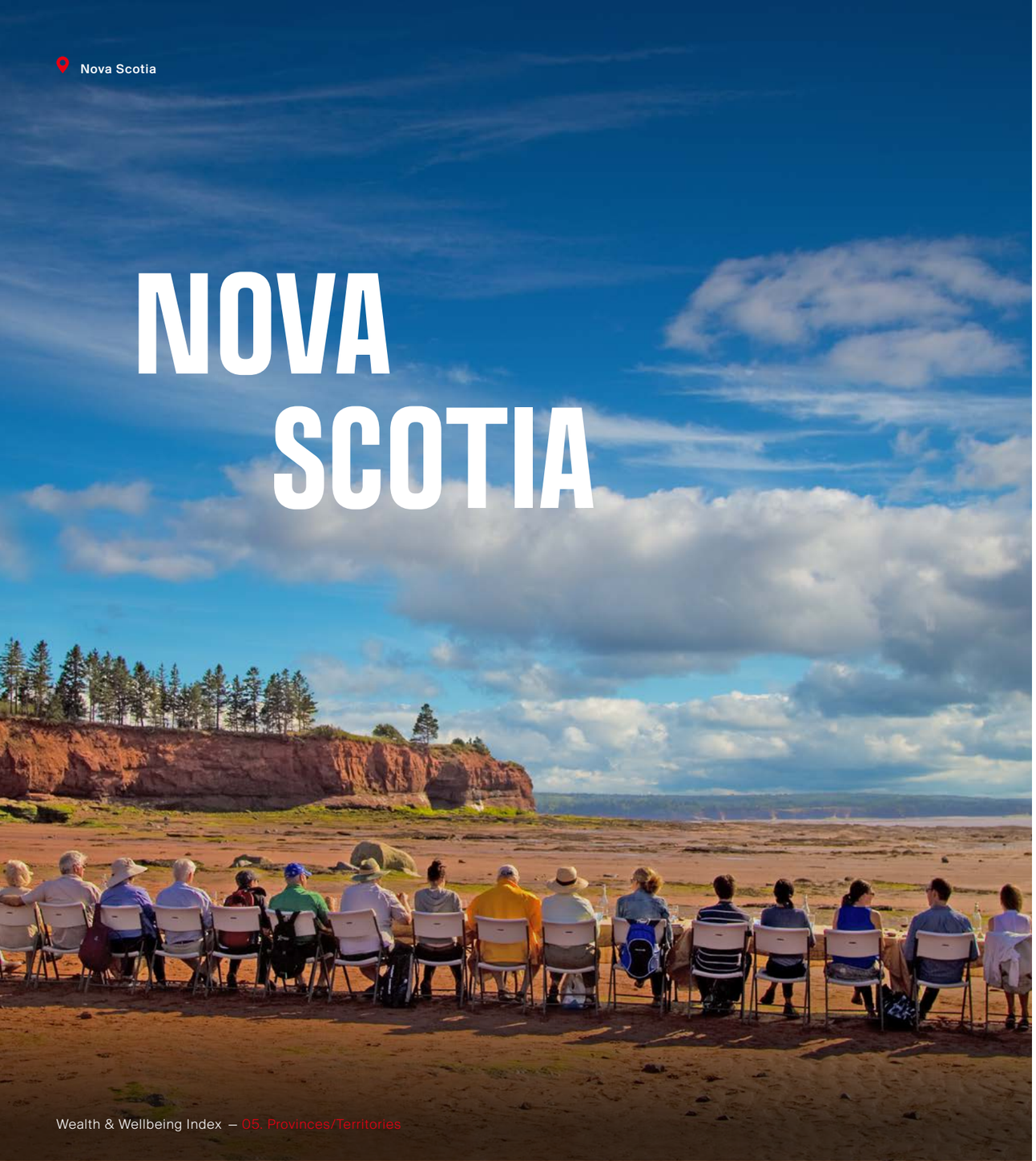
Cielo Glamping Maritime, Town Haut-Shippagan, New Brunswick]

New Brunswick

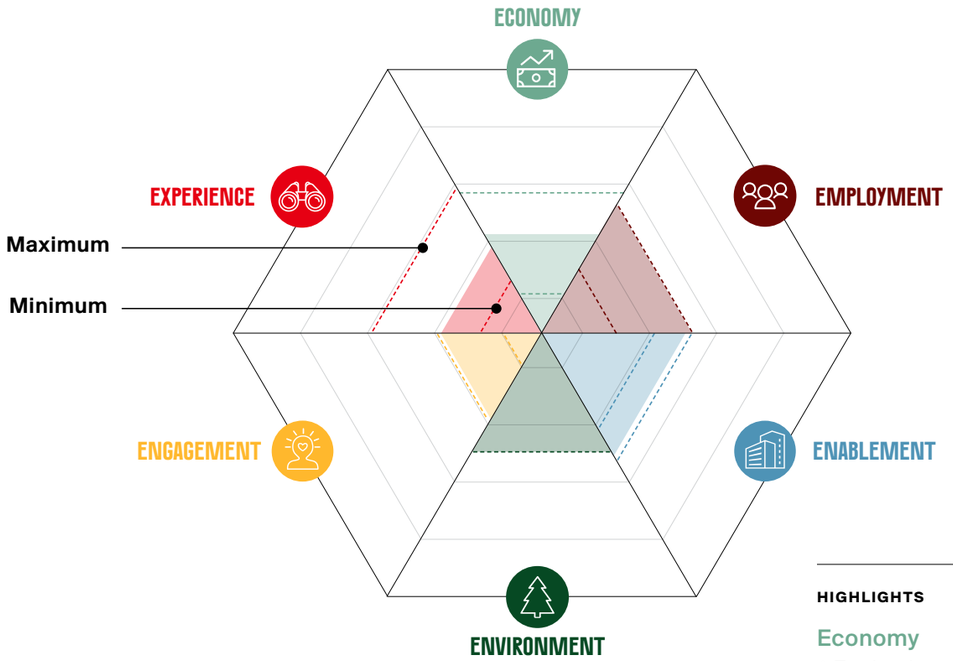
Immersive Acadian Culture

Pays de la Sagouine has been offering Acadian cultural experiences since 1992. The historic village and island on the eastern shore of the province is home to Antonine Maillet, internationally renowned Acadian playwright and author, whose home features characters who welcome visitors with theatre, music, comedy, and dance. Last year, the experience became even more immersive with the launch of the enchanted Lumina night trail: AKADI LUMINA, created by Montreal multimedia entertainment studio Moment Factory, their first project in Atlantic Canada.

NOVA SCOTIA



Skilled tourism talent today comprises 10% of the province's workforce...and is growing. Good thing, too, because with some of the country's most cost-competitive experiences, Nova Scotia is poised to leverage its UNESCO-recognized bounty in the decades ahead.



HIGHLIGHTS

Economy

↑ Tourism Investment Growth

Employment

↑ Tourism Employment Development

Engagement

↑ Cultural Resources

Economy

↑ Tourism Investment Growth

To support long-term planning, the Tourism Industry Association of Nova Scotia (TIANS) and Tourism Nova Scotia are co-leading the development of a new tourism sector strategic plan. It will establish a new vision for tourism and address factors such as seasonality, product development, workforce, and visitor experience. Nova Scotia is part of the Atlantic Canada Agreement on Tourism (ACAT), a $30 million partnership between the federal government and Atlantic provinces to strengthen the tourism sector in the region. As part of this agreement, Atlantic Canada Opportunities Agency will invest $18 million, and the four Atlantic provinces will invest $12 million collectively, over the next four-and-a-half-years. Previously, the Tourism Revitalization of Icons Program (TRIP) was a significant initiative for boosting tourism in Nova Scotia. It was a $6 million infrastructure funding program administered by Tourism Nova Scotia, aimed at revitalizing some of the province's most competitive tourism icons, including Peggys Cove, the Halifax waterfront, Cabot Trail, Bay of Fundy, Annapolis Royal, and the Lunenburg waterfront.

Employment

↑ Tourism Employment Development

The percentage of skilled tourism industry labour in Nova Scotia has seen an upward trend, moving from 18% in 2016 to 26% in 2022. As of the same year, the Nova Scotia tourism sector accounts for approximately 10% of the total employment in Nova Scotia, the same as the national tourism industry average. According to provincial projections for the four-year period between 2021 and 2025, overall employment in the tourism sector is projected to grow at a compounded annual rate of 6%. The leading industry in terms of growth is expected to be accommodation (at 12%).

Trout Point Lodge, Kemptville, Nova Scotia

Engagement

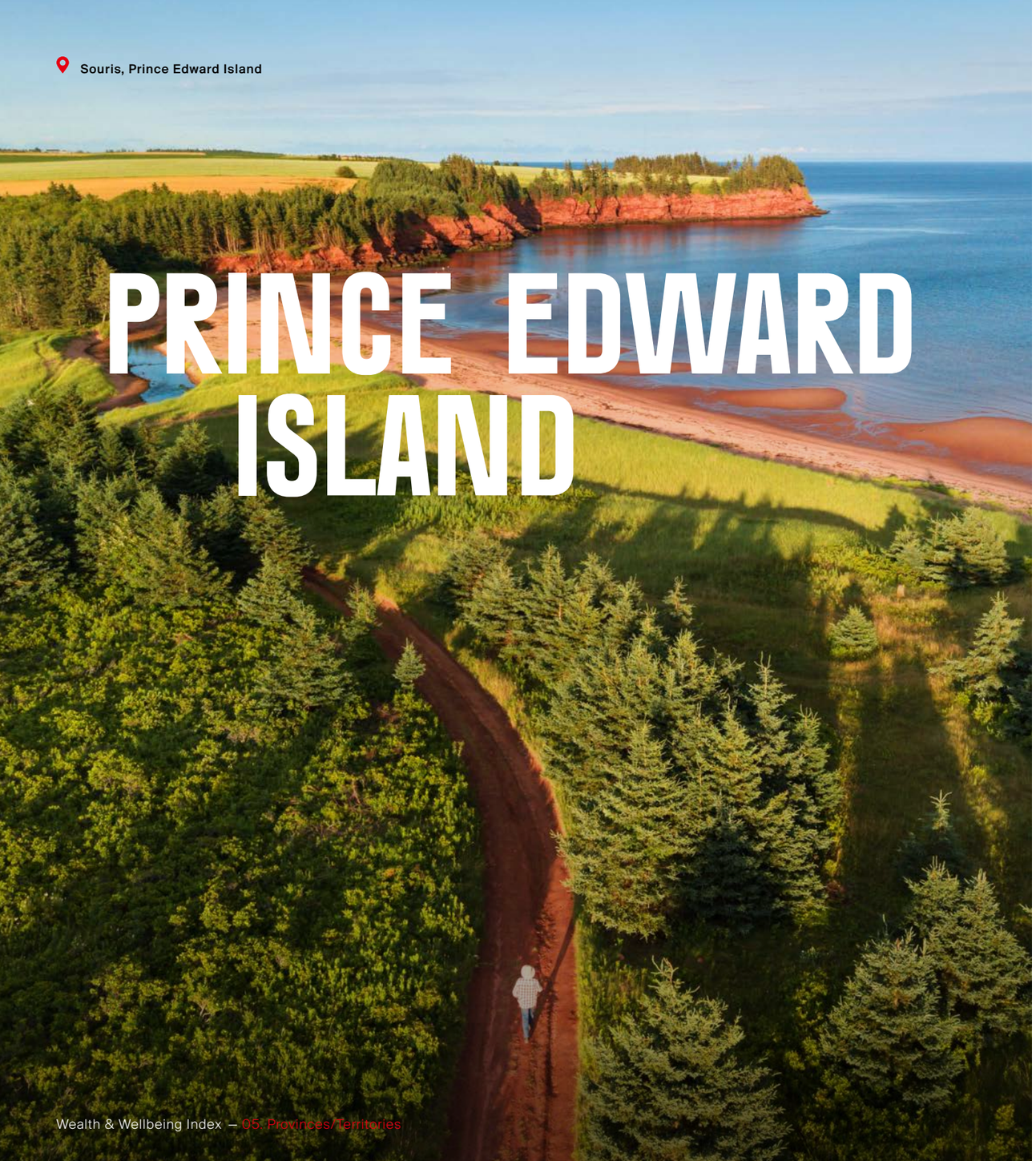
↑ Cultural Resources

Nova Scotia is known for its vibrant cultural landscape that encompasses diverse museums, galleries, and historical landmarks, reflecting the province's maritime heritage, Indigenous cultures, and Acadian traditions. The Fisheries Museum of the Atlantic, housed in a former fish processing plant in Lunenburg, is a prime example of how the region's fishing heritage is celebrated through immersive experiences that connect visitors to the province's seafaring past. Nova Scotia's cultural resources extend to numerous annual festivals and events that showcase its artistic talents and diverse communities. Events like the Halifax International Busker Festival, Celtic Colours International Festival, and Mi'kmaq Summer Games bring together local traditions, music, art, and performances, creating a vibrant atmosphere that celebrates the province's rich multicultural heritage. It is home to two UNESCO Cultural World Heritage Sites—Old Town Lunenburg and the Joggins Fossil Cliffs—as well as four other designated sites, making up a total of six UNESCO World Heritage Sites. These sites are part of a broader initiative known as the Atlantic Canada UNESCO Tourism Corridor, which also includes 11 other regional sites. The corridor aims to create a cohesive tourism strategy that highlights the region's unique heritage while promoting sustainable tourism growth. The strategy involves defining clear objectives, creating an implementation plan, and establishing funding opportunities that will help bolster these sites' preservation and tourism appeal.

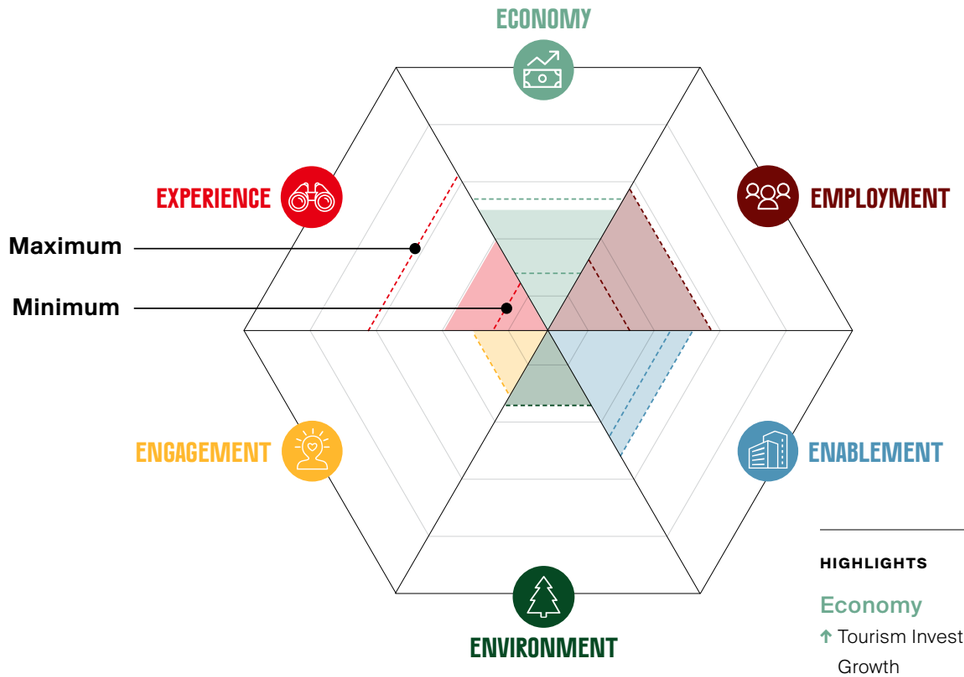
Lunenburg, Nova Scotia

Celebrating Nova Scotia's Rich Maritime Heritage

Nova Scotia's UNESCO World Heritage Sites are complemented by experiences like the Fisheries Museum of the Atlantic in Lunenburg. The museum, housed in a former fish processing plant, takes visitors behind the scenic streets to experience life in a re-created fishing community true to the area's cultural heritage and discover, up close, life at sea. There's even Lunenburg's last Grand Banks Schooner, Theresa E Connor, wharfside.



With a commitment to be a national green leader, Prince Edward Island is funding massive cleantech innovation and community-level projects in the pursuit of attracting like-minded visitors and talent in the years ahead.



HIGHLIGHTS

Economy

↑ Tourism Investment Growth

Experience

↑ Tourism Products

Environment

↑ Environmental Impacts

Economy

↑ Tourism Investment Growth

In 2022, Prince Edward Island experienced 149% annual growth in government investment in the tourism sector, fully recovering from declines during the pandemic and surpassing pre-pandemic averages. Strategically focused projects like the “Tourism Innovation Fund” assist in the research, development and market launch of new cultural tourism products. More recently, a new tourism strategy for Prince Edward Island was launched on April 19, 2024 at the Tourism Industry Association of PEI (TIAPEI) Industry Partner Day. This five-year strategy outlines the necessary initiatives to foster and support the development of a vibrant year-round destination for visitors choosing PEI for vacation, meetings, conventions and conferences, sports, family and friends, or events which will increase total annual tourism revenue in the primary season and increase visitation during the winter and shoulder seasons.

Environment

↑ Environmental Impact

Prince Edward Island’s environmental impact has lessened, particularly in relation to greenhouse gas emissions and waste. From a high of 125 kilotonnes of greenhouse gas emissions from tourism industries in 2016 down to 111 kilotonnes in 2022. Waste disposed (tonnes per 1,000 people) has also declined from 352 in 2018 to 346 in 2022. Provincial projects outlined in the province’s 2022’s “Building Resilience: Climate Adaptation Plan,” range from bicycle rebates and e-Bike incentives, to clean tech support that helps PEI reach its 2040 target of being the first province in Canada to reach net zero GHG emissions. Initiatives like the Cleantech Park, home to PEI’s future home for cleantech innovation, business, energy and education, are coming online this year.

Experience

↑ Tourism Product

Prince Edward Island boasts an average of 90 tourism experiences per 1,000 visitors. These experiences are ranked highly overall, with 86% receiving a high-quality score, among the highest rankings in Canada. The Government of Prince Edward Island offers a range of partnership and funding opportunities to support Prince Edward Island’s tourism industry and operators, from dispersion efforts like the Multi-Season Tourism Micro Grant Program, to $5,000 grants to upgrade the province’s iconic public beaches and their infrastructure to drive visits.

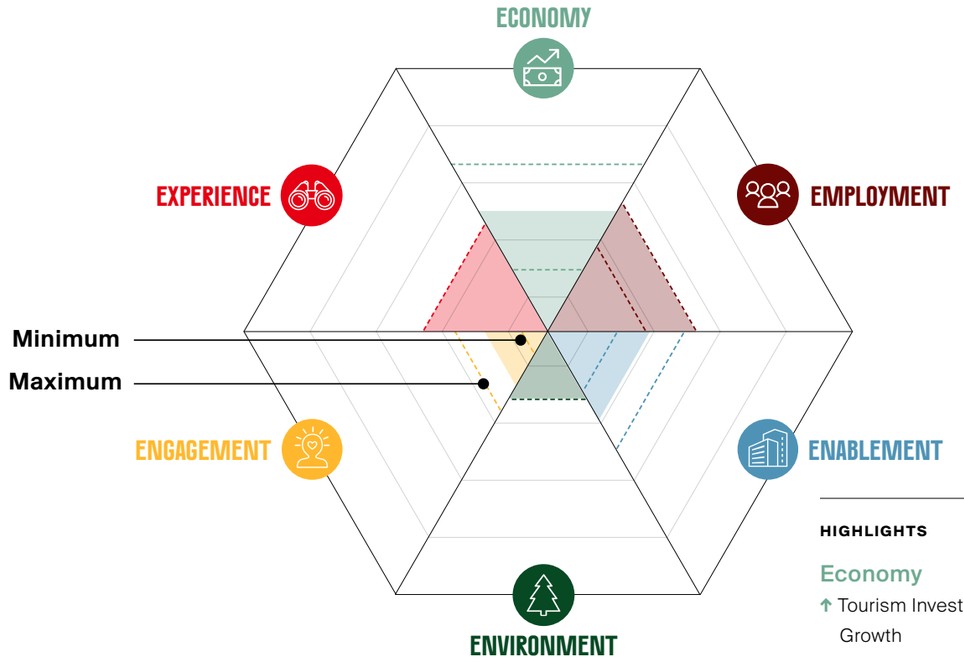
Island Lavender Distillery, St. Catherines, Prince Edward Island

Prince Edward Island

PEI Walks the Talk

Launched in the throes of the pandemic in the summer of 2020, PEI’s Island Walk is an opportunity to self-propel yourself and circumnavigate the entire province by foot. Its 32 sections and 700 kilometres take visitors along the ocean, much of the Confederation Trail, red dirt roads, beaches and through quiet secondary roads throughout PEI. Given the province’s ambitious emission-reduction goals, The Island Walk is an opportunity to immerse visitors and residents in the common mission.

With a collaborative, Indigenous-centred commitment to opening access to its natural bounty, Yukon is leading the way to strategically growing its visitors economy and positioning it to be among the highest-performing in the country over the next decade.



HIGHLIGHTS

Economy
- ↑ Tourism Investment Growth

Employment
- ↑ Tourism Employment Development

Environment
- ↑ Natural Assets

Engagement
- ↑ Community Openness
- ↑ Cultural Vibrancy

Economy

↑ Tourism Investment Growth

Since 2021, the Yukon has seen a significant upward trend in the amount of government funding going towards the tourism industry. From 2019 to 2022 public investment rose by 35%. Recent programs like the “Spark Tourism Microgrant” program support the development of new and emerging entrepreneurs offering visitor experiences and services within the Yukon’s tourism sector with grants between $1,000 to $5,000. Larger still are programs like the “Community Tourism Destination Development Fund” and its $1.6 million annual allocation to provide support to capital and non-capital projects that focus on sustainable tourism development in their community or region, ranging from up to $100,000 to $500,000.

Engagement

↑ Community Openness

In the Northern Territories, Indigenous survey respondents reported being treated with a higher degree of respect by non-Indigenous people compared to the Canadian average, according to the Indigenous Reconciliation Barometer. Indigenous survey respondents feel that there is a high level of non-Indigenous community engagement with Indigenous causes and communities in the Northern Territories. A provincial leader in dialogue and collaboration in the visitors economy is the Yukon First Nations Culture and Tourism Association (YFNCT), a non-profit, stakeholder-based organization that is committed to growing and promoting vibrant and sustainable arts/culture and tourism sectors. To further support local community development, the Yukon government introduced the Rugged Apprentices, a unique voluntourism initiative run that brings volunteers from across Canada to work on tourism-related community projects in various Yukon communities.

Environment

↑ Natural Assets

The Yukon has over 30 Indigenous tourism experiences, a high proportion relative to its population and, as a result, among the top in this indicator relative to other provinces and territories. According to the Indigenous Reconciliation Barometer, survey respondents from the Northern Territories rate Indigenous individuals, communities, and cultural welfare higher on average than other areas of Canada. In 2021, nearly 1% of the Yukon population reported having an Indigenous language as their only mother tongue. Initiatives like The Northern Indigenous Lodge Network Corridor (one of three corridors being supported through Destination Canada’s Tourism Corridor Strategy Program) are responsibly and sustainably harnessing the growing global demand for authentic Indigenous tourism products and experiences by tackling the chronic shortage of accommodations for guests. The Northern Indigenous Lodge Network Corridor project seeks to create a strategy, financial plan, and implementation plan for the development of Indigenous lodges throughout the Yukon, western Northwest Territories, and northern B.C.

Engagement

↑ Cultural Vibrancy

The Yukon has over 30 Indigenous tourism experiences, a high proportion relative to its population and, as a result, among the top in this indicator relative to other provinces and territories. According to the Indigenous Reconciliation Barometer, survey respondents from the Northern Territories rate Indigenous individuals, communities, and cultural welfare higher on average than other areas of Canada. In 2021, nearly 1% of the Yukon population reported having an Indigenous language as their only mother tongue. Initiatives like The Northern Indigenous Lodge Network Corridor (one of three corridors being supported through Destination Canada’s Tourism Corridor Strategy Program) are responsibly and sustainably harnessing the growing global demand for authentic Indigenous tourism products and experiences by tackling the chronic shortage of accommodations for guests. The Northern Indigenous Lodge Network Corridor project seeks to create a strategy, financial plan, and implementation plan for the development of Indigenous lodges throughout the Yukon, western Northwest Territories, and northern B.C.

Employment

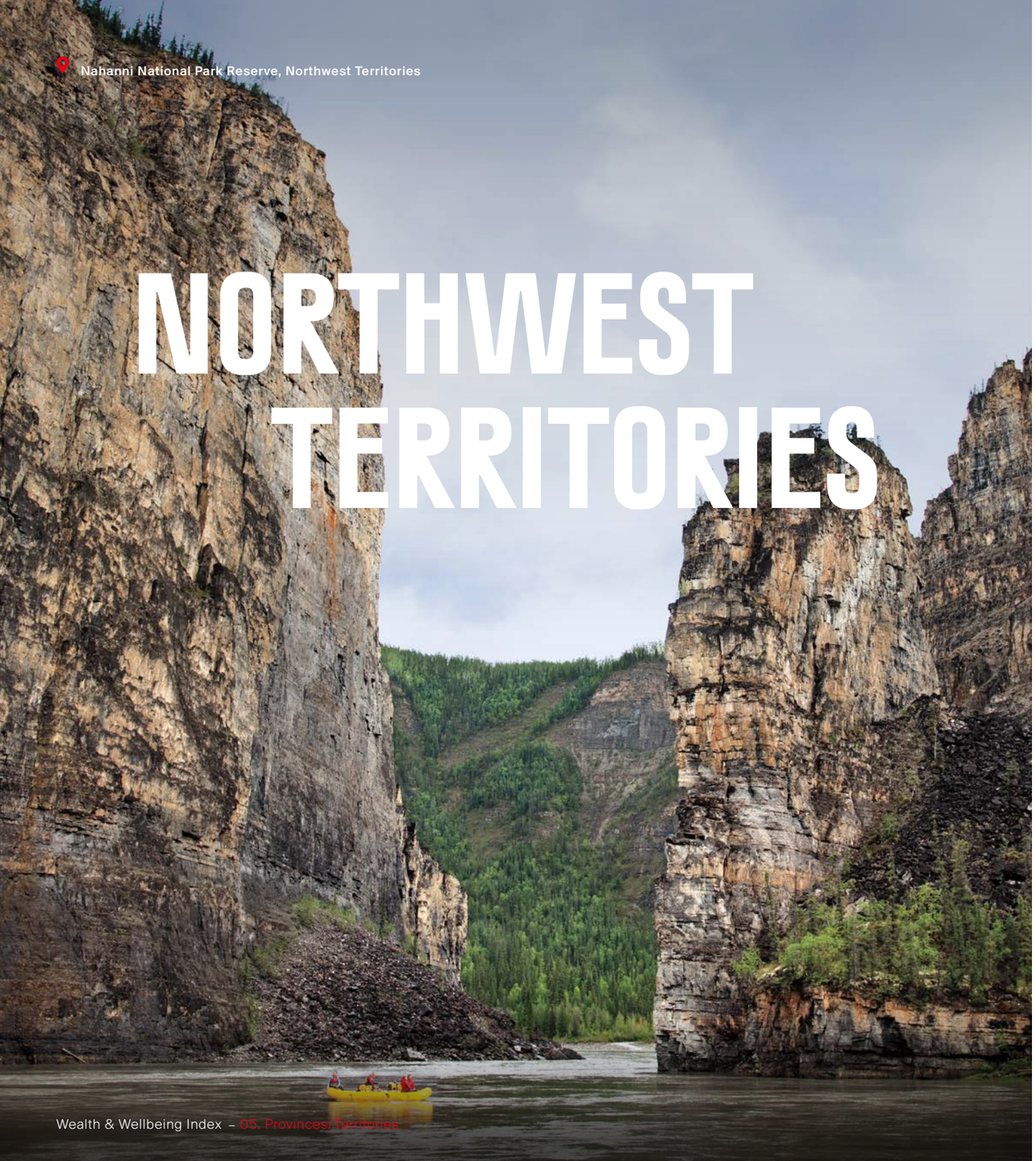
↑ Tourism Employment Development

The percentage of skilled labour in the Yukon has been on an upward trend since 2016, moving from 26% to 28% in 2021. Tourism GDP per job has also increased from $31,473 in 2017 to $38,220 in 2019. Further tourism economy skills development and resiliency is being stewarded by the Yukon Recruitment & Retention Taskforce (administered by TIA Yukon and in collaboration with the Yukon Chamber of Commerce, the Whitehorse Chamber of Commerce, and other Yukon organizations focusing on labour-related issues). With marketplace research and stakeholder surveys, the group helps attract reliable, qualified workers to ensure that businesses and organizations are able to operate effectively. And even visitors are getting involved: The new “Rugged Apprentices” initiative was set up to improve infrastructure in Yukon communities so travellers and locals alike can keep enjoying the territory’s amazing activities and wilderness. With shovels, rakes, and drills in hand, Rugged Apprentices head into Yukon communities to connect with locals and help with a variety of projects across the territory.

Carcross/Tagish Cultural Centre, Yukon

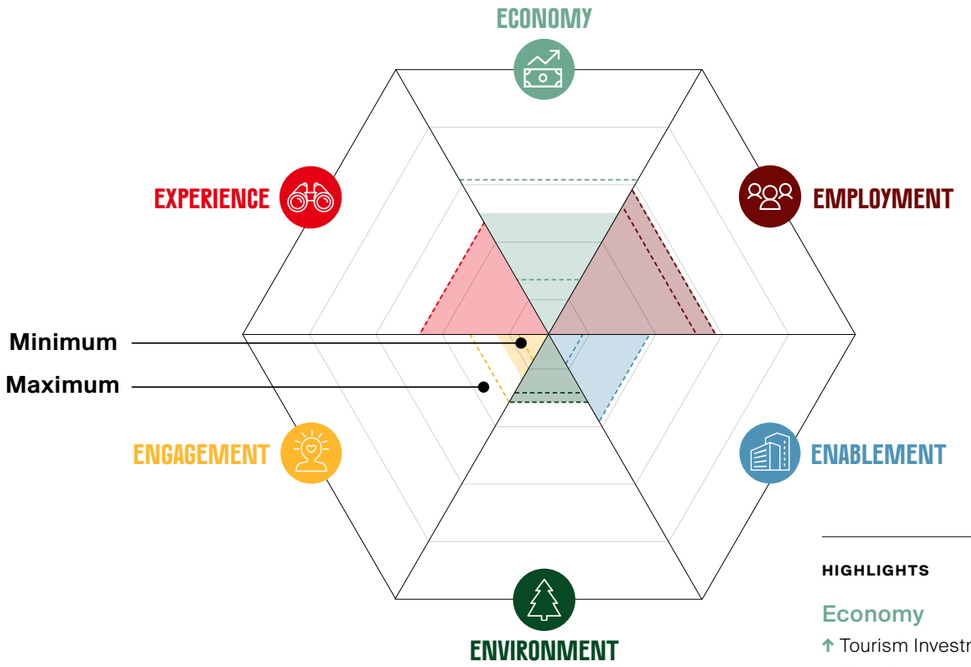
Yukon’s Indigenous Knowledge is Here

Opened in 2017, Haa Shagóon Hídi—Our Ancestors’ House—stands as a beacon of cultural heritage on the Traditional Territory of the Carcross/Tagish First Nation. This stunning timber-framed structure, designed to resemble a traditional longhouse, offers visitors a deep connection to the rich history and traditions of the Carcross/Tagish people. It has become one of the Yukon’s premier event venues, hosting a wide range of gatherings, from weddings and potlatches to corporate events. Located just a short 10-minute walk away, the Carcross Commons serves as a lively cultural hub, featuring a variety of local shops that showcase the artistry and craftsmanship of the community.



NORTHWEST TERRITORIES

Sustained robust growth in both public and private visitor economy investment is unlocking a global curiosity for outdoor and Indigenous visitors experiences and putting The Northwest Territories on international bucket lists.



HIGHLIGHTS

Economy
- ↑ Tourism Investment Growth

Engagement
- ↑ Community Openness
- ↑ Cultural Representation

Environment
- ↑ Natural Assets

Economy

↑ Tourism Investment Growth

The Northwest Territories have seen an upward trajectory in both private and public tourism investment in recent years. In 2022, private investment in the tourism industry increased by 22% and public investment increased by 28%. The funding available is as diverse as the visitor economy initiatives in the Northwest Territories. “The Community Tourism Infrastructure Contribution Program” was created to enhance NWT community tourism assets to encourage people to visit and stay longer in communities by encouraging partnerships between non-government organizations and private industry in the tourism sector; increase the use of communications technology in tourism products; and enhance the local tourism economy, with successful applicants receiving up to $200,000 (or 50% of project costs) in funding. Smaller growth initiatives range from the “Tourism Business Mentorship Program” featuring in-person and virtual mentoring by industry vets, to “Tourism Safety Planning” for operators.

Engagement

↑ Community Openness

In the Northern Territories, Indigenous survey respondents reported being treated with a higher degree of respect by non-Indigenous people compared to the Canadian average, according to the Indigenous Reconciliation Barometer. Half of the NWT’s population is Indigenous. Initiatives like Indigenously owned Aurora Village, on the Ingraham Trail near Yellowknife and one of the best places on the planet to see the Northern Lights, is an example of the local innovation growing the tourism economy here.

Engagement

↑ Cultural Representation

The Northwest Territories have 15 Indigenous tourism experiences, a high proportion relative to other provinces and its population. In all 33 communities across the territory, traditional ways of life and knowledge endure. Given the rise in global demand for Indigenous immersive cultural experiences, the Northwest Territories are poised to grow their ancestral tourism products, from culinary experiences to a variety of accommodations to Indigenous arts and festivals.

Environment

↑ Natural Assets

The Northwest Territories is an outdoor playground with some of the planet’s most vivid Aurora Borealis, the deepest lake in North America, and some of the continent’s most epic rivers. NWT has eight designated parks and conservation areas, 13 terrestrial and freshwater ecoregions, and two UNESCO Natural World Heritage Sites.

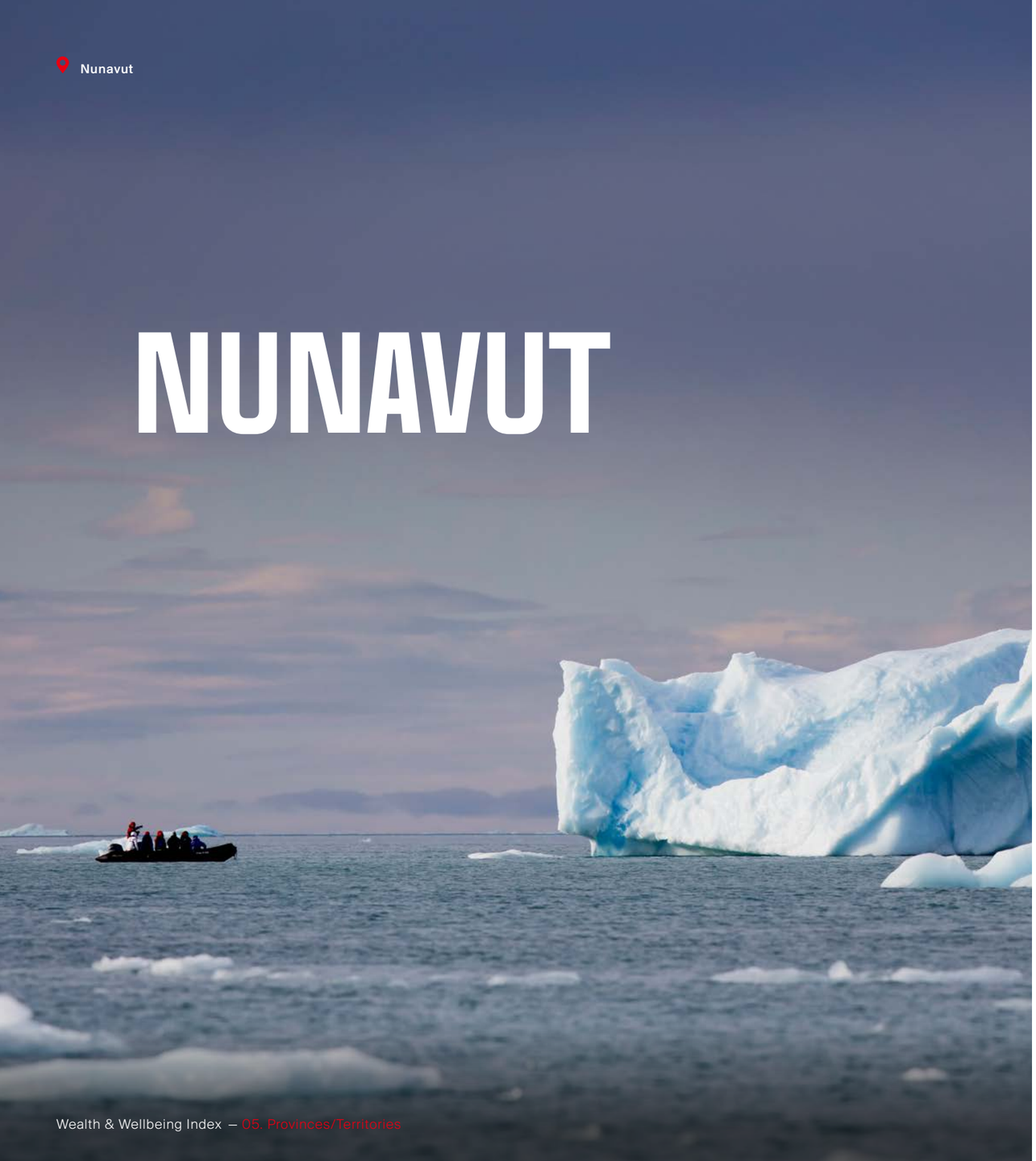
Yellowknife, Northwest Territories

Great Northern Arts Festival, Inuvik, Northwest Territories

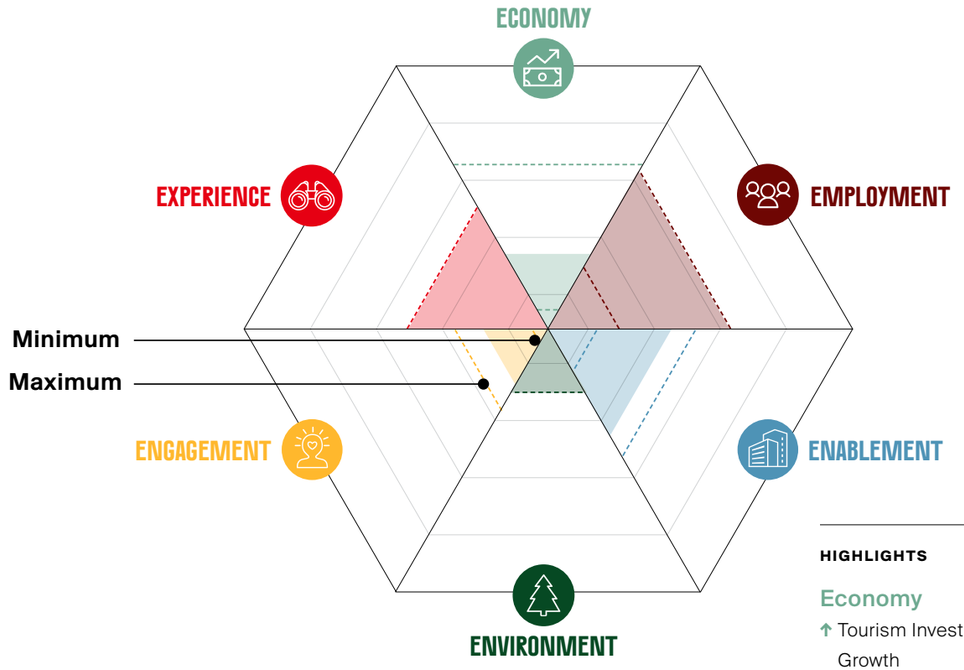
North America’s Longest-running Festival of Arctic Art and Music

The Great Northern Arts Festival has been held on the lands of the Gwich’in and Inuvialuit people in Inuvik, Northwest Territories, every summer since 1989. Up to a hundred artists make the journey to Inuvik from Nunavut, the Yukon, and around the Northwest Territories to create new work, nourish new collaborations, and share diverse cultures. The main stage features world-class performances, from the traditional songs of Inuvialuit and Dene drummers and dancers to legendary singers like Willie Thrasher and Louie Goose. There’s also plenty of rising talent, too, with artists like Tanya Tagaq and Leela Guilday performing here before breaking big globally.

NUNAVUT



This year marks the 25th anniversary of Nunavut as Canada's newest territory, and the growing visitor economy and skilled tourism workforce are more closely tied to its ambitious future than ever. Nunavut is making tourism a foundation of its economic resilience, supported by increased public investment and a strong focus on growing its tourism sector.



HIGHLIGHTS

Economy
- ↑ Tourism Investment Growth

Employment
- ↑ Tourism Employment Development

Engagement
- ↑ Cultural Representation

Experience
- ↑ Tourism Products

Environment
- ↑ Natural Assets

Economy

↑ Tourism Investment Growth

Nunavut's tourism industry received an increase of 18% in public funding in 2022. The Government of Nunavut has several funding programs accessible by the tourism sector, including the comprehensive "Community Tourism and Cultural Industries Program" which strengthens community infrastructure and readiness for tourism, and enhances economic development in sectors such as music, digital media, writing and performing arts. Its three streams are designed to help businesses across their growth: "Getting Started, Arts Creation and Training," "Product Development and Marketing," and, for established businesses, "Infrastructure Improvement" to add value to the cultural and tourism operations. Infrastructure investments have recently been made in upgrading airports and improving transportation networks to make Nunavut more accessible. This includes modernizing facilities and expanding services in key hubs like Iqaluit, Rankin Inlet, and other communities.

Experience

↑ Tourism Products

Visitors rate 82% of tourism products in Nunavut at a high quality, according to Tripadvisor. This positive feedback reflects the territory's unique and authentic experiences. Travel Nunavut is actively collaborating with the federal government to secure support for infrastructure improvements, including the development of deep-sea ports and small craft harbours. These enhancements will not only boost access but also enable the region to better accommodate growing visitor interest. In response to the increasing demand, there is a focus on expanding and upgrading lodges, hotels, and other accommodations, ensuring they meet the evolving preferences of travellers while preserving the cultural and natural integrity of Nunavut.

Employment

↑ Tourism Employment Development

The percentage of skilled labour has experienced an upward trend in Nunavut going from 9% in 2016 to 11% in 2022. This aligns with an increase of tourism GDP per job, which has expanded from $36,020 in 2017 to $45,281 in 2019. Travel Nunavut has recently shared their vision to grow the travel sector into a $1 billion industry with 5,000 jobs by 2030, while Ottawa has called much-needed Inuit involvement in tourism an "economic reconciliation driver" that could reconnect youth with Inuit traditions.

Engagement

↑ Cultural Representation

Nunavut has one of the highest rates of residents speaking multiple languages in Canada at 40%. It only makes sense, given that 85% of Nunavut's residents are Inuit. This is particularly applicable in the territory's tourism industry. Travel Nunavut, a membership-based association that represents hotels, outfitters, airlines and artists, has 147 members, with 77 being Inuit-owned businesses. The Wrecks of HMS Erebus and HMS Terror National Historic Site is the first national historic site to be jointly managed by Inuit and Parks Canada, with Inuit knowledge a vital part of experiencing the discoveries of the shipwrecks from Sir John Franklin's legendary 1845 expedition.

Nunavut

Environment

↑ Natural Assets

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Iqaluit, Nunavut

Bring the Nunavut Story to the World

The arts and creative industries are central to Nunavut's cultural, tourism, and hospitality sectors. At 40 times the national average, Nunavut has the highest per capita concentration of artists in Canada, with artists making up 33% of the Nunavut work force.

Art created by Nunavummiut artists has a worldwide reputation. ISUMA, an Inuit-owned collective based in Igloolik, Nunavut, has produced influential Inuit-language films and media since 1990. Their works, such as "Atanarjuat The Fast Runner," have received international acclaim, including awards at Cannes and TIFF1. ISUMA also launched IsumaTV, a platform showcasing more than 7,000 Indigenous media works. Notable projects include the feature "Maliglutit" and TV series "Hunting With My Ancestors." ISUMA's efforts spotlight Inuit culture, making Nunavut a unique destination for cultural tourism. In recognition of their significant contributions to Indigenous art and media, ISUMA was chosen to represent Canada at the 2019 Venice Biennale.

Empowering the Future of Tourism

As we look ahead to the future of tourism in Canada, the Wealth & Wellbeing Index will be a critical tool in guiding our path towards sustainable growth and inclusive prosperity. This comprehensive measurement framework enables us to track our progress while identifying areas for improvement and innovation.

We encourage you to explore the Wealth & Wellbeing Index further through the Canadian Tourism Data Collective. It provides timely data and enables deeper analysis, empowering us all to make informed, impactful decisions.

To address data gaps and enhance the richness of our insights, we invite you to collaborate with us. Your participation and feedback are vital to refining the Wealth & Wellbeing Index and ensuring it accurately reflects the diverse realities of Canada's tourism sector. Together, we can build a comprehensive, data-driven understanding of tourism that supports informed decision-making and strategic planning. Let's work together to fill data gaps, innovate, and think differently about the future of tourism in Canada.

https://www.tourismdatacollective.ca/wealth-wellbeing

CHAPTER 06

Colin Field Paddling, Nahanni, Northwest Territories

TECHNICAL NOTES

Economy

Tourism businesses are prosperous, deeply embedded in and generate wealth for communities

→ 7 categories, 24 indicators

KEY INDICATOR

Growth in tourism GDP

Economic metrics gauge the growth, innovation, and resilience of the tourism sector, alongside the prosperity it brings to communities. The extent of support and investment in this sector fuels the ability of local businesses to expand and thrive.

INDICATORS

→ **Tourism Growth –** Annual growth in tourism GDP, annual growth in tourism share of GDP, and annual growth in visitor spending

→ **Tourism Business Vitality** – Total number of tourism businesses, birth rate of tourism businesses, and tourism business survival rate

→ **Tourism Business Diversity** – Cluster location quotient of tourism businesses and supporting businesses, share of female tourism business owners, share of immigrant tourism business owners, and share of Indigenous tourism businesses

→ **Tourism Investment** – Government investment in the tourism sector, total funding in Indigenous tourism, and private investment in the tourism sector

→ **Tourism Investment Growth** – Annual growth in government investment in the tourism sector, annual growth in funding for Indigenous tourism, and annual growth in private investment in the tourism sector

→ **Tourism Performance** – Total international business event revenue, total visitor spending, tourism GDP, and tourism's share of total GDP

→ **Tourism Yield** – Average spending per visitor, revenue per available room, T&T GDP Multiplier, and seasonality

Employment

Tourism jobs are coveted and inclusive of diverse people and geographies

→ 5 categories, 13 indicators

KEY INDICATOR

Share of unfilled vacancies

Employment focuses on the industry's overall reputation, accessibility, and inclusivity, encompassing the availability of a skilled local workforce and the formulation of supportive policies. The sector's image, shaped by professional opportunities and workplace standards, plays a crucial role in its capacity to attract talent.

INDICATORS

→ **Tourism Employment Development** – Tourism GDP per job, percentage of skilled labour, and enrollment rate in high school tourism and hospitality programs

→ **Tourism Employment Diversity** – Share of immigrants employed in tourism, share of female employment in tourism, and learning quotient of tourism jobs

→ **Tourism Employment Growth** – Annual growth in tourism employment and growth in LQ of tourism jobs

→ **Tourism Employment Supply** – Tourism Employment, tourism labor force retention rate, and share of unfilled vacancies

→ **Tourism Industry Attractiveness** – Perception of tourism as a career and difference between average wage for tourism jobs and all jobs

Enablement

Tourism flourishes with the development of quality infrastructure

→ 6 categories, 26 indicators

KEY INDICATOR

Air connectivity Score

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. National and regional connectivity relies on major infrastructure investments to improve accessibility to both visitors and residents.

INDICATORS

→ **Business Ecosystem** –Number of large businesses, number of universities in the world's top 1,000 QS ranking, and number of international conferences

→ **Digital Readiness** – Use of digital platform for providing hotels, internet network access, and mobile network access

→ **International Openness** – Number of immigrants, number of international visitors, number of international students, and the level of openness towards other nationalities

→ **Quality of Life** – Crime rate, housing affordability, average greenness, number of hospital beds per capita, wastewater treatment capacity, and long-term drinking water advisories

→ **Tourism Service Infrastructure** – Number of leisure experiences, size of largest convention centre, total number of meeting/event venues, spectator sports stadium capacity, total number of hotel rooms, and total number of short-term rentals

→ **Tourism Transportation System** – Air connectivity score (international, inter-provincial, intra-provincial), railroad connectivity, road connectivity, and share of residents taking public transport to work

Environment

Tourism operates in harmony with ecological abundance and rebalancing of the carbon cycle

→ 3 categories, 11 indicators

KEY INDICATOR

GHG emissions per visitor

Environment examines the impact of tourism on ecosystem regeneration and resource conservation, through indicators like the number of environmental treaty ratifications and the proportion of energy derived from renewable sources. This multi-faceted approach underscores tourism's reliance on, and contribution to, environmental stewardship and sustainable development.

INDICATORS

→ **Tourism Sustainability** – Number of environmental treaty ratifications, investment in green energy and infrastructure, share of renewable energy sources, and respect for the natural world

→ **Environmental Impact** – Greenhouse gas emissions from tourism industries, greenhouse gas emissions per visitor, Climate Risk Index, and waste disposed per population

→ **Natural Assets** – Number of National Parks, Provincial Parks, UNESCO Biospheres, UNESCO Geoparks, Dark Sky Reserves, and national marine conservation areas, terrestrial and freshwater ecoregions, and number of UNESCO Natural World Heritage Site

Engagement

Local cultures thrive, are rooted in community and welcome the world

→ 4 categories, 18 indicators

KEY INDICATOR

Share of Canadians who recognize tourism's contribution to quality of life

Engagement honours diverse languages and cultures through a variety of experiences, events, and programs, showcasing the richness of cultural resources. The growth of tourism is intricately linked to a community's welcoming attitude towards visitors, emphasizing the importance of both the community's perception of tourism and its economic contributions. This mutual benefit is crucial for fostering sustainable development.

INDICATORS

- **Cultural Resources** – Number of oral and intangible cultural expressions, number of UNESCO Creative Cities, and number of UNESCO Cultural World Heritage sites
- **Community Openness** – Share of Canadians who recognize tourism's contribution to quality of life, share of Canadians who recognize tourism's contribution to the economy, visitors per 1,000 population and visitors per sq km, Indigenous engagement, and mutually respectful relationships
- **Cultural Representation** – Language diversity (% people speak a 2nd language home), diversity index, perception of the representation of Indigenous cultures, knowledge of French/ English, and Indigenous thriving
- **Cultural Vibrancy** – Number of restaurants and culinary experiences, financial support for cultural tourism initiatives/arts and culture funding, number of cultural tourism experiences, and number of Indigenous experiences

Experience

Guests are transformed by rich experiences that distinguish Canada in the world

→ 5 categories, 18 indicators

KEY INDICATOR

Share of target audience returning to Canada

Experiences are fundamental to defining a destination's brand and its overall value, which are determined by both the quality and competitiveness of the visitor experience. Online content plays a crucial role in shaping visitors' perceptions, sparking interest, and encouraging visits from target travellers. The value derived from these experiences is a key factor in encouraging guests to return.

INDICATORS

- **Cost of Travel** – Taxes and airport charges, hotel price index and purchasing power parity
- **Place Brand** – Destination Index and Country Brand Strategy rating
- **Tourism Products** – Share of quality experiences, share of quality hotels, share of tourism businesses providing universal access, hotel rooms per 1,000 visitors, and experiences per 1,000 visitors
- **Travel Demand** – Geographically dispersed tourism, demand search for Canada and destinations, earned media coverage of Canada travel, earned media coverage of Indigenous experiences, number of Google travel searches by destination, and length of stay
- **Visitor Experience** – Target audience spending and share of target audience returning to Canada

Glossary

Economy

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Tourism Performance	Tourism GDP	Statistics Canada, National Tourism Indicators	Q32023	This indicator measures the total value of goods and services produced by tourism industries, in a specific region, during a given period.
	Tourism's share of total GDP	Statistics Canada, National Tourism Indicators	2019	This indicator measures the share of GDP generated by tourism industries to the total GDP generated by all industries in an economy.
	Total visitor spending	Statistics Canada, National Tourism Indicators	Q3 2023	This indicator measures the total expenditure by all non-resident visitors in a region, during a given period.
	Total international business event revenue	Statistics Canada, National Tourism Indicators	Q2 2023	This indicator measures the total expenditure of international delegates attending business events.
Tourism Growth	Annual growth in tourism GDP	Statistics Canada, National Tourism Indicators	Q2 2023	This indicator measures the annual growth in the value of goods and services produced in tourism industries, in a specific region.
	Annual growth in tourism's share of GDP	Statistics Canada, National Tourism Indicators	Q3 2023	This indicator measures the annual growth in the value of goods and services produced by tourism industries, in a specific region.
	Annual growth in visitor spending	Statistics Canada, National Tourism Indicators	Q3 2023	This indicator measures the annual growth in the total expenditure by all non-resident visitors in a specific region.
Tourism Yield	Average spending per international visitor	Statistics Canada, National Tourism Indicators	2022	This indicator measures the average tourism expenditure per all non-resident visitors in a specific region, during a given time period.
	RevPAR	STR	2022	This indicator measures revenue generated per available room, whether or not they are occupied.
	T&T GDP Multiplier	Statistics Canada, National Tourism Indicators	2022	This indicator measures the ratio of indirect and induced tourism gross domestic product to direct travel and tourism gross domestic product, in a specific region, during a given time period.
	Seasonality of tourism	Destination Canada, LASR	2023	This indicator measures the peak period share of total yearly visitor spending.
Tourism Investment	Private investment in the tourism sector	Statistics Canada, Tourism Investment Module	2022	This indicator measures the total spending on capital assets by tourism businesses in the private sector.

Glossary

Economy continued

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Tourism Investment	Government investment in the tourism sector	Statistics Canada, Tourism Investment Module	2022	This indicator measures the total spending on capital assets by tourism businesses in the private sector.
	Total funding in Indigenous tourism	ITAC	2021	This indicator measures the total budget of Provincial and Territorial Indigenous Tourism Organizations (PTITOs).
Tourism Investment Growth	Annual growth in private investment in the tourism sector	Statistics Canada, Tourism Investment Monitor	2021	This indicator measures the annual growth in the total spending on capital assets by tourism businesses in the private sector.
	Annual growth in government investment in the tourism sector	Statistics Canada, Tourism Investment Monitor	2021	This indicator measures the annual growth in the total spending on capital assets by tourism businesses in the public sector.
	Annual growth in funding in indigenous tourism	ITAC	2021	This indicator measures the growth in the total budget of Provincial and Territorial Indigenous Tourism Organizations (PTITOs).
Tourism Business Vitality	Number of tourism businesses	Statistics Canada	Nov 2023	This indicator measures the total number of active tourism businesses in a specific region, at a given time. A business is defined as active in the tourism industry if at any given month, it has at least one employed person. This includes businesses that have been operational in previous months, as well as businesses that newly opened or reopened.\
	Birth rate of employer enterprises	Statistics Canada	Nov 2023	This indicator measures the rate of formation of businesses in the tourism industry. It is the ratio of businesses opened to the total operational businesses in a region at year end.
	Tourism business survival rate	Statistics Canada, Business Register at location level	Nov 2023	This indicator measures the average share of businesses that have remained operational for at least two months in a specific year. It is first calculated by finding the monthly business survival rate (1-rate of monthly closures) throughout the year, in order to arrive at an average business survival rate per year.
Tourism Business Diversity	Cluster location quotient of tourism businesses and supporting businesses	Statistics Canada, Longitudinal Employment Analysis Program	Nov 2023	This indicator measures a region's share of businesses in tourism relative to the number of tourism businesses at the national level.
	Share of female tourism business owners	Statistics Canada, Canadian Survey of Business Conditions	2023	This indicator measures the share of female business owners in the tourism industry.
	Share of immigrant tourism business owners	Statistics Canada, Canadian Survey of Business Conditions; iTotem	2023	This indicator measures the share of immigrant business owners in the tourism industry.
	Share of indigenous tourism businesses, % of total tourism businesses	Statistics Canada, Canadian Survey of Business Conditions; iTotem	2023	This indicator measures the share of indigenous business owners in the tourism industry.

Glossary

Employment

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Tourism Employment Supply	Total tourism employment	Tourism HR	2023	This indicator measures the total number of people employed in the tourism industry in a specific region, by year end.
	Tourism worker retention rate	Tourism HR	2023	This indicator measures the ratio of tourism workers at year end to tourism workers at the start of the year.
	Share of unfilled vacancies	Statistics Canada, Job Vacancy and Wage Survey	Q3 2023	This indicator measures, on average, the share of job vacancies relative to the total labor demand for all industries in a region
Tourism Employment Growth	Annual growth in tourism employment	Tourism HR	2021	This indicator measures the annual change in the total number of people employed in the tourism industry in a specific region, by year end.
	Growth in LQ of tourism jobs	Tourism HR	2021	This indicator measures the yearly growth in the ratio of a region's number of tourism jobs relative to the number of tourism jobs at the national level.
Tourism Employment Diversity	LQ of tourism jobs	Tourism HR	Nov 2023	This indicator measures a region's share of jobs in the tourism industry relative to the number of jobs at the national level.
	Share of female employment in tourism	Tourism HR	Nov 2023	This indicator measures the share of female workers employed in the tourism industry.
	Share of immigrants employed in tourism	Tourism HR	Nov 2023	This indicator measures the share of immigrant workers employed in the tourism industry.
Tourism Employment Development	Percentage of university/college-educated workforce	Tourism HR	2021	This indicator measures the share of tourism workers who have a university certificate, degree or diploma.
	Tourism GDP per job	Statistics Canada	2019	This indicator measures the ratio of GDP generated by tourism industries to the total number of tourism workers.
	Enrollment rate in post-secondary tourism and hospitality programs	Tourism HR	2020	This indicator measures the share of people enrolled in post secondary hospital programs such as parks, recreation and leisure programs, hospitality administration/management as well as culinary arts programs.

Glossary

Employment continued

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Tourism Industry Attractiveness	Perception of tourism as a career	Tourism HR	2022	This measures the extent to which residents view working in the tourism industry as an excellent career opportunity.
	Tourism jobs average wage difference	Statistics Canada - Provincial and Territorial Gross Domestic Product by Income and by Expenditure Accounts & Labour Force Survey	2019	This indicator measures the difference in average hourly wages between all workers and tourism workers in an economy.

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Enablement

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Business Ecosystem	Number of f large-scale enterprises	Statistics Canada - Survey of Employment, Payrolls and Hours	2022	This indicator measures the number of businesses with more than 500 employees.
	Number of universities	QS Rankings	2024	This indicator measures the number of globally ranked universities that exist in a specific region.
	Number of international conferences	National Business Events Pace Report	Q2 2023	This indicator measures the number of international business events held.
Digital Readiness	Share of online orders received and purchases made for goods and services in the tourism industry	Statistics Canada - Survey of Digital Technology and Internet Use	2021	This indicator measures the share of online sales made by tourism businesses.
	Internet network access	Statistics Canada - Canadian Internet Use Survey	2022	This indicator measures the percentage of residents that have access to the internet at home.
	Mobile network access	CRTC	2021	This indicator measures the percentage of the population that is covered by at least one LTE wireless network.
International Openness	Number of immigrants	Statistics Canada - Quarterly Demographic Estimates	Q3 2023	This indicator measures the number of immigrants (permanent residents and landed immigrants) in a specific region.
	Number of international visitors	Statistics Canada - Frontier Counts	2023	This indicator measures the number of non-resident visitors in a specific region, over a period of time.
	Number of international students	Statistics Canada - Postsecondary Student Information System	2022	This indicator measures the number of international students enrolled in all post-secondary institutions in a specific region, over a period of time.
	Open country score	Passport Index	2024	This indicator measures the number of passports a country accepts visa-free or with visa on arrival.
Quality of Life	Crime rate	Statistics Canada - Uniform Crime Reporting Survey	2022	This indicator measures the volume and the seriousness of crime in a region. The index is calculated with weights assigned to each offense that are derived from average sentences handed down by criminal courts. The more serious the average sentence, the higher the weight for that offense. As a result, more serious offenses have a greater impact on changes in the index. All criminal code offenses are included in this index.
	Average greenness	Statistics Canada - Canadian System of Environmental-Economic Accounting - Ecosystem Accounting	2023	This indicator measures the percentage of land area that is classed as green (normalized difference vegetation index (NDVI) pixel >= 0.5) within the geography.
	Number of hospital beds per capita	CIHI	2022	This indicator measures the number of hospital beds per 100,000 of a population in a specific region.

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Enablement continued

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Quality of Life	Wastewater treatment capacity	Statistics Canada - Municipal Wastewater Systems in Canada (MWSC)	2020	This indicator measures the volume of wastewater discharged from municipal sewage systems that is treated at the primary, secondary and tertiary level.
	Housing affordability	Statistics Canada - Municipal Wastewater Systems in Canada (MWSC)	2022	This indicator measures the proportion of monthly income spent on rent by tourism workers in a region.
	Number of resolved long-term drinking water advisories on public systems on reserves	Indigenous Services Canada	2022	This indicator measures the number of resolved drinking water advisories. An advisory is issues on water systems in First Nations communities that have been deemed on unsafe for more than a year as recorded by Indigenous Services Canada. The decision to lift a long-term drinking water advisory lies with a community's chief and council, based on recommendations from environmental public health officers. This is in line with the Government of Canada's goal of ending all long-term drinking water advisories on public water systems on reserve and providing safe, clean drinking water in First Nations communities.
Tourism Service Infrastructure	Number of leisure experiences	TripAdvisor	2023	This indicator measures the total number of leisure activities rated by tourists on TripAdvisor (all experiences except shopping).
	Size of largest convention centre	Venue websites	2023	This indicator measures in square feet, the size of the largest convention center in a specific region, at a specific time.
	Number of meeting/event venues	Cvent	2023	This indicator measures the total number of venues available for meetings and events in a specific region, at a specific time.
	Spectator sports stadium capacity	Google Search	2023	This indicator measures the number of people who can be seated in the largest stadium in a region.
	Number of hotel rooms	STR	2023	This indicator measures the total number of hotel rooms in a specific region.
	Number of short-term rentals	AirDNA	2022	This indicator measures the total number of short-term rentals in a region as listed by AirDNA.
Tourism Transportation System	Air connectivity score	IATA; Intervistas	2023	This indicator measures the connectivity of airports in a region to airports outside the country, to airports in all provinces, and airports within the province.
	Railroad connectivity score	Esri Community Analyst	2016	This indicator measures rail connectivity and is calculated as the percentage of inhabitants within a 10-km radius of a passenger train station.
	Road connectivity score	Esri, Community Analyst	2022	This indicator measures the transportation connectivity of the rural population and is calculated as the proportion of the rural population living within two kilometres of an all-season road.
	Share of residents taking public transport to work	Esri, Business Analyst	2022	This indicator measures the share of residents that take public transport to work.

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Environment

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Environmental Impact	GHG Emissions from tourism industries	Statistics Canada	2020	This indicator measures, in kilotonnes, the level of greenhouse gas emissions emitted by tourism industries in a specific region from all tourism industries.
	GHG Emissions per visitor	Statistics Canada	2020	This indicator measures, in kilotonnes, the level of greenhouse gas emissions emitted by tourism industries in a specific region per visitor.
	Climate Risk Index	German Watch	2021	This indicator measures the extent to which countries have been affected by the impacts of weather-related loss events (storms, floods, heat waves etc.). The index ranks each country on a scale of 1 - 100 with 1 being the most affected and 100 being the least affected.
	Waste disposed per population	Statistics Canada, Waste Management Industry Survey: Government Sector	2020	This indicator measures, in tonnes per people, the amount of residential waste disposed per 1,000 residents living in an area.
Natural Assets	Number of National Parks, Provincial Parks, UNESCO Biospheres and Dark Sky Reserves	DCAP	2023	This indicator measures the number of national parks, provincial parks, UNESCO biospheres, and dark sky reserves there are in a region.
	Number of terrestrial and freshwater ecoregions	One Earth, Freshwater Ecoregions	2022	This indicator measures the total number of terrestrial and freshwater ecoregions in a specific region.
	Number of UNESCO Natural World Heritage Sites	UNESCO	2022	This indicator measures the total number of World Heritage natural sites as published by UNESCO.
Tourism Sustainability	Investment in green energy and infrastructure	Infrastructure Canada	2022	This indicator measures the total investment in green energy and infrastructure projects across Canada.
	Share of renewable energy sources	Statistics Canada	2023	This indicator measures the share of energy generated from hydraulic turbines, tidal power turbines, wind power turbines and solar energy.
	Indigenous perspective on communal respect for the natural world	Canadian Barometer for Reconciliation	2023	This indicator measures how confident indigenous communities feel about the current efforts to keep the natural healthy.

Glossary

Environment continued

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Tourism Sustainability	Number of environmental treaty ratifications	World Economic Forum, Travel & Tourism Development Index	2022	This indicator measures the total number of international treaties from a set of 29 for which a region is a participant, as identified by the World Economic Forum. The treaties included are: the International Convention for the Regulation of Whaling, 1946 Washington DC; the Convention on Wetlands of International Importance especially as Waterfowl Habitat, 1971 Ramsar; the Convention Concerning the Protection of the World Cultural and Natural Heritage, 1972 Paris; the Convention on the Prevention of Marine Pollution by Dumping of Wastes and Other Matter, 1972 London, Mexico City, Moscow, Washington; the Convention on International Trade in Endangered Species of Wild Fauna and Flora, 1973 Washington, DC; the International Convention for the Prevention of Pollution from Ships (MARPOL) as modified by the Protocol of 1978, London; the Convention on the Conservation of Migratory Species of Wild Animals, 1979 Bonn; the United Nations Convention on the Law of the Sea, 1982 Montego Bay; the Convention on the Protection of the Ozone Layer, 1985 Vienna; the Protocol on Substances that Deplete the Ozone Layer, 1987 Montreal; the Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal, 1989 Basel; the International Convention on Oil Pollution Preparedness, Response and Co-operation, 1990 London; the United Nations Framework Convention on Climate Change, 1992 New York; the Convention on Biological Diversity, 1992 Rio de Janeiro; the International Convention to Combat Desertification in Those Countries Experiencing Serious Drought and/or Desertification, Particularly Africa, 1994 Paris; the Agreement Relating to the Implementation of Part XI of the United Nations Convention on the Law of the Sea of 10 December 1982, 1994 New York; the Agreement Relating to the Provisions of the United Nations Convention on the Law of the Sea Relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks, 1995 New York; the Kyoto Protocol to the United Nations Framework Convention on the Climate Change, 1997 Kyoto; the Convention on the Law of the Non-Navigational Uses of International Watercourses, 1997 New York; the Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade, 1998 Rotterdam; the Cartagena Protocol of Biosafety to the Convention on Biological Diversity, 2000 Montreal; the Protocol on Preparedness, Response and Co-operation to Pollution Incidents by Hazardous and Noxious Substances, 2000 London; the Stockholm Convention on Persistent Organic Pollutants, 2001 Stockholm; the International Treaty on Plant Genetic Resources for Food and Agriculture, 2001 Rome; the International Tropical Timber Agreement, 2006 Geneva; the Supplementary Protocol on Liability and Redress to the Cartagena Protocol on Biosafety, 2010 Nagoya – Kuala Lumpur; the Protocol on Access to Genetic Resources and their Fair and Equitable Sharing of Benefits Arising from their Utilization to the Convention on Biological Diversity, 2010 Nagoya; the Convention on Mercury, 2013 Minamata; and the Paris Agreement 2015.

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Engagement

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Community Openness	Share of Canadians who recognize tourism's contribution to quality of life	Rove RSI, Social License Monitor	2022	This indicator measures the share of Canadians who recognize that tourism positively impacts their quality of life.
	Share of Canadians who recognize tourism's contribution to the economy	Rove RSI, Social License Monitor	2022	This indicator measures the share of Canadians who recognize that tourism is good for their community.
	Visitors per population	Statistics Canada	2023	This indicator measures the ratio of visitors to 1,000 of the resident population in a region.
	Visitors per sqkm	Statistics Canada	2023	This indicator measures the number of visitors per square kilometer of land area in a region.
	Non-Indigenous community engagement with Indigenous causes and communities	Canadian Barometer for Reconciliation	2023	This indicator measures how interested non-indigenous group are in indigenous causes and communities.
	Indigenous perspective on mutually respectful relationships	Canadian Barometer for Reconciliation	2023	This indicator measures how respected indigenous people in Canada in their relationships with non-indigenous communities.
Cultural Representation	Language diversity	Statistics Canada	2021	This indicator measures the proportion of a region's population that speaks at least two languages at home.
	Diversity index	Statistics Canada	2021	This indicator measures the level of variety across ethno-cultural backgrounds in a specific region, at a given time. The index ranges from 0 (no diversity) to 100 (complete and even diversity).
	Knowledge of French/English	Statistics Canada	2021	This indicator measures the share of the population that speaks at least one of the two official languages in Canada - English or French.
	Indigenous perspective on community welfare	Canadian Barometer for Reconciliation	2023	This indicator measures how well indigenous individuals, communities, and cultures in Canada are doing.
Cultural Resources	Number of oral and intangible cultural expressions	UNESCO	2023	This indicator measures the total number of intangible cultural expressions in a specific region as published by UNESCO.
	Number of UNESCO Creative Cities	UNESCO	2023	This indicator measures the total number of creative sites in a specific region as published by UNESCO.
	Number of UNESCO Cultural World Heritage Sites	UNESCO	2023	This indicator measures the total number of World Heritage cultural sites as published by UNESCO.

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Engagement

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Cultural Vibrancy	Number of hospitality businesses	Statistics Canada	2023	This indicator measures the total number of food service and accommodation businesses in a specific region.
	Financial support for cultural tourism initiatives/arts and culture funding	Canadian Heritage	2022	This indicator measures a region's total spending on cultural, tourism, sports and diversity programs.
	Number of cultural tourism experiences	TripAdvisor	2023	This indicator measures the total number of cultural experiences - landmarks, museums, theatres and concerts available in a region, as listed on TripAdvisor.
	Number of indigenous experiences	Destination Indigenous	2022	This indicator measures the total number of Indigenous experiences in a region.

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Experience

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Cost of Travel	Ticket taxes and airport charges	IATA, SRS Analyser	-	This indicator measures, on average, the total air travel fees/additional charges travellers pay when flying into a destination.
	Hotel price index	Statistics Canada	2023	This indicator measures the price change for short-term accommodation services with reference to a base year of 2013. These services comprise the provision of rooms for an overnight or short stay without any meals or other services (i.e. parking, Internet, etc.). The index reflects changes in room rates excluding all taxes, and covers hotel and motel lodging services.
	Purchasing Power Parity	The World Bank, World Development Indicators	2021	Purchasing power parity (PPP) conversion factor is a spatial price deflator and currency converter that controls for price level differences between countries, thereby allowing volume comparisons of gross domestic product (GDP) and its expenditure components.
Place Brand	Destination Index	Destination Canada, GTRP; YouGov	Q3 2023	This indicator measures the overall destination brand health based on the average impression, quality, value, reputation, satisfaction & recommendation.
	Country Brand Strategy rating	Bloom Consulting	2021	This, according to the World Economic Forum, evaluates the accuracy of a National Tourism Organization's (NTO) Country Brand Strategy. It measures the country's branding accuracy by means of a formula that compares the most popular brand tags for a specific country to the brand tags most heavily promoted by that country's NTO. A country receives a higher rating if the respective NTO focuses its promotion on the most strategic tourism-related brand tags with the highest demand. A poor rating can suggest either the inappropriate promotion of the least popular brand tags (as measured by online search volume) by an NTO or the lack of focus on the brand tags in highest demand.
Tourism Products	Share of quality experiences	TripAdvisor	2023	This indicator measures the number of quality tourism experiences in a region, posted on TripAdvisor and rated 4 stars and above.
	Share of quality hotels	TripAdvisor	2023	This indicator measures the number of quality hotels in a region, posted on TripAdvisor and rated 4 stars and above.
	Share of tourism businesses providing universal access	Statistics Canada, Canada's Core Public Infrastructure Survey	2020	This indicator measures the share of publicly owned culture, recreation and sports facilities that provide accessible infrastructure for their clients.
	Hotel rooms per visitor	STR	2022	This indicator measures the number of hotel rooms available per visitor in a region.
	Experiences per visitor	TripAdvisor	2023	This indicator measures the total number of tourism experiences available per 1,000 overnight visitors in a region.

Glossary

Experience continued

CATEGORY	INDICATOR	SOURCE	YEAR	DEFINITION
Travel Demand	Geographically dispersed tourism	Destination Canada, LASR	2023	This indicator measures the share of relative spending between the top tourism region and the total spending in the overall geographic area.
	Demand search for Canada, and destinations	Google	2022	This indicator measures the trend in each destinations online popularity as measured by Google.
	Earned media coverage of Canada travel	Destination Canada; Agility PR	2023	This indicator measures the volume and reach of unpaid media exposure that Canada as a travel destination receives. It includes mentions in news articles, blogs, social media posts, travel reviews, and other forms of media where content about Canada is generated organically by third parties, without direct payment or sponsorship by tourism agencies.
	Earned media coverage of Indigenous experiences	Destination Canada; Agility PR	2023	This indicator measures the volume and reach of unpaid media exposure that Indigenous tourism in Canada receives. It includes mentions in news articles, blogs, social media posts, travel reviews, and other forms of media where content about Indigenous tourism experiences is generated organically by third parties, without direct payment or sponsorship by tourism agencies.
	Number of Google travel searches by destination	Google	2023	This indicator measures the total number of Google searches for each travel destination.
	Length of stay	Statistics Canada, Visitor Travel Survey (VTS)	2019	This indicator measures, on average the number of days spent per trip to a destination.
Visitor Experience	High-Values Guests spending	Destination Canada, GTRP; YouGov	2021	This indicator measures the mean annual household spending on vacation trips of High-Value Guests.
	Share of High-Values Guests returning to Canada	Destination Canada, GTRP; YouGov	2023	This indicator measures the likelihood of High Value(s) Guests who previously visited Canada to consider Canada as a place to visit next.

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