Choosing a New North Star

A Balanced Strategy for Canada’s Visitor Economy
One Year into the Global Pandemic
Navigating uncharted waters

Survive

Revive

Thrive
2020 losses to Canada’s tourism sector are the worst on record.

Quarterly Economic Evolution of Tourism in Canada
1986-2020 Q4

Source: Statistics Canada, National Tourism Indicators, 2020 Q4

Vancouver Expo 1986
Calgary 1988 Winter Olympics
World Trade Organization (WTO) and NAFTA Agreements
USA’s Western Hemisphere Travel Initiative (WHTI) Border Measures
9/11 Terrorism Events
SARS Outbreak
Global Economic Crisis
Vancouver-Whistler 2010 Winter Olympics
COVID-19 GLOBAL PANDEMIC

Index Year 1986=100, based on 2012 seasonally adjusted data
Impact on tourism exceeds that of other businesses

Tourism unemployment is almost double the national rate

Women, youth, new Canadians, and Indigenous workers are hardest hit

Source: Statistics Canada, Table 33-10-0270-01 Experimental estimates for business openings and closures for Canada, provinces and territories, census metropolitan areas, seasonally adjusted
Canadians understand the value of tourism...

84% of Canadians believe that the tourism sector is very/somewhat important to Canada’s economy.

Perceptions of Tourism in Canada

Strongly/somewhat agree

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Canadian visitors travelling domestically are good for Canada</td>
<td>82%</td>
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<tr>
<td>Visitors from other countries are good for Canada</td>
<td>79%</td>
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Source: Destination Canada 2020 Global Tourism Watch, November 2020
Base size: Canadian residents (n=9059)

Q: “In your opinion, how important is the tourism industry to Canada’s economy?”
Q: “To what extent do you agree or disagree with each of the following statements?”
Leading indicators are cautiously encouraging

- Canadians are searching for travel
- Vaccine rollout is underway
- Resident sentiment beginning to improve
Reviving market revenue will begin domestically

By keeping their tourism dollars in Canada, Canadians can play a critical role in:

- Bolstering business
- Creating jobs
- Supporting community
Full travel restrictions
Easing of intraprovincial travel restrictions
Easing of interprovincial travel restrictions
Easing of travel restrictions to/from Canada

PHASE 1 — Influence
Tourism Contribution to Canadians’ Quality of Life. Travel in Canada.

PHASE 2 – Inspire & Build Confidence
Where will you go first? Ready when you are (industry investments in hygiene).

PHASE 3 — Conversion – Early Adopters
Book Now

PHASE 4 — Conversion and P2P Advocacy
Explore Now. Share your Travel Experiences.

PHASE 5 – Conversion – Late Adopters
Now is the best time to see Canada.

2021

2022

Messaging evolution as restrictions ease
Showcase value of tourism
Earned media coverage

Canadians Key to Supporting the Recovery of Devastated Tourism Sector

NEWS PROVIDED BY
Destination Canada
Mar 06, 2021, 05:00 ET

One year into the global pandemic, Destination Canada research reveals impact of COVID-19 on Canada’s Visitor Economy and the role Canadians can play.

VANCOUVER, BC, March 8, 2021 /CNW/ - Today, Destination Canada released new research and analysis that uncovers the scope of the impact to the tourism sector from COVID-19. The visitor economy saw unprecedented losses in 2020 and tourism continues to be by far the most threatened sector in the Canadian economy due to its service nature and current reliance on foreign tourists.

While recovery is forecasted to take years, Canadians can play a critical role in bolstering the tourism economy, creating jobs and supporting local businesses by keeping their tourism dollars in Canada. However, search data reveals that Canadians are showing a high interest in international travel this year, if safe to do so.

1,700+ media clips
Encouraging Canadians to discover more of Canada
Inspire

Where will you go first?
Dreaming is one of the most important aspects of travel.
Where will you go first?

SOCIAL ENCOURAGEMENT

Engage with social community to have them share their bucket-list destinations.

Profile selections in a weekly Instagram spotlight to connect advocacy to inspiration.
Where will you go first?

PUBLIC AND MEDIA RELATIONS
New strategies to compete better internationally
NATIONAL TOURISM PARTNERSHIP
What will it take to thrive?
A New North Star

- Aspire to enhance quality of life of *Canadians* and enrich the lives of *visitors*.

- Together, we enable *Canadian culture to thrive* and placed-based *regenerative economies to emerge*. 
Tourism Ecosystem

NATIONAL PARTNERS
- Innovation, Science and Economic Development Canada
- National Sector Associations
- Indigenous Tourism Association of Canada
- Tourism Industry Association of Canada
- Government of Canada Departments

PROVINCIAL/TERRITORIAL PARTNERS
- Provincial Sector Associations
- Provincial/Territorial Ministries of Tourism, Arts, Culture and Sport
- Provincial/Territorial Marketing Organizations

LOCAL PARTNERS
- Local Business Associations
- Other Industries
- 200,000+ Tourism Businesses
- Destination Management Organizations Industries
- Local Governments

INDUSTRY
Supporting social, cultural, economic, and environmental benefits for all Canadians
Strategy

Enhance quality of life of Canadians. Enrich the lives of visitors.

Net Benefits
economic, socio-cultural, environmental
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