

Choosing a New North Star

A Balanced Strategy for Canada's Visitor Economy
One Year into the Global Pandemic





DESTINATION
CANADA

TIAC  AITC

Navigating uncharted waters

Survive

Revive

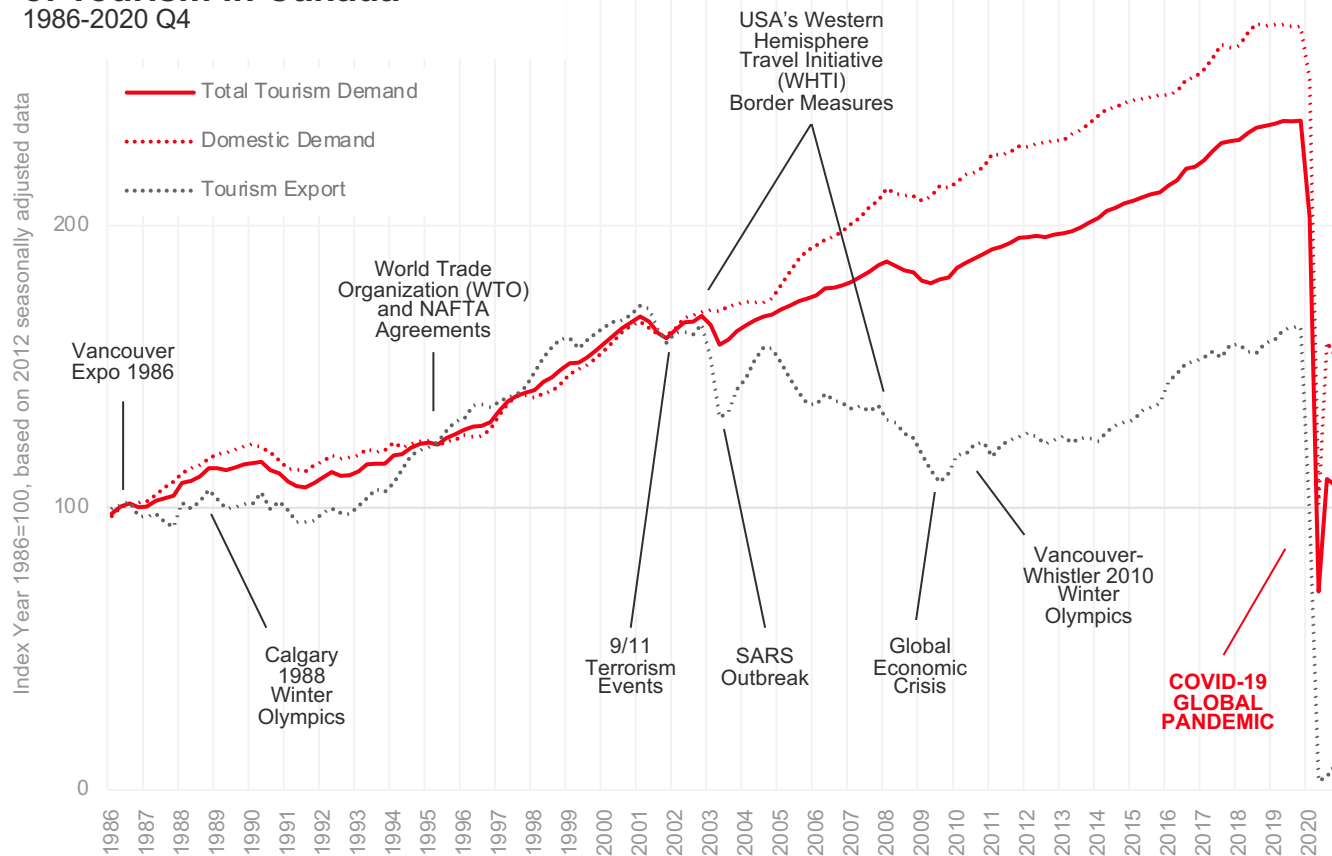
Thrive

Middle Cove
Beach
NL

CANADA

2020 losses
to Canada's
tourism
sector are
the worst
on record

Quarterly Economic Evolution of Tourism in Canada 1986-2020 Q4

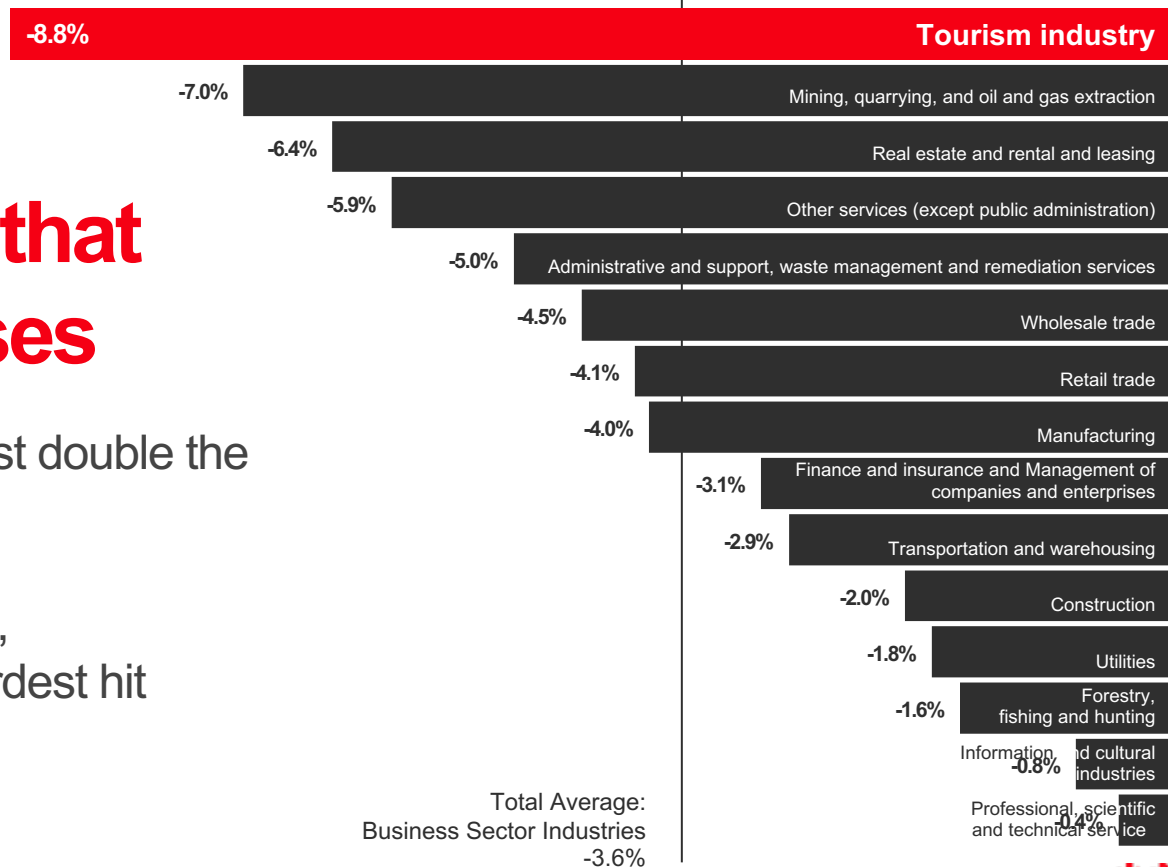


Impact on tourism exceeds that of other businesses

Tourism unemployment is almost double the
national rate

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

Active Businesses by Sector
% change from January 2020 to December 2020



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

82%

Canadian visitors
travelling domestically
are good for Canada

79%

Visitors from
other countries
are good for Canada

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



Messaging evolution as restrictions ease

2021

2022

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.

Full travel restrictions

Easing of intraprovincial travel restrictions

Easing of interprovincial travel restrictions

Easing of travel restrictions to/from Canada



Showcase value of tourism



explorecanada • Following
Kelowna, British Columbia

explorecanada • Get to know the people who keep our heart beating strong.

Meet David Paterson @tantaluswine in Kelowna, British Columbia (@tourism@hellobc) and follow along as we profile the communities who make our heart beat strong.

"I grew up and did my training in New Zealand. When I came back to my hometown, I was surprised by the love and support of the community I discovered in Kelowna. There is a strong sense of community here."



Liked by tourismcalgary

4 DAYS AGO

Add a comment...



explorecanada • Following
Charlevoix

explorecanada • Get to know the people who keep our country's heart beating strong.

Meet Marie-Eve Cournoyer and Judith St-Pierre of @lapecheestbelle in Charlevoix, Quebec (@charlevoixatr, @tourismequebec) and follow along as we profile the communities who make our heart glow (and the coast shine).

"When we are on the water, we talk about beauty all around us: nature, wildlife. When we are there is no pressure. We were surprised by how everywhere there is a strong sense of community."



Liked by gabi_carrozzini
3,396 others

4 HOURS AGO

Add a comment...

HEARTBEAT OF CANADA

Meet the glowing hearts in our communities



Earned media coverage

Canadians Key to Supporting the Recovery of Devastated Tourism Sector

NEWS PROVIDED BY
Destination Canada →
Mar 08, 2021, 05:00 ET

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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.

Revisiting Tourism: Canada's Visitor Economy One Year into the Global Pandemic

March 2021



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.



LET US KNOW WHAT'S ON
YOUR CANADIAN BUCKET LIST
AND IT COULD BE INCLUDED
IN A FUTURE POST!

**WHERE
WILL YOU
GO FIRST?**

We asked what's on your Canadian bucket list, here are some top picks. We can't wait to welcome you when restrictions ease.

Where will you go first?

Type something....

Where will you go first?

PUBLIC AND MEDIA RELATIONS



New strategies to compete better internationally

Toronto
ON

NATIONAL TOURISM PARTNERSHIP



DESTINATION
INDIGENOUS



INDIGENOUS
CANADA
AUTOCHTONE
CANADA

What will it take to thrive?



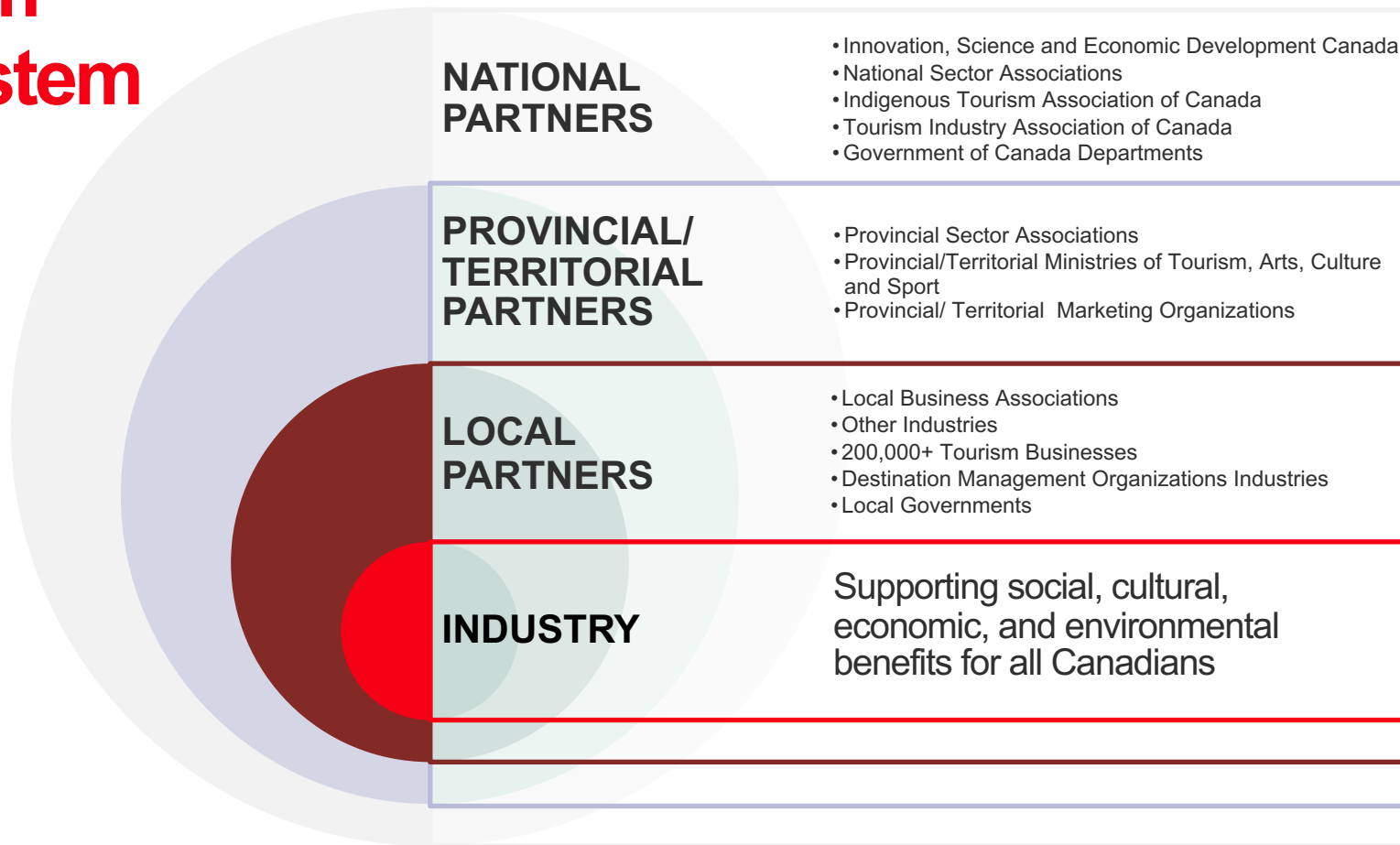
A New North Star

- 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**

Whitehorse
YK

CANADA

Tourism Ecosystem



Strategy

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

Brand Resonance

Legendary Experiences

Industry Vitality

Social License

Net Benefits

economic, socio-cultural, environmental



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@DestinationCAN (Corporate)

@ExploreCanada (Consumer)



Canada

CANADA 
**FOR
GLOWING
HEARTS**



can