



Government
of Canada

Gouvernement
du Canada



Canada's Federal **Tourism** Strategy: **Welcoming the World**

www.tourism.gc.ca

Canada 

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Ontario Ottawa



Foreword from the Prime Minister

Canada is a land of unparalleled beauty. Each year millions of visitors from around the world, and from across Canada, discover a treasure trove of natural and man-made wonders. They marvel at sights like Vancouver Island's rainforests, the majestic snow-capped Rocky Mountains, the great plains of the Prairies, the brilliant Northern Lights, the polar bears in Churchill, the vast waters of the Great Lakes, the spectacular Niagara Falls, the scenic Saguenay fjord, the magnificent Cabot Trail, and thousands of kilometres of spectacular Atlantic, Pacific and Arctic coastline.

The industry that serves the people who visit our country is an important part of our economy. Indeed, the tourism industry supports businesses and workers in every region of our country, and many thousands of Canadians rely on tourism for their jobs and livelihoods. After consulting with the men and women who help to make Canada such a great place to visit, it became clear that a new federal tourism strategy was needed to better coordinate our efforts in support of the tourism sector.

The result of our consultations is the Federal Tourism Strategy outlined in this document. It is our hope that the Strategy will help inspire the world to explore Canada while also making it easier to travel to our beautiful country. It will also encourage the development of exceptional tourism experiences and further enhance the best tourism workforce in the world. In short, we hope it will assist the many men and women who depend on tourism to build a better, more competitive industry in Canada.



A handwritten signature in blue ink, which appears to be 'Stephen Harper'.

Stephen Harper
Prime Minister of Canada

Northwest Territories Yellowknife



Message from the Minister of State

As Minister of State (Small Business and Tourism), it is my pleasure to introduce the Federal Tourism Strategy. As one of the greatest places in the world to live, work and invest, Canada is also one of the best places on the planet to travel. Our country has a lot to offer visitors, and through the Federal Tourism Strategy, our government is committed to growing tourism in Canada.

The Strategy is the result of significant collaboration among more than 15 federal departments and agencies. I'd like to thank my Cabinet colleagues and their departments for their help in developing it and for their support as we continue to work together on matters that impact the tourism sector.

Our priorities are firmly guided by what we have heard from members of the tourism sector across Canada. An open dialogue with business has defined the opportunities and challenges facing Canada's visitor economy. I'd like to thank the Tourism Industry Association of Canada in particular for its important contributions. The Strategy will build on this open and cooperative partnership with the tourism industry.

The Strategy signals a fundamental shift in how the federal government considers the issues and opportunities surrounding tourism. It puts into action a whole-of-government approach that applies a tourism lens to policy and program development and focuses future tourism investments on priority areas.

The time is right to launch this new approach. Federal actions supported the tourism industry through the economic downturn, and the sector continues to be resilient in the face of frequently volatile environments. We have the strongest tourism brand in the world. The Vancouver 2010 Olympic and Paralympic Winter Games demonstrated to the world the warm and welcoming spirit of Canadians and the great variety of world-class tourism experiences available from coast to coast. The 2011 Royal Tour by their Royal Highnesses, the Duke and Duchess of Cambridge, further heightened global exposure and interest in Canada.

As we build on this momentum, the Federal Tourism Strategy provides the scope and direction for our government to effectively maximize opportunities for Canada to welcome the world.



Maxime Bernier

Minister of State (Small Business and Tourism)



Saskatchewan Saskatoon





The Federal Tourism Strategy

A whole-of-government approach will enhance the federal government's role as an effective partner with industry and other levels of government in support of an internationally competitive tourism sector.

The Strategy focuses on four priorities:

- 1 Increasing awareness of Canada as a premier tourist destination.
- 2 Facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada's borders.
- 3 Encouraging product development and investments in Canadian tourism assets and products.
- 4 Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality.



1 Why a Federal Tourism Strategy?

New Brunswick Miscou Island

Why a Federal Tourism Strategy?

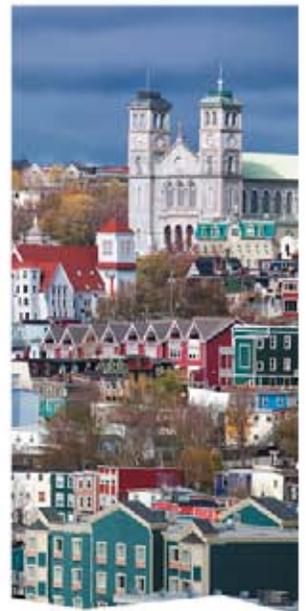
Canada offers the world vibrant cities on the edge of nature, unique adventures in awe-inspiring landscapes, fine wines within bountiful vineyards, culinary specialties under clear skies and a friendly, multicultural and open society. This provides us with an exceptional platform for strengthening an already robust visitor economy, which generates jobs and economic growth across Canada.

In 2010, tourism was responsible for \$73.4 billion in revenues and represented approximately 2 percent of Canada's overall gross domestic product (GDP). That's as much as the combined GDP of the agriculture, forestry and fishing sectors.

Approximately 594,500 jobs in Canada are directly generated by tourism in every province and region of the country. Moreover, the visitor economy drives key service industries, including accommodations, food and beverage, passenger transportation, recreation and entertainment, which account for over 9 percent of total employment in Canada. Many of these jobs are in the North, Aboriginal communities and rural areas.

International tourism is an important source of export revenues, having brought \$14.9 billion into the economy in 2010. That's comparable to the export sales figures for three key natural resources—aluminium, copper and coal—combined. Tourism also represents about 23 percent of Canada's international trade in services, making it Canada's second-largest service export behind commercial services.

In addition to important economic benefits, tourism allows Canadians to share our heritage with one another and with the world. It forges links, promotes understanding and encourages respect for the natural environment.

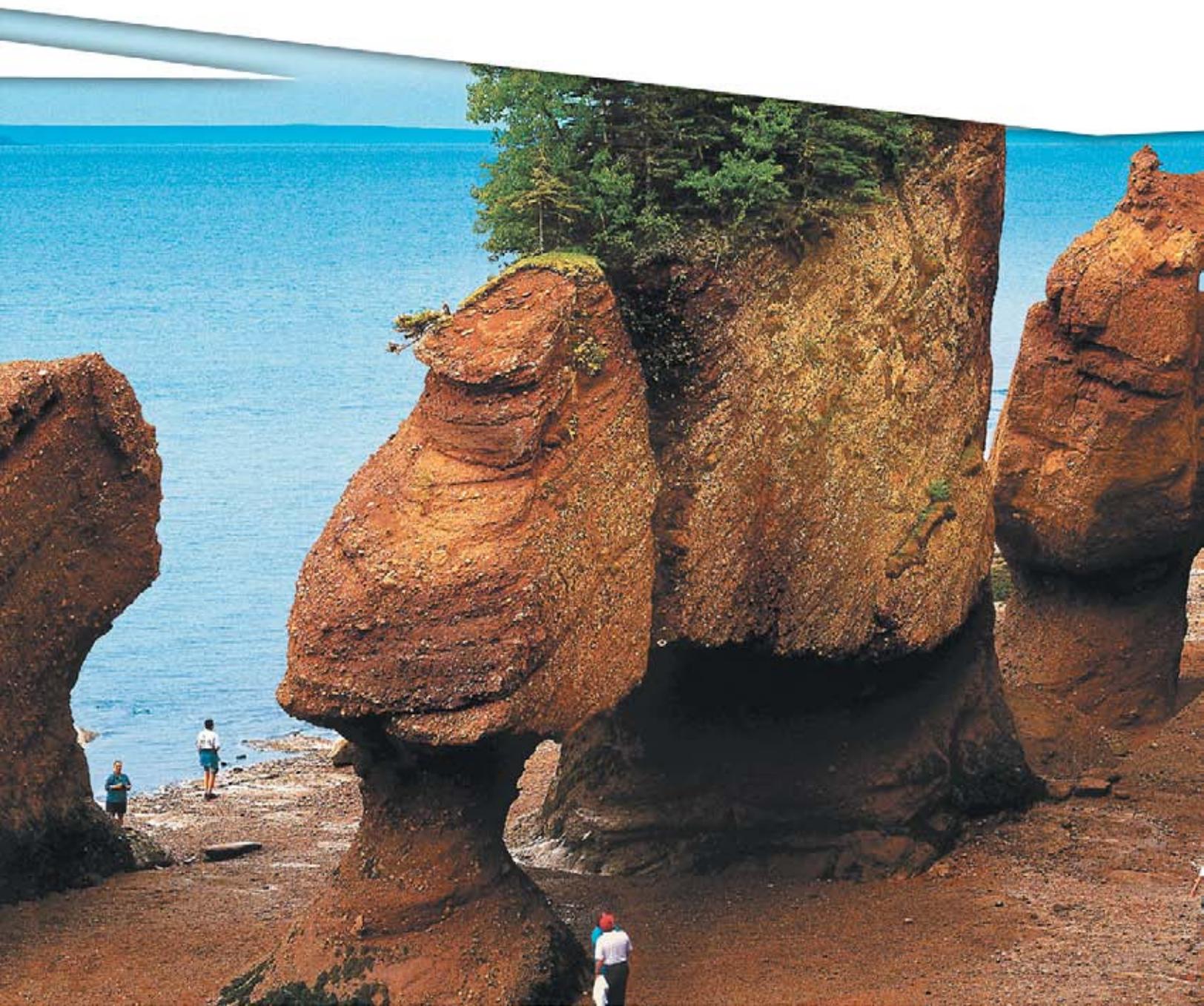


St. John's, NL

Who's who in Canadian tourism

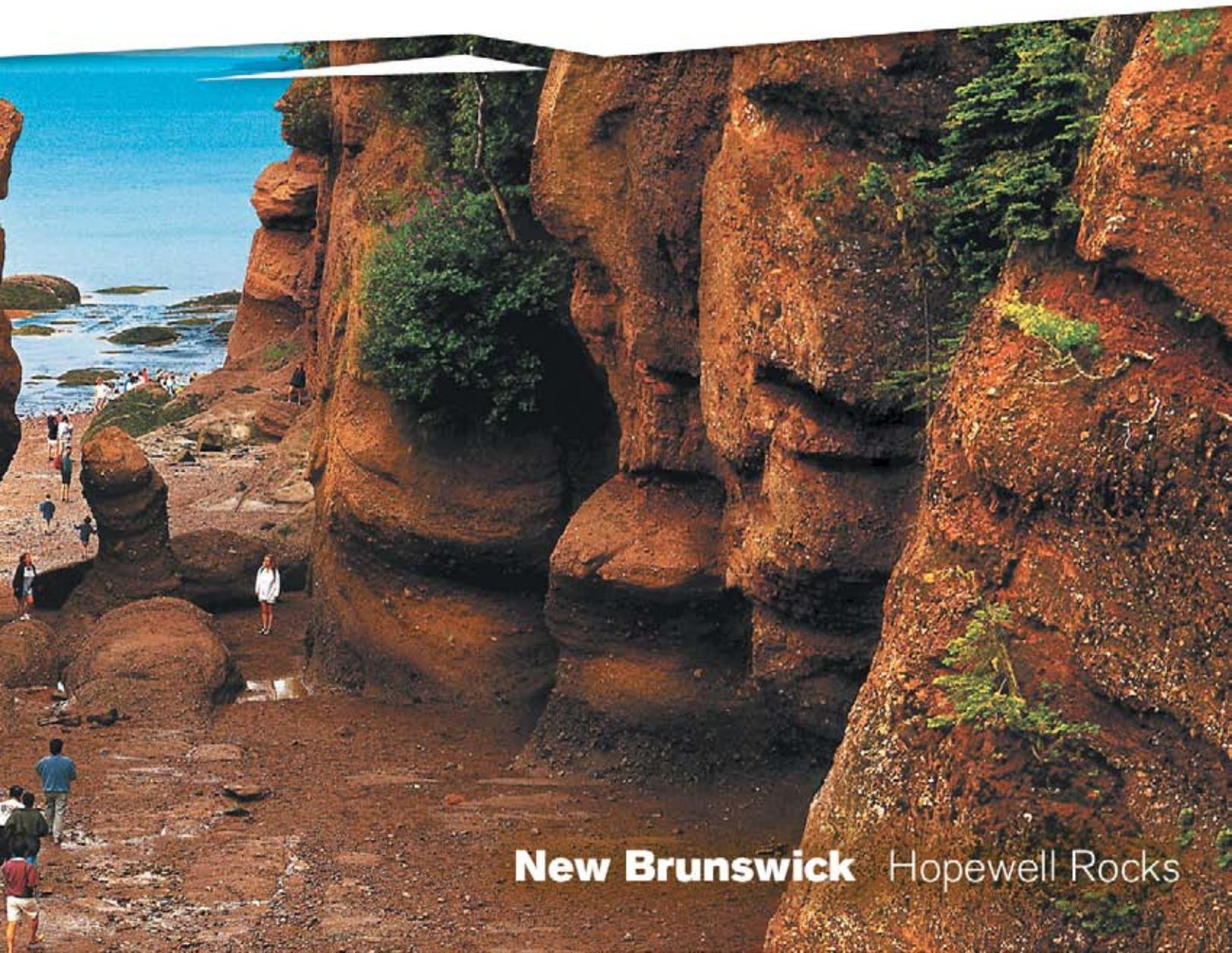
Small businesses are the backbone of the tourism industry. While large hotel chains, airlines and tour operators are important, about 98 percent of Canada's tourism sector consists of small and medium-sized businesses, such as lodges, wineries and spas. As such, it is mostly made up of thousands of private sector and not-for-profit organizations and associations, as well as departments and agencies at all three levels of government.

Tourism-related businesses often work with destination marketing organizations, which exist at the municipal, regional, provincial and national levels. These organizations promote development and market Canada's various tourism destinations and experiences.



The three levels of government, directly or through various agencies, run many of Canada's most important tourism attractions, including parks, museums, sports stadiums and convention centres. Governments also establish policy and legislative frameworks and administrative practices that support and affect how tourism businesses operate.

The diversified nature of the tourism sector makes it critical that all partners find ways to collaborate to build world-class destinations that offer first-class service and uniquely Canadian experiences.



New Brunswick Hopewell Rocks

Challenges and opportunities

The tourism industry is one of the most dynamic industries in the world.

Global growth

Over the last 20 years, international tourism arrivals have been growing consistently at an average of 4 percent per year. In the past, international tourism was seen as the purview of a relatively limited set of affluent travellers, whereas today the number of travellers is growing rapidly and many are originating from the expanding middle class of large emerging economies. Globally, strong economic growth has generated millions of new travellers looking to purchase exceptional tourism experiences, and this trend is expected to continue. The United Nations World Tourism Organization

forecasts that the number of international tourist visits will nearly double from 880 million in 2009 to 1.6 billion by 2020. Of the top five global source markets in 2010, China had the strongest growth—a 25.6-percent increase in international tourism spending in that year alone. The economies of Russia, Brazil and India are also generating large increases in the number of tourists.

Where they're travelling

In decades past, the majority of tourists preferred to visit a handful of developed countries, including Canada. In the 1950s, the top 15 destinations in the world for tourism received 97 percent of international tourist arrivals. By 2010, the top 15 destinations received only 55 percent of arrivals. In 1950, Canada was in second place behind the U.S. in terms of arrivals; by 2010, it had dropped to 15th place. In this Canada is not alone: Other mature markets are facing a similar challenge from new destinations. Tourism is growing in countries such as India, China, Turkey and Thailand, each of which had a much smaller tourism sector several decades ago. These exotic destinations are offering travellers newly accessible and unique experiences.

What travellers want

Technology has shifted marketplace power to the buyer. Travellers are increasingly using the Internet and social media tools to learn about new attractions around the world and to find the least expensive way to reach these destinations. Consumer expectations of value for money are becoming more demanding, and travellers are seeking novel experiences that satisfy their curiosity. There is also growing interest in sustainable tourism, which takes the environmental and cultural impact of travel into account. As tourism demand grows and evolves, there will be even more intense competition for tourism dollars among destinations. New destinations entering the market are crowding out the established tourism products that mature destinations have traditionally offered. Canadian tourism businesses must continuously invest and innovate if they want to be top-of-mind in this ever-changing marketplace.

On June 24, 2010, Prime Minister Harper and Hu Jintao, President of the People's Republic of China, witnessed the signing of a Memorandum of Understanding to Facilitate Outbound Tourist Group Travel from China to Canada. This **Approved Destination Status** is a tremendous boost for our tourism industry and has the potential to grow our visitor economy as we open up one of the world's fastest-growing outbound tourism markets. According to a Conference Board of Canada survey, the yearly number of travellers from China to Canada is expected to grow by up to 50 percent by 2015.



Canada's competitive position

Canada's tourism revenues have been growing for many years. Nevertheless, from 2000 to 2010, Canada's share of total international arrivals decreased from 2.9 percent to 1.7 percent and its share of total international revenues fell from 2.3 percent to 1.7 percent. As with many other nations with strong economies, Canada has a tourism deficit: Canadians spend more abroad than international visitors spend here.

Who's travelling here

Canada's tourism industry relies heavily on Canadians and Americans, although visitors originate from all over the world, including major markets such as the U.K., France, Germany, Japan and Australia. While volumes from these overseas markets are high, growth has been largely stagnant. There has also been an important decline in U.S. travel to Canada in the past decade. Factors that contributed to this decline include the shocks of 9/11 and the SARS epidemic, a strong Canadian dollar, the recent recession and an increasing desire by Americans to experience more exotic destinations, which are now easier to reach. As a result, the industry in Canada has become increasingly reliant on domestic rather than international travellers. In 2010, Canadians accounted for 80 percent of total tourism spending in Canada. At the same time, however, we are experiencing impressive double-digit growth in tourism from emerging markets such as India, Brazil and China. While volumes to date are modest, the trends indicate that these travellers will continue to become increasingly important to our tourism economy.

Recent trends

In 2009, the recession-driven decrease in global demand was challenging for Canadian businesses that rely on tourism, as it was for other sectors of the economy. However, in 2010, as Canada benefited from improved confidence and global economic conditions and its hosting of the Vancouver 2010 Olympic and Paralympic Winter Games, international overnight travel to Canada increased, reaching an estimated 16.1 million arrivals for a gain of 2.3 percent over 2009. This recovery was broadly based, with arrivals from virtually all key source markets, including the U.S., registering gains and with notable double-digit growth coming from Brazil, China, India and Japan.

Implications for the future

The increase in international arrivals this past year is encouraging. More broadly, forecasted growth in the number of tourists around the world presents a tremendous opportunity for Canada's tourism industry over the long term. However, we will face stiff competition within a dynamic and challenging global market. To be successful, Canada must better position itself to capitalize on the opportunities that lie in attracting more international visitors from more source markets while reinforcing domestic demand.



What we've heard

A wide range of individuals, organizations and other levels of government have been consulted in the development of the Strategy. The industry has expressed support for the four priority areas and recent federal actions to foster tourism, including investments in tourism infrastructure and marketing through Canada's Economic Action Plan and the signing of an Approved Destination Status agreement with China. The industry has also identified specific policy concerns with respect to the federal departments and agencies that shape the environment in which tourism business is conducted.

More broadly, the federal government is being asked for more consistency and support when making decisions that affect tourism and for the industry to play a greater part in the decision-making process. The industry wants to ensure that programs affecting tourism work efficiently together and that federal departments and agencies see the development of the tourism industry as a priority.



Northwest Territories Blachford Lake

Hayley Wickenheiser,
Olympic Gold Medallist,
Women's Ice Hockey



Alexandre Bilodeau,
Olympic Gold Medallist,
Men's Moguls

Working with our partners

Federal, provincial and territorial tourism ministers periodically convene to share ideas and suggest strategies on how to continue supporting our tourism industry. In 2009, the tourism ministers agreed to work toward a national tourism revenue target of \$100 billion by 2015. The Federal Tourism Strategy will inspire and guide federal policies and actions over the next four years to help meet that goal.

Some governments have introduced strategies to direct and coordinate actions by various ministries and agencies according to shared goals and proposed outcomes. Some have made tourism a departmental priority, and some have consulted widely to elevate tourism opportunities. All of these elements are part of our approach.

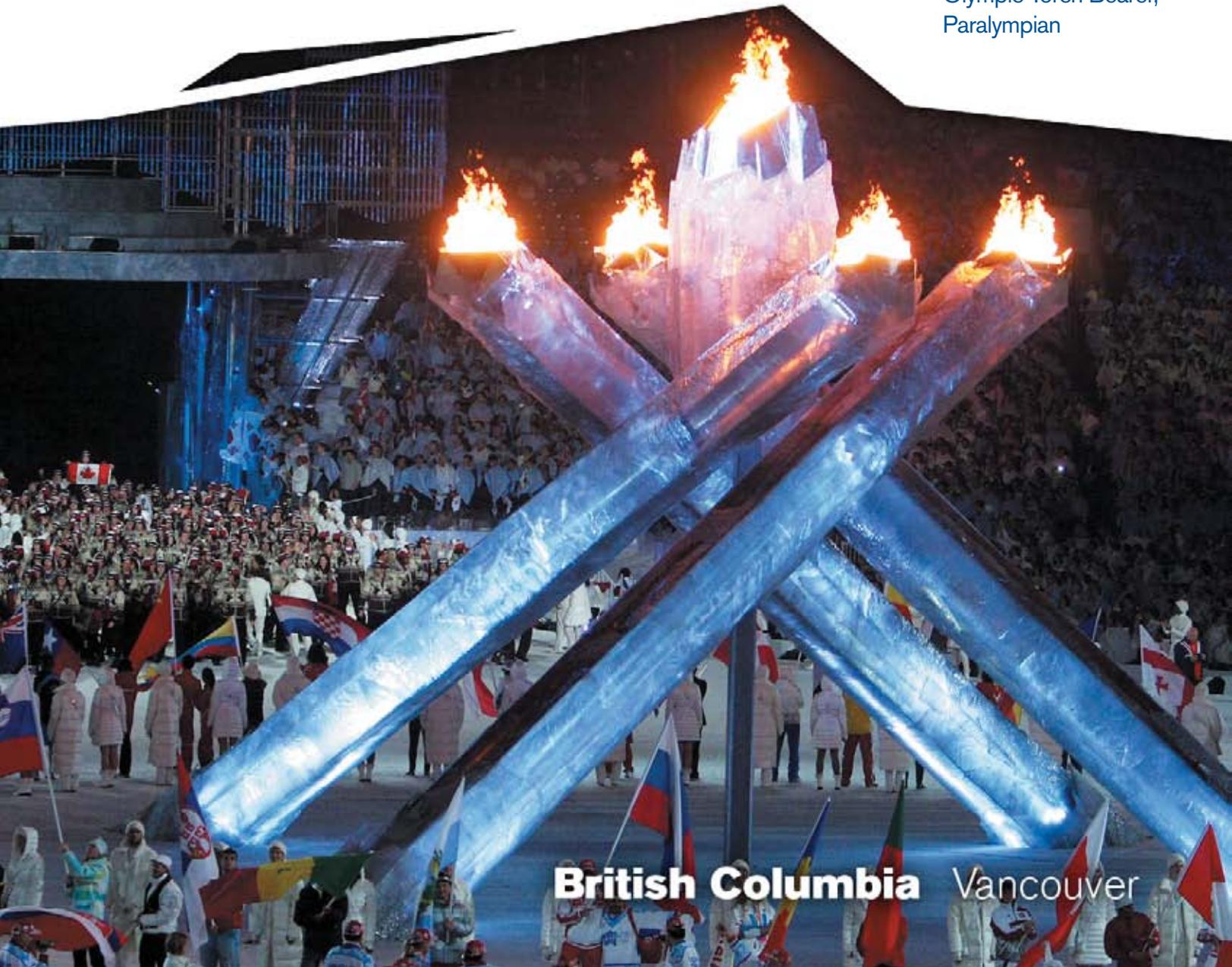
By working together, governments and the tourism industry can build on Canada's natural strengths. The industry needs to do what it does best—leading the way and innovating in the pursuit of new opportunities. Together, public and private sector partners can boost industry performance, thereby enhancing Canada's competitive advantage as a leading international destination.



The Vancouver 2010 Olympic and Paralympic Winter Games is a shining example. All levels of government, including a number of federal departments, worked with the industry and with the Vancouver 2010 Organizing Committee to plan and deliver the hugely successful Games, showing that real partnerships can produce real results.



Rick Hansen,
Vancouver 2010
Olympic Torch Bearer,
Paralympian



British Columbia Vancouver



Mr. Akshay Kumar and the Right Honourable Stephen Harper, Prime Minister of Canada

What we need to do

Awareness of Canada

To compete in a world in which consumers are bombarded with commercials—and given the country's relative size—Canada needs to continue its clear branding strategy and innovative marketing to increase awareness of Canada as a premier tourism destination. We must maintain a disciplined focus on key global markets and segments within these markets, based on well-founded research.

The Vancouver 2010 Olympic and Paralympic Winter Games highlighted Canada to the world as a strong, beautiful, vibrant and diverse nation. Canadians were praised for their exceptional hospitality and unflinching courtesy and for welcoming the world in a uniquely Canadian way. This exposure has strengthened Canada's tourism brand—*Canada. Keep Exploring.*—and has opened up Canada to new opportunities.

Still, the global marketplace remains crowded with compelling travel brands. A strong, recognizable national brand is increasingly important the further one gets from Canada, whereas provincial or city brands are more relevant in local markets in Canada and the U.S.



Access and movement of travellers

To ensure that travellers feel welcome in Canada, we must better facilitate ease of access and movement, while ensuring the safety and integrity of our borders.

Tourism relies on the easy movement of travellers, but Canada is a vast country with a small population. These two fundamental facts underlie some of Canada's transportation-related tourism challenges. They also highlight the importance of aviation to the visitor economy: 83 percent of non-U.S. visitors arrive by air, and tourism accounts for 95 percent of the revenues in the Canadian air passenger transportation industry.

Competition among air carriers is strong on major routes into and within Canada. Canadian air carriers have had to cope with volatile energy prices and with fluctuations in demand associated with the recession and recovery.

We have the good fortune to be a highly secure destination to visit, thanks in part to the protections in place at multiple ports of entry. The national interest in safe borders, however, can create obstacles for inbound, outbound and transiting visitors with regard, for example, to visas and border inspections. While managing security is paramount, we must continue to facilitate the flow of people, goods and services.



Product development and investment

To remain competitive internationally, we must encourage product development and investment in Canadian tourism assets and products.

Canada's products must keep pace with changing tastes and global competition. Competitor destinations are investing in memorable new attractions and so must we. Long-term, focused investments and innovation will allow us to capitalize on the full extent of Canada's inherent advantages. This will lead to the high-quality, unique and enriching experiences today's travellers seek.

We have product niches with strong growth potential. Research shows tremendous international interest in authentic experiences, whether in large or small cities, focused on Aboriginal culture, in Canada's North, or based on food, wine or sports. Capitalizing on this interest by developing and promoting exceptional experiences supports both business competitiveness and economic diversification.

Skills and labour

To enhance visitor experiences, we must foster an adequate supply of skills and labour that can deliver quality service and exemplary hospitality.

The tourism industry relies on personal contact. Every personal interaction—whether at an airport, restaurant, hotel, museum, park or show—has an impact on the visitor's experience. A culture of service and hospitality is crucial to the competitiveness of the sector.

The Conference Board of Canada forecasts that the tourism sector could face a shortage of more than 64,000 workers by 2015. This may limit the tourism industry's ability to realize its full potential.

Traditionally, the tourism sector has relied heavily on younger workers. Many young people have found their first jobs in this industry and have learned about key workplace competencies such as teamwork, customer service and taking responsibility. However, the size of the younger segment of the labour force is decreasing, and competition for it is intensifying.

The sector's business cycles are seasonal, with daily and weekly fluctuations in demand. These factors mean that the industry relies on part-time, seasonal and casual workers. Consequently, many tourism-related businesses have difficulty finding and keeping employees. The image of some tourism-related jobs as temporary placements can overshadow the competitive compensation and opportunities that come with the some 400,000 professional, supervisory and management positions across industries included in the sector.

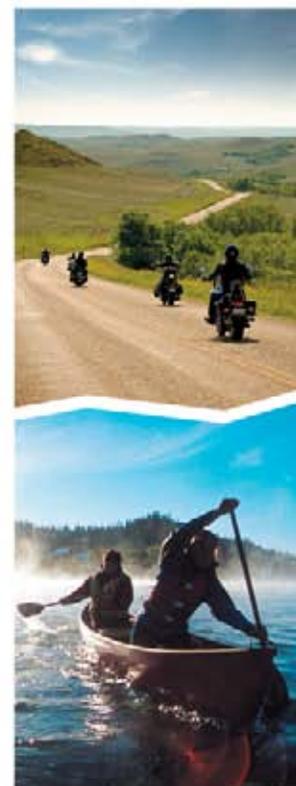
Solutions to labour market challenges must come from all partners in the sector. Individual businesses, the industry as a whole, provincial governments and the federal government all have tools that must be used to address this challenge.

Capitalize on our strengths

In an increasingly competitive global environment, it is no surprise that mature markets are taking action to stay on top. In the U.S., the *Travel Promotion Act* has created the Corporation for Travel Promotion, an organization that will work with the government to develop the first-ever program to market the U.S. as a destination.

Other countries, such as Australia, New Zealand, Turkey and Ireland, have put in place long-term tourism strategies that go well beyond marketing and promotion and include whole-of-government approaches. These approaches recognize that the global tourism marketplace is extremely dynamic and that all destinations need to be innovative, agile and collaborative to thrive. These strategies are often supported by significant financial investments in key tourism infrastructure, in events and activities, and in marketing. Global competition for business meetings, conventions and incentive travel is also continuing to rise. This high-yield and fairly stable business from international markets is worth an estimated \$2.3 billion in Canada and is particularly important to major cities.

There is a tremendous opportunity for major growth in the Canadian tourism industry, based on the projected increase in global travel. Canada has much to offer new travellers from large emerging economies as well as high-yield, long-haul travellers. We have a strong foundation of natural and cultural tourism assets on which to build new world-class tourism experiences. We have safe travel infrastructure, an internationally recognized tourism brand, a well-educated workforce and some of the world's most distinctive experiences. Realizing the full potential of Canada's tourism sector will require us to work hard and work together. Through the Federal Tourism Strategy, we will be more coordinated and responsive in the areas of greatest importance.



Saskatchewan

Yukon

2 How We Support Tourism



Ontario Ottawa

How We Support Tourism

Significant federal investments and support for the industry in recent years underline the importance of tourism to Canada's economy. This support includes funding programs that support tourism businesses, the direct control and operation of iconic tourism attractions, and programs to market Canada as a destination.

In 2008–09, we invested more than \$530 million in direct support for the tourism sector. This included more than \$360 million in product development and tourism infrastructure, such as convention centres, and \$113 million in tourism marketing. An additional \$782 million was spent largely on artistic, cultural and sports-related activities that have an indirect impact on tourism. We also made significant infrastructure investments, such as in roads and bridges, in support of the industry.

In addition to this ongoing support, Canada's Economic Action Plan provided economic stimulus to the visitor economy through direct funding for marquee tourism events, national parks, cruise infrastructure and marketing. Under the Plan, we also invested billions of dollars in transportation and community infrastructure and in economic development that will provide enduring benefits to the sector.

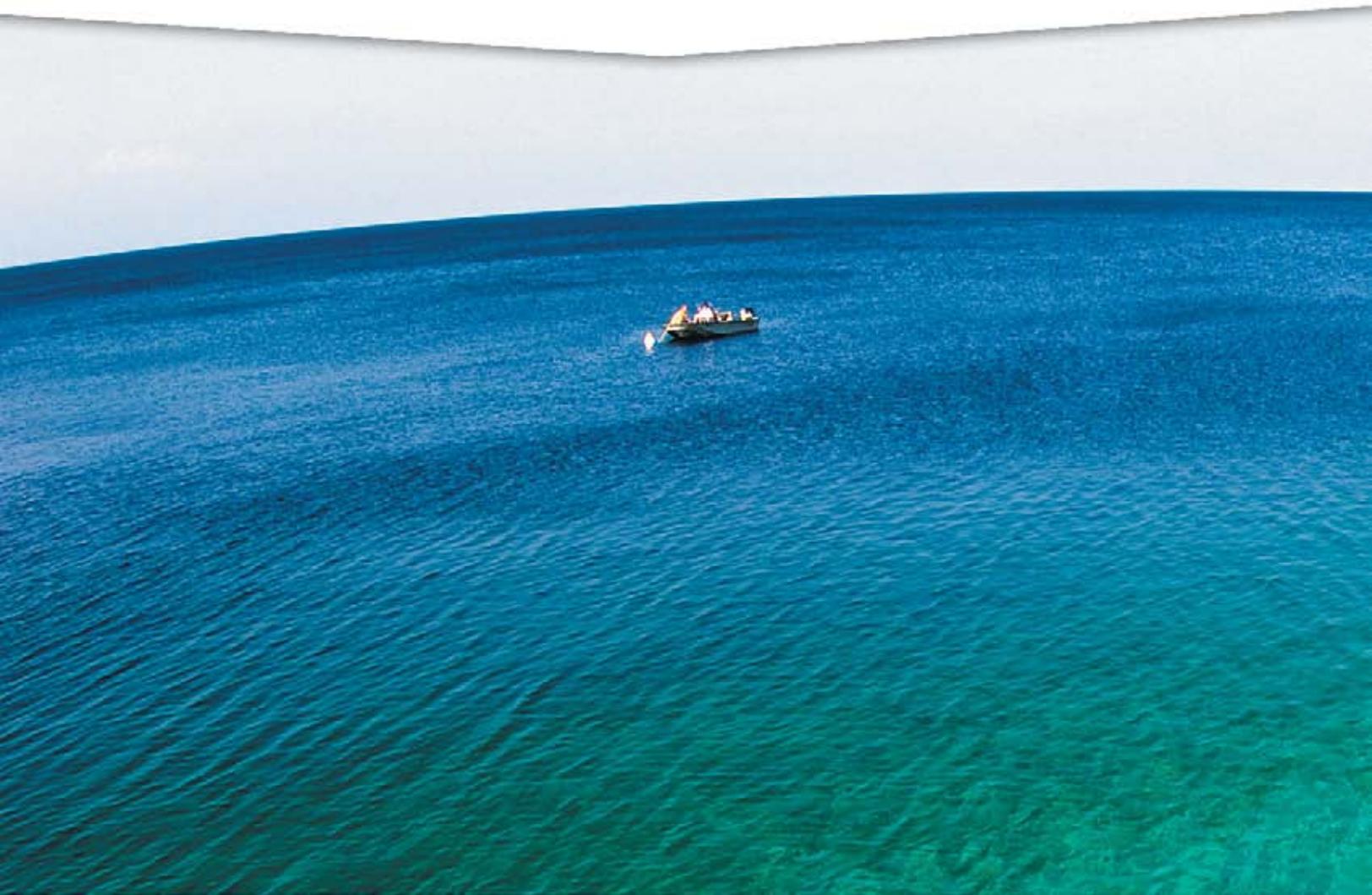
Finally, a number of departments and agencies are responsible for policies and programs that are important to the tourism sector, such as those affecting border access, entry requirements, physical security, international air agreements and foreign relations.



Saint John, NB

The Meetings, Conventions and Incentive Travel (MC&IT) program generates business leads for Canadian partners, such as provincial marketing organizations, destination marketing organizations and hotels. In 2009, MC&IT received funding to develop and expand Canada's overseas business travel market. MC&IT now operates in the U.S. and key overseas markets to turn ordinary events into extraordinary encounters. Recent international MC&IT initiatives include the following:

- an **expanded multilingual, global MC&IT website** to engage high-yield customers and encourage them to host their events in Canada;
- an enhanced **Visit Canada Program**, allowing buyers to experience various Canadian destinations through site inspections and familiarization trips; and
- a new **in-market MC&IT representative** with experience in the U.K. and other key European markets.



Increasing awareness of Canada as a premier tourist destination

The Canadian Tourism Commission leads the way

The Canadian Tourism Commission (CTC) is a federal Crown corporation and our national tourism marketing organization. In partnership with provincial, regional and municipal destination marketing organizations and the tourism industry, the CTC leads marketing initiatives around the world that inspire visitors to explore Canada. It focuses on consumer market segments with the highest potential for return on investment in 11 key foreign markets: Australia, Brazil, China, France, Germany, India, Japan, South Korea, Mexico, the U.K and the U.S. In 2009, *Marketing* magazine recognized the CTC as marketer of the year, highlighting the CTC's social media strategy and highly successful Locals Know campaign.



Ontario Georgian Bay



explorez sans fin
Canada
keep exploring

In 2010, Canada became the number-one overall performing country brand in the world, according to FutureBrand's Country Brand Index. In just four years, Canada—through the efforts of the CTC and its partners from coast to coast—jumped from 12th to 1st place on the strength of a refreshed Canada brand: *Canada. Keep Exploring.*

In 2007, we launched Canada's revitalized tourism brand: *Canada. Keep Exploring.* This brand focuses on Canada's people, geography and culture. It aligns Canada's tourism brand with marketing initiatives and brings together federal, provincial, territorial, municipal and private sector partners. It also strengthens Canada's voice in the competitive international marketplace.

The CTC is a world leader in the use of social media for tourism promotion. For example, the CTC broadcasts social media-style videos from across Canada on its YouTube channel (www.youtube.com/user/canadiantourism). There, visitors can see unique experiences, such as mountaintop yoga in Banff or kite surfing and sand bugging on Nova Scotia's Conrad's Beach. These are just some of the actions the CTC is taking to increase Canada's tourism brand recognition and international ranking.



The 2010 Winter Games afterglow

The Vancouver 2010 Olympic and Paralympic Winter Games were an exceptional opportunity to raise awareness of Canada as an attractive destination. They provided high-profile venues to showcase Aboriginal culture and experiences as well as a broad range of other cultures from across the country. Billions of people were exposed to Canada right in their living rooms.

Recognizing this, we invested \$26 million over five years to take advantage of the international media attention paid to Canada as a result of the Games. In partnership with other levels of government, we supplied international media with thousands of stunning images, hours of high-definition footage and hundreds of inspiring travel stories about Canada.

These efforts paid off and resulted in this material being viewed more than five billion times in television broadcasts and seen nearly four billion times in print media. Heightened interest in Canada led to substantially increased traffic on CTC websites and increased measurable travel interest in nearly all of our key international markets. This awareness is translating into travel bookings in core markets as a result of our post-Games marketing campaigns.

This extraordinary event has helped galvanize cooperation among all levels of government and a variety of tourism partners. It has also highlighted the importance of joint efforts to promote Canada to the world with a united voice.

Stimulating tourism during the global economic downturn

Tourism was identified as a strategic priority in Canada's Economic Action Plan. Budget 2009 announced \$40 million in stimulus funding over two years for domestic and international tourism marketing. Using these resources, the CTC focused on priority international markets, including expanding its marketing activities in the U.S. For example, a campaign to spur new visits from Chicago reached 65 percent of travellers in that market. The CTC estimates that this campaign generated approximately \$43.5 million in tourism revenue for Canada and 400 jobs in the Canadian tourism industry.

To encourage Canadians to spend their travel dollars at home, the CTC ran a national advertising program in 2009 and 2010. Forbes.com ranked the hugely successful Locals Know summer campaign among the world's top 10 travel campaigns. Overall, the CTC estimates that this two-year initiative generated \$1.2 billion in tourism revenue and 10,720 jobs in the Canadian tourism sector.

We made a further one-time \$8-million investment through the CTC in 2010 for marketing in priority international markets to help the Canadian tourism industry achieve greater returns in 2010–11 and beyond. Budget 2011 also announced \$5 million for the CTC to promote the Calgary Stampede's 100th anniversary events in key tourism markets.



Sun Peaks, BC



Developing innovative tools

The federal government is committed to helping tourism owners and operators succeed. Through the CTC, we have developed industry tool kits to help small and medium-sized businesses leverage Canada's tourism brand. We also provide tourism intelligence to help operators make business decisions, market and promote their products and services, and find their best customers. These resources help businesses transform their tourism offerings into the extraordinary experiences that will keep visitors coming back.

Showing Canada to the world

Generating new tourism business means developing a strong brand presence internationally. The CTC hosts annual business-to-business marketplaces that bring together Canadian sellers and foreign buyers from different regions of the globe, such as Showcase Canada Asia, taking place October 13–20, 2011, in Busan, South Korea. The CTC also sells Canada at major annual travel trade shows, such as ITB Berlin and the World Travel Market in London.



In addition, the Virtual Museum of Canada (<http://www.museevirtuel-virtualmuseum.ca/index-eng.jsp>) showcases online exhibits and features more than 2,500 heritage attractions and current museum news. This website helps stimulate interest in Canada as a tourism destination and helps travellers plan outings across the country.



The Explorer Quotient® (EQ) is a web tool that goes beyond demographics to examine the motivations and values behind travel decisions. Travellers take an online quiz at <http://eq.canada.travel>, and the EQ suggests a matching vacation adventure.

Facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada's borders

To ensure that Canada's roads, railroads, air lanes and waterways are safe, secure, efficient and environmentally responsible, we invest heavily in our transportation networks.

Facilitating international air travel

Since November 2006, our *Blue Sky* policy has encouraged long-term, sustainable competition and the development of new or expanded international air services. We have negotiated open, new or expanded air transport agreements with more than 50 countries.

- A comprehensive air transport agreement between Canada and the European Union (EU) allows greater freedom for air carriers to fly between Canada and all 27 EU countries. For example, limits on routes for direct services and on the number of weekly flights have been removed.
- We have Open Skies-type agreements with 14 countries, including the U.S., Brazil and South Korea.

Saskatchewan Kyle



- We have expanded agreements with nine countries, including Mexico and Japan, and new first-time agreements with another nine, including Turkey, Panama and South Africa.

Canada now has open agreements with 39 countries representing close to three quarters of our international passenger traffic.

Enhancing passenger convenience

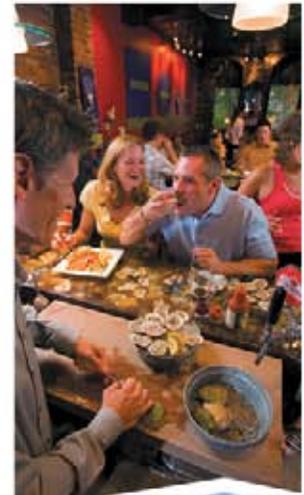
In June 2010, we launched a full review of the Canadian Air Transport Security Authority (CATSA). We announced in February 2011 that, as a result of this review, CATSA screening will be smarter, more efficient and more effective. We harmonized our prohibited items list closely with international standards to improve the passenger screening experience while maintaining a consistently high level of security. We are expanding the use of Trusted Traveller Screening for pre-approved travellers who hold a valid NEXUS card, and new equipment and lane configurations will improve the flow of passengers and bags at security screening checkpoints. CATSA now has dedicated and specially equipped lines for families and passengers with special needs to better accommodate larger items such as strollers and wheelchairs.

Speeding up access to visas

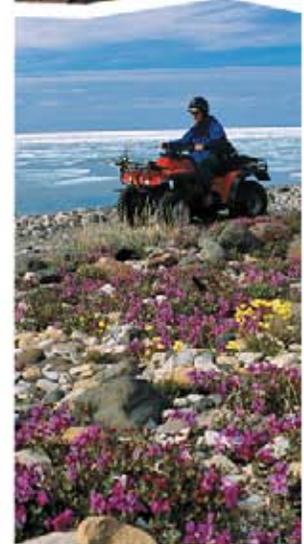
Citizenship and Immigration Canada (CIC) facilitates the entry of genuine travellers into Canada and screens potential travellers to protect the health, safety and security of Canadians. We require people from 143 countries to have visas to enter Canada. We have put in place processes to expedite the movement of legitimate travellers. We now have 40 visa application centres in 21 countries; 19 of these centres have been created in 15 countries since 2007.

In addition, the new 10-year multiple-entry visa introduced in July 2011 is now an option for low-risk travellers from countries whose citizens require a visa to enter Canada. Previously, multiple-entry visas were issued for a maximum of five years only, so this change will make the visa process more efficient for applicants and better use government resources.

We have also been working with international event organizers to make it easier for them to bring people into Canada for events. We provide information on visa and entry requirements and a point of contact at CIC to answer questions. In 2010, we helped the organizers of 170 events.



Charlottetown, PE



Victoria Island, NT

Moving people across the border

The Canada Border Services Agency (CBSA) works with CIC to help legitimate visitors enter Canada. Budget 2010 committed \$87 million over two years to buy state-of-the-art equipment for scanning conveyances and cargo and to upgrade the information systems that underpin effective border operations.

Other recent initiatives include the extension of border clearance services for a second daily Amtrak train between Vancouver and Seattle. Major border infrastructure investments, such as for twinning Route 1 in New Brunswick, are improving access and traffic flow at key land border crossings with the U.S.

Finally, we are enhancing the joint Canada–U.S. NEXUS Trusted Traveller Program, which speeds up customs and immigration clearance for pre-approved, low-risk, frequent travellers.

Yukon Lake Laberge



Improving our welcome

We know that a traveller's experience can be shaped by a single encounter or his or her first interaction in Canada after arrival. Since 2009, signage from the Welcome to Canada program has greeted international travellers arriving at airports with striking images of Canadian travel destinations. These images highlight Canada's spectacular geography, vivid culture and dynamic population. The CBSA and the CTC have also developed interactive training that helps employees enforce necessary security measures while offering a welcoming experience for visitors.

Facilitating movement within Canada

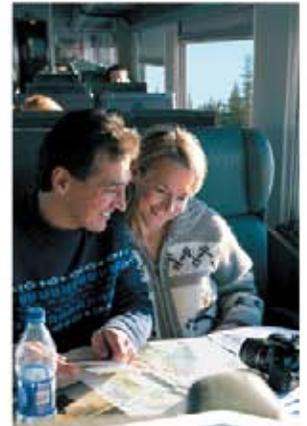
Recognizing the importance of providing safe and efficient transportation for travellers in Canada, we are making major investments in Canada's transportation infrastructure, including providing \$379.5 million since 2009 for various repairs to the Champlain Bridge in Montréal and \$923 million to upgrade VIA Rail passenger services. We are also modernizing Canada's transportation infrastructure by investing in other passenger rail services and in ferry services, using new resources to enhance aviation security in Canada, and ensuring the continued safety and reliability of federal bridges.

Encouraging product development and investments in Canadian tourism assets and products

The federal government is directly involved in the tourism business. We operate key attractions, such as parks and museums, and work with other levels of government to develop tourism infrastructure and create tourism experiences. These activities promote economic growth, diversification and job creation. Combined, they show our commitment to developing tourism products and to maintaining key cultural, natural and historic destinations, both in rural communities and urban areas.

Improving national parks

Our country has one of the world's greatest national parks systems. It attracts visitors, generates economic activity and brings our natural heritage closer to Canadians. We protect and manage the ecosystems of natural areas so that visitors can understand, appreciate and enjoy them in a way that will preserve them for generations to come.



Churchill, MB



Two Lakes Provincial Park, AB



Parks Canada manages 42 national parks, 167 national historic sites, 3 national marine conservation areas, and 10 of Canada's 15 UNESCO World Heritage Sites. In the past five years, we have taken steps to add nearly 90,000 km² to the lands and waters of our national parks system. In 2010, we celebrated the 125th anniversary of Canada's first national park, in Banff, and in 2011, we are marking the 100th anniversary of Parks Canada, the first national parks service in the world.

Our goal is to attract 10 percent more visitors to Canada's national parks and historic sites over the next five years by increasing their attractiveness as destinations and improving the quality of visitor experiences. In addition, we have frozen a number of fees, including entry fees, to help more Canadians experience treasured natural and historic places.

Parks Canada received funding of \$374 million over two years through Canada's Economic Action Plan to upgrade facilities, including visitor centres, campgrounds and roads at national parks and national historic sites throughout the country. These projects include improved roads in Banff National Park, repaired walls and arches at the Halifax Citadel National Historic Site, and restored gates in the fortifications of the Québec National Historic Site. Budget 2011 also announced \$5.5 million over five years to establish Mealy Mountains National Park in Labrador.

Quebec Québec



Fostering cultural and sports tourism

Our museums and national historic sites promote greater understanding and appreciation of our history and people throughout Canada and internationally. We support cultural, arts, heritage, official language, citizenship, Aboriginal, youth and sports initiatives, all of which benefit tourism in Canada.

We also support special occasions, whether annual events, such as Canada Day, or anniversaries, such as Québec's 2008 quadricentennial. Budget 2011 announced \$5 million to support lead-up commemorations and festivals in communities across Canada to celebrate the Grey Cup's 100th anniversary in 2012. Sport Canada's Hosting Program helps organizations put on major international sporting events, such as the World Men's Curling Championships that took place in Regina in 2011.



Kimberley, BC





Canadian Heritage funds festivals and arts programs across Canada. These make communities not only richer and more interesting places to live but also more interesting places for tourists to visit.

Through Canada's Economic Action Plan, we delivered the two-year Marquee Tourism Events Program to support world-class programs and experiences. In its first year, the program funded 60 marquee festivals and events across Canada. In its second year, the program invested in 47 festivals and events, spreading its support to smaller communities.

Supporting tourism businesses

We help businesses and organizations improve their tourism products, events and attractions. This support includes not only strategic promotion activities but also efforts to develop tourism capacity through training, market readiness, quality assurance and mentoring programs. We often provide financial support in partnership with other levels of government and with Aboriginal communities.

From 1999 to 2009, the Canada Small Business Financing Program encouraged financial institutions to lend more than \$4 billion to 40,000 small tourism-related businesses. The Business Development Bank of Canada currently has about \$1.97 billion in financing invested in the tourism sector.

Investing in tourism and cultural infrastructure

The Building Canada Plan and Canada's Economic Action Plan both invest in infrastructure that benefits tourism, such as convention centres, exhibition halls, arts centres, and sports, recreational, cultural and heritage assets. Through its Canada Cultural Spaces Fund, Canadian Heritage also supports the construction and renovation of facilities for the performing, visual and media arts and for museum collections, heritage displays and exhibitions.

Promoting the National Capital Region as a key attraction

One of the country's most popular tourism destinations is the National Capital Region. The National Capital Commission spends \$11.5 million annually on tourism-related activities and uses federal assets to make the National Capital Region a source of pride and unity for Canadians. To that end, we have formed the Federal Partners' Committee to share best practices and to coordinate programming, marketing and communications initiatives. Successful collaborations include putting on joint programs with national institutions as part of Winterlude and Canada Day, developing the Canada's Capital Museums Passport and carrying out joint marketing of educational programs for youth.

Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality

Canada needs a tourism workforce that can help make every visitor experience an exceptional one. We are working closely with provincial and territorial governments, and supporting the Canadian Tourism Human Resource Council (CTHRC), to address labour market issues and promote professionalism in the tourism industry. In April 2010, Human Resources and Skills Development Canada committed \$19.8 million to support the CTHRC over three years to address significant skills shortages and foster a human resources development culture in the tourism sector.

The CTHRC brings together tourism business operators, members of labour unions and associations, educators and government representatives. It supports strategic human resources and business management practices with tool kits, training guides and business tools and promotes the advantages of working in the sector. Through its *emerit* brand, the CTHRC has developed occupational standards and professional certification programs. It also runs the Ready to Work program, which provides skills development to facilitate the recruitment and retention of workers who are members of vulnerable groups, and the Canadian Academy of Travel and Tourism, an industry-education partnership that promotes tourism career opportunities and actively engages high school students in the tourism workforce. These initiatives contribute to the productivity and professionalism of the tourism workforce.



Calgary, AB



For employers and professionals in the Canadian tourism sector, *emerit* is the most recognized training and certification brand. It has become synonymous with excellence, credibility and professionalism. The *emerit* website (<http://emerit.ca>) offers a wealth of career development resources for professionals in tourism.

We are supporting the CTHRC in the creation of a certification program for heritage interpreters and guides in national parks and at historic sites. This program is developing the professional potential of staff while improving customer service.

Gathering world-class statistical analysis and research

We generate a wealth of data and information on the tourism sector. Statistics Canada conducts the International Travel Survey and the Travel Survey of Residents of Canada. It also maintains the Tourism Satellite Account, from which the National Tourism Indicators are derived. These statistical measures, in turn, help us, as well as the industry, carry out important analysis.

The CTC also conducts important marketing research and analysis that it shares with its partners and with the tourism community at large.

We also generate research on the visitor economy through Parks Canada, Canadian Heritage and Human Resources and Skills Development Canada.



Bringing it all together

Canada's unparalleled beauty and natural wonders contribute significantly to our value as a sustainable and top-of-mind tourist destination amid robust international competition. Considerable federal support helps build on these natural advantages, but we can do more to help the industry gain a competitive edge. We must bring greater coordination to our existing tourism support and strive for greater coherence in policy decisions affecting the industry. Increased alignment of federal efforts will better position Canada's industry for long-term growth.



Lake Louise, AB

3 A New Approach



British Columbia Rossland

A New Approach

Our objective

Implement a whole-of-government approach to enhance the federal government's role as an effective partner with industry and other levels of government in support of an internationally competitive tourism sector.

Our guiding principles

Under a new whole-of-government approach, federal departments and agencies will be guided by four principles for sustainable tourism:

- foster an open and cooperative partnership with the tourism industry;
- apply a tourism lens to policy and program development;
- enhance program coherence and accountability among federal departments; and
- focus future tourism investments on Federal Tourism Strategy priority areas.

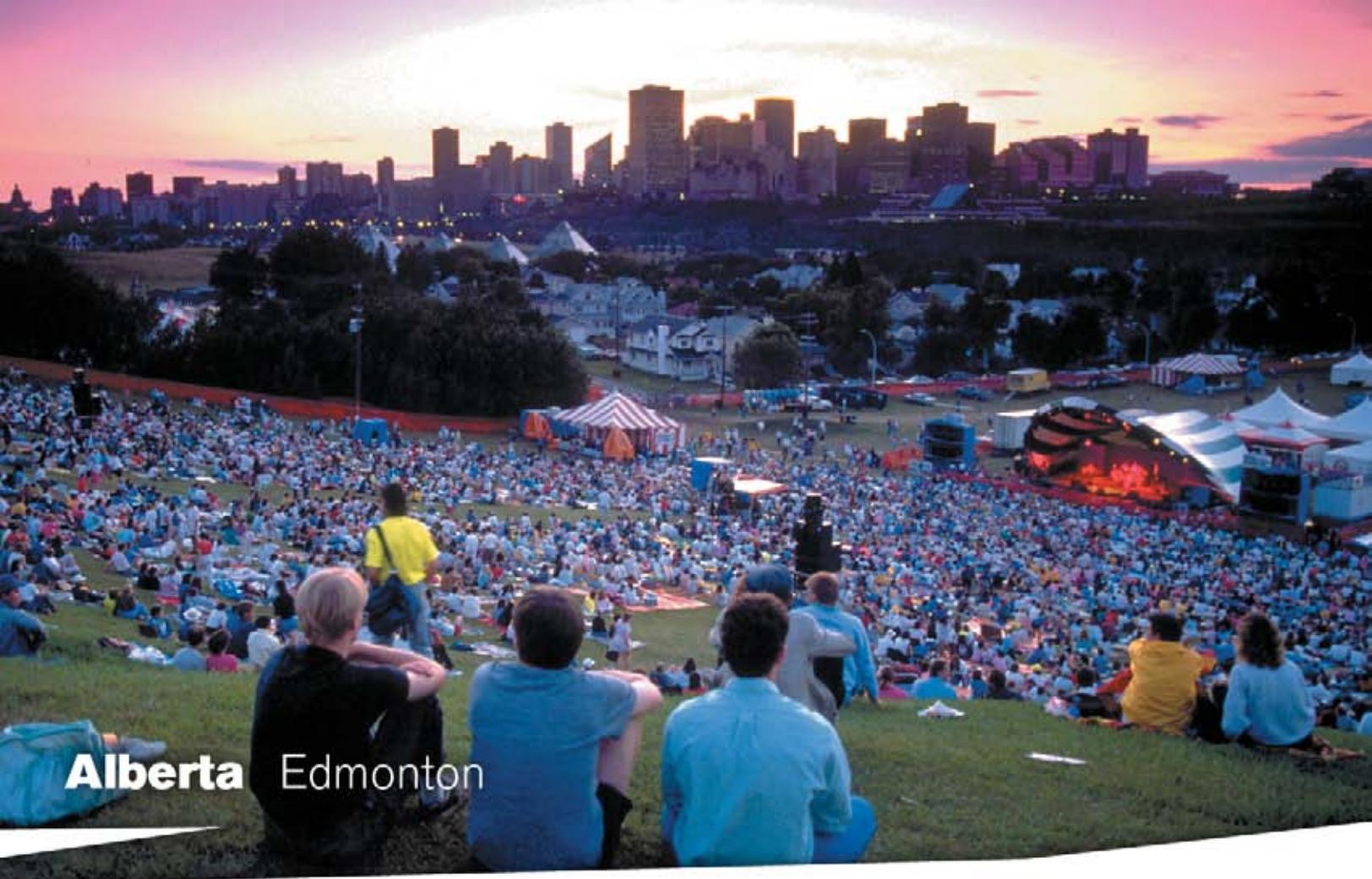
Application of these principles to day-to-day decision making and operations will make a difference in outcomes for the tourism industry. To help turn these principles into actions, we will do the following.

Develop a forward agenda for tourism

A key element of our new approach is ongoing communication within government on federal plans and priorities affecting tourism now and in the years to come. Industry Canada will chair a group of senior federal executives to oversee and guide implementation of the Federal Tourism Strategy. The group will develop and maintain an integrated and forward-looking federal tourism agenda that is responsive to market conditions and demands. The agenda will include legislative, regulatory, policy, program and operational initiatives from individual departments and agencies.



Montréal, QC



Grafton, ON
Mount Stewart, PE



Formalize tourism industry engagement

Engaging the industry will enable it to play a more strategic role with government. Federal departments and agencies will regularly invite members of the industry representing a broad range of perspectives from across the entire sector, including industry leaders, association heads, and tourism business owners and operators, to participate in meetings with senior federal executives. Frequent industry engagement will ensure timely and accurate information exchange, encourage the industry to identify priority issues as they arise and share industry-led initiatives, and foster coordinated and collaborative action. This exchange will foster more cohesive industry input to public policy consultations.



Create a tourism business website

A new tourism website will provide the industry with a central portal to get information on relevant federal programs, services and announcements.

Tourism enterprises typically have few employees, and operators lack the time and means to develop individual tools to improve their products. To help tourism businesses develop innovative products and services, we have already made some 100 resources available. These include economic development advice, business development tools, occupational standards, market research and analysis, and a broad range of training materials.

However, this information is spread across numerous government websites. We will build on the single-window approach used by the Canada Business website to give tourism operators quick access to these resources. This approach will facilitate access to federal tourism-related information and tools and will give provinces and territories the option to add their own tourism-related information.

Coordinate tourism research

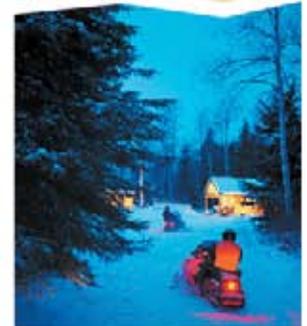
To make more effective use of federal research efforts, Industry Canada and the Canadian Tourism Commission (CTC) will convene an annual forum for federal departments and agencies to exchange results of and plans for tourism-related research and analysis, beginning in 2012. We will use the information gathered at this event to identify opportunities for greater collaboration among researchers to ensure that more cohesive analysis informs policy, program and industrial development.

Produce a tourism annual report

To keep the tourism industry and Canadians informed about progress on the Federal Tourism Strategy, the Minister of State (Small Business and Tourism) will, starting in 2013, report annually on the concrete measures taken by the federal government. The report will complement existing reporting of federal tourism expenditures. It will also provide an overview of the tourism industry and of the way departments and agencies contribute to the broader, government-wide tourism priorities outlined in the Federal Tourism Strategy.



Thunder Bay, ON



Saskatchewan

Toronto, ON



Winnipeg, MB



Supporting the four priorities

In the face of global competition and greater consumer choice, Canada needs to do more to develop and promote its tourism products and to capitalize on high-profile events such as the Vancouver 2010 Olympic and Paralympic Winter Games. Building on ongoing programs and new mechanisms, we will take a number of initial steps aligned with each of the four priorities.

1. Increasing awareness of Canada as a premier tourist destination

Leading tourism missions

Canada is seen as a desirable travel destination in many emerging markets, including India, China and Brazil. The growing number of middle-class travellers view Canada as safe, accessible, well governed and capable of providing desirable travel experiences and luxuries.

China is a fast-growing tourism market with great potential. Its outbound travel market will grow to 100 million trips by 2020, if not sooner, up from 45.8 million in 2008. On June 24, 2010, we officially signed a memorandum of understanding with China to implement Canada's Approved Destination Status. This is an important milestone that enables Canada to market directly to Chinese consumers and to host Chinese tour groups. This will increase the growth in revenues from Chinese tourists.

In October 2010, the Minister of State (Small Business and Tourism) led a delegation of provincial and industry leaders to promote Canadian tourism in China. The mission, the first of its kind, was planned to complement the CTC's major business-to-business sales event in Asia (Showcase Canada-Asia 2010) and brought together a mix of provincial tourism ministers, representatives from provincial, regional and municipal destination marketing organizations, and private sector tourism operators and suppliers.

Future tourism-focused ministerial missions will help maximize product awareness while providing opportunities for increased business and economic benefits. These missions will better enable us to open doors for Canadian businesses, strengthen relationships and enhance links with our international counterparts, and better complement Canada's international trade priorities.

Realigning the CTC's business model

The CTC is shifting substantial funds to invest in more marketing programs within high-yield, long-haul international source markets. In 2011, the CTC ceded consumer advertising and trade development activities in the U.S. to Canadian destinations, such as provincial and regional marketing organizations, many of which are already invested in the U.S.

The CTC will keep some investments in the U.S. market through a more selective channel strategy, which includes the Meetings, Conventions and Incentive Travel program, and media and public relations activities.

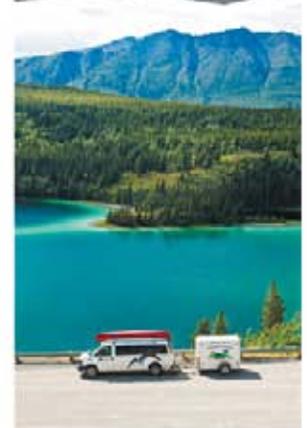
The CTC also reorganized to follow a regional hub model by consolidating international offices, a best practice among national tourism marketing organizations. These changes will allow for significant administrative savings. Altogether, a realignment of the CTC's business model will free up significant resources by 2012 to market Canada overseas. This kind of additional investment will help the Canada tourism brand gain strength and inspire more travellers to visit Canada.

Modernizing the CTC board

To make the CTC more effective in supporting the sector, a review of its governance was conducted in 2008. The review recommended that the CTC's board of directors be reduced and restructured so that it is based on skills and expertise rather than regional and sectoral representation. The CTC will have 14 fewer board positions as part of our plan to improve efficiency and governance across federal departments and agencies. These changes, which are planned to come into effect in 2011, will help the CTC become more strategic and relevant to industry and government by creating a truly modern corporate board structure able to deliver on the CTC's mission.



Halifax, NS



Yukon

Hay River, NT



Rigaud, QC



Establishing the Signature Experiences Collection

We are, through the CTC, establishing the *Signature Experiences Collection*, an inventory of export-ready experiences that exemplify Canada's tourism brand. The program will give operators a chance to profile their uniquely Canadian tourism experiences, which align with our tourism brand, in CTC marketing to connect with more international travellers.

This work builds on two other sector-focused efforts by the CTC: *Significant 28 Aboriginal Cultural Tourism Experiences* and *Canadian Spa Experiences*. In both cases, the CTC has been working with industry and other stakeholders to identify experiences that support Canada's tourism brand. The CTC will then profile these experiences in its channels to add depth and breadth to Canada's tourism brand.

Partnering to promote Canada

- The Atlantic Canada Opportunities Agency (ACOA) and the CTC will partner to promote Atlantic Canada as a leisure destination in priority international markets.
- ACOA and Canada Economic Development for Quebec Regions will investigate collaborative opportunities with private partners to establish Eastern and Atlantic Canada as a premier cruise ship destination in targeted U.S. and European markets.
- Agriculture and Agri-Food Canada and the CTC will further capitalize on their shared objectives of branding Canada as a supplier of safe and high-quality food and as a premier travel destination for culinary excellence.
- Aboriginal Affairs and Northern Development Canada (AANDC) will work with the CTC to provide more Aboriginal cultural tourism experiences to market. They plan to expand the number of Aboriginal products under the CTC's marketing program to include those offered by both Aboriginal-owned businesses and Aboriginal-partnered organizations by March 31, 2014.



2. Facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada's borders

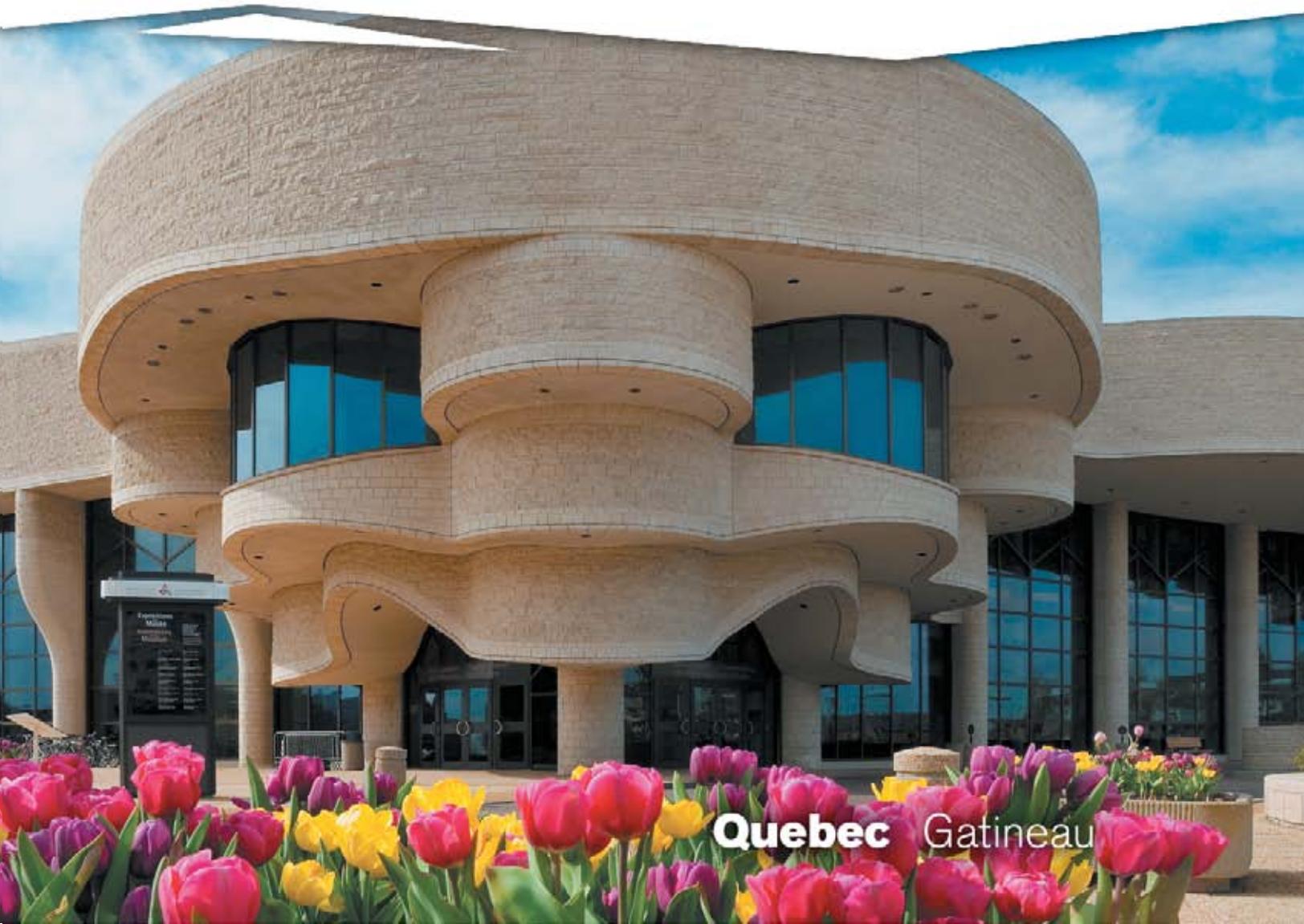
Consultations on air services priorities

We recognize the positive economic impact of new and expanded international air services on the tourism industry. This is one reason we adopted the *Blue Sky* international air policy in November 2006. It aims to encourage sustainable new and expanded international air services.

Looking forward, we will continue to implement the *Blue Sky* policy. In doing so, Transport Canada will regularly consult the tourism industry for the development of Canada's proposed calendar of air services negotiations. In this context, the tourism industry will be asked to provide information, in consultation with Industry Canada, on its market priorities, which Transport



Québec, QC



Quebec Gatineau



Canada will take into account in its annual planning cycle. Information sharing with the tourism sector on the implementation of the *Blue Sky* policy will also be strengthened so that decision makers have ongoing awareness of opportunities under bilateral air agreements and Canada's charter regime.

Improved border experiences

To ensure a positive experience for our international guests, the Canada Border Services Agency (CBSA) and its employees will provide integrated border services that are courteous, fair and professional. To that end, the CBSA has developed a Service Commitment, has enhanced its focus on service standards and has improved the mechanisms to address complaints.

The CBSA and the CTC will explore opportunities to build on the successful 2010 Winter Games Welcome to Canada program. Welcome to Canada signage greets international visitors at key border entry points with images and messages showcasing Canada and its exciting tourism experiences.

Enhanced visa services

To make it easier to come to Canada, Citizenship and Immigration Canada (CIC) will expand its network of visa application centres. CIC will also consult key federal partners to guide visa policy decisions and their implementation. This will supplement the regular dialogue across the federal government and with industry provided for under the Federal Tourism Strategy.

CIC will also work with the CTC and Industry Canada to promote Canadian tourism and tourism products at visa application centres. In preparation for the introduction in 2013–14 of biometric enrolment for some applicants requiring travel visas, CIC will develop a communications strategy to promote the use of multi-entry visas.

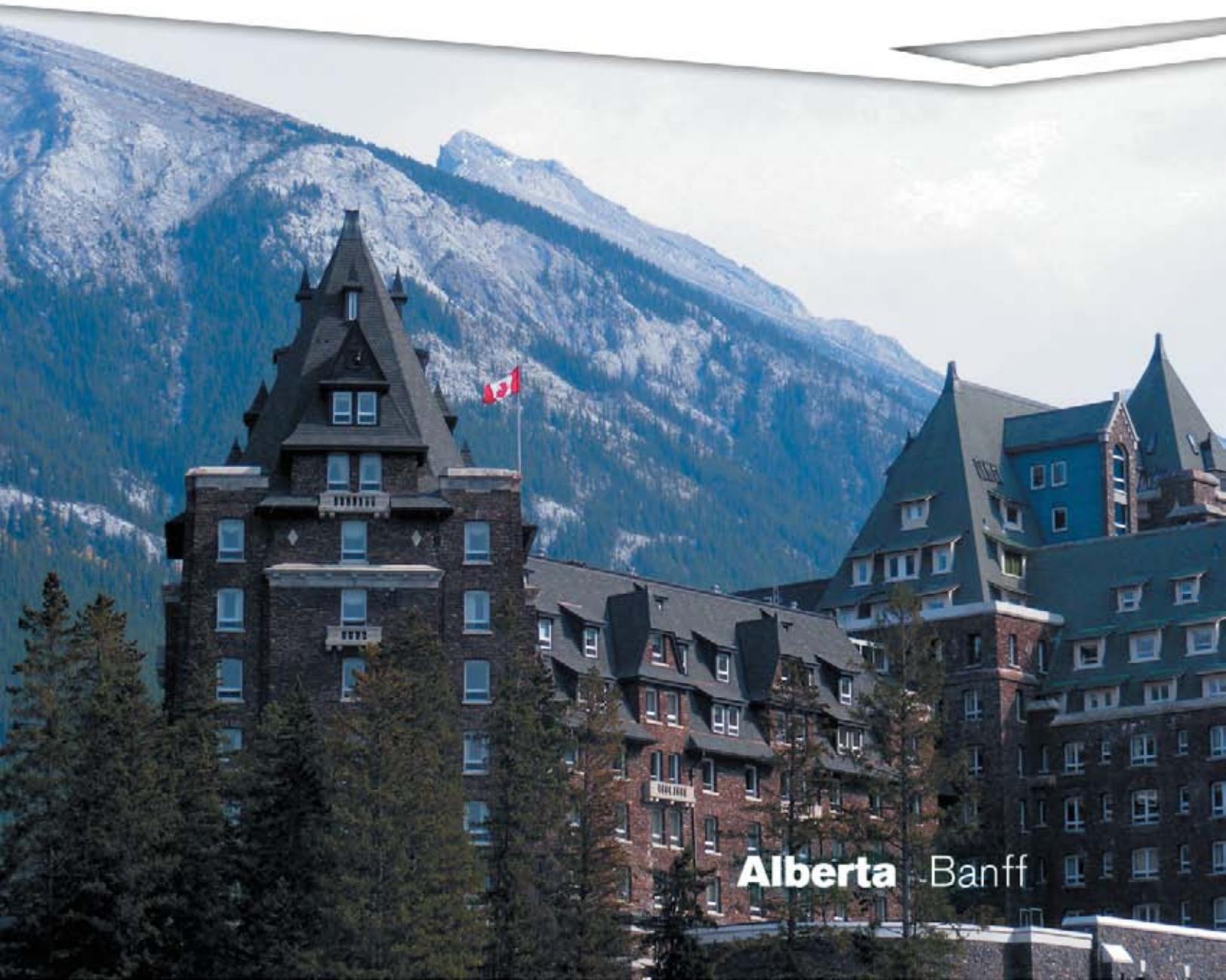
Foreign Convention and Tour Incentive Program

To support our tourism sector and further secure Canada's place as a destination of choice for group travel, the Department of Finance Canada and the Canada Revenue Agency will meet with representatives of the tourism industry to examine the operational design and administration of the

Foreign Convention and Tour Incentive Program and to explore the feasibility of changes that would improve the program's effectiveness while maintaining the current scope of the program and a high standard of accountability.

Rental cars

To help facilitate access to Canadian tourism destinations, the government will review existing restrictions that make it difficult for Canadian residents to drive U.S.-based rental cars into Canada and consider how these restrictions can be eased.



3. Encouraging product development and investments in Canadian tourism assets and products

Analysis of the potential role of signature attractions

As tourism enterprises and attractions invest to better align their products with Canada's tourism brand, they will need to exploit the opportunities presented at and among destinations. This requires engagement, collaboration and an enhanced understanding of how combining and linking experiences affects visitor numbers and economic growth.

To begin this process, we will commission a third-party analysis of the potential role of signature attractions, including hub or gateway cities, in stimulating economic growth in the tourism sector. In addition to giving private and public sector tourism partners a chance to inform the analysis, the federal government will convene a stakeholder-partner forum in 2012 to examine the results of the study and share best practices. Based on the results, we will then consider more focused and structured activities to help strategically important destinations and attractions realize their full potential.

The following are other activities we are undertaking to support product development and investment.

Aboriginal and parks activities

- By March 31, 2013, Aboriginal Affairs and Northern Development Canada (AANDC) will create a suite of online tourism development tools to help community-based organizations pursue opportunities, attract investment, assess market readiness and overcome capacity obstacles.
- AANDC will analyze cruise industry opportunities for Aboriginal tourism by March 31, 2014.
- By March 31, 2012, Parks Canada and AANDC will conduct a pilot project to establish at least five Aboriginal cultural tourism businesses in or near Canada's national parks and historic sites.
- Parks Canada will propose amendments to the current communications policy to permit third-party advertising in park publications and to better support tourism businesses in park communities.

Kaay Llnagaay, BC



Cavendish, PE



Agriculture and rural linkages

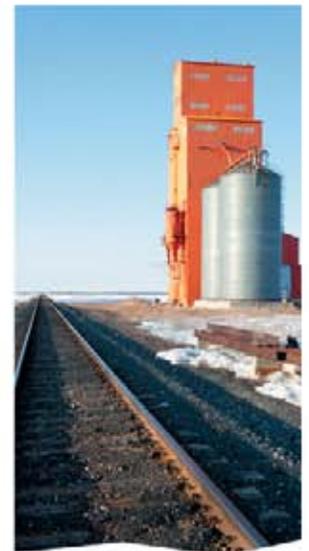
- By the end of 2011, Agriculture and Agri-Food Canada (AAFC) will review its programs and services to identify and improve those related to agri-tourism.
- Until 2013, the Rural and Co-operatives Secretariat of AAFC will help communities identify and plan for tourism opportunities through cooperative development and amenities-based rural programming.

Cultural programming

- Canadian Heritage will work with federal partners to maximize the reach and impact of its activities and projects that draw tourists, such as major commemorations, celebrations and sporting events.
- Canadian Heritage will identify programs whose recipients, such as art galleries and theatre groups, are most likely to be linked to the tourism industry. These programs will include a Federal Tourism Information Kit with their program documentation, outlining resources and guidance available to the Canadian tourism industry.

Regional development

- The Federal Economic Development Initiative for Northern Ontario (FedNor) will deliver the ACOA VISIT Program or a similar one in Northern Ontario to provide tourism training to front-line economic development personnel.
- Industry Canada will coordinate federal tourism activities related to official language minority communities by leveraging the existing interdepartmental network for these communities.



Carey, MB



Kingston, ON



4. Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality

National recognition initiative

The Canadian Tourism Human Resource Council (CTHRC) plays an important role in fostering industry commitment and action to address skills development and labour market issues. The Minister of State (Small Business and Tourism) will showcase the attractiveness of tourism careers and highlight organizations with exemplary human resources practices.

The Minister of State will also highlight the importance of meeting national standards for knowledge, skills and attitude within the tourism industry, using the CTHRC's *emerit* certification program. *Emerit* includes more than two dozen occupations, and we will encourage federal organizations to implement *emerit* for these jobs, when feasible. We will also recognize individuals and organizations—including tourism operators, educators and human resources groups—that have adopted certification programs or trained a skilled workforce effectively.

Parks and employee certification

Parks Canada will partner with the CTHRC to develop certification programs for park and site interpreters. It will also collaborate with federal heritage organizations to adopt certification programs that emphasize a consistent approach to service standards and ensure a quality visitor experience.

Parks Canada will finish certifying all park interpreters by 2012 and will expand this work to other tourism-related job categories.

Making it happen

In June 2009, the Prime Minister met with industry leaders to announce that we were developing a Federal Tourism Strategy to bring greater coherence to the policies and programs that support tourism in four priority areas: (1) increasing awareness of Canada as a premier tourist destination, (2) facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada's borders, (3) encouraging product development and investments in Canadian tourism assets and products and (4) fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality.

We listened to and learned from those who make their living in the tourism business and from our colleagues at all levels of government. We also observed how other national governments are responding. As a result, the Federal Tourism Strategy not only outlines a number of new tourism-specific measures but also brings into effect a set of government principles to guide and inform all departments and agencies as they develop and administer policies and programs. It builds on the framework for federal-provincial-territorial collaboration and is an important step toward achieving the national revenue target for the tourism sector of \$100 billion by 2015.

The Strategy will, over time, lead to more transparency, collaboration and consistency in federal activities that relate to tourism. This is not a quick fix; it is about creating a culture of partnership across the federal government and with private and public sector organizations in support of the tourism sector. The Strategy is a living document, providing a framework for the federal government to continue to help make Canada a sustainable and top-of-mind tourist destination, renowned worldwide for its exceptional and unique year-round travel experiences.

While we can improve the way we do business, the growth of our visitor economy depends first and foremost on private sector leadership. Industry must make the necessary investments and innovations to ensure Canada's tourism products keep pace. A diverse collection of voices and opinions must come together around shared interests to inform Canadians of just how important tourism is to our country and our economic livelihood. Effective partnerships across all levels of government will foster ongoing development in the people, products and destinations that will continue to draw visitors.



Prince Edward Island Park Corner

The competition to attract visitors is fierce, and the costs of not changing how we approach tourism are too high. The Vancouver 2010 Olympic and Paralympic Winter Games proved that we could bring together the best ideas from the public and private sectors to show the world that Canada is one of the best places in the world to visit.

Canadians followed the Olympic torch as it travelled from one end of the country to the other, past picturesque fishing communities, through world-class cities, across vast tracts of stunning scenery, over the breathtaking Rockies and into Vancouver, where Canada welcomed the world. It is time to pick up that torch and carry the same spirit of collaboration as we move forward and make the most of all the opportunities that lie ahead for Canada's tourism industry.



Newfoundland and Labrador Gros Morne National Park

Appendix

Federal Tourism Roles and Responsibilities

The federal government, 10 provincial governments and 3 territorial governments, as well as municipalities, all have a role to play in supporting tourism.

The Canadian Council of Tourism Ministers fosters coordination between the federal and provincial-territorial levels of government.

Within the federal government, the Minister of Industry has the lead responsibility for tourism, as part of a mandate to foster a fair, efficient and competitive marketplace, an innovative economy, competitive industry and sustainable communities. The Minister of State (Small Business and Tourism) has specific responsibility to promote tourism and small business development.

The Canadian Tourism Commission is Canada's national tourism marketing organization; it is a Crown corporation that reports to Parliament through the Minister of Industry.

A number of federal government departments and agencies provide significant support for tourism through funded programs and through the direct control and operation of tourism attractions:

- Agriculture and Agri-Food Canada helps rural Canada develop and maintain strong, adaptable and vibrant communities, supporting, for example, wine and culinary tourism.
- Canadian Heritage is responsible for national policies and programs related to arts and cultural industries, heritage, official languages, citizenship participation and identity, human rights, Aboriginal peoples, youth and sports initiatives, as well as national ceremonies and symbols.
- Human Resources and Skills Development Canada promotes skills development, labour market participation and inclusiveness and ensures labour market efficiency.
- Aboriginal Affairs and Northern Development Canada administers Aboriginal economic development programs that support a wide range of initiatives, including those related to tourism.
- Parks Canada is the steward of the national parks and historic sites system.

The following regional development agencies each foster economic development in a variety of sectors, including tourism:

- Atlantic Canada Opportunities Agency
- Canada Economic Development for Quebec Regions
- Canadian Northern Economic Development Agency
- Federal Economic Development Agency for Southern Ontario
- Federal Economic Development Initiative for Northern Ontario
- Western Economic Diversification Canada

Some departments and agencies are responsible for policy matters, such as border access, entry requirements, international air service agreements and foreign relations. They also play other essential roles that have an impact on travellers:

- The Canada Border Services Agency manages the cross-border movement of eligible travellers and goods into Canada.
- Citizenship and Immigration Canada sets visa policy, administers visa operations, and admits immigrants, foreign students, visitors and temporary foreign workers who help sustain Canada's social and economic growth.
- Foreign Affairs and International Trade Canada negotiates international air agreements and trading arrangements with other countries and enhances Canada's image abroad to increase economic opportunities.
- Transport Canada is responsible for transportation policies and programs as well as infrastructure programs.
- The Canada Revenue Agency administers the tax laws for the Government of Canada and for most provinces and territories as well as the social and economic benefit and incentive programs delivered through the tax system.
- The Department of Finance Canada develops policies and provides advice to the federal government to create a healthy economy for all Canadians. This responsibility includes designing and analyzing Canada's tax policies.
- The Business Development Bank of Canada provides Canadian businesses with flexible financing, venture capital and affordable consulting services.

There are many other Government of Canada organizations that also carry out mandates that are relevant to tourism. These include portfolio partners, such as the National Capital Commission, our national museums and galleries, and Via Rail Canada.

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Inside front cover	Churchill, MB	Canadian Tourism Commission
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