

DESTINATION DEVELOPMENT STRATEGY

Destination Canada
June 2023





ACKNOWLEDGMENT

At Destination Canada, we acknowledge the Indigenous Peoples of all the lands that we work and live on. We do this to reaffirm our commitment and responsibility in improving relationships between nations and our own understanding of local Indigenous peoples and their cultures. From coast to coast to coast, we acknowledge the territory of the Inuit, Métis, and First Nations people who have called this place home for generations beyond measure.

As storytellers and representatives of Canada's tourism sector, we recognize our position of influence in reflecting the many voices and places that makeup Canada. We also value the importance of working together with partners and acknowledge their input to inform Destination Canada's Destination Development Strategy.

Destination Canada's Destination Development Team would like to extend its heartfelt gratitude and appreciation for the invaluable time, contribution, and support of stakeholders in shaping and advancing Destination Canada's Destination Development Strategy. The level of guidance and collaboration from partners have and will continue to play a pivotal role in creating exceptional visitor experiences and driving the thoughtful and sustainable growth of our nation's destinations. We also thank Destination Canada's Board and colleagues who helped inform this report.

Together, we are making significant strides in positioning Canada as a stellar destination that showcases the richness of our natural and cultural heritage as well as our urban, rural, and remote landscape. The expertise, dedication, and resources shared by stakeholders continue to be vital in implementing strategic initiatives and developing comprehensive destination plans aligned with regenerative tourism principles.

Our collective efforts foster economic growth, enhance visitor experiences, and prioritize the preservation of our unique assets, ensuring that Canada remains a top choice for global travellers. While expressing our gratitude, we recognize that our work has just begun. The challenges and opportunities ahead require ongoing partnership, innovation, and adaptability. We are excited to continue this journey together, seizing new opportunities and addressing emerging trends in the ever-evolving tourism landscape.

Together, we will shape the future of Canada's destinations and create lasting legacies for generations to come.

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EXECUTIVE SUMMARY

To become a preferred choice for travellers, Canada must offer stellar, true to Canada experiences that respond to high-values guests and meet current and enduring market demands. Destination Canada has established a baseline understanding of current destination development in Canada and, through its internal Destination Development team, is pursuing a two-track approach to destination development that drives near-term success and begins the transformation for long-term growth.

Destination Canada engages in destination development through Thought Leadership, and Planning & Strategy to empower Canada's tourism industry, enable growth and expertise in destination development, and maximize collective impact for Canada. Destination Canada partnered with Resonance Consultancy to embark on a comprehensive stakeholder engagement process combined with global benchmarking research to identify gaps and opportunities in Destination Canada's current destination development work and refine DC's role within destination development. The recommendations were informed by more than 35 interviews with DMOs, PTMOs, government entities, and tour operators across Canada and extensive research on 25 tourism destinations across 6 continents.

Destination Canada engages in Thought Leadership by providing a platform for knowledge-sharing, fostering innovation through dialogue, and providing resources,

data, and expertise. Key thought leadership initiatives include the development of a knowledge platform hub, the speaker series, the launch of an International Symposium on Destination Stewardship, the definition of a regenerative approach to tourism, destination development, and stewardship principles for Canada.

Destination Canada engages in Planning & Strategy by remaining consistent with changing market trends and addressing visitor and resident needs. Through effective planning, Destination Canada has developed a targeted strategy and is focused on making strategic decisions rooted in robust research and tourism data that will enhance Canada's economy. Key planning and strategy initiatives include the convening of the National Destination Development working group, the centralization of a roster of investors and consultants, the cluster mapping (GIS), the corridor tourism strategy program, the targeted development of fall and winter seasons, public relations on the importance of tourism, and the support for tourism investment.

The Destination Development Strategy is designed to solidify Canada's global reputation as a progressive, innovative leader in destination development, and provide a roadmap for the Destination Development team.

CONTENTS

- 01** **INTRODUCTION**
PAGE 06
- 02** **DESTINATION DEVELOPMENT ASSESMENT**
PAGE 09
- 03** **DESTINATION CANADA'S ROLE IN DESTINATION DEVELOPMENT**
PAGE 18
- 04** **DESTINATION DEVELOPMENT FOCUS AREAS**
PAGE 22
- 05** **DESTINATION DEVELOPMENT ROADMAP**
PAGE 30

01

INTRODUCTION



Brudenell Riding Stables

Prince Edward Island



Clear Lake

Wasagaming

Manitoba

OVERVIEW

Destination Development has taken frontstage across the world as tourism has become more widely recognized as one of the largest industries contributing to global economies, employment, and quality of life. Destination Canada started its work on destination development in the beginning of 2021, where extensive preliminary research was conducted to develop a baseline understanding of the status of destination development in Canada, identify partners across the country, and develop a draft strategy going forward. Since then, Destination Canada created an internal Destination Development business unit and recruited a robust team with extensive experience in the destination development space to lead this work. Destination Canada also hired an Indigenous Relations specialist for the Destination Development team to lead engagement related to destination development activities, support the development of an internal reconciliation strategy as well as increase the cultural competency level of Destination Canada as an organization. The team identified areas of focus for the business unit and organization, identified Wealth & Wellbeing indicators, and developed a regenerative framework.

Destination Canada is pursuing a two-track approach to destination development that drives near-term success and begins the transformation for long-term growth. The first track is focused on current initiatives to stimulate revenue recovery in the immediate future

through 2025, while the long-term resilience strategy focuses on how to enable ongoing sector resilience and smart economic growth beyond recovery through 2030. Destination Canada's 2030 strategy aims to offer a nationally coherent strategy to support the sector so that it withstands future shocks, improves Canada's competitiveness, increases tourism business prosperity, enhances wellbeing in host communities, and attracts the guests that Canada wants to welcome by catalyzing smart growth through a holistic approach to ongoing tourism development.

To drive long-term prosperity and effectively become one of the most sought-after destinations on our planet, Canada must focus on two essential pillars: strategic marketing initiatives and a robust supply of distinctive experiences. Destination development and this document focuses on the latter. These elements are crucial in stimulating demand and fostering economic development within the country. By strengthening Canada's portfolio of unique and authentic product offerings, the objective is to surpass guests' expectations and deliver truly unforgettable experiences. Additionally, by actively addressing market demands and consistently introducing new experiences and high-quality products, Canada can enhance its ability to attract high-values guests (HVGs) who contribute significantly to the economic, socio-cultural, and environmental wealth of Canada's tourism sector.

METHODOLOGY

As more and more visitors prefer destinations that respect the environment, local culture, and resident communities, destination development thoughtfully preserves and grows assets in Canada for future generations. Destination Canada partnered with Resonance Consultancy to create a Destination Development Strategy that will further strengthen Canada's tourism economy and increase Canada's global competitiveness. This strategy considers current gaps and opportunities based on stakeholder interviews, engagement with partner organizations, and the independent research of global destinations leading in Destination Development. The research was conducted

on 25 countries to identify current Destination Development programs, departments, structures, projects, and initiatives across the globe that Canada could potentially gain insight and direction from. In addition, Resonance independently conducted a total of 35 interviews with DMOs, PTMOs, Government Entities, Tour Operators, and Indigenous Leaders to ensure that Destination Canada's approach to destination development is industry-informed. Resonance actively engaged with Destination Canada, ISED, and the National Destination Development Working Group to establish a collaborative, streamlined approach to destination development in Canada.



02

DESTINATION DEVELOPMENT ASSESSMENT



Middle Cove Beach

Newfoundland and Labrador



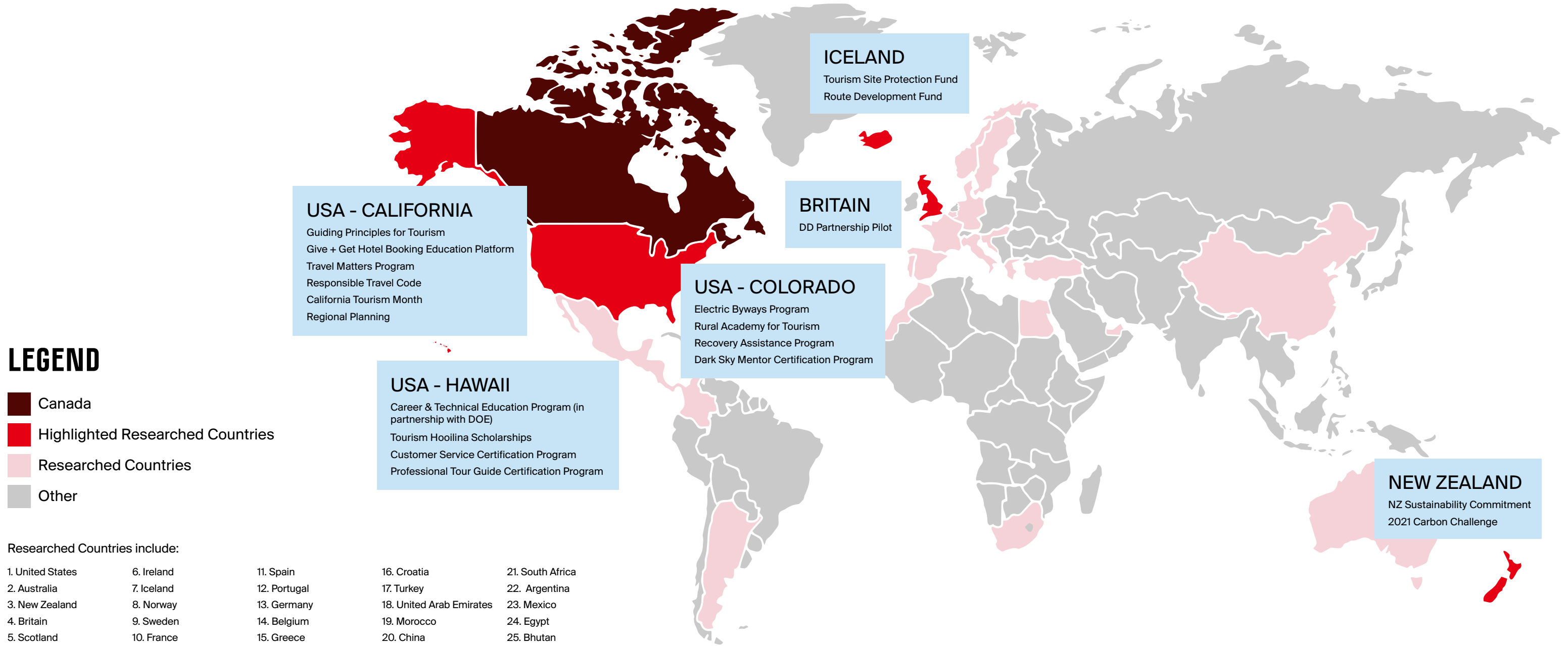
deer + almond restaurant

Winnipeg

Manitoba

GLOBAL BENCHMARKING

Resonance conducted extensive research on 25 tourism destinations across 6 continents to better understand the current destination development landscape across the globe and identify learnings and examples for Destination Canada to reference.



KEY TAKEAWAYS

Broadened Mandates

Global DMOs are redefining their mandates and evolving from marketing-focused organizations to diverse pillars, goals, and initiatives that tackle many common challenges that impact destinations' global competitiveness.

DMOs are leading their respective tourism industries in destination development by tackling widespread challenges that local entities do not have the capacity or capabilities to take on.

Sustainability

Destinations are emphasizing sustainability by prioritizing responsible travel practices and guidelines for visitors and residents alike to protect the destination's integrity, environment, and cultural fabric.

Workforce

The workforce is at the heart of destination development across the globe, with destinations implementing certification programs, hospitality training, and career education to attract and retain top talent while also ensuring a consistent visitor experience.

Regional Planning

While many countries and states have national or statewide initiatives, much of their destination development work is honed in on regional development and planning specific to each area's challenges, opportunities, and needs.





DESTINATION DEVELOPMENT IN CANADA

Stakeholders were engaged in a series of 35 interviews to gain a better understanding of nationwide and provincial challenges and opportunities related to destination development throughout Canada. Stakeholders were also asked to define destination development and share their understanding of similar terms being used globally.

Approach:

- 35 Interviews
- 25 DMOs & PTMOs
- 08 Government Entities
- 03 Tour Operators

Topics discussed:

- Destination Development Language
- National & Provincial Industry Challenges
- Destination Development Opportunities
- Destination Canada's Role in Destination Development

CURRENT CHALLENGES IN DESTINATION DEVELOPMENT

Stakeholders identified the below categories as top challenges and barriers to accelerated destination development in Canada.

Funding

Stakeholders overwhelmingly identified funding as the biggest challenge related to destination development. DMOs, Tour Operators, and Tourism Businesses have a plethora of innovative ideas to enhance accommodations and experiences within their provinces and across Canada but lack the financial capacity to bring those ideas to life and ultimately optimize the Canadian experience.

Sustainability

While Canada's adventurous reputation and plethora of authentic cultural and natural assets are a perfect fit for travellers' looking for an off-the-beaten-path experience, lack of destination readiness and infrastructure such as a variety of accommodations and culinary options hinders guests' ability to have an elevated visit.

Transportation

Stakeholders highlighted that Canada's vast size requires increased and updated transportation infrastructure to encourage visitors to venture out of the urban hubs or lengthen their stay by including more locations within Canada. Faster modes of transportation and increased affordable air access would mitigate current accessibility issues to and within Canada.

Awareness

The economic value of tourism isn't widely understood outside of the tourism stakeholder ecosystem which creates significant barriers for stakeholders in search of investment for destination development.

Unclear Definition of Destination Development

Stakeholders are using and defining the term "Destination Development" differently, resulting in siloed efforts across Canada.

* stakeholder quote

"Travel demand is there but the biggest barrier is infrastructure."*

"Biggest challenge is funding & resources"*

"Awareness of the value of our industry and what it brings to Canada is a challenge."*

“We can’t take a one-view approach to destination development across Canada, we need to engage with local communities to meet them where they’re at as it relates to their specific needs.”*

“Winter is a huge opportunity; we do winter really well. We already have a lot of great infrastructure in place but positioning them and enhancing them to make them more appealing to travellers and getting the word out there.”*

“We’re the second largest country in the world and almost all of the demand is for one percent of our land mass. There’s way too much demand for too few places.”*

FUTURE OPPORTUNITIES IN DESTINATION DEVELOPMENT

Stakeholders identified the below categories as top opportunities to strengthen Canada’s tourism industry and ultimately increase Canada’s global competitiveness.

Collaboration

There is a major opportunity to strengthen Canada’s tourism industry through cross-provincial knowledge-sharing and collaboration on development efforts. By fostering an environment of collaboration, the industry can streamline messaging and learn from similar experiences.

Community-Led Initiatives

There is an opportunity for Canada to set a global standard in destination development through community-led initiatives that are beneficial to all Canadians. Engaging with local communities on destination development will create a more tailored approach specific to each community’s needs and foster more buy-in among residents.

Authenticity

As demand soars for truly authentic travel experiences, Canada has an opportunity to showcase its multifaceted cultural fabric and untouched natural assets to the world. Advancing destination development in the context of Indigenous communities offers an opportunity for Canada to work towards Reconciliation efforts.

Dispersion

Strengthening supply across all of Canada’s provinces and in shoulder seasons will offer more diversified itineraries to travellers and more financial stability to the industry. Geographic and seasonal dispersion will enhance Canada’s economic vitality.

* stakeholder quote

STAKEHOLDER SUGGESTIONS TO ADVANCE DESTINATION DEVELOPMENT IN CANADA

Stakeholders identified the below key roles for Destination Canada that would offer maximum impact to destination development in Canada.

National-Level Thought Leader

Stakeholders are strongly looking to Destination Canada to take on a leadership role by representing Canada as a nation and uniting the sector under one definition and one set of standards for destination development. i.e developing and sharing the regenerative approach to tourism, leading the International Symposium on Destination Stewardship.

Convener

Stakeholders feel that Destination Canada can streamline and strengthen destination development efforts by providing a platform for stakeholders to connect, collaborate, and learn from (rather than recreate) local and provincial efforts. There is an opportunity for Destination Canada to equip the sector with knowledge, insights, and thought-provoking ideas by hosting a conference that brings together leading experts in destination development. i.e National Destination Development Working Group

Facilitator/Connector

Destination Canada has the opportunity to empower local entities and organizations through actively endorsing grass-roots initiatives that will funnel into collective impact for destination development in Canada.

Resourcer

There is an opportunity for Destination Canada to empower provincial and local initiatives by providing valuable data and connecting organizations with funding opportunities to bring their impactful ideas to life.

Funder

Stakeholders are in need of financial resources to implement transformative initiatives but do not always have the knowledge or connections to access funding sources. Destination Canada can greatly impact Canada's tourism industry by connecting local entities to funding opportunities.

* stakeholder quote



“DC can help provinces be more collaborative and provide a platform for people to connect and address training gaps through some sort of conference or event.”*

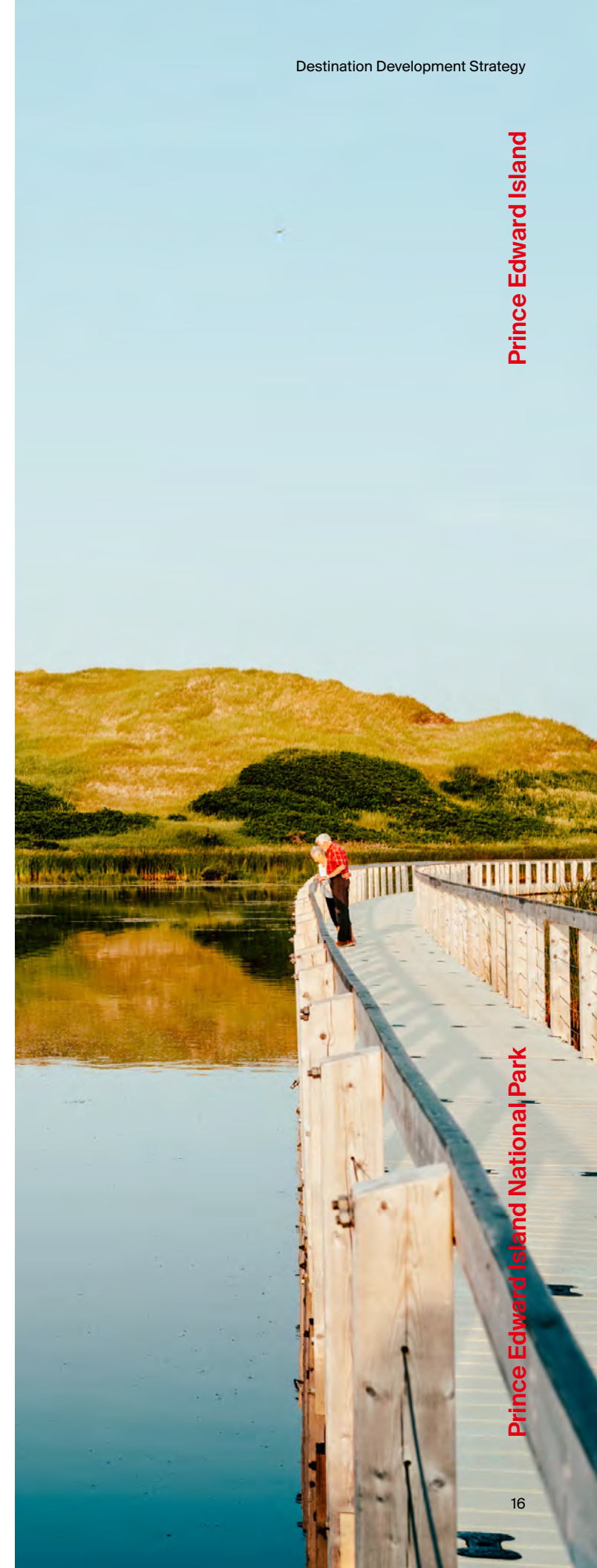
“DC represents the entire country and so they have a role to play in taking a leadership role.”*

“DC should be a facilitator. Sometimes bringing expertise, sometimes bringing money and a lot of time bringing credibility to a project.”*

STAKEHOLDER INSIGHTS

Stakeholder insights and perspectives through this comprehensive engagement process informed Destination Canada’s strategic initiatives related to destination development and the role that the organization will play for destination development in Canada (see section 4).

CHALLENGES	OPPORTUNITIES	DESTINATION CANADA’S ROLE
FUNDING	COLLABORATION	NATIONAL-LEVEL LEADER
INFRASTRUCTURE & DESTINATION READINESS	COMMUNITY-LED INITIATIVES	CONVENER
TRANSPORTATION	AUTHENTICITY	SUPPORTER/CONNECTOR
AWARENESS	DISPERSION	RESOURCER
UNCLEAR DEFINITION OF DESTINATION DEVELOPMENT		FUNDER



Prince Edward Island

Prince Edward Island National Park

03

DESTINATION CANADA'S ROLE IN DESTINATION DEVELOPMENT



Prince Edward Island National Park

Prince Edward Island



Nightjar Diner Co.

Swift Current

Saskatchewan

DESTINATION CANADA'S MANDATE

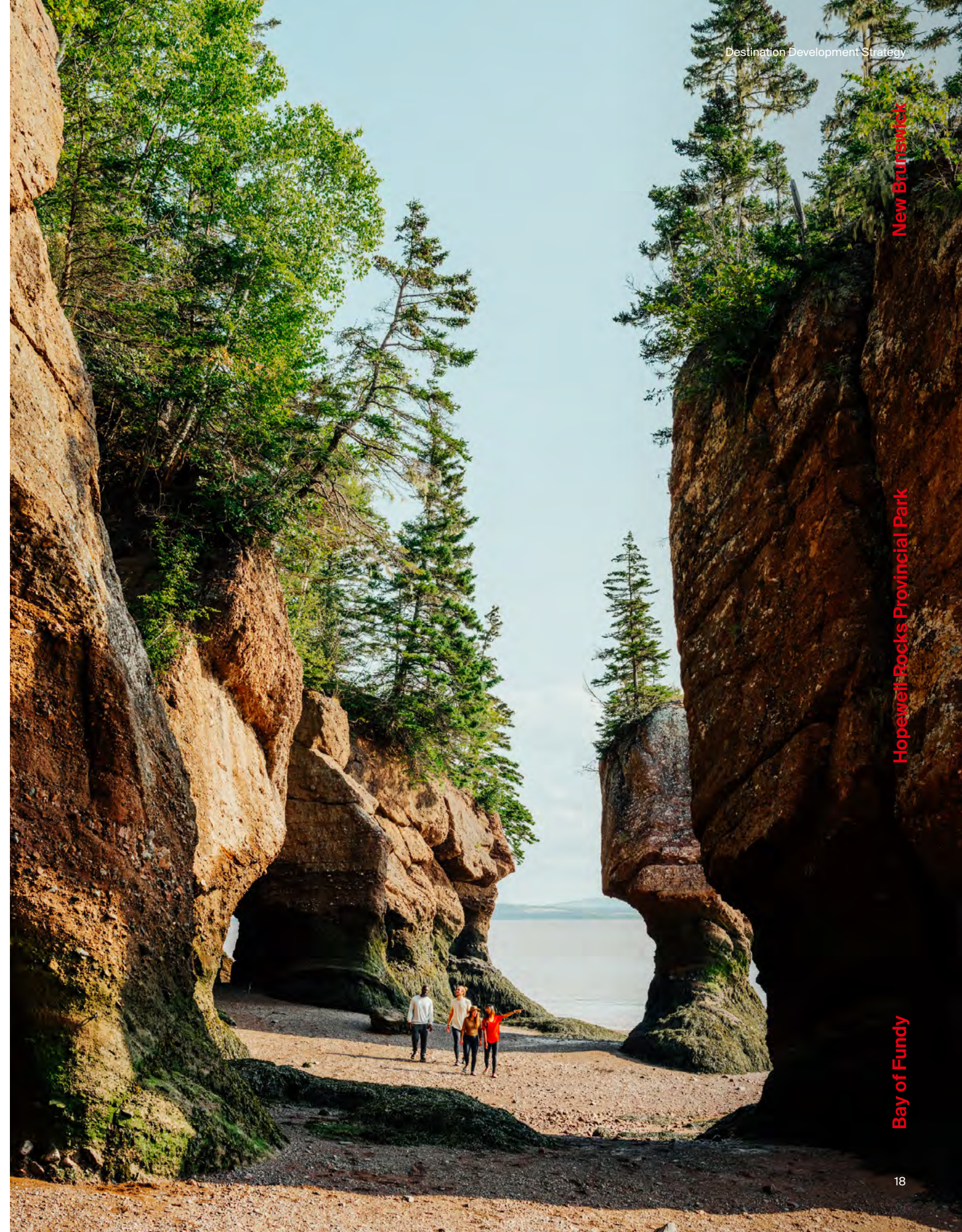
Our Aspiration: Tourism generates wealth and wellbeing for all of Canada and enriches the lives of our guests.

The Canadian Tourism Commission, known today as Destination Canada, was established in the year 2001. The Act established the need for the Commission, as follows:

- The Canadian tourism industry is vital to the social and cultural identity and integrity of Canada
- The Canadian tourism industry makes an essential contribution to the economic well-being of Canadians and to the economic objectives of the Government of Canada
- The Canadian tourism industry consists of mainly small and medium-sized businesses (SMEs) that are essential to Canada's goals for entrepreneurial development and job creation
- It is desirable to strengthen Canada's commitment to Canadian tourism by establishing a Tourism Commission that would work with the governments of the provinces and the territories and the Canadian tourism industry to promote the interests of that industry and to market Canada as a desirable tourist destination

The objectives of the Commission are to:

- Sustain a vibrant and profitable Canadian tourism industry
- Market Canada as a desirable tourist destination
- Support a cooperative relationship between the private sector and the governments of Canada, the provinces, and the territories with respect to Canadian tourism
- Provide information about Canadian tourism to the private sector and to the governments of Canada, the provinces, and the territories





New Brunswick

Pointe-du-Chêne

Shediac Bay Cruises

June 2023

DESTINATION DEVELOPMENT

To remain a globally competitive destination for high-values guests, we must offer experiences that meet the ever-changing expectations of travellers and the marketplace. We are working to have world-class constellations of thriving destinations in Canada; places that are aligned with high-values guest demand as well as the aspirations of highly engaged communities. Destination Canada's engages in destination development in two focus areas:

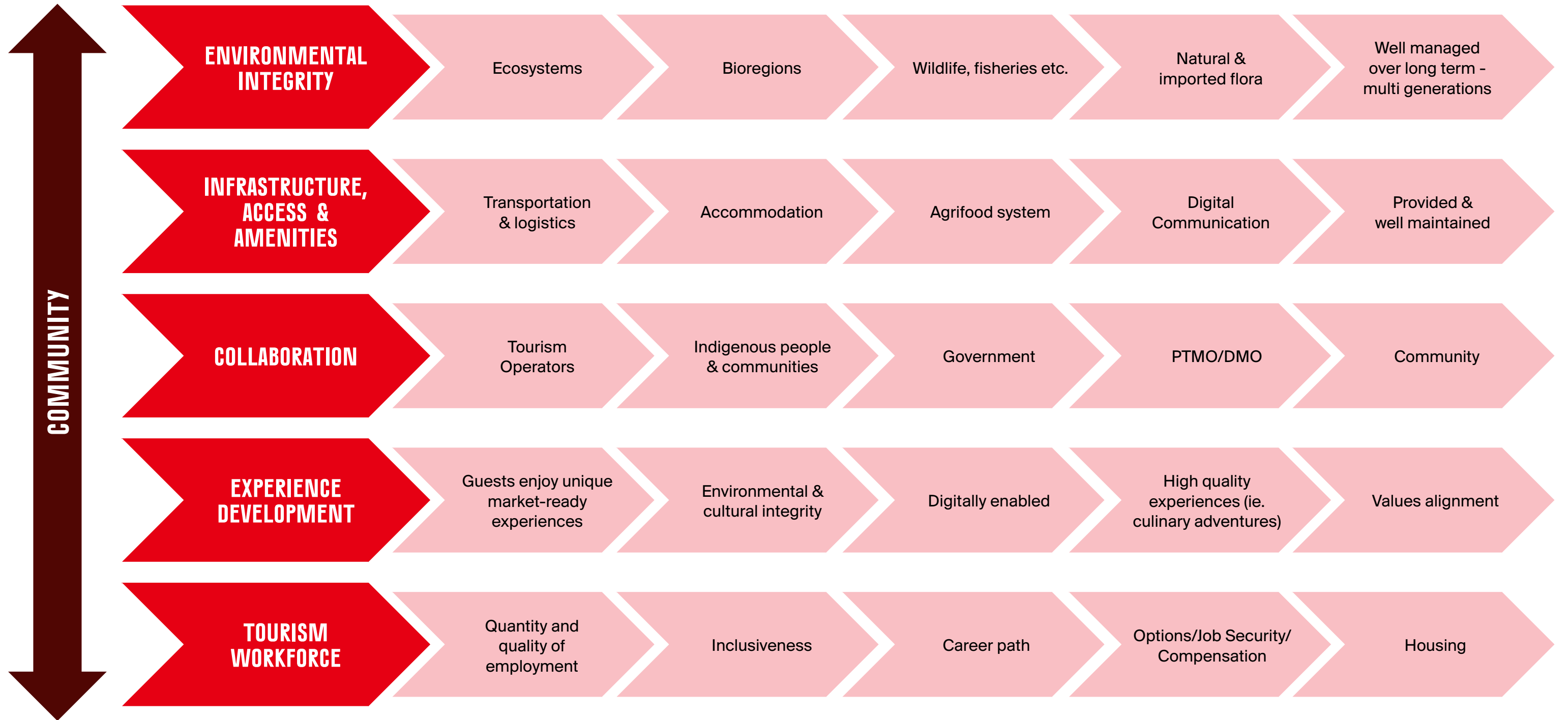
- Thought Leadership
- Planning & Strategy

Community is at the heart of a guest hosting economy, with all stakeholders playing a crucial role in showcasing the assets, culture, character, and pride that create the unique ethos of the community.

Destination development is about communities that want tourism in their place – that want it to be playful and intentional. The elements on the next page offer communities a list of essentials and considerations that need to be thought about when planning to receive guests. The elements span from environmental integrity, development and ongoing maintenance of infrastructure, access, amenities, collaboration across various stakeholders and stewards of the land, experiences, and the workforce that fortifies the delivery of it all.

This is not about transforming communities based on external preconceptions, but it is about enhancing their own attributes in a way that benefits and contributes to the economic regeneration of the host communities, using tourism as a catalyst.

ELEMENTS OF DESTINATION DEVELOPMENT



04

DESTINATION DEVELOPMENT FOCUS AREAS



CN Tower Edge Walk

Toronto

Ontario

Banff National Park

Lake Louise

Alberta





DESTINATION DEVELOPMENT FOCUS AREAS

The robust stakeholder engagement process surfaced key insights that served as the basis for recommended initiatives across the Destination Development team's two strategic lanes of engagement. These recommended initiatives combined with the Destination Development team's current work will solidify Canada's global reputation as a progressive, innovative leader in destination development.

THOUGHT LEADERSHIP

Thought Leadership is a significant part of Destination Canada's destination development work, engaging Canada's tourism industry stakeholders by providing a platform for knowledge-sharing, fostering innovation through dialogue, and providing resources and expertise. By acting as the convener, Destination Canada helps advance the industry and align destination development priorities.

Destination Canada engages Federal Family departments and agencies by providing research advice to support tourism policy and programs in 8 key areas in support of tourism economic development:

- Infrastructure
- Transportation
- Parks & Trails
- Arts, Culture, & Heritage
- Environmental Sustainability
- Labour
- Indigenous Tourism
- Digitalization



New Brunswick

Saint-Eduard-de-Kent

The Irving Eco-Centre: La Dune de Bouchouche



CURRENT INITIATIVES

National Destination Development Working Group

The mandate of the National Destination Development Working Group is contribute to thought leadership, support the creation of a destination development discipline throughout the country, share insight, knowledge, good practices, and learning. The NDDWG's purpose is to:

- Provide a forum for destination development colleagues across the country to share knowledge, challenges, and best practices.
- Bring thought leaders to speak to the group
- Establish common pillars of destination development
- Share guiding principles/framework on reconciliation and regenerative approach

Knowledge Hub Platform

The Destination Development team is creating a central repository of information known as the “knowledge hub” where definitions, case studies, progressive practices, videos, a consultant list, and other resources are available to the industry. The Indigenous Relations specialist is actively engaged in ensuring there is Indigenous content contained in this hub.

Speaker Series

Destination Canada hosts virtual sessions where experts, consultants and partners offer knowledge, insights, and expertise on a particular topic based on

the needs and interests of a community or region in Canada. The sessions are recorded and posted on the Knowledge Hub as an industry resource.

International Symposium on Destination Stewardship

Destination Canada is planning an international symposium in Canada to showcase the best of destination development and stewardship from around the world.

The International Symposium on Destination Stewardship brings together international thought leaders from tourism and other sectors to discuss, influence, and revolutionize a path forward for Tourism. The symposium will explore regenerative economics as a path for smarter long-term growth for tourism and create concrete value propositions for investment in destinations and experiences using a regenerative approach. This large-scale event will set the stage for communities and regions across Canada and abroad to implement this approach as well as highlight best practices and lessons learned by domestic and international destinations that have successfully implemented intentional destination development.

Regenerative Approach to Tourism

In the context of tourism, what is to be regenerated is the vitality of our places: of local people, businesses, community, and the complex ecologies that sustain them all. Manifesting a regenerative approach to tourism for Canada is based on the following five principles that offer ‘guides to action’ for the Destination Development team and help put Canadian values into practice:

- **Principle #1:** Understand and work at the scale of place
- **Principle #2:** Think about your place as a living ecosystem with unique potential
- **Principle #3:** Cultivate a field of relationships to support the ongoing evolution of each place
- **Principle #4:** Invite the gifts and focused contributions of individuals
- **Principle #5:** Practice stewardship within an ongoing field of co-creation.

Within the concept of regenerative approach to tourism in Canada, the Indigenous Relations specialist is actively engaged in fostering Indigenous tourism thought leadership.



Newfoundland and Labrador

Fogo Island

Fogo Island Inn

RECOMMENDED INITIATIVES

Destination Development Definition

Canada’s tourism industry currently defines destination development in many different ways, with some efforts being focused on product development while others are more in the realm of environmental sustainability. Developing a standard definition for destination development will:

- Unite the industry under a clear understanding of destination development
- Position Destination Canada to catalyze the travel and tourism industry supply-side efforts
- Streamline local and provincial efforts to have a greater national impact
- Establish Canada as a global leader in progressive and intentional destination development

¹ Canadian Values, [Canada Index of Wellbeing](#)

Stewardship Principles for Canada

More and more, destinations are establishing guidelines for residents and visitors alike to help preserve the local character and environment by living and traveling responsibly. Creating Stewardship Principles for Canada will:

- Increase integrity of place
- Set an international standard
- Guide businesses and stakeholders to better design and manage tourism destinations
- Attract visitation and investment from those most likely to align with Canadian values¹ and appreciate and respect Canada’s unique character and assets
- Encourage community involvement and emphasize community benefit

PLANNING & STRATEGY

Tourism planning is fundamental to Canada's global competitiveness as it ensures that Canada is consistent with changing market trends and proactively addresses visitor and resident needs. Through effective planning, Destination Canada will develop a targeted strategy with actionable steps that maximizes impact in destination development. Destination Canada provides reliable supply- and demand-side data for planning, identifies and nurtures public and private investment proposals, and supplies tools to support new destination development strategy development.

Destination Canada is focused on making strategic decisions rooted in robust research and tourism data that will enhance Canada's economy. Destination Canada enables existing destination development strategies in communities, clusters, and corridors and catalyze connections, strategy integration, and priority alignment.



CURRENT INITIATIVES

Roster of Investors & Consultants

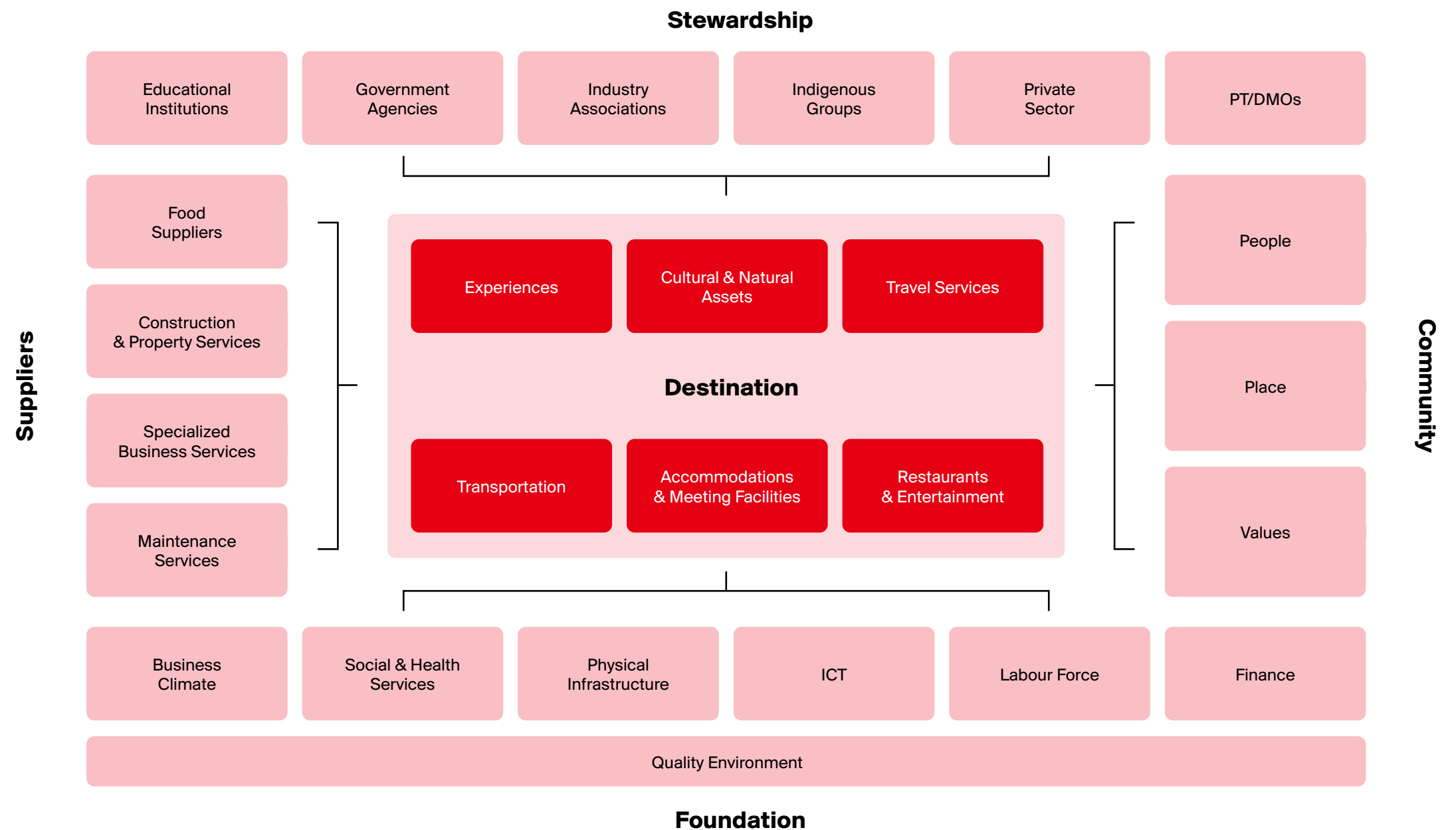
Destination Canada is curating a list of local investors and consultants to nurture destination development expertise in Canada, empower Canada's tourism industry stakeholders, and increase Canada's global competitiveness.

GIS Map (Cluster Mapping)

Destination Canada is mapping and profiling tourism clusters based on the stage of development and comparative characteristics to develop a central repository for tourism cluster data across Canada, track the evolution of tourism clusters, and support targeted investment through localized intelligence.

Destination Canada will map the location of tourism clusters by specialization (location quotient), size (total tourism employment), and growth (tourism employment growth). Through Cluster Mapping, Destination Canada will:

- Facilitate systems thinking
- Foster stakeholder collaboration and prioritization
- Improve regional competitiveness
- Attract investment
- Increase the quantity and quality of travel experiences
- Raise productivity and operational efficiency



Corridor Tourism Strategy Program

Destination Canada has evolved its approach of focusing on individual experiences for guests and instead focusing on journeys that encompass a multitude of diverse destinations and experiences that Canada has to offer. The primary goal of the Corridor Strategy Program is to accelerate destination development in corridors across Canada through comprehensive planning that stimulates investment and contributes to the wealth and wellbeing for all of Canada. Destination Canada's approach to corridor development places an emphasis on strengthening stakeholder collaboration, especially between provinces and territories, to build capacity and leadership. It is critical to understand the barriers, gaps, and opportunities for improvement and assess the factors and interventions that can enable and catalyze development. A comprehensive planning process, grounded in regenerative principles, will help bring more innovative and impactful ideas to fruition. Encouraging cross-provincial and territorial corridor development and increasing high-quality product offerings will:

- Catalyze connections, integrate strategies, and align priorities to support shared goals
- Cultivate investments and bring awareness to development opportunities across Canada
- Leverage Destination Canada's tourism intelligence and GIS cluster mapping technology
- Develop capacity to practice regenerative principles and evolve destination development
- Increase cross-provincial collaboration and empower destinations to intentionally plan and consider the collective impact
- Create a robust pipeline of innovative experiences, activities, accommodations, and concepts that could increase Canada's global competitiveness
- Increase authentic and transformational experiences that are distinctly Canadian and align with Canada's brand

With the support of Destination Canada, partners in the Corridor Strategy Program will co-create a strategy that defines the vision and aligns the resources of corridor partners and stakeholders.



RECOMMENDED INITIATIVES

Targeted Development of Fall & Winter Seasons

Focusing on targeted development efforts of the fall and winter seasons will:

- Appeal to a variety of HVGs with diverse interests
- Allow Canada to continue to grow beyond current near-term capacity constraints
- Establish Canada as a year-round destination
- Offer an elevated visitor experience through a robust supply that meets increased off-seasonal demand
- Create economic stability for small businesses and accommodations that historically struggle during off-seasons
- Embrace Canada's colder months by capitalizing on world-class, unique experiences exclusive to Canada

Continued Importance of Tourism

Tourism constitutes 2.02% of Canada's economy and has a steady impact on the quality of life of all Canadians. Accelerating awareness of the importance of tourism will:

- Inform and influence non-tourism entities about the economic and socio-cultural contribution that tourism has at the community and national level
- Educate all Canadians on the positive impacts of tourism on Canada's economy
- Secure more investment due to uncapped potential
- Create more widespread resident buy-in
- Improve the wealth & wellbeing of all Canadians
- Highlight the benefits of destination development to residents

Tourism Investment

Canada's tourism industry stakeholders have a plethora of transformative ideas but are often hindered by a lack of financial capacity. Connecting investment programs with tourism development opportunities will:

- Be a first port of entry/ concierge service of tourism investment opportunities for Canada
- Assess industry challenges in attracting capital investments
- Identify programs to connect and increase public investment in tourism assets and infrastructure.
- Build a readily available portfolio of projects/ destinations/corridors in varying phases of development that require varied amounts of funding
- Develop investment knowledge at Destination Canada and share it with partners

Tourism Business Marketplace

The tourism industry, particularly small and medium enterprises (SMEs), is witnessing a significant amount of buying and selling activity, which, if not carefully managed, could lead to the erosion and loss of valuable tourism businesses.

To mitigate these potential challenges, it is essential to conduct due diligence to assess the need for a national digital marketplace. This marketplace could serve a dual purpose: facilitating the seamless buying and selling of tourism businesses across the country while also acting as a vigilant watchdog to safeguard against the erosion of such businesses or their acquisition by non-Canadian entities.

05

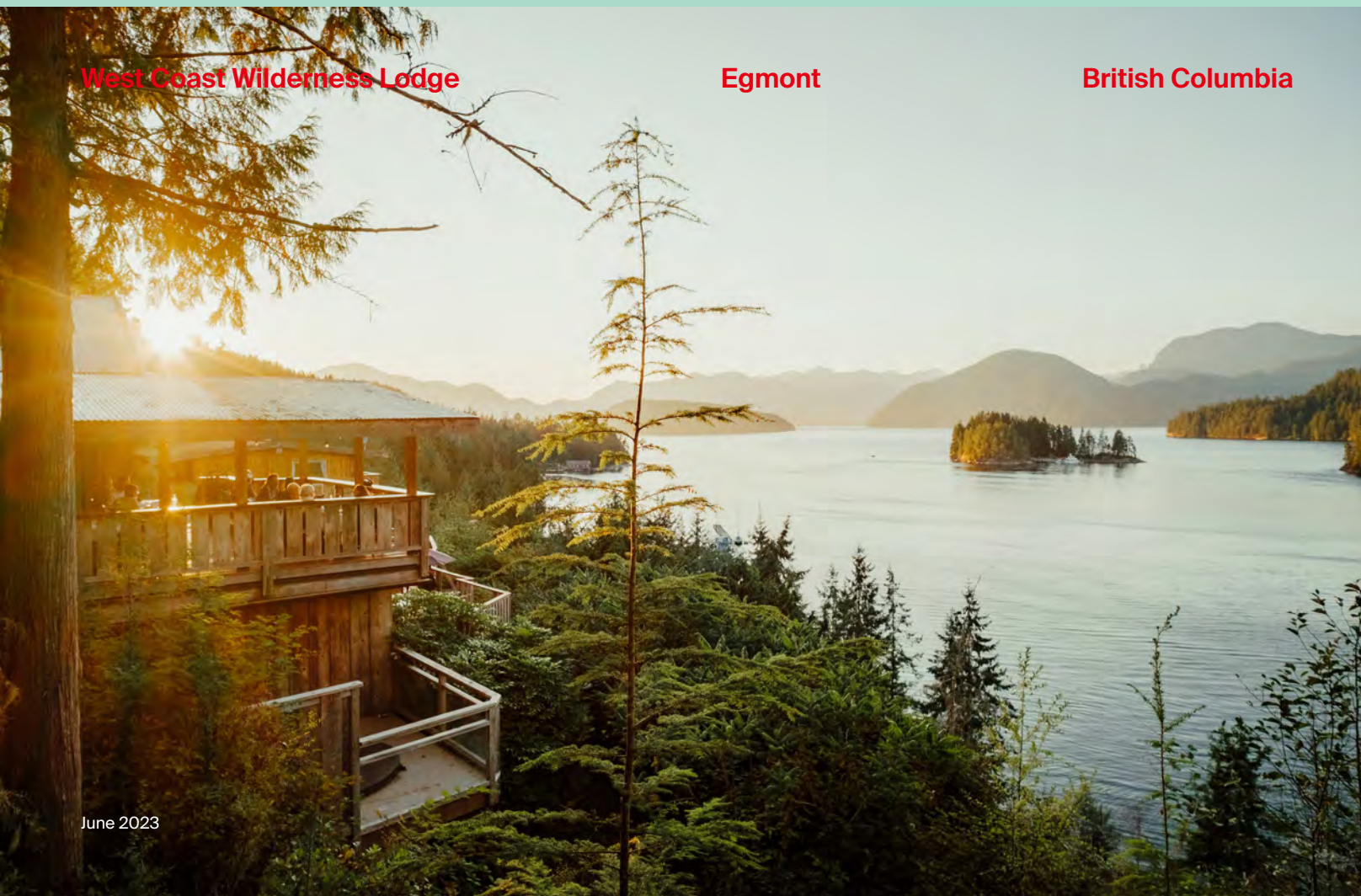
DESTINATION DEVELOPMENT ROADMAP



Grouse Mountain

North Vancouver

British Columbia



West Coast Wilderness Lodge

Egmont

British Columbia

Ontario

Toronto

Toronto Islands



DESTINATION DEVELOPMENT ROADMAP

Destination Canada will focus on the below initiatives over the course of 2023-2025 period to set a robust foundation for destination development in Canada at a local, provincial, and federal level.

THOUGHT LEADERSHIP

2023

- Speaker series
- Knowledge hub platform (launch & deployment)
- Stewardship principles development
- International Symposium on Destination Stewardship
- Regenerative Approach to Tourism
- Social return on investment
- Economic return on investment

2024

- Speaker series
- Destination development framework
- Investment environment point of view
- Transportation environment point of view
- Tourism investment business cases
- Tourism marketplace assessment

2025

- Speaker series
- Knowledge Hub platform - Improvement & iteration
- Research study of tourism communities



STRATEGY & PLANNING



2023

- National Destination Development working group
- Corridor strategy launch
- Cluster mapping pilot



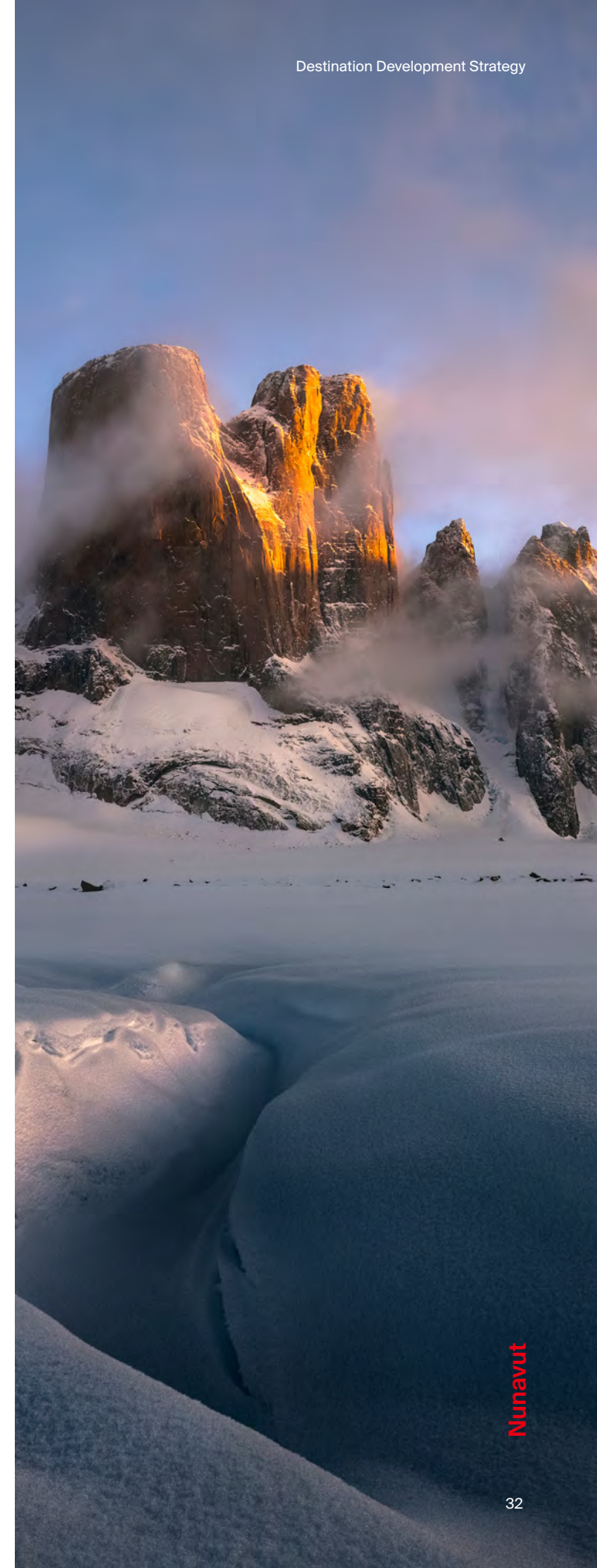
2024

- National Destination Development working group
- Corridor strategy completion
- Cluster mapping: inventory of supply by geography, by period
- Supporting Indigenous Tourism
- Roster of investors and consultants



2025

- National Destination Development working group
- Destination development capability support
- Cluster mapping: open source and integrated tool





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