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CANADA'S TOURISM ECONOMY

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Dillan Theckedath

Parliamentary Information, Education and Research Services

AUTHORSHIP

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Dillan Theckedath

Economics, Resources
and International Affairs Division

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Canada's Tourism Economy
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EXECUTIVE SUMMARY

Canada's multi-billion-dollar tourism sector employs hundreds of thousands of Canadians and is supported by all levels of government.

In 2020, due to the COVID-19 pandemic, global tourism and travel sector revenue decreased by 49% from the previous year, to US\$4.7 trillion. Global tourism employment fell by 19% to 272 million jobs. Similarly, the Canadian sector earned \$49.5 billion in 2020, a decline of 40% from 2019, while domestic employment fell to 1.6 million direct and indirect jobs, a decrease of 24%. About 28% of Canadian tourism revenue is generated from inbound visits.

In 2019, Canadians made 37.8 million foreign trips consisting mainly of 27.1 million visits to the United States. Additionally, Canadians made 10.7 million trips to other countries, most frequently Mexico (1.8 million), Cuba (964,000), the United Kingdom (770,000), China (666,000) and Italy (619,000).

According to the World Economic Forum's *Travel & Tourism Competitiveness Report 2019*, which ranks the most competitive countries for travel and tourism, Canada ranked ninth out of 140 countries studied, down from eighth place in 2013. Canada ranked first in several sub-categories, such as safety and security, environmental sustainability and air transport infrastructure. Conversely, Canada was found to be deficient in several areas, including price competitiveness and international openness.

Other studies have found that tourism demand is concentrated in Canada's largest cities, with Toronto, Vancouver and Montréal accounting for 75% of overall visitors and most of this activity taking place during the summer months. There are also challenges stemming from labour shortages, a lack of investment and promotion, and a lack of coordination of tourism policy between all levels of government.

Destination Canada (formerly the Canadian Tourism Commission) is a federal Crown corporation responsible for national tourism marketing and is governed by the *Canadian Tourism Commission Act*. In 2019, the federal government announced *Creating Middle Class Jobs: A Federal Tourism Growth Strategy*, which is based on the following three pillars: building tourism in Canada's communities; attracting investment to the visitor economy; and renewing the focus on public-private collaboration.

Between 2008 and 2020, the federal government invested approximately \$1 billion in the tourism industry. In 2021, it announced another \$1 billion in funding, including the Tourism Relief Fund.

If international borders continue to reopen and the industry continues its steady overall growth of the recent years prior to the pandemic, it will again contribute to Canada's economic well-being. And although the United States continues to be Canada's biggest tourism trading partner, stakeholders might continue their efforts of focusing on more growth-oriented, lucrative emerging markets to better diversify tourism interests to help Canada fulfil its tourism potential.

CANADA'S TOURISM ECONOMY

1 INTRODUCTION

Canada's tourism industry is an important contributor to Canadian economic growth. This industry – which comprises hospitality and travel services to and from Canada – is a multi-billion-dollar business that employs hundreds of thousands of Canadians and is supported by all levels of government. This HillStudy provides information about Canada's tourism industry, travel patterns of visitors to and from Canada, the importance of the United States (U.S.) to Canada's tourism economy and the role of the federal government.

The global tourism sector suffered substantial declines in activity due to the COVID-19 pandemic. Since this HillStudy incorporates data from 2019 and 2020, special attention should be paid to both explicit tourism figures and relative comparisons to previous years due to the extraordinary effects of the pandemic.

2 GLOBAL TRAVEL AND TOURISM

According to the Tourism Industry Association of Canada, “travel and tourism” includes “transportation, accommodations, food and beverage, meetings and events, and attractions,” such as festivals, historical/cultural institutions, theme parks and nature settings.¹

The World Travel & Tourism Council's latest annual research explains the COVID-19 pandemic's impact on the global travel and tourism sector:

- The sector suffered a loss of almost US\$4.5 trillion in revenues worldwide, standing at US\$4.7 trillion in 2020.
- In 2019, the sector contributed 10.4% to the global gross domestic product (GDP); this decreased to 5.5% in 2020 due to ongoing mobility restrictions.
- In 2020, 62 million jobs were lost, representing a drop of 18.5% of global sectoral employment, leaving just 272 million employed compared to 334 million in 2019.
- Globally, domestic visitor spending decreased by 45% and international visitor spending declined by 69.4%.²

3 THE CANADIAN TOURISM INDUSTRY: FACTS AND FIGURES

3.1 GENERAL

Only about 28% of Canadian tourism revenue (about \$21.3 billion) is generated from inbound visits. The remainder represents domestic spending – i.e., what Canadians spend on domestic and foreign tourism activities. Table 1 provides further information about the industry's recent performance.

Table 1 – Selected Data on the Canadian Tourism Economy

Category	2019	2020	Change (%)
Domestic spending	\$82 billion	\$49.5 billion	-40%
International spending	\$21.3 billion	\$4 billion	-81%
Jobs directly supported by tourism	748,000	533,000	-29%
Total tourism employment	2.1 million	1.6 million	-24%
Number of tourism establishments	232,000	Not available	Not available
Tourism GDP	\$43.7 billion	\$22 billion	-50%
Tourism's share of Canada's GDP	2.02%	1.06%	-48%

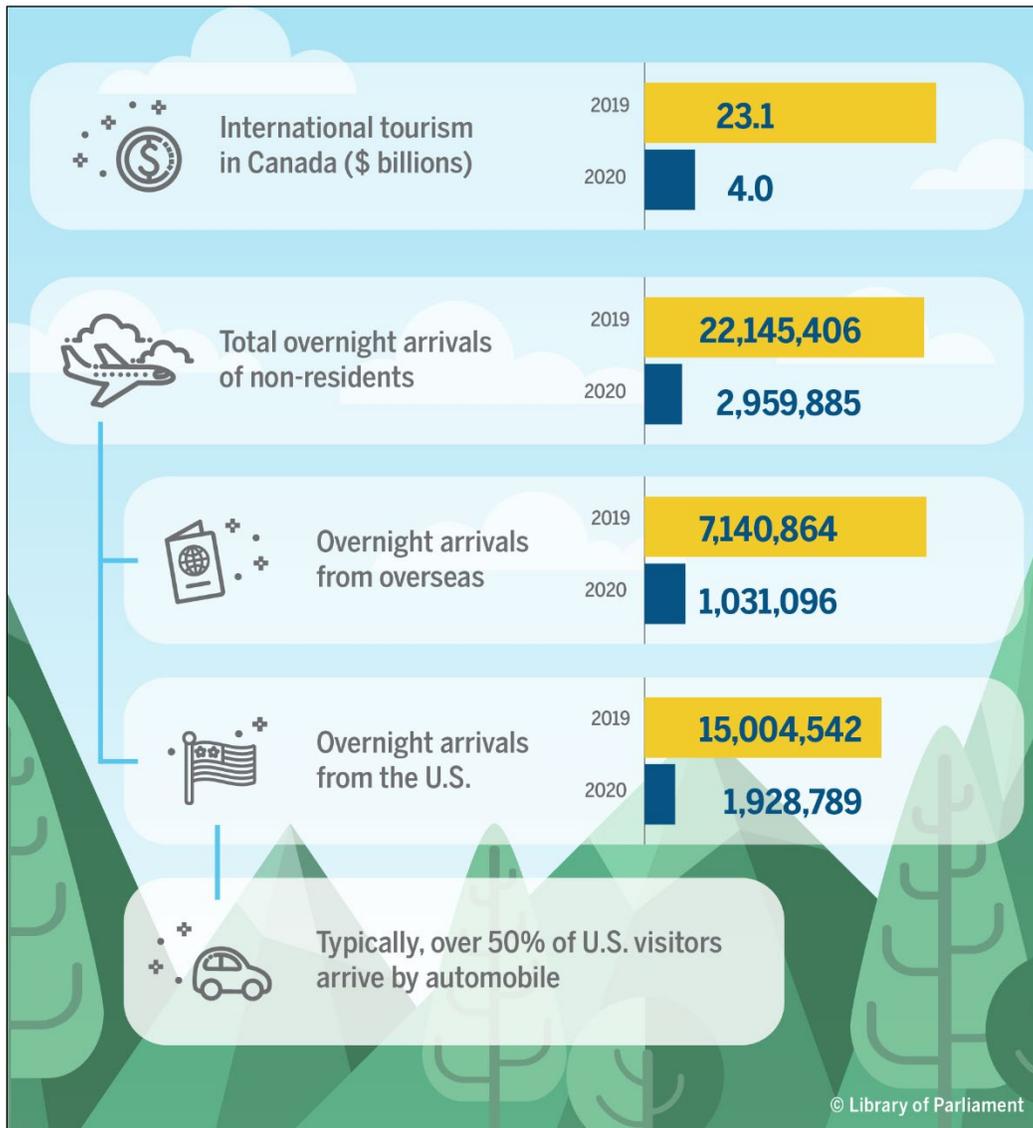
Note: Domestic spending includes spending while on a trip in Canada, spending on airfares with Canadian carriers on outbound trips and spending on tourism-related goods, e.g., camping equipment. International spending includes spending while on a trip in Canada but excludes any pre-trip purchases. GDP refers to gross domestic product.

Source: Table prepared by the Library of Parliament using data obtained from Destination Canada, [Canada Tourism Fact Sheet 2020](#).

There are two ways to categorize jobs in tourism:

- 1) Jobs in tourism-dependent industries – the total number of jobs in industries where a significant portion of the revenue is in tourism; this includes accommodation, passenger transportation, food and beverage, entertainment and recreation, and travel services.
- 2) Jobs directly supported by tourism – the share of jobs in the economy servicing visitors as opposed to local clients. These are jobs that would not exist without visitors; e.g., in food and beverage, a certain portion caters to local clients, and the portion that caters to visitors is captured in this number.

Figure 1 provides further details about international arrivals to Canada.

Figure 1 – Selected Information on International Arrivals to Canada

Source: Figure prepared by the Library of Parliament using data obtained from Destination Canada, [Canada Tourism Fact Sheet 2020](#).

According to Destination Canada, prior to the pandemic, Canada benefited from the fact that the tourism sector was booming globally. Since 2000, tourism has been growing approximately three to four times faster than the global population and about 1.5 times faster than the overall global GDP. Furthermore, notwithstanding the COVID-19 pandemic, this was expected to continue into the mid-2020s. In fact, 2017's travel and tourism sector growth of 4.6% exceeded the global GDP growth rate of 3.7%; that is, for the seventh successive year, the sector outpaced global GDP growth, which itself had the strongest growth a decade.³

However, even with this strong performance, Canada's tourism industry potential remains significantly underdeveloped. Specifically, even though it has outpaced global population and GDP growth, Canadian tourism growth has lagged behind global tourism growth for several years (see section 3.6 of this Hill Study).⁴

Moreover, tourism represents a much smaller fraction of Canada's exports when compared to peer countries such as the U.S., Japan, the United Kingdom and Australia. Studies suggest there is an opportunity for Canada to more than double its international arrivals and associated revenues by 2030.⁵ This could be achieved, in part, by capitalizing on "substantial opportunities to increase the number of tourists to Canada from the United Kingdom, China, France, Germany and Australia."⁶

Beyond its role in helping to create revenue and both direct and indirect jobs in the Canadian tourism industry, the efficient promotion of tourism can be seen as a valuable investment in Canada's overall economy. A 2013 Deloitte study has shown that "a rise in business or leisure travel between countries can be linked to subsequent increases in export volumes to the visitors' countries."⁷

3.2 KEY DETAILS FOR 2019

In 2019, the Canadian tourism sector had its best year on record, reaching 22.1 million international overnight arrivals, a 4.8% increase over the previous year. Similar to other years, the vast majority (67.7%) came from the U.S.; the top three non-U.S. sources of visitors were the U.K. (875,632), China (715,474) and France (668,490).⁸

Destination Canada reported that "air and sea arrivals from the Europe region were mostly on par with 2018 levels, with the exception of France, which led the region (+7.0%)."⁹ However, there were mixed results from the Asia-Pacific region as the biggest decline came from the region's largest market, China (-9.1% in air and sea arrivals), with smaller downward trends from Japan (-1.9%) and Australia (-0.4%). More positively, air and sea arrivals from South Korea were slightly ahead of 2018 levels, while India led the region in year-over-year growth (+9.1%).¹⁰

In North America, the U.S. provided an increase in arrivals on overnight trips entering Canada by air and auto of 6.4%. Mexico was the only one of Destination Canada's long-haul markets to record double-digit year-over-year growth in overnight arrivals by air and sea (12.3%) in 2019.¹¹

Canada's rising popularity among Chinese travellers is particularly noteworthy, as China is now Canada's second-largest overseas tourism source after the U.K.¹² This is partly attributable to Canada's having been granted Approved Destination Status by the Chinese government. In 2018, Canada welcomed a record 737,000 Chinese tourists, "surpassing the 700K mark for the first time and doubling

the number of annual travellers since 2013, with an average annual growth rate of 16%.”¹³ Travelling mainly during July and August, “Chinese tourists spend on average about \$2,850 per trip to Canada, staying for around 30 nights.”¹⁴

3.3 TRAVEL BY CANADIANS

In 2019, Canadians made 37.8 million foreign trips consisting mainly of 27.1 million visits to the U.S. Although travel to the U.S. declined by 2.3% in 2019 compared to 2018, Canadians “spent \$21.1 billion on their trips to the United States in 2019, up 4.8% from a year earlier.”¹⁵

Additionally, Canadians made 10.7 million trips to other countries, the most common of which were Mexico (1.8 million), Cuba (964,000), the U.K. (770,000), China (666,000) and Italy (619,000).¹⁶

Canadians also enjoy travelling within the country, making 275 million domestic trips in 2019, down 1.0% from 2018. Spending on trips within Canada declined 0.3% year over year to \$45.9 billion.¹⁷ The top locations were Ontario (116.5 million visits), Quebec (56.9 million visits), British Columbia (34.2 million) and Alberta (32.4 million); this includes both intra and inter-provincial/territorial domestic travel.¹⁸

3.4 INDIGENOUS TOURISM

Canada’s Indigenous tourism sector is diverse and comprises different business models. Although its key drivers of employment and GDP come from air transportation and resort casinos, “it is the cultural workers, such as Elders and knowledge keepers, who define many of the authentic Indigenous cultural experiences available to tourists in Canada.”¹⁹ Moreover, when compared with Indigenous tourism enterprises without a cultural focus, those involved in cultural tourism rely more on visitors from foreign markets as part of their customer base.

Prior to the pandemic, Canada’s Indigenous tourism sector had been rapidly outpacing overall Canadian tourism activity. Specifically, the Indigenous tourism sector’s GDP rose 23.2% between 2014 and 2017, reaching \$1.7 billion.²⁰

Lastly, Indigenous tourism businesses cite access to financing as well as marketing support and training as some of the main barriers to growth.²¹

3.5 CANADA–UNITED STATES TOURISM

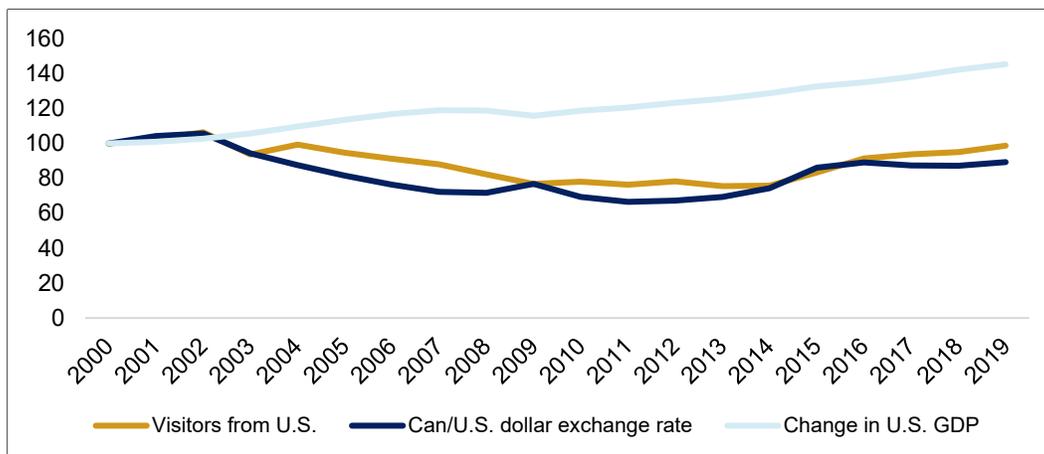
Given its proximity and long shared border, the U.S. is by far the biggest source of Canada's tourism visitors: in 2018, about two-thirds of all foreign visitors were Americans, 57% of whom arrived by automobile.²² The U.S. is also the most visited foreign destination by Canadians.

U.S. arrivals to Canada reached 14.44 million in 2018, up 1% over 2017 and the highest level recorded since 2004. American tourists like to take advantage of their long weekends for travel, with Memorial Day (the last Monday in May), Independence Day (4 July) and Labour Day (the first Monday in September) contributing to the largest weekend spikes in road arrivals in 2018.²³

Americans spend around \$700 per trip to Canada, staying an average of five nights. In 2018, they preferred mainly nature-based activities, including natural attractions, hiking or walking in nature, and viewing wildlife.²⁴

As shown in Figure 2, analysis of various factors over a 20-year period shows that the number of Americans travelling to Canada relates more to the Canadian/U.S. dollar exchange rate than to changes in the U.S. GDP.

Figure 2 – Index Comparing the Number of U.S. Visits to Canada, the Canadian/U.S. Dollar Exchange Rate and the Change in the U.S. Gross Domestic Product (GDP), 2000–2019 (2000 = 100)



Sources: Figure prepared by the Library of Parliament using data obtained from Statistics Canada, "[Chart 1: Tourists to Canada from abroad, annual](#)," *The Daily*, 20 February 2020; Federal Reserve Bank of St. Louis, "[Canadian Dollars to U.S. Dollar Spot Exchange Rate](#)," FRED, Database, accessed 20 August 2021; and World Bank, "[GDP \(constant 2010 US\\$\) – United States](#)," Database, accessed 20 August 2021.

3.6 INTERNATIONAL COMPETITIVENESS

According to the World Economic Forum's *Travel & Tourism Competitiveness Report 2019*, Canada ranked ninth out of 140 countries studied, down from eighth place in 2013.²⁵ Canada was ranked first in several sub-categories, such as safety and security, environmental sustainability and air transport infrastructure.

In contrast, Canada was found to be deficient in several areas, such as price competitiveness and international openness (e.g., visa requirements, air service agreements).

A 2018 report further indicated the following challenges facing the Canadian tourism sector:

- **CONCENTRATED DEMAND** – Toronto, Vancouver and Montréal (Canada's three largest cities) account for 75% of all visitors, and most of this activity takes place during the summer months. Plus, 70% of visitors to Canada come from the U.S., making the sector very vulnerable to the vagaries of the American economy.
- **ACCESS** – Coming to (and travelling within) Canada can be expensive, difficult and time-consuming; this is true for travel both inter-regionally (e.g., visiting a national park from a large city) and within urban centres.
- **LABOUR SHORTAGES** – Similar to many sectors that service the public, the tourism industry has been facing labour shortages for some time. In fact, this sector "could face a shortage of 120,000 people by the mid-2020s, and up to 230,000 people by 2030."
- **LACK OF INVESTMENT/PROMOTION** – As hotels face up to 95% occupancy during the summer months, there are insufficient room-nights for additional large-attendance events such as conventions, conferences and festivals. Also, compared to peer countries, Canada spends less on marketing and promotion per international tourist arrival (in some cases up to 20% less). One of the contributing factors is that most tourism businesses are small enterprises that face difficulties in securing capital.
- **GOVERNANCE** – Given that the sector is extremely diverse and made up of many destinations in different regions, successful efforts for one region or operator will not necessarily carry over to other parts of the country or service providers. Also, as tourism policies and programs are spread across numerous organizations within every level of government, making a well-coordinated and integrated Canadian approach is difficult.²⁶

These assessments suggest that even though Canada is doing well in certain areas, other jurisdictions may be greatly improving their ability to attract international tourism. Changing trends in consumer preferences may also play a role in determining which destinations may be more popular than others at any particular time.

4 THE ROLE OF THE FEDERAL GOVERNMENT

4.1 DESTINATION CANADA

Destination Canada is a federal Crown corporation responsible for national tourism marketing and is governed by the *Canadian Tourism Commission Act*. It targets the following markets “where Canada’s tourism brand leads and yields the highest return on investment”: Australia, Canada, China, France, Germany, Japan, Mexico, the U.K. and the U.S.²⁷

4.2 FEDERAL TOURISM STRATEGY

In 2019, the federal government announced its new tourism strategy entitled *Creating Middle Class Jobs: A Federal Tourism Growth Strategy*. It is based on the following three pillars:

- BUILDING TOURISM IN CANADA’S COMMUNITIES – expand from the concentration of international visitors to Canada’s three largest cities over a few (mostly summer) months by helping communities “exploit and develop the characteristics that make them special. In so doing, they will be better able to convince tourists to get off the beaten path, explore the lesser-known parts of the country, and to visit during the off-peak seasons.”
- ATTRACTING INVESTMENT TO THE VISITOR ECONOMY – to combat the lack of investment in Canada’s tourism sector, the strategy aims to improve coordination among jurisdictions and help attract private investment by establishing “Tourism Investment Groups in every region of Canada to enable the development of impactful tourism projects, including large-scale destination projects.”
- RENEWING THE FOCUS ON PUBLIC–PRIVATE COLLABORATION – with the establishment of the Economic Strategy Table for Tourism, the federal government aims to stimulate and sustain growth in Canada’s tourism sector by working collaboratively with industry to ensure that tourism is on the front lines of economic policy making. This could include addressing “the high cost of travelling to and within Canada, labour shortages and the lack of investment. It could also look at competitiveness, sustainability, the sharing economy and digital platforms.”²⁸

Part of the focus on improving tourism has been improving accessibility. To that end, in 2018, the Government of Canada introduced Bill C-81, the *Accessible Canada Act*, which “aims to achieve a barrier-free Canada through the proactive identification, removal, and prevention of barriers to accessibility in all areas under federal jurisdiction, including transportation services such as air and rail.”²⁹ The bill received Royal Assent in 2019.

4.3 FEDERAL FUNDING INITIATIVES

4.3.1 2008–2013

In 2008–2009, the federal government invested over \$500 million in the tourism industry to develop facilities and events, and to promote tourism. This is in addition to investments in other areas that affect tourism, such as improvements for Parks Canada and border services.³⁰ In 2013, funding of \$42 million was allocated to improve visa services,³¹ an area where Canada has been found to be deficient.

4.3.2 2016–2017

Since 2016, the regional development agencies have allocated over \$196 million to tourism businesses, and the Business Development Bank of Canada has provided more than \$1.4 billion in financing. Export Development Canada assists Canadian tourism businesses that aim to expand into global markets.³² Budget 2017 provided Destination Canada with permanent funding of \$95.5 million per year for tourism-related work, up from \$58 million.³³

4.3.3 2019

Budget 2019 announced that starting in 2019–2020, \$58.5 million over two years would go towards the creation of a Canadian Experiences Fund. The Fund supports “Canadian businesses and organizations seeking to create, improve or expand tourism-related infrastructure—such as accommodations or local attractions—or new tourism products or experiences.” These investments would focus on tourism in rural and remote communities, Indigenous tourism, winter tourism, inclusiveness (especially for the LGBTQ2 communities) and farm-to-table/culinary tourism.³⁴

Additionally, Budget 2019 included \$5 million to Destination Canada for a “tourism marketing campaign that will help Canadians to discover lesser-known areas, hidden national gems and new experiences across the country.”³⁵

Budget 2019 also included the establishment of the Economic Strategy Table dedicated to tourism, which will bring together “government and industry leaders to identify economic opportunities and help guide the Government in its efforts to provide relevant and effective programs for Canada’s innovators.”³⁶

4.3.4 2021

Announced in Budget 2021, the Tourism Relief Fund is a \$500 million national program that is part of a \$1-billion package to support the Canadian tourism sector.³⁷ Its goal is to position Canada as a destination of choice when domestic and international travel is once again deemed safe (i.e., post-pandemic) by:

- empowering tourism businesses to create new or enhance existing tourism experiences and products to attract more local and domestic visitors; and
- helping the sector reposition itself to welcome international visitors by providing the best Canadian tourism experiences to the world.³⁸

Initiatives under this fund will help tourism businesses and organizations adapt their operations to meet public health requirements; improve their products and services; and position themselves for post-pandemic economic recovery.³⁹

Part of this funding includes Destination Canada's \$2-million investment along with \$950,000 of in-kind support to the Indigenous Tourism Association of Canada to "support the recovery of Indigenous tourism businesses."⁴⁰

4.4 OTHER GOVERNMENT PLAYERS

Several federal government institutions also play key roles in shaping the outcome of Canada's tourism economy. For example, the federal government is responsible for the following:

- airports;
- establishing ticket taxes and travel tariffs;
- providing customs and border services; and
- addressing matters related to national security.

The National Capital Commission and Parks Canada also help ensure that iconic Canadian places are protected and preserved for current and future visitors to enjoy. As well, provincial and territorial governments help develop and promote tourism in Canada.

5 LOOKING AHEAD

The Canadian tourism industry was greatly affected by the global COVID-19 pandemic. However, if international borders continue to reopen and if the industry continues its steady overall growth of the recent years prior to the pandemic, tourism will again contribute to Canada's economic well-being. And although the U.S. continues to be Canada's biggest tourism trading partner, stakeholders might continue their efforts of focusing on more growth-oriented, lucrative emerging markets to better diversify tourism interests and help Canada fulfil its tourism potential.

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