

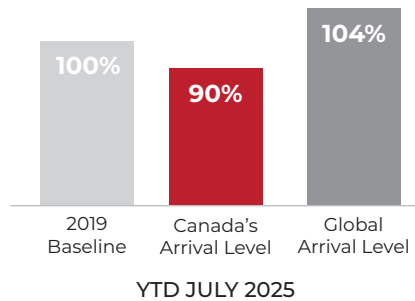
# GLOBAL COMPETITIVENESS

International tourism markets matter more than ever.

## KEY ISSUE

Domestically, Canada had a strong summer, but our global share of international visitors is slipping.

International Arrivals vs. 2019 Benchmark



## TOURISM IS ONE OF CANADA'S STRONGEST EXPORT SECTORS

**\$1.7T**

Global Tourism Exports in 2023

Source: WTTC

**\$31B**

Canada's 2<sup>nd</sup> Largest Service Export

Source: DC 2024 Value of Tourism

## INTERNATIONAL TRAVELLERS

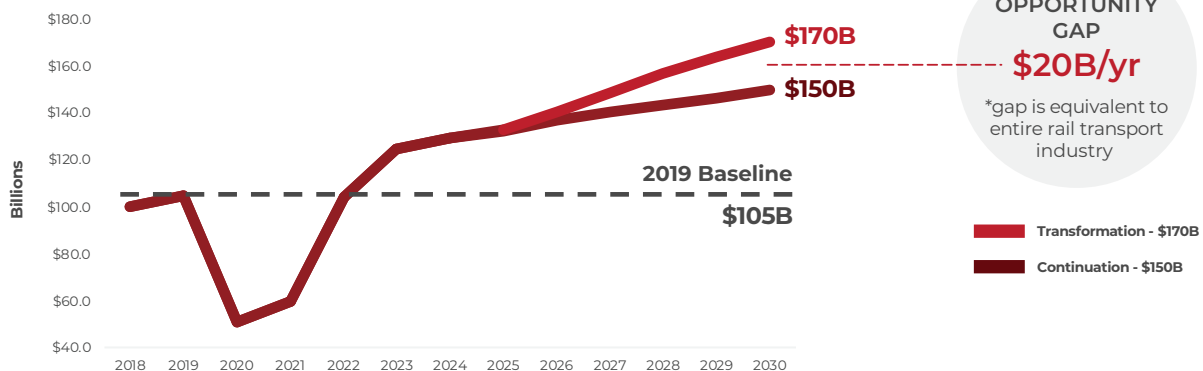
Spend 5x MORE  
Stay 6x LONGER  
than domestic travellers

Source: Statistics Canada - National Travel Survey and Visitor Travel Survey, first quarter 2025

## THE OPPORTUNITY GAP

Unlocking \$20B annually by 2030 with international marketing, supply, and workforce

Tourism Spending in Canada (2018 – 2030)



Source: Destination Canada

# GLOBAL COMPETITIVENESS

Business Events Drive High-Value Guests and Year-Round Stays.

## KEY ISSUE

Business Events have been slow to return post-pandemic.



## INTERNATIONAL CONVENTION AND ATTRACTION FUND (ICAF)

ICAF, administered by Destination Canada, supports bids for major international conferences tied to Canada's key economic sectors:

- **\$17:1 ROI**
- **73 events secured**
- **223K overnight delegates**
- **\$571.2M direct economic impact**

## RECOMMENDATION

Develop and support a competitive international marketing strategy led by Destination Canada by:

- Renewing and making permanent the current investment of \$20 million per year for the highly impactful International Convention Attraction Fund (ICAF).
- Supporting Destination Canada's budget to better compete for international visitors to Canada.

## OUTCOME

Invest in Destination Canada (DC) marketing campaigns to attract leisure and business travellers.

### RETURN ON INVESTMENT

ICAF Program \$17:1

TOTAL DC Budget \$11.77:1

**ECONOMIC IMPACT FOR EVERY \$1.00 INVESTED IN DC \$23.85**

Source: The Value of Travel and Tourism in Canada, DC



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