

FEDERAL CONTRIBUTIONS TO CANADIAN TOURISM

A REVIEW OF FEDERAL EXPENDITURES FOR FISCAL YEAR 2005 / 2006

JULY 2007



This report was prepared for Industry Canada in cooperation with the following federal departments and agencies: Aboriginal Business Canada, Agriculture and Agri-Food Canada, Atlantic Canada Opportunity Agency, Business Development Bank of Canada, Canada Economic Development for Quebec Regions, Canadian Heritage, Canadian Tourism Commission, Federal Economic Development Initiative in Northern Ontario, Human Resources and Social Development Canada, Indian and Northern Affairs Canada, Infrastructure Canada and Transport Canada, National Capital Commission, Parks Canada, Statistics Canada, Western Economic Diversification

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EXECUTIVE SUMMARY

In 2005 / 2006 FY, the federal government spent over \$400 million on various programs, projects, and activities that directly impacted tourism. These direct tourism expenditures consisted of:

- Visitor services and experiences (attractions, events, and direct visitor contact)
- Acquisition of assets, capital investment, and various other business development expenses directly related to tourism
- Human resource development specific to tourism
- Tourism-specific regional-development programs
- Tourism marketing and research
- Tourism infrastructure

A further \$300 million were found to indirectly impact tourism, including:

- Expenditures for programs that were deemed to be primarily for local residents or to support local artistic/cultural groups.
- Operational expenditures for organizations involved only tangentially with tourism, such as economic development agencies that operate programs that build management capacity of small and medium-sized enterprises.

Overall Federal Government Tourism Expenditures Fiscal Year 2005/2006:

| Category of Expenditures | Amounts FY 2005 - 2006 |
|---|------------------------|
| Direct tourism expenditures/approvals | \$407.6 million |
| Indirect tourism expenditures/approvals | \$308.1 million |

Of the reported expenditures directly impacting tourism, many reflect the federal government's achievements towards addressing the six priorities of the National Tourism Strategy (NTS). The following chart itemizes these expenditures totalling \$407.6 million along with the corresponding NTS priority.

Direct Federal Government Expenditures by NTS Priority Fiscal Year 2005/2006:

| Priority | Amounts FY 2005 - 2006 |
|------------------------------------|------------------------|
| 1. Product Development | \$287.5 million |
| 2. Human Resources | \$6.1 million |
| Tourism Information and Statistics | \$13.3 million |
| 4. Tourism Marketing | \$100.7 million |
| Total | \$407.6 million |

In addition to the expenditures that directly and indirectly impact tourism, the federal government invested in excess of \$700 million in common use such as **border crossing** and **transportation infrastructure**. While this infrastructure is necessary to tourism, these investments are motivated by other considerations.

INTRODUCTION

In the 2005 / 2006 Fiscal year, the federal government spent over \$400 million on programs, projects, and activities that had a direct, positive impact on tourism. The government spent another \$300 million that had indirect, positive impact on tourism.

This report provides an overview of federal investment in tourism in each of the six priorities of the National Tourism Strategy. These six priorities and their goals are:

| Priority | Goal |
|---|--|
| Accessible Destination - Border Crossing | To ensure the efficient flow of visitors to and from Canada |
| Accessible Destination – Transportation | To implement transportation policies and programs that reflect national, provincial/territorial, and region tourism economic benefits |
| Exceptional Experiences - Product Development | To ensure existing products are enhanced and new products are developed to take advantage of emerging opportunities |
| Exceptional Hosts - Human Resources | To ensure the supply of tourism and hospitality labour is consistent with the demand for that labour |
| Exceptional Reputation - Tourism Information and Statistics | To improve access by governments, business, and stakeholders to relevant information and analysis for decision-making and to improve the measurement of tourism's performance and its contributions to the economy |
| Exceptional Reputation - Tourism Marketing | To better harmonize and co-ordinate marketing activities between the CTC and provinces/territories, and to optimize use of existing resources through increased inter-governmental collaboration |

FEDERAL SUPPORT OF TOURISM

Federal support of tourism is broad and deep. Twelve federal departments and agencies make expenditures directly supporting the tourism sector, and eight departments and agencies make expenditures that indirectly support the tourism sector. The following table summarizes these expenditures in terms of the National Tourism Strategy priorities. This is followed by a discussion of specific federal activities in each of the six priority areas.

| Department or | NTS Priorities | | | | | | |
|--|----------------|----------------|-----------------|---------------|----------------|-----------------|-----------------|
| Agency | Borders | Transport | Prod Dev | HR | Stats & Info | Marketing | Total |
| Direct Expenditures | | | | | | | |
| Aboriginal Business Canada | - | - | \$5.0 million | - | - | - | \$5.0 million |
| Atlantic Canada Opportunities Agency | - | - | \$9.3 million | - | \$208 thousand | \$3.3 million | \$12.8 million |
| Canada Economic Development for Quebec Regions | - | - | \$20.3 million | - | \$663 thousand | \$9.5 million | \$30.4 million |
| Canadian Tourism Commission | - | - | \$1.4 million | - | \$2.3 million | \$83.1 million | \$86.8 million |
| FedNor | - | - | \$2.2 million | - | - | \$2.1 million | \$4.3 million |
| Human Resources and Skills Development Canada | - | - | - | \$6.1 million | \$336 thousand | - | \$6.4 million |
| Indian and Northern Affairs Canada | - | - | \$6.3 million | - | - | - | \$6.3 million |
| National Capital Commission | - | - | \$7.0 million | - | - | - | \$7.0 million |
| Parks Canada | - | - | \$186.0 million | - | \$2.0 million | \$2.7 million | \$190.7 million |
| Statistics Canada | - | - | - | - | \$7.8 million | - | \$7.8 million |
| Transportation, Infrastructure, Communities | - | - | \$45.0 million | - | - | - | \$45.0 million |
| Western Economic Diversification | - | - | \$5.0 million | - | - | - | \$5.0 million |
| Total Direct | - | - | \$287.5 million | \$6.1 million | \$13.3 million | \$100.7 million | \$407.6 million |
| Indirect Expenditure | s (for infori | mation): | | | | | |
| Agriculture and Agri- Food Canada | - | - | - | - | - | \$300 thousand | \$300 thousand |
| Canadian Heritage | - | - | \$120.3 million | - | \$461 thousand | - | \$120.7 million |
| FedNor | - | - | \$4.7 million | - | - | - | \$4.7million |
| Indian and Northern Affairs Canada | - | - | \$265 thousand | - | - | - | \$265 thousand |
| National Capital Commission | - | - | \$10.3 million | - | - | - | \$10.3 million |
| Parks Canada | - | \$32.8 million | \$121.2 million | - | - | \$4.9 million | \$158.9 million |
| Western Economic Diversification | - | - | \$12.9 million | - | - | - | \$12.9 million |
| Total Indirect | | \$32.8 million | \$269.6 million | - | \$461 thousand | \$5.2 million | \$308.1 million |

Accessible Destination - Border Crossing

Through the Border Infrastructure Fund (BIF) Infrastructure Canada has funded improvements in Canada's border-crossing infrastructure - local access roads and rail infrastructure to and from border crossings, additional lanes and approaches to existing access roads to and from border crossings, sections of Canadian highways which provide direct access to a border, infrastructure at borders such as building of facilities and the construction or expansion of bridge capacity, and clearance facilities. Infrastructure Canada has also funded Intelligent Transportation System Infrastructure projects, serving to increase the rate of crossings for low-risk traffic, while ensuring security is not compromised.

These investments have not been included in the total tabulations of tourism investments because they serve many purposes besides tourism, but they are reported here because modern and efficient border-crossing facilities are important to the long-term success of the tourism sector.

| DEPARTMENT/AGENCY | EXPENDITURES ON BORDER CROSSINGS |
|-----------------------|--|
| Infrastructure Canada | As previously noted, this amount is not included in the direct tourism expenditure total for 05/06, but is relevant to the federal commitment to border crossings - \$72.3 million was committed and announced in 05/06 for border infrastructure projects under BIF (note that this amount does not include information for the Border Modelling Project), but this funding is not specific to tourism. |

Accessible Destination – Transportation

Infrastructure Canada also funds improvement in transportation – highways and rail infrastructure. These funds are distributed through the Canada Strategic Infrastructure Fund. These amounts are not included in the total for direct tourism expenditures because these infrastructure investments serve the entire transportation sector, not just tourism.

| DEPARTMENT/AGENCY | EXPENDITURES ON TRANSPORTATION |
|-----------------------|--|
| Infrastructure Canada | As previously noted, this amount is not included in the direct tourism expenditure total for 05/06, but is relevant to note as federal commitment to infrastructure - \$122.7 million was invested in transportation infrastructure during 2005 – 2006 FY, but is not specific to tourism. |

Exceptional Experiences – Product Development

Continual development of new products is essential for destinations to remain fresh, to be able to respond to changing market segments, to give visitors reasons to stay longer in a destination, and to generate new opportunities for job and wealth creation. Product development includes assistance to individual enterprises to start or upgrade their product offerings, the provision of information to businesses to assist them with identifying and implementing product development opportunities, programming of tourism events, and the operation of public tourism attractions.

| DEPARTMENT/AGENCY | EXPENDITURES ON PRODUCT DEVELOPMENT |
|--|-------------------------------------|
| Aboriginal Business Canada | \$5.0 million |
| Atlantic Canada Opportunities Agency | \$9.3 million |
| Canada Economic Development for Quebec Regions | \$20.3 million |
| Canadian Tourism Commission | \$1.4 million |
| FedNor | \$2.2 million |
| Industry and Northern Affairs Canada | \$6.3 million |
| National Capital Commission | \$7.0 million* |
| Parks Canada | \$186 million |
| Transportation, Infrastructure, Communities | \$45.0 million |
| Western Economic Partnership Agreement | \$5.0 million |
| Total | \$ 287.5 million |

^{*} A portion of these expenditures were also marketing-related

Exceptional Hosts - Human Resources

Tourism is a set of services provided by various industries – such as transportation, accommodation, food services, recreation and entertainment, travel trade, and convention services. The quality of service provided by workers in these industries is critical in shaping visitors' perceptions of the quality of Canada's tourism offerings. The agency that has human resource development in tourism as well as the enhancement of tourism as a career choice as its core focus is the Canadian Tourism Human Resource Council, a sectoral council of Human Resources and Skills Development Canada.

| DEPARTMENT/AGENCY | EXPENDITURES ON HUMAN RESOURCES |
|---|---------------------------------|
| Human Resources and Skills Development Canada | \$6.1 million |
| Total | \$6.1 million |

Exceptional Reputation – Tourism Information and Statistics

Investment in tourism information and statistics is a key activity for a number of federal departments and agencies. Statistics Canada conducts several surveys of visitors as well as tourism businesses. They also are responsible for important tourism information tools such as the National Tourism Indicators. The Canadian Tourism Commission and the Canadian Tourism Human Resource Council also invest in tourism research and information tools, frequently in partnership with Statistics Canada.

| DEPARTMENT/AGENCY | EXPENDITURES ON INFORMATION AND STATISTICS |
|--|--|
| Atlantic Canada Opportunities Agency | \$208 thousand |
| Canada Economic Development for Quebec Regions | \$663 thousand |
| Canadian Tourism Commission | \$2.3 million |
| Human Resources and Skills Development Canada | \$336 thousand |

| Parks Canada | \$2.0 million |
|-------------------|----------------|
| Statistics Canada | \$7.8 million |
| Total | \$13.3 million |

Exceptional Reputation – Tourism Marketing

Marketing is a key activity in tourism, with programs ranging from encouraging Canadians to travel in Canada, through awareness-building in key international markets, to activities designed to drive sales to tourism enterprises. The primary federal player in tourism marketing is the Canadian Tourism Commission. Other departments and agencies involved in tourism marketing include the Atlantic Canada Opportunities Agency, Canada Economic Development for Quebec Regions, and FedNor.

| DEPARTMENT/AGENCY | EXPENDITURES ON TOURISM MARKETING |
|--|-----------------------------------|
| Atlantic Canada Opportunity Agency | \$3.3 million |
| Canada Economic Development for Quebec Regions | \$9.5 million |
| Canadian Tourism Commission | \$83.1 million |
| FedNor | \$2.1 million* |
| Parks Canada | \$2.7 million |
| Total | \$ 100.7 million |

^{*} This funding also supported marketing-related research and human training programs to enhance marketing capacity of communities and the skills of Northern Ontario residents.

DETAILED FINDINGS

This section presents federal expenditures on tourism for FY 2005 – 2006 in terms of direct and indirect spending.

Direct tourism expenditures include:

- The provision of visitor services and experiences (attractions, events, and direct visitor contact)
- Acquisition of assets, capital investment, and various other business development expenses directly related to tourism
- Human resource development specific to tourism
- Tourism-specific regional-development programs
- Tourism marketing and research
- Tourism infrastructure

Indirect tourism expenditures include:

• Expenditures for programs that were deemed to be primarily for local residents or to support local artistic/cultural groups

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FEDERAL TOURISM EXPENDITURES - FISCAL YEAR 2005 / 2006

| DEPARTMENT / AGENCY | DIRECT EXPENDITURES | <u>INDIRECT EXPENDITURES</u> | TOTAL DIRECT TOURISM EXPENDITURES |
|------------------------------------|---|---|------------------------------------|
| Aboriginal Business Canada | Multiple projects through Aboriginal Business Development Program: \$5.0 M | NIL | \$5.0 Million |
| Agriculture and Agri-food Canada | NIL | Restaurant and hotel promotion relating to Canadian food and agricultural products abroad: \$\frac{135 \ K}{2}\$ Hosting incoming journalist missions related to food and agriculture: \$\frac{165 \ K}{2}\$ Indirect Total: \$\frac{300 \ K}{2}\$ | NIL |
| Atlantic Canada Opportunity Agency | 274 Business Development Program projects: \$8.2 M Atlantic Investment Partnership – Strategic Community Investment Fund: \$1.1 M 3 Atlantic Investment Partnership Tourism projects: \$3.5 M | NIL | \$12.8 Million |

| DEPARTMENT / AGENCY | <u>DIRECT EXPENDITURES</u> | INDIRECT EXPENDITURES | TOTAL DIRECT TOURISM EXPENDITURES |
|---|---|---|------------------------------------|
| Canada Economic Development for Quebec Regions | Innovation, Development, Entrepreneurship, and Access Program for Small and Medium-Sized Enterprises Organizations: \$2.0 M; SMEs: \$141 K Regional Strategic Initiative: Organizations: \$25.4 M; SMEs: \$2.9 M | NIL | \$30.4 Million |
| Canadian Heritage | NIL | Tourism Policy and Research \$461 K Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative: \$111 K Sport Canada Hosting Program: \$21.5 M Arts Presentation Canada: \$20.7 M Cultural Capitals of Canada: \$1.7 M Cultural Spaces Canada: \$19.3 M Federal Tourism Partners Agreement for Newfoundland and Labrador: \$10 K Official Languages Support Program: \$244 K Canada Council for the Arts: \$56 M PCH Portfolio (National Gallery and Museum Photography, Canada Science and Technology Museum, Canadian Museum of Civilization): \$681 K | NIL |

| | | Indirect total - \$120.7 M | |
|--|--|---|----------------|
| Canadian Tourism Commission | Research and statistics: \$2.3 M Product development: \$1.4 M Human resources: \$17.2 M Marketing: \$56.3 M Other: \$9.6 M | NIL | \$86.8 Million |
| Federal Economic Development Initiative in Northern Ontario | Tourism Fund – Capital: 11 projects: \$2.2 M Tourism Fund – Non-Capital: 27 projects: \$2.1 M | Northern Ontario Development Program, Eastern Ontario Development Program, and Community Futures Program: 57 projects: \$4.7 M Indirect Total: \$4.7 M | \$4.3 Million |

| Human Resources and Skills Development Canada | All programs are delivered through Canadian Tourism Human Resource Council Core infrastructure: \$714 K Communications and delivery: \$979 K Labour and market research: \$336 K Ready-to-work programs: \$2.3 M Electronic delivery: \$2.1 M | NIL | \$ 6.5 Million |
|--|--|-----|----------------|
|--|--|-----|----------------|

| DEPARTMENT / AGENCY | <u>DIRECT EXPENDITURES</u> | INDIRECT EXPENDITURES | TOTAL DIRECT TOURISM EXPENDITURES |
|------------------------------------|--|---|------------------------------------|
| Indian and Northern Affairs Canada | Economic Development Opportunity Fund: \$1.1 M Establishment of hotel: \$15 K Major Business Projects Program: \$339 K Regional Partnership Fund: \$2.1 M | Resource Partnerships Program: \$85 K Resource Access Negotiations: \$180 K | \$6.3 Million |
| | Regional Partnership Fund: \$2.1 M Targeted Investment Program: \$2.3 M Innovation and Knowledge Fund: \$419 K | Indirect Total: \$265 K | |
| National Capital Commission | Canada & World Pavilion:\$254 K Sound & Light show on Parliament: \$1.43 M Discover the Hill Programming: \$605 K Commemorations: \$282 K Capital Interpretations: \$486 K Rideau Canal Skateway: \$325 K Canada Day Celebrations: \$552 K Winterlude: \$718 K Fall Rhapsody/Other Activities: \$2.3 M | Canada & World Pavilion: \$254 K Sound & Light show on Parliament: \$252 K Commemorations: \$94 K Capital Interpretations: \$162 K Rideau Canal Skateway: \$975 K Canada Day Celebrations: \$941 K Winterlude: \$1.22 M Fall Rhapsody/Other Activities: \$6.43 M | \$ 7.0 Million |
| Parks Canada | Establish Heritage Places: \$15.7 M Parks Appreciation & Understanding: \$43.1 M Quality Visitor Services: \$125.8 M Townsite Management: \$6.1 M | Parks Appreciation and Understanding: \$4.9M Through Highways: \$32.8M Conserve Heritage: \$121.2M Indirect Total: \$158.9 M | \$190.7 Million |

| DEPARTMENT / AGENCY | <u>DIRECT EXPENDITURES</u> | INDIRECT EXPENDITURES | TOTAL DIRECT TOURISM EXPENDITURES |
|---|--|---|------------------------------------|
| Statistics Canada | Travel Survey of Residents of Canada: \$2.5 M International Travel Survey: \$2.4 M Annual Survey of Traveller Accommodations: \$576 K Annual Survey of Travel Arrangements: \$248 K Business Conditions Survey for the Traveller Accommodation Survey: \$120 K Pilot Business Conditions Survey of Tour Operators, Arts, Heritage Institutions, and Recreation: \$109 K Tourism Satellite Account: \$65 K National Tourism Indicators: \$250 K Human Resource Module for the Tourism Satellite Account: \$100 K Canadian Tourism Satellite Account Handbook: \$55 K | NIL | \$7.8 Million |
| Transport, Infrastructure, and Communities Portfolio | Canada Strategic Infrastructure Fund (CSIF) 4 Projects: \$42.1 M Municipal Rural Infrastructure Fund (MRIF) 1 Project: \$2.9 M | NIL | \$45.0 Million |
| Western Economic Diversification | Western Economic Partnership Agreement (WEPA): \$5.0 M | Urban Development Agreement (UDA): \$114 K Francophone Economic Development Organization (FEDO): \$103 K Western Diversification Program (WDP): \$5.1 M Alberta and Saskatchewan Centenaries: \$7.6 M (Program is delivered on behalf of the GoC) Indirect Total: \$12.9 M | \$5.0 Million |

| Grand Totals: | \$ 308.1 Million | \$ 407.6 Million |
|---------------|------------------|------------------|
|---------------|------------------|------------------|

TOURISM AS AN ACTIVITY IN FEDERAL DEPARTMENTS AND AGENCIES

Aboriginal Business Canada (ABC)

ABC recognizes tourism as an opportunity for Aboriginal entrepreneurs. It supports Aboriginal businesses such as attractions, accommodations, transportation, food services, and retail outlets.

Agriculture and Agri-Food Canada (AAFC)

Tourism, especially culinary tourism, is seen as an opportunity to raise awareness of Canadian food products. AAFC supports food journalists in visiting Canada to write about food topics; the department also promotes Canadian food products in restaurants internationally.

Atlantic Canada Opportunities Agency (ACOA)

Tourism is one of five strategic priorities for ACOA. In addition to supporting product development, ACOA operates the Atlantic Canada Tourism Partnership (ACTP). ACTP conducts marketing activities and research in New England, the UK, German-speaking countries in Europe, and Japan.

Business Development Bank of Canada (BDC)

BDC provides loans to tourism businesses.

Canada Economic Development for the Regions of Quebec

This agency supports tourism projects that promote economic growth and improved quality of life in Quebec communities.

Canadian Heritage

Canadian heritage has a significant but indirect relationship with tourism. It operates the Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative to promote the understanding that support for Canada's cultures and the sustainability of tourism are mutually reinforcing. The Department also has a Tourism Policy and Research Program. Many of the cultural institutions operated by Canadian Heritage are important tourism attractions, and it operates numerous programs that help tourism flourish. Canadian Heritage also is one of the departments charged with co-ordinating the federal role in the 2010 Olympic Winter Games.

Canadian Tourism Commission (CTC)

Tourism is the *raison d'etre* of the CTC. The emphasis is on generating tourism exports – attracting international visitors to Canada. It also encourages Canadians to travel within their country. The CTC conducts tourism research, especially through partnerships with Statistics Canada, the provinces/territories, and other organizations. The CTC supports product development and sustainable tourism through partnerships with Parks Canada and the Tourism Industry Association of Canada.

Federal Economic Development Initiative in Northern Ontario (FedNor)

FedNor promotes activities aimed at product development and capacity-building of businesses to help the region attract more visitors. Its activities include marketing, training, and product development.

Human Resources and Social Development Canada (HRSDC)

HRSDC supports a number of sectoral councils, including the Canadian Tourism Human Resource Council (CTHRC). CTHRC is committed to ensuring that the tourism and hospitality sectors have access to adequate numbers of appropriately trained employees. Its work includes promoting tourism as a career, documenting the job skills and career paths associated with tourism occupations, forecasting demand for tourism occupations, and promoting certification and employee recognition programs.

Indian and Northern Affairs Canada (INAC)

INAC supports community capacity-building as well as sustainable economic development activities in northern and Aboriginal communities. Tourism is seen as one of the strategic sectors that supports this goal.

National Capital Commission (NCC)

Tourism is an outcome of the NCC's activities. It operates the Capital Infocentre, the Gatineau Park Visitor Centre, the Capital Contact Centre, the NCC web site, and other venues. Its focus is on delivering a positive experience for visitors to the nation's capital.

Parks Canada (PCA)

Parks provides "memorable, high-quality experiences" through investments in infrastructure, facilities, programs, and services. The visitor experience can include pre- and on-site trip planning information, reception and orientation services, campgrounds, hiking trails, other recreational services, public safety programs, and post-visit information and engagement. The emphasis on visitor experiences is balanced with the mandate to preserve Canada's natural and heritage resources.

Statistics Canada (StatCan)

Statistics Canada collects and reports statistics on domestic and international travel, including numbers of travellers, spending, and various trip/traveller characteristics. This information is used by the Canadian Tourism Commission, provincial and territorial tourism agencies, destination marketing organizations, and tourism researchers. It also collects and tabulates macro-economic tourism information such as the value of tourism imports and exports in the context of calculating tourism's contribution to GDP and its net impact on the Balance of Payments.

Transport Canada and Infrastructure Canada

Infrastructure Canada operates several capital investment programs that have relevance to tourism and that also serve other people and sectors. Programs support border-crossing infrastructure, municipal infrastructure, and a variety of transportation systems. Many of the 16 Crown Corporations that are part of the portfolio are important to tourism, such as the National Capital Commission, VIA, the Royal Mint, various bridge authorities, the Old Port of Montreal, and Marine Atlantic.

Western Economic Diversification (WD)

WD provides funding for tourism projects that strengthen economic activity and improve the quality of life in western communities. WD also supports Francophone Economic Development Organizations that provide economic development and business services to francophone entrepreneurs and communities.