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# FORWARD MOTION

A STRATEGIC PLAYBOOK FOR  
ONTARIO'S TOURISM INDUSTRY  
2025-2030

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# INTRODUCTION



# UNLOCKING ONTARIO'S TOURISM POTENTIAL

Ontario's tourism sector is at a defining moment – resilient, ambitious, and ready to chart a bold path forward. Years of disruption have tested the industry's strength and adaptability, and while strong gains have been made, key indicators like visitation, spending, and employment still have room to grow. International markets are rebuilding, business events are regaining momentum, and visitors' expectations are evolving – presenting clear opportunities to close service gaps and expand access across the province.

Ontario's tourism economy is moving beyond stability – growth is the goal. This is no longer about short-term recovery; it's about realizing Ontario's full tourism potential and leading the way as other provinces sharpen their brands and invest in their assets. Ontario is determined not just to keep pace, but to set the pace. Our performance is critical to Canada's goal of reclaiming a top 10 global tourism ranking by 2030 – and we have every advantage to make that happen.

The sector's contribution to local prosperity is undeniable, with nearly 80 municipalities now relying on the municipal accommodation tax to invest in community infrastructure and services that enrich the quality of life for residents and visitors alike. With a clear strategy, tourism can unlock billions more in GDP, grow annual tax revenues to over \$13 billion, and create tens of thousands of new jobs by 2030.

Ontario has what it takes to lead. The province boasts one of North America's most diverse and experience-rich tourism ecosystems – powered by innovative operators, world-class destinations, and a globally trusted brand. This strategy answers the call for a renewed, sector-wide commitment: a shared vision, clear direction, and strong coordination that will amplify our collective efforts and position Ontario's visitor economy for sustainable, long-term success.

## THAT'S WHY THIS NEW STRATEGY MATTERS NOW.

Initiated by the Tourism Industry Association of Ontario (TIAO), this strategy is a bold, sector-led roadmap designed to harness the collective strengths of Ontario's diverse tourism ecosystem. Co-created through extensive, province-wide consultation, it reflects the voices and insights of Indigenous leaders, small business owners, major attractions, regional tourism organizations (RTOs), sectoral organizations, destination marketing and management organizations (DMOs), educators, and public agencies.

This strategy recognizes tourism as a place-based, interconnected system that is deeply rooted in local economies and communities. Its dual purpose is clear: to re-establish alignment across Ontario's tourism landscape and to chart a focused path toward resilient, long-term growth.

We're not starting from scratch – we're building on what works. This strategy draws on existing plans, relationships, and research, and it signals a new era of collaborative tourism leadership and governance. Government helps shape the enabling conditions. Destination Ontario tells our story to the world. TIAO and sector leaders convene, champion, and advocate. Regional and local partners deliver on the ground. Communities and businesses bring the visitor experience to life.

Above all, this strategy provides a renewed foundation and a bold vision for a more connected, competitive, and coordinated future – one that is **industry-led, government-enabled, and market-driven**.

# CONSULTATION APPROACH

## INCLUSIVE VOICES

To develop Ontario's new tourism strategy, the Tourism Industry Association of Ontario (TIAO) partnered with Context Research Group Inc. (CRG) to lead a robust, multi-phase consultation process that captured the lived experiences, aspirations, and insights of the entire sector. Recognizing that no single organization or level of government can shape the future of tourism alone, this process was deliberately inclusive – bringing together diverse voices from every region and subsector to co-create a shared framework for progress and a clear set of strategic goals.

The journey began in October 2024 with the launch of a Sector Input Survey, which was widely shared across Ontario's tourism network. This open-access tool invited participation from operators of all sizes, cultural institutions, transportation providers, educators, and many others. A total of 654 respondents contributed their perspectives on emerging trends, pressing challenges, and foundational priorities to guide the strategy's direction.

Building on that momentum, a second phase unfolded in December 2024 with a series of stakeholder-specific focus groups, including sessions dedicated to Indigenous stakeholders. Organized by region and subsector, these conversations gave participants the chance to cross-examine early themes and shape the strategic pillars that would anchor the strategy. Across nine sessions, 80 participants shared candid insights about what matters most – not just for their own organizations, but for the sector's shared success.

To deepen this work, TIAO established a dedicated Insights Community in early 2025 – a diverse network of over 200 individuals representing every corner of Ontario's tourism landscape. This group stress-tested the emerging framework, provided targeted feedback on each strategic pillar, and helped define the tangible goals, actions, and performance measures needed to bring the strategy to life. This community's role doesn't end here; they will remain a trusted sounding board for ongoing input and accountability as the strategy moves into implementation.

In the final phase, a second round of focus groups in March 2025 brought operational depth to the conversation. Designed as smaller, practical sessions, these discussions engaged 24 participants in refining how the strategy could align with local realities, identify success metrics, and remain measurable, actionable, and responsive to on-the-ground needs.

Taken together, this extensive consultation process grounded the strategy in the day-to-day realities of Ontario's operators, communities, and visitors. It emphasized transparency, iteration, and cross-sector collaboration – principles that will continue to guide implementation. Above all, it reaffirmed a core belief: when the sector leads and every voice is heard, Ontario's tourism system becomes stronger, more resilient, and better equipped to thrive.

It's important to recognize that this work unfolded during a period of significant geopolitical and economic disruption – most notably the tariff escalation initiated by the United States Government. These external challenges, layered on top of the sector's ongoing recovery, sharpened the focus of every consultation conversation and shaped the strategic goals that emerged. The resulting framework reflects not just the ambitions of Ontario's tourism community, but also its adaptability – offering a confident, forward-looking response to global uncertainty, market volatility, and the drive to diversify.

# ONTARIO'S TOURISM INDUSTRY OVERVIEW



# COMMUNITY, CULTURE, AND ECONOMIC CATALYST

Tourism in Ontario is more than an industry - it is a dynamic system of community connection, cultural expression, economic growth, and global engagement. It reaches into every corner of the province, weaving together small businesses and global gateways, natural landscapes and downtown cores, long-standing traditions and future-facing innovations.

At its core, tourism is a catalyst - sparking investment, enhancing quality of life, and strengthening local identity. When people travel within Ontario, from across Canada, or around the world, they don't just fuel spending in hotels and restaurants. They activate domestic supply chains, drive demand for local food, creative content, experiences, and transportation services, and inject energy into sectors ranging from arts and culture to construction, real estate, technology, and more.

## TOURISM'S IMPACT IS MULTIDIMENSIONAL, INCLUDING THE FOLLOWING FACTORS:

### ECONOMIC DRIVER

Ontario's visitor economy spans a vast network of sectors: accommodations, food and beverage, attractions and entertainment, meetings and events, travel services, transportation, and arts, culture, and heritage. But its influence goes even further. Tourism supports indirect industries like utilities, agriculture and agri-food, manufacturing, finance, and professional services. Through induced effects, it circulates wages into housing, education, childcare, healthcare, and everyday consumer spending – strengthening communities from the ground up.

Tourism also generates substantial tax revenues, including municipal accommodation tax dollars that help municipalities invest in infrastructure and public services that build more livable places.



## CULTURAL AND SOCIAL CONNECTOR

Tourism shapes how the world sees Ontario - and how Ontarians see themselves. Vibrant festivals, Indigenous tourism experiences, culinary destinations, heritage sites, and film industries make Ontario known globally as diverse, welcoming, and full of life. These experiences not only attract visitors, but build bridges between communities, generations, and cultures.

Tourism is also a platform for inclusive opportunity: from youth employment and newcomer integration to career pathways in creative, hospitality, and service sectors. It unlocks access to work, fosters pride of place, and makes meaningful space for voices and stories across the province.

## PLACE-MAKER AND COMMUNITY BUILDER

Tourism supports revitalization efforts in downtowns, waterfronts, and rural corridors. It enhances the public realm - through better signage, trails, transit, and gathering spaces – and helps communities articulate and invest in what makes them unique. Strong tourism destinations also attract residential development, workforce talent, and diverse business investment, reinforcing the essential link between great places to visit and great places to live.

Tourism assets like convention centres, sport complexes, provincial parks, and regional transportation hubs serve both visitors and residents - making tourism infrastructure a shared civic resource.

## STRATEGIC ENABLER

Tourism plays a critical role in advancing provincial priorities. It supports economic reconciliation with Indigenous communities, fuels small business development, accelerates digital infrastructure readiness, and scales environmental and regenerative practices. It also contributes to Ontario's global trade footprint – representing a significant share of international service exports.

In short, tourism is not a silo – it is a strategic enabler, community anchor, and storytelling engine. Its impact is visible not only in economic charts, but in vibrant main streets, celebrated cultural institutions, thriving small towns, and the lived experiences of millions of Ontarians. A thriving visitor economy is a signal – and a driver – of a stronger, more connected Ontario.



[www.rbg.ca/gardens-trails/by-attraction/trails/indigenous-trail](http://www.rbg.ca/gardens-trails/by-attraction/trails/indigenous-trail)

# ECONOMIC IMPACT

Understanding the current state of Ontario's tourism economy is essential to shaping a strategy that is both ambitious and grounded. The figures that follow represent the most recent baseline data available from the Ministry of Tourism, Culture and Gaming. They offer a clear, evidence-based snapshot of visitor spending and market composition, an important reference point from which future growth can be projected. By beginning with this foundation, we gain insight into where the sector stands today and establish the context necessary to imagine what comes next. These numbers serve as both a mirror and a map: they reflect the structure and dynamics of tourism as it exists now, while guiding the projections and strategic priorities that follow. In doing so, they help illustrate how tourism can continue to evolve as a powerful contributor to Ontario's economy, supporting regional prosperity, job creation, and long-term economic resilience.

## HISTORIC PERFORMANCE Visitor Spending by Key Market

The spending numbers presented below reflect the 2022 baseline year, which serves as the foundation for all forward-looking projections in this strategy. They provide a snapshot of total visitor spending segmented by key demographic categories: domestic Ontario residents, other Canadian travellers, United States visitors, and other international markets. This breakdown offers a clear view of where Ontario's tourism economy stood using the most recent publicly available data (2022), illustrating the relative weight of each market and the structural composition of tourism demand. By understanding the current distribution of spending across visitor types, we can more effectively target growth opportunities, align investments, and anticipate shifts in market behaviour that will shape the path forward.

### 2022 ONTARIO VISITOR SPENDING

	TOTAL VISITOR SPENDING (CAD)	PROPORTION
Ontario Visitors	<b>\$19,003,173,672</b>	<b>66%</b>
Canadian Visitors	<b>\$3,564,800,689</b>	<b>12%</b>
U.S. Visitors	<b>\$3,143,324,468</b>	<b>11%</b>
Overseas Visitors	<b>\$2,935,603,471</b>	<b>10%</b>

## HISTORIC PERFORMANCE Visitor Numbers by Key Market

Alongside spending figures, visitor volumes provide a vital lens through which to understand the current shape and scale of Ontario's tourism economy. The following data reflects the most recent 2022 visitor counts, segmented across the same markets as above. These figures help clarify the relative weight of each segment within Ontario's tourism system. When considered in tandem with spending data, they reveal critical insights into the behaviours, yields, and economic contributions of each market. Understanding the composition of visitation is essential to projecting future impacts, as the makeup of these segments will influence everything from GDP contributions and tax revenue to workforce demand and infrastructure planning. These numbers help shape a forward-looking view of tourism's potential, grounded in the realities of who is visiting Ontario and why.

### 2022 ONTARIO VISITOR ORIGIN

	TOTAL VISITOR COUNT	PROPORTION
Ontario Visitors	<b>99,842,035</b>	<b>87%</b>
Canadian Visitors	<b>5,791,719</b>	<b>5%</b>
U.S. Visitors	<b>6,999,000</b>	<b>6%</b>
Overseas Visitors	<b>1,682,000</b>	<b>1%</b>

## ANTICIPATED 2025 PERFORMANCE

### Spending, GDP, Direct Employment, Taxes

Ontario's tourism sector is projected to grow by about 2% in 2025, generating **\$30.7 billion in visitor spending in 2025**, translating to **\$29.7 billion in GDP impact<sup>1</sup>**. This includes **\$17.1 billion in direct contributions** (accommodation, food, retail, entertainment), plus **\$5.5 billion in indirect** and **\$7.1 billion in induced impacts**, reflecting tourism's wider economic ripple.

Visitor spending will support an estimated **290,004 direct jobs**, spanning full-time, part-time, seasonal, and contract roles – though this falls short of what higher-growth scenarios could deliver.

Tourism is also expected to generate **\$11.0 billion in tax revenue**, split between the **federal (\$4.8B)**, **provincial (\$5.0B)**, and **municipal (\$1.2B)** governments, underscoring its value as a stable source of public funding.

METRIC	PROJECTED 2025 VISITOR SPENDING
Total Visitor Spending	<b>\$30,718,474,731</b>
Total GDP Impact of Visitor Spending	<b>\$29,685,335,058</b>
Direct GDP	\$17,095,173,361
Indirect GDP	\$5,471,423,177
Induced GDP	\$7,118,738,520
Direct Employment from Visitor Spending (Jobs)	<b>290,004</b>
Total Taxes from Spending	<b>\$11,044,834,321</b>
Federal Taxes	\$4,825,413,052
Provincial Taxes	\$5,039,875,855
Municipal Taxes	\$1,179,545,413

These projections show a sector capable of steady output but limited upside without **strategic reinvestment and coordinated policy action**. Even modest, sustained growth can unlock transformative returns—but inaction carries lasting opportunity costs. The time to act is now.

## FROM STABILIZATION TO LIFT-OFF: WHY 2025 SIGNALS A TURNING POINT

2025 is not just a checkpoint—it's a proof point. In just three years since 2022, Ontario's tourism economy has rebuilt a strong foundation, with visitor spending projected to reach over \$30 billion. This momentum is not accidental; it reflects the sector's adaptability, local ingenuity, and collective will to recover stronger.

But more importantly, 2025 tells us what's possible. This year's projected impact—nearly \$30 billion in GDP, over 290,000 direct tourism jobs, and \$11 billion in tax revenue—demonstrates that even modest investment can yield powerful results. Imagine what Ontario could achieve with bold, aligned action.

The 2025 numbers are a launchpad. They hint at what a fully energized, coordinated tourism system could look like by 2030. If we can grow by 2% with limited strategy, what could we unlock with a unified, sector-led plan?

Ontario's opportunity isn't just to regain lost ground—it's to leap ahead. To reclaim Canada's top 10 global ranking, fuel new job growth, and anchor tourism as a key driver of economic and community resilience. 2025 is a milestone that proves we're back in the game. The next step is making sure we win it.

<sup>1</sup> Projections are based on an economic forecast model developed by Context Research Group Inc. which utilizes historical Ontario tourism data from 2012 through 2022 provided by the Ministry of Tourism, Culture, and Gaming and Statistics Canada.

# STAKEHOLDER MIX

Ontario's tourism system is shaped and sustained by a diverse network of interconnected partners – public, private, Indigenous, and non-profit – each playing a distinct yet complementary role and each with unique business models and varying degrees of funding consistency and certainty. From provincial ministries and national marketing agencies to local operators and Indigenous tourism leaders, this collaborative ecosystem enables the delivery of visitor experiences, guides investment, shapes policy, and drives economic and cultural impact. Highlighting these stakeholders is essential to understanding how strategy becomes action. Just as importantly, the strategy identifies opportunities to better optimize this network - enhancing coordination, clarifying roles, and unlocking greater value through alignment. Acknowledging the structure and strengths of this system provides a foundation for more integrated, responsive, and future-ready implementation across Ontario.

## PROVINCIAL GOVERNMENT Ministries of Tourism, Culture, and Gaming (MTCG) and Sport

**Role:** Sets a vision, policy frameworks, and strategic investments in tourism across Ontario.

### Responsibilities:

- Funding and management of key programs (e.g., regional tourism, festivals and events grants, etc.)
- Owner and operator of key tourism assets and agencies (e.g., Ontario Place, Metro Toronto Convention Centre, Destination Ontario, cultural facilities, etc.)
- Legislative and regulatory oversight (e.g., Transient Accommodation Tax, Travel Industry Act, etc.)
- Cross-ministerial alignment (e.g., housing, labour, infrastructure)
- Provision of data

**Relationship:** Works closely with industry stakeholders; funding agreements with Regional Tourism Organizations (RTO), provides enabling conditions for sector development.

## TOURISM INDUSTRY ASSOCIATION OF ONTARIO (TIAO)

**Role:** Sector-wide advocate and strategy facilitator.

### Responsibilities:

- Policy and advocacy
- Sector convening and consultation
- Program development and communications

**Relationship:** Connects industry voices to government and aligns regional and sector partners and operators behind shared goals.

## DESTINATION ONTARIO

**Role:** Provincial marketing lead – domestic, U.S., and overseas – and brand steward.

### Responsibilities:

- Develops and executes provincial tourism marketing campaigns
- Conducts market research and provides insights
- Provides brand tools and engages in partnership marketing programs with Regional Tourism Organizations (RTO), Destination Marketing Organizations (DMO), sector organizations and operators

**Relationship:** Collaborates with DMOs, RTOs, sector organizations and operators to ensure cohesive messaging as well as domestic and international visibility.

## REGIONAL TOURISM ORGANIZATIONS (RTOs)

**Role:** Industry-driven regional capacity builders and service providers.

**Responsibilities:**

- Regional marketing and product development
- Regional Investment attraction
- Regional workforce development
- Data collection and dissemination
- Supporting local DMOs and operators through coordination and support

**Relationship:** Serve as the bridge between regional markets and provincial entities (Ministry of Tourism, Culture, and Gaming, Destination Ontario, TIAO, and Sector Organizations), represent and cultivate unique aspects of regions and markets.

## DESTINATION MARKETING AND MANAGEMENT ORGANIZATIONS (DMOs)

**Role:** Local destination stewards and promoters.

**Responsibilities:**

- Local tourism strategic development
- Execute place-based marketing and programming
- Support tourism businesses
- Destination management investments and activities
- Advocate for local tourism needs

**Relationship:** Coordinate with municipalities, RTOs, Destination Ontario, TIAO and Sector Organizations; work closely with operators to shape and promote experiences.

## TOURISM OPERATORS (BUSINESSES)

**Role:** Frontline facilitators of visitor experiences and tourism brands.

**Responsibilities:**

- Business and employment investment
- Provide services (e.g., accommodations, tours, dining, etc.)
- Invest in visitor offerings and infrastructure
- Contribute to destination identity

**Relationship:** Engage with municipalities, DMOs, RTOs, respective sector associations, and TIAO; depend on network alignment, support, and advocacy for business services, marketing, workforce, investment, infrastructure, and funding support.

## PROVINCIAL TOURISM SECTOR ORGANIZATIONS

**Role:** Sectoral industry expertise and services, capacity building.

**Responsibilities:**

- Provide sector-specific advocacy, professional development, networking, etc.
- Provide sector-specific training and certification programs (e.g., workforce, sustainability, culinary, Indigenous, etc.)
- Conduct sector-specific tourism research & marketing services
- Typically represent:
  - Product/Service-defined communities, e.g., hotels, restaurants, resorts, attractions, etc.,
  - Functionally-defined communities, e.g., human resources (OTEC)
  - Culturally-defined communities, e.g., Indigenous tourism (ITO)

**Relationship:** Represent, serve, and partner with operators, municipalities, DMOs, RTOs, TIAO to strengthen professional standards, drive sectoral-innovation, and to advocate for unique needs. \*

## MUNICIPAL GOVERNMENTS & ECONOMIC DEVELOPERS

**Role:** Enablers of local tourism infrastructure, investment, development, and operations.

**Responsibilities:**

- MAT implementations, industry consultation, destination marketing and management (i.e., municipal service corporations)
- Approve land use, zoning, bylaws, and development
- Deliver infrastructure and services that support tourism
- Economic development and investment

**Relationship:** Collaborate with operators, DMOs, RTOs, and provincial government on shared economic development goals.

## INDIGENOUS TOURISM ONTARIO & PARTNERS

**Role:** Leaders in Indigenous-owned and -led experiences, strategy and support.

**Responsibilities:**

- Deliver authentic Indigenous tourism
- Steward lands and culture
- Support businesses through advocacy, product development, standards, etc.
- Build economic reconciliation pathways

**Relationship:** Partner with TIAO, Destination Ontario, regional actors, and sectoral organizations to ensure culturally respectful development, investment, and promotion.

## NATIONAL SUPPORT ORGANIZATIONS

- Destination Canada – International brand, marketing, product development
- Canadian Destination Leadership Council, Canadian Live Music Association, Hotel Association of Canada, Meetings Mean Business Canada, Restaurants Canada, Sports Tourism Canada, Tourism HR Canada, Tourism Industry Association of Canada, etc. – Sectoral focus, advocacy, capacity building.

## TOURISM SUPPLIERS

- Travel Trade (agencies and tour operators)
- Product suppliers (e.g., food and beverage)
- Services suppliers (e.g., technology, transportation, sustainability)
- Infrastructure (e.g., airports, rail stations)



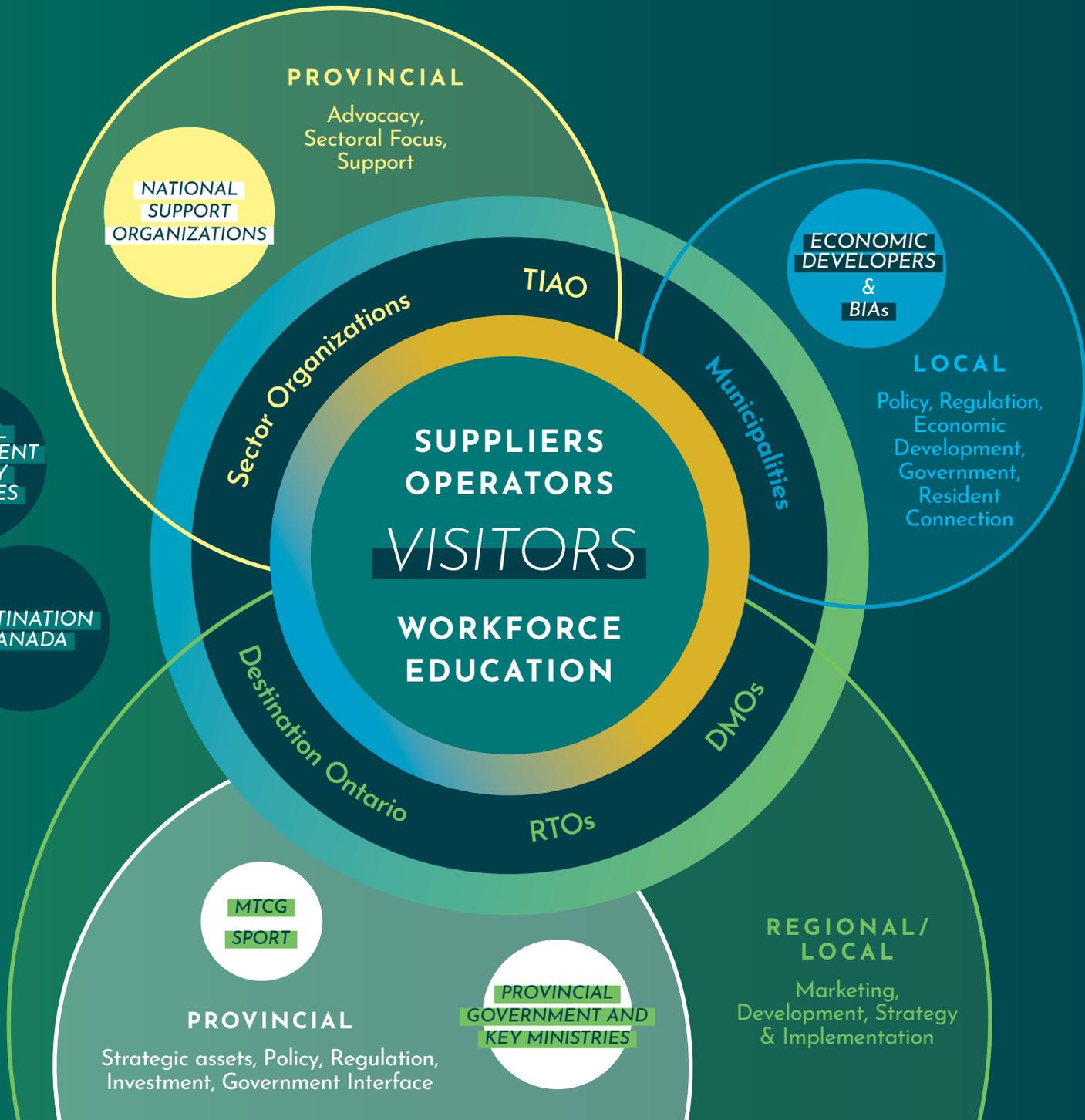
\* For a list of examples of Tourism Sector Organizations, please see Appendix A.

**NOTE:** The diagram to the right illustrates key stakeholders within Ontario's visitor economy ecosystem. At the centre are visitors, tourism businesses and workers, bolstered closely by the education sector as well as a diverse supplier community. These key players service demand and drive direct spending.

A diverse community of support organizations, municipalities, and related entities focus on place-based strategies, product- and service-based strategies, market development and management, policies and regulation, advocacy, direct services, and collaboration. These stakeholders provide capacity-building programs and services to the benefit of operators, suppliers and markets in order to amplify market outcomes and direct spending.

The Provincial Government, Ministry of Tourism Culture, and Gaming as well as key ministries provide direct tourism and tourism-related investments, operate key capacity-building and service-delivery agencies, and create policies and regulations to improve infrastructure, business conditions and growth at local and regional levels (e.g., local transportation, licensing, education, municipal planning) as well as consumer protection.

The Federal Government and its ministries also provide direct tourism and tourism-related investments, operate agencies and create policies and regulations at a more macro level (e.g., immigration, international trade agreements, national transportation) to improve infrastructure, business conditions and growth. National associations connect provincial and territorial support organizations and their stakeholders with national and international trends, as well as policy development and advocacy.



# TOURISM SEGMENTATION & ACTIVATION

The following list represents a strategic tourism segmentation and positioning framework – a multi-dimensional lens through which Ontario’s tourism industry understands, organizes, and activates its assets, audiences and opportunities. It captures examples of the breadth of who visits, why they travel, what they consume, where they go, and how they behave – creating a shared vocabulary for product development, marketing, investment, and policy design.

- **Travel Purpose:** Leisure, Visiting friends and relatives (VFR), Business/Corporate, Meetings/Conferences/Events, Study, Medical, Cultural, Volunteer
- **Product Categories:** Accommodations, Arts & Culture, Culinary & Agri-, Events, Faith, Festivals, Film & Screen, Gaming, History/Heritage, Indigenous, Outdoor & Adventure, Rural & Small Town, Shopping, Spas & Wellness, Sport, Transportation, Urban/Nightlife, Visitor Services, Waterfront/Lake, etc.
- **Visitor Market Mix:** Local & near market/day visits, Ontario domestic, Canada domestic, U.S. (short and long haul), Overseas traditional, Overseas emerging etc.
- **Geographic Mix:** Gateway cities, Mid-sized cities, Rural and remote communities, Northern Ontario, Waterfront/cottage country, Border communities, Cultural districts, Tourism zones, Provincial parks & Wilderness corridors, etc.
- **Trends & Behaviours:** Sustainable/regenerative, Solo, Multigenerational, Digital Nomadism, Experiential, Micro-cation, Last-Chance, Slow, etc.
- **Demographics:** Seniors, GenX, Millennials, GenZ, Families w young children, Multigenerational families, 2SLGBTQ+, Cultural and New Canadian Communities, Affinity/Interest based groups (e.g., Cycling, birding), Neurodivergent and differently abled travelers, Students and youth, etc.
- **Seasonality:** Summer, winter, spring, fall, shoulder
- **Outreach Channels and Services:** Travel trade (agencies and sales, tour operators, etc.)
- **Strategic Collaborations & Opportunities:** E.g., corridors, hubs & spokes, sectoral packages and stories, Major events, etc.

While the focus of Ontario’s Strategic Tourism Playbook is foundational, these dynamics come into play throughout each strategic pillar and will be more deeply activated throughout implementation activities.

# A STRATEGIC PLAYBOOK FOR ONTARIO'S TOURISM INDUSTRY



Informed by extensive consultation, regional insights, and lived experiences across the province, the following action framework presents a united response to the challenges and aspirations of communities, businesses, and institutions. It acknowledges the complexity of Ontario's tourism landscape, stretching from urban corridors to remote northern communities, while also calling for greater alignment, investment, and adaptability. This plan is a forward-facing blueprint designed to foster a stronger, more cohesive visitor economy.

# VISION

To strengthen Ontario's position as a **world-leading** tourism destination that enriches the lives of **residents and visitors** alike by fostering collaboration, supporting a resilient workforce, advocating for strategic investment, and boldly charting a path toward **long-term competitiveness and growth**.

## STRATEGIC PILLARS

### Overview

At the heart of Ontario's Strategic Tourism Playbook lies six strategic pillars, and each pillar captures a distinct but interconnected domain of tourism development, responding to pressing needs, emergent trends, and long-term structural opportunities. They are not listed in rank order. Rather, together they form a comprehensive playbook for policy, planning, and funding that reflects both regional specificity and provincial ambition. They acknowledge that visitor experience cannot be separated from infrastructure, labour, or sustainability, and that a healthy tourism system is one built on mutual reinforcement.

Specific actions are identified under each pillar. By anchoring goals in concrete action items and tested tactics, the framework shifts implementation from theory to practice. It provides the operational clarity that local actors, sectoral organizations, and public agencies require to take the next step, whether that be building a new product, launching a regional campaign, or reforming a regulation.

This plan also signals a deliberate and timely shift in governance philosophy. No single entity can, or should, own the future of tourism in Ontario. Instead, this framework promotes a hybrid leadership model: provincial ministries set enabling conditions and make strategic investments; Destination Ontario leads brand storytelling and data; TIAO and sector partners carry the sector's voice in policy; RTOs and DMOs support and deliver locally; and operators, suppliers, educators, and communities activate the ground truth of tourism. What emerges is a functional, multi-tiered system of leadership defined by collaboration rather than control, and by clarity rather than duplication.

In the pages ahead, each pillar unfolds into a series of structured action items and implementation pathways that reflect this integrated, province-wide approach. With collective will and shared leadership, this plan provides the architecture for the next era of Ontario's tourism success.

The plan for implementation uses a phased timeline framework to guide the rollout of strategies across Ontario's tourism system, based on its complexity, stakeholder readiness, and role in supporting sector transformation. These timeframes are applied consistently across all pillars to reflect the natural pacing of policy, infrastructure, and workforce change. Rather than imposing fixed deadlines, the timeline model provides a structured yet flexible approach that supports adaptive implementation, regional variation, and long-term alignment across the tourism ecosystem. The Foster Collaboration and Leadership strategic pillar outlines further collaborative implementation levers, including targeted committees, task forces, and metrics.

# STRATEGIC GOALS & OBJECTIVES

## 1 ATTRACT MORE VISITORS & SPENDING

Ontario's tourism sector has emphasized the importance of aligning marketing efforts across local, regional, and provincial levels. Stakeholders highlighted the need for a coordinated strategy that leverages Destination Ontario's brand leadership while empowering regional actors like DMOs and RTOs to tell compelling, locally rooted stories. This pillar supports a model where centralized brand strategy coexists with community-driven implementation, ensuring both visibility and authenticity. The sector strongly favours a hybrid model of leadership: The Ministry and Destination Ontario setting direction, with RTOs, DMOs, and tourism operators acting as on-the-ground implementation partners. Sector organizations are also seen as essential collaborators, providing thematic depth and helping unify the province's diverse offerings under shared narratives.

### GOAL:

**Strengthen Ontario's global tourism presence; facilitate provincial, regional and sectoral market development, planning and collaboration.**

### ACTIONS/OUTCOMES:

1. Form an international (U.S. and Overseas) marketing task force to include DO and aligned RTOs, DMOs, and Sectors. (Y1)
2. Develop and implement a collaborative 5-year international (U.S. and Overseas) marketing roadmap. (Y1-5)
3. Facilitate annual marketing planning activities & resources among DO, RTOs, DMOs, Sector Organizations to identify and prioritize market opportunities & to foster collaboration. (Y1-5)
4. Attract more domestic and international events (e.g., sport, business) to support all markets. (Y1-5)
5. Build operator capacity to attract and service international markets. (Y2-3)
6. Create provincial tourism marketing fund stimulating multi-partner projects that attract international visitors. (Y2)
7. Advocate for MAT regulation updates as well as share best practices to improve efficiency and effectiveness. (Y1)

### KEY ROLES:

**Lead/Facilitate:** Destination Ontario, TIAO

**Participate:** RTOs, DMOs, Sector Organizations, Demand Drivers, Arts & Culture, Travel Trade, Marketing Suppliers

**Support:** MTCG, Destination Canada

## 2 EXPAND TRANSPORTATION INFRASTRUCTURE

Access and mobility were major themes across the community consultation process. Stakeholders consistently pointed to transportation gaps, especially in rural and northern regions, as a critical barrier to tourism growth. Poor connectivity limits both domestic travel and the ability to welcome international visitors, particularly in areas with high potential for eco- and cultural tourism. This pillar responds directly to concerns about inequitable access to tourism destinations, the opportunity to reduce car dependency, and the growing demand for sustainable travel options. Strong collaboration between the Ministry of Transportation, municipalities, and economic development offices will be essential, with TIAO playing a key role in coordinating sector feedback and advocating for tourism-specific transportation needs.

### GOAL:

**Improve access and mobility to strengthen Ontario's tourism economy, and advance sustainability.**

### ACTIONS/OUTCOMES:

1. Create cross-ministry, cross-sectoral task force to ensure inclusion of tourism considerations in transportation planning. (Y1)
2. Develop unique northern and remote access and mobility strategy with key stakeholders, including Indigenous communities. (Y2)
3. Develop visitor support platforms and tools, i.e., Ontario trip planning app to improve information, navigation, & trip planning. (Y2-3)
4. Identify, advocate for, and invest in initiatives to: expand inbound access to Ontario (U.S., overseas, domestic), & connect regions within Ontario (gateways, hubs, rural areas, and attractions). (Y2-5)
5. Develop & promote "green travel routes/corridors" aligned with current & future EV infrastructure investment. (Y2-5)

### KEY ROLES:

**Lead/Facilitate:** Transportation Sector (all modes) and related sector organizations, RTOs, DMOs, Municipalities

**Participate:** Sector Organizations, TIAO, Operators

**Support:** MTCG, Ministry of Transportation, Municipalities Associations (e.g., AMO, ROMA, FONOM, NOMA), EDCO, federal transportation ministries/regulators

## 3 STRENGTHEN WORKFORCE RESILIENCE

The resilience of Ontario's tourism workforce emerged as one of the most urgent and cross-cutting challenges raised by stakeholders across all regions and sectors. Widespread labour shortages, high turnover, and systemic barriers, such as limited housing, mobility, or career development, are straining operators and undermining visitor experiences. Yet consultations also revealed significant appetite for long-term, values-driven solutions that treat workforce development not as an operational burden, but as a strategic asset. Stakeholders called for a mix of policy leadership, targeted supports, and cultural change to reframe tourism work as purposeful, sustainable, and inclusive. This pillar reflects the sector's commitment to building a thriving, well-supported workforce that is future-ready and locally rooted.

### GOAL:

**Build a stable, skilled, and future-ready tourism workforce by addressing structural barriers, improving job quality, and shifting perceptions.**

### ACTIONS/OUTCOMES:

1. Coordinate tourism workforce planning across labour, secondary and post-secondary, industry & government (Y1)
2. Expand access to and delivery of paid, hands-on, in-house, short-term, and in-demand skills training programs. (Y1)
3. Develop and deploy storytelling campaign to youth, newcomers, and career changers highlighting growth, purpose & success in industry. (Y2-3)
4. Deliver Tourism HR best practices to operators, e.g., new technology, new seasonal staffing & compensation models. (Y2-3)
5. Develop tools/platforms/incentives to increase co-op and internship opportunities by employers. (Y2-3)

### KEY ROLES:

**Lead/Facilitate:** RTOs, Sector Organizations, TIAO, OTEC

**Participate:** Ministry of Labour, Immigration, Training and Skills Development (MLITSD), Education, Ministry of Colleges, Universities, Research Excellence, and Security, DMOs, Municipalities, Operators, Training Organizations, Secondary & Post-Secondary schools, CGLCC, ORHMA, Workforce Services Organizations

**Support:** MTCG, Tourism HR Canada

## 4 FACILITATE PRODUCT DEVELOPMENT & CAPACITY INVESTMENT

Throughout the consultations, operators and sector leaders expressed a clear desire for support that goes beyond short-term planning and instead facilitates long-term tourism capacity in all markets. Respondents emphasized that while passion and creativity are abundant in Ontario's tourism sector, many businesses, especially small, seasonal, and culturally significant ones, lack the structural supports, access to investment, and hands-on training to develop compelling visitor experiences year-round. Moreover, stakeholders stressed that product development must be rooted in local identity, community character, and inclusive opportunity. From infrastructure to mentorship, digital tools to policy reform, this pillar outlines the multifaceted approach required to foster innovation, expand offerings, and strengthen tourism ecosystems across the province.

### GOAL:

**Expand 4-season tourism capacity across Ontario as well as among Indigenous tourism operators through investment attraction, capacity building, and innovation.**

### ACTIONS/OUTCOMES:

1. Develop province-wide investment attraction plan/pipeline map, and best practices and tools (gateways, hubs, emerging, and rural markets) for industry. (Y1)
2. Help operators discover and invest in technology platforms & smart tools to improve the booking and visitor experience. (Y1)
3. Offer product development and market readiness training and programs for operators. (Y1-3)
4. Advocate for levers to incentivize investment (tax credits, loans, regulatory barriers to building). (Y2-3)
5. Provide resources to ITO to facilitate Indigenous-led tourism investment, capacity building, and marketing. (Y2-4)

### KEY ROLES:

**Lead/Facilitate:** RTOs, Sector Organizations, DMOs, ITO, TIAO

**Participate:** Municipalities, Operators, Arts & Culture, EDCO

**Support:** MTCG, economic development-related ministries, FedDev Ontario, FedNor Ontario, Invest Ontario, Invest Canada

## 5 ADVANCE PRACTICAL SUSTAINABILITY

Consultations across Ontario's tourism sector revealed a strong consensus: sustainability is not optional, it is essential. However, stakeholders emphasized that for sustainability to take root, it must be practical, affordable, and tailored to the diverse realities of tourism operators, especially those in rural and northern communities. Many operators already understand the value of sustainable practices, but lack clear, coordinated support to act on that intent. There is a significant appetite for tools, incentives, and training that can translate sustainability from an abstract ideal into everyday business practice. This pillar presents an actionable roadmap grounded in flexibility, voluntary uptake, and strategic alignment aimed at making sustainability a competitive advantage and a shared provincial priority.

### GOAL:

**Make sustainability a practical, competitive, and accessible foundation for Ontario's tourism future.**

### ACTIONS/OUTCOMES:

1. Launch tourism sustainability task force & advocate for practical incentives not mandates. (Y1)
2. Expand industry participation in certification assessments, simplifying & bringing down costs. (Y1)
3. Create sustainability toolkits for operators (energy efficiency, waste & water reduction, local/domestic sourcing, climate adaptation, social justice). (Y2)
4. Drive sustainable product development & marketing activities through test pilots to stimulate consumer demand. (Y2-3)

### KEY ROLES:

**Lead/Facilitate:** TIAO, Sector Organizations, RTOs

**Participate:** DMOs, Municipalities, Operators, Greenstep, Suppliers

**Support:** MTCG, DO, environment-related ministries, FedDev Ontario, FedNor Ontario

## 6 FOSTER COLLABORATION & LEADERSHIP

Consultations across Ontario’s tourism sector revealed that one of the most persistent barriers to effective policy and program delivery is not a lack of ideas but a lack of structural clarity. Confusion over who leads, who decides, and who implements has often led to duplication, miscommunication, and frustration. Stakeholders consistently called for a clearer, more collaborative leadership model, one that empowers trusted institutions like TIAO, Destination Ontario, and the Ministry, while embedding delivery responsibility in place-based partners like RTOs, DMOs, municipalities, and sector organizations. This pillar addresses those calls by laying out a shared governance framework that balances centralized strategic vision with regional, sectoral, and local autonomy. Leadership in this context means coordination, clarity, and collective accountability.

### GOAL:

**Build a high functioning, coordinated tourism system through clarified roles, inclusive governance, and shared accountability.**

### ACTIONS/OUTCOMES:

1. Form an **Ontario Tourism Strategy Alignment Council** – gather consensus, problem solve, assess. **(Y1)**
2. Recruit support organizations and operators to participate in **Strategic Implementation Teams** to drive key actions/outcomes. **(Y1)**
3. Create online portal/info sessions to educate & clarify key roles/responsibilities, common data platform, & report results. **(Y1-5)**
4. Use Ontario Tourism Summit to share progress and stimulate sectoral planning and participation for proceeding fiscal year. **(Y1-5)**
5. Facilitate focused **Idea Summits** to engage operators, supplier community, support organizations, academia, government, etc. to drive innovation and generate new ideas. **(Y2-5)**

### KEY ROLES:

**Facilitate:** TIAO

**Participate:** RTOs, DMOs, Sector Organizations, Operators, Government Representatives, EDCC, OCC

**Support:** MTCG, DO, Key Supplier Partners, National Industry Associations, Statistics Canada

# STRATEGIC TARGETS

Ontario’s tourism sector is on a path to recovery—but recovery alone isn’t enough. To secure long-term prosperity, Ontario must set an ambitious, achievable target: **4% year-over-year growth in visitor spending** through 2030.

Without coordinated action, the province is likely to maintain a modest 2% annual growth rate. Under that scenario, visitor spending would reach just \$33.9 billion by 2030—an improvement, but one that falls short of Ontario’s true potential. More concerning, the combination of automation, cost pressures, and stagnant investment could result in a decline in direct tourism jobs—from 290,000 in 2025 to 278,000 by decade’s end.

That is not the future this strategy envisions.

With the right tools and strategic alignment, Ontario can unlock an additional 2% in **opportunity-driven growth**, reaching a total of **\$38.1 billion in visitor spending** by 2030. This scenario not only generates an additional \$4.2 billion in revenue but also increases direct tourism employment to **313,000 jobs**—creating economic resilience and opportunity across communities.

**This 4% growth target is the cornerstone of Ontario’s tourism strategy.** It reflects the province’s ambition to lead nationally, compete globally, and build a visitor economy that works for everyone. Key metrics are as follows:

METRIC	2025	2030 (2% GROWTH)	2030 (4% GROWTH)	DIFFERENCE
Visitor Spending	\$30.7B	\$33.9B	<b>\$38.1B</b>	+\$4.2B
Total GDP Impact	\$29.7B	\$33.0B	<b>\$39.3B</b>	+\$6.3B
Direct Tourism Jobs	290,000	278,000	<b>313,000</b>	+35,000 jobs
Total Tax Revenue	\$11.0B	\$12.2B	<b>\$13.7B</b>	+\$1.5B

**Note:** Projections are based on an economic forecast model developed by Context Research Group Inc. which utilizes historical Ontario tourism data from 2012 through 2022 provided by the Ministry of Tourism, Culture, and Gaming and Statistics Canada.

# KEY PERFORMANCE INDICATORS

The following represent additional key performance indicators to assess performance of activities identified to advance strategic pillars:

## ATTRACT MORE VISITORS & SPENDING:

- **Total Visitor Spending in Ontario:** Track annual visitor expenditures to monitor growth in the tourism economy.
- **International Visitor Arrivals:** Measure the number of international tourists to assess global market penetration.
- **Hotel Occupancy Rates:** Monitor average occupancy rates as an indicator of tourism demand and seasonality.
- **Net Travel Balance:** Total inbound visitor spending from a given market minus Outbound spending by Ontario residents in that same market.

## EXPAND TRANSPORTATION INFRASTRUCTURE:

- **Number of Direct Air Routes to Ontario:** Count of direct international and domestic air routes to Ontario airports.
- **Public Transit Accessibility to Key Attractions:** Percentage of major tourist attractions accessible via public transit.
- **Investment in Tourism-Related Infrastructure:** Annual public and private investment in transportation infrastructure supporting tourism.
- **Net Promoter Score of Public Transit:** Measure visitor satisfaction with Ontario's public transit infrastructure.

## STRENGTHEN WORKFORCE RESILIENCE:

- **Tourism Sector Employment Numbers:** Total number of individuals employed in Ontario's tourism sector.
- **Job Vacancy Rates in Tourism Industry:** Percentage of unfilled positions within the tourism sector, indicating labor shortages.
- **Participation in Tourism Training Programs:** Number of individuals completing certified tourism and hospitality training programs annually.
- **Competitiveness of Tourism Industry Wages:** Benchmark mean and median wages against similar industries.

## FACILITATE PRODUCT DEVELOPMENT & CAPACITY INVESTMENT:

- **Number of New Tourism Products Launched:** Count of new tourism experiences or products introduced annually.
- **Visitor Satisfaction Scores:** Average satisfaction ratings collected through post-visit surveys.
- **Investment in Tourism Development Projects:** Total annual investment in developing and enhancing tourism products and experiences.

## ADVANCE PRACTICAL SUSTAINABILITY:

- **Percentage of Tourism Businesses with Sustainability Certifications:** Proportion of tourism operators holding recognized environmental or sustainability certifications.
- **Carbon Footprint of Tourism Sector:** Annual measurement of greenhouse gas emissions attributed to tourism activities.
- **Waste Reduction Initiatives Participation:** Number of tourism businesses participating in waste reduction or recycling programs.

## FOSTER COLLABORATION & LEADERSHIP:

- **Stakeholder Engagement Sessions Held:** Number of meetings or forums conducted to engage tourism stakeholders from different regions within Ontario in collaborative planning.
- **Partnership Agreements Signed:** Number of formal agreements established among stakeholders to achieve strategic goals.
- **Policy Advocacy Success Rate:** Percentage of TIAO's and Sector Organizations' policy recommendations adopted by government bodies.

## IMPROVE VISITOR EXPERIENCE:

- **Overall Visitor Satisfaction Score:** Aggregated satisfaction rating across key domains.
- **Experience Net Promoter Score (eNPS):** Likelihood of a visitor recommending Ontario to others on their full experience.
- **Repeat Visitation Rate:** Percentage of visitors who return or are likely to return within 12 or 24 months—a proxy for emotional connection and satisfaction.
- **Trip Planning Satisfaction:** Survey-based score on ease of finding, booking, and planning tourism experiences.



# APPENDIX A

## SAMPLE OF ONTARIO'S TOURISM SECTOR ORGANIZATIONS

- Agritourism Ontario
- Airport Management Council of Ontario (AMCO)
- Attractions Ontario
- Boating Ontario Association
- Camping in Ontario
- Canadian Cannabis Tourism Alliance (CCTA)
- Culinary Tourism Alliance (CTA)
- Festivals & Events Ontario (FEO)
- Greater Toronto Hotel Association (GTHA)
- Indigenous Tourism Ontario (ITO)
- Kenora Hospitality Alliance
- Kingston Accommodation Partners
- Large Cycle Association of Ontario
- Nature and Outdoor Tourism Ontario (NOTO)
- Niagara Falls Canada Hotel Association (NFCHA)
- Ontario by Bike
- Ontario Craft Brewers
- Ontario Craft Cider Association
- Ontario Arts Council (OAC)
- Ontario Federation of All Terrain Vehicles (OFATV)
- Ontario Motor Coach Association (OMCA)
- Ontario Restaurant Hotel & Motel Association (ORHMA)
- Ontario Snow Resorts Association (OSRA)
- Ontario Tourism Education Corporation (OTEC)
- Ontario Trails Council
- Ottawa Gatineau Hotel Association (OGHA)
- Ottawa Valley Tourist Association (OVTA)
- Resorts of Ontario
- Toronto Attractions Council
- Wine Growers Ontario
- Wines of Ontario

# APPENDIX B

## NAMES & TERMS

- **AMO** – Association of Municipalities of Ontario
- **BIA** – Business Improvement Area
- **CDLC** – Canadian Destination Leadership Council
- **CGLCC** – Canada's 2SLGBTQI+ Chamber of Commerce
- **CRG** – Context Research Group
- **DC** – Destination Canada
- **DMO** – Destination Marketing and Management Organization
- **DO** – Destination Ontario
- **EDCO** – Economic Developers Council of Ontario
- **FedDev Ontario** – Federal Economic Development Agency for Southern Ontario
- **FedNor** – Federal Economic Development Agency for Northern Ontario
- **FONOM** – Federation of Northern Ontario Municipalities
- **GDP** – Gross Domestic Product
- **MAT** – Municipal Accommodation Tax
- **MLITSD** – Ministry of Labour, Immigration, Training, and Skills Development
- **MMBC** – Meetings Mean Business Canada
- **MS** – Ministry of Sport
- **MTCG** – Ministry of Tourism, Culture, and Gaming
- **NOMA** – Northwestern Ontario Municipal Association
- **OCC** – Ontario Chamber of Commerce
- **RC** – Restaurants Canada
- **ROMA** – Rural Ontario Municipalities Association
- **RTO** – Regional Tourism Organization
- **THRC** – Tourism HR Canada
- **TIAC** – Tourism Industry Association of Canada
- **TIAO** – Tourism Industry Association of Ontario

Facilitated by



# FORWARD MOTION

A STRATEGIC PLAYBOOK FOR  
ONTARIO'S TOURISM INDUSTRY  
2025-2030

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