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Contents

List of Acronyms	2
Executive Summary	2
1. Sector Overview	3
TIAC’s Mission, Vision, Goals and Objectives and Past Success	3
TIAC and Destination Canada	5
The Tourism Industry and its Importance in Canada	5
State of the Sector: Trends and Outlook	5
Members and Key capabilities	6
Competitive Position.....	6
Progress and Lessons learned.....	7
2. Subsectors that will be focused on and reasons for their selection	9
Target Markets.....	9
Other Markets.....	10
3. Target Customers	10
4. Strategic Priorities	11
Strategic Objectives and Desired Outcomes.....	11
Short term objectives (1-1.5 years)	11
Medium-term objectives (1.5 -3 years)	12
Longer term/ ongoing objectives (2-3 years +).....	12
Suggested Tactical Actions	13
Long term: India, Mexico and Brazil Markets.....	14
5. Measurement of Results	14

List of Acronyms

- CNTA - National Tourism Administration of China
- DMO- Destination Marketing Organization
- MICE – Meetings, Incentive, Conventions and Events
- TIAC – Tourism Industry Association of Canada
- RTO- Receptive Tour Operators
- MICE – Meetings, Incentive, Conventions and Events
- VACs – Visitor Application Centers
- YTD – Year-to-date
- DC – Destination Canada

Executive Summary

This International Business Development Strategy (IBD) builds on our most recent IBD strategies but also takes into account the new information gleaned from TIAC's work to date, and expanded market interests.

Internationally, the tourism industry is booming and there are unprecedented opportunities for economic growth in both emerging markets such as China, India, Brazil and Mexico as well as our traditional markets in the United States and Europe. Canada has seen gains in these markets over the last few years, with international arrivals increasing by 3.2% in 2014. However, in the last five years, our share of our biggest international market – the United States – has failed to grow at the same pace. In the early 2000's, 28% of U.S. outbound travel was to Canada, but by 2009, the proportion of Americans travelling to Canada declined to about 18%. The 12 million American visitors to Canada in 2013 represented 19% of total U.S. outbound visitation and a decline of about 4 million since 2002. However, opportunities are arising to help change this reality. The American economy is now recovering from the recession, more Americans than ever have passports (122 million), and travel intentions are high. A recent investment of \$30 million over three years by the federal government to work with industry to market Canada in the U.S. has invigorated businesses in the industry, who are hoping to bring these visitors back. With conditions improving in the U.S. (economic recovery, currency exchange and passport ownership) we will focus our attention on helping our members recapture a competitive share of the lucrative U.S. market.

As in past years, Chinese tourism to Canada remains essential to the growth of tourism. With a population of 1.3 billion people, China is an important target market for Canada. TIAC has built on the foundation created by the ADS agreement (2010) and its trade mission to China (2013) to help the industry increase business with our most important emerging market. TIAC's trade mission to China provided valuable experience in leading and planning trade missions. We seek to capitalize on this experience and continue to provide the industry with

more access to trade opportunities. As a result of the success of the ADS agreement, and the newly established 10 year multiple entry visa for Chinese visitors, TIAC is making important inroads into this market. However, with Visitor Application Centres (VACs) in only a small number of cities, Canada is only able to access a small portion of the travel market in China. In addition to advocating for more VACs in China, we are looking to access new markets directly through trade missions.

The Tourism Industry Association of Canada (TIAC) aims to support Canadian businesses, Destination Marketing Organizations (DMOs) and Receptive Tour Operators (RTOs) in taking advantage of these new market opportunities by helping industry regain lost U.S. market share and to reach out to emerging markets like China to ensure continued growth. Working closely with Destination Canada, TIAC aims to promote and support outreach efforts to high-yield clients like MICE travellers, and those who are captivated by Canada's rich natural beauty and culture, while helping businesses take advantage of existing resources from both traditional markets (ex. U.S.) and emerging markets (ex. China).

Specifically, in the U.S., we want to target key markets such as those within a four hour drive of the Canadian border, or near airports with one-hop flights to Canadian cities. This will provide the Canadian tourism industry with better access to the U.S. market and enable the sector to more easily attract this demographic to Canada. In China, we will continue to expand our presence in large cities, such as Shanghai, as well as begin to explore smaller (tier 2 and 3) cities, that are experiencing growing international tourism demand.

To reach these international business development goals in the short term, TIAC will continue to organize trade/fact-finding missions to China and begin work in the U.S. through trade shows and leisure sales events. Further, we look forward to hosting a significant number of American delegates to foster more business ties through our highly successful involvement in Rendez-Vous Canada, Canada's biggest travel trade show. We will also continue to share knowledge and insights gained from these activities with the industry. At the same time, we are planning our second official China mission in the fall of 2016.

Looking towards our medium to long term strategy, we will use the success and lessons learned from our Canada/China project and U.S. trade missions to enable TIAC to expand similar efforts to India and Brazil.

1. Sector Overview

TIAC's Mission, Vision, Goals and Objectives and Past Success:

TIAC serves as the national private-sector advocate for the \$88.5 billion Canadian tourism sector. Based in Ottawa, TIAC works on behalf of Canadian tourism businesses and promotes proactive measures that help the industry grow and prosper.

TIAC is responsible for representing tourism interests at the national level, and its advocacy work involves promoting and supporting policies, programs and activities that benefit the sector's growth and development.

TIAC's International Business Strategy aims to help increase international visitation to the country, with an emphasis on capitalizing on the increased travel capacity in the U.S. market and emerging markets such as China, Brazil, India and Mexico. TIAC has been advocating for a re-entry into the U.S. since 2013, when we began our Connecting America campaign– a federal investment to lever matching funds from the tourism sector in a fully-aligned, fully-matched private/public Destination Canada- led national marketing campaign in the U.S. to provide immediate returns to Canada's tourism economy. While TIAC led the advocacy campaign for this program, none of the funds flow to TIAC. Once approved, funds are administered and managed by Destination Canada, Canada's federal marketing Crown Corporation.

TIAC's main goals are to increase Canada's share of the U.S. market by 2.6 million visitors per year by 2020 as well as pursue aggressive growth in China. In order to reach these goals, TIAC has set out a number of objectives:

- 1) Conduct market research with key stakeholders in target markets to better understand the specific needs of those travellers
 - a. Past Success: TIAC partnered with industry to commission market research in the U.S. conducted by the PhocusWright group.
 - b. Past Success: Trade mission to China in 2013 revealed new information and market leads. For example, the emerging MICE market;
- 2) Promote and educate key stakeholders in these markets about Canadian tourism (product, operators and logistical considerations);
 - a. Past Success: Trade mission to China generated over 100 leads and many more contacts;
 - b. Past success: Trade mission to the U.S. for the New York Times Travel Show
- 3) Inform and educate our members on how they can best serve new tourists;
 - a. Past Success: Our report on China and panel presentations at our annual Congress helped inform industry businesses on how to attract and serve Chinese visitors in Canada;
- 4) Identify and work to rectify domestic policy issues that may be hindering the industry's ability to attract foreign visitors.
 - a. Past Success: Including \$30 million over three years committed by federal government for Connecting America marketing campaign in the U.S. led by Destination Canada; movement of low-risk Mexican/Brazilian travellers from visa stream to eTA (pending); extension of the 10 year multiple entry visa to

countries including China & India; and Canada Transportation Act Review to address the high cost of flying in Canada.

TIAC and Destination Canada:

While TIAC and Destination Canada work together as allies in optimizing Canadian tourism, we have separate and clearly distinct mandates. As Canada's national marketer of record, Destination Canada works to generate demand through leveraged investments in the Canada brand with Canadian partnerships. TIAC, on the other hand, works to improve Canada's competitiveness by advocating for policies and regulations to optimize tourism growth in Canada, in addition to supporting its members and industry SMEs in their business development efforts through education, networking and trade missions.

In order to effectively support the industry's expansion into China and re-entry to America, TIAC must work in tandem with Destination Canada to use existing in-market resources, established contacts, relationships and market intelligence to advance Canadian opportunities. Additionally, Canada's current position and marketing investment in the vast U.S. market is just beginning to revive after multiple years of focus on emerging markets. The industry is uniquely poised to attract U.S. visitors in full force. The potential for inbound tourism growth from the U.S. is augmented by Destination Canada and TIAC working together, within our respective mandates, to maximize Canada's share of voice in this important marketplace.

Complementing Destination Canada's work, TIAC aims to promote and support outreach efforts in key markets. TIAC further aims to support Destination Canada's work in other promising emerging markets: Brazil, India and Mexico.

The Tourism Industry and its Importance in Canada:

In 2014 the Canadian tourism industry contributed \$88.5 billion in economic activity across all regions. Tourism is also one of Canada's leading job creators. The industry directly employs over 628,000 Canadians across the country – more than all the jobs created by the oil and gas industry. It spans four seasons and employs everyone from marketing and finance executives and entrepreneurs to entry-level positions for young Canadians.

The breadth of the tourism industry contributes to the diversification of Canada's economy, strengthening not only our domestic economic activities but also our growing reputation as a powerful player in international trade (in 2014, tourism exports were worth \$19 billion).

State of the Sector: Trends and Outlook

Globally, the tourism industry is booming – in 2014 alone, international arrivals exceeded 1.1 billion with tourism receipts reaching U.S. \$1.5 trillion. The majority of current tourism business comes from the U.S. and Europe while the fastest growing outbound markets are

emerging economies like China, Brazil, India and Mexico. While the U.S. outbound traveller market slowed over recent years, it has recently begun to pick up. TIAC supports Destination Canada's balanced strategy of maintaining growth in traditional markets (especially re-entering the U.S. market) and maximizing business opportunities in emerging, high yield markets.

Unfortunately, Canada's share of the global tourism pie is shrinking – while global international arrivals (i.e. all international visitors to all countries) grew 4.3% in 2014, Canada's international arrivals only grew by 3%. In 2002, Canada ranked 7th most visited country in the world, but by 2014, Canada plummeted to 16th place with annual arrival numbers down 4 million. As Canada's reputation and beauty are strong as ever, our loss of market share is due to a number of policy issues including but not limited to marketing support, visitor documentation requirements and aviation costs.

Members and key capabilities

Our members' businesses range from small owner-operator tour guides, to major airlines and hotel chains. We also facilitate national alignment among all travel organizations through our members including Destination Marketing Organizations (DMOs) such as Tourism Toronto and Provincial Marketing Organizations (PMOs) such as Travel Alberta.

In 2010, China granted Canada Approved Destination Status (ADS), allowing Chinese nationals to travel to Canada in a group tour format. ADS travel to Canada by Chinese tour groups is organized by travel agencies designated by the National Tourism Administration of China (CNTA). To be a CNTA-designated RTO in the destination country the company must show it has policies and procedures in place to ensure that Chinese groups have the best possible experience as well as access to Chinese-speaking guides. At the request of the Canadian government, TIAC has undertaken the role of overseeing and registering ADS-approved RTOs. ADS-registered RTOs also play an important role in attracting and organizing MICE travel.

We currently have over 70 registered ADS operators – with high satisfaction rates from clients and the Chinese Government.

With the help of a GOA grant TIAC organized a trade mission program with our first market visit to China in 2013. The mission proved so successful and popular, TIAC is incorporating trade missions and other trade-related components to its permanent activities.

Competitive Position

Canada is blessed with the basics: natural beauty, interesting and sophisticated destinations and a great reputation. This year, the Reputation Institute's annual Reputation Report put Canada back in the number one position for reputation among residents in G8 countries.

With an aggressive strategy in emerging markets we can regain our position as one of the world's most desirable tourism destinations. TIAC can help the industry regain its market share by working to establish relationships with industry players in a number of target markets as well as work to ease logistical and financial challenges for visitors.

Though we saw relatively stagnant growth over the last few years in the U.S. market, we are seeing a resurging interest in Canada. The recovery of the U.S. market, the proximity for travel, and the increasing value of the U.S. dollar make Canada an attractive and good value option for travel.

A survey of potential American travellers commissioned by TIAC and partners in Spring 2014 found that Canada was top of mind for 7% of Americans as a vacation destination – exceeding the desire to visit Disney World and fairing favourably in comparison to New York City. It also found that those who have already visited Canada are most enthusiastic about travel to Canada, indicating a potential for sustained and continual growth when attracting new visitors to Canada.

Canada also continues to enjoy a strong reputation in China. In 2012 and 2013, Canada was ranked number 1 as the most satisfactory outbound destination by the China Tourism Research Institute (part of CNTA).

TIAC can help the industry capitalize on its innate attractiveness by helping Canadian tourism companies and destinations establish relationships with key players in the U.S. and Chinese markets.

Progress and Lessons learned

Though engaging the U.S. market is a new priority for TIAC, our past trade missions to China have given us insight into effectively attracting and recruiting key industry players in target markets. This experience will serve TIAC well in future trade missions back to China, the U.S., and potential missions to Brazil, India and Mexico.

TIAC and industry delegates gained valuable insight during the 2013 trade mission to China – both on the market itself and on the best way to run a trade mission. During the trade mission, we heard from many Chinese stakeholders about barriers to travel to Canada as well as new opportunities, such as the MICE segment. Highlights of the trade mission included:

- Hearing directly from market about barriers to increased visitation to Canada - reaffirming TIAC's advocacy positions on marketing, aviation costs and traveller documentation irritants.
- In addition to great enthusiasm about our products, there was positive feedback on our ADS program and operators, with many of the agents indicating they

considered Canada to be a safe and fair place to do business. Our ADS operators and attractions gained greater insight into the new Chinese travel law which is aimed to protect travellers from shoddy operators and improve the image of Chinese travellers abroad.

- We also learned that MICE travel, particularly incentive travel, is a growing market opportunity in China. Many DMOs and individual operators find it too expensive and futile to effectively market in China alone without being under the well-respected DC brand. However, DC's limited budget in China is a challenge in getting DMO information to a large number of tier 2 and 3 city agents in China. TIAC hopes that future trade missions will assist Canadian businesses establish relationships with agents in secondary markets. It should be noted that increasing the MICE market segment does not mean ADS operators will become obsolete as MICE agents in China use ADS operators in Canada to arrange group travel.

The trade mission itself was a great success with all delegates reporting a greater understanding of the market, increased leads resulting in up to hundreds of thousands of dollars in revenue.

We also have a better idea of how to make our next trade missions even more successful. First, both Chinese stakeholders and participants indicated that the one-on-one meetings were more useful than participation in the trade show. Unexpectedly, what was originally considered to be a weakness (we invited attractions to fill up the trip as GOA grant came too late for many ADS operators), turned out to be a highlight. Both ADS operators and attractions' representatives found their interaction with each other a valuable and profitable experience.

We have very recently completed the first of two U.S. trade shows (New York City & Boston), in which TIAC was granted GOA money from the 2015-2016 supplemental funding rounds. It is too early at this writing to measure the long term impacts of these activities, however initial feedback is positive. The Canada pavilion also won the "Most Interactive" award at the New York Times show in January 2016.

We have applied lessons learned in subsequent trade missions and will continue to do so. For example, we are ensuring that all trade missions include as many one-on-one meetings (B-to-B as well as direct to consumer) as possible in addition to ensuring delegation members have ample time to network with each other. In doing so we aim to increase connections made between attractions, hotels and aggregators such as touring companies. We will continue to gather feedback and lessons learned to form the basis of planning for our upcoming missions to China and the U.S.

2. Subsectors that will be focused on and reasons for their selection

Though we recently began to focus efforts on the U.S. market, our business development strategy continues to include emerging markets. There are a number of areas, specifically in China, that need to be focused on individually. Specifically, MICE and group (especially ADS tours in China) are subsectors with great potential.

Tourism in Canada generates \$19 billion a year in exports. By expanding trade with China, Brazil, Mexico and India as well as the U.S., TIAC will be supporting not only RTOs, destination cities and attractions but also a number of other subsectors including airlines, aerospace, accommodations, hospitality services and attractions.

Target Markets

China

We continue to target China. Globally, Chinese outbound tourists are the fastest growing group of travellers. In 2012, Chinese travellers took over 117 million outbound trips. China has overtaken USA and Germany as the world's number one source of tourists. The Chinese market has proven potential for Canada: visitors increased by 30% in 2014 with each visitor spending on average \$1,777 per trip (2012 data).

Despite some signs that the market is maturing (e.g. year to date visitation growth is 8.9% in 2015, compared to 30.4% for the same period in 2014), there is still growth potential in this market. A 2011 study by the Canadian Tourism Commission stated that 56% of Chinese travellers would "definitely" or "very likely" visit Canada in the next two years. While encouraging for Canada, we are lagging behind our competitors in attracting Chinese visitors. For example the USA saw almost double our growth (35%) in 2012, reaching 1.4 million visitors (compared to 273,000 for Canada).

U.S.

In the US, our international business strategy aims to provide more access for Canadian tourism businesses. Businesses across Canada have suffered from a downturn in visitation from the United States, which in the past has made up the lion's share of international visitors. This was in part due to the high Canadian dollar, but also due to a lack of consumer knowledge of what Canada has to offer. We need to encourage small businesses to export their product to the U.S., which has tremendous growth potential. We also see the U.S. with its similarities to Canada as a great on-ramp for global exporting for industry SMEs. This will be done through targeting areas with airports that have direct flights to Canada, and areas within a few hours' drive of the border.

Despite past setbacks, 2015 has been a turnaround year for U.S. visitation to Canada. Between January and July of 2015, visitation from the U.S. is up 9.3% over last year. Reaching out to the U.S. market will be crucial in maintaining this positive momentum.

MICE Markets from China

During TIAC's trade mission to China, we heard from many Chinese stakeholders that MICE travel, particularly incentive travel, was a growing market opportunity. A survey by Insignia commissioned by Destination Canada supports this view showing a 300% increase in MICE travel to Canada from China compared to 2007. This market segment is now worth around \$28 million. The survey found high levels of interest in Canada: 45% of meeting and convention planners and 38% of incentive planners would like to plan a trip to Canada in the next year. In fact, amongst MICE destinations outside the Asia region, Canada was considered the most attractive. Achieving ADS status has helped Canada's attractiveness for this type of travel as Chinese group travel must use ADS-approved RTOs.

The study also identified a number of barriers to tapping into this market including "a lack of familiarity with potential Canadian meeting venues." The study found that the best way to approach Chinese buyers is through one-on-one meetings and business lunches. Canada would be remiss to not capitalize on these opportunities to welcome more Chinese travellers.

In emerging markets, we have observed that MICE travel to a destination usually follows "visiting friends and relatives" and group travel. We predict that as Brazilian, Indian and Mexican markets mature, MICE travel will increase.

While we must maintain our efforts in the leisure travel subsector, we aim to explore MICE opportunities in emerging destinations.

Other Markets

Brazil, India and Mexico also promise great opportunities according to year-to-date 2015 data. Take Brazil for example: Brazilian visitation grew 15.4% YTD. Data from 2012 shows spending surged 9.1% to \$152 million. Brazilian travellers visited on average 19.5 days, spending \$1,941 per trip – the highest amount among Destination Canada's key markets. We have also seen continued growth in Indian visitation following a small decline in 2012 (due mostly to the cancellation of direct air service that year). In 2015 YTD, arrivals from India increased 9.3% and the market is poised to grow even more with the reinstatement of a direct Canada-India flight in November 2015. Finally, Mexico is beginning to rebound from the visitor visas imposed by Canada in 2009, growing at a steady 12%. Spending was up almost 10% to just under \$200 million – with each visit yielding around \$1,480 in 2012. With new developments in the use of the CAN+ program and eTA for some low-risk travellers from Mexico, we expect these numbers to increase even further in the coming years. TIAC intends to continue with the "TIAC Trade Mission Program" which will likely cover India, Mexico and Brazil in future years.

3. Target Customers

In China, all outbound tourism traffic and travel policy is controlled by the CNTA; it is therefore critical that TIAC develop connections with companies that are approved by the CNTA. Key stakeholders in the Chinese market include CNTA-designated travel agencies and tour operators, senior China Tourism Association (CTA) and China Association of Travel Services (CATS), officials, foreign affairs officials in targeted Chinese provinces and municipalities and senior Chinese officials in immigration and trade departments. Here, in addition to promoting our tourism products and ADS operators, we will be focusing on the MICE travel segment.

In the U.S. market we will continue to promote trade through B-to-B and B-to-C trade shows, making our primary targets buyers who will promote Canada as a desirable destination to prospective travellers. This will be done through an expansive effort to market all of Canada's best travel experiences through Team Canada marketing. This will allow tourism businesses to form partnerships and connections to attract desired clients.

In other markets such as Brazil, Mexico and India, we aim to target outbound travel agencies, outbound tour operators, airlines and senior government officials for meetings as well as information sharing such as panels at the Tourism Congress.

4. Strategic Priorities

Strategic Objectives and Desired Outcomes

The desired outcome of TIAC's International Business Strategy is to support the tourism industry by helping to create demand for Canada in international markets, understanding existing barriers and helping to facilitate the logistics of bringing tourists into the country.

In 2012 and 2013, TIAC developed a number of specific objectives to achieve these goals in the Chinese market. We have updated and adjusted them according to new information gathered during our trade mission to China, as well as expanded on our strategy for the U.S. market:

Short term objectives (1-1.5 years)

- With input from Destination Canada, TIAC is developing the "Path 2 Export" program, which matches industry businesses with the tools and knowledge they need to begin attracting customers from target markets. This program will include informational videos, surveys, and educational tools linking them to existing resources for trade development;
- Support trade missions and research into U.S. market in order to help SMEs participate in Connecting America campaign
 - Moving forward: Create educational materials on how to best participate in the Connecting America campaign

- Work to promote businesses through international trade shows in the U.S. market, and building relationships with travel trade businesses that can target our core U.S. customers.
 - Outcome: Tourism businesses will gain opportunities to engage the U.S. market through various trade show opportunities in 2016 and beyond;
- Conduct market research on the cultural, regulatory and economic realities in China to educate Canadian tourism operators on how to meet expectations of visitors from these countries.
 - Completed: Host China panel at the Tourism Congress to give Canadian businesses a snapshot of the opportunities that exist in these countries. (December 2, 2015)
 - In China, stakeholders can include CNTA-designated travel agencies and tour operators, senior Chinese officials in the CNTA, CTA, and CATS in targeted Chinese provinces and municipalities and senior Chinese officials in immigration and trade departments;
 - Outcome: Chinese visitation continues to grow in addition to gains made in India, Mexico and Brazil.

Medium-term objectives (1.5 -3 years)

- Increase number of American visitors to Canada by at least 2.6 million by 2020
- Encourage participation in the Connecting America campaign by tourism businesses, in order to encourage industry participation to the fullest potential by the end of the 3 year funding period (2015-2018);
- Continue to grow number of visitors from China, specifically MICE travellers and groups via the ADS program;
- Increase number and quality of Canadian RTOs registered with the ADS program (NB program has increased from 38 to 60 operators since China mission in 2013);
- Continue to advocate for funding to increase the marketing capacity of the industry and Destination Canada;
- Continue to use lessons learned in China to inform a trade mission strategy to boost Brazil, Mexico and India numbers.

Longer term/ ongoing objectives (2-3 years +)

- Analyse successes of two China missions to apply similar tactics and objectives to other emerging markets such as Brazil, Mexico and India within the next 5 years.
- Continue to support member engagement in the U.S. market initiative through education, trade support (i.e. missions) and advocacy at the federal level.

- Continue to build on market intelligence and networks gained from our work in China to help our industry target the Chinese market through continuous information sessions and research publications.

Suggested Tactical Actions

China

In the case of China, TIAC needs to understand the regulatory barriers to travel that Chinese visitors face so it can work with both governments to facilitate processes. Additionally, an appreciation of cultural nuances will help Canadian tourism stakeholders provide the best product possible. This knowledge is best gained from relationships developed with Chinese stakeholders.

- Despite the impressive increase of ADS operators registered with TIAC from 38 in 2013 to 60 in 2015, we will strive to achieve even greater growth.
- Trade missions for TIAC CEO, key attractions and ADS-operators to meet with Chinese stakeholders to promote Canada and to better understand market needs.
 - Achieved: Successful 2013 mission;
 - Ongoing: Future trade missions focusing on new cities and MICE segment.
- Market Research on difficulties or perceived difficulties travelling to Canada.
- Session on understanding the Chinese market at TIAC's annual Congress
 - Achieved: China session at 2013 and 2015 Congress;
 - Ongoing: China workshops at DC/TIAC Tourism Town halls which are held in smaller cities across the country every year.
- Welcome document for Chinese tourists with general information such as hints on cultural differences to help them fully enjoy their visit and to demonstrate to CNTA officials that ADS operators in Canada are committed to providing safe, fun and caring vacations. This document will reflect Sec. 10 of the new Chinese law: "Tourists shall respect public order and social morality in public activities."
 - Achieved: Handbook was released March 2014, positive feedback from ADS operators.
- Chinese media outreach: earned media to help Chinese visitors, outbound operators and CNTA officials to understand the logistics of travel to Canada
 - Achieved: \$2.7 million in Chinese travel media hits from 2013 media availability.

U.S.

As a concrete first step, TIAC has already participated in two renowned trade shows in key areas of the U.S.: the New York Times travel show, and the Boston Globe travel show. It is our hope that we can help engage a large cross section of U.S. receptive travel trade in addition to

engaging directly with consumers. While it is too early to report specific outcomes of the New York Times travel show, we are pleased to report the Canada Pavilion won the “Most Interactive” award of the show.

TIAC will continue to work with partners including Destination Canada to achieve an accurate understanding of the U.S. market and fostering trust with key stakeholders such as operators and government officials.

Long term: India, Mexico and Brazil Markets

- Trade missions for TIAC President & CEO and Canadian delegation to India, Mexico and Brazil.
- Market Research on difficulties or perceived difficulties travelling to Canada with assistance from polling and industry statistics
- Advocate successfully for full visa waiver for both Mexico and Brazil

5. Measurement of Results

Quantitatively, TIAC evaluates efforts in tourism markets by measuring:

China

- Increase in visitors and spending from targeted markets (new and existing) in China;
- Increase in RTO client numbers and revenues
 - ** As Statistics Canada does not distinguish between ADS and Non-ADS Chinese visitors, it will be difficult and costly to measure how much new ADS clients contribute to the overall Chinese inbound numbers. However we do expect these efforts to help sustain a healthy overall inbound growth rate;
- Increase in MICE visitors from China.

While critical to the business process in China, relationship-building is difficult to measure. However, TIAC will continue to keep track of contacts made, trade mission participants' reported earnings and feedback on missions.

U.S.

- Increase in visitors and spending from U.S. with a goal of 2.6 million additional visitors per year by 2020;
- SME participation in trade missions to US with positive feedback;
- SME engagement in TIAC's Path to Export program.

Other Markets

After our expansion of business development efforts in the Chinese market we will use similar matrices to measure progress in markets such as Brazil and India.

- Partnerships with Brazilian and Indian outbound tour operators
- Number of Brazilian and Indian visitors as well as spending levels