

Renewed
Reimagined

TOURISM INDUSTRY ASSOCIATION OF CANADA

Growing International Travel & Tourism Business for Canada

2022–2024 International Business
Development Strategy

TIAC  AITC

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Acknowledgements

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Introduction

Revisit

With the aim of helping to increase international visitation to Canada, the Tourism Industry Association of Canada updated its international business development strategy (IBDS) in 2017. Our 2018–2020 IBDS was built upon the successes achieved through past efforts, including the 2010 Approved Destination Status agreement, 2013 and 2016 trade missions to China, and the 2016 Canada-China Tourism Advancement Program, launched ahead of the Canada-China Year of Tourism. In addition to continuing our important work to grow travel & tourism business from the China and U.S. markets, this strategy also outlined longer term objectives for increasing international visitation from emerging markets, such as Brazil, Mexico, and India.

Our 2018–2020 international business development strategy was built upon the successes achieved through past efforts...





Renew

The pandemic has had and will continue to have an immeasurable impact on the pursuit and enjoyment of travel and tourism in and around Canada. It has shapeshifted our business models, tested our assumptions, and challenged us to build our collective resilience to future shocks on our sector. As we continue to respond to our changing realities, including working to grow domestic tourism, we need to renew our efforts to support the return of international travel & tourism in the years to come. This must include aligning our organizational priorities, creating synergies with partners, and working to ensure our foundation for developing international travel & tourism business for Canada is stronger than ever.

...we need to renew our efforts to support the return of international travel & tourism in the years to come.

Reimagine

To help manage the realities of COVID-19 while mitigating the risks associated with its continued impact on international travel & tourism, we need to recognize and respond to the increasingly Volatile, Uncertain, Complex, and Ambiguous world that continues to develop around us. Despite this increasingly challenging environment, our aim is for the Canadian tourism industry to be among the most competitive in the world. To achieve this, we need to reimagine how we support the development of international travel & tourism business and investment for Canada. In turn, this requires us to have Vision and Understanding as well as be Courageous and Adaptable.

This 2022–2024 International Business Development Strategy report is the result of a process that included revisiting how we approached international business development, renewing our commitment to supporting the development of international travel & tourism, and reimagining our role and responsibilities in the collective effort to ensure that Canada flourishes as an international destination.

Our aim is for the Canadian tourism industry to be among the most competitive in the world.



Methodology

One goal guided the development of our 2022–2024 International Business Development Strategy: the research and co-design of a strategy that is responsive to its changing environment, instills confidence in the industry, looks to a future where Canadian tourism is flourishing, and strengthens our advocacy efforts on behalf of all stakeholders, including tourism business owners and operators, industry organizations, Provincial and Territorial tourism industry associations, and Destination Management/Marketing Organizations among others.

Towards realizing this goal, we set out five objectives at the onset of our project, and these served to guide the strategy development process:

- 01 To meaningfully engage a breadth and diversity of stakeholders across the project
- 02 To revisit past and active work, to see where there are opportunities to renew and/or refresh
- 03 To reimagine international business development using innovative tools and methods
- 04 To build the case for developing international business over the short term (first year) and medium- (second year) to long-term (third year+)
- 05 To prepare a strong 2022–2023 CanExport Associations funding application

We divided the strategy development process into two parts and six phases. The first part was focussed on research and the second part was focussed on strategy development. We also used mixed methods to collect data and engage a breadth and diversity of stakeholders. A comprehensive literature review took place. The international business development efforts of comparator organizations were investigated. In addition to regular and ongoing internal meetings and decision-making sessions, we also conducted interviews with internal and external key informants, surveyed both industry members and residents across Canada, and engaged delegates at the 2021 TIAC Tourism Congress in a co-design process. All these research activities sought to respond to 30 questions that were identified in a research work plan, and all these questions centred around one broader inquiry into the past, the future, and how to bridge the gap between these two.

An innovative design and storytelling tool called the Flourishing Business Canvas was used across the research and strategy development process to create several versions of our international business model, including a 2020 baseline, a 2030 inspiring vision, and a 2025 snapshot of where we expect to be at the successful conclusion of our 2022–2024 international business development strategy.¹

¹ Flourishing Business Canvas: <http://www.FourishingBusiness.org>

Insights

We have an important role to play as the voice of Canada's tourism industry because we represent tourism business owner and operator interests when it comes to developing international travel & tourism business for Canada. We draw strength from our active connections and open communication channels with Canada's travel & tourism industry, tourism organizations and associations, government bodies, and international organizations. And, we are uniquely positioned to advocate on behalf of all stakeholders of Canada's travel & tourism industry. This advocacy work is recognized and valued by industry. Overall, we confirmed with our stakeholders that we continue to have a role to play in ensuring that our international business development efforts reflect industry needs and priorities.

Specifically, as industry navigates the challenges posed by the impacts of COVID-19, across our research and engagement for this strategy our stakeholders told us there is a continued need for our advocacy efforts to connect tourism recovery to safety, access, and the dispersion of visitors. Through our research, we heard the challenges related to post-pandemic realities, ranging from legacy restrictions and the reduced capacity of industry members to those related to the workforce and access to destinations across Canada, have only been exacerbated over the past two years. We know that some of these challenges have led to increased and continued collaboration and communication, and the continuation of these collaborative approaches is paramount to addressing these challenges and others that will affect our combined efforts to attract and exceed the expectations of visitors from around the world. On a related topic, our research revealed that the existence of government financial support programs for tourism businesses and organizations in Canada has been important to the continued resilience, adaptation, and innovation of tourism business from coast to coast to coast. This positions Canada's travel & tourism industry ahead of other nations.

Top two benefits industry associates with increasing international travel & tourism:



Increased business revenue, profit, and opportunities



Return, recovery, and resilience



Further, we learned Canada is also well poised to pursue better and more balanced international travel & tourism, in part due to the recognition of Canada as a safe destination. Although the pandemic has impacted brand Canada and market access to our destinations, Canada's reputation as a safe place, to visit, enjoy, and explore, aligns with the domestic and international markets' increased attention to and prioritization of health and safety as we progress through post-pandemic travel realities.

Our stakeholders strongly communicated the growing interest and imperative to shift travel & tourism practices to be more sustainable, regenerative, and inclusive. We learned there are the systemic and pressing issues related to travel & tourism's contribution to human-created climate change and the inequitable access to benefits and opportunities regardless of race, gender, nationality, age, and/or socio-economic background. In other words, there is a real opportunity for international travel & tourism to create and contribute to Canadian solutions to respond to larger economic, social, and environmental challenges. Our current and future work must enable both inclusivity and sustainability.

Two thirds of Canadians (64%) recognize environmental sustainability as important to travel & tourism.



Our research also reminded us that there are structural limitations to our role in developing of international travel & tourism business for Canada. These are realities that we need to consider as we move toward actioning the strategies identified in this report. An important reality we need to factor into our plans and activities is that while we are a member-based organization with strong direct connections to travel & tourism businesses, we lack the direct connection to visitors and Canadian residents. We must then rely on our stakeholder network for this perspective so that we can develop a shared understanding with them of our role in supporting the development of international business, including confirming

our capacities and identifying viable areas of support that we can provide. Further, we recognize that to be efficient and effective in our international business development, we need to continuously strengthen and at times reshape the relationships that we have with our key partners.

We believe this new level and approach to collaboration is important for TIAC to make a strong and growing contribution to international business development efforts in Canada. We will achieve this in ways that draw from its areas of expertise and resources, maximizes capacity, avoids duplication of efforts, and informs relevant and efficient international business development actions and activities through industry-informed perspectives and priorities. As examples: an initial and important area for collaboration is the much-needed research to refresh Canada's target markets in a post-pandemic world. There is an equally important need to support and enable capacity development and investment to realize the sustainable development of tourism offers and infrastructure across Canada.

Top three factors key informants associate with TIAC's work to increase international travel and tourism business:

- 01 Opportunity to tap into potential of Canada as a premiere destination and attract important international visitors
- 02 Support industry to have a vibrant and capable tourism sector
- 03 Inform policy making with industry perspective



We see an exciting opportunity to leverage our position as the voice of Canada's tourism industry to inform the growth of international visitation to Canada. We have the leadership and stakeholder network to unite Canada's tourism industry as one voice, and rally around a collective effort to grow international visitation to Canada. In other words, we see a powerful opportunity for TIAC to use its expertise, capabilities, and relationships to help unite the Canadian tourism industry around a collective and informed vision for international business development.

Our research also revealed several specific areas of international business development opportunity. These include helping to prepare industry to receive a diversity of international visitors and working to ensure that international business development efforts support the sustainable and inclusive growth of Canada as an international tourism destination.

We also learned that a number of existing activities are adding value to international business development and must continue in partnership with our stakeholders. As an example: continuing to grow awareness around the value of tourism for Canada, including its role and contributions to our economy, society, and the environment. And continuously doing this by strengthening our work with Indigenous Peoples, governments, provincial/territorial, regional, and municipal tourism organizations, industry members, and strategic partners, including Destination Canada.

The insights that were garnered for our research set the stage for our new collaborative, inclusive and sustainable vision for Canada's travel & tourism industry's international business development.

Top three changes key informants identified are needed for international business development based on the impacts of COVID-19:

- 01 New diversified target markets
- 02 Increased importance and consistency of safety standards
- 03 Tackling the policy barriers of traveling to and within Canada



Vision

Working back from 2030, this inspiring vision for the organization has as its foundation an interdependent relationship with current and future stakeholders across Canada, ranging from members and communities, foreign partners and supporters, marketing partners, service providers and of course government. Importantly, all these stakeholders come from broader groups of individuals and organizations that have a genuine interest in TIAC's work to develop international travel and tourism business. For example, Canadian residents, working in travel and tourism need job security as well as increased opportunities. Businesses need stimulating and accessible destinations to host meetings, conferences, and events. Foreign nationals need exciting and inspiring tourism experiences. Industry need access to and visibility within foreign markets. Destination marketers need high quality product and content to share.

Through developing unique and lasting relationships with stakeholders—relationships that are fostered through ongoing and open communication where information flows in both directions through direct and indirect channels—we know that confidence will grow, trust will be nurtured, and collaboration will become the standard for international business development. Many of these relationships will be formalized through partnerships.

The Tourism Industry Association of Canada is a strategic partner, creative collaborator, and the industry leader for the inclusive and sustainable development of international travel and tourism.



In focussing our energies on activities that align with our organizational mission, values, and strategic imperatives—including advocacy and partnership development, research, and capacity building, and of course our own operations—we will co-create much value in pursuit of our vision.² Specifically, we will help to position destinations across the country within a Canada that is world recognized, grow Canada as a best-in-class destination, make sure tourism has a positive impact, ensure visitors have great tourism experiences, support industry in growing their international business, and ultimately enable and support a thriving Canadian tourism industry.

To realize the vision TIAC will need access to a breadth and diversity of resources to meaningfully support the development of international travel and tourism business for Canada. Examples of tangible resources that we will need to leverage include new technology and innovations, market intelligence and data, tourism products and experiences. Further, intangible resources, ranging from established connections and relationships, knowledge and expertise, input, and feedback, are just as important to realizing our vision for international business development.

Of course, neither our international business development activities nor the resources that we need to action them exist in isolation. They are drawn from our amazing and resilient environment, which provides us with not only finite pools of natural and living capitals that we need to honour and respect in our pursuit of growth, but also services, such as the purification of air and water, which are more powerful and important than all our efforts combined.

² Tourism Industry Association of Canada: <https://tiac-aitc.ca/About.html>

From this perspective, as well as from the perspective of society and the economy, we couldn't be more excited to support the development of international travel and tourism business for Canada. The benefits, all of which can and will be measured, simply outweigh the costs. And only because we have come together now and in the years that follow, will the following seven goals be reached by 2030:



Sustainability: tourism businesses, products, and experiences are well-positioned to thrive now and into the future



Preparedness: industry is ready, willing, and able to meet the demand for high quality



Workforce: tourism is a career of choice that employs 12–15% of the labour force



Relationships: international business development is a conduit for connections and collaboration



Visitation: more low impact and repeat visitors from diverse markets, that are experiencing all that Canada has to offer



Reputation: Canada is recognized as a safe, diverse, inclusive, and sustainable destination of choice



Organization: international business development is both meaningful and economically viable for TIAC

The question that remains is how will we get here?

Strategy

Moving towards our vision for the development of international travel & tourism business for Canada, we will take a stepped approach to pursuing the seven goals that we have set for 2030.

01 Sustainability

For our industry and its products and experiences to be well-positioned to thrive now and into the future we need to approach all our work with environmental, social, and economic sustainability in mind.

In support of instilling a culture of environmental and social awareness, responsibility, and sustainable development, we will **conduct industry-focussed research**, compiling and sharing existing and relevant tools as part of the process. We will also establish **strategic and working partnerships** with sector organizations to deliver capacity development tools and resources to industry that have sustainability at their core. We will **advocate for industry** to prioritize the environment and society as much as the economy when we communicate with our members and industry at large. We will also **advocate for government** to provide support to tourism businesses in their sustainability and regenerative tourism efforts.



By 2025 we will have...



...sustainability tools and resources that are readily available to industry.



...members that are prioritizing the environment and society as part of their business models.

02 Preparedness

We need to support the growth and development of our industry so that Canadian tourism operators are ready, willing, and able to meet the demand for high quality tourism experiences. At the same time, we need to build awareness. Awareness amongst industry of standards and best practices. Awareness amongst foreign partners and outbound tour operators of our amazing industry and our ability to service tourism demand from their markets.

To be prepared, we will **develop the capacity** to meet these needs by leveraging our experience and expertise from the Approved Destination Status program to develop, implement, and manage a new Tourism Export Readiness Program. This new program will include checks and balances for development, incorporate sustainability standards, set goals for inclusivity, and support capacity development through a variety of methods.

We will also collaborate with our partners to **conduct research** into standards and best practices in creating tourism products and delivering tourism experiences to target international markets, and then compile and share these with industry.

We will continue to **work in partnership** with Destination Canada, connecting them to a breadth and diversity of industry members for trade missions.

Last, we will evolve our **advocacy** efforts to include leading government relations trade missions to Destination Canada target markets.

By 2025 we will have...

- ...delivered a best practice model to prepare industry for future demand.
- ...an industry that is aware of the highest standards for tourism products and experiences.
- ...foreign partners and outbound tour operators that are aware of our industry and ability to service demand.





03 Workforce

Knowing that some of the biggest challenges that our industry faces today and will continue to in the future relate to our workforce, we need to be both ambitious and strategic in addressing systemic issues. As examples: we need to make tourism jobs not only appealing but also accessible and viable for a diversity of Canadians; we also need to ensure that tourism is recognized and celebrated as an important and meaningful career.

To build back better, we will **advocate** for tourism as a career of choice for all, including the recognition of foreigner and newcomer tourism skills and experience. We will **work to support our partners**, from Tourism HR Canada to our network of Provincial and Territorial Tourism Industry Associations, in raising the floor and creating tourism career ladders.

By 2025 we will have...



...tourism employing a breadth and diversity of Canadians.



...tourism jobs as well as employees being valued by employers specifically and Canadians in general.

04 Relationships

As an organization with a strong and growing membership network and variety of established partnerships, we need to ensure that our efforts in international business development are conduits for connections and collaboration across our industry.

To co-create value with our stakeholders, we will **work in partnership** and include a diversity of members in our work. This will be accomplished directly through such things as active participation in trade missions and indirectly through our communications that support our partners' efforts to grow international business for Canada. To attract international investment, we will **conduct TIAC-led foreign investor trade missions** and will **host virtual/in-person investor forums** between Canadian stakeholders and international investors.

By 2025 we will have...



...industry informing and participating in the collective effort to grow international business for Canada.



...facilitated connections between our Canadian businesses and international investors.





05 Visitation

If we want to grow, lower impact and repeat visitation from diverse markets that are interested in experiencing all of that we have to offer, we need our rural, remote, and rebuilding destinations, including urban centers, to be prioritized.

To do this we will **advocate for** both an equitable distribution of tourism resources and opportunities as well as the facility to access these. We will also continue to support the development and implementation of year-round product in rural and remote destinations across Canada.

By 2025 we will have...



...rural, remote, and rebuilding destinations, including urban centers, welcoming new visitors.

06 Reputation

We have and will continue to benefit from brand Canada's position as a safe and diverse destination, but our reputation domestically and abroad needs to be managed and maintained by all who operate in the travel & tourism sector.

In support of a strong brand Canada, we will continue to **deliver Rendez-vous Canada**.³ We will actively participate in national tourism summits hosted by our foreign counterparts to advance and expand our advocacy for Canada's tourism industry. We will also become an active United Nations World Tourism Organization (UNWTO) Affiliate Member to be present and participate at the international stage and maximize the benefits of being a World Travel and Tourism Council (WTTC) member by participating in relevant committees and engagements.

³ Rendez-vous Canada is an event co-hosted by TIAC and Destination Canada to welcome international buyers back to Canada: <https://www.rendezvouscanada.ca/>

By 2025 we will have...



...an industry that is being profiled through international business channels.



...recognition as the voice of Canada's tourism industry.





07 Organization

To realize our vision for the benefit of all our stakeholders, our efforts in international business development must be economically viable and meaningful for TIAC as an organization. We also recognize that our efforts to support international business development are particularly contingent on our organization's ability to be recognized, to develop and grow relationships, and secure the necessary resources.

A first step towards being **recognized as a valuable partner** is recalibrating our working relationship with Destination Canada to include collaboration on the development of international business. This includes not only **continued advocacy** for funding for Destination Canada but also helping to inform how these funds are allocated to support industry-led international business development. We will also work to ensure that our efforts to develop more sustainable and inclusive international business are matched by our adoption of **organizational best practices**. We will **ensure of our business model** is designed to secure the resources required, including funding, associated with developing international business.

By 2025 we will be...



...recognized as a valuable partner in international business development.



...equipped with the resources, experience, and capacity to champion international business development work.

Strategic Framework



Sustainability



Preparedness



Workforce



Relationships



Visitation



Reputation



Organization



Sustainability



Goals

2031 Goal Statement

Tourism businesses, products, and experiences are well-positioned to thrive now and into the future

2025 Goals

Tools and resources are readily available to industry
Members are prioritizing the environment and society as part of their business models

Activities

Strategic Framework

Advocate for industry to prioritize the environment and society as much as the economy when communicating with members and industry at large

Advocate to government to provide support tourism businesses in their sustainability and regenerative tourism efforts.

Partnership

Strike strategic and working partnerships with organizations to deliver capacity development tools and resources that have sustainability at their core

Research

Conduct research into, compile, and share existing and relevant sustainability tools with industry to use



Preparedness



Goals

2031 Goal Statement

Industry is ready, willing, and able to meet the demand for high quality tourism experiences

2025 Goals

TIAC has delivered a best-practice model to prepare industry for future demand

Industry is aware of the highest standards for tourism products and experiences

Foreign partners and outbound tour operators are aware of Canadian industry and their ability to service demand

Activities

Advocacy

Conduct TIAC-led government relations trade missions

Partnership

Support Destination Canada trade missions by facilitating connections to a breadth and diversity of industry participants

Research

Conduct research into, compile, and share standards for and best practices in creating tourism products and delivering tourism experiences

Capacity Development

Develop, implement, and manage new overarching Tourism Export Readiness Program



Workforce



Goals

2031 Goal Statement

Tourism is a career of choice that employs 12–15% of the labour force

2025 Goals

Tourism employs a breadth and diversity of Canadians (across job types/levels, geography, and demographics)

Both tourism jobs and employees are valued by employers specifically and Canadians in general

Activities

Advocacy

Advocate for tourism as career of choice for all, and the recognition of foreigner and newcomer tourism skills and experience

Partnership

Support partners in raising the floor and creating tourism career ladders



Relationships



Goals

2031 Goal Statement

International business development is a conduit for connections and collaboration

2025 Goals

Industry is informing the collective international business development effort

TIAC has facilitated connections between Canadian business and international investors

Activities

Advocacy

Conduct TIAC-led foreign investor focussed trade missions

Partnership

Diverse members are directly and indirectly involved in international business development partner efforts

Operations

Host virtual investors forum(s)



Visitation



Goals

2031 Goal Statement

More low impact and repeat visitors from diverse markets are experiencing all that Canada has to offer

2025 Goals

Rural, remote, and rebuilding destinations, including urban centers, are welcoming new visitors

Activities

Advocacy

Advocate for an equitable distribution of tourism opportunities and the facility to access these

Capacity Development

Support year-round product development and implementation in rural and remote destinations



Reputation



Goals

2031 Goal Statement

Canada is recognized as a safe, diverse, inclusive, and sustainable destination of choice

2025 Goals

Industry is being profiled through international business channels
TIAC is internationally recognized as the voice of Canada's tourism industry

Activities

Advocacy

Actively participate in national tourism summits hosted by foreign counterparts

Partnership

Become an active UNWTO Affiliate Member and maximize the benefits of being a WTTC member

Operations

Implement Rendez-vous Canada (RVC) on behalf of Destination Canada



Organization



Goals

2031 Goal Statement

International business development is both meaningful and economically viable for TIAC

2025 Goals

TIAC is recognized as a valuable partner in international business development

TIAC has the resources, experience, and capacity to champion international business development work

Activities

Advocacy

Continue to advocate for funding to Destination Canada

Partnership

Recalibrate working relationship with Destination Canada to include collaboration

Operations

Ensure international business development efforts champion organizational practices

Develop TIAC business model



If you are interested in learning more or would like to connect with us around ways you can support, including opportunities to collaborate, we would love to hear from you: contact@tiac-aitc.ca