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List of Acronyms

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

Executive Summary

TIAC's International Business Strategy aims to help increase international visitation to Canada, with an emphasis on capitalizing on the increased travel capacity in the U.S. market and emerging markets such as China, India and Mexico, also supporting the goals in the government's recently released New Tourism Vision (NTV)

This updated International Business Development Strategy (IBD) builds on the successes achieved through our IBD tactics and outlines new information gleaned from TIAC's work, and expanded market interests.

Internationally, the tourism industry is growing and there are unprecedented opportunities for economic growth in both emerging markets such as China, India, 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 11.1% in 2016.

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 a key target market for Canada. TIAC has built on the foundation created by the ADS agreement created in 2010, its trade missions to China in 2013 and 2016 as well as the TIAC Canada-China Tourism Advancement Program which includes tailor-made China export Readiness training for industry stakeholders. Together, these initiatives have assisted industry increase business with Canada's most important emerging market. TIAC's trade missions to China provided valuable learnings and experience for TIAC in supporting our members' business development efforts in emerging markets. Both missions also garnered invaluable market knowledge for the Canadian SMEs who participated. TIAC is seeking to capitalize on this experience and continue to provide industry with more trade opportunities in China's tier 2 cities, with new traveller profiles such as China's independent travellers and MICE segment, and in other emerging markets over time.

As a result of the success of the ADS agreement, and the 10-year multiple-entry visa for Chinese visitors, TIAC has made important inroads into this market. However, with Visitor Application Centres (VACs) in only a small number of cities, TIAC had advocated the need for additional VACs in Chinese markets. TIAC was pleased with the announcement of 7 additional VACs in 2017 as we believe that this will assist Canada in accessing a larger portion of the potential travel market in China. In addition to advocating for more VACs in China, we have also focussed large portions of our trade missions in secondary markets to expand our reach in other regions in China. Now that these markets have easier access to Canada, the Canadian Tourism industry must educate these markets on our product offerings.

In terms of the U.S. market, more Americans than ever have passports (122 million), and travel intentions are high. Much-needed marketing investments of \$30 million over three years by the federal government to work with industry to market Canada in the U.S. through the Connecting America program, combined with a favourable currency have resulted in increased visitation from the U.S. market reaching 13.89 million in 2016. 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.

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).

To reach these international business development goals in the short term, TIAC will continue to organize trade missions to China and establish additional strategic partnerships with Chinese key stakeholders such as the China National Tourism Administration (CNTA), Union Pay and others. We look forward to continue to host a significant number of American delegates to foster more business ties through our highly successful involvement in Rendez-Vous Canada, Canada's largest travel trade show. We will also continue to share knowledge and insights gained from these activities with our members. At the same time, we are planning our third official China mission during the Canada-China Year of Tourism (CCYT2018) as an important step toward solidifying our ties with this important market.

Looking towards our medium to long term strategy, we will use the success and lessons learned from our Canada/China projects and trade missions to enable TIAC, over time, to expand similar efforts to India, Mexico and additional key emerging markets.

Sector Overview

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

TIAC serves as the national private-sector advocate for the \$91.6 billion (2016) Canadian tourism industry. 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 increased travel capacity in the U.S. market and emerging markets such as China, India and Mexico. TIAC was successful advocating for a long-term and competitively funded national marketing budget for Destination Canada to provide immediate returns to Canada's tourism economy. While TIAC leads the advocacy for this and other asks, none of the funds flow to TIAC. TIAC also supports the goals in the government's recently released New Tourism Vision (NTV). It represents goals for tourism growth between now and 2021, and more long-term to 2025 focusing on the areas of Marketing, Access and Product (M.A.P.), mirroring TIAC's longstanding advocacy priorities.

The action items outlined in the NTV's M.A.P. aim to reach the Vision's three primary goals:

1. Canada's re-entrance to the UNWTO Top 10 by 2025
2. 31% increase in international visitors by 2021 (\pm 6.2 million additional travellers)
3. Double Chinese tourism by 2021 (1.25 million goal)

TIAC's long term goals aim to bring the Canadian tourism industry into a better position to fulfill the goals set out in the tourism vision. This builds upon goals in past iterations of TIAC's IBD plan.

- 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; the 2016 mission expanded on this information, and generated new leads for the industry
- 2) Promote and educate key stakeholders in these markets about Canadian tourism (product, operators and logistical considerations);

- a. Past Success: 2013 trade mission to China generated over 100 leads and many more contacts; continued success in 2016 with an additional 70 leads generated
 - b. Past success: Trade missions to the U.S. for the New York Times Travel Show and the Boston Globe Travel Show in 2016
- 3) Inform and educate our members on how they can best serve new tourists, specifically in China; this includes expansion of our China readiness training efforts & continued expansion of the ADS program
 - 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;
 - b. Past Success: TIAC's China readiness programming has expanded and improved, reaching a significant number of Canadian destinations
- 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; 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; increased numbers of VACs in key 2nd tier Chinese markets; a new study being commissioned by TIAC from Deloitte on cost competitiveness issues 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 (including advocating for increased marketing funding), 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, making the most of recently high growth out of Mexico 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. Further, the visa lift for Mexican visitors in December 2016 has led to more visitors (50%+ increase to date), more inbound flights, and more industry interest in the Mexican market that DC and TIAC can work 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, especially in the promising emerging markets: China, India and Mexico.

The Tourism Industry and its Importance in Canada:

With over 200,000 businesses in Canada employing 1.7 million Canadians, the tourism industry is a major economic driver worth \$91.6 billion and is Canada's largest service export, generating an estimated \$20 billion in export revenues annually. 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 2016, tourism exports were worth \$20 billion).

State of the Sector: Trends and Outlook

Globally, the tourism industry is booming – in 2016 alone, international arrivals exceeded 1.23 billion with tourism receipts reaching U.S. \$1.4 trillion. By 2030, the UNWTO expects at least 1.8 billion international arrivals annually. The majority of current Canada's visitors come 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 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.

Since the last iteration of TIAC's international business development plan, Canada has seen great progress in international tourism growth. Canada's share of the global tourism pie is finally growing at an impressive pace – while global international arrivals (i.e. all international visitors to all countries) grew 4.6% in 2016, Canada's international arrivals only grew by 11.1 % according to the UNWTO. In 2002, Canada ranked 7th most visited country in the world, but now sits in 17th place. While Canada's reputation is strong as ever, our increased market share continues to be put at risk, 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 and attractions, 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 (CNTA). In order to be recognized as a CNTA-designated RTO in a destination country a 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 undertook the role of overseeing and registering ADS-approved RTOs in 2010. ADS-registered RTOs also play an important role in attracting and organizing MICE travel.

TIAC currently has over 70 registered ADS operators in our membership – with high satisfaction rates from clients and the Chinese Government. In addition, TIAC's new China readiness programming allows Destination Marketing Organizations and export ready businesses to expand their knowledge and prepare for Chinese visitors. This program has been particularly popular on the East coast and Alberta. TIAC has also led China readiness sessions for Parks Canada.

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 successful and popular with SMEs, leading to our second GOA supported mission to China in the fall of 2016 with 12 participants. There is significant appetite in the industry for more of this programming as the impact of long-term growth from the market is being realized throughout the industry.

Competitive Position

Canada is blessed with the basics: natural beauty, interesting and sophisticated destinations and a great reputation. In 2016, Canada was featured as a top destination in many top publications including the Lonely Planet and Conde Nast. Even more recently, Travel+Leisure out of the U.S. named Canada the number one destination to visit, as a place of "tolerance and hope". 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 partners 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 a number of 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. According to DC data, arrivals from the US in 2016 were at their highest since 2005, with air arrivals, up 17% over 2015, representing an increasing share of arrivals. Despite low air capacity growth (3%), air arrivals in 2016 were the highest on record. Of this, the most significant growth has been through air access points, which implies that Americans are travelling further and staying longer when visiting Canada – positive momentum after several years of decline.

This resurgence is even greater with our other North American partner, Mexico. There has been significant visitation and business growth since the December 2016 visa lift, and with even more flight capacity being announced this year by major airlines, we expect this growth to continue.

Canada also continues to enjoy a strong reputation in China. In 2014, Canada was ranked the third most satisfactory outbound destination by the China Tourism Academy (part of CNTA), and continues to be held in high regard. DC is also reports that Millennial visitors (aged 20-34 years) account for the largest share of total visitation from China at 28%. This is also the demographic in China with the highest overall growth potential.

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

Progress and Lessons learned

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 future missions to India and Mexico.

TIAC and industry delegates gained valuable insight during the 2013 and 2016 trade missions to China – both on the market itself and on the best way to run trade missions. During the trade missions, we heard from many Chinese stakeholders about barriers to travel to Canada as well as new opportunities, such as the MICE segment. Highlights of our trade missions 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 to effectively market in China alone without being under the well-respected DC brand.
- During the 2016 mission we also heard of great interest in obtaining more information about the Fall and Winter season offerings in Canada.
- We also were able to 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.

Both trade missions were 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. As the missions were scheduled to lead into the Showcase Asia Trade Show, some of the participants stayed on to participate in the Trade Show.

Both Chinese stakeholders and participants indicated that one-on-one meetings were extremely useful. Since both missions included ADS operators and attractions representatives, their interaction with each other provided a valuable and profitable experience for all parties. In future trade missions, we would aim to again include a mix of both ADS operators as well as SME attractions businesses.

In 2015, we completed two U.S. trade shows (New York City & Boston), in which TIAC was granted GOA money from the 2015-2016 supplemental funding rounds. The long-term impacts of these activities were positive, with several industry members continuing to attend these shows in 2017 with repeated success. 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 mission to China and other destinations down the road.

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

Though we continue 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 over \$20 billion a year in exports. By expanding trade with China, Mexico and India as well as the U.S., and other mature markets (Europe), 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 – the FIT, Millennial traveller

We continue to target China. Globally, Chinese outbound tourists are the fastest growing group of travellers. In 2016, Chinese travellers took over 135 million outbound trips. China has overtaken the U.S. and Germany as the world's number one source of tourists, and spend US\$ 261 billion while travelling according to the UNWTO.¹ The Chinese market has proven potential for Canada: visitors increased by 22% in 2016 with each visitor spending on average \$2,338 per trip (2016 forecasted data).

According to insights from Destination Canada, free and independent travellers make up 40% of those most likely to consider Canada as their next overseas trip – the largest total segment. As a result, this market will become a very important cornerstone in both mature and secondary markets within China during industry trade missions, and when preparing to welcome more travelers.

Despite evidence that the Chinese market is maturing in the global market, and therefore slowing in some areas, there is still growth potential with evolving types of travellers, and Canada is still performing very well in terms of growth (+22% in 2016). According to Destination Canada's market profile for China, Canada is the 4th highest desired destination for Chinese travellers. With the 2017 opening of seven more VACs in more secondary markets, we expect that the market will continue to flourish with easier access in markets that have not yet matured.

China – MICE Markets

During TIAC's 2016 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

¹ <http://media.unwto.org/press-release/2017-04-12/chinese-tourists-spent-12-more-travelling-abroad-2016>

MICE travel to Canada from China compared to 2007. 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.

Mexico

As of December 1st, 2016, the Government of Canada lifted the visa requirement for most residents of Mexico wishing to enter Canada, in favour of moving visitors to the electronic travel authorization (eTA) program. This has led to a momentous increase in visitation from Mexico, which has grown 51.6% YTD 2017. It is estimated that this increase in visitation has added up to \$388.9 million to the Canadian economy. With these levels of growth, and increased apprehension from the Mexican market to the United States, we see significant continued growth potential here. Helping Canadian businesses prepare for more Mexican visitors as a long-term trend will be beneficial to ensuring repeat visits.

U.S.

In the US, our international business strategy has aimed to provide more access for Canadian tourism businesses as we focussed our advocacy on increasing marketing dollars aimed at the U.S. and breaking down access barriers through enhanced cross-border pre-clearance through the "Beyond the Border" initiative. Businesses across Canada had suffered from a downturn in visitation from the United States, which had previously 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.

Since 2015, we have begun to see a turnaround with 2016 continuing to see growth for U.S. visitation to Canada. In 2016, visitation from the U.S. was up 9.7% over initial 2015 growth. Reaching out to the U.S. market will be crucial in maintaining this positive momentum.

Other Markets

Mexico, India and Brazil also promise great opportunities according to 2016 and preliminary 2017 data. In particular, Mexico is beginning to rebound from the visitor visas imposed by Canada in 2009, as this decision has been reversed allowing greater freedom to travel. Growing at an incredible 51% YTD 2017, this is perhaps the most rapid change in visitation for the inbound travel market. We expect these numbers to increase steadily in the coming months. TIAC intends to continue its "TIAC Trade Mission Program" which will likely include 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.

New research from DC in preparation for the Canada-China year of tourism (CCYT2018) also indicates that the largest share of travellers with interest in Canada are independent travellers aged 20-45. Trade missions and readiness training programs will have a more detailed focus on this segment of the market.

In other markets such as Mexico, Brazil and India where we may organize future trade missions, we aim to target outbound travel agencies, outbound tour operators, airlines and senior government officials for meetings as well as information sharing through our annual 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 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 missions to China, as well as expanded on our strategy for the U.S. market:

Short term objectives (1-1.5 years)

- Support the industry's involvement in the Canada- China tourism year through trade missions, cultural awareness, and collaboration with the CNTA and other Chinese business partners like Union Pay
- Updating export readiness training to include new insights on the growing independent travellers market in China; helping Canadian SMEs prepare for this and other Chinese markets
- Further research onto the economic impacts of the visa lift from Mexican visitors on the Canadian travel economy.
- 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 last year of the program's funding period (2015-2018);

Medium-term objectives (1.5 -3 years)

- Double the number of Chinese visitors to Canada (consistent with the government's New Tourism Vision)
- Increase U.S. visitation by at least 2.6 million by 2020
- Continue to grow the 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 (the program has increased from 38 to over 70 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 future trade missions to bolster Mexico, Brazil and India numbers.

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

- Analyse successes of three 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 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 continues to advocate for the removal of regulatory barriers to travel that Chinese visitors face so it can work with both governments to facilitate processes. Additionally, an enhanced appreciation of cultural nuances will also 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 over 70 in 2017, 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 and 2016 missions;
 - 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 sessions at 2013 through 2017 Congress sessions;
 - Ongoing: China workshops at DC/TIAC Tourism Town halls which are held in smaller markets across the country every year.
 - Ongoing: continued expansion of TIAC's China Readiness program for Canadian businesses
- 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: Millions in Chinese travel media hits from media availabilities from both trade missions in 2013 and 2016.

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. The Canada Pavilion won the "Most Interactive" award of the New York Times travel 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 and Mexico Markets

- Future 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

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;

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 Mexico and India.

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