

### WHAT IS TIAC?

The Tourism Industry Association of Canada is the only national organization that represents a full cross-section of the industry, including air and passenger rail, airport authorities, local and provincial destination authorities, convention centres, hotels, attractions and tour operators.

This cross-sectoral approach provides TIAC with a unique perspective, both within the sector and to key decision-makers.

For the tourism industry, TIAC finds alignment between players of disparate interests and geography. For decision-makers, who are bombarded by countless special interests from across country, we provide both context and focus on the tourism sector's most pressing needs.

TIAC's goal is to help foster a strong, prosperous and competitive industry, and to ensure that all three orders of government recognize the vital contributions that the sector makes to the Canadian economy. Our mission is to build a new public/private partnership that will lead to the creation of innovation, growth and economic development in the travel and tourism sector.



Over the past year, our tourism sector has bounced back, with some modest growth in international visitation and tourism spending. Having said that, those numbers seem to be buoyed by cyclical growth, and not by structural change that would facilitate growth in the longer term.



While the global tourism pie continues to grow, Canada's slice continues to narrow. And while Canada's brand as a destination is second to none, too many potential visitors continue to choose other destinations.

True growth requires breaking down our structural barriers – in particular as they relate to marketing, access and product. This can only be addressed by a strong presence in Ottawa. Over the past year, TIAC has made great strides in building our credibility and the credibility of the industry with decision-makers in Ottawa. But maintaining that credibility is an ongoing process.

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Vince Lombardi once famously said:

***Winning is not a sometime thing; it's an all-time thing. You don't win once in a while, you don't do things right once in a while, you do them right all the time. Winning is habit. Unfortunately, so is losing.***

Advancing the tourism file in Ottawa and making our industry an important part of the national conversation is not a "sometime thing." It requires a new approach, and more than a one-time investment in reaction to a particular irritant. Your industry representative can only be as strong as the industry's commitment to having that representation.

TIAC's new membership structure offers the industry an opportunity to invest in its own success, and to help tourism build a new presence in Ottawa. We look forward to continuing to work with this exceptional industry, and we appreciate your ongoing support.



**David Goldstein,**  
TIAC President and CEO

## TOURISM BY THE NUMBERS

- In Canada, travel and tourism can drive economic growth and diversity in every province and region across the country.
- Tourism generates \$74 billion in economic activity annually, with an impact that is equivalent to that of the fisheries, forestry and agriculture sectors combined.
- Travel and Tourism is a job driver – 617,300 jobs were attributable to tourism spending in 2010.
- More than 1.6 million Canadians hold a job in the tourism sector – 1 in 10 Canadian workers.
- Tourism is an export business generating over \$15 billion in currency exchange.
- U.S. and International visitors account for approximately 115 million person nights in Canada.
- Tourism generates taxpayer value. Approximately 28 cents of every tourism dollar spent in Canada contributes to tax revenues, resulting in more than \$19 billion in revenue for all levels of government and a federal share of \$8.8 billion.

# Why does the travel and tourism industry need a strong voice?

Tourism is one of the fastest growing economic sectors globally, with annual growth outpacing the world economy.

But unlike historical growth patterns in this sector, this phenomenon is being driven, in part, by a new global middle class of travelers who 10-15 years ago did not have the means and/or the ability to travel.

This has led to increased competition in the global tourism marketplace – with other jurisdictions becoming far more aggressive in marketing destinations, packaging tourism products and experiences, and attracting global travel consumers.

## CANADA IS FALLING BEHIND COMPETITIVELY

As tourism grows around the world, with receipts that will exceed a trillion dollars within the next few years, Canada's share of that market is shrinking.

Between 2002 and 2010, almost all countries posted international tourist arrivals gains – except Canada. Strong brand interest in Canada is just not converting into arrivals.

International Tourist Arrivals Top 15 Countries - in millions				
	2002		2010	
1	France	77.0	France	76.8
2	Spain	51.7	U.S.	59.7
3	U.S.	41.9	China	55.7
4	Italy	39.8	Spain	52.7
5	China	36.8	Italy	43.6
6	U.K.	24.2	U.K.	28.1
7	Canada	20.1	Turkey	27.0
8	Mexico	19.7	Germany	26.9
9	Austria	18.6	Malaysia	24.6
10	Germany	18.0	Mexico	22.4
11	Hong Kong	16.6	Austria	22.0
12	Hungary	15.9	Ukraine	21.2
13	Greece	14.2	Russian Fed.	20.3
14	Poland	14.0	Hong Kong	20.1
15	Malaysia	13.3	Canada	16.1

Who wouldn't want to come here? We are blessed with the basics: Unique natural vistas, safe and inviting cities, renowned festivals and attractions... But the basics are not enough in this increasingly competitive sector.

Like all other export consumers, the burgeoning international travel class has choice, and increasingly, *people are choosing not to pay high Canadian taxes or deal with red tape to come here.*

Our challenges are not merely cyclical – they are structural. The industry must adapt to the “new normal” – A tighter border with the US and a dollar at par for the foreseeable future.

## CANADA MUST DRAW A NEW MAP TO RESTORE ITS COMPETITIVENESS

Canada is falling behind in a growing international market due to intrinsic structural problems in three key areas (M.A.P.): M for Marketing, A for Access, P for Product.

### “M” for Marketing:

- We need competitive and sustainable funding for the Canadian Tourism Commission. Canada ranks 20th in the world in terms of funding for our National Tourism Organization.

### “A” for Access:

- Taxes & Fees: Airport rents, fuel taxes and security fees have rendered us 125th in the world for aviation cost structure. Canada is a “Fly-to” destination – and our cost structure is a barrier to success.
- Visas: We need an effective visa system to help facilitate access for key emerging markets, including Brazil, Russia, India, China and Mexico. North America needs a EU style perimeter approach that would allow ease of travel.

### “P” for Product:

- Investments in tourism products owned by federal and provincial governments (parks, museums and heritage areas), and renewal of support for attractions and festivals, creates urgency for travellers to choose Canada.
- An adequate supply of skilled labour providing quality service and hospitality to help create memorable visitor experiences.



## TIAC: A KEY CONTRIBUTOR TO THE NATIONAL POLITICAL DIALOGUE

TIAC has helped our industry become part of the national political discussion.

- Established regular and substantial contact with tourism partners within key federal departments, including Industry, Finance, and Transport;
- New engagement with “the Centre”, including consequential discussions with the Prime Minister’s Office and the Privy Council Office;
- Invited for the first time by Transport Canada to provide input on the annual priority setting exercise for air access negotiations;
- Representing the industry on the Deputy Minister of Citizenship and Immigration’s Roundtable;
- Representing tourism interests on the Canadian Border Services Agency’s business simplification working group;
- Priority briefings with the *Beyond the Border Working Group* on facilitating economic movement across Canada/U.S. border;
- Representing the industry in 2011 and 2012 federal budget consultations.

## ***Because changing the public policy environment in Canada will drive visitation, investment and jobs in our industry.***

### **SPEAK TO GOVERNMENT WITH A UNIFIED VOICE & COHESIVE MESSAGE**

Too often in the past, tourism was regarded as a sector of sectors, with too many divergent voices. It made us seem too difficult to please and too easy to ignore.

Overcoming our structural challenges requires increased focus and alignment around roles, responsibilities and stronger partnerships.

The impediments that contribute to our lack of competitiveness can only be addressed by having a strong national and cross-sectoral advocate for tourism interests.

For the tourism sector to be heard, it needs to do as other sectors have and speak to government with a unified voice with a cohesive message.

TIAC has demonstrated that it is up to this task.



### **TIAC’S RENEWED CREDIBILITY AND RELEVANCE**

Recently, TIAC has:

- Increased alignment horizontally with other key national associations representing the hoteliers, the airports, and airlines;
- Worked with these organizations to develop stronger research to support our policy asks;
- Enhanced our vertical alignment with the provincial tourism industry associations, PMOs and DMOs.

These efforts have not gone unnoticed, and the alignment of the industry’s key policy asks has helped to create traction. TIAC has begun to see meaningful results from a renewed and reenergized approach to representing the industry.

Rather than being on the outside of the decision-making processes providing reactive comments, TIAC is being sought out in advance by key decision makers for input on a number of fronts.

With a renewed relevance and an improved approach to its public affairs files, TIAC has helped our industry become part of the national discussion.

But to continue this work, TIAC needs the ongoing support of members from across the country.



## Invest in Success Today

Please join us in creating a winning environment for our industry. As a TIAC member, you can make a difference in our national tourism sector!

Our new membership structure provides an affordable entry point for small and medium-sized businesses as well as larger organizations.

### MEMBERSHIP STRUCTURE & 2011-2012 DUES

Membership Category	Dues	Description
<b>Large Enterprises</b>	\$7,500	<ul style="list-style-type: none"> <li>• Corporate &amp; Canadian head offices</li> <li>• Tourism businesses, sales &gt; \$25M</li> <li>• DMO, budget greater than \$15M</li> </ul>
<b>Medium-Sized Enterprises and Organizations</b>	\$2,100	<ul style="list-style-type: none"> <li>• Tourism business, sales \$5M-25M</li> <li>• DMO, budget \$0.5M - \$15M</li> <li>• National and Provincial Sectoral Organizations &amp; Associations</li> <li>• National and Regional Suppliers</li> </ul>
<b>Small Businesses and Organizations</b>	\$695	<ul style="list-style-type: none"> <li>• Tourism business, sales less than \$5 million</li> <li>• DMOs, budget less than \$0.5M</li> <li>• Local Sectoral Organizations &amp; Associations</li> <li>• Travel trade media &amp; News media</li> <li>• Government Departments and Agencies</li> <li>• Educational Institutions</li> </ul>
<b>Branch Member</b>	\$495	<ul style="list-style-type: none"> <li>• Affiliates, subsidiaries &amp; franchisees whose head office is a TIAC member</li> </ul>

Our membership year runs from September 1-August 31 every year.

## How to Complete Your Registration

### Option 1: Process Your Membership Registration and Payment Online by Credit Card

- Visit the online registration at: [https://www.tiac.travel/membership/english/member\\_register.asp](https://www.tiac.travel/membership/english/member_register.asp)



### Option 2: Request an Invoice

- Contact Jennifer Taylor, Director, Member Services, at [jtaylor@tiac.travel](mailto:jtaylor@tiac.travel) or 902-698-0984.

### Installments

- Large Enterprises and Medium-Sized Enterprises and Organizations can make payments in two installments each year. Contact Jennifer Taylor at the address below for more information.

## Questions or Concerns

If you have any questions or concerns about your membership, our advocacy activities or our events, please feel free to contact David Goldstein, Jennifer Taylor or any one of our talented staff.

- David Goldstein, TIAC President and CEO, [dgoldstein@tiac.travel](mailto:dgoldstein@tiac.travel) or 613-238-8765
- Jennifer Taylor, TIAC Director, Member Services and Partnerships, [jtaylor@tiac.travel](mailto:jtaylor@tiac.travel) or 902-698-0984.

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### WEBSITE

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