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TRAVEL INDUSTRY DEVELOPMENT

PLANNING PAPERS

Number 4

TRAVEL INDUSTRY PLANNING

AND DEVELOPMENT SEMINAR

MARCH 19-22, 1974

CANADIAN GOVERNMENT CONFERENCE CENTRE
OTTAWA

Industry Development Branch
Canadian Government Office of Tourism
Department of Industry, Trade & Commerce
Ottawa, CANADA. December 1974



Canadian Government
Office of Tourism

Office de tourisme
du Canada

Ottawa, Canada
K1A 0H6

INDUSTRY DEVELOPMENT BRANCH

December 24, 1974.

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P R E F A C E

The Travel Industry Development Program of the Canadian Government Office of Tourism, Department of Industry, Trade and Commerce represents a commitment by the Government of Canada to the planned development of tourism in Canada. In order to achieve that planned development it is necessary that the public officials in the federal and provincial governments responsible for tourism planning and development meet from time to time to discuss progress in the field and to discuss the latest technical advances. One of the means of achieving this discussion has been through periodic travel industry planning and development seminars.

The first such seminar was held at Montebello, Quebec, March 6, 7 and 8, 1973 and the proceedings of that meeting were published as: "Travel Industry Development Planning Papers Number 2" dated March 30, 1973. The second seminar was held at the Canadian Government Conference Centre, March 19 to 22, 1974. An abstract of the papers and discussions from that meeting is presented herein as "Travel Industry Development Planning Papers Number 4".

A limited number of the complete papers that were presented by the various speakers is available and can be obtained by writing to Mr. G.D. Taylor, Chief, Research and Development, Industry Development Branch, Canadian Government Office of Tourism, 150 Kent Street, Ottawa, Ontario, K1A 0H6.

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TRAVEL INDUSTRY PLANNING AND DEVELOPMENT SEMINAR

I. Introduction

A second travel industry planning and development seminar was held in the Government Conference Centre, March 19-22, 1974, following on the success of the first seminar held at Chateau Montebello, Quebec, March 6-8, 1973. The main participants in the seminar were federal and provincial officials responsible for tourism planning and development in Canada.

The format developed for the seminar centred around papers by academic, government and private sector speakers followed by discussion groups or workshops. The purpose of the seminar was to assess the tourism development and planning process in Canada, particularly in relationship to the Travel Industry Development Program of the Canadian Government Office of Tourism and to discuss better means of furthering the federal and provincial objectives of tourism planning and development in Canada.

II. Agenda

The agenda for the four days is reproduced in this summary as a guide to the topics that were discussed. (Appendix I)

III. Day 1

(a) Delegates were welcomed by Mr. D.C. Bythell, Director, Industry Development Branch, Canadian Government Office of Tourism. In his remarks Mr. Bythell brought out several problems in terms of travel industry development and suggested that the seminar should seek solutions for or ways to solutions. (Appendix II)

(b) Making Data Work For Planning
Dr. J.L. Knetsch, Simon Fraser University, B.C.

Dr. Knetsch outlined the necessity of setting clear objectives in tourism planning and pointed out that these must go beyond the traditional goal of more tourists. There needs to be a real concern for the incidence of gains and losses within the community, and the nature of the social impacts. He also raised the problem of the impact on the quality of the environment, and of the satisfaction of tourists.

In attempting to develop a framework within which the various concerns could be assessed, Dr. Knetsch said the history of benefit-cost analysis provided an encouraging approach in making required trade-off decisions.

(c) Planning For Tourism And Assessing Its Impact
Dr. M. Doctoroff, Bureau of Management Consulting, Ottawa

Dr. Doctoroff put forward a brief description in schematic form of how a tourism impact model might look. The model focused on "national" activities and more particularly on "provincial/territorial" activities.

The purpose of the model is to establish a comprehensive context in which development of tourism industries can be considered. It is expected that policy makers increasingly will be concerned with a broad set of economic, social, environmental and geographic effects associated with the trend toward and pressures of growth.

The emphasis of the Tourism Impact Models is to help in the decision making and policy setting processes and to assist in developing tourism according to the desires and needs which exist throughout Canada.

(d) Current Market Research and Its Application to Planning and Development

(i) Air Canada Study
Mr. W. Garrett, Air Canada, Montreal, P.Q.

Mr. Garrett outlined the results of a major study carried out on the Canadian Leisure Travel Market by Market Facts Ltd. for Air Canada. The purposes of the research were to provide management with an analysis of the leisure market in Canada, to identify new opportunities in travel related leisure and recreation activities, and to develop a framework for basic product design to reflect the types of consumer demand that exist in the market place.

The research uncovered four distinct lifestyle groups and six vacation experiences. The result is a 4 x 6 matrix consisting of 24 cells around which travel experiences can be built by Air Canada marketers.

Mr. Garrett then outlined how Air Canada marketing had developed travel experience for two of the 24 possible groups.

(ii) U.S. Market Segmentation Study
Mr. D. Livingstone, Marketing Branch, CGOT

The U.S. Market Segmentation Study was designed to study the U.S. market in depth with regard to attitudes to vacation travel and to Canada as a vacation destination. It was based on detailed interviews of 4,810 households in the United States.

The survey distinguished six distinct vacation market segments:

- (a) non-active visitor
- (b) active city visitor
- (c) family sightseers
- (d) outdoor vacationer
- (e) resort vacationer
- (f) foreign travel vacationer.

Segments (a) with 29% of the total and (f) with 26% were the two largest.

A major 1974 advertising campaign is based almost entirely on the results of the segmentation study.

It was pointed out that segment (f) has a resistance to coming to Canada because we do not have the type of plant that Americans seek.

(e) Travel Industry Development Problems
Mr. J. Sibbald, Travel Industry Association of Canada

Mr. Sibbald outlined many of the problems that the small operator in the travel industry faces in the conduct of his business. Several key problem areas emerged from his analysis:

1. a lack of understanding, particularly at the government level, of the travel industry;
2. the number and complexity of governmental regulations that affect the industry and the lack of consultation with the industry before new regulations are introduced;
3. the difficulty of obtaining capital for construction of new facilities or the modernization of existing areas.

These problems are of importance to the small operator and should be worked out in order to ensure his survival.

IV. Day 2

- (a) Tourism Planning Technique
Dr. C.A. Gunn, University of Guelph, Guelph, Ontario

Dr. Gunn described how tourism planning has been carried out in the past and developed some ideas on how it should be done. At present planning is on an individual enterprise basis with little or no communication between the main categories of developers-investors: government, private enterprise and non-profit organizations.

In order to be effective overall tourism planning must foster the accomplishment of several goals at the same time:

- (i) rewards to owners,
- (ii) better user satisfactions,
- (iii) environmental balance.

He then outlined 10 steps which can provide the basis for overall planning:

- (i) an overall understanding of both natural and cultural resource characteristics,
- (ii) studies of markets and transportation,
- (iii) analysis of (i) and (ii) to show areas of greatest importance,
- (iv) development of regional identities,
- (v) division of regions into three elements
 - (a) community attraction complexes
 - (b) circulation corridors
 - (c) a non-attraction hinterland,
- (vi) a more detailed study of the key communities,
- (vii) identification of potential attraction complexes,
- (viii) review of total potential and assigning priorities for further feasibility studies,
- (ix) transportation changes and the creation (or adjustment of older) facilities and services,
- (x) decision making for implementation.

The process as outlined requires a high degree of collaboration.

Dr. Gunn sketched out the application of this theory to the planning of Michigan's Upper Peninsula and reviewed some of the results that have occurred over time.

(b) Planning Process

Mr. W. Baker, Tourism Consultant, Toronto, Ontario

Mr. Baker first remarked that in order to stimulate or maximize opportunities and maintain options in a really effective manner, the planning process must be realistic in relation to Canadian socio-economic patterns and aspirations and their regional and provincial variations. There must be sufficient latitude and flexibility embodied in the planning process and its final output to accommodate the varying provincial and regional points of view.

He then reviewed the planning process in Canada and identified clearly the major interests of both private enterprise and government in the development of tourism. He stressed the necessity of public commitment to a plan and said without that commitment the planning exercise could well be useless. Planning must not stop at the development of a set of general strategies but must contain implemental project elements.

Mr. Baker emphasized that we do not have the answers to tourist development and that past experience has clearly illustrated this. He was confident, however, that the task of planning for tourist development could be carried out.

(c) The Irrefutable Logic of Planning Analysis

Mr. A.A. MacKinnon, Decision Systems Inc., Toronto

Mr. MacKinnon reviewed the nature of decision making and of the necessity for reasonable forecasts of future events. He stressed how the same set of facts, analysed by different people, could lead to completely different decisions and courses of action. He also pointed out that regardless of how accurate and how advanced analytical planning can become, the judgement factor cannot be far away.

He cited various examples, including CANTRAV, a pilot program designed to determine the feasibility of developing a computer oriented system to assist tourist operators in management.

(d) Mapping for Planning

Dr. J.H. Richards, University of Saskatchewan, Saskatoon

Dr. Richards by means of an illustrated talk described a mapping project that had been carried out in the province of Saskatchewan. The purpose of the project was to select information relevant to tourism in that province and to develop a methodology that would permit it to be graphically portrayed inter-relatedly.

This attempt at "Mapping for Planning" is not a new concept and the technique employed — sieving or correlating through the use of transparencies — is certainly not an old one. It is a useful technique, the value of which lies in extracting key criteria and synthesising them into blocks of related information, that is, areal groupings. This is not the only method of approaching planning, for tourism or any other purpose, but it is an essential approach to the understanding of pertinent relationships. There is little doubt that an overall plan for recreation and tourism is long overdue in the province; and this pilot project may provide some broad guidelines.

(e) Public Involvement in Planning
Mr. P. Wyatt, Ontario Ministry of Natural Resources

One of the key steps in the planning process that cannot be overlooked is the matter of public involvement. Mr. Wyatt reviewed the history of public involvement in the Canada-Ontario Rideau-Trent-Severn Study. He outlined the nature and the extent of involvement, with government departments, local governments and with citizens through press releases, public hearings and special interest meetings. He pointed out also the importance of the local influentials in finding out problems and what the people were interested in.

While involvement slows down the planning process it is an essential step if the plan is to be successful. Based on the experience of CORTS he said there was no cut and dried way of getting public participation but was confident that every effort should be made to involve people in the planning process.

V. Day 3

(a) Setting Objectives in Planning
Mr. H.K. Eidsvik, Parks Canada, Ottawa

Mr. Eidsvik outlined the way in which Parks Canada sets out its objectives and how these are used in a regular reporting system to measure these achievements or non-achievements. He stressed that objectives must be measurable, attainable and have deadlines attached to them. Some of the real operational values of objectives are:

- (i) they provide a base line against which achievements can be measured;
- (ii) they provide a stimulus for an organization or an individual towards greater achievement;
- (iii) they provide direction;
- (iv) they aid coordination.

They are, in essence, a tool to improve the decision making process.

(b) Panel on "Overview" Experience

Members of the Panel included:

- Wayne Fergusson, Industry Development Branch, CGOT
- Jack McKay, New Brunswick, Department of Tourism
- Ed Shaske, Alberta, Travel Alberta
- Hal McGonigal, Ontario, Ministry of Industry and Tourism
- Don Bahnuik, Saskatchewan, Department of Tourism and Renewable Resources
- Neil Nixon, Manitoba, Department of Tourism, Recreation and Cultural Affairs
- Bernie Campbell, Marketing Branch, CGOT.

One of the measures of the Travel Industry Development Program has been directed towards the formulation of tourism development overviews by the provinces. Seven speakers reviewed the process as they had worked with it in their various organizations. Discussion generated by the panel identified the following key points:

- (i) There will be an annual review of the Travel Industry Development Program with the Federal Treasury Board.
- (ii) It is apparent there was difficulty with terminology. Work is being done to see where the "overview" fits into the total planning exercise. As this is being done, the difficult terms will have to be re-defined to make the objectives clearer.
- (iii) The overview should become a dynamic statement of tourism development opportunity at a given point in time.
- (iv) The overview was conceived as a practical shortcut to expedite the planning process.
- (v) There is a problem in getting the other levels of government to consider tourism objectives in their planning and establishing the channel of communication from interdepartmental coordinating groups to the decision, policy and budget-making levels of government.
- (vi) There is a need for evaluation of the economic impact and multiplier effects of tourism investment, employment in spin-off services, not only directly related to hotels and restaurants, but also from gasoline, retail sales and recreation services.

- (vii) A flexible approach to planning is necessary; however, implementation is dependent on a measure of consistency.
- (viii) Aside from the provincial overview, a high priority should be placed on producing a national overview.
- (ix) Public Involvement is a problem. What are the vehicles for obtaining public involvement in tourism planning and implementation given the public interest as a potential investor and probable employee?
- (x) Any proposal on tourism is going to have to take full account, not only of the economic benefits of tourism, but also the social benefits and environmental implications.

(c) Discussion Groups

Five discussion groups were organized to encourage an exchange of ideas between private industry, the provincial and territorial governments, the Canadian Government Office of Tourism and other federal agencies. A period of time was set aside on the first three days for the five groups to meet. Each group was given a list of discussion points from which recommendations were to be made on the final afternoon.

The following is a summary of each group's report and recommendations:

1. The Travel Industry Development Program should be implemented in realistic terms of timing, program setting.
2. The Canadian Government Office of Tourism should know what the planning process is as they see it. This means that a clear definitive document must be developed to help in determining what CGOT is doing in regards to planning — a comprehensive overview encompassing the country as a whole.
3. Any planning, be it in terms of regional, provincial plans or in co-operation as a national plan, should be done in close cooperation with provincial trade associations, community groups, and any members of the private sector that are deemed to be closely associated with the field of tourism.
4. There should be a clear distinction between the planning process and the research process.

5. The provinces should make an effort to recognize provincial departmental frameworks, and how any plan that comes from the tourism jurisdiction within provinces should be implemented within the framework of the provincial government.
6. The type of consulting service capability found in dealing with research universities and planning groups in Canada should be set down in some sort of consulting overview document.
7. There should be greater communication between the provinces and the federal government on the various activities occurring, particularly from the federal/provincial point of view, because of the amount of duplication of effort.
8. Terminology relevant to travel industry planning must be defined.
9. In regard to data, it would seem feasible to establish some sort of clearing house for the information about travel industry research. There could be a telephone enquiry service which would be up to date on the travel industry research being carried out in all parts of Canada.
10. Recommendations for the next seminar were:
 - (a) The provinces should be invited to make suggestions concerning the agenda for the next seminar.
 - (b) The proportion of time for the discussion groups should be increased.
 - (c) The next seminar should be held as a more action seminar, oriented to panel discussions, workshop areas, involvement of the provincial delegates and the private sector.

VI. Day 4

(a) Locating Capital for Development Projects, Part I

(i) G.W. Bethell, Industry Development Branch, CGOT

Mr. Bethell outlined the implementation measure of the Travel Industry Development Program. He emphasized that before implementation could proceed the projects were to be identified as meeting key problems or opportunities as defined in provincial tourism plans. It was pointed out that the program is experimental in that it has to demonstrate that we can develop attractions and facilities that will have significant impacts upon the patterns of tourism in Canada. The program calls for the creation of a few major destination attractions in Canada.

(ii) Mr. D. Clendenning, Industry Development Branch, CGOT

Mr. Clendenning mentioned some of the problems that must be faced in order to attract capital to tourism development and he reviewed the basis for recently commissioned study on the subject. There has been little difficulty in attracting capital to urban areas, but the story has been quite different in rural areas.

He also remarked that any tourism project looking for private financing must compete with other projects coming from other sectors of the economy for the available funds. The soundness of the presentation and demonstrable ability of management and financial viability will be the necessary criteria upon which any decision will be based.

(iii) Mr. E. Burks, P.S. Ross and Associates, Ottawa

Mr. Burks reviewed some of the findings that were emerging from the study being carried out for CGOT on attracting capital. He outlined some of the criteria for success that investors look for:

- (a) uniqueness — the ability to attract people,
- (b) scale — the ability to hold people,
- (c) variety — again relates to holding power,
- (d) communications,
- (e) staff — a dependable labour market,
- (f) management capability,
- (g) reliability and reputation.

(b) Locating Capital for Development Projects, Part II
Mr. B. McDougall, P.S. Ross & Associates, Ottawa

Mr. McDougall described how he and his associates had taken eight typical tourism development projects and discussed them with the private capital market. The result of the discussion appeared to be the identification of four main types of projects:

- (i) A - Major urban developments that are economically viable and do not need assistance from the federal or provincial governments.
- (ii) B - Marginally profitable that do not require financial assistance from government but need help in getting in touch with public and private financial institutions, or in dealing with regulations.
- (iii) C - Developments which should be principally private sector but which require extraordinary government intervention.
- (iv) D - Projects which require major public sector initiative.

VII. The Travel Industry Development Program

Mr. D.C. Bythell, Industry Development Branch, CGOT

Mr. Bythell mentioned that the original TIDP concept and the program, approved in principle by Cabinet, included the notion that those under TIDP would be able to engage in financing assistance through equity participation. The aim of the Federal Government is to introduce flexibility in the manner in which financing terms can be presented and made available to business. Although the Industry Development Bank or the Government have no intention of crowding private sector financing sources at all, it is felt that there must be this assistance in the federal area to development activity for businesses across Canada as the last resort.

Another major change has been the new opportunities program of the Department of Regional Economic Expansion. Up to a few months ago DREE's programs almost totally applied to the Atlantic provinces and to a less extent to the provinces of Quebec, Ontario and much less in the western provinces. Recognized in the DREE-IT&C collaboration basis is the apparent desirability for the overviews to become major sourcing and consultative documents, not only for consideration for any assistance under TIDP from the Office of Tourism, but any federal assistance from DREE and indeed from our federal programs.

The measures of TIDP as of December 1973 are:

1. The important information activity — this industry appears to be very sadly informed;
2. The measure of bringing professional and financial assistance to provinces in formulating tourism development plans — this is fundamental to the whole program;
3. Bringing selective financial assistance for the development of critically needed facilities and attractions, i.e. the implementation of projects;
4. Programs to improve productivity and management standards of private tourism operations and so facilitate access to sources of capital — this includes, for example, the technology improvement program;
5. The establishment of regional tourism offices in key posts across Canada.

VIII. Seminar Summary

Mr. G.D. Taylor, Industry Development Branch, CGOT

When those in the CGOT started to plan this seminar, the objective set was:

"to develop ways and means of translating plans into necessary improvements in Canada's travel industry plant. "

In keeping with that objective the theme selected was "Planning for Action".

Within the four days set aside for the seminar a distinct theme was developed for each day as follows:

- | | | |
|-------|---|--|
| Day 1 | - | Applied Research and Industry Problems |
| Day 2 | - | Planning Techniques |
| Day 3 | - | The Overview |
| Day 4 | - | Making It Happen. |

It was thought there should be a look at the data, research and information required for planning, at the techniques used in arriving at proposed solutions to problems, the role of the overview as a vehicle for expediting planning and development, and finally how development can be made to happen.

One thing that became clear very early was that tourism cannot be looked at in solely economic terms; the social and environmental consequences must be given equal attention. The lead-off speaker, Jack Knetsch, developed the conceptual framework and the rationale for this type of analysis. Mark Doctoroff explained a major new analytical thrust that is designed to provide a framework within which these impacts can be measured. The development of the Tourism Impact Model is seen as an essential tool in developing sound plans and in the evaluation of planning proposals.

Walter Garrett and David Livingstone pointed out the importance of market information and the kinds of market information available. Knowledge of the demand for the products we have to sell or could develop to sell is of prime importance in planning.

Similarly the problems faced by the people operating the industry must be of great concern to planners. John Sibbald gave an insight into some of the problems faced by a segment of the industry.

The problem of how to get on with planning has emerged as a major one. Clare Gunn drew on a wealth of practical experience and academic work to outline with a specific example how a plan for a region was developed. Bill Baker enunciated the essential elements of the planning process while Archie MacKinnon outlined the importance of forward-looking planning and stressed that decisions had to be made without all the facts being available. Howard Richards demonstrated the importance of the map as a tool in locating potential tourist development areas.

Last year at Montebello and again here this year, the necessity of public involvement in the planning and decision making process has emerged as a prime concern. Paul Wyatt discussed a number of techniques of public involvement he used during the course of a major planning study.

Harold Eidsvik set out a practical and logical framework for setting objectives. Planning must be carried out within the framework of clear and attainable objectives. The panel on the overview process gave a clear indication of the amount of work and good hard thinking that has been going on in the past year.

The reports of the discussion groups showed a real desire to get some of the apparent constraints out of the way and to get on with the job of planning and development.

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APPENDIX I

AGENDA

MARCH 19

RESEARCH FOR PLANNING AND DEVELOPMENT

CHAIRMAN: G.D. Taylor

- 09:00-09:15 Welcome and opening remarks - D.C. Bythell
09:15-10:00 Making Data work for Planning - Dr. J.L. Knetsch
10:00-10:15 COFFEE
10:15-11:00 The Economic Impact of Tourism -
A progress report: M. Doctoroff
11:00-12:30 Current Market Research and its application
to planning and development
(a) Air Canada Study - Walter Garrett
(b) U.S. Market Segmentation Study - D. Livingstone
12:30-14:00 LUNCH

CHAIRMAN: E.W. Newton

- 14:00-15:00 Travel Industry Development Problems (TIAC)
Mr. John Sibbald, Chairman, Board of Ontario
Travel Associations representing the Travel
Industry Association of Canada
15:00-15:15 COFFEE
15:15-15:30 Discussion groups - G.D. Taylor (6 groups - to be defined)
15:30-17:30 Discussion groups meet
17:30-17:45 Wrap-up - Dr. J.L. Knetsch

EVENING

- 18:30 Reception and Dinner - National Arts Centre
Host: Canadian Government Office of Tourism
Joining with delegates to the Tour Development Seminar.

MARCH 20

THE PLANNING PROCESS

CHAIRMAN: R.W. Yuel

09:00-10:30	Dr. Clare Gunn - Keynoting Tourism Planning
10:30-10:45	COFFEE
10:45-11:30	Planning Process - Mr. W. Baker - Tourism Consultant
11:30-12:15	The Irrefutable Logic of Planning Analysis - Mr. A.A. MacKinnon
12:15-13:45	LUNCH

CHAIRMAN: P. Klopchic

13:45-14:30	Mapping for Planning - Dr. H. Richards
14:30-15:15	Public Involvement in Planning - P. Wyatt
15:15-15:30	COFFEE
15:30-17:30	Discussion Groups
17:30-17:45	Wrap-up - Dr. Clare Gunn

MARCH 21

THE OVERVIEW PROCESS

CHAIRMAN: R.W. Duncombe

09:00-10:00 Setting Objectives in Planning - Mr. H.K. Eidsvik, Parks Canada

10:00-10:15 COFFEE

10:15-12:00 Panel on Overview Experience -
Messrs. Shaske, Bahnuik, Nixon, McGonigal,
McKay, Campbell, Fergusson.

12:00-13:30 LUNCH

13:30-14:45 Discussion Groups

14:45-15:00 Wrap-up

15:00-15:15 COFFEE

CO-CHAIRMEN: G.D. Taylor, G. Bethell, W. Newton.

15:15-17:00 Recommendations from Discussion Groups,
discussion.

MARCH 22

MAKING IT HAPPEN

CHAIRMAN: G.W. Bethell

09:00-10:00	Locating Capital for Development Projects - I
10:00-10:15	COFFEE
10:15-11:00	Locating Capital for Development Projects - II
11:00-11:30	The Travel Industry Development Program
	Recapitulation/Budgets/Schedule/Co-operative Process
11:30-12:30	Discussion
12:30-	Summary and Wrap-up - D.C. Bythell

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APPENDIX II

TRAVEL INDUSTRY PLANNING AND DEVELOPMENT SEMINAR

(Excerpts from Opening Remarks by D.C. Bythell)

As to Problems & Constraints to Industry Development

... hopefully in your Seminar you may work out solutions or at least see the way to solutions:

1. Most of the "tourism development plan overviews" (TDP's) are still far from being the base documents intended to be; most are still drafts, lacking status as to policy expressions; in most cases, provinces have not yet felt prepared to discuss plans more broadly;
2. from most TDPs the identification and prioritizing of possible projects for implementation remains very tentative. Thus, possible assistance to projects, from federal sources, is difficult to consider;
3. provincial budgets remain a constraint generally — tight for matching grants for plan development; and even tighter for project implementing. Here it should be said that the TIDP budgets of CGOT are available for plan formulation; for technology improvement; for management assistance measures. (As to matching grants for project implementation — based on TDP's, we are in the final process of applying for resources and believe this important matter will be settled clearly within six weeks if not sooner);
4. the organizational / staff back-up for industry development, while improving rapidly, is still a constraint, especially for some provinces;
5. TDPs and tentative projects being identified seem to have a serious lack in the way of market appraisals. Have we really considered our markets and the rapid changes taking place in the needs and desires of today's and tomorrow's tourists? The use of solid data to support these considerations is frequently very shaky. Likewise the submission of valid financial appreciations and income/cost projections leaves much to be desired — and makes for distinct difficulties in attracting financing assistance;

6. a majority of tentative projects submitted relate to governmentally-owned and operated projects — there is in fact a preoccupation in many development plans with governmental actions, with parks, etc. — with proportionately much less thinking going into attracting the interest and involvement of the private sector;
7. not many of us have as yet realized the long and complex road — the time needed alone — from idea conception, through consultation, through feasibility studies, through "go or no-go" decision processes, through financing, through final engineering, through construction, through start-ups — all made not any more simple by the increasingly complex inter — responsibilities of various governments, by considerations of public policy and controls and new needs to carefully relate tourism developments with environmental considerations and guidelines;
8. heavy fog persists over what are likely to be the most suitable, relevant and promising partners one ought to work with to get on with tourism development. For provinces especially the questions remain: which provincial departments should I be working with, which federal departments? ;
9. finally, the conventional financial community is still skeptical as to the potential for investment in tourism-related activities.

In spite of such an array of unresolved questions and constraints, to my mind there is no cause to be discouraged; much progress is being made in industry development. And, I am sure if in your Seminar you can solve at least some of these problems, or see the way to solution, your efforts this week will have been most worthwhile for our industry.

A warm welcome again. Let's go to work!

March 1974

