



CANADIAN TOURISM COMMISSION

Annual Report

1998

Canadian Tourism Commission

Annual Report 1998

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Minister of Industry

For thousands of Canadians the word tourism is much more than part of a vacation plan, it is their basis for a good job and quality of life.

In 1998 alone, more than 500,000 Canadians held jobs related to tourism, and \$47 billion was pumped into our economy. Canada continues to be one of the top 10 world tourism destinations.

These impressive results do not happen by accident. In 1995 the federal government led the process of establishing a partnership of all key stakeholders in the Canadian tourism industry with the hope that we could build on our strengths. The result was the Canadian Tourism Commission (CTC), and the federal government has backed its commitment to tourism with \$221 million over the last four years. With matching contributions from the private sector and other levels of government, more than \$478 million has been invested in an effort to position Canada as the world's premier four-season destination.

Through the CTC, the tourism sector has made great strides in putting Canada on the world tourism map. On behalf of the government I would like to draw particular attention and thanks to the hundreds of volunteers who have given their time freely in assisting the Commission in its work. Many of these individuals are bold, risk-taking people who own their own business and they have been crucial in ensuring that national tourism strategies are responsive to their needs.



It is particularly noteworthy to highlight the progress that has been made by the Commission in promoting e-commerce. The Canadian Tourism Exchange (CTX) is the country's flagship technology for connecting tourism industry players located across the country and around the world.

The Canadian Tourism Commission began as a set of informal arrangements back in 1995. Given the progress that has been made in adding value to the tourism sector, it is clear that the CTC should become a more permanent feature in the government's economic tool kit. As such, I am pleased to confirm my commitment to move forward in establishing the CTC as a Crown Corporation. Legislation has been introduced in Parliament to give the CTC its own legislative mandate.

I am proud to present this annual report to Parliament.

JOHN MANLEY

Chairman of the CTC

We have come a long way in four short years. In 1995, the Canadian government established a new agency to increase Canada's share of the world tourism market. Today, tourism in Canada is booming — thanks in no small part to the untiring efforts of the Canadian Tourism Commission, its staff and partners.

For the third year in a row, Canada ranked in the top 10 tourist destinations in the world reaching eighth position, up one from the previous year, according to the World Tourism Organization. Quite an accomplishment for a country with a 30 million population.

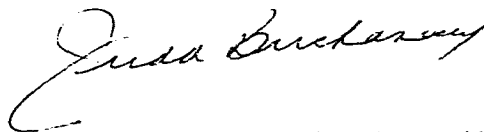
Our efforts have been more successful than even we had anticipated, partly because of an economic boom in the United States, the main source of our foreign tourists. But much of the success is directly tied to our ability to work together to make sure that the CTC remains industry led, market driven and research based.

During the past year the CTC has led the tourism industry in developing a vision and mission statement that help ensure we are all working together toward the same goals. Defining this statement for Canadian tourism has been a remarkable achievement — one that has opened a new world of opportunity for both public and private sector tourism groups.

Now, the task at hand is to begin incorporating the guiding statement and the values and objectives it reflects into industry activities across the country.

The industry vision and mission will challenge all of us to reach our full potential while encouraging and guiding small- and medium-sized businesses. Crown corporation status will strengthen the Commission's board of directors capability to lead the CTC and the industry in realising the vision we all share.

I look forward to continuing our efforts to make Canada the world's premier four-season destination.



The Honourable
JUDD BUCHANAN

World's Top Tourism Destinations — 1998 (International tourism arrivals, excluding same-day visitors)

Rank	Country	Arrivals (thousands)
1	France	70,000
2	Spain	47,749
3	United States	46,395
4	Italy	34,829
5	United Kingdom	25,750
6	China	25,073
7	Mexico	19,810
8	Canada	18,825
9	Poland	18,820
10	Austria	17,352
11	Germany	16,511
12	Czech Republic	16,325
13	Russian Federation	15,810
14	Hungary	15,000
15	Portugal	11,200
16	Greece	11,077
17	Switzerland	11,025
18	China (Hong Kong SAR)	9,575
19	Netherlands	9,102
20	Turkey	8,960

Source: World Tourism Organization



President of the CTC

Life is change, and nowhere was that more evident, in 1998, than at the Canadian Tourism Commission. Just as Canada's tourism industry is maturing, so is the CTC.

This was the first full year in which the international sales staff who previously reported to the Department of Foreign Affairs and International Trade came under the CTC's ambit. It was also a year to plan for the transition of the CTC from a special operating agency of the government to a Crown corporation. Becoming a Crown corporation will help us respond more quickly to changing market conditions, in step with our private sector partners. It will also be easier to recruit and retain the senior people on whose expertise we depend. But the overall formula will remain the same: we will stay a holistic marketing organization for Canada's tourism industry.

The marketing model we use and our ability to attract private industry partners are exciting interest from our national competitors around the world.

Clearly we are doing something right. Our research program is a world leader and is enabling us to produce the data that shows tourism's important and growing role in the Canadian economy.

A Banner Year

Canada's tourism industry contributed a record \$47 billion to the economy in 1998. We can't claim credit for all the industry's success, but the CTC was proud to be able to play a part in it.

The industry's adoption of a vision and mission statement during 1998 was an important step, because it will help ensure that everybody is working together to the same purpose and illuminates the important issues that we face. The CTC was a leader in the process, but the statement itself is an achievement for the industry.

It has taken a lot of work, much of it volunteer, to get us to this point. I want to pay tribute to the many hours of unpaid labour contributed by committee and Board members that have made our success possible. And I cannot slight the efforts, much of it above and beyond the call of duty, by our own CTC staff.

The tourism industry has shown that we can work together both in tough times and in good ones. The challenge is to keep working together all the time, and not relent in our efforts to portray Canada as an exciting tourist destination, both at home and abroad.



DOUG FYFE

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World's Top Tourism Earners — 1998 (International tourism receipts, excluding transport)

Rank 1998	Country	Receipts (US\$ millions)
1	United States	71,116
2	Italy	30,427
3	France	29,700
4	Spain	29,585
5	United Kingdom	21,233
6	Germany	15,859
7	China	12,600
8	Austria	11,560
9	Canada	9,133
10	Turkey	8,300
11	Switzerland	8,208
12	Poland	8,000
13	Mexico	7,897
14	China (Hong Kong SAR)	7,109
15	Russian Federation	7,107
16	Netherlands	6,806
17	Thailand	6,392
18	Korea Republic	5,907
19	Australia	5,694
20	Belgium	5,375

Source: World Tourism Organization

CTC Overview

Industry led. Market driven. Research based.

The Canadian Tourism Commission's goal is simple — convey Canada's abundant natural and cultural assets to a world market hungry for clean, authentic and safe tourism experiences.

To some extent Canada's attractions sell themselves, but only if people outside the country know of them. The CTC's proven industry-government partnership formula leverages the strength of each to:

- raise consumer awareness;
- develop tourism industry products that are world class;
- respond to the needs of increasingly discriminating consumers;
- promote win-win cooperation among the thousands of organizations that make up the industry;
- build a firm, research-based foundation upon which to base business and policy decisions;
- heighten awareness of the tourism industry's scope and scale; and
- earn recognition for tourism's contribution to the economy.

The CTC helps the industry exploit the many opportunities to encourage foreigners — and Canadians — to experience a country which the United Nations has hailed as the best place in the world to live. It does that job well.

Operating through private-public sector partnerships, the CTC promotes Canada supported by a network of offices strategically positioned in its primary markets around the world. Its research program, second to none, produces authoritative analyses that ensure that the industry is recognized for its contribution to Canada's economy, and that marketing programs are aimed appropriately.

Partnership in Action

Governed by a 26-member Board of Directors with representatives from both private and public sectors, the industry contribution to the CTC more than matches core federal government funding. Although it continually exceeds its partnership funding goals, the Commission's success goes much further.

Partnering extends itself through joint public and private sector planning and delivery of tourism initiatives. This Team Canada approach works toward what many refer to as a national or public good: growing tourism expenditures and increasing employment in the industry to benefit Canada.

The Commission's full-time staff in Ottawa and around the world works under the direction of eight program committees. The chairpersons and members of these committees and their respective subcommittees are all volunteers who willingly give personal and corporate time to advancing the cooperative research, product development and marketing actions under the CTC banner.

Five marketing committees cover U.S. Leisure, U.S. Business, Europe, Asia-Pacific, and Canada domestic travel. A new committee, created in 1998, concentrates on the Latin American market.

Two other committees oversee CTC activities that advance the important, strategic interests of the tourism industry.

The Industry and Product Development committee devises, implements and packages Canadian tourism products to help Canada compete with other destinations. It also leads Canada's efforts to become a four-season destination.

The Research committee oversees the production and development of authoritative econometric tools and economic analyses that provide a basis for informed industry decision making.

Mission

To promote the growth and profitability of Canada's tourism industry.

Mandate

To plan, direct, manage and implement programs that generate and promote tourism in Canada.


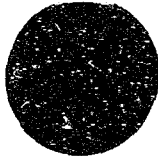


Strategy

To market Canada as a desirable travel destination and to provide timely and accurate information to the tourism industry that assists in their decision making.

Program Budget

1998/1999 Total Expenditures

The CTC receives its core funding from the federal government with the goal of matching it with partners' cash or in-kind contributions. In the fiscal year 1998/99, the CTC spent a total of \$55 million in core funding and \$85 million in partner funding for a total of \$140 million, not including salaries. Of this amount, 87.9 per cent was directed at stimulating international and domestic demand, 4.2 per cent to enhance industry competitiveness and 7.0 percent to provide corporate and information services.

	Core	Partners		Total	% of total
Marketing Operations/Sales	\$45,638,749	\$77,531,965		\$123,170,714	87.9%
U.S. Leisure Travel	\$16,505,037	\$17,677,496		\$ 34,182,533	24.4%
U.S. Meetings and Incentive Travel	\$3,700,350	\$3,831,300		\$ 7,531,650	5.4%
Canada	\$4,249,870	\$14,337,165		\$ 18,587,035	13.3%
Europe	\$10,353,867	\$22,248,636		\$ 32,602,503	23.3%
Asia-Pacific	\$10,065,282	\$16,940,107		\$ 27,005,389	19.3%
Latin America	\$764,343	\$2,497,261		\$ 3,261,604	2.4%
Industry Competitiveness	\$2,925,383	\$2,907,497		\$5,832,880	4.2%
Industry & Product Development	\$2,280,630	\$2,747,997		\$ 5,028,627	3.6%
Business Development	\$327,315	\$159,500		\$ 486,815	0.3%
Aboriginal					
*funds accounted for in other programs	\$317,438	— *		\$317,438	0.2%
Corporate and Information Services	\$5,134,368	\$4,639,050		\$9,773,418	7.0%
Research	\$2,283,372	\$4,639,050		\$ 6,922,422	4.9%
Corporate Services	\$1,774,623	—		\$1,774,623	1.3%
CTX	\$1,076,373	—		\$1,076,373	0.8%
Office of the President	\$1,343,098	—		\$1,343,098	0.9%
TOTAL EXPENDITURES	\$55,041,598	\$85,078,512		\$140,120,110	100%
SALARY	\$11,560,155			\$11,560,155	

Vision

After the CTC successfully reached its original goals in just two years, the private and public sector members of the Commission embarked on a review of the industry and an analysis of long-term needs.

Striving to establish a clear direction for tourism, they deemed that a common vision for the entire industry was critical. A committee on the tourism industry's vision and mission was struck under the chairmanship of Robert S. DeMone. This 20-member team of industry experts was the catalyst in bringing together key public and private sector partners.

After several months of deliberating and research, this volunteer committee prepared a statement to present to the industry.

The committee presented the vision and mission statement in Toronto in June 1998 to about 130 industry stakeholders representing most industry sectors in Canada, as well as provincial and territorial governments, and destination marketing organizations. Other meetings took place across Canada to get consensus on a shared vision and mission for the future of Canadian tourism.

After successfully reaching consensus on the vision and mission, participants were encouraged to apply those guiding statements to their strategies and tactics. The CTC's own Strategic Plan 1999-2000 is grounded on making Canada the premier four-season destination.

Vision

Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.

Mission

Canada's tourism industry will deliver world-class cultural and leisure experiences year-round, while preserving and sharing Canada's clean, safe, natural environments. The industry will be guided by the values of respect, integrity and empathy.



Photo credit: Steve Shaw

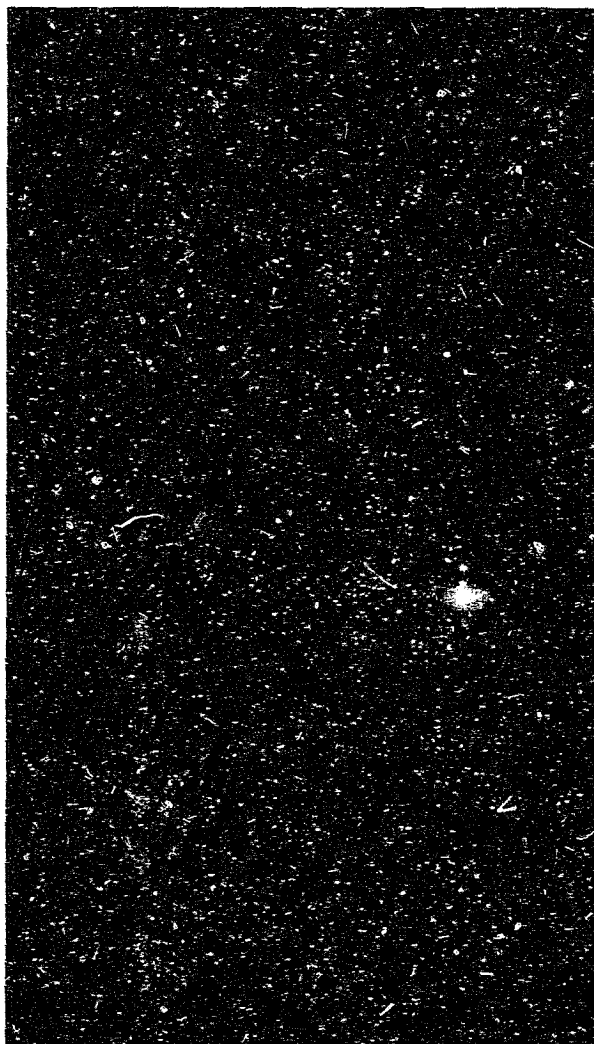
Research

Focus

Until recently, most of the tools that clearly define and accurately measure the supply side of tourism industry performance simply did not exist. CTC's Research Program had to create them in partnership with Statistics Canada's National Income and Expenditure Accounts. The result: Canada is the first country to put its tourism industry economic reporting on a par with its other industries. Canada now has the best supply in the world of accurate data on its tourism industry. No country offers as sound a foundation for well-informed business and policy decisions. Indeed, several other countries are adopting the Canadian research model as a yardstick for their own tourism industry.

Actions

CTC Research worked with Statistics Canada to guide the production and ongoing development of the industry's five flagship econometric tools: the Tourism Satellite Account, the National Tourism Indicators, the International Travel Account, the International Travel Survey and the Canadian Travel Survey. In particular, the National Tourism Indicators, based on the Tourism Satellite Account, draw upon vital tourism-related data to generate reliable indicators of tourism demand and supply. In addition to providing regular reports on industry performance, these econometric tools form the basis for a wide range of CTC-sponsored economic analyses that improve the understanding of the industry and help to identify opportunities to improve growth and profitability.



Results

CTC published the world's first long-term study of the industry's performance, which showed that tourism is a growth leader, outperforming the overall Canadian economy. It also produced a study that, for the first time, provided an accurate picture of the industry's extreme – though far from uniform – seasonality, providing a baseline for assessing the CTC's progress in off-season revenue development. CTC also produced two videos to show small businesses why and how they can gain by using tourism research findings. Funding by CTC partners reached nearly double its core research budget during 1998, a welcome endorsement of the CTC Research program.

Challenges

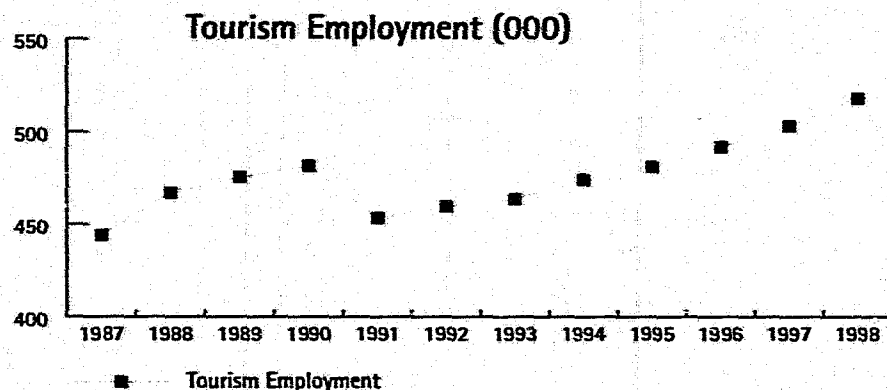
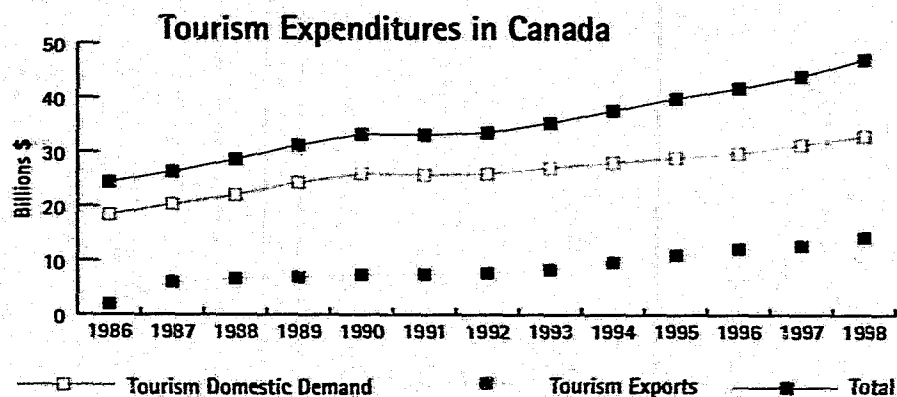
Tourism research still needs more private sector involvement. Communicating research findings is another challenge, as is the task of finding an easier way for outsiders to tap the huge volume of economic research findings at CTC's disposal. In addition, a tremendous amount of work remains to be done in order to enable CTC to tabulate information on a province-by-province or city-by-city basis.

Look Ahead

During 1998, CTC Research also laid the groundwork that could eventually enable it to begin to report on tourism's role in job creation. A study is underway to show the makeup of the tourism labour force and to gather more information about seasonal versus year-round employment of its various members. Work is also continuing on harmonizing tourism statistics between different countries, with Canada leading the way as Chair of the World Tourism Organization Experts Committee on Tourism Satellite Accounts.

Contribution to Economy

In 1998, the Canadian Tourism Commission published a ground-breaking study, written by University of Waterloo tourism economics expert Prof. David Wilton, of Canada's tourism industry performance. For the first time, the industry had an accurate picture of its long-term contribution to the Canadian economy. The study showed clear growth in both domestic and international tourism expenditures in Canada, as well as direct employment attributable to tourism demand.



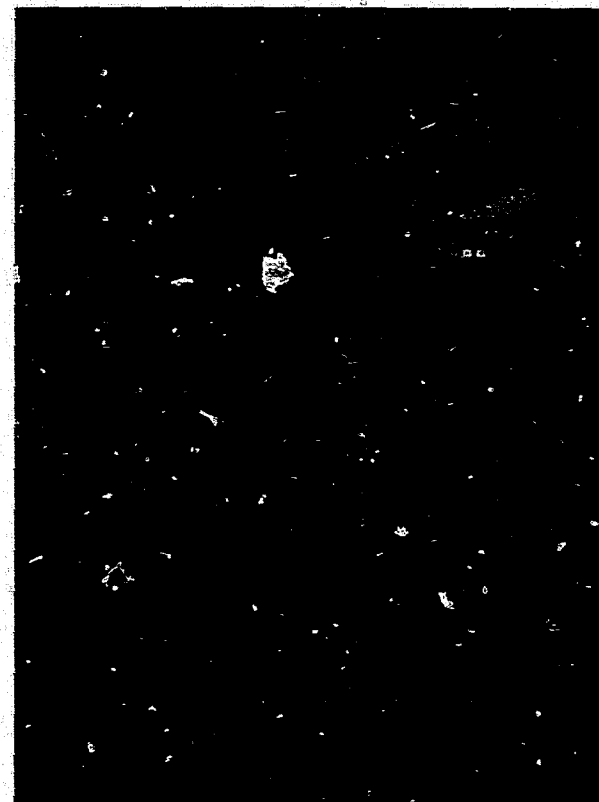
Industry & Product

Focus

Making sure that Canada's tourism industry can compete globally in an increasingly crowded and noisy world tourism market, and developing Canada as a four-season destination is the job of the CTC's Industry and Product Development group.

Actions

Industry and Product Development works with the tourism industry to develop new and appealing experiences — and to package those experiences for export — helping CTC partners to attract many more



Development

tourists from around the world than would otherwise be possible. Industry-led subcommittees form the basis for in-depth study of specific tourism opportunities. Current subcommittees include winter tourism and adventure-ecotourism travel. A subcommittee on cultural and heritage tourism helped more parts of this sector reach international standards. The Product Clubs program, fostered by the CTC, helps small- and medium-sized businesses do the research, forge the partnerships, and undertake the development activities necessary to get new products market-ready. The Product Clubs program has proved a resounding tourism industry success. Many product clubs are finding their developing products can achieve a market presence that had previously only been attained by large organizations.

Results

The tally of product clubs reached 18, including six mid-way through what is typically a three-year cycle, an additional six clubs no longer receiving financial support but maintaining an ongoing relationship with the program — the “graduates”, with six new clubs formed during 1998: the Bay of Fundy club; an urban cultural tourism club in Vancouver; a heritage club operating in Western and Northern Canada; Quebec-based clubs focusing on adventure tourism and cross-country skiing; and a northern wilderness product club. Industry and Product Development also published the country's first comprehensive guide to sources of financing for tourism businesses. In addition, the group prepared a paper on sustainable development and tourism in Canada for the United Nations Commission on Sustainable Development. The document was posted on the CTC website for industry comment.

Challenges

Seasonality is the main challenge for the Canadian tourism industry, and an integral part of the industry vision formulated during 1998. Forty-four per cent of Canada's visitors arrive during summer, when major cities, resort areas and transportation carriers are often fully booked and must turn away business. A limited supply of internationally competitive packages is another concern, as is access to finance and investment, especially outside major cities.

Look Ahead

Immediate goals include promoting the use of technology by the industry; developing means to continue to raise the quality of Canadian products; the creation of six new product clubs to complement the 18 already in action; and an initiative to develop CTC and the Canada brand awareness.

MasterCard

MasterCard International and the CTC signed a strategic alliance in 1998. The strategic alliance will help small- and medium-sized Canadian Tourism Commission partners by:

- Creating professional development programs through in-market seminars, case studies, self-help guidelines and interactive CD-ROMS;
- Engaging in joint research to identify market segments by developing business profiles and pre-testing marketing and promotional campaigns; and
- Developing and adopting technology related to commercial tourism transactions.

The agreement also calls for MasterCard to integrate Canada into existing and prospective MasterCard promotions. MasterCard member banks, Canadian MasterCard merchants and MasterCard cardholders around the world will benefit from value-added products and services.



Marketing Overview

World tourism is big business – more than half a trillion dollars at last count – and the CTC's job is to make sure Canada gets its share of that vital revenue. Working through marketing campaigns and sales agents in the world's most important markets, the CTC ensures that people get to hear the story of Canada's attractions: great open spaces, magnificent scenery, world-class cities, diverse cultures and friendly people.

CTC marketing aims to:

- promote the Canada brand as a four-season destination;
- keep Canada ahead of the pack in research on customer needs;
- hone the effectiveness of CTC's worldwide sales network; and
- demonstrate that CTC partnership helps the industry gain access to niche markets that will maximize profits by bringing in incremental business.

In order to do this, the CTC is taking closer control of the advertising process to ensure that all the ads around the world effectively sell the Canada brand look.

The CTC's mandate as a marketing organization is to generate international and domestic tourism revenue in Canada. In an increasingly crowded world, competition for attention of consumers is intense. This is especially true in tourism.

The world market for tourism is growing quickly. But as new tourism destinations come on stream and as consumers are inundated with more and more advertising and marketing messages from both traditional and new media, it is a fight just to stay in place in terms of popular awareness.

It is another battle to ensure that the packages are in place to deliver the type of experience consumers want once they have decided to visit Canada, and making sure that they have easy access to these packages. With the growth in the use of the Internet and an increase in travellers booking vacations directly themselves, marketing challenges have increased.

International Travel Account 1994-1998 (millions \$)

	1994	1995	1996	1997	1998
Receipts*	9,558	10,819	11,749	12,221	13,935
Payments**	13,678	14,093	15,345	15,871	15,955
Balance	-4,120	-3,274	-3,596	-3,651	-2,020

* Spending in Canada by International Visitors

** Spending by Canadians outside of Canada

Tourism in Canada 1996-1998 (000s of trips)

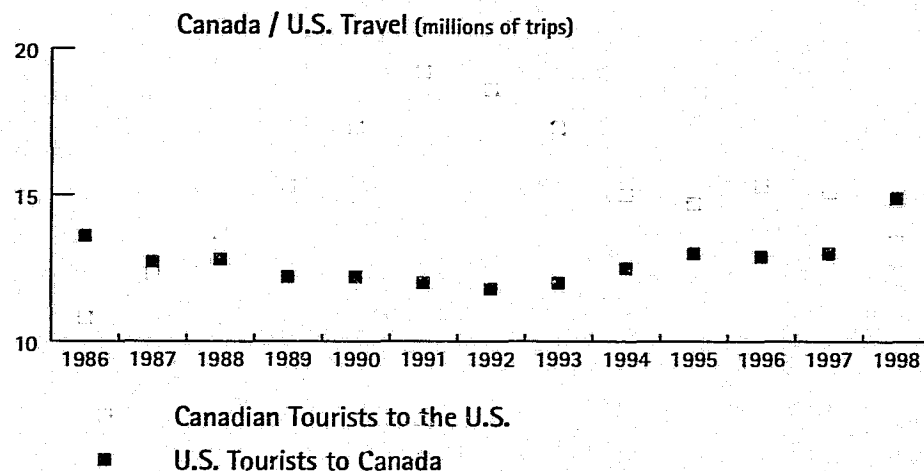
Year	Foreign	Domestic*	Total
1996	17,285	71,585	88,870
1997	17,636	65,727	83,363
1998	16,828	74,409	93,237

* In 1996, changes were made in the survey methodology for domestic travel making comparisons to previous years inappropriate.

Staying in the forefront of the world tourism market requires constant vigilance and ingenuity to deal with ever-changing challenges. Some of the challenges that the CTC faces are:

- keeping on top of changing conditions in Canada's primary market for leisure and business travel: the United States;
- maintaining Canada's share of traditional markets in Europe despite a sluggish European economy;
- sustaining a presence in Asia and the Pacific during the economic downturn in that region;
- expanding into new markets in Latin America;
- ensuring that Canadians, who provide the backbone of Canada's tourism industry, are kept aware of the continuing attractions of their own country.

The CTC is working hard in conjunction with its partners to make sure that these challenges are changed into opportunities.



International Tourist Arrivals 1994-1998 (000s of trips)

	U.S.	U.K.	Japan	France	Germany	Overseas Total	Total Arrivals
1994	12,542	577	481	410	367	3,429	15,972
1995	13,005	641	589	430	421	3,927	16,932
1996	12,909	691	648	460	447	4,377	17,285
1997	13,401	734	566	439	398	4,234	17,636
1998	14,893	747	484	402	379	3,935	18,828

International Tourism Receipts 1994-1998 (millions \$)

	U.S.	U.K.	Japan	France	Germany	Overseas Total	Total Spending
1994	4,396	484	549	412	389	3,346	7,742
1995	4,799	565	661	460	498	4,038	8,837
1996	5,150	641	690	498	508	4,520	9,670
1997	5,355	687	643	472	440	4,516	9,871
1998	6,703	824	520	487	441	4,462	11,165

1998 Market Performance

1998 Tourism Performance

Inbound Trips to Canada

From	Trips (000)	Change (over 1997)
U.S.	14,893	+11.1%
Overseas	3,935	-7.1%
Europe	2,211	-2.2%
Asia	1,115	-19.0%
Other	609	+1.7%
Total	18,828	+6.8%

Outbound Trips by Canadians

Destination	Trips (000)	Change (over 1997)
U.S.	13,430	-11.2%
Overseas	4,218	+5.9%
Total	17,648	-7.6%

International Travel Account

Transaction	Amount (millions \$)	Change (over 1997)
Receipts	13,935	+14.0%
Payments	15,955	+0.5%
Balance	-2,020	-44.7%

U.S. Leisure Travel Market Performance

	1997	Target 1998	Change	Results 1998	Change
Visitors (000)	11,302	11,639	+3.0%	12,539	+10.9%
Revenue (billion \$)	4.03	4.25	+5.4%	5.04	+25.1%

Canada Travel Market Performance

	1997	Target 1998	Change	Results 1998	Change
Visitors (000)	65,700	68,400	+3.5%	74,400	+13.2%
Revenue (billion \$)	13.1	13.5	+3.1%	15.4	+17.0%

Intraprovincial Travel

	1997	Target 1998	Change	Results 1998	Change
Visitors (000)	52,200	n/a	n/a	59,500	+13.9%
Revenue (billion \$)	6.8	n/a	n/a	8.0	+17.4%

Interprovincial Travel

	1997	Target 1998	Change	Results 1998	Change
Visitors (000)	13,500	n/a	n/a	14,900	+10.4%
Revenue (billion \$)	6.3	n/a	n/a	7.4	+16.6%

U.S. Business Travel Market Performance

	1997	Target 1998	Change	Results 1998	Change
Visitors (000)	2,099	2,195	+4.6%	2,353	+12.1%
Revenue (billion \$)	1.3	1.4	+2.1%	1.7	+25.8%

Europe (plus Israel) market performance

	Target			Results	
	1997	1998	Change	1998	Change
Visitors (000)	2,330	2,330	nil	2,273	-2.4%
Revenue (billion \$)	2.4	2.5	+4.6%	2.6	+6.7%

Asia-Pacific (minus Israel) market performance

	Target			Results	
	1997	1998	Change	1998	Change
Visitors (000)	1,505	1,407	-2.3%	1,240	-17.6%
Revenue (billion \$)	1.7	1.7	nil	1.4	-15.7%

Latin America (Argentina, Brazil and Mexico) market performance

	Target			Results	
	1997	1998	Change	1998	Change
Visitors (000)	174	195	+12.1%	191	+9.8%
Revenue (million \$)	209	234	+12.0%	253	+21.0%

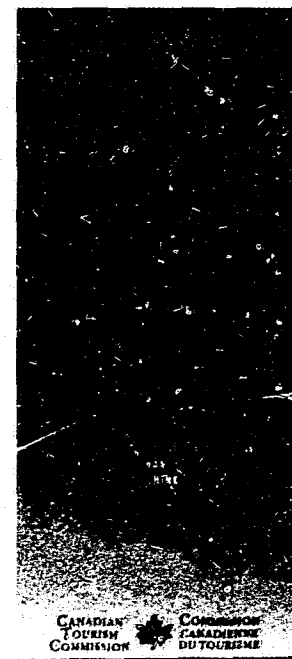
Americans return in record numbers

The record number of Americans who visited Canada during 1998 augurs well for recurring revenue. For Americans, visiting Canada only once is a bit like trying to eat only one salted peanut: once they get a taste of Canada, they tend overwhelmingly to return. Nine out of every 10 Americans who visit Canada are repeat visitors.

Why? Canada offers what Americans want: safe, clean cities, exciting attractions, plus the great outdoors second to none. Canada is very much an adult destination with proven appeal to retiring U.S. baby boomers with lots of disposable income to spend. Almost 70 per cent of Americans who visit Canada are 35+, including more than 20 per cent who are about-to-retire boomers 45-54, the largest single age group.

During the next decade, these boomers stand to inherit some US\$10 trillion from their parents' generation and will have ample leisure time to fulfill their travel dreams. Currency volatility has played a role in the increasing number of U.S. tourism dollars being spent in Canada. However, marketing surveys consistently show that only about 20 per cent of American potential visitors — and about 40 per cent of repeat visitors — are aware of the exchange rate. Instead, they base their decision to travel to Canada on the perceived quality of the experience.

Most learn about attractive exchange rates only after arriving in Canada and, once they do, they tend both to spend more and stay longer. Indeed, credit card firms and hotels alike report of U.S. clients calling after returning from Canada, concerned that they have been undercharged for their bills, when in fact their transactions have been converted from Canadian to U.S. dollars at very advantageous rates that had not been drawn to their attention earlier.



U.S. Leisure

Focus

The U.S. leisure travel market is, by far, the biggest and richest in the world, and it's close by. Canada offers the authentic, safe and natural travel experience that many Americans desire, with its emphasis on outdoor attractions and exciting cities. In 1998, Americans accounted for some three-quarters of all foreign tourists to Canada; spending by tourists from the U.S. topped \$6.7 billion in 1998 — more than sixty per cent of all tourism dollars spent in Canada.

The CTC aims to increase the number of U.S. visitors — in particular, affluent baby boomers, middle-age and mature travellers — by producing a fully-integrated, focused and cost-effective marketing program that will let its partners close sales. Another objective is to create more programs in all seasons that will attract visitors, while the CTC also aims to develop a 50-50 partnership with industry in all of the marketing programs.

Actions

The Canada specialist program which certifies participating travel agents as experts in Canada was introduced to the U.S. at the annual meeting of the American Society of Travel Agents.

The CTC sales force in the U.S. has been restructured to give sales agents better training, more focus and measurable targets for sales calls and objectives. Media relations functions in the U.S. are also being restructured.

Results

Tour operators responded positively to new winter programs, and a direct mail campaign was successful on the East and West coasts, producing a highly qualified data base.

Overall, the program was more targeted and cost effective with trackable results, creating an environment for CTC partners to close the sale.

Challenges

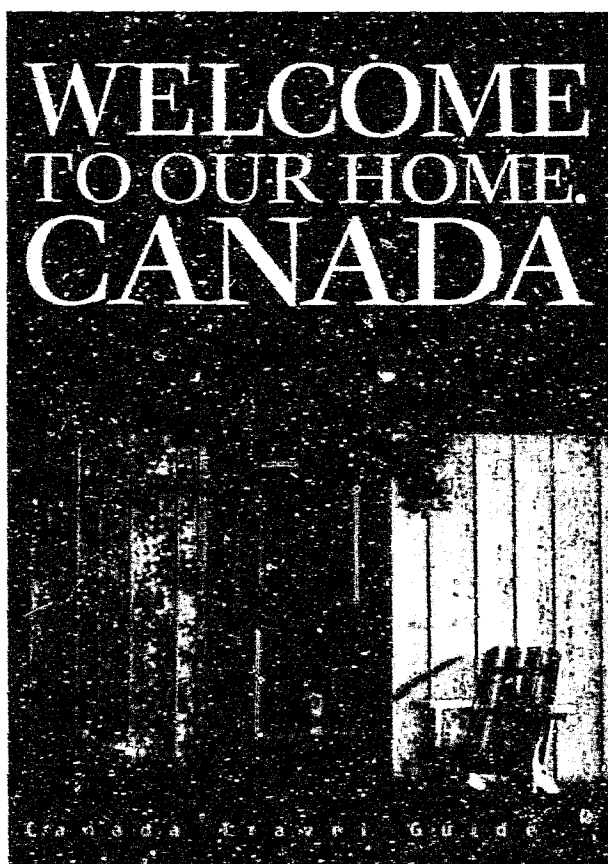
The size of the U.S. market and the cost of advertising remain major obstacles, particularly in the wake of the sharp decline of the Canadian dollar during 1998.

Increasing the number of partners, particularly non-Canadian partners, in this lucrative market is another continuing objective, as is reaching beyond Canada's traditional border-state markets into the fast-growing economies of the South and West.

Look Ahead

The CTC's 1999 U.S. marketing program will have a new theme: authenticity. Canada offers a wealth of authentic vacation experiences, notably in nature and outdoor adventure.

The continuing boom in the U.S. economy and a favourable exchange rate for the Canadian dollar for at least the next year or two will make Canada an attractive destination for Americans into the next millennium.



U.S. Meeting & Incentive Travel

Focus

A booming U.S. economy, record corporate profits and a low Canadian dollar proved to be a magnet for U.S. business travel in 1998. Revenue from U.S. business travel jumped 25.8 per cent to almost \$1.7 billion and the number of visitors rose 12.1 per cent to nearly 2.35 million, compared with the previous year. Both exceeded CTC targets, acquainting a record number of American business people with Canada's safe, clean and convenient cities and resort areas.

Actions

The CTC reorganized its U.S. sales force, giving it a more strategic focus with measurable goals and well-defined expectations. The Committee overseeing these programs has focused its priorities and has developed programs that have been able to attract smaller partners.

Results

Canada attracts nearly one-third of U.S. corporate meetings held outside the U.S. and more than one-third of association meetings outside the U.S.

Incentive travel is a subset of the corporate meeting segment. At \$5.3 billion, it is the smallest of the three target segments, yet it is high yield and internationally mobile. Spending averages over \$2,250 per trip. Partnership contributions increased by 42 per cent during 1998, largely because of the development of a general guide targeting all segments of U.S. meeting planners.

Challenges

U.S. convention groups are growing in size leaving fewer Canadian cities able to accommodate them. A number of cities, however, are building the necessary facilities which will become available over the next few years.

There is also strong competition in this lucrative market from an increasing number of overseas destinations, such as the United Kingdom and Australia. In addition, the decline of the Canadian dollar has driven up dramatically the cost of advertising and sales promotions in the U.S.

Challenges in sustaining and increasing partnership remain due to the rationalization of financial resources for tourism marketing from municipal governments.

Look Ahead

Cooperative marketing programs are being developed in conjunction with such cities as Toronto, Montreal, Calgary, London, and Vancouver that will serve as a conduit linking meeting planners with these cities. Because Canada still suffers from a lack of awareness among American meeting planners, image ads in trade publications and direct mail promotions will help to move Canada up on the list of must-see locations.



Canada

Focus

Canada can provide plenty of appealing vacation experiences, as Canadians are well aware.

Canadians are Canada's tourism industry's biggest customers. Their numbers are increasing, partly because the Canadian dollar now buys less foreign currency, but also because Canadians are becoming even more aware of the opportunities available in their own country.

Actions

The CTC's goal in this market in 1998 was to hold outbound travel by Canadians at 1997 levels, and to increase domestic travel by Canadians by three per cent.

Results

1998 was a record-breaking year for domestic tourism, which rose 13.2 per cent. Outbound travel to the U.S. dropped by 11.2 per cent, although overseas travel increased by 5.9 per cent for an overall decrease of 7.6 per cent. Partner buy-in to programs was also very strong, almost double the goal of \$7.5 million. This program has the most enthusiastic partner financial support of any CTC program: partners contributed almost triple the CTC's 1998 core budget.



Photo credit: Martin Lipman

Challenges

Response to the adventure travel program fell below expectations. Programs still need to be tailored to suit tour operators, most of which are small operations. Developing sufficient, appealing packages for domestic travel remains an ongoing challenge, as well.

In addition, strong economic growth will fuel Canadians' pent-up demand for foreign vacations which, at some point, will likely override the decline in their currency's value, and the number of Canadians travelling to the United States will increase.

Look Ahead

Plans are underway to develop new packages that will be promoted to Canadians for interprovincial travel.

Home Hardware-VIA Rail

More than 500,000 Canadians took part in a CTC-sponsored contest last year, hoping to win a rail trip from Prince Rupert, B.C., to Halifax, N.S. The contest was organized in partnership with Home Hardware and VIA Rail Canada. Entries were available at 950 Home Hardware stores across Canada, along with a specially designed Rediscover Canada travel guide which contained discount coupons for more than 150 attractions, restaurants, tours and accommodation throughout the country.

The contest was supported by eight weeks of print and television advertising. Winners were chosen from each province in June 1998 and departed Prince Rupert, on their trip, September 25. Journalists travelled with the winners and the CTC organized special events at various points en route. They reached Halifax, October 12, after garnering media coverage all along the way.

More than 1 million Rediscover Canada guides were distributed through Home Hardware Stores and VIA Rail train stations, and let more than 150 small tourism businesses participate in a major national promotion with the CTC at no cost, except for the discount coupons.

Europe

Focus

In this mature market, Canada's focus continued to be to improve its competitive position and target high-spending visitors, especially in the three major markets of the United Kingdom, France and Germany. Together, these countries account for more than 70 per cent of European visitors to Canada. In 1998, the number of Europeans visiting Canada fell slightly, to 2.2 million from 2.3 million in 1997, but spending by Europeans rose, to \$2.6 billion, exceeding the CTC's objective.

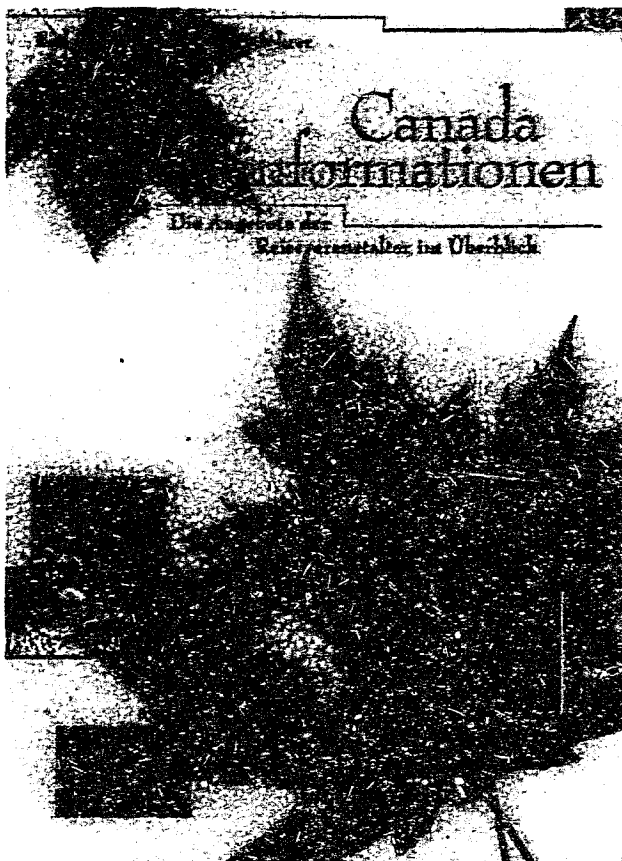
Actions

For the first time, Western Canadian partners participated in the television ad campaign for the United Kingdom. New partnerships were formed with tour operators in the U.K. Print ad campaigns in both the U.K. and Germany exceeded response targets. There was an increase of 46 per cent in partnerships with provinces and territories and an overall increase of \$1.2 million in partnerships. In the U.K., more than 400 travel agents have now been trained as Canada specialists. Partner spending on the European program now more than doubles the CTC's contribution to the program.

Results

The decline in the number of outbound tourists from Europe, likely due to the 1998 runup to a single currency for most of Europe, has been mitigated. Europe's economy now seems set to rebound, and Europeans coming to Canada have been spending more, in line with the CTC's objective.

The establishment of in-market committees in Europe is providing invaluable intelligence on developments in this very rich market. There has been continued success in attracting non-traditional partners, especially in France and Germany.



Challenges

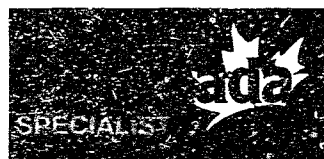
Australia and the United States are Canada's main competitors in the European market, and they spend more on advertising than Canada does. Asian countries are also strong competitors, and recent declines in the value of their currencies have allowed them to offer deep discount packages. Integrating smaller partners in European ad campaigns continues to be a challenge.

Look Ahead

The CTC is planning a new television advertising campaign this year in response to recommendations from its committees both in Canada and in-market. It will be a dynamic image commercial with direct response that will run in prime time as well as off-peak in an effort to build awareness of Canada's many attractions. The Canada Specialist Program, which originated in the U.K., is expanding rapidly in France and Germany.

Canada Specialists

The success of the Canada Specialist program for travel agents in Britain has prompted CTC to adapt it to the United States, France and Germany.



It is aimed at selected travel agents who are invited to join with the CTC and its members in promoting Canada. In Britain, 400 of these Canada Specialists have already been trained and are busy selling Canada.

Providing qualified business leads to travel agencies is one aspect of the program. CTC advises member agents in advance of advertising and promotional events in their area, and supplies them with material to respond to customers who call. Canada Specialists receive full support from CTC field offices, familiarisation trips to Canada, product knowledge seminars and local identification as a Canada Specialist.

Wherever this program is up and running, CTC field offices can give CTC partners world-class support through the use of technology and closely integrated products. This lets the industry bring front-line, in-market sellers to its highly diverse range of products much more easily than many other destinations can.



Colours of Canada

A highly successful advertising campaign for Japan portrayed the splendour of Canada's seasons with Red Canada — Yellow Canada — White Canada — Blue Canada. It tapped into the strong Japanese affinity for colours and emphasized Canada's year-round appeal.

The campaign was part of the \$18.8 million that CTC partners spent advertising in Asia and the Pacific. Based on the appeal of Canada in all four seasons — white for winter, blue for spring, yellow for summer and red for fall — it was designed and executed by Dentsu Young and Rubicam of Tokyo, in conjunction with Vickers and Benson Advertising Ltd. of Toronto.

The campaign included ads in the Tokyo subway that reached two million commuters, billboards and ads in Japanese newspapers, magazines and travel trade publications.

The ads were well-accepted by the trade in Japan and earned a Japanese advertising award. The winter campaign alone generated more than 5,000 direct responses.

Asia-Pacific

Focus

As Asian economic troubles continued during 1998, both the number of Asian tourists visiting Canada and the revenue from Asian tourists declined, as did outbound travel from Asia in general. Canada remains high on many Asians' travel wish list — particularly the Japanese — but they are becoming more price-conscious.

Canada's appeal in this market is its outdoor icons, uncrowded wilderness, friendly service and the Anne of Green Gables mystique: the famous Canadian novel is one of the first books read by Japanese who study English.

Actions

The CTC and its partners launched a very successful Colours of Canada ad campaign in Japan, utilizing both the Tokyo and Osaka subway stations and other media to rise above the city hubbub and attract attention. The campaign for winter programs was also relatively successful in Japan, a country that accounts for some 70 per cent of visitors to Canada from Asia. The CTC opened several new offices in Asia during the year, indicating its commitment to this growing market for the long haul. Offices were opened in Osaka to serve the Kansai region and southern Japan, and in Hong Kong, one of the few Asian markets where tourism to Canada is still growing. In China, a developing market with enormous potential, the CTC has initiated efforts towards obtaining preferred destination status which will enable Chinese citizens to use private passports when visiting Canada.

Results

The number of visitors from Asia-Pacific dropped to 1.2 million, and revenue from these visitors dropped to \$1.4 billion. Both figures were down about 20 per cent from the previous year. Partnership contributions to the program were almost double the forecast amount because of the CTC's participation with a consortium in Japan.

Challenges

The main barrier for Canada in Asia is the perception that it is an expensive destination which needs to become more price competitive with the U.S., Europe and Australia, its main rivals in this important market.

Look Ahead

Goals for the immediate future are modest because of the region's continuing economic difficulties. Marketing programs in the Asia-Pacific region will minimize the decline in earnings by targeting high-spending travellers, with the aim of holding 1999 revenue steady at around \$1.4 billion. There are signs that the economic picture might be improving, especially in Japan. Total outbound travel from Japan increased in February 1999 for the first time in 16 months.



Latin America

Focus

Latin America is an emerging market with good growth potential. Canada's outdoor adventures, clean air, economic and social stability, safety, great shopping and exciting cities are all very attractive to visitors from south of the U.S. border.

Actions

The CTC is concentrating in this market on the three large countries — Mexico, Brazil and Argentina — which account for most of the visitors from this region to Canada. In this developing market, the CTC works mainly with the travel trade to increase awareness and product knowledge through trade shows.

Results

The number of visitors and revenue were both up in 1998 over the previous year. Despite the sharp devaluation of the Brazilian real, visits to Canada rose 5.5 per cent. Latin Americans are among the biggest spenders of any tourists coming to Canada, averaging \$1,326 per trip. The industry has been quite supportive of CTC's initiatives in this market: recruitment of Canadian partners in travel trade development initiatives exceeded CTC's target, and in-market partnership participation tripled during the past year.



Challenges

Building awareness of Canada's many attractions is the main challenge in Latin America. Wealthy Latin Americans habitually visit the U.S. and Europe, but few of them know much about Canada. Latin Americans tend to be independent rather than group travellers, and many prefer last-minute bookings because of fluctuations in currencies and inflation rates. Visa requirements also present a hurdle to increased tourism, particularly for Argentinians.

Look Ahead

Advertising will shift toward consumers in Brazil and Argentina, where efforts up to now have concentrated on the travel trade. The CTC's goal is to increase arrivals by 6 per cent and revenue by 10 per cent from this region in 1999.

Tourism market volatile south of Rio Grande

The market for Latin American and Caribbean visitors to Canada is highly paradoxical. This small but lucrative market — which produces Canada's highest revenue per tourist — jumped by nearly two-thirds from 1990-1997.

Average spending per visitor is up 44 per cent, although the small size of the market, in relative terms, means that the region's overall contribution to Canada's tourism industry revenue only edged up from 3.8 per cent to 4 per cent. However, domestic economic growth is the main engine that drives tourism, and the region remains highly vulnerable to runaway inflation, with the prospect of widespread currency devaluations.

This has a double-whammy effect: driving up travel costs just as residents have less money to spend. Sagging currencies and unchecked inflation will give Latin American tourists incentive to choose destinations close to home. In addition, competition for the remaining travellers is expected to heighten dramatically, as new destinations in low-cost nations come on stream.

Corporate Services

Competitive Information

The Canadian Tourism Exchange (CTX) pilot project continued to develop as a way for tourism industry operators to begin communicating, interacting and sharing information with each other and with the CTC through the Internet-based system. Use of CTX, free to those working in tourism, is expected to improve access to tourism news, industry reports, business opportunities and a products and services database.

The CTX emerged from, and has its roots in, the organizational transition of the CTC. Following its formation in 1995, the Commission began exploring better avenues of communicating with the industry. This led to the development of an online business-to-business system that evolved into the CTX pilot.

When rolled out later in 1999, the CTX, the first of its kind in the world, will be the flagship technology network for the Canadian tourism industry.

canadatourism.com

Every month more and more visitors access information about Canada's tourism industry through the CTC's new website, www.canadatourism.com, inaugurated in 1998.

The Travel Canada section of the website links to each of the provinces and territories and to about 2,000 related tourism sites offering detailed information on everything from bed and breakfasts to nature trails and jazz festivals. Statistics show that 80 per cent of site visitors seek information on leisure travel. The CTC Partner Centre provides industry and public alike with information on CTC and its programs.

TRDC

The CTX has improved the availability and use of the CTC's Tourism Reference and Documentation Centre (TRDC). The TRDC's electronic industry research tools are now at the disposal of a record number of CTC partners, who posed more than 5,000 reference questions during 1998. In addition, the TRDC now publishes electronically its weekly highlights of

industry developments and, in 1998, created a comprehensive guide to sources of tourism information. In an independent survey, CTC partners reported a very high level of satisfaction with TRDC services.

Communications

Part of the CTC's mandate is to provide partners and the industry at large with accurate and timely information to help in their business decision making. The Commission has gained increasing support and respect in this area through *Communiqué, Canada's Tourism Monthly*, published in both print and electronic formats.

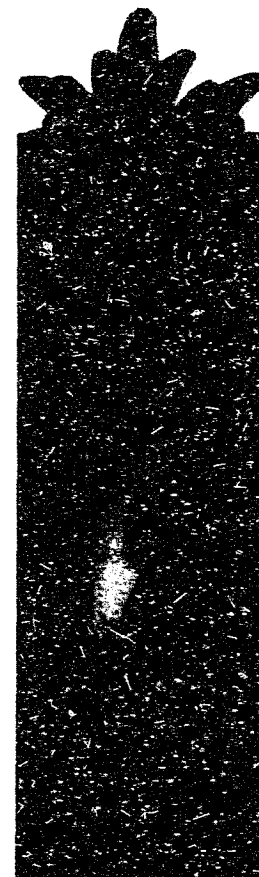
Like all CTC programs, this industry-wide tourism trade journal is the fruit of private-public sector cooperation. Supported in part by commercial advertising, the magazine is the only such publication in Canada.

Its useful, well-written and easy-to-understand news coverage clearly fills a void. For the first time, the industry has a channel to highlight specific information on domestic products and packages and the retail travel trade has a much needed source with which they can sell Canada.

During 1998, CTC initiated an ambitious corporate communication strategy to raise awareness of tourism as an economic and employment generator in Canada.

It earned unprecedented attention throughout Canada, the U.S. and overseas. The largest U.S. and Canadian daily newspapers, radio and television networks have responded enthusiastically to the newfound availability of newsworthy stories.

By the end of 1998, the CTC was better known. The media, the public-at-large and the industry itself have an improved understanding of the scope, scale and contribution of tourism in Canada.



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Deputy Minister, Economic

Development and Tourism,

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Convention and Visitors Association

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* *Member of the Executive Committee.*
Carries out the business of the
Commission between meetings of
the full board.

** *Member of the Performance*
Measurement Committee. Oversees
the CTC's finances and establishes
performance measures for programs
and expenditures.

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April 1, 1998 to March 31, 1999

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John Hayter, *Vickers and Benson*

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Peter Kingsmill, *The Redberry Pelican Project*

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