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Tourism Canada Tourisme Canada

TECHNOLOGY IN TOURISM

WORKSHOP

PROCEEDINGS

TOURISM CANADA

Canada Directorate

Canada

Industry Canada Industrie Canada

TECHNOLOGY IN TOURISM

WORKSHOP

PROCEEDINGS

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TECHNOLOGY IN TOURISM WORKSHOP

PROCEEDINGS

1.0 INTRODUCTION

In June 1994, the first national meeting of the Canadian tourism and technology communities took place. The Technology in Tourism Workshop was held to develop a consensus within the Canadian tourism industry on national priorities for technology development and diffusion and to identify players who would be prepared to contribute to joint projects.

Based on issues and objectives identified in three delphi discussion groups held in the spring of 1994, the Workshop provided the first real opportunity for the community to work together to reach consensus on the critical action items for the industry. The resulting actions and deliberations of the Workshop will serve to guide industry and government actions in the future.

It is important to note that the Canadian tourism industry had not previously successfully come together to discuss these issues or to develop a plan for technology adoption and diffusion. The role of the federal government in this initiative is that of facilitator; to leverage opportunities in the market place and to play a supporting role, rather than a leading role.

1.1 BACKGROUND

The fast-paced environment of technological advancement is demanding change in many of Canada's industry sectors. Tourism is one of them. The Canadian tourism industry can achieve superior competitive advantage through the application of advanced technologies, to reach customers and increase sales, to eliminate unnecessary duplication in technology development and to increase productivity.

In Canada, the over-riding focus is on the means by which tourism operators can most effectively reach international and domestic customers. Currently, Canadian suppliers of tourism products and services make limited use of information technology and lack the awareness and appreciation of the importance of changing information technology and travel distribution networks. Another critical factor is that much of Canada's tourism product is supplied by small businesses, who do not have the resources to invest heavily in computer systems. However, individual operators need to understand the value of technology, and the resulting gains in productivity and competitive advantage.

1.2 DELPHI DISCUSSION GROUPS

To help achieve the objectives of Tourism Canada, the firm of Ernst & Young Management Consultants was asked to facilitate a series of regional delphi discussion groups bringing together key leaders in the tourism and information technology industries. The objective of the discussion groups was to identify the preliminary priorities and issues for technology development and diffusion within the tourism industry.

Discussion groups were conducted in Vancouver, Halifax and Toronto in the spring of 1994 to identify preliminary issues and objectives for the Workshop agenda and to identify the key participants for the Workshop.

A secondary objective of the delphi discussion groups was to garner support for the objective of a national strategy for the industry. As in many other industries, regional differences and provincial objectives have precluded the sharing of information or joining of effort in the tourism industry. While various associations and organizations currently exist, representing specific industry sectors such as hotels and restaurants, even the Tourism Industry Association of Canada (TIAC) does not have an active technology committee.

Details of the Delphi Discussion Groups findings were noted in a separate report to Tourism Canada. Participants of the discussion groups were invited to attend the June Workshop in addition to other key individuals from the industry.

1.3 THE ROLE OF THE FEDERAL GOVERNMENT

The mandate of Industry Canada is to promote international competitiveness and excellence in Canadian industry, science and technology. Access to and development of a world class technology base is central to this objective. Industry Canada must determine the appropriate approach to technology diffusion and development, particularly in light of limited financial resources.

Industry Canada's strategy is to lead and integrate work that creates competitive advantage for Canadian firms. The Action Plan For National Prosperity stresses the need for partnership and industrial responsibility. Its overarching theme, innovation, is concerned with investment in people, infrastructure and horizontal policy frameworks. The plan contains recommendations for technology diffusion and development, a national high speed communications network and improving government services to reduce overlap and duplication. Tourism Canada's mandate is to improve the competitiveness of the Canadian tourism industry through improved technology development and diffusion in partnership with industry.

On May 31, 1993, the federal government announced funding for specific initiatives to increase the competitiveness of the Canadian tourism industry, over a four year period. Activities undertaken to improve the development and diffusion of technology within the Canadian tourism industry and to identify opportunities to apply new technology are collectively referred to as the Tourism Technology Development and Diffusion Program. The second area of emphasis is the identification of opportunities to improve the delivery of sectoral data assets and analysis through technology strategies to design customized destination and enterprise-specific intelligence products and promote their use by small and medium-sized businesses. Projects in this area are referred to as the Strategic Information/Intelligence Program.

In the first year of the Tourism Technology Development and Diffusion Program, efforts were concentrated on building the tourism technology knowledge base and co-hosting a conference with the Pacific Asia Travel Association and Pacific

Telecommunications Council entitled *Information Technology for Travel and Tourism Marketing*, held in February, 1994 in Vancouver, B.C. This conference served to sensitize the Canadian tourism industry to technology applications in the tourism industry worldwide.

1.4 THE TECHNOLOGY IN TOURISM WORKSHOP

The national Technology in Tourism Workshop was held in Sainte Adèle Québec on June 14-16, 1994. Mr. Bill Hutchison, Senior Partner with Ernst & Young Management Consultants and facilitator of the delphi discussion groups led this consultation process of key tourism and high technology industries leaders.

The deliberations from the discussion groups formed the basis for a two-day Workshop involving approximately 60 selected industry leaders from the Canadian tourism and information technology industries. The objective of the Workshop is to develop a blueprint for the development of an industry wide strategy to improve the effective adoption of leading edge technologies in the industry, including identifying key initiatives and work groups to move the program forward.

A second objective was to identify players with the capabilities to create a strategy and to take responsibility for future actions on behalf of the community. These participants would be prepared to contribute to joint projects. The intention is to have industry take the lead on a number of issues.

The Technology in Tourism Workshop also served as the forum for a discussion on the function and composition of a national steering committee called the National Advisory Board on Tourism Technology, announced by the Honourable John Manley, the Minister of Industry on July 6, 1994, which would oversee the implementation of key initiatives. The press release in found in Appendix A.

The deliberations of the Technology in Tourism Work are the subject of this report.

The importance of the Workshop was emphasized by the attendance and welcoming speech of the Honourable Judd Buchanan, Special Advisor on Tourism to the Prime Minister. Mr. Buchanan's speaking points are included as Appendix C.

The Workshop individuals from varied sectors of both industries, and provincial and federal governments. An international perspective was also added to the Workshop through the participation of representatives from Worldspan, Atlanta, Georgia and Infocentre Travel Systems, Hampshire, England. A list of the Workshop participants is included as Appendix B.

The Workshop Chairman set the agenda for the Workshop by presenting an overview of the key issues identified to date and an outline of the Workshop's agenda. The overview material is included as Appendix D.

The Workshop was held at Le Chantecler Resort and Convention Centre in Sainte Adèle, Québec. Discounts for travel were kindly provided by Air Canada, Canadian Airlines International, VIA Rail, Tilden Car Rental, Avis Car Rental and Thrifty Car Rental.

2.0 PANEL DISCUSSION

This was the opening panel to set the stage for the rest of the of Workshop. Panel members were asked to discuss their views on the objectives and over-riding issues to increase the use of information technology in the tourism industry, and the method to proceed to create initiatives to achieve the priorities.

Panel Members:

Judith Cabrita
Managing Director
Tourism Industry Association of Nova Scotia

Hugh Campbell
Chairman Aviation Committee
Alliance of Canadian Travel Associations

Geno Dirrado
Director, Sales and Marketing
Hertz Canada Ltd.

Harry French
President
Authentic Tour International

Brian Harding
President and CEO
The Gemini Group

JUDITH CABRITA

The main issue identified by the discussion groups was ***communication****, and how do we reach our industry. A second key issue is the requirement for a strategy or "road map", integrating marketing, training and technology. What we are doing now has to fit into the overall picture. We have to take some action. We have to get over our fears that today's technology is not enough and something else will come along. Technology becomes outdated quickly. We have to become involved in technology more quickly to keep pace with the changing environment.*

Partnerships *are another key issue. We have to get industry and government working together. We have to look at air access, breaking down the "Berlin Walls"; we have to think globally and realize that we must fit into the big picture. In Nova Scotia we have to reach out to small businesses which are currently not interested in technology. But how do we get diverse business working together? Partnerships and linkages are required between the key players to tear down some of the existing barriers, and to ensure we're all headed in the same direction.*

A further issue is ***cost****. We have to look at technology as an investment, not as a cost. But how do we set ourselves up to withstand the costs? For example, the Pan Atlantic Tourism Technology Network will cost $300,000 to put 78 people together on a network.*
Other issues include ***compatibility*** *of languages, opportunities, learning networks, and the ability to get on-line. Better statistical information can be available through access to databases and networks. We have to get away from marketing; consider the value of using technology as opposed to marketing dollars.*

Another area is ***standards and ethics****. There are opportunities such as learning networks. The ability of individuals to really get on-line with statistics to tell them where people are will allow operators to buy into the whole picture.*

Action *is the main issue; to get on-line and get over our fears.*

HARRY FRENCH

Technology is changing the way we all do business. However, we have to be careful not to just get caught up with the hype of productivity increases. We need to evaluate how technology applies to us. Standards and the sharing of databases are things we talk about on a daily basis. What we have to do is move to a fundamental cultural shift in how operators do business.

From the industry's perspective, they see the introduction of technology as a threat to how they do business. They see their businesses as personalized. Technology moves them away from that feeling of personalized service. Technology is seen as a threat to the personalized approach. We need more than an attitude shift. We need a new attitude.

The tourism industry is a fragmented, ineffective group and technology can be the tool, the common ground to tie this industry together, to seamlessly connect the large and small companies. The tourism sector, cultural sector and heritage sector all need to be tied together.

How do we involve the smaller regional/sectoral sections in this process? How do we involve the smaller operators? Some sectors, such as culture and heritage have not traditionally been included. We must do it with technology, but looking beyond the tourism sector is difficult.

Another key issue is ***leadership****. The discussion groups all identified a lack of leadership as a fundamental issue. I believe that the issue is more of the lack of consistent leadership, and we need consistency, otherwise we will see the demise of good ideas. We need stability and a longer term approach. Leadership is important to carry forward the vision of technology in tourism and we need consistency in that leadership.*

*Another issue is the need to guard against losing the "****customer first****" perspective. We should focus on that as a key challenge. Don't do what is convenient for us. Instead of what is good for the customer, for example, as has been done with grading*

programs. Initiatives which make our objectives look more interesting, or easier are not the issue. It has to ultimately do with what the client is looking for.

BRIAN HARDING

From the perspective of a technology provider, the concerns appear to be varied and diverse. Generally, people think technology has a significant part to play in the overall solution. There is some good news and some bad news. The good news is that satisfactory technology exists today to meet most of the needs of the industry. What is required is integration of those technologies into an appropriate solution. What is required is a "best fit" to leading edge technologies. The bad news is, as a technology provider, I don't know where to start.

We talk about a road map. How do you develop a road map until you know where you're going? We need to understand:

- *what are the industry's objectives;*
- *what are the requirements; what awareness exists; and*
- *do we develop a national program, a provincial program or a regional program?*

Awareness of developments around the world is also required. We need to articulate what the destination is. Technology will develop the road map which best fits when we know what real issues are defined and articulated. It is an excellent opportunity, and we need to focus on what the real issues are.

Lots of technology is available; the challenge is to integrate the existing technologies. The question is, where do we start?

The issue of a road map has been raised, but how do we define the road map if we don't know what is our destination, what are our goals, objectives?

One of the problems that faces the industry is that if a someone has a good idea, who do they tell? There is no body or organization which represents the industry.

HUGH CAMPBELL

I look at what is going on in the industry and it is very confusing. How do we tie all this together? As far as travel agency networks are concerned, 70% of business in Canada is written by travel agents. The huge deficit in travel in Canada has brought this particular initiative about. Operators cannot market their products. The tourism industry has not had its proper due. Tourism has been combined by government with other portfolios over the past and we in the travel industry, have had some concerns about this low level of priority.

The government is trying to bring people into Canada, and we, the travel agents, are sending people out of Canada. Travel operators are a great resource for getting people out of the country. However, many tourists from other countries want to come to Canada, for example, for skiing. We need better information and the infrastructure to help us reach, and market to those potential customers.

Day to day transactions, boarding pass paper jammed in machines; day to day issues are the concern of travel industry discussions. Today, we are talking about new ideas and why we are not using the information that is available now. Currently only 20% of information in system is used. Training is vital, we are not coming close to using the existing information.

The use of 1-800 numbers in the United States is concerning ACTA. They are being used for both booking and information. Travel agents have fought this issue. We (the agents) need to be involved in the development of technology. In the past, development has taken place outside the industry without input from the agents or consideration of the needs of the travel agent. Development money has been spent on systems that agents will not use. We have to be involved. If travel agencies find the technology too difficult to use, they just won't use it.

Another concern is commissioning structures. One of the major concerns is that we have moved away from booking small hotels because there is no commission. For example, most of the hotels in Alberta don't pay commission. We need to move to fee-based commission structures.

GST is another critical issue. We cannot compete with U.S. agents to bring people into Canada because of the GST. US agents don't add the GST so it is cheaper for them to do business in the south.

Canadian travel agencies need assistance in the areas of re-training and re-thinking in Canada as well as abroad. Training is key.

GENO DIRRADO

I am here today as a marketer, not a technocrat. There is an opportunity to group together on the common issue - the destination. Destinations sell first. We need a concerted effort to deal with the destination. Many initiatives are taking place in public and private sectors. We need a hook in technology to talk about issues and cost saving potential for the objective of competing against other destinations. The key issues are:

- *information distribution to make marketing decisions and provide more effective communications and distribution of information exists today in a fragmented way;*
- *re-packaging the way information is re-distributed for the various systems so that rather than have a component type product, the information can be targeted. We need a menu of packages to walk through, to be able to deal with customers more effectively;*
- *improved information distribution. Integration required; and*
- *technology should be considered an investment, not a cost. We need standardized ways of doing business and better figures for decision making.*

2.1 QUESTIONS AND COMMENTS FROM THE PLENARY SESSION

- *Don't focus on your own country, there are thousands of automated agencies all over the world that don't have adequate information. You have to find something that will "add value". There are 3,000 agencies in Canada, 100,000 agencies around the world. Canadian operators need to be connected to these automated agencies.*

- *Need to find ways to add value for marketing of small properties.*

- *To some extent all the provinces compete with each other for tourism business. However, there are areas where we can cooperate, particularly if we want to market the "Canadian" product outside of Canada. Within Canada, there are opportunities for us to cooperate with the new technologies, use of the Internet and television and opportunities to learn from shared experiences where certain regions have moved into technology faster than others. Opportunities for national repositories where information can be stored and shared. We need to side-track certain competitive issues and present a common front when we go outside Canada.*

- *Several other industries "cluster" for the industry's common good. For example, car dealers have grouped to form auto malls. Information technology companies cluster in research parks to share facilities and developments. There are good models of cooperative clustering for the tourism industry to learn from.*

- *We must look at technology two to five years in the future. Focus on operators, the technological gap, the users and decision makers. Decision makers are sometimes not educated enough and the development of technology has outstripped their ability to effectively implement it.*

- *Why do we want operators to adopt technology? We can we learn from what happened in other sectors, i.e. the telecommunications industry. There is a need for momentum and a critical mass of operators to make it work. Operators are frustrated with the process. We need to offer concrete opportunities for the tourism industry to get involved. We need to get the two industries together.*

- *Two elements are required:*

  1. *We have to understand what is available that can move the industry forward. There are products that the industry in Canada should be using, but the industry is not aware of them. What the tourism industry should be using has*

not been communicated well by the technology industry. What we get is bits and bytes. The tourism industry needs non-technical communication.

2. *The responsibility of the tourism industry is to understand what it should pay for, and that the industry must be willing pay, because government will not. We should identify ten applications in the tourism industry that are needed for data base development or to move information. Then we can deal with the hard specific issues. The technology industry does not know what the tourism industry wants.*

- *Who are our clients and what do they need?*

- *There is a need for an education process on both sides, which is currently missing. There is a lot more technology available than what we need to solve our problems. One challenge is to keep up with the needs of the community, but not to let the technology drive the process. We need to work with a vision of what is required and what the client needs.*

- *What is on today's shelves and do we need to know what is on tomorrow's shelf? The media we use to transmit information must be the media chosen by our clients. Keep that in our thinking: there are choices between different channels of communication. We need to ask:*

  - What is the call to action?
  - What do we need?
  Grass roots operators need to deliver the product.
  - What are the milestones we must meet?
  There must be a demonstrated willingness to remove some of the barriers.

- *The solutions may be national or regional. But the solutions must be industry solutions. There are ways to subsidize the costs of technology, training and information. Much of technology is not as expensive as one might believe. For example, telecommunications technologies such as voice massaging.*

2.2 SUMMARY OF THE KEY ISSUES AS PRESENTED BY THE PANEL SPEAKERS

Communications - need a road map and a strategy - be aware of the global picture	*Partnerships* - improve linkages - break down the barriers
Access - get on the network - standardization	*Cost of Technology and Training* - technology adoption - attitude shift
Technology can provide a common ground - i.e. shared-screen computer research	*Need to involve smaller communities and operators*
Leadership - lots of leaders exist - need a consistency in the leadership	*Customers First!*
Lots of Technology is available - challenge is to integrate - where do we start?	*How do we define the road map?* - need to articulate the destination
Tourism deficit - cost to small operators	*Priority of the tourism industry to the government*
Focus on exporting Canadians to other destinations needs to be changed to keep Canadians at home	*GST is a major issue for importing tourists*
Training is vital - only 20% of existing information is accessed and used	*Travel operators need to be levered to provide better information of travellers at home*
Opportunity exists to re-focus around destinations information	*Need to address benefits to travel operators to book non-commission destinations*

Need to focus on what is the vision	*Who are the clients* - What do they need
What are the milestones	*What are the gaps*
What is our position relative to our international competitors	

3.0 BREAK OUT GROUPS

3.1 FIRST BREAK OUT GROUPS

Following the panel presentation Workshop participants were divided into four groups with the objective of identifying the key issues and priorities for increasing the use of information technology in the tourism industry. A general discussion took place following the presentation of the individual group reports. Consensus was reached on the following topics as the key issues for further discussion.

1. *Marketing*
   - Awareness
   - Research
   - Product Innovation

2. *Training and Education*
   - Product Innovation

3. *Communications and Information Systems*
   - Product Innovation

4. *Partnership/Structure*

3.2 SECOND BREAK OUT GROUP FINDINGS

Workshop participants were then divided into three groups, each group focusing on one of the first three summary topics emerging from the first break out groups. All three groups were also asked to address the Partnership and Structure issue.

The objective of these break out groups was to define the key elements, a mandate and set action priorities for each summary issue. In addition, the groups

were asked to identify potential members of a subsequent work group and to identify potential members of an overall steering committee.

3.2.1 GROUP 1 - MARKETING

Group Members

Louise Beauchamp	*Cathy Johnson*
Sid Blundon	*Dave Lough*
Dale Carey	*Hugh Milchem*
Geno Dirrado	*Michelle McKenzie*
Jim Engel	*Jacques Plamondon*
Philip Haines	*Glen Steeves*
Michael Hallé (presenter)	*Claude Valade*

Mandate

Promote awareness and secure implementation of effective technology within the marketing discipline for tourism in Canada.

Process

- A Marketing Task Force to be struck with representation from the following areas:
  - tourism industry marketing people
  - technology industry marketing people
  - public and private sector in both categories
  - full regional representation
- Elect a Chairperson
- Drafting support required
- Draft a strategic plan by September 30, 1994

- Review of strategic plan by steering committee by October 30, 1994
- Action plan to be in implementation within twelve months.

Marketing: Definition

- Promotion of the product
- Focus on the 'customer needs' perspective
- Awareness of what is to be sold
- Product development
- Innovation
- Distribution of product
- Customer service
- Positioning
- Research
- Pricing
- Commissions
- Target Markets
- Life cycle management
- Regulatory bodies
- Packaging of products
- Information products
- Funding - marketing partnerships

Awareness: Definition

External	*Internal*	*Influencers*
Promoting Canada as a destination: - products - activities - types of experience	Awareness of available technologies that can be used in the industry for marketing	Awareness of importance of tourism to influencers (government, public)

Research: Definition

Customer Market Research	*Intelligence*
- testing of messages - surveying potential customers - demographics	- trend analysis - vision - emerging technologies - emerging management processes - product innovation

Econometrics	*Communications and Sharing*
- return on investment	
Feedback from Customers	*Product Research*
- performance metrics - after usage evaluation	- what do we have in Canada? - how does it rate?

Working Group Composition

The following individuals volunteered for participation in the Marketing Working Group:

Geno Dirrado
Louise Beauchamp
Jacques Plamondon
Cathy Johnston
Jim Engel
Hugh Milchem
Michael Hallé
A representative from industry

3.2.2 GROUP 2 - COMMUNICATIONS

Group Members

Jim Betts
Neil Brotheridge
Chicke Fitzgerald (Presenter)
Maureen Flemming
Harry French
Pierre Gautreau
Bill Kenny
Chantal Langelier
Ron MacNeill
Don Mills
Janice Shewchuk
Deborah Souccar
Jean-Pierre Thibault

Fragmentation Issue

Currently the following types of systems exist:
- reservation systems
- information systems
- regional databases

There is a need for inter-connectivity of information and reservation systems. Reservation systems are only being used as a source of information in a small way.

Identification of all systems in existence is required.

Information/Communications

Information and communications are required for the following:
- Customers
  - to package information and improve response time
  - look to customers to determine priority distribution systems
- Technology Providers
- Marketing

Issues

- Managing information
  - being able to pull off on particular customer segments
- Sharing information
- Communicating information
  - common platforms are needed for regional systems

Awareness

- Today we use brochures, ads, publications to reach our customers.

- Technology however, can reduce the cost and reach more people. For example, the use of destination-based systems effectively reaches a larger base.

- Technology is a "facilitator", but improvements are required. Technology currently in use is too text-based, i.e. GDS systems have reduced the description of a hotel to a series of code numbers and price. We need destination-based systems rather than component-oriented systems. We need to be aware of what was used before, what is being used now and what will be used in the future. We can then decide where the development should be.

Mandate

To provide a world-wide solution for data communications and product availability:

1. Listen to the customer using:
   - marketing
   - training

2. Investigate available solutions

3. Review standards, requirements, and make recommendations

4. Security
   - some sectors of the industry will never want to share information, therefore systems have to be designed to reflect flexibility to provide access, and security.

Composition of Working Group

The group should be project oriented. The group should include the following representatives, and should have cross-country representation and be industry-led:

- telecommunications providers
- systems integrators
- provincial governments
- agency associations

The following members of the break out group volunteered to form the core of the Communications Working Group:

Chicke Fitzgerald
Harry French
Jim Betts
Deborah Souccar

The group also raised the idea of acquiring sponsorship from a software or telecommunications company to assist with communications of the working groups and steering committee.

Steering Committee

- to include 2-3 representatives from each Working Group
- should have even geographical representation
- should include "stakeholders" representation
- service suppliers
- note: the Steering Committee should not be too large.

3.2.3 GROUP 3 - TRAINING AND EDUCATION

Group Members

Bernard Bourget
Judith Cabrita
Hugh Campbell
Jackie Coulter (Presenter)
Alan Crockford
Graham McOuat
Kellie Mulligan
Diane Pintal
George Reeleder
Gordon Stewart

Key Issues

1. Upgrade current skill base.
2. Increase technical awareness.
3. Reduce fear and apprehension of technology.
4. Understand how to access and use the available data.
5. Culture Change Issue.

Architecture

- Appropriate infrastructure required to access information
- Information is available on outbound and inbound products
- Strategy required to market domestically:
  - definition of information
  - distribution of information
  - identify common platforms
  - create linkages between systems.

Marketing

Key issues are:

- Product Positioning
- Awareness
- Product Innovation
- Training and education
- Communications and & information systems
- Partnerships/structure

Technology in Marketing Issues

- Product awareness
- Product innovation
- Market research

- Customer service

Cultural Issues

- Education
- Training
- Skills development
- Technology awareness opportunities

System Design/Opportunities Issues

- Database strategy
- Information access strategy
- Communications design
- Technology standards

Organization Issues

- Partnerships/structure
- Economic issues
- Vision/mission

Marketing/Business (Technology Focus)

- Cultural issues
- Systems Design/Opportunities Issues
- Organization/Structure Issues

Working Group Composition

The group did not designate specific individuals to participate on the Training and Education Working Group, but did agree that the group would likely contain most members of the break out group.

4.0 CONCLUSION

4.1 STEERING COMMITTEE

The Workshop concluded with the creation of a core steering committee and three working groups. The steering committee was mandated to nominate a chairperson to oversee the activities of the working groups and to report back to the Workshop community on its activities. Tourism Canada will document the results and provide feedback to Workshop participants.

Subsequent to the Workshop the steering committee renamed itself as the National Advisory Board for Technology on Tourism Technology and named Brian Harding as Chairperson of the Board. The Board members are listed below.

National Advisory Board on Tourism Technology

Chairperson

Mr. Brian Harding
President and CEO
The Gemini Group
Automated Distribution Systems Inc.

Marketing Task Force

Mr. Hugh Milchem (Chair)
Business Manager
BC Tel Advanced Communications

Ms. Catherine Johnston
Executive Director
Advanced CARD Technology Association of Canada

Training and Education Task Force

Ms. Jackie Coulter (Chair)
General Manager
Northern Frontier Visitors Association

Mr. Hugh Campbell
Chairman
ACTA Aviation Committee
Alliance of Canadian Travel Associations

Ms. Judith Cabrita
Managing Director
Tourism Industry Association of Nova Scotia

Communications and Information Systems Task Force

Mr. Harry French (Chair)
President
Authentic Tour International

Mr. James Betts
Director, Sales
Bell Advanced Communications

Ms. Chicke Fitzgerald
Director of Transportation Solutions
Worldspan

Other Members

Mr. Michael Hallé
Manager, Development and Communications
Centre for Tourism Studies
Ryerson Polytechnic University
School of Hospitality and Tourism Management

Secretariat

Mrs. Janice Shewchuk
Manager, Technology
Tourism Canada

4.2 FINAL SUMMARY

The principal objective of the focus groups and the Workshop was to develop a consensus or an agenda for action and to hopefully create a representative group to maintain the momentum and create subsequent initiatives for enhancing the use of information technology in the tourism industry. All of the objectives were achieved and the enthusiasm of the participants should lead to some impressive progress.

See Appendix E for a full listing of Task Force Members.

APPENDICES

News Release

INDUSTRY CANADA AND PARTNERS PROMOTING TECHNOLOGY IN TOURISM

OTTAWA, July 6, 1994 — The tourism industry and Tourism Canada are collaborating to develop an action plan to improve the competitiveness of the Canadian tourism industry through better use of technology.

Industry Minister John Manley announced today that as a follow-up to the national Technology in Tourism Workshop held in mid-June in Sainte Adèle, Quebec, three task forces have been formed to establish action plans in marketing; training and education; and communications and information systems.

"The ability of firms to use advanced information and communications technologies, products and services is as much a key to competitiveness in tourism as any other sector," said Mr. Manley. "The task forces will bring together tourism interests and technology leaders to share expertise, and agree on an action plan to address technological challenges and opportunities."

The task forces will be guided by a 15-member Steering Committee chaired by Mr. Brian C. Harding, current President and Chief Executive Officer of The Gemini Group. Associated for more than 20 years with advanced computing and communications technologies, Mr. Harding has spent the last seven years with The Gemini Group specializing in the development and deployment of travel related products and technology.

Parties from the Canadian tourism and technologies industries who are interested in participating in this initiative are invited to contact the respective task force chairpersons:

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BACKGROUNDER
TECHNOLOGY IN TOURISM WORKSHOP

Tourism Canada hosted a national Technology in Tourism Workshop from June 14 to 16, 1994 at Le Chantecler Resort and Conference Centre in Sainte Adèle, Québec. The workshop was designed to develop a consensus and strategic direction for the adoption and development of technology within the Canadian tourism industry over the next three years.

Mr. Judd Buchanan, recently appointed Special Advisor to the Prime Minister on Tourism attended the workshop. Mr. Buchanan, making opening remarks, stressed the key to competitiveness will be the ability of firms to develop, acquire and adapt advanced information and communications technologies, products and services. "Canadian tourism operators can work better and smarter, to improve product and service quality, and to differentiate themselves from their competitors," Mr. Buchanan said.

Mr. Bill Hutchison, Senior Partner at Ernst & Young Management Consultants and Chairman of the Board of the Canadian Network for the Advancement of Industry, Research and Education (CANARIE), Inc. acted as workshop leader. In the past, Ernst & Young have undertaken such consensus building workshops to initiate technology projects such as Vision 2,000 and The CANARIE Project.

The workshop brought together for the first time participants from the tourism and technologies industries, universities, sector associations and provincial/territorial governments and other federal departments. Addressing the many factors which will affect continued development of the tourism sector, participants moved quickly to establish three Task Forces to develop detailed action plans and establish technology priorities.

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APPENDIX C

Industry Canada

SPEAKING NOTES

FOR JUDD BUCHANAN
PRIME MINISTER'S SPECIAL ADVISOR ON TOURISM

TO
THE TECHNOLOGY IN TOURISM WORKSHOP
DELEGATES
LE CHANTECLER RESORT AND CONFERENCE CENTRE
SAINTE ADÈLE, QUÉBEC
TUESDAY, JUNE 14, 1994

Check Against Delivery

Ladies and Gentlemen:

On behalf of John Manley, the Minister of Industry, and Tourism Canada, I would like to welcome all of you to Sainte Adèle and the Technology in Tourism Workshop.

It gives me great pleasure to have the opportunity to speak to you - key people who are so important to the tourism sector in Canada. This is one of the more rewarding aspects of my position as the Prime Minister's Special Advisor on Tourism.

I am told that this is the first meeting of its kind for the tourism industry in Canada. In fact, this is the first attempt to bring together leaders within the tourism and information technology industries to make the necessary linkages for a mutually advantageous relationship.

I am especially glad to have the opportunity to meet with you tonight. Since the tourism sector is one of my key priorities, I have championed tourism's interests in Caucus. Therefore, it is especially rewarding to be part of the launching of this effort to improve the competitiveness of the Canadian tourism industry.

This meeting boasts fifty delegates from all parts of the country. Hoteliers, the transportation sector, reservation systems, telephone companies, software developers, retail travel agents, the academic community, tour operators, national, regional and sectoral tourism associations and our provincial and federal colleagues, are all in attendance tonight.

My congratulations to all of you who have chosen to become involved!

This is certainly an indication of the broad and transforming effects which technology is causing throughout the Canadian economy. All predictions for the new knowledge-based economy are that the enabling effects of technology will be felt in all industry sectors. Sectors such as tourism and technology are key to creating jobs through innovation.

Tourism Canada has organized this Workshop to define industry-wide priorities for technology development and the focus for action over the next few years.

I am confident that your meetings over the next two days will give direction for what actions the Canadian tourism industry should undertake. I look forward to learning what recommendations you will make.

Technology promises to significantly improve marketing, increase sales and enhance productivity for tourism firms. In deciding how best to promote technology for this industry, we have to consider if we should focus on improved use of computer reservation systems to market internationally. Should we try to improve awareness by operators of the need to adopt technology? Perhaps other issues are of even more vital importance. This Workshop will develop the consensus and strategic direction for the Canadian tourism industry.

Canada must match the efforts of our major competitors. We need to accelerate technology diffusion. We have to identify opportunities to create jobs and achieve economic growth. If not, the opportunity will be seized by the tourism industry in other countries.

This all season resort, a fine example of Canada's tourism product, is an ideal setting for us to reach an agreement on our mutual preferences.

The Government of Canada recognizes the importance of technology to the economy and has undertaken a number of initiatives which should improve accessibility to Canada and its attractiveness as an international travel destination.

For example:

1) In the January 1994 Speech from the Throne and in the February federal budget, the government reinforced its commitment to a strong communications capability by announcing its intention to implement a Canadian strategy for an information highway. The information highway will be a "network of networks" incorporating both telephone and cable television traffic.

The information highway initiative is essential for Canada's success in a new global economy in which value, jobs and wealth are based on the creation, movement and

application of information. It will accelerate the pace at which we exchange ideas and will revolutionize our way of doing business in the travel industry.

2) Tourism Canada co-hosted an international conference on Information Technology for Travel and Tourism Marketing, in February 1994. This event served to sensitize the Canadian tourism industry to tourism technology applications worldwide.

3) Recently, provincial governments and tourism associations from the four Atlantic provinces have decided to become the first tourism network to explore the use of the INTERNET to exchange information, intelligence and to work as partners.

4) The federal government has launched the SchoolNet project, a cooperative venture with provinces, universities, colleges and industry. The objective of the project is to foster improved learning performance at the elementary and secondary school level by providing subsidized links to the INTERNET, and to produce a school graduate population with a strong command of information and telecommunications technology. These distance education services can also be used by the tourism industry, for human resource development.

5) As of April 1994, five Canada Business Service Centres were opened by Industry Canada, in cooperation with provincial governments and the private sector, and five more are planned. These will provide single-window access for information, assistance and referrals on all government programs and services for business, including tourism operators.

6) In March 1994, Industry Canada and the Ottawa Carleton Research Institute Network Inc. (OCRInet) signed a three year agreement to develop and test information highway applications at the Communications Research Centre's BADLAB. That intriguing name stands for CRC's new Broadband Applications and Demonstration Laboratory. Technology development underlying this application is supported by the Canadian Network for the Advancement of Research, Industry and Education or CANARIE.

CANARIE is a non-profit corporation of eighty members and can be seen as the prototype of public and private sector collaboration that is required to fast track the information superhighway. Mr. Bill Hutchison, your Workshop leader for the next two days, is Chairman of the Board of CANARIE, Inc. Mr. Hutchison has played an integral role in the development of a number of information technology initiatives and is uniquely suited to lead Tourism Canada's Technology in Tourism Workshop.

The Government of Canada will continue to support such initiatives. Mr. Manley, his Secretary of State, Jon Gerrard and Dennis Mills are all wired; that is, they communicate on-line!

All humour aside, I am quite serious when I say that this government is committed to the ongoing improvement of the use of technology within the tourism industry. In fact, the Prime Minister has appointed myself as advisor on tourism. I will be reporting to the Prime Minister and will recommend appropriate actions to be taken by the federal government and the tourism industry to increase Canadian tourism revenues.

As some of you might know, I am Chairman of the Silver Star Mountain Resort in British Columbia. As the Prime Minister's Special Advisor, my objectives will be to enhance Canada's tourism products and strengthen marketing efforts to encourage more new jobs, additional small business opportunities and to reduce the travel deficit. This will require working with a number of groups in the private and public sectors over the next six months. I encourage you to share your views while I am with you and when the Workshop ends.

The new technology era will set in motion a number of positive outcomes. Competing in global markets, Canadian tourism operators can work better and smarter, to improve product and service quality, and to differentiate themselves from their competitors. The key to competitiveness will be the ability of firms to develop, acquire and adapt advanced information and communications technologies, products and services.

My challenge to you is to articulate the vision you have for the tourism industry and outline a thoughtful strategy to improve the industry's use of technology.

Everyone in this room plays an important role in showing the world how much Canada has to offer. I encourage you to share your ideas and discuss them freely during the next few days.

In closing, I would like to thank our colleagues in Tourism Canada for their hospitality in offering me this opportunity to speak to you.

My best wishes for a successful Workshop. Remember to pass the word around, travel in Canada!

Thank you.

APPENDIX D

OVERVIEW PRESENTATION by MR. BILL HUTCHISON (CHAIRMAN)

BACKGROUND

- May 1993 - the federal government confirms their commitment to increase the competitiveness of the Canadian tourism industry and announce funding over a four year period.
- *The Tourism Technology Development and Diffusion Program* is established to fund specific projects to improve adoption of leading edge technologies by Canadian tourism operators.
- February 1994 - the PATA Conference - Tourism Canada announces a Delphi Workshop to be held in June 1994. The objective of the Workshop is to develop consensus on priorities and opportunities for tourism technology development.
- Delphi discussion groups are held in Halifax, Vancouver and Toronto to determine the issues and topics for the Workshop.
- 60 leaders from the tourism and IT industries, and provincial and federal governments gather at Sainte Adèle, Québec to define a strategy for improved adoption of leading edge technologies in the tourism industry.

OBJECTIVES OF THE WORKSHOP

- To achieve consensus on identification of key priorities and issues for technology development and diffusion in the tourism industry.
- To develop a framework for an industry-wide strategy for tourism technology development.
- To identify ongoing initiatives and work groups to realize the strategy.
- To create a national advisory committee with members from both the tourism and technology communities to oversee the realization of the Workshop's objectives.

APPENDIX E

August 1994

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