



CANADIAN
TOURISM COMMISSION
COMMISSION CANADIENNE
DU TOURISME

Just how is Canada dealing with winter?



Château Montebello is less than an hour from the National Capital Region.

As Jean-Guy Pagé puts it, "We must get people excited at the idea of coming to Canada during the winter season, but I have to tell you, selling winter in Canada is not an easy thing!"

He goes on, "Snow, cold, ice, wind, you name it; these are the natural assets of winter and instead of trying to cover them up, I put more emphasis on them." Pagé is Chair of the Winter Sub-Committee,

and a member of the Industry Product Development Committee, of the Canadian Tourism Commission. He is a snowmobile tour operator in Québec.

The tourism vision statement developed for Canada by the industry, under the auspices of the Board of the CTC, states: "Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities." That is an ambitious vision, and one that CTC board member Bob DeMone was instrumental in developing. He says, "Over the last several years, certainly winter business in Canada has increased, as has the effort made within the industry to grow winter tourism as a product." However, he acknowledges that it is a tough issue,

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Tourism spending slows

According to the most recent release by Statistics Canada of the National Tourism Indicators (NTI), after being adjusted for seasonality and inflation (including fuel prices), the real growth in tourism in Canada was relatively weak, increasing at an annualized rate of only 1.7 per cent in the second quarter of 2000 from the previous quarter.

Despite the weaker seasonally adjusted numbers, the non-season-

ally adjusted numbers remain strong. Tourism expenditures in Canada injected almost \$13 billion into the Canadian economy in the second quarter of 2000, up 7.4 per cent or \$895 million from the same period in 1999. According to Statistics Canada, this increase is largely attributable to soaring fuel prices and higher numbers of trips from Europe and Asia-Pacific.

FOREIGN SPENDING UP

Foreign tourism spending during the second quarter of 2000 registered a strong increase of 8.4 per cent to 4.3 billion from the same period in 1999. This increase is due to a 10.5 per cent increase (year-over-year) in the number of travellers from countries other than the U.S. According to Statistics Canada, these travellers tend to stay longer and spend more than those from the U.S.

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COMMUNIQUE

CANADA'S TOURISM MONTHLY
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BILL C-5 RECEIVES ROYAL ASSENT

Bill C-5, an Act to establish the Canadian Tourism Commission passed third reading in the Senate and received Royal Assent on October 20, 2000. All that remains is to proclaim a date on which the law will come into force. It is projected at press time that the date will be January 2, 2001.

Communiqué will keep its readers posted on any developments and will provide some insight into the impacts of the legislation on the Canadian Tourism Commission and its partners.

Raising the bar to remain competitive

At some point every tourism business assesses its own product in the context of its competition, and the subject of industry standards comes into the discussion: "Are we up to par with the competition?" or, perhaps more realistically, "Is our competition getting away with a sub-standard product that is downgrading the reputation of our product?"

In a competitive industry, the issue of standards is a contentious one. Every business would like to think of itself as "setting the standard", not simply meeting or following the standard. When developing industry sectors address the issue of standards, it is always (of course) the sector leaders who dominate the discussion, especially at the boardroom table of industry associations. Associations themselves, when they begin to develop standards, strive to be recognized as having the highest, the best, and the most stringent, of standards.

This is excellent. The industry as a whole grows stronger every time we choose to raise the bar. We see an example of just that in this issue: the Health Tourism Product Club and Spa Canada are each a consortium of spa operators that is raising the bar. Each has its own particular constituents, but all are colleagues in the spa sector of the tourism industry, and their combined and several efforts are making Canada a leading spa destination.

Of course, some outsiders (and maybe some insiders) may be confused by having more than one organization seeking to develop national standards. They forget that Canada is not only a leading world destination, but that it is also the world's second largest country geographically, with a multitude of cultural and communication challenges. When the time is right, there will be the appropriate blending of objectives toward a common goal, and the whole industry will move another notch higher on the scale of global competitiveness.

The developing sectors are all engaged in raising the bar through seeking to establish quality or performance standards. In most cases where there are similar products that are geographically diverse (whale watching, for example), this engagement with standards is locally or regionally driven at the outset. This is healthy, and appropriate. The only time that clouds appear on this otherwise bright horizon is when organizations forget to serve the industry they represent and begin to serve their own ambitions.

PGK

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

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Tina Cancilla
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Good will yields mutual rewards

It is far from infrequent that the people who work at the Canadian Tourism Commission receive letters, e-mails, and telephone messages of thanks and support from people in various sectors of the industry whom they have helped. This is good, because helping the industry achieve its goals is what it's all about, and it's nice to be appreciated.

But it gets even better: often enough, one good turn begets another, and the resources of the CTC, and the industry, become richer. We decided to publish the following letter to CTC staffer Donna Benvenuto as exemplary of the mutual sharing of resources that works best for all of us:

Dear Ms. Owens:

I would like to express my gratitude for your assistance in providing me with invaluable information while I was performing Attractions Ontario's first association profile research report. The last time we spoke, you offered constructive insight in developing and administering the questionnaire for this report. Also, you had forwarded indispensable statistical information obtained from the CTC publication, *Canada's Tourist Attractions: A Statistical Snapshot 1995-96*. Now that it has been completed, I am forwarding you the final report as I recall that you were interested in receiving a copy.

Once again, thank you.

Sincerely,
Adrian Benvenuto
Director of Membership Services
Attractions Ontario
1-416-868-4386

Mr. Benvenuto's profile of Attraction's Ontario is now a shared resource, and the good will is shared by all.

– ERRATUM –

Please note:

An incorrect website address for the Maritime Museum of the Atlantic in Nova Scotia was provided to us for publication in the September issue. The correct address is: maritime.museum.gov.ns.ca

ON THE WEB

Communiqué is also available at www.canadatourism.com

Communiqué est disponible en français.

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JUST HOW IS CANADA DEALING...

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and he doesn't expect that huge strides will be made any time soon.

The Winter sub-committee has surfaced a number of recommendations; many of them are just what one would expect from any sector: an integrated research strategy, enhanced communications about product, and the integration of product development with marketing. Some initiatives are in full swing (for example, the "Win with Winter in Canada" package tour contest announced in last month's *Communique*).

NAILING THE MARKET WITH A RIFLE, NOT A SHOTGUN

As DeMone points out, Canada does not have to shotgun-sell winter to a

huge market in order to be successful: Canada needs to find out who it is in the international marketplace who seeks a winter vacation, carefully target market to them, and ensure that we can deliver. "It doesn't take too many of them to fill us to capacity; the challenge is fine-tuning the rifle shot at the correct market."

Some of the challenges we face in developing and selling our winter product seem insurmountable: many operators established themselves as seasonal (summer) products a long time ago, and are content to take the winter season off. They see little financial return on late-shoulder or winter business in the short run. Attractions, too, seem to be locked into a pattern of closing down over winter. As a result, there is the danger that when we do, in fact, begin

selling winter, customers find their vacation options very limited. Even ski resort areas have been known in the past to close down services according to seasonal booking trends, with the result that off-peak visitors receive a downgraded experience.

WINTER ENTHUSIASTS ARE INDEPENDENT

Kathleen McFadden and her husband Doug Garlick own the Red Rock Inn near Nipigon, Ontario. She says that they have been trying a number of things to boost their winter trade over several years, including "learn to snowmobile" packages and ice climbing packages. "By and large," she states, "winter enthusiasts are winter fanatics; they know exactly what they want to do and they are experienced, at least to a point."

The Red Rock Inn has, indeed, increased its winter trade which, like the summer trade, is about 70 per

cent U.S. market. However, winter packages are not big sellers: the snowmobilers and ice climbers come, certainly, but they pursue their chosen activities independently.

MAJOR EFFORT AND FOCUS NEEDED

Finding out exactly whom to market to, and accurately identifying the saleable products for those markets, will likely require extensive research, and will have to be part of a major winter strategy. DeMone is "somewhat pessimistic" that the necessary energy will be found to solve this issue. In the meantime, niche operators (dogsledding, snowmobiling, aurora viewing, etc.) as well as winter festivals and the ski industry, seem to be achieving some growth, in the absence of any overall winter focus for Canada.

Canadian cities light up for Christmas



The Carol Ship Parade of Lights Festival in Vancouver.

Following traditions that date back to European roots, Christmas is celebrated in many cities in Canada with festivals of lights that welcome and enthrall visitors.

For example, the waters of the harbour at Vancouver and its surrounding communities come alive with the Carol Ship Parade of Lights Festival from December 1 to 23. Each evening, the vessels participating in the parade wind their way around the various communities; corporate, private, and charter yachts get involved, and the communities organize local events around the theme of the parade. Harbour Cruises, a charter member of the Carol Ship Parade, offers dinner and dinner and dance packages to involve visitors in an "on-board" experience of the parade of lights on the water.

It's a Canadian tradition: Christmas time, as if in defiance of the shortest days of the year, brightens up the shops, residences, streets, and even the skies with lights. There is no "dark skies" angst during this

season... if you want to catch the northern lights or the stars, best to head on out of town at Christmas!

VISITORS WELCOME

The Christmas season is all about visiting. It could be families coming home, it could be old friends, and it is deeply rooted in the tradition that strangers become new friends at Christmas. Could there be a better time to invite tourists to our communities? There are even good economic reasons, for business and tourists alike: the high U.S. dollar makes shopping in Canada very attractive, and typically our accommodation sector is at its highest vacancy rate, to name just a couple of good opportunities.

Christmas in Montréal, or Halifax, or Saskatoon... the sparkle is there. Frosted with snowflakes and lights, Winnipeg sparkles during the holiday season, beginning with a Christmas count-down to a spectacle of lights as downtown Winnipeg is lit up for the holiday season. Festive crowds gather annually at the historic corner

of Portage and Main as over half a million lights glow amidst fireworks that light up the sky.

Even in Victoria, hardly the snow capital of Canada and known for its mild, somewhat rainy weather, goes all-out to have a traditional and spectacular Christmas. From December 1 to January 6, the famed Bchart Gardens are a wonderland of lights and Christmas decor. On Victoria's inner harbour, that grand old lady of hotels, the Empress, hosts a festival of trees, and the Chateau Victoria does a "12 days of Christmas" count-down between December 13 and 24.

Christmas in Canada: it's our season to share. What better could there be than to share it with visitors from all over the world... and what better opportunity!

*Harbour Cruises Ltd.
www.boatcruises.com
Winnipeg Tourism
www.tourism.winnipeg.mb.ca*

Snowmobiling in Canada

Climate and geography dictate that much of our nation undergoes an inevitable transformation into a white, frozen landscape for many months each year. Thus, along with water, timber, fisheries, minerals, and gas and oil, snow is one of Canada's great natural resources. But it is an under-rated and under-appreciated asset. Canadians have too often struggled to ignore, escape or belittle the winter season that is a defining characteristic of our nationality. In the tourism industry, where effort and investment have traditionally focused on summer, winter is almost an after thought.

However, a dedicated group of hardy Canadians are gradually bring-

ing to life our promise as "The Great White North". Operating under the national umbrella of the Canadian Council of Snowmobile Organizations (CCSO), organized snowmobilers from coast to coast have actively embraced winter, and with the assistance of tourism visionaries, are blazing a new trail to a lucrative winter tourism season based on snowmobiling and groomed trails.

\$3 BILLION IN ACTIVITY ANNUALLY

Mostly on their own, the cold weather pioneers of organized snowmobiling have built 133,000 kilometres of snowmobile trails throughout every province and territory. They have formed 914 local snowmobile clubs who each operate and maintain their own section of this vast national network. They are generally self-funded, self-regulated and non-profit. They have attracted over 500,000 family members who support their expanding user pay system by purchasing 275,000 trail passes worth over \$35 million annually. Their snowmobile trails generate well over \$3 billion in national economic activity each season, plus hundreds of millions in provincial tax revenues. Tourism businesses in some areas say that winter equals or eclipses traditional summer business.

WHO ARE THESE PROLIFIC TRAILBLAZERS?

They are ordinary Canadians from every walk of life. They are family snowmobilers from rural and urban communities all over this country – men, women, children, couples, and seniors. Their average age is 40 and 75 per cent are married. They have an average annual household income of \$56,000. They are winter fun lovers who welcome this quintessentially Canadian season

Dogsledding: an industry perspective

with heartfelt passion.

They volunteer their time, labour and skills generously to the sport they love because they want to make it the best it can be. Most of all, by forming clubs and associations at the local, regional, provincial, and federal levels, they are responsible for organizing Canadian snowmobiling, creating the impetus, depth and strength that has achieved more than any other recreational trail user group in the world.

Each year they prepare, open, maintain and groom Canada's snowmobile trails. They build the bridges, install the culverts, repair the washouts, clear the storm damage, reroute trails, and perform the hundreds of other repetitious and onerous tasks that make our snow highways a reality. They finance, maintain, operate and repair the heavy industrial equipment required to keep these trails smooth and safe. They place destination, safety and hospitality signage for the benefit of riders and businesses alike. They are trail managers, land stewards and committed environmentalists. Most of all, they are avid snowmobilers, riding an average of 1,600 kilometres per season, buying accommodation an average of 7.2 nights each winter, and purchasing food, fuel, accessories, and necessities during each snowmobiling excursion.

Nowhere has the phrase "build it and they will come" proved more accurate. Today, Canada's organized snowmobile trails also attract thousands of winter tourists from other regions and other provinces, as well as from the United States and Europe.

by Rod Taylor

As the Canadian tourism industry continues to strive to increase winter tourism in Canada, operators, receptors and wholesalers continue to find themselves searching for new non-

annually, with Alaska and the lower 48 providing the bulk of the competition to the Canadian operations.

AN ICON OF CANADA

Dogsledding is truly becoming an



Dogsledding in the Yukon.

ski related product to offer to both the domestic and international markets. Dogsledding is one such activity which has been discovered to fill this need. While commercial dogsledding companies have been operating for many years the reality is that only in the last two or three years have we seen a large increase in both the number of operators in Canada and a corresponding increase in client numbers as well.

Mushing Magazine, an Alaskan publication which publishes an annual "Dogsledding Tour Directory" has seen the number of operators advertising in the directory increase dramatically over the past three years. Interestingly however, Canadian based companies account for less than 25 per cent of the operators listed

icon of the Canadian North, as witnessed by the recent proliferation of product advertising in North America and Europe using the image of a dogteam to convey their product's message. From beer to tires, dogsledding is being used to create branding that is synonymous with the image of the Canadian winter wilderness. Adventure World, one of the largest wholesalers across Australia and New Zealand recently launched their winter product line with a brochure with the picture of a Yukon operator splashed across the entire front cover. The Adventure World office states that the response to the image has been outstanding. This despite the fact that the brochure is primarily focused on major ski resorts and winter sightseeing.

So what is it that is creating this renewed interest in dogsledding today? First, the general increase in adventure travel of all sorts is obviously helping a great deal. Dogsledding provides participants with an authentic wilderness experience which may be enjoyed by all ages and physical abilities. You do not need to be an Olympic athlete to stand on the sled runners for the first time and enjoy the experience. Our clients range from eight to seventy-two years of age and we see couples and singles, direct consumers and referrals from wholesalers, corporate groups, and families.

BROAD MARKET NICHE, BROAD PRODUCT OFFERING

In short, the market niche is broader than one might initially assume and converts to dog sledding in general are definitely gaining in number. At Uncommon Journeys Ltd. 60 per cent of our guests are women travellers who want to experience a really unique "soft" wilderness adventure but still want to be able to enjoy themselves.

In Canada, commercial dogsledding product may be divided into four broad categories. Day trips involve one hour to eight hour experiences where the guest may choose to ride in the sled basket driven by a guide, or after a short "mushing 101" lesson he or she may drive the sled themselves with a small team of four to six dogs. This type of trip is becoming more prevalent near ski areas, providing for the needs of skiers who want a day off from the slopes.

Traditionally the cost of such trips range between \$100 and \$200 CAD.

Lodge or basecamp based tours see clients mushing from an established facility, often rustic cabins etc. Here guests mush from the facilities



Snowmobiling in Western Brook Gorge.

"Sled" adventures in Newfoundland and Labrador

Here's a quick quiz: What's the only place in the world you can snowmobile to a UNESCO World Heritage Site and see the largest caribou herd in the world? Stumped? Try Newfoundland and Labrador.

That's right, and if it's a bit of a surprise to you, don't feel alone. The great snowmobiling here is still in that "best kept secret" category, but it won't be for long. Canada's easternmost province has two unique destinations. On Newfoundland's west coast sledders can visit the World Heritage wonder of Gros Morne National Park's back country, and ride to another World Heritage Site, the Viking Site at L'Anse aux

Meadows at the tip of the Great Northern Peninsula. Up in Labrador, ride the wide open spaces where the caribou roam.

For snow-starved sledders, western Newfoundland around Deer Lake is nirvana. This area gets dumped on – big time – every winter. The Marble Mountain ski resort at nearby Steady Brook averages 16 feet of nature's white blanket every year. The prevailing winter westerlies pick up extra moisture over the chilly Gulf of St. Lawrence, then deposit it as snow atop and on the eastern side of the Long Range Mountains that form the spine of western Newfoundland.

for day trips, returning each night to the comfort of a heated bedroom and prepared meals. Guests often have an opportunity to spend one night out, sleeping on the trail in order to experience the winter element "up close and personal". These trips usually range from \$250 to \$500 per person per day, and last one week in duration. It appears to be becoming more prevalent for guests travelling from overseas to often combine a one week-long dogsledding experience with a week of skiing at another destination which is enroute to the dogsledding operation.

Mobile trips usually begin with a day's mushing lesson, after which the guests embark upon a week-long camping trip travelling to a new campsite each day with their trusty dogteam. Guides endeavour to make the experience as pleasurable as possible; however, clients need to be prepared to deal with the elements in a much more personal way when travelling in this mode. The costs associated with these trips are comparable with the lodge based trips.

"EXTREME" DOGSLED ADVENTURES

Finally a few companies offer high end, serious dogsledding expeditions to remote destinations for a serious price. The numbers for these trips tend to be low but the margins remain high. Exotic trips such as travelling across the Beaufort Sea to Herschel Island, or crossing Ellesmere Island by dog team, or even travelling over the last two degrees to the Geographic North Pole are all being offered by select Canadian operators. The prices vary from \$10,000 for a nine day trip to Herschel to \$35,000 for two weeks to the Pole.

Most companies specialize in one type of trip, although a few operators may offer all four experiences. Uncommon Journeys Ltd. in the Yukon, and Northwinds Arctic Adventures in Nunavut are two such companies. By far the majority of operations are small, running with two to five employees and offering trips with a maximum of four to eight clients. There are a few operators, however, who run day trip operations with a staff of 30 or more and well over 150 dogs in their yards.

The issue of size is one of the key questions that operators grapple with as many operators feel that increasing the numbers of clients detracts from the wilderness experience. As well, many operators fear that by having too many dogs, they will be unable to provide the level of contact and care to their dogs which is of such prime importance to any dog yard, particularly one which works with the public. Many of today's operators got into commercial dogsledding as a lifestyle, and are not prepared to see the business aspect of the



Dogsledding in the Yukon.

operation take over their lives. These operators still provide an outstanding product to small numbers of clients who cherish a low client/guide ratio.

STANDARDS ARE AN ISSUE

Dogsledding is currently unregulated in Canada, although many jurisdictions have generic legislation to which adventure operators must adhere. In the Yukon, the Wilderness Tourism Association and the Yukon Government recently created legislation setting minimum standards for operators in the Territory. It is widely predicted that sometime in 2001 industry leaders in the dogsledding community will go to the table and draft specific standards for commercial dogsledding companies. Currently there are no guiding standards nor government monitored training programs for dog mushing guides.

These standards are welcomed by current operators who wish to see the criteria for dog care and client services held to as high standard as possible. Canada has an opportunity to be known as the dogsledding capitol of the world, by ensuring that these "quality control" standards are met, the industry will ensure that it's livelihood prospers.

Marketing continues to be the Achilles heel for most operators as either the lack of funds or business acumen prohibits increase in sales. Our product is world class; now we

need to get this knowledge out to the customer. Partnerships such as the one between the CTC, Tourism Yukon and the operators of the Yukon are helping to address this point. Product clubs and help with internet marketing are allowing operators access to markets which they otherwise would be unable to reach.

INTERNET BRINGS CLIENTS

Operators receive clients from all venues with many working directly with the travel trade, attending Rendez-vous and other such shows. Others derive most of their clientele from word of mouth or directly via the internet. Our company receives a full 80 per cent of our business via e-commerce. Some of the larger companies are pursuing an aggressive marketing plan visiting places such as Australia, Japan, the U.K. and western Europe to secure deals with wholesalers. As the word spreads about the quality of product now being offered, these relationships will only prosper over time. As much of the high-end dogsledding product is offered in Canada's North, direct, affordable winter airfares will remain an obstacle to increasing client numbers.

Despite the challenges, the future for winter tourism in Canada and commercial dogsledding in particular has never been brighter. With a little quality control and some marketing savvy, Canadian operators are poised to realize a healthy margin in the coming decade.

*Rod Taylor
is the owner/operator of
Uncommon Journeys Ltd.
Whitehorse, Yukon, Canada
www.uncommonyukon.com*

LABRADOR'S LONG SEASON

Labrador is another kettle of fish altogether. Here, winter comes early and stays late, so snowmobilers can ride from November to May. There are trails all over The Big Land, but it's in Western Labrador, around the mining towns of Wabush and Labrador City, that you'll find groomed trails that head way out into the wilderness toward the migration path of the caribou herd, at 600,000 strong by far the largest in the world. You can drive in through Québec and bring your own sled, or leave yours at home and rent one when you arrive.

1 800 563-6353
www.gov.nf.ca/tourism/
Newfoundland and Labrador
Snowmobile Federation
www3.nf.sympatico.ca/nlsf.marketing/

German market interested in winter niche product

For the past ten years, Canadian ski packages have been one of the cornerstones of our marketing efforts in Germany. These continued activities have resulted in a substantial increase of awareness and currently 15,000 German skiers spending their ski vacations in Canada. At the same time, we have been trying to include other winter products in our operator programs.

With the German tire producer FULDA assuming the sponsorship of the Yukon Quest, dogsledding packages became an interesting niche product. As a side product for ski packages, they were sold almost Canada-wide but have also become an interesting niche product selling on its own. It is no surprise

that small niche operators have included this type of product but recently even major players such as FTI and TUI are featuring dogsled trips as part of winter safaris. Usually, these trips commence in Whitehorse and go all the way up north to Inuvik. In order to make this rather new product also more known among travel agents, a group of 12 German Canada Specialists will be heading to Whitehorse in February 2001 in order to get a taste of Canada's North in the winter.

*Karl-Heinz Limberg
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Consortium focuses on winter

Northern Ontario knows winter and enthusiastically embraces it. And why not, because there are umpteen reasons why tourism stakeholders should. Winter is the region's longest season. Winter tourism is a growth segment as there is lots of product, and room and service capacity. Outdoor winter products dovetail perfectly with Northern Ontario's wilderness product and brand. There are great tie-ins and commonalities with hunting and fishing which is the area's largest product segment. Recent investment in snowmobile trail infrastructure has seen snowmobile tourism blossom. And of course, winter product positions Northern Ontario as a 4-seasons destination.

for Northern Ontario. The corporation is represented on the Ontario Tourism Marketing Partnership board of directors thus ensuring a strong tenable relationship between both organizations. Fednor, the federal government's regional development agency in Northern Ontario, is also a public sector contributor to **ntmc**. And the Canadian Tourism Commission is also a partnership marketing ally.

ntmc staff and the 13-member, industry-led, winter outdoor adventure product team share the responsibility for the development of **ntmc**'s annual marketing plan. From a winter perspective, **ntmc** seeks to position Northern Ontario as the 'undiscovered winter wilderness



Deerhurst Resort cross-country skiing

Northern Ontario annually generates about \$22 million in revenues from winter travel and captures 18 per cent of Ontario's winter outdoor traveller market. Ninety-two percent of Ontario winter travel is generated in-province, while 6 per cent comes from the U.S. and 2 per cent comes from off shore markets. About 128,000 overnight person trips are realized annually.

So whose responsible for winter tourism product development, marketing and research in Northern Ontario? Well, it's the Northern Ontario Tourism Marketing Corporation (**ntmc**). Following an extensive public-private sector consultation process in 1997, the Ontario Government and Northern Ontario's tourism industry agreed to develop an over-all tourism marketing strategy for the region and implement it on the basis of a public private partnership. In 1998, the Northern Ontario Heritage Fund Corporation committed almost \$5 million over 3.5 years which gave birth to **ntmc**.

NORTHERN FOCUS

The **ntmc** marketing effort complements that of the Province's overall tourism marketing but provides a much stronger positioning and focus

playground'. Strategically, the corporation seeks to promote a total, unique winter package [snowmobiling, alpine/xc skiing, snowboarding, dog sledding, winter camping, ice fishing, ice climbing and winter festivals] and to promote the appeal of a 'different' vacation – away from crowded trails/etc. back home.

"The **ntmc** Winter Plan not only serves Northern Ontario stakeholder needs, but also addresses stakeholder needs from all corners of Ontario," says **ntmc**'s Brand Manager for Outdoor Adventure, Guy Lamarche.

MARKETS CAREFULLY TARGETTED

ntmc seeks to increase awareness in geographical target markets – as they put it – "amongst those who know us". Among market segments targeted are affluent young singles, affluent mature singles and affluent mature/senior couples, all indexed well above average considering winter travel activity in all segments and all Canadian destinations. In addition, women are also targeted as they are seen as having the major influence on vacation planning.

Under the banner campaign called *Northern Ontario: so beautiful*

it's hard to share, **ntmc** employs an extensive array of tactics to create awareness for Northern Ontario as a winter travel destination. Advertising in consumer magazines, newspapers, niche advertising in snowmobile publications, trade show exhibits at major consumer shows and aggressive public relations are among the tactics used.

Partnerships play an integral role in the marketing effort. **ntmc** enjoys corporate partnerships with VISA and with the Ontario Federation of Snowmobile Clubs. The corporation also partners with industry operators, encouraging them to develop all-inclusive winter packages, and provides them with a dedicated fulfilment piece to promote those packages. They have also developed a winter outdoor adventure merchandising program.

PACKAGING AND RESEARCH

Cognisant that products it promotes must be market driven, **ntmc** plays a pro-active role in packaging and new product development, as well as in-market research, tracking, monitoring and evaluation in order to refine and enhance its initiatives on an ongoing basis. In packaging, **ntmc** may potentially undertake the role of an inbound tour operator or packager to Northern Ontario where

it is deemed that this role cannot be adequately filled by the private sector. **ntmc** also plans to engage in setting quality/service standards for industry partners as well as tourism training and human resources development activities in partnership with relevant public and private sector organizations.

Interestingly, and of note to watch and see how these unfold, there are other business areas **ntmc** is contemplating that can contribute to its long-term objectives and to support operational self-sufficiency. These include tourist information services; a fee for service basis consulting practice focussing on product packaging, market research, tourism marketing and facility management; direct management of tourism businesses; and direct equity investment in tourism enterprises.

ntmc has set some specific objectives through to 2003. It is targeting annual direct tourism expenditures in Northern Ontario of about \$230 million. Its efforts should create over 5000 new tourism-related jobs as well as \$70 million in tax revenues to all levels of government.

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The City of Québec and Winter: a love story

Winter in Québec City has earned its place as a Canadian icon. It's more than just Bonhomme Carnaval and boat races across a broad, semi-frozen river. Winter in Québec City is, somehow, the classic winter tourism experience, and the City has been in love with winter for a long time.

This fact is not lost on the people who are responsible for marketing Québec. In 1995, tourism industry representatives from the Québec City region got

together around a game plan to make winter as important, and busy, as summer. The turning point was the development of a five-year (1998-2002) marketing plan.

The objectives of the marketing plan were: to diversify the clientele, lengthen visitor stays, grow meeting and conference business, promote Québec as a winter destination, and, perhaps uniquely in Canada, reinforce the marriage between urban tourism and the outdoors (ski, snowmobile, dogsled, soft adventure).

Increasingly, the resources of the Office du tourisme et des congrès de la communauté urbaine de Québec (OTCCUQ) have been channeled towards these objectives. Today, almost 65 per cent of the budget of the OTCCUQ is invested in winter tourism. Promotional initiatives include a "winter in the summer" campaign designed to bring return visitors during the winter from summer tourists. The results of this invest-



ment speak for themselves: over the last two years, winter visits have increased significantly, even to record levels.



PRODUCT DEVELOPMENT SUPPORTS MARKETING

Useful product development follows market opportunity. When "Christmas Carols in Québec City" was launched in the mid-nineties by businesses in Le Vieux-Québec (the downtown core), foreign media were quick to discover the quality of this initiative to animate the city during the Christmas period. It has been so successful as a tourist draw that it is now part of the development plan and has expanded to other parts of the city. Some even see "Christmas Carols in Québec City" becoming as significant to the industry as the Winter Carnival.

THE WINTER OPPORTUNITY

Québec City has long recognized that winter represents an opportunity, and has invested heavily to capitalize on it. Other places in Canada are beginning to follow the same course (see articles in this issue about Northern Ontario, the Prairies, and Newfoundland). Québec is reaping the benefits of tourism investment: with over 6 million visitors annually (of which two thirds stay more than one night), having the winter advantage is a sure winner.

Northern Lights are Canada's natural fireworks attraction

The Aurora Borealis, or northern lights, are a spectacular phenomenon that can be viewed from any of the globe's arctic and sub-arctic countries, but there is probably no better place for tourists to connect with them than Canada.

And when it comes to Aurora Viewing, the Yukon is a "hot" destination. There are nine tour operators in the Yukon now carrying basic Aurora Viewing Packages, and the growth in Aurora Viewing has been from the Asia-Pacific markets, especially Japan. "We have strong interests from the Japanese markets because of the convenient air access from Vancouver as well as the quality of service that the Yukon can offer," explained Yoshie Kumagai of Sweet River Enterprises.

PACKAGES COMBINE A RANGE OF EXPERIENCES

These packages will often combine other winter activities to provide a variety of exciting adventures. Visitors on wilderness adventure trips are also likely to be treated to a viewing in the course of their travels. "The highlight of our tour is viewing the Northern Lights while soaking in the Takhini Hot Springs", revealed Akemi Matsumiya of CJ Links. "To view the Aurora doesn't mean having to endure the cold."

Building the Yukon Aurora product has been a cooperative effort between government and local tour operators. Yukon Tourism, the CTC and a consortium of Yukon Tour Operators hosted 20 Japanese media and travel trade on a familiarization tour last February.

A TOUR SNAPSHOT

Aurora Viewing Tours have been offered by Raven Tours since 1981 and the company has had over a decade to perfect and expand its tours. The Aurora Viewing Tour itself is four hours in duration; clients are taken approximately 32km outside of Yellowknife, well beyond the city lights to a secluded viewing destination. Here, they are able to view the aurora and take photographs. Clients are served a northern snack of caribou stew or fish chowder and traditional bannock, along with coffee, tea, or hot chocolate.

The firm claims a success rate (actually witnessing the display of lights) in the winter months of 95 per cent when clients have booked three consecutive nights. Currently development plans include renovating this site with the vision of a one of a kind "Aurora Viewing Resort" to be completed in phases.

The majority of Aurora Viewing Tour customers are Japanese. The operation had 6,348 visitors last year and expects an increase for the upcoming season. Marketing plans include attending Kanata 2000 and also be offering 10 seminars with product info for consumers and retailers in Tokyo, Osaka and Nagoya (before and after Kanata). They will also be attending Showcase 2000 in attempts to attract other Asian markets such as Taiwan and Korea, although they have seen only a minimal customer volume from these countries in the past.

BROAD VARIETY

Raven Tours also offers the following optional products to give visitors a truly northern experience: Dog Sled Tour, Drive Your Own Dogteam, Aurora By Dogsled, Trappers' Snowmobile & Trail Tour, the Great Canadian Experience (which includes snowshoeing, roasting marshmallows, an ice-fishing demonstration and seal skin sliding), Caribou & Sub-Arctic Landscape Flight Tour, Dream Catcher Making Tour, as well as other customized packages.

The company works closely with the hotel sector in Yellowknife, and has a highly qualified staff from across Canada and Japan, that number approximately 95 members, with both new and seasoned employees.

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THE NORTHERN LIGHTS: FACT AND LEGEND

Back in 1621, French scientist, Pierre Gassendi, named the northern lights after the Roman goddess of dawn, Aurora. He added the 'borealis' for the Greek god of the north winds, Boreas. Since then the lights became known to scientists as the aurora borealis.

As one of the great natural phenomenon in and around Earth, the great auroras are the largest of our natural wonders. Auroral shows actually begin some 93 million miles from earth on the sun. The sun continuously sends out a stream of charge particles, largely ionized hydrogen gas that blow out into space as a solar wind. Travelling at super sonic speeds, the solar wind reaches the earth in about three days. The charged particles in the solar wind are influenced by the earth's magnetic field and are deflected toward the planet's geomagnetic poles. Solar electrons that enter the earth's upper atmosphere collide with gas molecules causing a state of ionization. Auroral light is produced by electrical discharges in a vacuum-like environment.

Folklore includes many beliefs about the Northern Lights. Throughout the centuries auroras have been variously interpreted as gods dancing in the heavens, angels fighting, ghostly spirits of dead ancestors, the reflections of great bonfires, distant volcanic eruptions, reflections of large schools of fish, whales splashing in the oceans, and icebergs floating in northern seas. In some cultures, the northern lights were a sign of omen, warning of illness, plague and death. Red auroras signalled the outbreak of war.

Folklore, history, and science together have spawned a travel-related phenomenon focused on the northern lights – a travel experience sought after by increasing numbers of travellers from around the world. In Canada, both the Yukon and the Northwest Territories are synonymous with top-notch aurora viewing destinations, but there are opportunities for aurora-viewing across Canada's north.

Developing winter on the prairies

Saskatchewan's winter product, while primarily based on snowmobiling and cross country skiing, is expanding into "new" and more unusual offerings, from dog sledding, snowshoeing and ice fishing to winter survival and ecotourism opportunities.

For snowmobilers, the province has an extensive system of groomed and signed trails – thanks to the work of snowmobile clubs around the province. While most of the

trails are concentrated in east and north central areas, a vast network interconnects towns, villages and cities, cozy urban and rural accommodations, various provincial and regional parks, lakes, valleys, rolling hills and northern boreal forest.

DOGSLEDDING BECOMING POPULAR

Dog sledding, a traditional mode of northern transportation still used

today, is growing in popularity as a new and unique vacation opportunity. Some Saskatchewan operators provide guests with training in handling the dogs and driving the sleds themselves. They can also take lessons in the sport of skijoring – being pulled on cross-country skies by a dog in harness. For those who prefer the sidelines, competitive sled dog races make a good spectator event.

Cross-country skiing is another natural choice when you visit Saskatchewan in winter. Among the notable destinations for skiers are Prince Albert National Park and Lac La Ronge Provincial Park, offering pristine northern forest and lakeland settings.

A variety of winter packages include wilderness survival training, ecotourism experiences and traditional northern activities as well as snowshoeing, ice skating, and lessons in winter survival and the sport of biathlon. Some operators offer their own accommodations, others link with various lodges throughout north and central areas, and choices range from very basic accommodations that allow guests to meet nature head on to more upscale, full-service facilities that contrast with days of outdoor wilderness travel.

Tourism Saskatchewan
1 800 667-7191

SPAS

The Spa Canada story

by Brenda Watts

Organizing the spa industry in Canada at the national level has been a goal since the late 1980s. In the late 1980s, pioneer publisher Guy Jonkman of Montréal's *Spa Management Magazine*, together with Pat Corbett from The Hills Health Ranch in British Columbia, worked with a group from Québec, led by Yvette Marchessault from the Spa at Bromont, to organize the spa industry in Canada. "I really

province of Québec. Spa Association Relais Santé continues today under the current leadership of President Jocelyna Dubuc of Centre de Santé d'Estman and now branches out to the neighbouring provinces of Ontario and Nova Scotia.

A NEW ATTEMPT

The national dream laid to rest for a few years, until there was a chance to try to host the largest spa industry

and contacting the expanding number of spa operators across the country, the Canadians put on a phenomenal show in Florida to influence ISPA to come to Canada. This event galvanized the Canadian spa industry for the first time, and became the foundation for the continuing development of the national organization.

"We have supported the creation of a national association to help us at our spa here in Moose Jaw, because we needed the support of other industry investors and operators so that we could learn from each other, network and market our industry. It has been extremely valuable for our business," says Deb Thorne, CEO of the 100 room Temple Gardens Hotel and Mineral Springs Spa.

Donna Holtom, owner of The Holtz Spa in Ottawa, says, "there is a great need for the owners, operators, and suppliers in the Canadian spa industry to work together at a national level, since creating national standards of customer care has been identified as the one of the main goals of the 100 plus membership."

1999 MARKS A BEGINNING

Followed by an organizational meeting at a subsequent ISPA conference and a meeting in Vancouver in March, 1999, the Spa Canada Association was formed and the board of directors was elected. The Spa Canada's board and committee members continue to work extremely hard to create valuable marketing initiatives for the association of 100+ members. A detailed and eye-catching brochure, a well-designed web site, and a national code of standards and practices are just a few of the many accomplishments that Spa Canada Association can be very proud of.

Abiding by their mission statement: "... to collectively market and showcase Canadian spas and Canadian spa products to the world, to establish standards and practices for all spa members and their employees to ensure the consistency and integrity of the Association, and, to strengthen Canada's position as a premier international spa destination "

Canada's resort spas, hot springs spas, destination spas, day spas, and spa suppliers are working together to build the national association and to make Canada 'a world class spa destination.

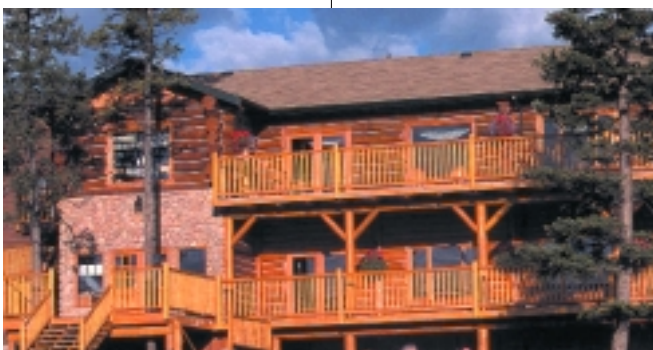
www.spacanada.com

New high-end spa in Saskatchewan line-up

Close your eyes. Imagine yourself soaking in a world class mineral spa. Now open your eyes. You are in Saskatchewan, not at some exotic European destination. Saskatchewan: where you can double your pleasure with two distinctly unique spa experiences.

"It's a huge success," says Donna Fritzkhe with Temple Gardens Mineral Spa in Moose Jaw. "We're almost always completely booked. It's phenomenal!" Temple Gardens Mineral Spa is located along the Trans Canada Highway in the City of Moose Jaw. The hotel has 96 well-appointed rooms, including 30 luxurious spa suites with 2-person Jacuzzi tubs.

Temple Gardens takes its naturally heated waters from the porous rock formations of ancient seabeds, more than 1350 metres (4500 ft.) below the earth's surface. The waters



The Hills Health Ranch in British Columbia.

felt the need to organize ourselves across our country so that the power of unity in the marketplace and for establishment of National Standards, might be good for the future," said Jonkman.

Unfortunately, this organizational attempt failed nationally. In spite of this, the Québec spa industry continued to work together and organized itself provincially. The framework from the national effort was used to create Spa Association Relais Santé in the

conference in 1997, the International Spa Association (ISPA) conference. Recognizing that the Canadian spas needed to establish their industry as a professional and emerging industry within the tourism and medical industries, leaders Pat and Juanita Corbett of The Hills Health Ranch seized the opportunity by taking a proactive step to unite Canadian spas once again.

Starting in 1995, Corbett's lobbied the ISPA hard to get the event,

were found by accident when a well was dug in search of oil. The indoor/outdoor pool is located on the top floor of the hotel offering a beautiful treetop view of Crescent Park. The pool temperature ranges from 96 to 103 degrees Fahrenheit.

The spa's Oasis Life Enhancement Centre offers a variety of therapeutic treatments including relaxation and therapeutic massages, soaks and body wraps, facials, manicures, and wellness packages. Business has been so good that expansion plans are in the works: as part of the proposed Project Moose Jaw (that will see many citywide improvements including a casino) the spa plans to add from 70-100 rooms and build a larger treatment centre.

AND THERE'S MORE !

Temple Gardens isn't the only spa in Saskatchewan, and doesn't have a monopoly on success. Manitou Springs Resort and Mineral Spa is located near the town of Watrous on the shores of Little Manitou Lake, ideally situated between the major centres of Regina and Saskatoon.

The European-style mineral spa draws its waters from Little Manitou Lake. This lake's briny waters are unique to the western hemisphere, possessing natural therapeutic skin and body care properties found only at a few places in the world – Karlovy Vary in the Czech Republic and The Dead Sea of Israel. Minerals found in significant concentrations – magnesium, carbonate, potassium, mineral salts, sodium, calcium, iron, silica, and sulphur – give the water a specific gravity of 1.06. This translates to a unique, impossible-to-sink buoyancy that helps relieve pressure on tired or aching joints. The spa has one of the largest indoor mineral pools in North America and is Canada's largest indoor mineral spa.

Overlooking the lake, the resort complex features 60 rooms and suites. Three connected pools are heated to temperatures ranging from 94 to 102 degrees Fahrenheit. An array of therapeutic and esthetic services is offered and the complex has a fully equipped fitness centre.

*Manitou Springs Resort
and Mineral Spa
1 800 667-7672*

*Temple Gardens Mineral Spa
and Resort Hotel
1 800 718-SPAS (7727)*

The evolution of Canada's spa industry

by Brenda Watts

Spa? What do you think of when you hear the word? Relaxing, rejuvenat-

ing, massage, fitness, health, therapeutic, pampering, beauty, wellness, nurturing, spiritual healing, new beginnings, invigorating, serenity, maybe tranquillity. These may be a few of the words that may come to mind, and more and more Canadians are talking about it. Why are Canadians talking about it? The spa experience is a new hot trend in which Canadian businesses are moving into.

For centuries Asian and European cultures have been practising spa techniques for the therapeutic and relaxation benefits associated with the spa philosophy. The spa philosophy encompasses four elements: mind, body, spirit and fitness. These elements promote the health and well being of individuals through fitness, nutrition and body/beauty treatments.

In Canada, people have been seeking similar spa benefits since the late 1800's when developers in the towns of Banff, Alberta and Fairmont, British Columbia foresaw the uniqueness of the locations because of their close proximity to the natural therapeutic Hot Springs in the areas as well as the magnificent surroundings. Both hot springs discoveries led to the creation of Canada's first national park Banff National Park to be followed shortly afterwards by Kootenay National Park. Stated in the Dominion Government Report of 1917 is "The accessibility of Banff, the beauty and grandeur of its surroundings, its exhilarating and healthful climate, the character and value of the Hot Springs, undoubtedly justify all expectations that Banff will eventually be the chief health and pleasure resort of Canada".

EXPANSION HAS BEEN RECENT

There is much in that 1917 report that may continue to hold true. However, it is only in the last twenty years that other tourism operators including resort/hotel spas, destination spas, day spas and mineral spring's spas across Canada, have started to tap into Canada's natural spa resources and practice relaxation techniques. This is the Canadian spa industry and they are proving to the world why Canada offers such a spectacular and unique spa experience.

Carol Seale of Fairmont Hot Springs, BC comments "A number of famous people have come to our hot springs, not only to relax and enjoy the beautiful surrounding but also for health reasons. This includes former Prime Minister John Diefenbaker and his wife Olive. Over thirty years ago Mrs. Diefenbaker, crippled with arthritis, would arrive here at the hotel seated in a wheel chair but would leave walking after soaking in our therapeutic mineral waters. Today many people continue

to visit our hot springs for this reason, as well as the beautiful surroundings and genuine hospitality."

Canada's well known friendliness and welcoming hospitality is a repeat draw for visitors from around the world. Then again, so is our pristine environment, our glorious mountain lakes, our open prairies, sophisticated cities, and calming oceansides.

Comments from visitors prove that Canada's natural beauty is a draw, such as a couple from New York City states, "we did not know what air was really supposed to smell like and Canada is so fresh." Today entrepreneurs with a strong business sense and knowledge of the benefits of spa services are only adding to the desire to visit Canada. By fulfilling one of the requirements, a spa must be situated in a natural setting that is conducive to relaxation and accessible to the public, the Canadian spa industry is rapidly growing right across the country.

CHANGING PERCEPTIONS

Only in the last ten years has Canada's public perception of the spa industry started to evolve and the last five years opinions on the subject have changed rapidly. The spa experience has evolved from being seen as beauty or luxury treatments to rec-



*Mud bath.
Ste. Anne's Country Inn & Spa, ON*

ognizing the therapeutic and health benefits of all spa treatments. In the *Spa Resorts in Canada* report by ISTC Tourism Canada (1991) it is stated that North American spas go beyond the traditional or European concept of a therapeutic spa, and instead are looked upon as a place where one can go to break away from routine, adopt a new mental physical program and to rejuvenate.

With a more stressful lifestyle from demands at work and home, the public has come to recognize the health benefits in taking some-

time to re-energize and to appreciate the preventive aspects of looking after the mind body and soul. Marie Picton of the Spa at the Elmwood in Toronto comments: "the consumer is looking at Spa going, whether it is for one hour retreats or holiday retreats to spas, as a way they can prevent disease or be better able to cope with a disease. We all know the therapeutic benefits of having a massage, as a prevention measure."

The public's perception will continue to strengthen and become more complex in the next 10 to 20 years. More and more people are becoming informed about the spas available to them from information on the internet, magazines, newspaper articles, and referrals from their families and friends. Rebecca Ryan, General Manager of Ste. Anne's Country Inn & Spa in Ontario predicts there will be multiple full service spas located in every major city, hotels will build spas into their existing locations. Housing complexes for baby boomers will be built around a full team approach to personal care. This includes doctors, dentists, holistic health care practitioners, spa specialists and hair stylists. The baby boomers will be interested in anything that will allow them to maintain a high quality, independent lifestyle.

Susan Bartlett of the Inn on the Lake, Nova Scotia explains "We are in the process of adding spa services to our hotel for a number of reasons including, increasing our destination marketing opportunities, creating value added packages for our guests, and to provide services for the local community as well as travellers." This is an excellent marketing option for the Canadian hotel and spa industry because by adding spa services to a hotel, it permits increased cross marketing opportunities to visitors as well as the community.

ENORMOUS GROWTH POTENTIAL

The future of the Canadian spa industry requires that spa industry leaders continue to educate the public about the benefits of the spa experience, offer full-service spa treatments at affordable prices, and provide accessible spa locations for all the public to participate in the spa experience. By encouraging the health and well being of individuals through fitness, nutrition and body/beauty treatments in a spa setting, the spa industry upholds the philosophy of mind, body, spirit and fitness. If this continues, the future of the Canadian spa industry will have unlimited potential as demand for spa services increases.

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SEE "TYPES OF SPAS" ON PAGE 10

Market demand validates Spas Ontario launch

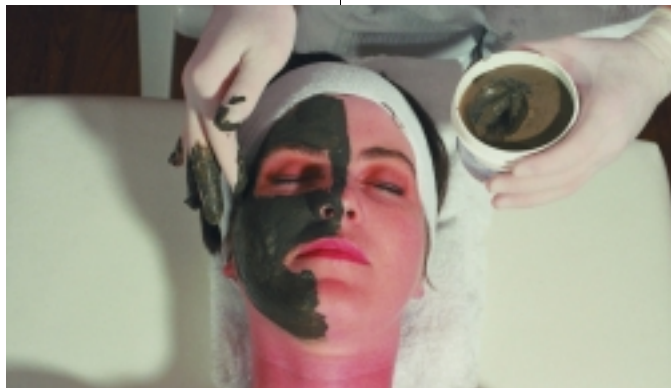
The twelve founding members of Spas Ontario are already reaping substantial benefits as a result of the eighteen months they spent to develop and launch the association. Representatives of three Toronto day spas and nine resort spas are determined to prove that quality spa treatments are much more than pampering and pedicures.

Spas Ontario members have modeled their healthcare services and consumer education priorities to be consistent with the best of European practices which provide natural methods to reduce stress (and related illnesses) and manage pain. Spas Ontario confirmed their serious commitment to providing quality healthcare by establishing stringent standards for members, along with bylaws and an organizational framework; then, contracted an agency with tourism marketing expertise to orchestrate the launch and maximize the spin-off.

Media invited to the launch included key tourism and health journalists from print and broadcast fields, along with special guest, Ontario Minister of Health, Elizabeth Witmer who observed that "...the services you're offering are very significant for the population of the Province" and that "...we're trying to shift the focus from illness to wellness and accountability". Mrs. Witmer reinforced Spas Ontario members' commitment to providing quality healthcare services that are complementary to traditional healthcare.

Guests at the launch sampled a variety of spa treatments and services showcased by the members, and subsequent newspaper articles sparked almost 1,000 requests for the 24-page *Premier Spas in Ontario* booklet – within three weeks of the launch. Daily requests for the booklet continue as a result of a presence in

SpaLife Magazine and the Ontario Fall Touring book. (To date, geographical requests come from coast-to-coast in Canada as well as the New England states, Pennsylvania, New York, Ohio, and Texas.)



Full-service spas are becoming a major attraction in Ontario

CRITERIA-BASED MEMBERSHIP

Numerous inquiries were immediately fielded from prospective new members, and the association was ready with a membership package and inspection procedure. The stringent membership criteria ensures that quality treatments and services are provided by highly trained, registered and certified health and wellness professionals. Member spas must provide at least five private treatment rooms with a full time receptionist on duty during operating hours, offer a minimum of three body treatments, and skin care services, plus a minimum of four hydrotherapy treatments. In addition, certain procedural compliances must be adhered to, such as the code of conduct, client assessment, privacy, and confidentiality, and conscientious implementation

of Ministry of Health requirements involving hygiene and sanitation.

A three-year marketing proposal has been submitted to the Ontario Tourism Marketing Partnership to allow the association to build on the momentum and to implement a concerted consumer and travel trade marketing strategy while developing new spa members, marketing partners, and a prestigious associate membership roster.

There are early indications that this aggressive association is stimulating a Canadian supply sector, as

potential sources of therapeutic mud and marine products have recently been identified in Canadian locales. Because of the emerging importance of spa services in Canada, certain entrepreneurs are examining the viability of "mining" the products that have historically been imported from Europe. In addition, Spas Ontario members are becoming involved in curricula development and standards at Ontario aesthetic schools.

All members report a substantial increase in business over last year for the same period, and can attribute a significant number of reservations or appointments directly to membership in Spas Ontario. In addition, some resort spas report that their summer spa business saved them from an otherwise dismal season, given the inclement weather this past summer.

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Wellness packages popular in German market

Wellness packages have become one of the fastest growing product segments in Germany. Major tour operators such as TUI and Terramar have replied to this trend by publishing special catalogues just for fitness/health/wellness trips. Most packages include travel to European destinations, in particular to Germany, Austria, Switzerland and Italy. Popular long-haul destinations are Indonesia, Sri Lanka and South Africa.

Wellness packages are usually booked as a secondary trip. Their average stay is from seven to fourteen days. This makes selling long-haul destinations a bit difficult. Germans rather look for smaller properties with good food and a personal service. "Being pampered" is crucial for successful wellness products. Consumers usually look for country-specific treatments, e.g. original Ayurveda treatments in Sri Lanka or thalasso therapies in Northern Africa or France.

Product offerings should include the usual facilities such as indoor pools, hot tub and massage – when targeting a younger audience, fitness and sports facilities are also an absolute must.

CANADIAN EXPERIENCE IMPORTANT

For long-haul destinations, wellness products can hardly be sold on their own. They rather should be a package component, e.g. a fly-drive with a stay at a resort in a not too remote area. It would help if wellness facilities had a special "Canadian touch" such as native herbal treatments or similar. Germans also prefer properties in perfect harmony with nature, e.g. a log-cabin-type resort in the wilderness. The preferred category usually is three to four diamonds/stars.

Interested suppliers with appropriate products might wish to contact one of the German market leaders for wellness packages, IKD in Munich who also publishes a worldwide hotel guide on the Internet (www.wellnessfinder.com) in German and in English. This website provides an excellent overview on the needs of German travellers.

TYPES OF SPAS

Looking for a spa to visit? Trying to decide on what type of spa you should visit? Do you know the differences between the type of spas? First of all in choosing a spa, you must decide on the purpose of your spa visit and what services you are looking for. Spa Canada Association defines four major categories of spas to help you ensure that your Canadian Spa Experience is second to none.

DESTINATION SPA

A facility totally dedicated to the spa experience, featuring spa cuisine, professionally administered treatments and fitness programs designed to enhance your health and well being.

RESORT/HOTEL SPA

Found in cities, at the ocean or tucked in the mountains, this spa adds the dimension of health, wellness and pampering to a hotel or resort.

MINERAL SPRINGS SPA

Whether hot or cold, these waters enhance the services and treatments offered in the spa through their restorative and health-giving properties.

DAY SPA

A destination in itself for the busy traveller or person looking for a few hours of professionally administered treatments in a tranquil and serene atmosphere.



Photo : Frederic Alm

Icehotel Sweden

Canada's first "Ice Hotel"

After many years of popular success for an ice hotel in Jukkasjärvi, Sweden, the Canadian promoters of Ice Hotel Québec/Canada and their partners are set to go. As planned, this amazing feat of architecture will open its icy halls to visitors from all over the world on January 1st, 2001 at the beautiful site of the Parc des Chutes Montmorency near Québec City, Canada.

The Swedish counterpart at Jukkasjärvi has been built every winter for the past ten years, and brings thousands of visitors from all over the world each year. All are dazzled by its beauty, sheer size and quality of its design and artwork carved out of snow and ice. Jacques Desbois, and his team of skilled artists, will display their flair

and talent in the construction of the Ice Hotel, while giving it a unique Québec flavour.

EXTENSIVE PREPARATION

After close to five years of dedication and hard work, the partners Jacques Desbois, Francis Léonard and Yvon Guérard are geared to launch operations starting October 2, 2000. With the support of Tourism Québec and our site partner the SÉPAQ, this amazing project has come to life in a big way. After months of presentations, the Ice Hotel marketing team has achieved success in interesting prestigious private sponsors in this project. They will be introduced over the next few weeks. "At first, when we met with sponsors, they

thought we, and especially our project, were somewhere from outer space, few believed in us but we persevered and finally won them over." says Francis Léonard, Vice President of Marketing.

The new project has grabbed the attention of media world-wide, from India to Qatar, Australia to all over Europe. The Ice Hotel has also benefited from special media coverage both in the United States and Canada. The Globe and Mail, La Presse, Châtelaine, USA Today, Denver Post, New York Daily News, Ski Magazine and Condé Nast are some of the print media that featured articles on the Hotel. CBS, CBC-SRC, TVA, TQS, CTV and many other radio and television stations have also produced news reports.

This attention resulted in an outpouring of inquiries from travel agents, tour operators and the general public. "We are proud to announce, as of today, that more than 1,000 individual reservations have been made and that more than 1,000 people are expected to attend a multitude of special events hosted at the Ice Hotel. These numbers well exceed our expectations and we can therefore predict an outstanding success." stated Jacques Desbois, President of Ice Hotel Québec/Canada.

www.icehotel-canada.com



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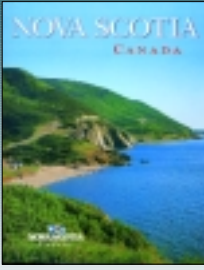
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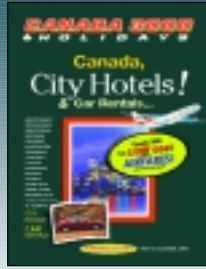


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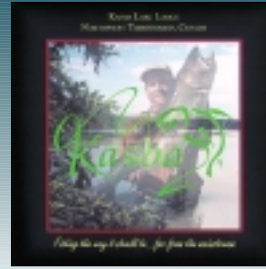


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New entrants flock to Canada's airline industry

by Bob Mowat

Canada's airline industry is a hive of activity these days and not all of that activity is the media taking swats at the country's dominant carrier, Air Canada. Since the merger of Canadian Airlines with Air Canada, a host of carriers have declared their plans to either launch or expand existing services in an effort to fill the gaps that are clearly being left as AC integrates Canadian's operations with its own.

In terms of new entrants, Canada has seen:

- The arrival of CanJet
- The move east by WestJet
- The announcement of plans for service by RootsAir
- Added capacity and equipment by carriers like Canada 3000, Royal Airlines, Air Transat
- And the appearance of regional/local operators like Capital City Air in Edmonton and LondonAir of London, Ontario

It is, as Charles Dickens noted many years ago, the best of times and the

worst of times. While all of the new arrivals deserve praise – and the same goes for the major charter carriers – for latching onto the opportunity that exists, there is still a long way to go before Air Canada is really going to be challenged by any of the existing competition in the market place.

The following is a look at some of the changes that have or are taking place in Canada's airline business:

WESTJET

Sticking to its game plan, WestJet has arrived in the east, adding planes and routes to bring its successful style to this part of the country.

The carrier has announced that beginning Nov. 20 – when it adds new aircraft – it will expand its schedule by 47 flights a week. The new service will be focused on five cities – Regina, Winnipeg, Thunder Bay, Hamilton and Ottawa – and feature 737-700 equipment.

In the late part of the summer, WestJet had unveiled plans to acquire six Boeing 737-700 aircraft,

plus option on a further 18 of the planes. Currently, WestJet operates 18 Boeing 737s to 15 Canadian cities. Company officials note that the fleet expansion with new generation Boeing equipment is part of its plan to expand its operations across the country. For more, check out www.westjet.com

CANJET

In late September, CanJet begin its operations with service to Montréal, Winnipeg and St. John's, Newfoundland. The carrier had originally launched service on Sept. 5 with a flight from Halifax to Ottawa.

A division of I.M.P. Group International, entered the marketplace promising to offer Canadians "everyday low fares" in an effort to stimulate short-haul air travel by shifting people from cars, buses and trains into the sky.

The company has also established a tour division to promote air, hotel and car packages in the cities that it services. For more, go to www.canjet.com

ROOTSAIR

Skyservice and Roots got together earlier this summer to launch RootsAir and the carrier is still getting its plans in order. Those plans call for the creation of a full-service

carrier with daily flights on routes that will include Vancouver, Calgary, Edmonton, Winnipeg, Toronto, Montréal, Ottawa and Halifax. Some select cities in the United States, including Los Angeles, are also on the drawing board.

RootsAir plans to use Airbus A320s and A330s for its flights. Try www.rootsaair.com

CANADA 3000

It has been a big year for Canada 3000. The carrier has floated a successful IPO, posted strong numbers on its first quarter 2000 results and continued to upgrade and expand its fleet.

And while many view C-3 as a charter carrier, company officials are quick to point out that most of its operations are scheduled service, in fact earlier this year, it was awarded sched service status for flights between Canada and the United Kingdom; Germany; and France. In fact, Canada 3000 – just after the merger of AC and Canadian – was quick to start billing itself as "Canada's second largest scheduled carrier."

The carrier operates a fleet of Airbus A320s and A330s plus Boeing 757s and last year, served 2.7 million passengers. Go to www.canada3000.com

ROYAL AIRLINES

The Montréal-based carrier has been busy over the summer, following its strategy of providing a "valid alternative" to Air Canada. Royal's chairman, Michel LeBlanc has been high profile in the last little while as he guides the carrier through the second phase of its "evolution" from charter carrier to scheduled airline.

Royal has unveiled an expanded schedule, service enhancements, fleet additions and hired more staff. For more information, go to www.royalairlines.com

AIR TRANSAT

Air Transat is adding new aircraft to its fleet that will eventually increase its fleet to 23 planes. The carrier announced plans to add Airbus A310-300s in late summer in order to strengthen its position in the charter market, while increasing the efficiency of its operations. For further information on Air Transat, try www.airtransat.com

Bob Mowat is Managing Editor Canadian Travel Press and a contributor to Communiqué
bmowat@baxter.net

SELLING CANADA

Expanding winter rail travel is opening up new commission opportunities

by Fred White

Seeing Canada's winter landscapes close-up, and in complete comfort, is an experience that is appealing to more and more Canadians who do not want to spend their winter getaway or vacation in one place. Every minute of your client's journey is a sightseeing tour, with every opportunity to stretch out next to a big picture window and see the best that Canada has to offer. Clients can also mix and match virtually any additional winter activity according to their taste. The following are just a few examples:

Via Rail's "Snow Train to Jasper" is an all-new opportunity to experience land touring at its best with famous *Silver and Blue Service* aboard the transcontinental *Canadian*.

Packages include premier accommodations at Jasper Inn Alpine Resort, Jasper Park Lodge, Mountain Park Lodges; world-famous sightseeing areas like Maligne Canyon; city attractions like West Edmonton Mall, and every kind of winter activity including Ski Marmot Basin. Custom packages can also be built to suit your clients' interests and budgets. Departure and arrival locations are Vancouver, Jasper, Edmonton, Saskatoon, and Winnipeg. For wholesale rates and information, contact Brewster at **1-800-661-1152**, or John Steel Railtours at **1-800-998-5778**. Additional tour operators in Manitoba and Saskatchewan are now being negotiated. For other snow-routes in eastern and western Canada, contact VIA Rail.

Ontario's Algoma Central Railway, famous for fall-colour tours to the Agawa Canyon, operates the "Snow Train" on weekends, Dec. 30/00 to March 17/01. Your more adventurous clients can take the regular passenger service to Hearst for wilderness lodge getaways, or load up their equipment for authentic outdoor and snowmobile adventures. For rates and information call **1-800-242-9287**.

B.C. Rail's Cariboo Prospector departs Vancouver for Whistler. Non-skiers can continue on the

161-kilometer Cariboo Gold Rush route. Four-day "Spa Spoiler" package includes two days at the Hills Health and Guest Ranch for the full health-spa treatment, and runs now till April 26/01. "Snow Days" package on the same route, at roughly the same price, includes resort accommodation, snowmobile & sleigh rides tours, with lots of time to explore. For rates and information call **1-800-663-8238**.

Fred White is President of Travel Communications Group Inc., Toronto, and a Communiqué contributor
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Major events, major sponsors, major growing pains

by Teresa Earle

The crisp, sunny days of late winter attract adventure-seeking visitors to the Yukon. For many, the spectacle of the Yukon Quest International Sled Dog Race is a major draw. The 1600 km, 14-day event is an early example of the 'extreme racing' phenomenon that is now so popular around the world. Showcasing romantic and often harsh aspects of the Yukon lifestyle and environment, the event has become a cornerstone winter attraction in a suite of Yukon events that include *Sourdough Rendezvous*, the *Frostbite Music Festival*, *Trek over the Top* and *Thunder on Ice*.

Major events like Quest require strong partnerships to achieve their tourism potential. Throughout its 18 years, the Quest has enjoyed strong support from local sponsors such as NMI Mobility, Canadian Tire and the High Country Inn. However, the needs of a growing international race necessitated a bigger name with deeper pockets and a hunger for media coverage. In 1997 the Quest signed on with Fulda Reifen, a German multinational tire maker, for a sponsorship deal that would provide much needed cash and profile to the event. The deal was terminated after just two years, and for the 2000 race, the Quest board signed a short-lived contract with Kaufman Footwear, the maker of Sorel winter boots.

BRANDING IMPORTANT TO PARTNERS

"The Yukon brand stands for so much – pure, strength, outdoors, rugged – it has become very attractive to corporations that seek to associate themselves with these characteristics," says Rod Raycroft, Manager of Mass Communications for Tourism Yukon. "Starbucks has a Yukon coffee, there's a Yukon fleece outerwear company – the Yukon Quest is very marketable as an icon of Yukon values."

The Quest organization knows this – they bank on the event's appeal to draw corporate sponsorship. This is an expensive race to run – not so much from an operational standpoint, but mainly because the size of the purse is what draws world-class contenders from North America and increasingly from overseas.

Fulda already had strong ties to the Yukon government's tourism branch. With winter tourism and incentive travel starting to take off

in the Yukon, the dynamic between government, Fulda and the non-profit Quest became complicated when the Fulda-Quest relationship eroded.

"As a board, we were naive," says Anne Tayler, a past board member and wife of renowned Yukon musher Frank Turner. "We were relatively new to this kind of deal. And then it felt like it was our responsibility to keep Fulda and their incentive program in the Yukon, even though the board concluded that the relationship wasn't working for the Quest."

LEGAL ADVICE ESSENTIAL

For the Quest's volunteer board, dealing with 'major league' corporate sponsors has been an educational process. Tayler acknowledges that homegrown events like the Quest often don't have the know-how or corporate savvy that is required. She sums up some key points for



the benefit of other organizations facing similar challenges.

"It's most critical to match the sponsor with the event. Your philosophy, goals and operational style must be compatible. Our eyes weren't open with regard to things like selling Quest product. We were a cash-rop organization, and the tendency when you are broke is to respond to a deal like you are in heaven." They also didn't factor in sponsor maintenance or agent fees. "You should set aside at least 20 – 30 per cent of the cash to service the sponsor, pay the agent and cover any related costs."

David Porter concurs. He is past-president of the Canadian Quest board, and is quick to point out the extent of the learning curve this organization has overcome to get where it is today. "My advice to other sponsor-seeking boards: take a lawyer with you. We didn't know

enough about the process, we were too trusting, and we didn't read between the lines."

The sponsorship deal with Canadian bootmaker, Sorel, did seem like a match made in heaven. However, Sorel was also a company with an uncertain future, and its financial problems led to premature termination of its deal with the Quest.

Given the lessons of the past few years, the Quest board rallied quickly and has been in discussions with a prospective major Canadian sponsor for several months now. The board had engaged the services of a consultant in recent years, but the current prospect actually approached the Quest. Another sign of the maturing of the Quest organization is the professional sponsorship package they have developed.

ONLY PROMISE WHAT YOU CAN DELIVER

Other lessons along the way have included gaining media awareness and knowing the organization's capabilities. As Porter noted, in the heat of the moment it can be easy to promise someone the world to get to where you want to be. He emphasized the importance of only promising what you can deliver. "We have become acutely aware of watching

The 2001 Yukon Quest is scheduled to start on February 11th in Whitehorse and it usually takes the winner between 10 and 12 days to cross the more than 1,000 miles of harsh terrain to reach the finish line in Fairbanks on the Chena River at the Cushman Street Bridge in Fairbanks, Alaska.

Upon leaving the starting line, mushers travel through checkpoints at Braeburn Lodge, Carmacks and Pelly Crossing before reaching the midway point at Dawson City, where they are required to take a 36-hour layover. After leaving Dawson, mushers cross into Alaska and go through a number of checkpoints before reaching the finish line in Fairbanks.

www.yukonquest.yk.ca/

this classic Yukon event is finding its way into the spotlight.

Teresa Earle is a writer in the Yukon and a contributor to Communiqué

Spa products add to tourism economic impacts

by Brenda Watts

Refreshing relaxation, soothing surroundings, and invigorating landscapes are only a few unique selling points for the Canadian spa experience. Complementing the Canadian spa experience are the truly unique healing spa product lines available on the international market in which Canadian businesses are now entering.

To begin with, there are the ancient spa salts from Saskatchewan that are being mined, bottled, and sold by the Canadian company *Pinnacle Minerals* in Saskatoon. These special sea salt crystals are from ancient sea water that has been untouched for millions of years. The salt crystals are being extracted from 3,000 feet beneath Saskatchewan's Great Plains for their natural healing properties. *Pinnacle Minerals* have been marketing their Canadian spa salts internationally for over 2 years, and can boast at being as good as any other spa-salts in the world for exfoliating!

Malcolm Leggett at *Pinnacle Minerals* comments, "We've been taking our salts to the international markets fully believing that our Saskatchewan minerals are equal to, or superior than, any of our competition in all parts of the world. The biggest challenge is to get the word out to the spa owners and operators, and that is what we are focused on!"

continued on page 19

Cross-training alleviates seasonality and labour shortage issues

With a shrinking labour pool, tourism industry employers have to be creative to attract and retain staff. Only 42 per cent of Canada's tourism workforce is employed full-time – and 23 per cent are employed seasonally (CTHRC-1998) – but businesses are quickly discovering that providing year-round employment pays off in a big way. "Keeping committed staff on year-round offers us consistency. We have a history with these people and they understand our culture," explains Chris Wrazaj, Director of Recruitment for Intrawest. "And, (cross-training) reduces our recruitment costs."

Intrawest's Panorama property in British Columbia opened a golf course last spring. "Ramping up summer projects means that our shoulder season is shorter," says Wrazaj. Of the eight tourism sectors, the adventure & recreation, attractions and food & beverage sectors offer the smallest percent of full-time employment at 24 per cent, 33 per cent and 35 per cent respectively of their overall employment.

CROSS-TRAINING NOT A NEW CONCEPT

Some independent resorts have been cross-training for years. "The reasons we cross-trained were economic in the early 90's. Now we need to because staff resources aren't available otherwise," explains Peter Elmhirst, owner of Elmhirst's Resort

in Keene, Ontario. "I think cross-training is the reason we retain people," adds Elmhirst's Resort Director of Human Resources Anne Marshall. Rather than hiring specialists, they opt to hire individuals who are interested in working in a variety



Sleighriding at Elmhirst Resort.

of areas. "For example," explains Anne, "when I hire someone to work in food & beverage they may also have experience with horses."

Working in different areas increases the knowledge that staff have of the resort and they provide a better service to guests because they are more aware of what the property can offer. "If our fishing guide is bartending the night before an outing, he can encour-

age guests to get involved and share stories with them about past trips. Guests comment that they are getting more and more information from the same people," says Anne. "And, keeping staff busy year-round means that the employees are here when the summer guests return." Their summer waterfront staff may help, for example, with ski outfitting, shoveling and stacking wood during the winter. "If we provide this employment, they won't look somewhere else," concludes Anne.

employees. "When we help our employees to find summer employment it often means that they will come back in the fall when we need them," says Wrazaj. "Being able to provide these types of experiences builds loyalty," he adds. But, he is quick to point out that even with the best intentions of employers, there are financial realities. "We still have shoulder seasons and we can't run fully staffed at all times. But, we aim to give our employees as close to full-time work as possible," he says.

Many ski resorts, and other seasonal businesses, have lodging and food & beverage services year-round and need housekeeping room attendants, front desk agents, guest services attendants, food & beverage servers and bartenders throughout the year. Intrawest owns eleven properties. It's Canadian properties are Whistler Blackcomb, Panorama, Mont Tremblant, Blue Mountain and Mount Ste. Marie.

It is evident that cross-training is becoming more necessary to address labour shortage and seasonality issues in Canada's tourism industry. With self-directed, industry-created training tools for over 40 tourism-related occupations, the Canadian Tourism Human Resource Council can help employers to cross-train staff and overcome these issues.

COLLABORATION WITH BUSINESS COLLEAGUES

Businesses also collaborate to share staff. For example, for their peak winter season, Canadian Intrawest properties recruit employees from off-season properties in northern Florida. And, when Intrawest's shoulder season is approaching, other businesses are invited to come and interview Intrawest

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Feds must ensure viability of airport infrastructure

The Coalition of Concerned Airport Users (CCAU) is pressing the federal government to reduce costs to consumers at airports and to ensure the viability of the nation's airport infrastructure.

While the Coalition strongly supports the government's decision to devolve responsibility for management of Canada's airports to local airport authorities, the Coalition urged federal Minister of Transport, the Hon. David Collette, to consider modifications to the existing policy to ensure the future viability and availability of air service to Canadians. The Coalition is concerned that key elements of the current policy are creating significant and growing financial problems for airport users. Canada's large airports have been forced to pass on the high costs of

federal rent to airport users while many smaller airports face an uncertain future due to federal cost downloading, negative impacts from recent restructuring in the airline industry and high capital costs.

Speaking on behalf of airport users, Anthony Pollard, President of the Hotel Association of Canada and Chairman of the Coalition of Concerned Airport Users, expressed his concern that rising air travel costs will have a chilling effect on economic growth. "People have finite resources. Whether it is a businessman cutting a business trip short to save a few dollars, or a family choosing a destination outside of Canada because the cost of air travel is less expensive, high air costs are having a direct impact on Canadians. My members are feeling the impact directly."

CURRENT SITUATION NOT SUSTAINABLE

"The federal government must establish a new, fair set of fiscal policies for airport industry rent which are based on internationally recognized principles of reasonable and transparent cost recovery", said Cliff Mackay, President and CEO of the Air Transport Association of Canada. "The current situation is simply not sustainable. A new financial formula is urgently needed that is based on real costs, rather than the current method which is based on assumptions that have now been shown to be inadequate. Now is the time for the federal government to address this issue before the cracks in the system begin to materialize."

The Coalition of Concerned Airport Users was established to facilitate a national dialogue on the need for higher quality, cost effective airport services and the fair treatment of Canadian air travellers and airport users. Coalition members represent thousands of individual businesses

and air travel consumers who are affected by the current National Airports Policy and to whom the cost and quality of air travel in Canada is an extremely important factor in overall competitiveness.

The Minister of Transport will soon report to his Cabinet colleagues with the results of the first significant review of the National Airports Policy since it was established in 1994. As a consequence, the CCAU strongly believes that now is the time to address the deficiencies in the National Airports Policy to ensure the future viability and availability of air service to all Canadians.

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(French version available, English version in preparation). A tourism clientele study is under way and will be published later this year.

The Spa Association "Relais santé," coordinating partner of the Club, is a non-profit organization founded in 1993 to maintain high standards for quality and professionalism in the industry. The primary mission of the Association is to set standards for the various clienteles and require and guarantee excellence from its members.

Lucie Oceau
1 800 788-7594



Going international with health tourism

The Health Tourism Product Club is a consortium of partners whose goal is to help develop and improve health tourism in Canada. Its partners are the Spa Association "Relais santé", Tourisme Québec, the Canadian Tourism Commission, Spa Manage-

"In creating the Health Tourism Product Club, we wanted to give a boost to the entire Canadian health resort industry, and provide it with tools to promote the high quality and appeal it offers and position itself well on international

Club was created to carry out research that will enable the Canadian industry learn more about itself and thus be able to better respond to the needs of its regional, national and international clientele. The Club also distributes information to the tourist industry, the health tourism industry, travel agents, the media, etc., as a way of raising its profile. The Club's goals include sharing the benefits of its work with the entire Canadian health tourism industry.

STUDIES LEAD TO NEW PACKAGES

The Club's many studies, some of which have already begun while other are completed (inventories of Canadian health centres, research on the types of care available in Canada, market studies, international trends, etc.), have led to the creation of new packages and products that are then offered through Club partners. The Club has already developed three new packages (Le Baluchon, Centre de santé d'Eastman and Manoir des Sables) in its first year and has just completed its most recent study, *L'ABC des vacances-santé*, a practical guide to health resorts in Canada



ment, Spa Esthétique International, Algologie, Bouvier Hydro, Groupe PBO and Laboratoires Valmont. The Club's mission is to Make Canada an internationally recognized health tourism destination.

markets as an exceptional year-round vacation destination," says Jocelyna Dubuc, Club spokesperson and President of Spa Association "Relais santé."
The Health Tourism Product

TIAC hosts ground-breaking seminar

The Tourism Industry Association of Canada teamed up with Parks Canada and the Canadian Tourism Commission to host a "Smart Tourism Task Force" to examine the tourism industry's response to the findings of the report from the Panel on Ecological Integrity in Canada's National Parks.

The two-day workshop was held in Hull, Québec on September 28 and 29. Invited participants represented various sectors of the tourism industry that are involved with operations in National Parks, including ski, golf, and adventure, as well as staff members from TIAC and Parks Canada. The participants had been provided with background material prepared by tourism development experts in their respective fields, and the workshop was facilitated by TIAC Board Member Gordon Phillips of The Economic Planning Group.

COLLABORATION SEEN AS THE KEY

The report from the "Ecological Integrity Panel" has been the subject of broad concern among Parks-based operators since its release early this year. Tourism businesses regard the findings of the report as a shift in emphasis from recreation-based management to ecology-based management, and are concerned that prominent lobby groups of environmentalists may have had an opportunity to shape policies that will make parks less people-friendly to park visitors. In some cases, there are fears that tourism businesses will be shut out of parks altogether.

Despite these concerns, there was a broad acceptance among the participants at the workshop that the ecological integrity of Canada's National Parks is of paramount

importance – but that the devil is in the detail. Industry and Parks Canada representatives alike acknowledged that a climate of collaboration between the industry and Parks Canada at local and national levels would go a long way towards finding workable solutions for some of the difficult issues that face both resource managers and tourism operators and developers.

"The future of tourism in National Parks is very important, and we must not forget that people are as important to the Parks as they are to the tourism industry," says Crosbie Cotton of the National Parks Ski Association. "There was a willingness at the workshop to seek cooperative solutions; good creative thinking and working together will take us in the right direction."

Kim Whytock, Director of External Relations Branch for Parks Canada, told *Communiqué*, "it was encouraging to feel that there was a shared responsibility for ecological integrity, and that collaboration between all interested parties will ultimately serve the best interests

of them all." He emphasized that "collaboration, not confrontation, is the way to go."

TIAC TO INVESTIGATE ITS ROLE

Phillips told the meeting that he would be preparing a report on the workshop for the Board of Directors, and that the Board would determine the form and substance of a presentation at the TIAC National Conference in November. TIAC has an extensive history of examining the issue of environmental sustainability in the tourism industry, having hosted a task force on sustainable tourism in the early part of the last decade which resulted in a lengthy documentation of sustainable tourism practices for most tourism sectors. TIAC was also responsible for the now-defunct Governor General's Conservation Award, an annual award that, over a decade or more, recognized the contribution of environmental leaders such as geneticist Dr. David Suzuki and artist Robert Bateman.

Big creatures, big business

The International Fund for Animal Welfare has released a study which says that whale watching has become a billion-dollar industry carried out in nearly 500 communities around the world. Altogether, 87 countries and territories have such tours. The report said the number of whale watchers had increased to nine million in 1998 from a little more than four million in 1991, and 5.4 million in 1994. Total whale watching tourism expenditures grew to \$1.049 billion in 1998, up from an estimated \$504 million in 1994. The full report is available at www.ifaw.org



Parks Canada/Hughes Michaud

For the love of whales

It isn't easy for a whale to have a peaceful meal in the St. Lawrence River. Ask the people on the whale watching cruises. Ask the staff at the Saguenay-St. Lawrence Marine Park. Ask the scientists studying the region's marine ecosystems.

The diverse species of whales drawn to the rich feeding grounds in the St. Lawrence estuary have become the star attraction for tourists, and the attention they receive is affecting their feeding efficiency. That's a major cause for concern at the Saguenay-St. Lawrence Marine Park, created in 1998 to help protect the region's marine ecosystems. It's also a serious issue for the area's whale researchers, whale watching companies, the tourism industry, and various interest groups whose representatives are currently working with the marine park to improve the situation.

THE SITUATION

The Saguenay-St. Lawrence Marine Park, part of Parks Canada's cross-country network of protected natural areas, is one of the most heavily visited whale watching destinations in Canada. During peak season, from

June to September, an average of 150 cruises a day set out in search of whales, ferrying an approximate 300,000 visitors a year to and from whale watching sites. Pleasure boats and the St. Lawrence River's heavy shipping traffic add to the pressure on the animals.

In collaboration with the marine park, scientists from the Tadoussac-based Group for Research and Education on Marine Mammals (GREMM) used VHF transmitters to track 25 fin whales, the most intensely watched because of their predictable feeding habits. The researchers studied the movements of these huge marine mammals and compared behaviour patterns in relation to the numbers of boats present.

WHAT THE STUDY REVEALED

Fin whales alter their diving behaviour in the presence of large numbers of boats, with a possible negative impact on feeding efficiency. This effect can be compounded when vessels make quick approaches and when they change direction suddenly.

SOLUTIONS

A voluntary code of conduct, developed by the marine park in cooperation with whale watching companies,

is currently in place to minimize the risk of disturbance to whales. It urges captains not to approach when a whale is less than 200 metres away, to travel at reduced speed when the boat is between 200 and 400 metres from a whale, and not to approach a whale by cutting off its path. Whale watching clients are encouraged to select a company which complies with this code of conduct, and which offers an interpretation service.

Meanwhile, a group representing the economic, environmental and social interests of the region – the marine park, whale watching companies from 7 different ports, regional tourism groups, local municipalities, the federal Department of Fisheries and Oceans, and GREMM – are joining forces to implement a 3-year action plan to enhance the protection of the whales, improve the quality of onboard interpretation, and better manage these activities.

Currently under discussion are measures to:

- implement a moratorium on the number of boats offering observation activities at sea
- issue permits for cruise operators,
- reduce the amount of time boats can spend in heavily used areas,
- diversify the content of excursions, and
- improve educational programs aboard boats.

This cooperative effort was recently applauded in "Case Studies on the Role of Major Groups in Sustainable Oceans and Seas" (1999), a United Nations report on business and the environment.

RAISING AWARENESS AMONG WHALE WATCHERS

The Saguenay-St. Lawrence Marine Park is making an important parallel effort to educate whale watchers, including individuals expressing an interest in whale watching, clients booking whale watching cruises, and people heading out in their own pleasure crafts.

The marine park's new "Observers

Several marine mammals in the St. Lawrence River – harbour porpoise, blue whale, humpback whale, fin whale, beluga whale – are species at risk according to the Committee on the Status of Endangered Wildlife in Canada (COSEWIC).

The belugas, the region's only year-round whale residents, are the only species that carries the critical 'endangered' status. This means their small population is at risk of extinction, and disturbance by human activities poses a serious threat to its future.

To help the population recover, belugas are not sought out for whale watching at sea. Any vessel encountering a beluga must remain at least 400 metres from the animal. It must reduce its speed and immediately leave the vicinity.

Visitors to the Saguenay-St. Lawrence Marine Park have the opportunity to observe belugas from a few land-based sites without risk of disturbance to the whales.

Awareness Guide" is available at park interpretation centres and land-based whale watching sites; at regional tourism offices, marinas and other attractions; and at ticket counters of local whale watching companies. Copies of the guide are also mailed with visitor information packages and distributed through the Montréal Biosphere. It has become a very popular and useful education tool.

"We wanted something that would help inform consumers," says Nadia Ménard, a Parks Canada biologist working at the marine park. "Something to raise their awareness of conservation roles and responsibilities."

The guide tells readers that the Saguenay-St. Lawrence Marine Park is a special place where marine ecosystems are protected. It makes the point that it is a 'privilege' for visitors to enter the home of the whales – not a right, as Ménard points out.

She adds, "If you go to somebody's house, you act with respect. That applies to the habitat of the whales too. We have to remember that we're the visitors, not the whales."

A whale-watching trip, she stresses, is a passport to the home of the whales, where they carry out important functions such as feeding, communicating and caring for young. These are easygoing activities that



Parks Canada

NOT ALL QUIET ON THE WESTERN FRONT

Whale watching is a popular activity within the boundaries of Pacific Rim National Park Reserve on Vancouver Island, British Columbia.

It's no surprise. Over 20,000 grey whales pass through the area on their annual migration from the Baja Peninsula to the Bering Sea. Both transient and resident pods of orcas feed along the coast. Humpback whales are starting to move closer to shore.

With so much whale activity, it's almost inevitable that the occasional whale watching vessel will approach the whales too closely, and disturb aquatic habitat and migrating shorebirds.

The park has responded by convening park wardens and representatives from local whale watching companies to establish guidelines for the industry. The draft guidelines include protocols and details regarding observation distances and acceptable behaviour. They also describe the wildlife species that could be affected by guided tours – from whale watching to bear and bird watching.

When Pacific Rim is eventually legislated as a full-fledged national park, the guidelines will come in handy for licensing operators bringing clients to the park.

don't necessarily match the picture of adventure and visual excitement created through marketing. High expectations of whales in the wild can lead to disappointment, and can occasionally drive clients to pressure boat captains into getting too close to the whales.

GET INTO "SYNCH" WITH NATURE

"A whale watching cruise is not fast-paced adventure," says Ménard. "It's an insight into the daily life of these peaceful, majestic animals. It's an experience of discovery that should be done at the pace of the whales."

Being able to observe a whale's natural behaviour at sea is a tremendous privilege, she emphasizes. Being surrounded by a unique marine environment is a fantastic educational opportunity. Just being out on the water is an experience.

As the brochure suggests, visitors to the Saguenay-St. Lawrence area can observe seals, seabirds, and spectacular land and seascapes during whale watching cruises. They can also watch whales from sites along the coast. And they can explore the region's rich human history, plus many other land-based attractions and interpretation centres.

It's a question of awareness – of the pressures faced by the whales, of respectful and responsible whale watching products, and of complementary activities. It can result in informed and ethical choices, more holistic and educational experiences for visitors, more even distribution of visitation throughout the region, and, ultimately, a healthier future for the whales.

418 235-470

SPA PRODUCTS ADD TO TOURISM...

continued from page 15

CANADIAN MUD INTERNATIONALLY RECOGNIZED

Glacial muds from the west coast of British Columbia, and the Canadian Arctic, are presently being marketed internationally and are competing with the best of the healing muds coming from Eastern Europe. Before the Canadian muds went international, the world regarded the best muds as coming from Europe, but this is not the case anymore! "The healing power of the special Canadian muds, when applied to the skin, provides the spa goer with some of the most powerful detoxification available," states Sah Naji Kwe owner Joyce Rabesca. The *Sah Naji Kwe Wilderness Spa* and Meeting Centre, located in the Northwest Territories, provides spa guests with the amazing healing muds experience right from the muddy shores of Great Slave Lake. The name Sah Naji Kwe translates into the "Bear Healing Rock" in the language and culture of the Dogrib Dene First Nations.

NATURAL PLANTS YIELD SPECIAL OILS

Another innovative Canadian spa product line, being marketed nationally and internationally, is from the British Columbia company Canadian Natural Oils. Their goal is to extract valuable nutrients from wild and natural organically grown plants found in the vast Cariboo region of British Columbia.

For example, Canadian Natural Oils Wild Rosehip Oil provides a food source for the skin that is regarded world wide as one of the most powerful skin regenerative plant-oils available. The Vitamin C and Vitamin A rich rose hips are hand picked in the wild, organically processed, then blended with hand picked wild camomile and imported cold-pressed Italian grape seed oil. The whole process is solvent free.

Juanita Corbett, President of Canadian Natural Oils states, "science has shown that natural rose hip oil has very positive effect on the ability of the skin to regenerate, and we have developed a process that allows us to use this healing plant in many spa treatments. Since we have brought our products to the market the international reaction has been very encouraging. From Singapore, to the US, and across Canada our oils are being enthusiastically sold, featured, and integrated into spa treatments and operations."

Similarly, The Hills Health Ranch in 100 Mile House British Columbia features their own massage oils and antiseptic sprays consisting of unique secretive Canadian blends of essential oils and creams. These products are now being marketed across North America.

SPA PRODUCTS ARE BIG BUSINESS

In conclusion, the supply of some of the world's best spa products are now coming from Canada. These unique Canadian business opportunities are being found by innovative Canadians who have integrated their knowledge of the healing properties of Canada's natural resources with the rapidly expanding spa-goer demands. The result is that Canada is establishing itself more and more as a product leader because of the purity and quality of the products being sold. The effect is very dynamic, and has a three-fold effect on our country: first, to create more Canadian jobs, second, to keep Canadian spas buying from Canadian suppliers, and third, to provide a new export product line for the country!

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Neptune's Gift Box - Pinnacle Minerals, SK

CTC REPORT

Tall Ships Chicago event markets 4-seasons of Canada

One of the major elements of the U.S. Media Relations & Promotions program is identifying existing events in the U.S. that can be used to direct some focus to Canada. The Tall Ships

event on the Labour Day weekend gave the CTC an opportunity to work with Canadian Consulate General in Chicago to create a major Canada promotion for the consumers who would visit Navy Pier Aug. 31 to Sept. 4.

Of the Tall Ships that began their summer 2000 journey in Halifax, seven Tall Ships finished their journey in Chicago, and five of the Tall Ships were Canadian (three from



Ontario and two from Nova Scotia). In addition to setting up two tourism booths on Navy Pier where CTC and partners' tourism literature was distributed, Ship Captains distributed Canadian tourism literature aboard their respective Tall Ships. Entertainers from across Canada were featured as part of the Canada promotion.

Attendance was estimated at 800,000. Radio promotions were coordinated by CTC with Canada partners for one week prior to Tall Ships event. Exposure included the Chicago and vicinity market plus seven other markets – a total audience of 1.1 million. Partners in this venture included Ontario, Toronto, Québec, Montréal, Nova Scotia and Newfoundland & Labrador, as well as the Canadian Consulate General, Department of Foreign Affairs, Canadian Heritage, and the Chicago-Toronto Sister City Program.

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Australian campaign receives accolade

Savage Communications, the CTC's public relations agency in Australia, has won a prestigious award at the Public Relations Institute of Australia's Golden Target State Awards for Excellence held in Sydney on 12 October 2000.

The company won a highly commended award in the Comprehensive Communication Program category for their 1999/2000 campaign to increase the number of Australians travelling to Canada, conducted on behalf of the Canadian Tourism Commission (Australia).

The CTC's campaign was the only tourism communications program among five finalists commended in the 'comprehensive' category, including the Australian federal government's Y2K communication program which won the top award.

OBJECTIVE MET

Savage Communications' overall objective for the CTC was to achieve a 4 per cent increase in the number

of Australians travelling to Canada. In 1999/2000, Australian visitors to Canada increased by 4.5 per cent or an additional 6,600 travellers over the previous year. The CTC's media relations efforts generated CDN\$2.9 million of editorial coverage as measured by equivalent advertising dollars, a 140 per cent increase over the previous year.

"We're encouraged by the ongoing recognition of our public relations campaign and overall marketing activities in Australia," said John Burchell, Director of Asia Pacific Programs and Partnerships. "The Australian travel trade is responding to our efforts and demonstrating a growing interest in promoting new Canadian travel products and destinations."

Canada was named the 1999 Destination of the Year at Australia's National Travel Industry Awards.

Marie-Paule Dupont (CTC)
613 954-3966

Snowmobile tourism in Canada under review

The Canadian Tourism Commission, in conjunction with the Canadian Council of Snowmobile Organizations (CCSO) and the tourism ministries of the Yukon, British Columbia, Alberta, Manitoba, Ontario and Newfoundland/Labrador will undertake a comprehensive study on snowmobile tourism in Canada. The study aims to provide a

true picture of the state of snowmobile tourism in Canada. Areas for study include development and marketing issues, market research on snowmobilers, economic impacts and regulations/policy affecting snowmobile tourism. The final report is expected to become a national framework for snowmobile tourism with special status reports for each participating province and recommendations on a course of action on development and marketing issues/opportunities.

"The CCSO welcomes this investment in snowmobile tourism research," says Michel Garneau, CCSO

FRESH TRACKS: the trail to winter tourism success

Mark your calendars now, plan to be in Niagara Falls on January 4-6, 2001. Get the inside story on successful winter tourism operators and the "how to" of developing and marketing diversified and unique winter product offerings. Discuss winter tourism operations issues and making the most of media relations programs. Hear views on Canada's opportunities for the development of winter tourism from key travel influencers inside and outside of Canada.

The CTC in conjunction with the Ontario Tourism Marketing Partnership (OTMP) are currently in the planning stages of the next National Winter Tourism Forum. The conference will feature key note speakers, interactive workshops and concurrent sessions on a wide variety of winter

WIN with WINTER Canada



CONTEST OPPORTUNITY

The Win With Winter in Canada contest is a Canadian Tourism Commission initiative that provides an opportunity for individual tourism operators, communities, regions and sector specific associations to develop new winter tourism product.

The purpose of the contest is to provide an added element of incentive to the industry in order to develop exciting and "market-ready" winter product to Canada's inventory. Not only will participants win by developing new product and grow revenue in the winter months but they also will have an opportunity to win free international promotional exposure of their specific product. An international panel of Tour Operators will judge new product submissions against specific criteria.

Winners and finalists will benefit from a variety of promotional opportunities including inclusion in a new Winter Package Lure Brochure, a quantity of product specific sell sheets and subsidized attendance at international travel shows and marketplaces.

The program is being facilitated through six Regional Champions, as follows:

Atlantic NB, PEI NS, NFLD	Debbie McKinnon Atlantic Canada Opportunities Agency 902-626-2482 or 1-800-871-2596 dmckinn@acoa-apeca.gc.ca	Prairies AB, SASK, MAN	Stephen Pearce Tourism Saskatchewan 306 787-9575 stephen.pearce@sasktourism.com
Québec	Claude Ducharme ATRAQ 450 686-8358 ducharme@atraqsqt.org	The North NU, NWT, YU	John Spicer Yukon Tourism 867 667-5633 John.Spicer@gov.yk.ca
Ontario	Lori Waldbrook Ontario Tourism Marketing Partnership 705 755-2630 lori.waldbrook@edt.gov.on.ca	British Columbia	Maria Greene Tourism British Columbia 604 660-2902 maria.greene@tourism.bc.ca

This program is sponsored in part by the Business Development Bank of Canada. For more information contact your Regional Champion or program administrator Richard Innes by email at richard.innes@sympatico.ca

**DEADLINE FOR ENTRIES
IS NOVEMBER 15, 2000**



BDC
Business Development Bank of Canada

General Manager. "Our member federations view this study as integral in setting the tone for some exciting and productive developments for organized snowmobiling in Canada."

Michel Garneau (CCSO)
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product development, marketing and research subjects. Delegates will have the opportunity to network with colleagues and Canadian tourism operators in a wide variety of winter products from snow-based products like snowmobiling, dog sledding, skiing, resorts, festivals and outdoor adventure, to non-snow based winter products such as cultural and heritage products, city attractions and events. In addition to the indoor education program conference organizers will provide delegates with the opportunity to experience how Niagara presents itself as a winter travel destination.

The last winter tourism forum in Québec City focused on winter tourism perceptions of Canada, product development and marketing issues, market demand, market

presence, transportation and access issues. The forum presented views of Canadian product suppliers and international winter product buyers designed as an exchange of opinions and information. "The objectives of the 2001 Forum," says CTC Winter Committee Chair, Jean-Guy Pagé, are to create a hands-on learning experience and a knowledge exchange designed to allow participants to take away practical decision-making information."

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Japan Consumer Study 2000: key findings released

by Roger Laplante

Japan's recent economic instability has had a profound impact on the outbound travel market, resulting in a marginal 0.6 per cent increase in outbound departures in 1997 and a 6 per cent decline in departures in 1998. Japanese travel to Canada has been directly affected, with arrivals falling 13 per cent in 1997 and a further 14 per cent in 1998. In March of this year, a telephone survey was conducted with Japanese long-haul pleasure travellers (18 years of age or older) from Tokyo, Osaka and Nagoya with the objective of ascertaining the impact of the current economic difficulties in Japan on consumers' purchasing travel patterns.

The research was conducted by PricewaterhouseCoopers Ottawa in conjunction with Japan Research Consultants (JRC) and PricewaterhouseCoopers Tokyo. This study was sponsored by the Canadian Tourism Commission (CTC) and a partnership group including provincial representatives in the Atlantic Canada Tourism Partnership, Ontario, Alberta and British Columbia, Air Canada, Canadian Airlines, C.P. Hotels and Resorts and JTB International (Canada).

IMPACT OF THE JAPANESE ECONOMY

The results of the study show that there have been many striking changes in the Japanese market since 1995. Many of these changes are closely tied to the economic weakness in Japan, the deterioration of the yen and the poor consumer confidence that has swept the country.

- The incidence rate for long-haul pleasure travel, which increased steadily between 1986 and 1995, is about the same today as it was in 1995 (25.5% of Japanese adults have taken a long-haul trip in the past three years or plan to take one in the next year). This is a clear sign that the market has stalled.
- Many Japanese are putting off their long-haul travel plans until the economy strengthens. Close to three-quarters of the market (73%) is "waiting until the economy improves to take an overseas holiday," while 63% of travellers are "waiting for the exchange rate to improve" before embarking on overseas vacations. Overall, fewer travellers today feel that "money

spent on overseas travel is money well spent" (only 66%, compared with 72% five years ago).

- Combined business-pleasure travel and company-sponsored vacations have dropped (from 21% of the market to only 8%) as a result of a severe clamp-down on business/incentive travel by Japanese corporations. Consequently, pleasure/vacation trips now account for the lion's share of the market at 71%.
- Today's long-haul travellers are choosing to take shorter trips (63% now take trips of a week or less, compared with only 47% in 1995). This suggests that some travellers are looking for a way to reduce the cost of their trip in response to economic pressures, but do not want to give up on long-haul travel entirely.



- Travellers have become more cautious with their vacation dollar, spending notably less on their long-haul trips than they did in the past. Average trip expenditures have dropped by 23% since 1995, while per person per day expenditures have fallen by 7%.
- Similarly, trips to Canada are much shorter now, with total trip expenditures declining by 26%. Per person per day expenditures dropped by 17%, which suggests that the current consumer caution goes beyond taking shorter trips and travelling with fewer people.
- The booking horizon has lengthened, with long-haul pleasure

travellers now booking their trips further in advance. In today's uncertain economic environment, travellers are less likely to make an impulsive decision to travel than they were in the past, and are also buying earlier to obtain better deals.

- The economic situation has also dramatically shifted the demographics of the long-haul market, with women now accounting for a much greater market share (58%, up from 45% in 1995). This stems largely from the cut-back in combined business-pleasure and incentive travel by Japanese businessmen.
- Seniors in particular have remained less affected by the economy, perhaps because many of them are retired and financially self-sufficient. Seniors are less likely to have put their overseas travel plans on hold, and in fact, this segment has more than doubled in size since 1995.
- Young and single, Japan's Office Ladies are among those hit hardest by the economy, and the majority of travellers in this group are waiting until things improve to resume overseas travel. However, their interest in leisure travel remains extremely strong, so there is likely to be much pent-up demand here.

JAPANESE TRAVEL TO CANADA

- This study estimates the size of the potential Japanese long-haul pleasure travel market (to all destinations) at 26.1 million travellers. Approximately 61% of this market is interested in visiting Canada in the next five years, which translates into 15.9 million potential Japanese travellers to Canada.
- However, Canada faces numerous barriers to fulfilling this potential in that most Japanese travellers are unaware of what Canada has to offer and of specific things to do and see there. Canada's image in Japan is as a wondrous place to see nature, but it is known for little else.
- Relative to the market as a whole, travel agents and travel guides tend to play a greater role in consumer decision-making and planning for travel to Canada. These will be important channels that marketers can use to reach Japanese travellers and enhance their knowledge about the country.
- Despite the overall trend towards the use of skeleton packages for destinations in Asia and the U.S., the market still favours very comprehensive, all-inclusive type packages for Canada. This may be due to unfamiliarity with Canada, but is probably also due to a lack of available product.
- Future interest in Canada is focussed on the Toronto-Niagara Falls region and westward. Although Japanese travellers are beginning to show the inclination to move beyond Ontario to destinations like Montréal and Atlantic Canada, these destinations are not well known in Japan from a tourism point of view and require better awareness marketing and branding.
- Nature is unquestionably the main draw for Japanese visitors, with additional interest in Canada's touring and city products. However, other key products such as outdoors, winter, culture/history or resort products stir little interest in this market and may require considerable awareness building to boost their popularity.
- Canada also suffers from poor price-value perceptions in Japan. It is perceived as being a very expensive, high-end destination that offers less tourism value to consumers than some of its competitors do. These perceptions will need to be mitigated for Canada to improve its position in the marketplace, with price issues being particularly immediate.
- The Middle-Aged (45 to 59) segment offers the best future potential for Canada among the five segments examined in the study in terms of potential volumes

and revenues. This segment exhibits a high level of interest in visiting Canada, and is more likely than other groups to perceive Canada as offering good value for a reasonable price.

CONCLUSIONS

- The Japanese interest in long-haul pleasure travel remains strong, with considerable pent-up demand in the marketplace. This suggests that the market will resume its upward track as the economy improves. There is a core of people, typically older and better off financially, whose overseas travel plans have been less affected by Japan's economic woes, and who will likely lead the way as the market rebounds.
- The potential market to Canada is 15.9 million Japanese pleasure travellers (based on the fact that 61% of the long-haul market is very or somewhat interested in visiting Canada in the next five years). But to achieve this potential, Canada will need to enhance market awareness, aggressively promote its products, and make potential travellers more familiar with specific things to see and do there.
- Improving price perceptions will be critical for Canada to boost its share of the Japanese market, since the recent economic difficulties have left the market extremely cautious and very price-sensitive. This new cost-consciousness is marked by declining trip expenditures and trip lengths, less money being spent on shopping, and a greater tendency among travellers to seek out the best deal (e.g., through discount air ticket suppliers).

- Canada also needs to boost its perceived "value" as a tourism destination in Japan. It tends to be thought of as a safe, clean and nice country to live in, but its tourism attributes are not well known. Canada needs to develop a better branding strategy in Japan – one that goes beyond "grand nature." Its culture product might be a good place to start since seeing different cultures has evolved to become highly important to Japanese travellers.
- The over-riding desire in this market for safety when travelling immediately gives Canada a strong advantage in marketing any product, whether it be nature, culture or anything else, in that all activities can be done in a safe and clean environment. This is a distinctive part of the Canada brand.
- The Middle-Aged segment offers the best potential for Canada, with high interest levels and relatively good price-value perceptions of the destination. This is also a potentially lucrative segment for Canada to target, representing both high volumes and high expenditures. Seniors and Full Moon Couples also have high interest and good value perceptions, but Canada will need to address poorer price perceptions, particularly among Seniors, to attract these segments. All three of these groups tend to be package users, so Canada should examine its package offerings to ensure they are in line with what these segments want (e.g., all-inclusives, high quality accommodation, etc.).

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Measuring success in new ways: Winterlude 2000

Winterlude 2000, a winter festival held in Ottawa, was evaluated this year through a partnership of the National Capital Commission, Ontario Tourism, the Region of Ottawa Carleton, the City of Hull, and the Canadian Tourism Commission.

The research, utilizing a "multiple lines of evidence" approach, was undertaken by Ekos Research Associates in collaboration with the Conference Board of Canada (Canadian Tourism Research Institute). According to Ekos' Executive Summary of the report (available in full at the Tourism Reference and Documentation Centre of the CTC), the methodological approach was re-vamped to increase the accuracy of the results by allowing festival attendees to report on their experience of the event at the end of the fes-

tival, rather than during the events. National Capital Region households were also surveyed to assess the number of households hosting out-of-town visitors during the event, as part of the event's impact measurement.

Generally, it was found that attendance was high, as was visitor satisfaction and spending. The economic impact study revealed that Winterlude 2000 generated more than \$70 million in actual spending, most of which was in the National Capital Region itself; this spending generates a total of \$143 million economic activity and the creation of more than 2000 full-year-equivalent jobs in Ontario and Québec.

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Canadian spas finding a place in international markets

by Brenda Watts

With growing interest in pristine natural settings, Canada is increasing its popularity as an international spa vacationing destination. The serene unspoiled locations of Canada's spa resorts are a value-added benefit because the spa-goer may be seeking tranquillity and escape. Canadian spa resorts also offer unlimited access to year round fitness activities in the adventurous outdoor landscapes therefore promoting the fitness element of the spa philosophy.

In *The American Spa-Goer Survey* (1991), prepared for the International SPA Association (ISPA) by Yesawich, Pepperdine & Brown, one of the conclusions state "The majority of resort/cruise spa-goers rate nature trails and hiking and outdoor adventure as extremely/very desirable."



*Hot Springs Waterfall -
Fairmont Hot Springs Resort, BC*

PRISTINE ENVIRONMENT COUNTS

Canada's sincere and authentic hospitality, the focus on health, nutrition and fitness and, the exporting of environmentally pure spa products enhance the market appeal for the international as well as American consumers. Anna Polluck reports in the *Health Tourism, An opportunity Assessment for Canada's West* (1996), "The German market should not be ignored as having long-term potential. Canada can build on its popularity with the Germans by featuring wellness (sport, fitness, and health) in a pristine, unspoiled, clean and fresh environment."

Gord Tareta of the Solace Spa at Banff Springs Hotel comments "The benefit of bringing both guests and employees from other parts of

the world is that we are able to capitalize on a trend of incorporating a European spa approach to a North American luxury philosophy."

ISPA's International Committee Chair Pat Corbett, from The Hills Health Ranch in BC, concludes "The Canadian spa experience is extremely valuable and desirable because of the outdoor adventure possibilities and spectacular landscapes. I have visited spa properties across Canada, in the US, Europe and Asia Pacific, and have come to the conclusion that the natural tourist assets that exist across our country place very well against all spa industry competition anywhere in the world." Corbett concludes, "the key to our future is to market ourselves successfully while delivering a high quality spa experience."

Overview of potential French market for winter

According to the *France Strategic Segmentation Study* (CTC-PriceWaterhouseCoopers, 1999) French travellers who like to take long-haul holidays in the winter, so they can enjoy winter sports or winter scenery, have a number of distinctive characteristics, as follows:

- They are more likely to be white-collar workers and to earn mid-range incomes.
- They are more likely to have access to technology at home and to have used Minitel to obtain information on holiday travel.
- In terms of general travel motivations, they are more likely to choose their destinations on the basis of environmental quality and cleanliness.
- They are more likely to seek destinations that offer alpine skiing, snowmobiling, other winter sports and mountainous areas. They also show more interest in sports in general.
- Minimizing travel costs and the availability of package trips are two important factors for this group.
- These travellers generally seem to enjoy having fun, with theme parks, casinos and spectator sports more popular among this group.

CANADA TIES U.S. AS A FUTURE DESTINATION

French travellers who enjoy winter scenery and winter sports represent 17 per cent of the total market (total potential French long-haul travellers is 9.1 million). Given their interests, this is an obvious market segment for Canada to pursue. Not only does Canada offer first class winter sports, but it also has other products that this group enjoys, such as casinos

and spectators sports (e.g. hockey, ski competitions).

Moreover this group exhibits the highest interest in visiting Canada (59% in the next three years), and Canada is tied with the U.S. as the top future travel destination for this group. However, expense is a major barrier for these travellers, and Canada will have to combat perceptions of being an expensive place to visit. This will be all the more crucial given the strong competition from short-haul ski resorts and winter destinations in Europe. Package deals would be a particularly good way to entice this group to visit Canada, but the inherent value would have to be obvious to get these travellers to bite. With respect to image building, Canada should depict itself as a fun and exciting place to appeal to this group's motivations for taking a holiday.

In addition to ski and snowmobiling holidays, this group might be targeted for other winter sports such as cross-country skiing, snow-shoeing, skating, winter climbing, etc. This group is also more likely to be interested in mountain or country resort trips (23% vs. only 12% of the market as a whole). This suggests that there are good opportunities for Canada to market a winter trip to Banff, Whistler or Mt. Tremblant to non-skiers who simply want to enjoy nice scenery, wildlife, winter walks, good food, etc. This might be particularly appropriate for the older members of this segment (more than a third are 50 or older). Canada might also be successful with packages to its major winter festivals (e.g., Winterlude, Carnaval, Festival du Voyageur), perhaps combined with skiing or other winter sports.

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A MONTHLY GUIDE TO TRAVEL & TOURISM DATA

Tourism Activity	Reference Period	Quantity	% Change from previous year
TOURISTS TO CANADA			
From the U.S.	January-July 2000	8,549,633	-0.2
By Auto	January-July 2000	5,375,715	-0.9
By Non-Auto	January-July 2000	3,173,918	1.1
From Overseas - Total	January-July 2000	2,488,339	7.5
United Kingdom	January-July 2000	487,256	9.2
Japan	January-July 2000	255,972	-2.0
France	January-July 2000	215,952	2.6
Germany	January-July 2000	209,270	0.9
Hong Kong	January-July 2000	88,460	-0.1
Australia	January-July 2000	99,009	13.0
Taiwan	January-July 2000	99,414	10.5
OUTBOUND CANADIAN TOURISTS			
To the U.S.	January-July 2000	8,642,886	7.2
By Auto	January-July 2000	4,633,739	4.9
By Non-Auto	January-July 2000	4,009,147	9.8
To Overseas - Total	January-July 2000	2,803,804	3.6
EMPLOYMENT IN TOURISM			
Total Activities	Second Quarter, 2000	554,300	4.4
Accommodation	Second Quarter, 2000	153,000	5.6
Food and Beverage	Second Quarter, 2000	149,500	2.9
Transportation	Second Quarter, 2000	99,800	4.1
SELECTED ECONOMIC INDICATORS			
Personal Disposable Income	Second Quarter, 2000	\$20,345	1.8
GDP at market prices (current, \$B)	Second Quarter, 2000	1,029.4	1.4
GDP at market prices (1992, \$B)	Second Quarter, 2000	918.7	1.1
CPI (1992=100)	August 2000	113.9	2.5
EXCHANGE RATES (in Cdn\$)			
American dollar	September 2000	1.4862	0.6
British pound	September 2000	2.1306	-11.2
Japanese yen	September 2000	0.0139	0.7
French franc	September 2000	0.1970	-16.7
German mark	September 2000	0.6608	-16.7
EURO	September 2000	1.2925	-16.7

Note: All tourist estimates deal with trips of one or more nights. All data on this table is not seasonally adjusted. Source: Statistics Canada and the Bank of Canada.

- ERRATA -

In the last issue of *Communiqué* an error occurred in the article *Highlights of travel forecasts*. In this article, the table "Forecast of overnight person-trips from the United States to Canada" the same volume was repeated for "United States total" and "United States non business". It should have been the following:

	2000	2001	2002	2003	2004
Unites States	13,123	13,464	13,707	13,954	14,177
Non Business	(2.3%)	(2.6%)	(1.8%)	(1.8%)	(1.6%)

You can find a complete version of the revised article in the October *Communiqué* on our website: www.canadatourism.com

TOURISM SPENDING SLOWS...

continued from page 1

Domestic spending on tourism is estimated to have reached \$8.7 billion during the second quarter of 2000, up 6.9 per cent or \$560 million from the same quarter last year, representing two-thirds of total tourism expenditures in Canada.

EMPLOYMENT DOWN

On a seasonally adjusted basis, tourism employment actually declined by 0.7 per cent (at annual rates) from the previous quarter of this year, mostly as a result of negative rates in transportation (-6.3%). As with tourism expenditures, however, the non-seasonally adjusted total tourism employment numbers continue to show an increase of 4.4 per cent in the second quarter of 2,000 over the same period last year. The number of persons employed in tourism related

activities reached 554,300, with the strongest gains in water transportation, recreation and entertainment, and accommodation.

"These seasonality and inflation adjusted aggregate numbers are worth noting", said Scott Meis, Director of Research at the Canadian Tourism Commission (CTC). Furthermore, some numbers for selected commodities such as motels and other types of accommodation are actually declining or are either flat (with less than 1 per cent growth), such as the case of hotels, and vehicle repairs. "The combination suggests a more mixed business environment for the industry, compared with the much stronger and more consistent figures experienced for the previous five years", concluded Scott Meis.

A CTC/Statistics Canada initiative, the NTI measure tourism and its socio-economic significance for

TOURISM SPENDING IN CANADA BY KEY COMMODITIES SECOND QUARTER, 2000

CATEGORIES	Total Tourism Demand		Domestic Tourism Demand		Tourism Exports	
	\$million	% change over previous year	\$million	% change over previous year	\$million	% change over previous year
COMMODITIES						
Passenger air transport	3,202	10.2	2,541	9.9	661	11.5
Passenger rail transport	65	10.2	43	10.3	22	10.0
Interurban bus transport	171	4.3	114	4.6	57	3.6
Vehicle rental	269	6.3	97	1.0	172	9.6
Total transportation	5,337	10.9	4,198	10.8	1,139	11.2
Accommodation	1,923	6.7	904	4.3	1,019	9.0
Food & beverage services	2,118	4.6	1,150	2.8	968	6.8
Recreation & entertainment	793	6.2	431	5.4	362	7.1
Travel agencies services	451	4.6	427	4.7	24	4.3
Convention fees	26	4.0	8	-11.1	18	12.5
Total tourism commodities*	10,648	8.2	7,118	7.8	3,530	8.9
Total tourism expenditures**	12,983	7.4	8,664	6.9	4,319	8.4

Source: National Tourism Indicators, Statistics Canada. All data is not seasonally adjusted. *Total Tourism Commodities includes total transportation, accommodation, food & beverage services, and other tourism commodities (i.e. recreation & entertainment, travel agency services and convention fees).

**Total Tourism Expenditures includes tourism spending on all Canadian produced goods and services in both tourism and non-tourism commodities

Canada. Canada is the first country in the world to develop and publish such indicators.

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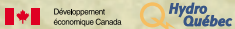
69, avenue Morel
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PEOPLE

Tourism has new federal Minister

Prime Minister Chrétien has appointed former Newfoundland Premier **Brian Tobin** as Minister of Industry Canada, to replace The Hon. John Manley who has taken over the post of Minister of Foreign Affairs and International Trade. Mr. Tobin, as Industry Minister, becomes the Minister responsible for the Canadian Tourism Commission.

"The CTC has had a long-term

and productive working relationship with Mr. Manley and I appreciate his commitment to the tourism industry over the past several years," said CTC President Jim Watson. "I am looking forward to working with Mr. Tobin, a man who also has an excellent knowledge of tourism and its benefits to the economy and society as a whole."

Communiqué will have more on tourism's new Minister in upcoming issues.

Winter festivals on the web

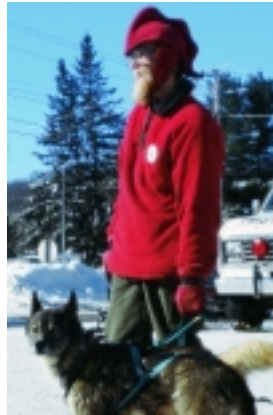
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SPECIAL PEOPLE MAKE PRODUCTS SPECIAL

Communiqué began to publish this special monthly feature in September; special people, indeed, do operate special products all over Canada that contribute in special ways to Canada's unique blend of tourism experiences. We invite our readers to submit their special story to *Communiqué*; tell us who you are, where you operate, where your markets are, how long you have been in business (3 years minimum), and what makes your product distinctly Canadian

Send to:
 gaudreault.ghislain@ic.gc.ca

THIS MONTH'S FEATURE...



Sue Moss and Doug Bruce operate a business called **Raven's Watch Dog Sledding and Eco Tours** from Sundridge, just outside of Algonquin Park in Ontario. The tours are targeted at novice dog sledders, and combine the thrill of first-time dog sledding with an appreciation for nature. Trip include back-woods comfort in a wilderness lodge after an exhilarating day on the trail.

2001 will be the eight year that Raven's Watch has been offering these tours, largely to clientele from the U.S. and Canada, at the rate of about 250 customers per winter. They are receiving enquiries from developing markets in England and Australia.

Sue and Doug explain that dog sledding is especially Canadian, since it is one of Canada's original means of winter transportation. Their tours help people "live their dream of mushing a team of huskies" through the scenic north of Ontario.

For information
 www.ravenswatch.on.ca
 1 705 386-2524

search is www.festivalseeker.com, the definitive Web site for Canadian festivals and events. Created four years ago under the auspices of the Canadian Tourism Commission's Product Club program, Festivalseeker is managed by the Ottawa Festival Network, an association of festivals in the Ottawa area, and Business Interactive, a network solution provider.

For a festival-loving nation, Festivalseeker serves two important purposes. For the festivals, it provides free advertising and allows direct links to their sites. Listed events also get added exposure through CTC's

www.travelcanada.ca site. As well, the database will soon also be part of the Leisure Network site (via the Weather Network). Through these relationships, festivalseeker.com is fast becoming the reference point for events in Canada.

For more information, about Festivalseeker, please contact the site administrator and Festival Network general manager
 Leslie Manion
 613 233-1085
 info@festivalseeker.com

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