

# TOURISM

CANADA'S TOURISM MONTHLY

March 2003

**Flight plan for tourism**

Bus companies face soaring insurance cost

Highways: trails to discovery



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# IN OUR COMING ISSUES

In **April**, spring is making its presence felt across the country. Spring is thought of as a shoulder season by many tourism operators; some attractions aren't even open. Tourism businesses are looking for - and finding - ways to increase revenues at this time of year. We will have a feature about our national, provincial and territorial capital cities. **At Issue** takes a look at Canada's highway infrastructure.

In **May**, the traditional tourism season is getting underway. Sport fishing is an incredibly popular pastime, and it's not just trophy anglers, but Granddad and the kids too who will travel long distances to visit new lakeside resorts or campgrounds. Where to stay in Canada is never a challenge, with so many soft pillows in so many rooms ranging from cottage inns to 5-star hotels. **At Issue** will look at the Kyoto Accord, and how Canada's commitment will affect the industry. We'll also take a peak at how the tourism industry is adjusting to climate change itself.

Month	Deadline	Features
June 2003	April 25, 2003	Canadian niche products Product clubs, seven years later
July/August 2003	May 23, 2003	Experience SUMMER in Canada Exploring a new market: youth
September 2003	July 25, 2003	CHOICES: eating well in Canada Canada, a stage for learning
October 2003	August 29, 2003	Experience AUTUMN in Canada Discovering Canada through its museums
November 2003	September 26, 2003	CHOICES: new things to do in Canada Revamping Canada's attractions
December 2003	October 24, 2003	Experience WINTER in Canada Canada, a multicultural society

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On the cover: Train travel is back on tracks across Canada. Photo: courtesy of VIA Rail Canada.

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- International Travel Forecast 2002 - Third Quartet Update (C5088E)
- CTC Tourism Intelligence Bulletin - Issue 11 - Full Report (C50148E)
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These publications are available through [distribution@ctc-cct.ca](mailto:distribution@ctc-cct.ca) or at [www.canadatourism.com](http://www.canadatourism.com).

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

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## Editorial

Of engineers and artists by Peter Kingsmill

Taking a holiday trip by car with my parents was a memorable event. Although it was not something that happened all that frequently, by and large it was a happy time. My parents seldom argued at any length, but their distinct personalities most certainly affected the way our motor trips were conducted.

Mother was an artist. Every vista along the way, every quaint building, every colourful activity or event, was an occasion of wonder and... an occasion to stop. Father, on the other hand, was an engineer. Highways were carefully designed, constructed, surfaced and signed for the sole purpose of moving rubber-tired vehicles from origin to destination in a safe and efficient manner. It is as though my mother and father were the Yin and Yang of travel and tourism; it does not take a great deal of imagination to speculate that our family road trips were punctuated by some interesting discussions!

In any household, a combination of different perspectives, mutual need, respect, and intelligent debate yield a creative tension that makes the whole much greater than the sum of its parts. In the tourism household, this is a matter of business survival; transportation planners, administrators,

and businesses must involve the tourism industry in the process, remembering all the while that this industry contributes to business and tax revenue as well as infrastructure loading and expense. The magnitude of this concern can be sensed from an article we have published elsewhere in this issue, about a British Columbia survey of tourism businesses that points to crumbling transportation infrastructure as the number one issue holding back growth.

Whether they be building roads, bridges and ferries, or aircraft and airports, the need to repair, rebuild, and enhance our travel infrastructure will certainly engage the nation's engineers for years to come. Figuratively speaking, it will be up to us in the tourism industry to bring the artists to the table! We need to ensure that travelling to and within Canada is a positive part of the overall tourism experience.

There is an old saying: "Getting there is half the fun!" Let us ensure that, for our tourist clients, this is always so! 🍁

Peter Kingsmill, Editor-in-Chief



Intrawest's Daniel Owen Jarvis has been appointed to the Board of Directors of the Canadian Tourism Commission for a three year term, representing the Attractions and Entertainment sector. Jarvis is executive vice-president and chief financial officer of Intrawest, based in Vancouver.



Beginning April 1, the Air Traveller's Security Charge is being reduced on domestic flights from \$24 per round trip to \$14 per round trip. The announcement came as part of the 2003/4 federal budget; complete budget information can be found at [www.fin.gc.ca](http://www.fin.gc.ca)



Data on foreign travel for the last quarter of 2002 show Canada has been slowly moving towards recovery. However the overall balance of payments figures for the year demonstrate the continuing impact of the September 11, 2001 event and the associated economic malaise. For more information, [www.statcan.ca](http://www.statcan.ca) or [www.canadatourism.com](http://www.canadatourism.com).



Transport Minister David Collenette has released his vision for Canada's transportation system. The policy framework, *Straight Ahead - A vision for transportation in Canada*, covers long-term transportation issues in Canada, ranging from airline and railway competition issues to critical infrastructure needs, environmental pressures and safety and security imperatives. [www.tc.gc.ca](http://www.tc.gc.ca).

## Letters to the Editor

I have been receiving your magazine for several years and following, in an indirect way, the work of the Canadian Tourism Commission. I am stimulated to write because of a thoroughly negative aspect of tourism in Canada—one that, in my view, requires priority attention.

I refer to the deplorable state of amenities along highway 401, the

most heavily travelled tourist route in Canada. When one compares the rest stops and service centres in most Western European countries to the pathetic facilities along the 401, one can only cringe. In France, Germany, Italy and other such countries, these centres are used as promotional facilities, with food, wine and other produce of the country and region given pride of place. Instead, the 401 offers only fast-food shops and services.

As a Canadian, I am embarrassed every time I have to stop at these facilities, which I try to do as little as possible. Rather than enhancing the attractiveness of Canada as a tourist destination, these 401 stops positively detract from it. 🍁

Lawrence L. Herman  
Toronto, Ontario

We encourage our readers to submit letters on any topic or issue covered in *TOURISM* magazine. Please include your full name, address, and telephone number. The editorial board reserves the right to select and edit letters for publication.



## At Issue

by Randy Williams

# Flight plan for tourism

Last time in this column, I wrote about the negative effect the Air Travellers Security Charge (ATSC) and other taxes and fees are having on Canada's travel and tourism industry. Now I want to look at some of the broader issues that continue to challenge air travel and the businesses that depend on this sector's health.

Through the Tourism Industry Association of Canada (TIAC), our industry has been applying its expertise to the successful resolution of these challenges. Among other initiatives, we formed a coalition with the Air Transport Association of Canada and the Canadian Airports Council, which recently released a report (*Flight Plan for Tourism*) exploring a range of air travel issues and recommending measures that would have a positive impact on tourism in Canada.

Domestic issues identified in the report include an apparent public policy vacuum when it comes to recognizing the significant role air access plays in community and regional economic development. Such recognition must be developed by all levels of government, which must work with stakeholders in setting air transportation policy. Differences in service levels must also be addressed, as limited access to airports has created challenges for businesses in small and remote communities. Clearly, a mechanism is needed to enable airport authorities to work with communities and negotiate their individual needs with air carriers. Ottawa must also remove regulatory barriers to competition for independent regional carriers.

Looking beyond our borders, we confirmed that international air access to Canada is not only key to the ongoing growth of our aviation industry, it is important in the development and expansion of tourism products across the country and increases our industry's competitiveness. The coalition's report urged Canada to negotiate an "Open Skies Plus" air service agreement with the United States and pursue other options to increase international carriers' access to Canadian markets.

A range of cost pressures on airports, airlines and passengers is hurting competition and airline health, and reducing people's readiness to travel. These include taxes and surcharges such as the ATSC, which we have urged the federal government to abolish. High federal rents at Canada's eight largest airports have cost over \$1 billion so far and continue to rise; Ottawa should cancel the \$23 million rent increase for 2003 and gradually reduce airport rents to fairer levels. Difficulties accessing capital could be ameliorated by raising foreign ownership limits for licensed Canadian carriers.

We also found that the current lack of adequate, up-to-date aviation data is a major concern. Carriers, airport authorities and tourism businesses cannot access the information they need to make planning decisions. A national policy must govern the collection of the necessary data, which TIAC is identifying through consultations with industry stakeholders.

Finally, the coalition also commented on the final report of the Independent Transition Observer on Airline Restructuring, with whose recommendations we largely agreed.

I have only been able to provide a general outline of the issues at stake here, but invite *TOURISM* readers to review the coalition's full report, available at [www.tiac-aitc.ca](http://www.tiac-aitc.ca). 🍁

## Grappling with change

The issue of change within the airline industry was addressed by the Independent Transition Observer on Airline Restructuring. The following are some of the recommendations from the final report, prepared by observer Debra Ward and released in September 2002:

Ward urges the federal government to create a new "made for Canada" policy framework to fully liberalize the competitive marketplace for air service to and within Canada. This could include:



- continuing to pursue a policy of domestic deregulation, dealing with issues arising out of a market-driven environment by other and more effective means.
- acting to ensure that the "all-in" price of airline travel is clearly and transparently communicated to consumers.
- monitoring the proliferation and level of all fees, including the Air Travellers Security Charge to assess the cumulative impact of these charges on airline demand, especially short-haul and low-fare travel, and taking corrective action if necessary.
- separating economic development policy from transportation policy.
- expanding the use of existing economic development tools and funding mechanisms to enshrine air access as part of these programs.

According to Transport Canada, Debra Ward's recommendations are being considered as part of the department's *Transportation Blueprint initiative*. The Blueprint will lay out a federal strategy to respond to the major challenges facing Canada's transportation sector over the next decade and beyond. It has involved consultation with Canadians from across the country with a variety of transportation interests. The release of the Blueprint is expected shortly. 🍁

**What direction is Canada's tourism industry heading?  
We'll draw you a map.**

The Tourism Industry Association of Canada is the national voice of the tourism sector and the source of information and development for tourism professionals from coast to coast. If you and your business are part of this vital and thriving industry, join us, let your voice be heard, and benefit from our innovative member programs and events.

**Visit online for more information at [www.tiac-aitc.ca](http://www.tiac-aitc.ca)**



## Growing the marketing model

*TOURISM will be carrying a series of articles about how provincial and territorial tourism marketing organizations in Canada are structured. Over the years, there have been a few challenges, and many success stories; most have been the product of careful planning and visionary thinking. The first in our series – Saskatchewan – was the first to move away from what was then the government department standard.*

Since 1996, Tourism Saskatchewan has grown to reap the advantages of joint government / industry support, fiscal realignment and new, integrated membership programs. The first provincial tourism authority in Canada to develop a formal government / industry partnership, Tourism Saskatchewan had gone on to become the largest paid-membership based tourism organization in Canada!

What began as the Saskatchewan Tourism Authority with roughly 150 members in 1994 grew to include membership of just over a thousand following the 1996 merger with the Tourism Industry Association of Saskatchewan (TISASK). Today Tourism Saskatchewan boasts a membership of more than 2,100 members, according to Neil

Sawatzky, director of planning at Tourism Saskatchewan. Tourism Saskatchewan has developed an integrated membership program with the provincial tourism regions and participating city DMO's such as Tourism Saskatoon and Tourism Regina. This program allows for integrated buy-in at all three levels. Members joining within city destination marketing organizations also become members of regions and that membership provides membership to Tourism Saskatchewan.

Designated by an Act in the provincial legislature, and operating at arm's length from any government department, Tourism Saskatchewan enjoys the support of a cabinet minister responsible for tourism. Tourism Saskatchewan received just under \$7 million from the provincial budget when it moved away from government in 1994, and funding has remained stable since that time. Industry participation through a variety of partnership opportunities has resulted in annual budgets that have reached over \$12 million since then.

In addition to the two members appointed by the provincial gov-



Photo: Douglas E. Waller, courtesy of Tourism Saskatchewan.  
Saskatchewan, The Land of the Living Skies.

ernment, Tourism Saskatchewan's Board of Directors consists of ten members chosen by designated industry organizations as well as three directors elected at large from the membership, for a total of 15. Integrated membership benefits such as voting privileges and a comprehensive package of benefits relevant to the needs of small businesses have generated significant membership growth.

Aside from the obvious benefits of having all key tourism bodies under one roof, Sawatzky cites readjusting the fiscal year to be in better sync with the tourism marketing cycle, and a greater sense of self-ownership on behalf

of the industry, as just two of the advantages of the partnership model. Greater accountability and credibility are insured by the agency's annual report to both government and industry.

The annual government appropriation is supplemented by revenues received from industry for cooperative marketing and sponsorships, education and training programs, advertising and listing sales, membership fees and commercial activities. "Industry has more meaningful involvement in strategic planning which has resulted in a greater sense of ownership and coordinated effort," says Sawatzky. 🍁

## Adventure is only hours away by Tom Koebel

Are your clients looking for adventure – a truly unique cultural experience and breathtaking landscapes not far from home? Look no further than Canada's northern regions: from the Yukon and the Northwest Territories to the west, to our newest territory Nunavut and Nunavik (northern Quebec) in the east.

### What – arranging travel to the Arctic? Sounds difficult and time consuming!

Had you uttered those words just 25 or 30 years ago you would have been right. Sampling the stunning offerings of Canada's North was a privilege feasible only for a select few. Today however, eco-tourists,

sport hunters, fishers and travel enthusiasts of all types and from all walks of life easily converge on Canada's northern communities from around the globe. Never has the North, the Arctic, been more welcoming, more accessible.

### What's changed?

In short, air travel, and to be more precise, jet air service linking the major northern hubs of the North with those to the South. A scant few years ago, setting up tours in the North meant the procurement of specialized charters or multiple connections and layovers. Now, trips covering distances and final destinations that once took extraordinary planning are now achieved in mere hours.

The evolution of northern air travel has had a positive and dramatic effect on life across the North. Many communities do not have highway links, and probably never will. They remain dependent upon timely and efficient air services to preserve and enhance standards of living – to link friends, families and communities and to facilitate the thousands of visitors who are eager to experience the wonderment these truly unique regions have to offer.

Now, options abound for travel to and from the North. The increase and modernization of air services into the North mean that our country's most remote regions are available for product development



Photo: Malak Photographs, courtesy of First Air.

The evolution of Northern air travel has had a positive effect on life across the North.

and trip planning by enterprising tour operators. 🍁

*Tom Koebel is publisher of Above & Beyond, Canada's Arctic Journal.*



## Storefront

### The Canadian Travel Exchange by Marc-André Charlebois

My last column focused on CanTX, the Canadian Travel Exchange, a business-to-business web portal offering Canadian destinations packaged and sold by travel retail professionals. The Exchange is bound to become the premier link between our two industries: Canadian tourism and retail travel. In my view, the advent of such a “pipeline to market” for Canadian destinations and experiences is probably the single most innovative phenomenon to hit both our industries in years. For the first time, travel retailers and tourism suppliers will be able to combine their expertise and strength to bring quality tourism products to Canadian and foreign consumers. More importantly, it is the roughly 165,000 small-and medium-size Canadian tourism operators (SMTOs) who will benefit the most from this initiative.

Presently, SMTOs’ access to markets is quite narrow. They generally have limited marketing budgets and cannot afford to reach out to potential clients, whether these clients reside close to their offering or live abroad. SMTOs face other challenges. They cannot easily partner with passenger transportation providers to offer their clients access to their product. SMTOs also have to deal with the uncertainties and vagaries of payment settlement. The seasonality of many of the offerings is also a limiting factor in running a successful small tourism operation. CanTX will provide these business people with solutions to all of these problems, and then some.

With CanTX, SMTOs and larger operators will join forces with travel retailers to package, set prices and list their products on the Exchange. It will provide software tools and training, and establish standards. Travel professionals in Canada or elsewhere in the world will be able to choose from a rich inventory of offerings, or “cobble” together their own customized offering in a dynamic fashion thanks to the Exchange suite of virtual tools.

Transaction settlement has long been the bane of many smaller tourism businesses and a major impediment to developing partnerships with other service providers in order to get their product to market. The CanTX transactional engine, governed by trust accounting rules, will guarantee payment to suppliers and listing and selling agents. Monies collected from clients will be held in trust until the travel experience is consumed. This system will also provide the necessary safeguards against end-user failure without taxing the clients.

CanTX should be in operation by this time next year. The project is now entering the development stage, with the founding partners busy raising capital from both the private and public sectors. Ultimately, the Exchange will be owned and operated by the travel and tourism industry. Early adopters will also have the opportunity to own shares in the company, thus securing another potential source of revenue.

In these times of uncertainty, when Canadian and American tourists would rather stay closer to home and not travel great distances to spend their holidays, the idea of selling Canada to Canadians and to the world makes eminent sense. CanTX is being developed and launched at a time when travel retail and tourism professionals are looking for new market opportunities. It provides our industries with the means to reinvent themselves and serves the interest of one of the most vibrant sectors of the Canadian economy. No wonder the federal government has been so eagerly supportive of such an initiative. 🍁

*If you are a tourism operator or a travel agent and would like more information on CanTX, drop me a note at [macharlebois@acta.ca](mailto:macharlebois@acta.ca).*

## Bus companies face soaring insurance costs

While both Transport Canada and the U.S. Department of Transport acknowledge the bus industry has an excellent safety record, bus operators are feeling the sting of double and even triple digit insurance premium increases. Some smaller operators are reporting rate quotations ranging from \$20,000 – \$30,000 per coach.

It all stems from property and casualty insurers who are squeezed by mounting investment losses and massive claims over the past decade. According to the *Financial Post*, most insurers are subsidiaries of, or reinsured by, U.S. and European firms who have watched their assets dwindle by \$200 billion (US) over the past two years. When the markets were strong, investment income more than offset underwriting losses.

In addition to soaring losses on investments, there have been unexpectedly large claims. Examples include 9/11 (one third of the world surplus was eliminated in one day), massive losses associated with Enron and Worldcom, tobacco industry claims, and asbestos litigation settlements.

Even within the bus industry, general bussing risk costs are also soaring. According to John Slade, National Transportation Leader for Marsh Canada Limited, the insurance industry’s experience in bussing continues to spill red ink; for some insurers the damage is fatal. Reinsurers have increased their costs exponentially to meet their losses in bussing and elsewhere. Surpluses have to be rebuilt to withstand future catastrophes. Experts suggest that the overall loss ratio for bussing in 2001 was

110 percent, meaning for every dollar they take in, in premiums, they pay out \$1.10 in claims and expenses.

There are fewer companies willing to insure buses. Some Lloyd’s syndicates have withdrawn, Markham General has failed, AIT withdrew its facilities in Canada and now underwrites from Atlanta. Allianz and AXA withdrew from bussing, and some of the remainder such as Royal, Co-operators, Old Republic, and CGU have curtailed their facilities. Those continuing to insure buses have introduced more restrictive underwriting requirements designed to lead them into more profitable business.

It is predicted this insurance “cycle” will last longer than previous cycles because new capital coming into the industry since 2001 is marginal compared

to what has been lost. For the insurance industry to expand with new capacity, new shareholders will have to invest, and for this to happen they need to see the potential for profit. Some experts suggest it will take at least until the fourth quarter of 2004!

To mitigate rate increases, bus companies must have loss prevention, compliance programs and safety cultures that are strong, evident and produce good results. Conscientious drivers, higher deductibles, and reduction in accidents, convictions and claims will help control rate increases. It is important to get a good broker who understands the bus industry and who can work closely with the bus company to obtain the best rate and coverage. 🍁

## Roads across the border

In total, Americans took a record 10.6 million overnight auto trips to Canada in 2002, up 7 percent over 2001 levels. As worldwide destinations witnessed double-digit declines in U.S. travel, the geographic proximity of Canada's most important international market helped boost U.S. tourism levels to Canada in 2002. Traffic at the top ten land entry ports totaled almost seven million, an 8 percent increase from one year earlier.

A large portion of the American population can drive to Canada via the 128 land border crossings that dot the Canada/U.S. border. They range in size from small two-lane crossings to multi-lane highways that transport thousands of travellers daily. Ranked on the basis of U.S. overnight auto trips, the top ten land border crossings are concentrated in Ontario, Quebec and British Columbia. These ten crossings account for seven out of every ten American auto travellers visiting Canada on an overnight trip.

With combined traffic, the Windsor Bridge and Tunnel was by far the busiest land port with 1.1 million American overnight auto travellers using this route in the first eleven months of 2002. This represented an 8 percent jump over 2001 traffic, which is in line with the increase

in overnight auto traffic overall. Fort Erie, Ontario welcomed almost 900,000 travellers, a 14 percent growth rate over the same period in 2001. Sarnia was not far behind with 834,000 American auto travellers.

Douglas BC, which borders near Seattle Washington was the fourth busiest land port of entry, although overnight traffic dipped 2 percent to 796,000. On the other hand, Pacific Highway, which ranked ninth, saw an 11 percent surge in traffic to 428,000.

Niagara Falls is another area heavily travelled by Americans, with two of the three border points in that region ranking fifth and sixth. Close to 1.6 million travellers made their way across these two bridges during the January to November months, an 8 percent growth in overall trips. Lansdowne, Ontario, which lies in the heart of the 1000 Islands tourism region, cleared almost half a million auto travellers to Canada in 2002.

Quebec's Lacolle Route 15, reported the largest percentage increase in traffic with an 18 percent jump in traffic flow. Phillipsburg, Quebec welcomed about 14 percent additional travellers to the province. Across the country, Quebec posted the largest gain (15 percent) in overnight auto traffic in 2002. In comparison, Ontario witnessed an 8 percent growth rate compared to 4 percent for British Columbia. 🍁

## Enhancing access to info

The Canadian Tourism Commission (CTC) is set to update its corporate Web site, including the Canadian Tourism Exchange (CTX). The work will be managed by the CTC's E-Marketing and Communications teams.

The goal of this exercise is to enhance technology and content so that users may fulfill their information requirements within an environment that is easy to understand and navigate.

The CTC has completed a preliminary "requirements gathering" and a Request for Proposals will be released shortly to the Internet technology industry. But there's still plenty of time for you to share your ideas with us. How do you use the CTC corporate Web site (canadatourism.com)? What

works well for you? What doesn't? What would you like to see in terms of content? Is there anything missing?

We've got a lot of ideas ourselves! For instance, because *TOURISM* magazine is a monthly publication, we've begun regularly directing our readers to the Web site for the most up-to-date information around breaking news and events. Our plan is to continue to integrate both print and electronic media to bring you the most comprehensive information possible. What do you think? 🍁

*We welcome your opinion. Please feel free to share your ideas/comments with Isabelle Des Chênes, director of communications, at (613) 946-2122 or [deschenes.isabelle@ctc-cct.ca](mailto:deschenes.isabelle@ctc-cct.ca).*

## Hotel sector challenges

Commenting on Canada's inventory of hotel accommodation, Hotel Association of Canada (HAC) chairman Michael L. Jackson noted that a recent HAC report showed an inventory increase of 1.5 percent nationally or 8,700 rooms in 2001. "That is not quite one large hotel by Vegas standards," said Jackson, speaking at the association's annual meeting in early February, "but it gives us perspective with 6,526 hotels in Canada and 367,000 rooms."

Jackson went on to say that the prices of hotel bookings via the Internet have been dropping "because of such readily transparent competition; online price wars force a "commoditization" of hotel rooms, as pricing alone becomes a greater concern, and an easier comparison, for consumers," he noted. "Just look at what happened in the airline industry when the Internet allowed fliers to search hundreds of flights and carriers for the best fares!"

"Businesses that wish to survive and thrive in the new global economy, must respond to change," said Jackson. "We must determine the optimal structures that will enable us to develop the best value added business models. Only then will we ensure our ongoing competitiveness."

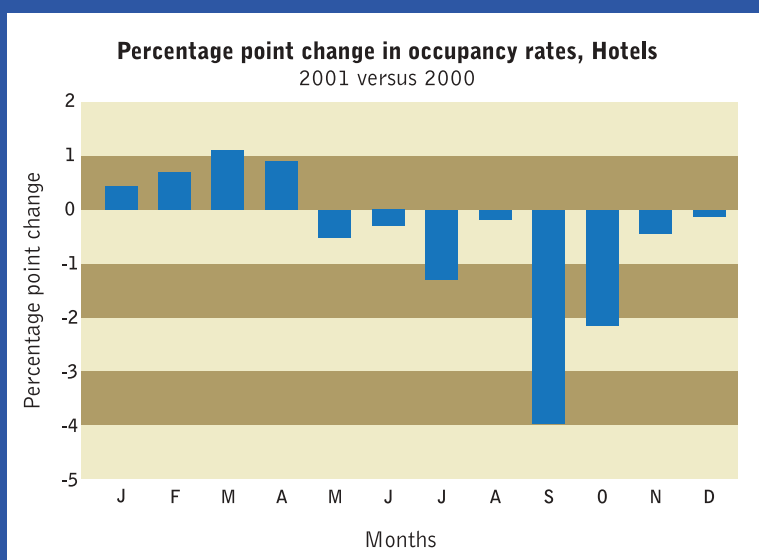


The figure shows the decrease experienced in the demand, as measured by the monthly occupancy rates, for hotels and motels in 2001 compared to 2000.

It also shows the largest year-over-year drop (-4 percentage points) in the monthly occupancy rate occurred in September 2001 over September 2000 following a general decline in occupancy rates during the summer of 2001 and the aftermath of September 11th.

In both years, 2000 and 2001, the occupancy rate for hotels was highest in August, at 75%. In September 2000 the occupancy rate displayed a seasonal drop to 69%. However, in September 2001 the occupancy rate dropped further to 65%. In the last quarter of 2001, it continued to experience reductions compared to 2000. It was only in December 2001 that the occupancy rate for hotels approached the same level as in December 2000. 🍁

For more information on the survey: [veronica.utovac@statcan.ca](mailto:veronica.utovac@statcan.ca).







## New lure piece hits North America

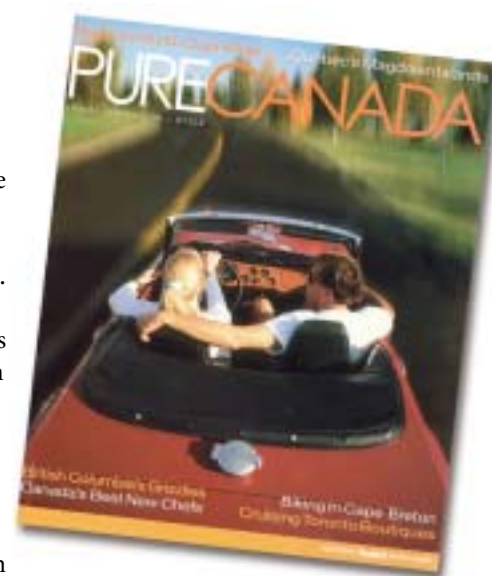
PURECANADA is the Canadian Tourism Commission's (CTC) new consumer travel magazine created for the Canada and U.S. marketing programs to use as a primary communications channel to consumers. The new magazine represents an important

philosophical shift towards experiential-focused communication.

The content highlights the experiential nature of the Canadian product through objective editorial coverage written by professional writers

and photojournalists, reinforced by a 62-page Fodor's Micro Guide to Canada in every issue. This feature includes destination overviews, maps, travel tips and "must see locations" while travelling Canada. Through expanded and targeted distribution, the magazine provides an essential vehicle for small, medium and large industry stakeholders.

The magazine will be used as the primary fulfillment piece for all inquiries and requests for information that are directed from Canada and the United States to the CTC. This includes all the 1-800 numbers, Web site inquiries and sales activities in the Canada and U.S. markets. Other distribution options will include targeted direct mail, retail outlets and delivery during sales and promotional events to targeted client audiences.



PURECANADA will be published in two editions annually: spring/summer and fall/winter. It was released to the North American market in February 2003. 🍁

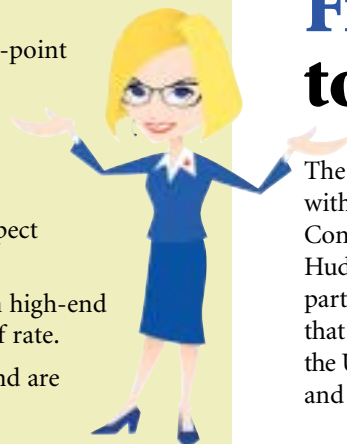
For more information: [schwilden.mark@ctc-cct.ca](mailto:schwilden.mark@ctc-cct.ca).

## Conference power brokers

With 58 associates in 19 countries on 5 continents, HelmsBriscoe International is an 11-year old company that is now the largest purchaser of group hotel rooms in the world, booking more than 18,000 meetings in 2002. Seventy-five percent of the company's business is U.S. and 25 percent is international; by 2007 the company expects to be in 40 countries with 400 associates.

Tourism service providers interested in the conventions and incentive travel market may have a lot to learn from this corporate achiever. HelmsBriscoe makes some compelling points:

- The booking window is short term and intense; speed-to-market is critical to win business.
- Clients are choosing destinations with point-to-point air service with low cost carriers.
- Long haul and offshore destinations continue to be challenged by higher costs and perception issues.
- Consumers believe it's a buyers' market and expect reduced rates and more concessions.
- Corporate market clients are staying away from high-end destinations and luxury properties regardless of rate.
- Conventions are becoming shorter in length, and are booked with shorter lead times (4-8 weeks).



HelmsBriscoe has been hosting forums for convention and visitor bureaus (CVB) and tourism offices. In the last two years, the Canadian Tourism Commission, Tourisme Québec, Tourisme Montréal, Tourism Vancouver and Tourism Whistler have attended. Some information highlights:

- HelmsBriscoe has a "number one" rule: whoever gets to them first, probably has the business!
- Their biggest concern is CVBs who send leads to everyone in their membership. If they ask specifically for a five star property within a specific distance from the airport, that's all they want to hear from.
- Many times they work with short-term business and hope to make one call and get a decision. 🍁

For more information: [owens.donna@ctc-cct.ca](mailto:owens.donna@ctc-cct.ca).  
To learn more about the company: [www.helmsbriscoe.com](http://www.helmsbriscoe.com).

## From fur trade to first class meetings

The province of Ontario along with the Canadian Tourism Commission (CTC) and the Hudson's Bay Company (HBC) are partners in a marketing promotion that focuses on a lucrative sector of the U.S. travel market – the meetings and conventions business.

With the slogan "Ontario, Canada... Great meetings come naturally", the campaign urges professional American planners to book meetings and conventions at Ontario destinations. As an incentive, planners will receive gifts for their delegates: coupons worth \$20 for shopping at HBC. HBC's heritage as a fur trading company is well-known to Americans, many of whom first hear of Hudson's Bay Company in history class in grade school.

"We know well from our research that delegates to conventions love to shop," said Patricia Nicholl, of the Ontario Tourism Marketing Partnership (OTMP), the public/

private sector agency responsible for the promotion. "And when Americans attend business meetings in Ontario, naturally they want to shop at distinctive Canadian businesses like HBC. The gift coupon is Ontario's way of thanking planners for their business."

Destinations that are participating in the campaign include Toronto, Ottawa, London, Hamilton, Windsor, Sault Ste. Marie, Sudbury, Thunder Bay, the Muskoka and Niagara regions, and the group Resorts Ontario.

The choice of a retail giant such as Hudson's Bay Company as a partner underlines the marketing message that, like HBC, Ontario has a long history, a strong reputation, and business savvy. "It seemed a good fit for the CTC, Ontario and the Bay, Canada's oldest retailer, to work with each other," said Donna Owens, marketing director, MC&IT - CTC. 🍁

# A Saguenay success story

In January, the Canadian Tourism Commission's (CTC) Guy Desaulniers hosted a media fam tour jointly sponsored by the Fédération touristique du Saguenay and the CTC. Three journalists (two from Fredericton and Thunder Bay snowmobiling magazines and a third from an Ottawa daily) took part. The all-Canadian contingent of writers reflected only some of the media coverage the region has received: articles published in renowned publications such as the *National Geographic Traveller* or the German edition of *GEO* have made an immediate impact. After a nine-page story appeared in the August 2002 edition of the *Traveller*, readers from as far as Austria and Iceland were calling to book trips!

Desaulniers says that, with a playground like the Monts Valin mountains towering over the magnificent fjord in which whales, seals, and the occasional shark frolic with the tides, it's easy to understand why so many Europeans succumb to the charms of the Saguenay. Quebecers, too, flock there and a growing number of Americans are also showing up to enjoy the pleasures of winter.

But it is shortly after New Year's that Europeans seeking "white adventures" with the snow begin arriving in droves. Germans, Italians, but above all the French, come to enjoy everything from dogsledding and snowmobiling to snowshoeing and ice fishing.

In fact, 98 percent of tour operator Régis Fournier's winter season customers are European. Fournier, co-owner of Québec Hors-Circuits, has even had to turn away customers this year, something he does with great reluctance because he works hard with other outfitters on a number of projects to develop add-on products and to extend the guests' length of stay.

Many of the European travellers have been coming as part of incentive trips, although the 2003 incentive numbers may be slightly off in favour of individual vacationers. Fournier works closely with international tour operators, markets on the Internet, and takes part in a number of trade shows (four in the U.S., two in Canada, and two in Europe).



Photo: Steven Ferlatte, courtesy of the Canadian Tourism Commission.

Growing numbers are enjoying the Saguenay's winter pleasures.

From wintertime experiences like savouring the sweet aroma of meat pie sizzling on a wood fire set upon the frozen lake, to summers spent sea kayaking, biking, and canoe-camping, the whole of the Saguenay is a special place. The injection of \$6 million over three years under a recent special tourism agreement for Saguenay/Lac-

Saint-Jean will encourage local businesses to improve the range of tourism products and services on offer. The agreement is expected to result in some \$30 million in investments and the creation of 500 jobs. ❄️

*For more information on the Saguenay Lac-Saint-Jean Region:*  
[commercialisation@tourismesaglac.net](mailto:commercialisation@tourismesaglac.net).

## CTC receives marketing award

The Canadian Tourism Commission (CTC) will receive the 2003 Gay Destination of the Year Award during this year's ITB in Berlin for excellence in tourism marketing towards the gay and lesbian target group.

The CTC and its partners have developed a complete marketing approach for the gay and lesbian segment, including a Gay Canada Guide (brochure) and a Gay and Lesbian Web site.

Supporting partners are Tourisme Montréal, Ontario Tourism, Tourism Whistler and CRD International. ❄️

*For more information:* [www.gaycanada.de](http://www.gaycanada.de).



## Untangle the Web

by Greg Klassen

*Should I be listing with every "freebie" offering by travel-oriented Web sites, or is this a waste of time?*

I am seldom offered a free listing from travel-oriented Web sites, but get daily pitches to advertise on fee-based sites. From my experience, what you see is probably what you get. While many listings are looking to develop a comprehensive database of travel products and services for their site visitors, others will use this as leverage to upgrade you to a fee-based advertising service. It's a lot like the yellow pages, except there are millions of books!

My criteria for buying listings would probably be the same for free listings: advertise your Web site where your target market might find you. Ask your best customers which sites they visit for their travel information, look at the free listing sites (and all sites you intend to advertise on for that matter) to see if any of your partners or competitors are there.

Finally, look at the quality of the Web site – you're only as good as the company you keep! If you've got a top quality resort and are advertising on a poorly designed, homemade Web site, then you aren't going to do much for your "quality" brand.

There are a few high quality Web sites in Canada that do offer free listings and are probably worth the investment of time. Two listing sites that immediately come to mind are [www.canada.worldweb.com](http://www.canada.worldweb.com) and [www.canadatravel.ca](http://www.canadatravel.ca). Check out their free basic listing services and fee-based upgrade options. ❄️

*We welcome our readers' questions on managing their tourism Web sites. Please e-mail them to [tourism@ctc-cct.ca](mailto:tourism@ctc-cct.ca).*

## Highways: trails of discovery

With gains in the U.S. rubber-tire market up seven percent from 2001, it has become clear that Canada's highways are more vital than ever to the health of her tourism industry. Americans made a record 10.6 million trips to Canada by car in 2002 and many more will likely do the same this year. Opportunities for product development along our highways have never been greater.

While sightseeing along Canada's country roads and highways has long been an industry staple, a number of highway trail communities are joining a trend that goes a step beyond. They are developing themes, forming partnerships between nearby industries, and emphasizing the natural strengths of highway trails, be they cultural, historic, scenic or all three.

La Route des Saveurs (lit. "Flavour Trail") in Quebec's Charlevoix region, for one, has found a unique

way of integrating both restaurateurs and local agricultural producers into the trail experience. The trail boasts a number of fine-dining restaurants which use regional produce in their cuisine. In turn, the farmers who produce special ingredients like the unique miniature vegetables featured in their dishes, offer guided tours providing visitors with an opportunity to learn more about from where their food comes. Signs which show a chef's hat and logo are posted on participating restaurants and farms that line the route.

On a larger scale, the Niagara Peninsula boasts an official wine route which directs travellers to the region's numerous wineries. Clearly marked along the way, the wine route unites the Niagara region's various Bed and Breakfasts, historic sites, annual festivals and other leisure activities, resulting in a fully integrated "highway" or "trail" product.

While many highways such as

Nova Scotia's Cabot Trail rely upon the standard attraction of spectacular vistas, others, such as the Acadian Coastal Drive in New Brunswick, highlight cultural "flavours" as a means of attracting visitors. The Acadian is just one of five tourist routes New Brunswick has begun to promote to motorists in recent years. Even language can be developed as a travel generator (see next page, *Travelling the West in French*).

Other highway trails find their promotional strength in their history. Both the Red Coat Trail (crossing the south end of the prairie provinces) and the Yellowhead Highway (stretching from Portage la Prairie, Manitoba to Tête Jaune Cache, Alberta and beyond) highlight their heritage as early trade or exploration routes.

The Trans Canada Yellowhead Highway Association has been actively involved in major tourism

promotions for a number of years, especially targeting U.S. motorists and RV-ers, and has successfully lobbied to have the highway designated a northern route of the Trans Canada Highway. The inaugural issue of *Yellowhead IT!*, a travel magazine due out in March, involves partnerships with the four western provinces and communities along the corridor, according to Irene Davidson-Fisher, the association's chief executive officer.

From west to east, the choices are many for motorists on vacation in Canada. Communities are beginning to discover the marketing value of branding their highways, and creative communities are working together to enhance not only the "brand name" of their connecting corridors, but also the overall tourist experience, with friendly and accessible attractions and visitor services. 🍁

## Understanding the motor coach industry

A strong and viable motor coach industry has a significant impact on the tourism and convention industries. As a rule of thumb, one overnight motor coach tour generates approximately \$7,000 per day to the economy. On a yearly basis, the CN Tower reports more than 6,000 coach visits and Niagara Falls reports over 40,000 visits. Even less populated areas receive significant coach business: in 2002, 958 coaches entered Prince Edward Island, bringing 35,948 people to that province.

These statistics don't tell the whole story. As an example, the inbound Asian tours that contribute so much to Canada's tourism revenue are generally considered as arriving by air. While this is true, it is also true that virtually all of these tours require motor coach transportation from and to airports, attractions

and hotels. Indeed, the motor coach industry is becoming much more integrated with other transportation modes (rail, road, marine and air). Nowadays, coaches are often authorized to drive directly onto airport aprons to pick up passengers from the aircraft.

In terms of annual ridership densities, scheduled bus passenger traffic makes up about 3 billion passenger-kilometers (20 percent) while charter and other passenger traffic makes up about 11 billion passenger-kilometers (80 percent). Organized group leisure travel dominates the charter/other services, while the trip purpose for scheduled service varies widely and includes family visits, school and commuting. Business travel by bus is

not yet a major component of total scheduled bus ridership, but business traffic volume is growing on short-haul corridor routes such as Ottawa/Montreal, Quebec City/Montreal and Calgary/Edmonton.

Motor coach tour passengers have traditionally been seniors or 50+ but this has expanded recently with the growth in specialized tours like theatre and soft

adventure. Indeed, charter passengers are of all ages, usually brought together by a specific event or a common interest (country & western music tours or casino trips). 🍁

*Motor Coach Canada is a national association representing motor coach and tour operators. For more information: 416-229-9305 or [www.motorcoachcanada.com](http://www.motorcoachcanada.com).*



Photo: courtesy of Motor Coach Canada.

# Travelling the West in French

by Daryl Adair

An effort to promote a Western Canada travel corridor offering bilingual services and attractions got its start in 1999, when *Le Corridor touristique francophone de l'Ouest* (more simply known as *Le Corridor Ouest*) started working with bilingual businesses and with francophone provincial tourism coordinators.

Research was conducted to determine the market for bilingual services and francophone attractions in Western Canada identifying the 50+ traveller from the province of Quebec. *Le Corridor Ouest* coordinator Simone Neveaux says, "our markets are

interested in travelling to Western Canada and like to know they can do it in the four western provinces while speaking French."

Neveaux has been attending trade shows in the province of Quebec and letting travellers know about the numerous French options available. These include original French Canadian travel experiences such as Manitoba's "In the footsteps of Riel", live theatre in the St. Boniface Cathedral Cemetery, bilingual services available at National Monuments and Parks throughout the West, and attractions with strong French roots such as the community

of Gravelbourg, Saskatchewan. Accommodations and toll free numbers are also available for all the western provinces where visitors can be assisted in French.

*Le Corridor Ouest* has documented all the attractions in Western Canada in a guide book and on a Web site with contact information for all the provincial coordinators. 🍁

*For more information:*  
[www.lecorridor.ca](http://www.lecorridor.ca).  
*Daryl Adair is the owner/operator of Rail Travel Tours:*  
[www.railtraveltours.com](http://www.railtraveltours.com).



Photo: courtesy of [www.festivalvoyageur.mb.ca](http://www.festivalvoyageur.mb.ca).

The Festival du Voyageur is just one of the francophone attractions in the west. In 2004, the festival will be held February 13-22.

## Ontario backroads and getaways

The Ontario Receptive Alliance (ORA) has created a retail brochure, "Ontario Backroads and Getaways" providing over 100 commissionable FIT packages. The brochure is expressed in both Canadian and U.S. currencies; an accompanying trade manual will be released in early April and distributed to agencies across Canada.

Targeting the "upscale boomer" market, experiences offered in the new brochure include romantic stays at elegant country inns, spas and B&Bs which feature wine tasting, gourmet dining, theatre and boutique shopping. For those who prefer to vacation in the great outdoors, there are guided walking and biking programs, paddling adventures, horseback riding, golf and fishing packages. Family getaways highlight amusement parks and attractions in Ottawa, Toronto, Niagara, London and Muskoka, as well as farm and resort vacations.

The overall initiative is supported by the Ontario Tourism Marketing Partnership. All members of ORA are licensed under the Ontario Travel Industry Act, which ensures their professional status and commitment to the industry. Almost every region of the province is represented by

a local professional travel planner who can easily customize an individual or group program to suit specific needs or budgets. 🍁

*For more information or to obtain a copy of the new "Ontario Backroads and Getaways" brochure or agent manual:*  
[info@ontariocanadatravel.com](mailto:info@ontariocanadatravel.com)  
or Janice Ketchen at 416-925-1102.



Photo: courtesy of Ontario Tourism, copyright 2003.

Romantic getaways are among the experiences offered in Ontario.

## Crumbling infrastructure curtails growth

A survey of B.C.'s tourism industry points to that province's ailing transportation system as the number one issue holding back growth and investment in the sector, says the Council of Tourism Associations (COTA) of B.C.

A significant portion of tourism operators surveyed cited inadequate highway conditions as the main issue preventing their business from reaching its full potential. Deficiencies in other areas of

B.C.'s transportation network were also high on their list including reduced service to regional airports, decreased ferry capacity and sailings, and long delays at the B.C./U.S. border.

Surprisingly, 60 percent of respondents agreed (to a certain extent) that government should allow tolls to finance major improvements to roads and bridges. "The tourism industry has made it very clear that existing highways should not be tolled," says COTA CEO Mary Mahon Jones. "(but) our industry has shown some support for tolls to finance major improvements of roads and bridges, but these tolls shouldn't be considered where alternate routes are not available."

Tourism operators cited decreased service and the need for improved facilities at regional airports as the second most pressing issue facing the industry. Respondents overwhelmingly called for an overhaul of Canada's airline sector to encourage more competition, with nearly 50 percent saying that U.S. airlines should be allowed to fly within Canada, provided Air Canada and Canadian carriers have similar rights in the U.S. 🍁

*For more information:*  
[www.cotabc.com](http://www.cotabc.com).

# Product Clubs

## Re-floating a cruise-ship industry

The task of re-establishing a passenger ship cruising industry on Canada's Great Lakes has challenges that may not be readily apparent. Nonetheless, that is the goal being embraced by the Inland Waterways Cruising Product Club.

The Great Lakes have all the ingredients needed for successful cruising: magnificent scenery, waterfront cities with well developed tourism facilities, and a rich mix of cultural and historical institutions. There are many attractive smaller communities surrounding the lakes, and a well-oiled maritime industry is in place that can handle all types of vessels.

Since most modern ships no longer fit into the St. Lawrence Seaway locks, the challenge is to find cruise ships which are deemed to be "Seaway capable" in terms of their physical dimensions, and "Seaway compliant" in terms of Canada's regulations that deal, for example, with the disposal of waste water.

The second part of the Great Lakes cruising puzzle has been both to work with existing tour operators, and educate others, of this excellent economic opportunity. Some ship owners prefer to market their own ships, some prefer to charter them, and others prefer a mix of the above. As the Product Club's

Stephen Burnett puts it, "we need to act as a 'maritime marriage broker', locating ships and bringing them to the attention of potential charterers."

Business was moving along well until the 9/11 event, at which point one shipping firm went out of business and that company's ship inventory was lost. Now, after much effort by supporters of the industry, the future looks good for Great Lakes cruising. "Owners of newly built ships are doing business with North American charterers," says Burnett, "and consumers are looking for new and interesting vacations nearer home!" 🍁

For more information e-mail: [stephenburnett@sympatico.ca](mailto:stephenburnett@sympatico.ca).



Photo: courtesy of the Inland Waterways Cruising Product Club.

The Great Lakes have all the ingredients for successful cruising.

comments Michel Vachon, the product club coordinator. 🍁

For more information: [mvachon@ecofly.org](mailto:mvachon@ecofly.org).

## Targeting recreational aviation

The Aerotourism Product Club wants to attract "tourist-pilots" who will come to Canada from the U.S. and European market. The club's goal is to create a network of international-caliber airports where four-season ecotourism activities (with stopover destinations offering high-quality hospitality services) are available to recreational pilots.

Based in part on the snowmobile trails model, the product club was initiated by an interdisciplinary team of researchers and developers in aerotourism. Current partners include the Canadian Tourism Commission, Tourisme Québec, Transports Québec, the Chair in Tourism at the Université du Québec in Montréal, and Explorer

Aéronautique. The American Owners and Pilots Association, with 450,000 members, and the Aéroclub de France (150,000 members) have also expressed their support for this initiative.

"Canada already has the airport infrastructure in place and many of these destinations are underused,"

## Legend of la chasse-galerie

**H**ere was a time in Quebec when, come winter, many farmers and fishermen would say goodbye to their families until spring and head off into the bush to supplement their incomes as lumberjacks. The tale of the "chasse-galerie" (Hunting Gallery) reveals much about the loneliness of the camps, and the daring of the men!

It was New Year's Eve in the lumber camp and eight men began to yearn for their girlfriends. It had snowed all day, and a man with much rum in his belly cried out "Why aren't we going back to the village where the girls are waiting with dancing and songs? With only a canoe, we can fly over the snow and the forest in the Hunting Gallery!"

After much argument, a priest among them reluctantly invoked the devil with these words: "O rebel angel, king of the demons, make this canoe fly! We pledge you our souls if we're not back here by dawn, or if we take the Lord's name in vain."

So the canoe flew high above the treetops to the village, where the lumberjacks celebrated with wine and song until before dawn. They gagged the drunken priest lest he curse, but as the canoe once more mounted to the sky the priest managed to free himself, exclaiming, "Good God, how could you tie me up?"

With that curse, the canoe hit the top of a giant pine, spilling all those inside into a huge void beneath the forest floor. And no one has seen them since.



Photo: courtesy of Unibraie Inc.

# On track to see Canada!

Few could have predicted the number of train-related tourist excursions and attractions that are now available in Canada. A new initiative, involving a partnership between the Railway Association of Canada (RAC) and the Canadian Tourism Commission has just gathered them under one umbrella and made them more available to travellers within Canada. CANADA BY RAIL has created a comprehensive user-friendly one-stop Web site resource for all rail-related leisure opportunities in every region in Canada.

Officially launched in December 2002, the response has been terrific. Already, this resource offers information and links, by province and area of interest to museums, rail excursions, historical societies, Bed and Breakfasts, restaurants, hotels, and 14 RAC members offering tourist services. The Web site is designed to showcase these year-round venues with an easy-to-use interactive 'point and click' map of Canada. The beautiful photographs in Photo Gallery have proven very popular and can be downloaded.



Photo: courtesy of Rocky Mountaineer Railtours®.

Canada has many rail-related tourism venues.

Bill Rowat, RAC president, proudly reports, "we have been thrilled with the response. Canada has so many varied and interesting rail-related tourist venues to bring to the attention of travellers, both within Canada and for those travelling to Canada from other countries." 🍁

For more information:  
[www.canadabyrail.ca](http://www.canadabyrail.ca).



## Riding the rails – again?

Rail passenger service may be a thing of the past, no more. Speaking in Calgary to the Conference Board, Rob Ritchie, president and chief executive of the Canadian Pacific Railway (CPR), is reported in *The National Post* as saying that getting back into the passenger business could help CPR "increase its track utilization while solving some transportation problems for governments."

"There are a number of passenger-based possibilities under development," said Ritchie. "These address both urban congestion and intercity travel needs; we hope some of these will crystallize." He said that the CPR got out of the passenger traffic business because it was unprofitable, but that could change if governments introduce new transportation policies. "A lot of people think the railways are anti-passenger," he said. "(In fact) we're anti-losing money." 🍁

# Quebec snowmobile industry on a new trail

A group of business people from Quebec's Laurentian region has entered into a partnership with the Canadian Tourism Commission (CTC) to revitalize the snowmobile product in the province. Based in Sainte-Agathe, where the first snowmobile club was born, the new group recently unveiled its action plan. "This represents an exceptional opportunity for economic development, at the regional level and for the country as a whole," says Jean Duchaine, director general of Motoneige Canada.

Duchaine is confident that the product club will help alleviate a lack of consultation and coordination among the different players involved in the industry. "For example," he says, "different levels of quality standards among snowmobile organizations have had a negative impact on marketing our product."

To increase the quality of the experience offered to visitors, Motoneige Canada plans to create a network of associations and partners who will benefit from training and information sessions, networking activities such as an extranet communication system, and other initiatives. 🍁

For more information on the product club and its services contact:  
Jean Duchaine at 819-321-3003  
or [motoneigecanada@bellnet.ca](mailto:motoneigecanada@bellnet.ca).



Photo: John de Visser, courtesy of the Trans Canada Trail Foundation.

## Trans Canada Trail

"Hockey is our winter ballet and in many ways our own national drama."

Morley Callaghan, novelist.

### British Columbia

Population	4,141,272
Area	892,677 km <sup>2</sup>
TCT	2,700 km

A winter scene near Fernie, in the Elk River Valley. The Trail travels south through the valley immediately after entering the province from Alberta. Mount Fernie (2,506 meters) looms in the background. 🍁



## The Research Viewpoint

About exogenous factors, scenarios, and other animals by Scott Meis

Sometimes there are challenges you hadn't figured on. For us here in research, a possible conflict in the Middle East represents just this sort of challenge, the kind we don't usually think about nor expect.

As regular readers of this column know, we do a lot of forecasting for the other departments of the Canadian Tourism Commission (CTC) and for the industry. Short-term perspectives (looking ahead three months) and longer-term forecasts (looking ahead three to five years) are generated on an ongoing basis, and the forecasts are published on the CTC Web site (CTX).

For those working in the tourism sector, this information is invaluable when making planning decisions. Forecasting is especially necessary because tourism is an evolving and fast-changing phenomenon. When there are fluctuations in the business cycle, you can bet that fluctuations in the tourism sector will be even greater. We need to ensure that the industry is abreast of dominant trends.

But every now and then we encounter shocks from outside the tourism sector – what we call “exogenous factors” – which are events large enough to affect all the variables with which we usually deal when we make forecasts. Events like the Gulf War in 1990-91 and the September 11 terrorist attacks in the U.S. are this sort of extreme event. They affect consumer and business confidence, the cost of doing business, access, and macro-economic factors.

When conflict started to loom again in the Middle East, we understood we could apply the insights we have learned, as well as use the formidable technology and research infrastructure that we have built, in order to produce a new animal – the “scenario”.

Scenarios are a significant departure from the normal business that is done around our research shop. Forecasts are done for the industry on an ongoing basis, but scenarios are done only for extreme events.

The result is posted on the CTX. The Iraq war scenario is the product not just of a couple months of work, but rather several years of work. We relied on expertise gained doing regular forecasting, and then factored in things we knew from the Gulf War and 9/11.

How accurate is it? It bears saying that we have a limited amount of experience with extreme events, and we were also working with a limited number of assumptions. We have estimated conservatively with our projections, something people should keep in mind when reading it. We don't pretend to wipe out uncertainties, but we have reduced them to measurable risks.

Hopefully we will not be called upon to do too many more scenarios in the future; we can all live with fewer extreme events! But when they come, we'll be ready. 🍁

*You can find What if there is a war in Iraq? at [www.canadatourism.com](http://www.canadatourism.com)*

### Business Outlook

SPRING 2003

The outlook for travel to Canada in the spring of this year from Canada's major markets is summarized below. The data are from the spring 2003 Business Outlook (BO).

#### North America markets

For the spring of 2003, U.S. travel is expected to increase by 5.2 percent while domestic leisure travel is expected to increase by 4.3 percent. As in previous BO reports, domestic leisure travel is expected to outperform business travel (4.7 percent versus 3.6 percent). On the other hand, the U.S. growth will be led by group travel, up 7.5 percent, more than the other travel segments. Canada will continue to benefit from more Mexican visitors as the *BO Monitor* participants expect a growth of 4.3 percent in leisure travel, including a 6.0 percent increase in group leisure travel. This growth is spurred by an expanding economy and favourable perceptions of Canada as a safe destination.

#### Europe

*BO Monitor* participants anticipate a strong rebound in U.K. leisure travel to Canada, particularly in light of last year's declines. Overall, U.K. travel to Canada is poised to increase by 7.6 percent. The outlook for leisure is stronger than for business travel. More specifically, group leisure travel is expected to register a 12.0 percent increase, and independent leisure travel is expected to increase by 7.0 percent. Weak consumer and business confidence as well as declining investment spending will constrain travel from France. Overall there will be a 6.5 percent increase in travel from France, led by a 7.1 percent increase in leisure travel. Specifically, independent leisure travel is expected to increase by 8.0 percent. Relative to last year's declines, Germany is expected to rebound quite sharply over the second quarter of 2003. Overall travel will grow 6.8 percent, with leisure travel posting the strongest growth (up 10 percent). Travel from Italy will increase

by 10 percent overall, aided by improved direct air capacity. *BO Monitor* participants expect that travel from Netherlands will increase by 5.0 percent. This growth is aided by increased air capacity and strong bookings for the second quarter of 2003.

#### Asia/Pacific

The uncertainties over a possible war in Iraq is hindering travel by Japanese. Overall, travel from Japan will increase by a modest 2.8 percent. In particular, independent leisure travel will increase by 6.0 percent. Business travel is expected to be weaker, with only a 2.0 percent increase. In Taiwan, the economy continues to fare well but, unfortunately, air capacity to Canada is expected to be reduced by 2.0 percent. As a result, there will be a modest 1.8 percent increase in leisure travel. Independent leisure travel will lead the way (up 5.0 percent) while group leisure travel will be flat. South Korea and Hong Kong are expected to post growth of

6.5 and 5.0 percent, respectively. China, one of the strongest economies in the world, is expected to register a 4.9 percent increase in leisure travel with group leisure at the forefront (up 5.0 percent). The outlook for Australian visits is for an increase of 6.9 percent in leisure travel. More specifically, group leisure travel will increase by 12.0 percent. *BO Monitor* participants expect a 3.8 percent increase in leisure travel from New Zealand and a 4.5 percent increase in independent leisure travel.

Overall, 2003 will start off somewhat brighter, but the uncertainties associated with the global economy, the events of September 11th and a possible conflict in the Middle East are still a deterrent to overseas travel to Canada. A possible war in Iraq will also keep more Canadians at home during the next six months resulting in an increase in domestic travel growth. 🍁

# TAMS The overview

Canada offers a wide range of tourism experiences to its residents and to potential travellers from the United States. In order to obtain a better understanding of the potential size, characteristics and interests of Canadian and American activity-based market segments, the Canadian Tourism Commission's Market Research department commissioned a series of special analyses and reports based on the Travel Activities and Motivation Survey (TAMS). These reports provide a rich source of information for tourism businesses and marketers.

While individual profile reports focus on specific activity-based segments in the U.S. and Canada, an overview report provides an excellent synopsis of TAMS and interpretations of similarities and differences between the various activity groups and travellers from Canada and the U.S. Some key findings from the overview report:

- Canadian travellers appear to have a stronger outdoors and winter orientation than do their American neighbours. Among all Canadian adults, the largest three TAMS market segments are associated with the outdoors: Soft Outdoor Adventure, participation in Other Winter Outdoor activities, and Alpine Skiing.
- Among American adults, only one of the top three segments is associated with the outdoors – Soft Outdoor Adventure. Heritage and Visual Arts tourism enthusiasts round out the top three. (See Tables).
- While Soft Outdoor Adventure Enthusiasts comprise the largest segment in the U.S., they are ranked second among American adults with recent travel experience in Canada. Heritage enthusiasts rank first. This suggests that perhaps Canada may be missing out on attracting a larger share of outdoor enthusiasts.

Rank Order – All Adults	
Canada	U.S.A.
1. Soft Outdoor Adventure	1. Soft Outdoor Adventure
2. Winter Outdoors	2. Heritage
3. Alpine Skiing	3. Visual Arts
4. Heritage	4. Wine/Culinary
5. Visual Arts	5. Alpine Skiing
6. Wine/Culinary	6. Hard Outdoor Adventure
7. Hard Outdoor Adventure	7. Performing Arts
8. Performing Arts	8. Winter Outdoors

Rank Order – Adults with Recent Travel Experience in Canada	
Canada	U.S.A.
1. Soft Outdoor Adventure	1. Heritage
2. Winter Outdoors	2. Soft Outdoor Adventure
3. Alpine Skiing	3. Visual Arts
4. Heritage	4. Wine/Culinary
5. Visual Arts	5. Alpine Skiing
6. Wine/Culinary	6. Performing Arts
7. Hard Outdoor Adventure	7. Winter Outdoors
8. Performing Arts	8. Hard Outdoor Adventure

Not surprisingly, there are considerable overlaps between the activity-based interest groups. Awareness of these overlaps may prove useful for packaging and marketing Canada's tourism products; information is available in the individual reports.

In addition to a current profile of the various tourism enthusiasts, the TAMS survey was modified by using population projections to permit an assessment of the impacts of an *aging* population on market potential for these groups. Comparisons of the market size, composition, and travel behaviour of Canadians and Americans in 2000, with estimates of the market profile in 2025-2026 are also available in each of the reports. ❄️

*For more information on the market size of the TAMS segments, overlap among segments, regional strengths and weaknesses, the competitive environment, Canada's image, demographic variations, and projection information, please stay tuned to the CTX ([www.canadatourism.com](http://www.canadatourism.com)). The overview report will be available this spring and the following reports featuring profiles of outdoor and cultural segments in the United States and Canada will also be available soon:*

- *Soft Outdoor Adventure Enthusiasts*
- *Hard Outdoor Adventure Enthusiasts*
- *Heritage Enthusiasts*
- *Performing Arts Enthusiasts*
- *Visual Arts Enthusiasts*
- *Wine & Culinary Enthusiasts*
- *Winter Outdoors Activity Participants (excluding Alpine Ski)*
- *Alpine Ski Tourists (U.S. only).*

## A MONTHLY GUIDE TO TRAVEL AND TOURISM DATA

TOURISM ACTIVITY	REFERENCE PERIOD	QUANTITY	% CHANGE FROM PREVIOUS YEAR
<b>TOURISTS TO CANADA</b>			
From the U.S.	January – Dec. 2002	16,152,067	3.7
By Auto	January – Dec. 2002	10,607,182	7.3
By Non-auto	January – Dec. 2002	5,544,885	-2.4
From Overseas - Total	January – Dec. 2002	3,889,805	-5.3
United Kingdom	January – Dec. 2002	749,659	-11.7
Japan	January – Dec. 2002	436,510	4.3
France	January – Dec. 2002	313,987	-12.9
Germany	January – Dec. 2002	295,715	-13.3
Hong Kong	January – Dec. 2002	119,449	-5.9
Australia	January – Dec. 2002	157,610	-4.6
Taiwan	January – Dec. 2002	105,139	-10.1
Mexico	January – Dec. 2002	161,843	7.7
Korea (South)	January – Dec. 2002	151,476	6.0
<b>OUTBOUND CANADIAN TOURISTS</b>			
To the U.S.	January – Dec. 2002	12,968,103	-4.0
By Auto	January – Dec. 2002	7,690,883	1.3
By Non-Auto	January – Dec. 2002	5,277,220	-10.9
To Overseas - Total	January – Dec. 2002	4,680,267	-3.1
<b>EMPLOYMENT IN TOURISM</b>			
Total Activities	Third Quarter, 2002	604,100	0.5
Accommodation	Third Quarter, 2002	145,300	-0.3
Food and Beverage	Third Quarter, 2002	144,900	2.0
Transportation	Third Quarter, 2002	79,600	-3.4
<b>SELECTED ECONOMIC INDICATORS</b>			
Personal Disposable Income per person (\$)	Third Quarter, 2002	22,296	0.7
GDP at market prices (current, \$ billion)	Third Quarter, 2002	1,151.8	1.2
GDP chained (1997, \$ billion)	Third Quarter, 2002	1,066.6	0.8
CPI (1992=100)	January 2003	121.4	4.5
<b>EXCHANGE RATES (IN CDN\$)</b>			
American dollar	January 2003	1.5410	-3.7
British pound	January 2003	2.4921	8.7
Japanese yen	January 2003	0.0129	6.6
EURO	January 2003	1.6373	15.8

Note: All tourist estimates deal with trips of one or more nights; All data on this table is not seasonally adjusted.

Sources: Statistics Canada and the Bank of Canada.

## Confidence returning

The fifteenth annual National Opinion Polls Inc. survey of Canadian travel agents looks at, among other issues, the effects of the terrorist attacks of September 11, 2001 on the agency sector.

Four out of five agents reported that the events of 9/11 had had a negative effect on their agency's performance, the principal results being decline in business (44 percent), financial losses (20 percent) and cancellation of bookings (17 percent).

Two out of three agencies responded with measures to stimulate business,

including increased sales and promotion (26 percent) and efforts to convince people that travel is safe (23 percent). One in three retrenched with staff layoffs (15 percent) and other cost reduction initiatives (17 percent).

Despite these immediate effects, one in four agents claim that business is better now than before 9/11, although 36 percent say that sales remain depressed. ❄️

*For more information: Frank Kieley at 416-360-1311 or [jfk.yyz@sympatico.ca](mailto:jfk.yyz@sympatico.ca).*





The **Wedgewood** in Vancouver and Ottawa's **Chateau Laurier** ranked 12 and 36 respectively among the Top 50 hotels in North America in a reader survey in the current *Conde Nast Traveler*. The Chateau Laurier also joins the Fairmont **Banff Springs**, the Fairmont **Empress in Victoria**, the **Ritz-Carlton** in Montreal and the Fairmont **Chateau Frontenac** in Québec City, ranked among the best Canadian hotels by *Travel and Leisure* magazine.



The **Travellers' Aid Society of Toronto**, a "one of a kind" in Canada, celebrates its Centennial this year. Travellers' Aid volunteers (some with more than 20 years service) now greet nearly 400,000 travellers and visitors annually, from five booth locations in the city. While the needs of travellers have changed over the years, the Society changed to meet the challenges of the day, dealing with everything from changes at airport and railways terminals which may overwhelm visitors, to bank card failures, to emergency accommodation.



The **Tourism Industry Association** in the U.S. is lobbying for the introduction and passage of legislation to "establish a public-private partnership to brand, position, and promote the U.S. as the world's premier travel destination." The U.S. is currently the only western industrialized country without a national entity (like the Canadian Tourism Commission) to promote international visitation. Proponents of the plan believe that such a partnership is the U.S. tourism industry's best hope of reversing "the decline of international visitors that has occurred over the past decade and replacing the hundreds of thousands of jobs that have been lost since the fall of 2001."



Karl Schutz, originator and architect of the Chemainus Mural Project and founder of the **Arts &**

**Cultural Accord**, has a laudable, if lofty, goal. His organization is reaching out to artists and arts organizations to register on [www.theartsandculturalhighway.ca](http://www.theartsandculturalhighway.ca) with the goal of making arts and tourism the number one industry in British Columbia.



According to a new study by the Travel Industry Association of America (TIA) ([www.tia.org/Pubs/pubs.asp?PublicationID=97](http://www.tia.org/Pubs/pubs.asp?PublicationID=97)), **single households** account for 32 percent of all U.S. households and generate 27 percent of all domestic trips. TIA's study also



The Jack Pine (1916-1917) by Tom Thomson. Photo: courtesy of Musée du Québec.

A major retrospective of the work of Canadian landscape painter Tom Thomson (1877-1917) has been organized and is being circulated by the National Gallery of Canada. It is at the Musée du Québec in Québec City until May 4.

compares the travel characteristics of singles to two other life stage groups: couples and parents.



According to the Halifax Chronicle Herald, **cruise-ship passenger counts** have increased by more than 340 percent from just over 47,000 in 1998 to about 160,000 in 2002. The largest cruise line companies in the world are regular customers of ports in Nova Scotia such as Halifax and Sydney; on average each passenger spends about \$95 on shore. In 2002, that equated to more than \$16 million to the local economy.



Statistics from China National Tourism Administration (CNTA) show that travel expenses on **business trips by Chinese** exceeds \$2.4 billion USD per year and is growing at an annual rate of 20 percent.



**Tourism British Columbia** has been recognized as one of the Best Companies to Work For in B.C. according to a survey conducted by Watson Wyatt Management Consultants. Rose Moss, a spokesperson for Tourism B.C., says that her organization understands the importance of providing a positive and

Partnership Corporation and was developed following consultations with a wide range of northern tourism representatives.



The impact of climate change on tourism destinations, and adaptation to these changing conditions, will be the topic of the first **International Conference on Climate Change and Tourism**, to be held in Tunisia in April. The tourism sector is facing the challenges of climate change, the impacts of which are already visible and felt locally at many tourism destinations, especially coastal zones, mountain regions, and drought and flood-prone areas. [www.world-tourism.org/sustainable](http://www.world-tourism.org/sustainable).



Travel Alberta and Tourism B.C. have announced an improved three-day format for **Canada's West Marketplace 2003**. This year, buyers will be seated and sellers will move booth to booth for appointments. Alberta tourism suppliers will conduct appointments over one-and-a-half days. [www.tourismtogether.com](http://www.tourismtogether.com).



According to the Halifax Chronicle Herald, the publisher of a **tourism guide for motorcyclists** "is revved up about two-wheel travel possibilities" in Nova Scotia. Harold Nesbitt of Waverley said response to the first two editions of *Motorcycle Tour Guide Nova Scotia* bodes well for hotel and hospitality operators ready to "welcome baby boomers prowling the province's countryside atop Harleys and Gold Wings."



**Rural Expo 2003** will take place in Carleton Place, Ontario from September 17-21, 2003. Approximately 80,000 people are expected to attend the five-day event. The 11-member museums of the Lanark County Museums Association have received funding from the Federal and Provincial governments to develop a travelling exhibition. 🍁



The Ontario government is investing in a new delivery model, as well as up to \$6.8 million, to **enhance northern tourism marketing efforts**. The new model integrates northern tourism marketing with the Ontario Tourism Marketing



**Erin Van Zant** has joined Victoria's Hotel Grand Pacific as director of human resources. Van Zant has spent the last 12 years in the B.C. Provincial Government, most recently in the personnel services division of the Ministries of Attorney General, Public Safety and Solicitor General.

**Jurgen Ludwig** has been engaged as acting general manager at Poets' Cove on Pender Island in B.C. He is joined by **Glenn Monk** as director of food and beverage, and **Jonathan Dunn** as the marina and resort activity director.

CHIP Hospitality has appointed **Richard Boutet** as the company's regional vice-president of operations for the province of Quebec. Boutet is GM of CHIP's Delta Montréal property and brings more than 20 years of experience in the industry to his new position.

**Emory Haines** has joined Victoria's Hotel Grand Pacific as director of food and beverage. Haines moves to Victoria from Vancouver where he has been instrumental in the success of the Restaurant DIVA at The Metropolitan Hotel.

Rocky Mountain Railtours (RMR) has appointed a number of new departmental directors. **Heather Metcalfe** is now director of product operations, joining RMR from Canada 3000 Holidays where she was director of operations.

**Rosemary Casson** is the new director, North American Sales (Tour Operators), joining RMR from R.C Events and Sunflight. **Larisa Zenjin** is now director of U.S. Travel Agency Sales; she had joined RMR in 1996. **Lisa McCaskill** has become director,

Asia Pacific & Latin American Sales. **Marilyn Stecko** has been appointed Group Sales manager, and **Janet Stewart** has moved to the position of director, Product Buying.

The Shaw Festival announced the appointment of **Thomas Hyde** of Buffalo, New York as the new chair of the Shaw Festival Theatre Foundation Board of Governors. Hyde practises with Hodgson Russ, LLP, Buffalo's oldest and largest law firm.

**Tracey Bell** has recently joined Tourism Regina as director of sales for Bid Regina. She moves to her new position from Calgary where she held positions with Tourism Calgary and The Westin Calgary.

**Kimberly Lyall** has been appointed general manager for Chinook Country Tourist Association, where she has been marketing and public relations coordinator for the past two and a half years. Lyall is also the regional representative to the Department of Canadian Heritage for Celebrate Canada Alberta.

**Brent Ritchie**, chair of the University of Calgary's World Tourism Education & Research Centre, has been elected as the inaugural chair of the World Tourism Organization's recently established Tourism Education Council.

**Mark Nichols** has been appointed director, business sales at Tourism Calgary. He has been involved in hospitality sales for the past 18 years, most recently as director of sales and marketing for the Delta Bow Valley Hotel in Calgary.

**Jason Knibbs** has joined Grouse Mountain Resorts as sales manager, tour & travel. Prior to joining Grouse Mountain, Knibbs was

sales and marketing manager for Vancouver Harbour Cruises & Events. 🍁

## Cultural tourism – from coast to coast!

Sylvie Nadeau, Cultural Tourism Chair for the Canadian Tourism Commission's Product Development Committee, has named six new members to her working group, for a total of 16. The new members are Anna Kovachis (Kingston, ON), Darrin White (NWT), Marie G. Lalonde (Toronto ON), Lise Lambert (Québec), David Lough (St. Johns, NL), Kevan Ridgway (Vancouver, B.C.).

(Canadian Heritage, Hull, Quebec), Wayne Burley (Fredericton, N.B.), Marie-France Doucet (Bouctouche, N.B.), Donna Dul (Winnipeg, MB), Racelle Kooy (Ottawa, ON), Frank Laflèche (Canadian Embassy in Washington, D.C.), Margot Rumley (Halifax, N.S.), Wendy Swedlove (Ottawa, ON), and Linda Wedman (Edmonton, AB).

Committee Secretary is Ernest Labrègue (CTC). For more information: [labrègue.ernest@ic.gc.ca](mailto:labrègue.ernest@ic.gc.ca) 🍁

Other members of the culture sub committee are Jean-Yves Cayen



Rod Harris

## Tourism Profile

To keep our readers informed about key decision-makers in Canada's tourism industry, *TOURISM* is introducing members of the Canadian Tourism Commission's (CTC) Board of Directors and committees. Each profile highlights the personal vision of these industry leaders as they voice their opinions on important issues facing the tourism sector.



**Rod Harris** is the British Columbia and Yukon public sector representative on the Canadian Tourism Commission's (CTC) Board of Directors. He is also a member of the Audit Committee of the Board. He has had a varied background in which to apply his marketing expertise, having been employed in a senior capacity with a variety of multinational corporations including British Columbia Packers, Colgate-Palmolive and John Labatt. He holds a Bachelor of Commerce and a Master of Business Administration from the University of British Columbia.

Harris was appointed to his current position as president and chief executive officer with Tourism British Columbia in 1996. He feels that it is of the utmost importance that the CTC works effectively with key partners, including large and small tourism operators as well as the provinces and territories, with the goal of combining scarce resources to showcase Canada on the world stage.

Harris feels the CTC must effectively engage Canada's transportation sector (including air carriers, rail, and marine operators) to attract and carry increasing numbers of visitors. This will mean developing effective and accountable marketing programs that fill accommodation properties, restaurants and attractions throughout the country. And – he wants to encourage the finest talent to work for the Canadian Tourism Commission! 🍁

## Looking for that special someone?

Tourism businesses and organizations engaged in national-level searches for management personnel are invited to use *TOURISM* in one of two ways. We will be pleased to include a complimentary one-sentence listing in the *PEOPLE* section. Organizations may also wish to contact *TOURISM* publisher about placing a detailed *CAREERS* notice in the magazine. He can be reached at [gaudreault.ghislain@ctc-cct.ca](mailto:gaudreault.ghislain@ctc-cct.ca). 🍁

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For further details and registration:

[www.canadatourism.com/roadshow](http://www.canadatourism.com/roadshow)

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