



Explorez sans fin
CANADA
Keep Exploring



Road Show : Differentiating Canada

Leveraging our collective voice

The Canadian Tourism Commission



Explorez sans fin
CANADA
Keep Exploring

CTC Leadership Role

- Expert on the Canadian tourism product and services
- Promoter of Canada brand ***Canada – Keep Exploring***
- World class research capacity
- Leading source of information
- Lead all other National Tourism Organizations in leveraging technology and the Internet.



Explorez sans fin
CANADA
Keep Exploring

Key Challenges

Rank	1950	World Share	1970	World Share	1990	World Share	2005	World Share	
1	USA	71%	Italy	43%	France	38%	France	32.7%	
2	Canada		Canada		USA		Spain		Spain
3	Italy		France		Spain		Italy		USA
4	France		Spain		Italy		China		Italy
5	Switzerland		USA		Hungary		Italy		
6	Ireland	17%	Austria	22%	Austria	19%	UK	14.1%	
7	Austria		Germany		UK		Mexico		Germany
8	Spain		Switzerland		Mexico		Germany		Turkey
9	Germany		Yugoslavia		Germany		Austria		
10	UK		UK		Canada				
11	Norway	9%	Hungary	10%	Switzerland	10%	Canada	9.3%	
12	Argentina		Czech		Greece		Malaysia		
13	Mexico		Belgium		Portugal		Poland		
14	Netherlands		Bulgaria		Malaysia		Hong Kong		
15	Denmark		Romania		Croatia		Hungary		
	Others	3%	Others	25%	Others	33%	Others	43.9%	
Total	25 million		166 million		703 million		808 million		



Explorez sans fin
CANADA
Keep Exploring

Strategy

STRATEGIC PLAN 2007-2011



Explorez sans fin
CANADA
Keep Exploring

Introduction

- Builds on the foundation set in 2006-2008
- Brings clarity and focus to existing CTC directions
- Defines our common agenda for the next five years



Explorez sans fin
CANADA
Keep Exploring

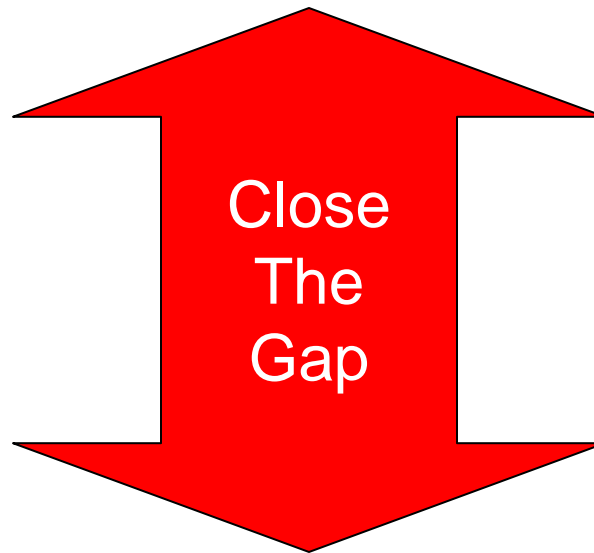
***Reposition Canada as a
destination where travellers can
create extra-ordinary personal
experiences***



Explorez sans fin
CANADA
Keep Exploring

Closing the GAP

#3 Nation Brand
#2 Place to Live (U.N.)



#11 Place to Visit (UNWTO)



Explorez sans fin
CANADA
Keep Exploring

Plan at a Glance

GOAL: Grow Tourism Export Revenues

- Objectives (4)
- Priorities (7)
- Outcomes



Explorez sans fin
CANADA
Keep Exploring

Objectives

- 1) Convert high yield customers;
- 2) Focus on markets of highest return on investment;
- 3) Brand consistency;
- 4) Research new market opportunities.



Explorez sans fin
CANADA
Keep Exploring

Priority #1: Develop one-to-one relationships with customers

- Learn more about the customer
 - Explorer Quotient
 - Consumer Research
 - Customer Relationship Management (CRM)
- Create a valuable online experience
- Convert interested visitors into customers



Explorez sans fin
CANADA
Keep Exploring

Priority #1: Develop one-to-one relationships with customers

The Explorer Quotient Model-EQ

A research/web based tool that segments travellers by their travel values

- Position idea of exploration with Canada
- Truly understand customers travel motivators and present them with refreshed product that meets their specific needs
- Grow databases for partnerships
- Overlay EQ data with demographic and geographic data for improved outbound marketing
- Re-position, re-package and react more quickly to changing consumer needs



Explorez sans fin
CANADA
Keep Exploring

Priority #2: Align market allocations for maximum return on investment (ROI)

- Budget reallocation to take advantage of growth markets
 - Mexico, China, South Korea and Australia will increase in 2007
- Establish a \$1.2 million Research and Development fund
- Explore new market opportunities



Priority #3: Differentiate Canada

- Many destinations are competing for the tourist's dollar.
- Canada needs to stand out — not just be a major competitor but strive to be a traveller's first choice.
- Promoting a consistent brand
Canada will differentiate Canada from its competitors.



Explorez sans fin
CANADA
Keep Exploring

Priority #4: Leverage Partner Investment

- Partnerships are essential to extend marketing reach with limited resources.
- Seek to leverage partnerships to maintain an average 1:1 ratio.
- Continue to build partnerships with non-traditional partners who support strategic objectives.



Explorez sans fin
CANADA
Keep Exploring

Priority #5: Create demand for increased air access

- Air access is critical to converting high yield customers.
- Without adequate air access Canada is limited in its ability to increase tourism export revenues.
- Work with partners to create demand.



Explorez sans fin
CANADA
Keep Exploring

Priority#6 Organizational Excellence

- Two main assets: People and the Canada Brand
- Canada.Keep Exploring – commitment to Canada and finding new ways to do things
- Core values

Innovation, Collaboration & Respect



Priority #7: Leverage media exposure afforded by 2010 Olympics

- Unprecedented opportunity to showcase Canada
- Canadian images and stories to drive demand for tourism product
- CTC will use the Games to leverage, accelerate or enhance existing activities



Explorez sans fin
CANADA
Keep Exploring

Ultimate Outcome

**Export revenues increase
annually by 4.5% to \$19.8
billion by 2011**



Strategic Outcome

- **Canada has moved up from #11 on UNWTO**
- **Awareness levels of the Canada Brand have increased**
- **Market yield has increased by 4.6% to \$120.4 per day**
- **Partnership ratio maintained at 1:1**
- **Employee satisfaction remains constant and/or increased**



Explorez sans fin
CANADA
Keep Exploring

E-Marketing & Customer Relationship Management

Jens Thraenhart
Executive Director
Marketing Strategy & CRM



The Market

82% of Travelers use the Internet to research or book travel

Ways that US Online Consumers Use the Internet to Research and Book Summer Travel Arrangements, May 2006 (% of respondents)

Research travel arrangements online, but do not book online

31%

Book travel arrangements through online travel sites

30%

Book travel arrangements on the Web site of a hotel or destination

21%

Source: Prospectiv, June 2006



Explorez sans fin
CANADA
Keep Exploring

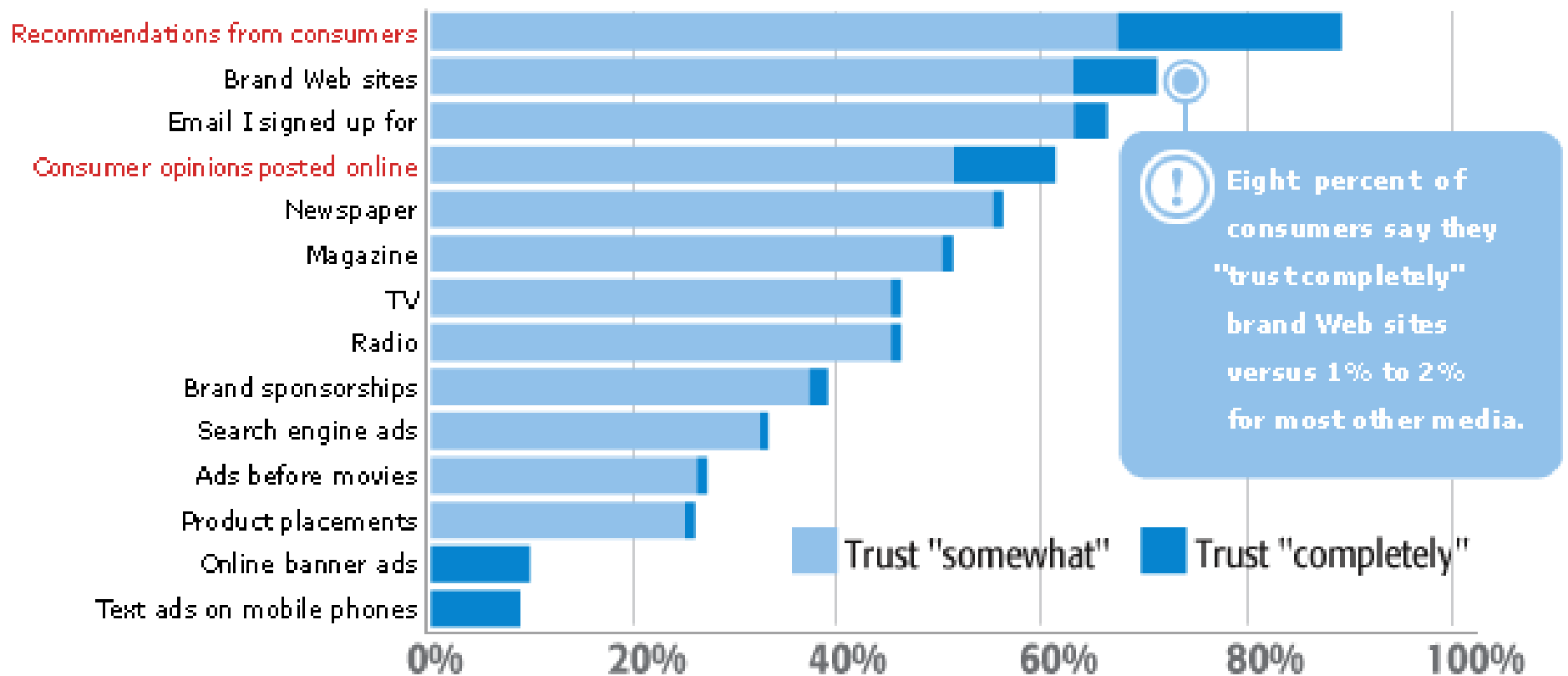
FRAGMENTED TRAVEL PROCESS





Explorez sans fin
CANADA
Keep Exploring

WHO DO YOU TRUST?



THE ROLE OF THE CTC

Existing and new customers are experiencing another touchpoint of the “Brand”

Strategic focus for CTC e-Marketing:

- Content Distributor
(global platform, integrating other channels)
- Lead Generation
(sales/distribution via direct connects for suppliers)
- Relationship Management
(campaigns, web analytics, personalization)
- Brand Management
(consistent message to communicate Canada brand)
- Leadership Position
(dot travel, education, change management)



Explorez sans fin
CANADA
Keep Exploring

UK slow to sign up to dot travel

Britain risks being left behind on new domain

REPORT BY IAN TAYLOR

TRAVEL organisations are signing up to the Internet domain name dot travel at the rate of 1,000 a week - but those in the UK risk being left behind.

The fears were raised by the Tralliance Corporation, which operates the registry. It warned take-up in the UK has proved slower than elsewhere.

Ron Andruff, president and chief executive of Tralliance and the dot travel registry, said it could take five years for the name to become the industry standard, but argued companies that adopt early would have an advantage.

The registry was launched in January.

He said the priority rights to dot-travel names would expire at the end of this month. Despite this, UK organisations were failing to sign up. He said: "It's not happening. For Britain not to claim its sites is crazy. Not enough people recognise what this is going to be."

Andruff said: "It's a way to cut information overload and remove the ills of the Internet, such as cyber-squatting.

"Travel is the most searched category online,

but the clutter and lack of relevance stop people finding what they want."

He conceded the growth of dot travel is unlikely to continue at the current pace.

"It could take four or five years to get most industry names on board. We're not going to announce the number of names we have every few weeks."

Andruff added: "Domain names will come in sooner or later. Companies are lost in the online anonymity of dot com or co.uk."

It is likely domain names will designate the type of content or business on sites generally - with names such as 'dot museum' for museums or 'dot xxx' for porn sites.

The dot-travel directory can be searched in 10 languages, including Mandarin Chinese, said Andruff.

Registration costs from \$100 to \$250, following a free process of authentication as a legitimate travel business.

"Travel is the most searched category online, but the clutter and lack of relevance stop people finding what they want"

Canada shows the way

THE CANADIAN Tourism Commission could provide a model for organisations considering adopting the dot travel domain name.

The commission has created a Canada dot travel website for consumers after paying about US\$100 a time to register the names of almost 100 Canadian destinations and attractions that it believes may want the domain name in future.

The commission's executive director of strategic marketing Jens Thraenhart said: "This is about more than a domain name, it's about bringing relevancy to consumers. Everything will be on one platform, where before there were 50 websites, each managed separately."

The commission will demonstrate its model to the industry and will offer it to destinations in North Africa and the Middle East at a dot travel forum in Cairo in June.

Thraenhart said: "We want to protect the integrity of the concept by encouraging others. But it's not just about the name, it's about marketing all the small tourism players."



www.search.travel - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address http://search.travel/travelsearch/ Go

Trex Search Trails

www.search.travel^{beta}

home destinations activities travel agents/tour operators lodging cruises transportation restaurants media

Search: GO

If you are a travel services provider,
Don't know why your .travel domain is

featured .travel site



explore.canada.travel

about

Only authorized
Tourism Services
permitted to
Domain Name
that we
www.explore.canada.travel
www.futurevac.com
authentic and
trust because
through
Authentic

*TRALLIANCE [08/16 to 08/16] - Microsoft Internet Explorer


File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address http://media.vmsnews.com/MonitoringReports/081606/644545/1000722693/ Go

Trex Search Trails





Ready

Print Help

North American Markets

- Good Morning Arizona At 6 AM** DMA: 14
KTVK-TV CH 3 (HD) Phoenix Media Value: \$ 407
08/16/2006 06:00 AM - 07:00 AM Est. Audience: 66,140
 Available formats: DVD, CD, digital link, videotape, transcript, NewsBoard

00:16:51 TZ; Web site: A vacation site debuts on the web today. **Search Travel** has launched its search engine today. GR; **Search for Travel**, look for **travel TV**; **Search Travel** web site. It bills itself as a consumer site. Web sites with **.travel** will be given priority because they have been authenticated. 00:17:17

Now Playing

QuickView video is available for 21 days from airdate. Material supplied by VMS may be used for internal review, analysis, or research only. Any editing, reproduction, publication, rebroadcasting, public showing, public or internet display is forbidden and may violate copyright laws. Any audience data contained in VMS reports are the copyrighted property of Nielsen Media Research, Inc. All Rights Reserved. Media Values are based on the value of 30 seconds of time as measured by SOAD. © Copyright 2005 Video Monitoring Services of America, LP. All rights reserved.

***TRALLIANCE**
08/16 to 08/16

(C) Derived from: Closed Captioning; Interview; LiveGraphic; PC=Phrase Conference; IR=Reader; SP=Studio Interview; Tr=Teaser; TS=Teased Segment; V=Visual

Done Internet

start Microsoft Outlook We... *TRALLIANCE [08/16... CTC Roadshow 2006 ... 8:09 AM



Explorez sans fin
CANADA
Keep Exploring

DOT TRAVEL INITIATIVE

CONSUMER

- Authentication
- Relevance
- Trust & Confidence
- Ease of Use

INDUSTRY

- Global Reach
- Search Engine Optimization
- Link Popularity
- High ROI

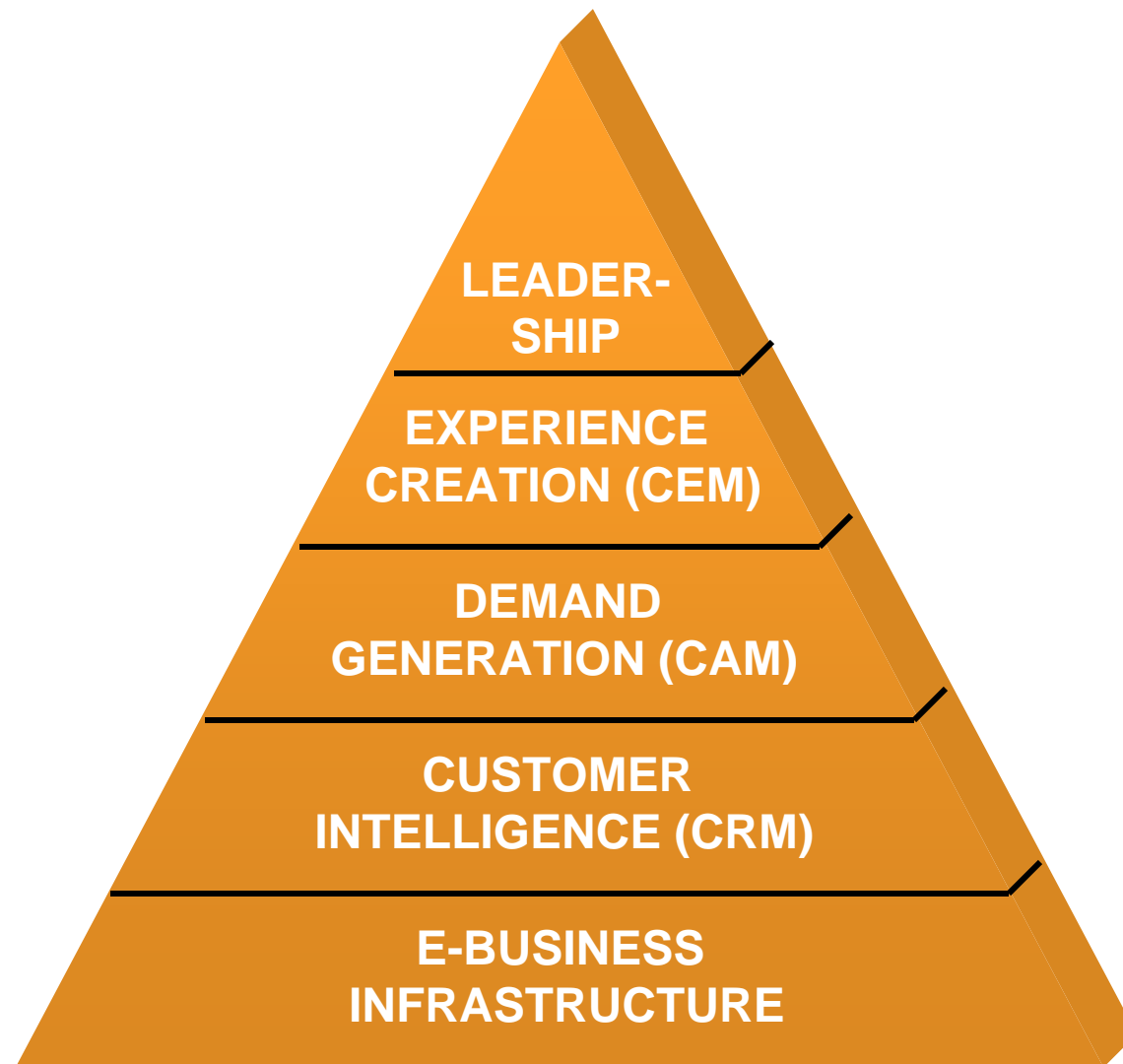
STEPS:

1. Authentication
2. Registration
3. Activation
4. Directory
5. Usage
 - a. Communication
 - b. Web Platform
 - c. Email
 - d. Campaigns



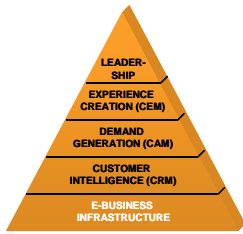
Explorez sans fin
CANADA
Keep Exploring

E-MARKETING PYRAMID





Explorez sans fin
CANADA
Keep Exploring



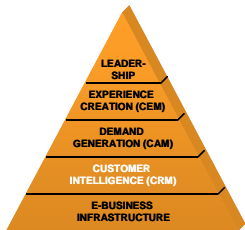
E-BUSINESS INFRASTRUCTURE

To employ a solid E-Business infrastructure that allows for content management and data management on one global platform to achieve cost savings, efficiencies, and flexibility in order to create one-to-one relationship with customers.

- Centralized Hosting
- Global Content Management
- Digital Asset Management
- Brand Asset Management
- Customer Database Consolidation
- Sales Force Automation
- Personalization



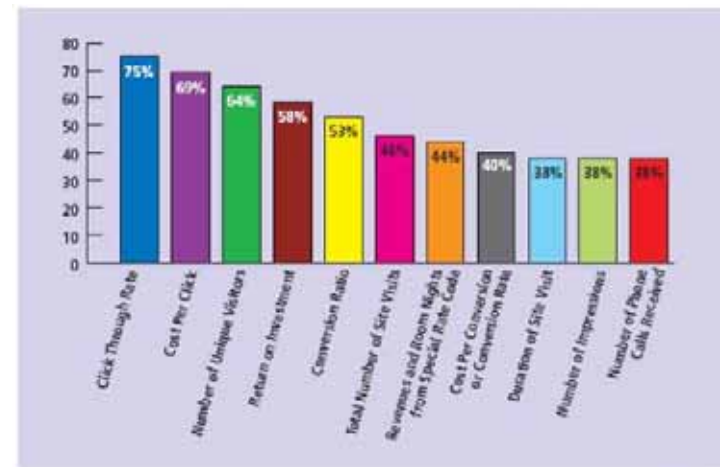
Explorez sans fin
CANADA
Keep Exploring



CUSTOMER INTELLIGENCE

To turn customer data into intelligence so it can be leveraged to create targeted and personalized campaigns, which lead to a meaningful and mutually beneficial relationship between industry and consumer.

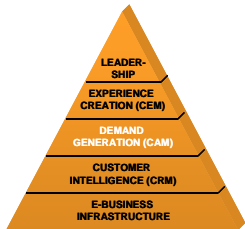
- Consumer Campaign Measurement
- Consumer Data Analysis
- Consumer Cluster Overlays
- Consumer Segmentation
- Consumer Privacy
- Consumer Trends



Source: Online Marketing Strategies in the Travel Industry (NYU/PhoCusWright Inc.)
Note: Respondents were asked to check all that apply.



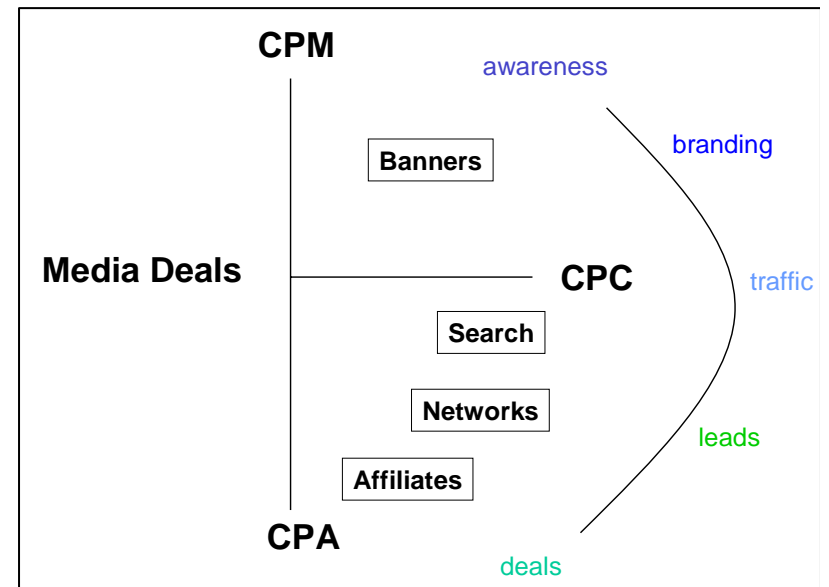
Explorez sans fin
CANADA
Keep Exploring



DEMAND GENERATION

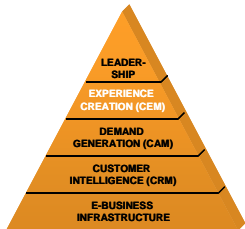
To drive most relevant and targeted traffic most cost effectively to CTC web properties (Canada.travel portal) by leveraging consumer intelligence, and automated campaign management.

- Automated Campaign Management
- Domain Name Management
- Search Engine Marketing
- Online Advertising
- Affiliate Marketing
- Content Syndication
- Viral Marketing
- Social Networking
- Mobile Marketing





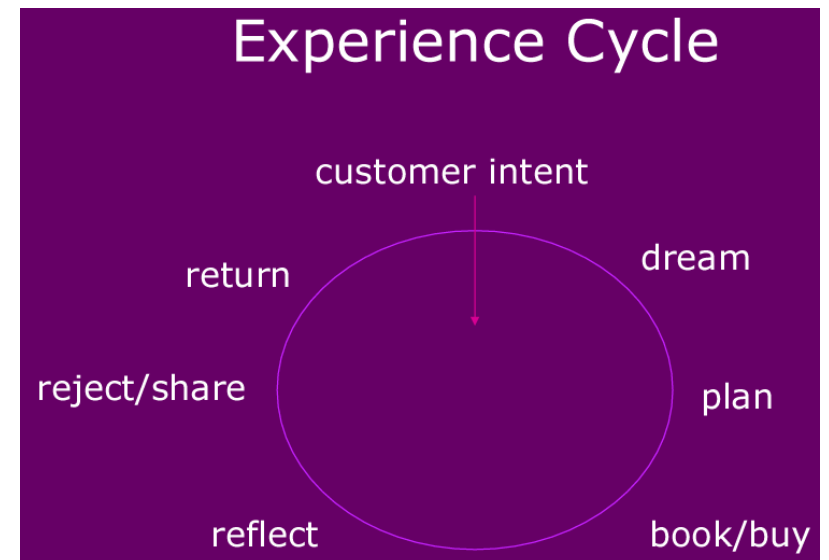
Explorez sans fin
CANADA
Keep Exploring



EXPERIENCE CREATION

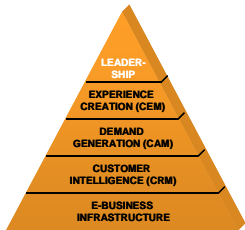
To create a most valuable online experience that excites consumers to travel to Canada (lead generation to industry) and creates an environment for data capture.

- Destination Content
(including Mapping, Travel Planning Tools, Multi-Media, e-Brochures, Globalization)
- Personalization
(includes Loyalty Program, EQ)
- Marketplace Directory
- Community Blogs
(User-Generated Content)





Explorez sans fin
CANADA
Keep Exploring



LEADERSHIP

- Positioning
 - Dot Travel
 - Public Relations
- CTC Change Management
 - Training & Education
 - Cross-functional teams
- Industry Collaboration
 - E-Marketing Task Force
 - Content & Application Sharing
- Education
 - Canadian Online Travel Conference
 - CTC E-Marketing Summits

To position the CTC as an innovator in e-marketing and customer relationship management through industry positioning and education in order to gain credibility and strategy buy-in from industry with a goal to market Canada globally as one country by leveraging the Internet and technology most effectively of all National Tourism Organizations globally.



CANADA
Keep Exploring

CENTRALIZED CANADA.TRAVEL PORTAL STRATEGY



CONSUMER

MEETINGS

CANADA.TRAVEL



CORPORATE

PRESS





Explorez sans fin
CANADA
Keep Exploring

Build **One-to-One Relationships**
to get a better customer understanding
and control marketing effectiveness
in order to **compel the world to explore Canada.**



Canada

Gisele Danis
Executive Director
Brand, Canada & PIE



Explorez sans fin
CANADA
Keep Exploring

Canada Marketing Program

***Igniting Canadian Pride
to
Choose Canada NOW!***



Program Overview

- **Key markets: Vancouver, Toronto, Montreal**
- **High-yield customers, HHI \$80K+**
- **Conversion – “Switch Habits”**

Why?

- **38% of out-of-province travel by Canadians is heading south on a vacation**
 - **this number has climbed from 12.7M overnights in 2003 to 14.9M in 2005**
 - **Results: Highest Travel deficit in 10 years – 5.5 billion.**



Explorez sans fin
CANADA
Keep Exploring

Challenge?

Canadians Perception of Canada



Explorez sans fin
CANADA
Keep Exploring

Research – Focus Groups

- *“I don’t feel I can treat myself and splurge in my own country....”*
- *“I don’t feel I can have new experiences in Canada...experience the unknown”*
- *I don’t feel I can learn how others live/enjoy life”.*



Explorez sans fin
CANADA
Keep Exploring

Challenges

- **Strong Canadian dollar**
- **Greater competition**
 - >More affordable elsewhere
- **Micro-segments target audiences are becoming more niche & specialized**
- **Travellers thirsting for knowledge and new experiences**
- **Canadian Travel behaviours Changing**
 - >Last minute shoppers.



Opportunities

- Identify our customer
(Target 2 EQ profiles)
- Create alliances and work with non-traditional and traditional partners.
- Deliver on Brand promise



Identify Customer

Primary (through 2009)

- 1. Authentic Experiencers**
- 2. Cultural History Buffs**

Secondary (expand through 2011)

- 1. Heritage Connectors**
- 2. Cultural Explorers**

Identify our Customer

Before

- Adults 35+ - bulls eye 44+
- HHI \$ 80K+
- Post Secondary Education +
- Mode of transportation
 - Primary: travel by car
 - Secondary: travel by air
- Primary leisure holiday (not business or visiting friends or relatives)
- Key markets: Toronto, Montreal, Vancouver

Now

- Social Values
- Travel Motivators/Behaviours
- What do they seek in a vacation.
- Lifestyle Overview
- Retail Shopping habits (food, retail, grocery, banks, books, TV, furniture, clothing, home improvements, sports etc...)
- Research

Create Alliances

Speak directly and be more relevant to target audiences.

For example:

- Expanded partnership with non-traditional partners.
- Traditional PMO's DMO's
- Media Fams
- E-strategy and Blogging
- National Photo contest
- Content generator “wow”/ “did you know”



Explorez sans fin
CANADA
Keep Exploring

Creative Approach

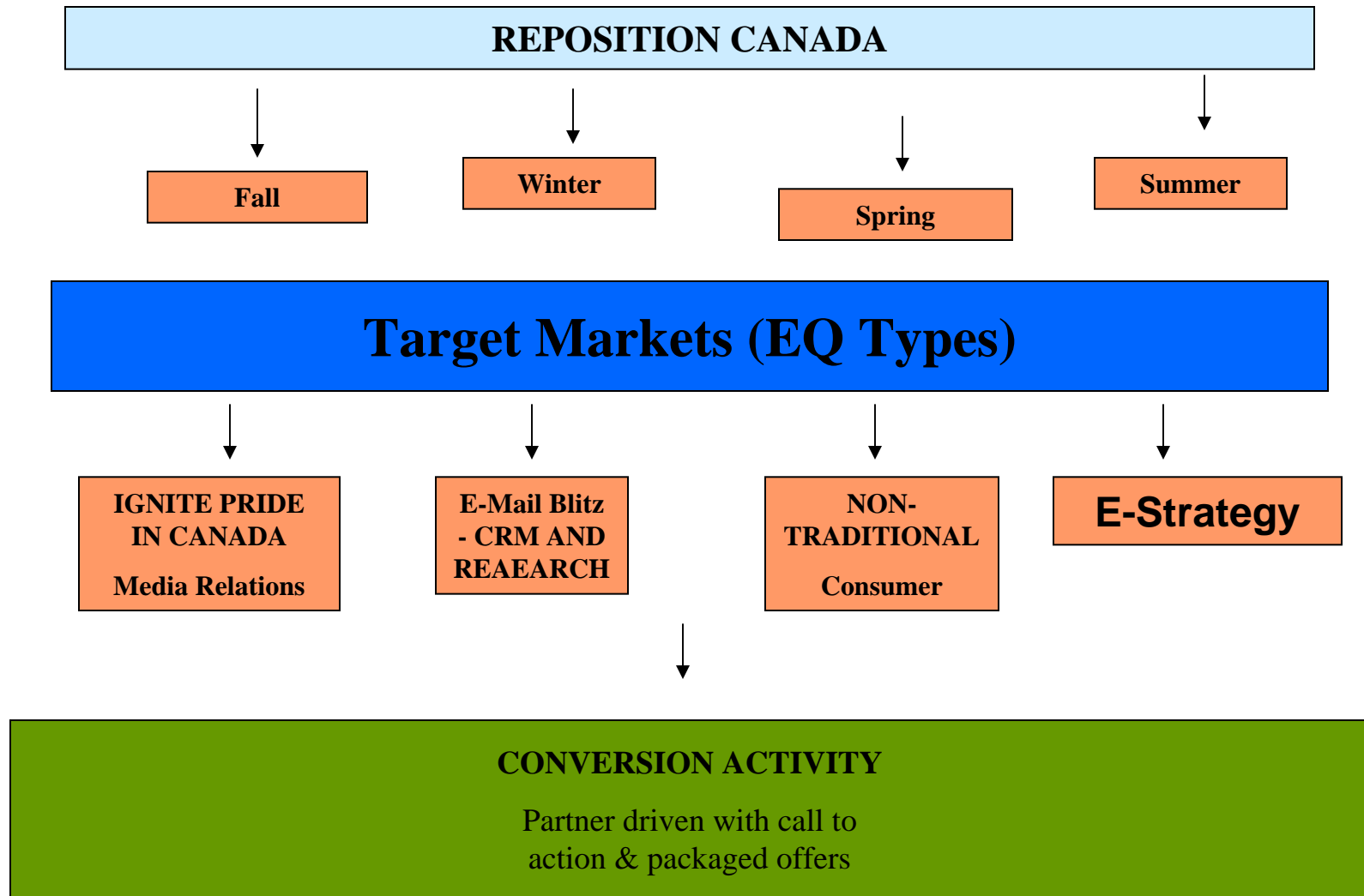
People talking to People

“blogging, endorsements by others etc...”



Explorez sans fin
CANADA
Keep Exploring

Marketing Approach





Explorez sans fin
CANADA
Keep Exploring

The Potential

- *“Wow, I didn’t know you could do this in Canada”*
- *“This definitely does not feel like Canada – why didn’t anyone tell me I could do this here?”*
- *“What a feast...I didn’t know we could eat like this...this feels like New York”*

Vancouver visitors comments, August 2006



Explorez sans fin
CANADA
Keep Exploring

In Closing...

- **Non-Traditional**
- **SME's. (Content generator)**
- **Research**



US Leisure

Siobhan Chrétien
Executive Director
US Marketing



Explorez sans fin
CANADA
Keep Exploring

2006 Results

YTD July Share International Travel Volume	# of travellers July YTD
86%	16,914,317 (-8.8%)



Explorez sans fin
CANADA
Keep Exploring

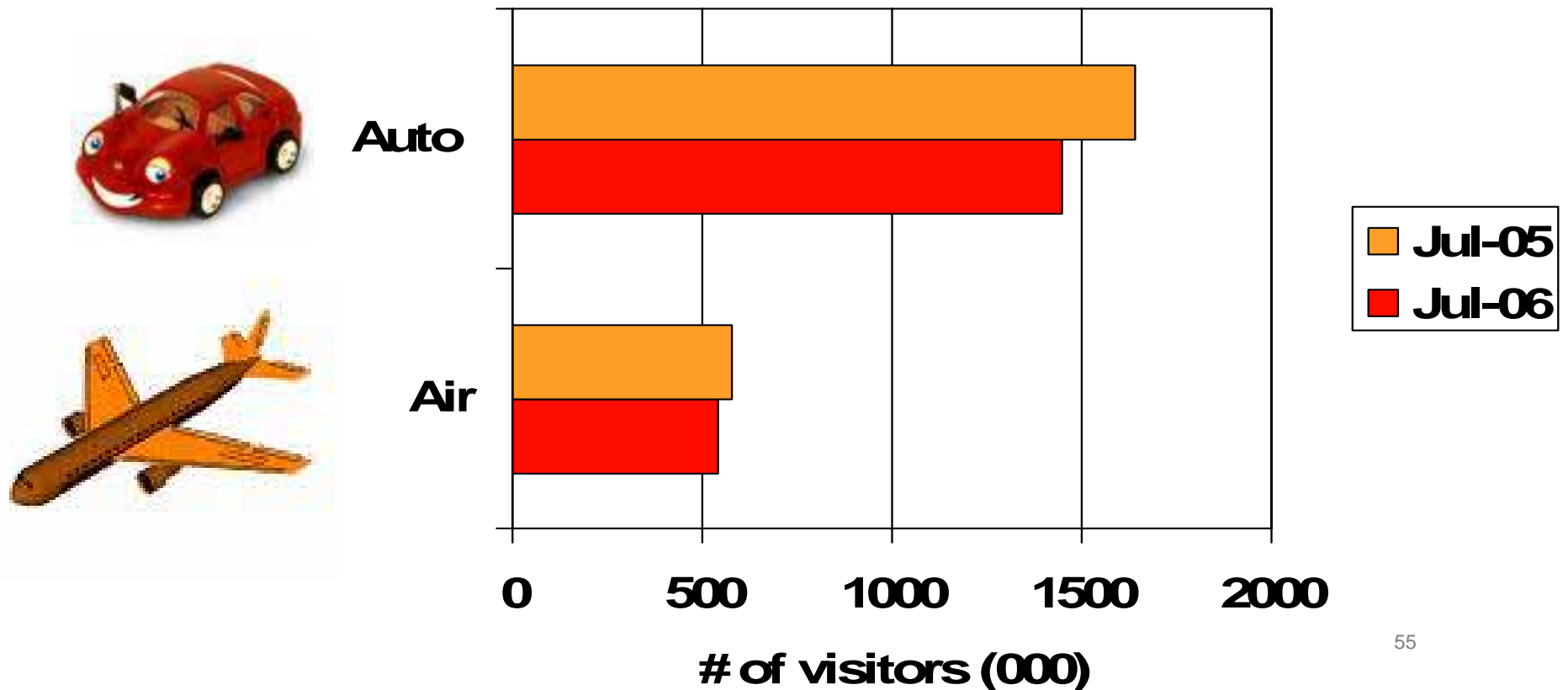
Program Overview: US Marketplace

- **Canada is experiencing a fundamental shift in traditional travel traffic from the US**
 - Macroeconomic factors – exchange rate, price of oil, WHTI, passports etc.
 - Internet – the customer is now in charge, transparent world
 - Greater competition
 - Lack of compelling reason to visit

Context: Recent marketplace results

July 06 vs. July 05:

- Plane arrivals down 6.3%
- Auto down 11.7%



Note: Not seasonally adjusted.

Challenges

- Low brand recall = awareness gaps
- Core travel drivers score low
- Industry alignment to maximize resources
 - Ability to deliver in-demand experiences
 - Resources, time, relationships
- Capturing the travel pool of the future
- Macro environment (WHTI)

Opportunities

- US outbound all time high, air capacity
- Mid & southern markets -fewer barriers
- CTC markets show incremental gain
- Current Canada customers
- Business Intelligence
- Partnership

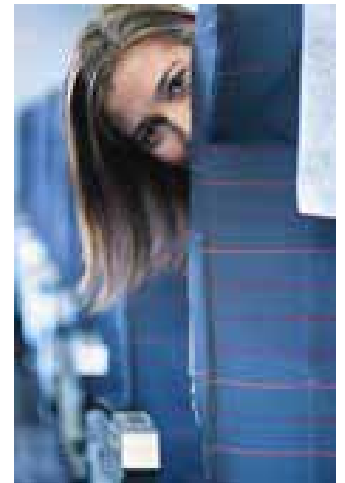
"GENERATION C"



Key Trends

- Consumer-driven content
- Paying for placement
- Females are the “planners”
- Luxury trips, Edu-travel, Micro-Segments, Guilt travel, Stopovers
- Women Only, Multi-Generational
- Teenage Travel, Insider Experiences

Reposition the Experience!





Explorez sans fin
CANADA
Keep Exploring

Objectives

- Generate the greatest return on investment /
Target through segmentation the high-yield travellers
- Convert high-yield customers/ **Increase**
consideration for Canada as the destination of choice,
lead the customer down the path to purchase
- Create Brand relevancy/ **Integrate and consistently**
communicate Brand Canada/ differentiate
- Generate Marketing and Business intelligence/**Add**
value through pilots and integrated partnerships,
eMarketing leadership

Outcomes: Increase tourism export revenues

Strategic Focus: Relevance 2007-2010

- **Who we say it to & how**

- **Be relevant to the right travellers.**
Develop horizontal strategies that utilize the extensive research data on yield, activity, motivations, and experiences to deliver a more targeted and efficient message. This includes new and existing vertical niche markets.



Knowing the Competition

- **\$645 billion a year travel industry, remains primarily a domestic one, with Americans taking 1 billion domestic trips of which 77% are for leisure purposes.**

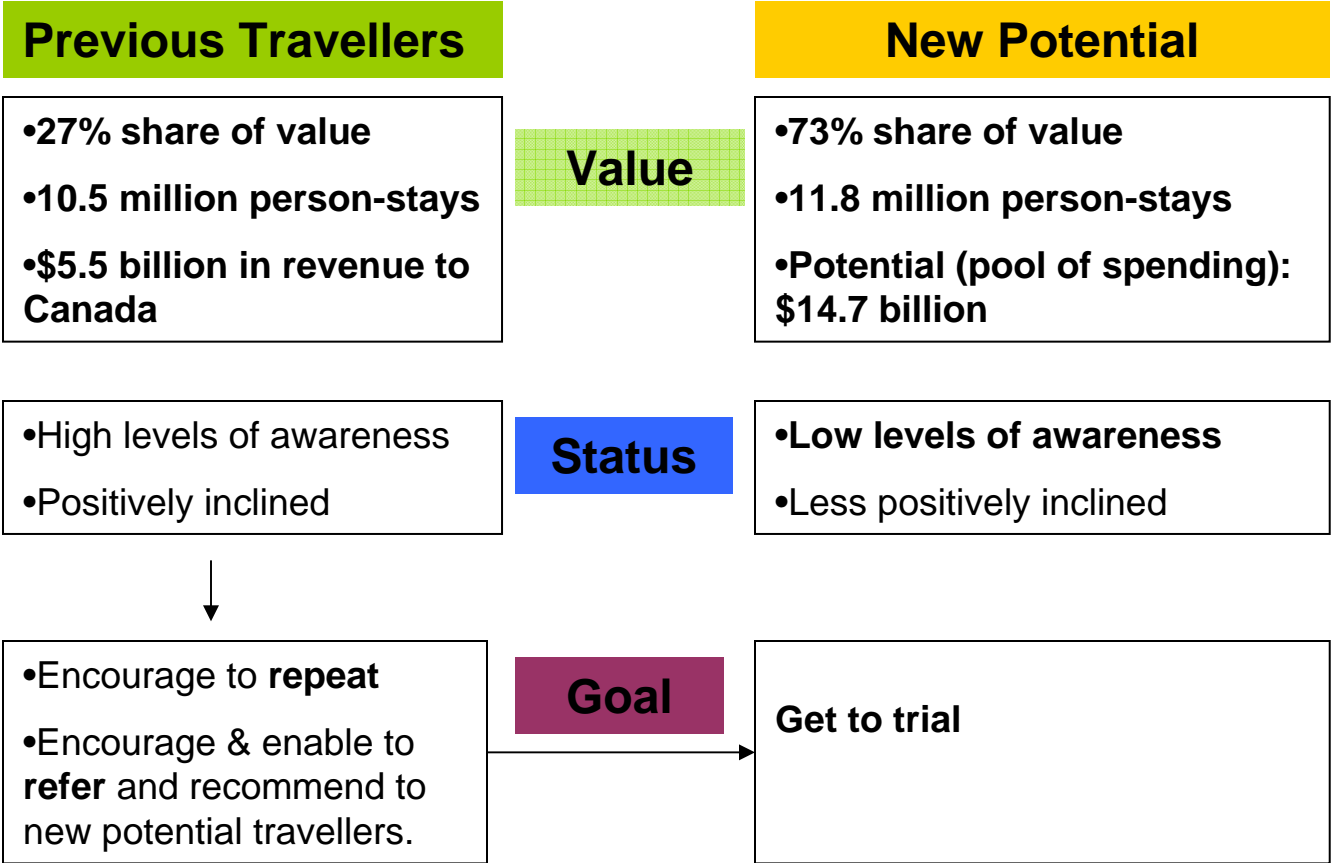


Approach: US Strategy

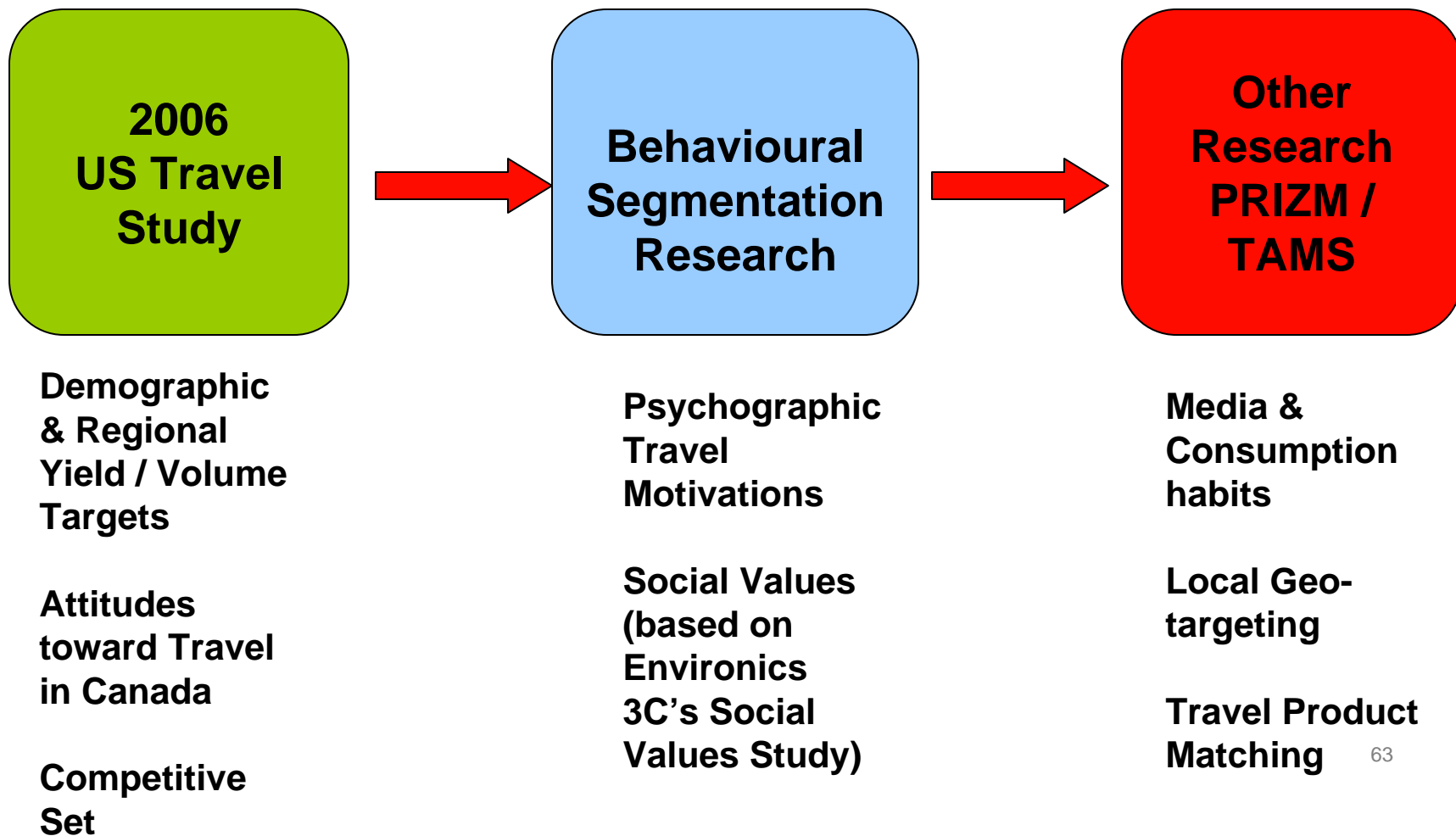
2006 Foundation

'06 Segmentation Strategy

Total US Leisure Outbound (paid hotel stays)



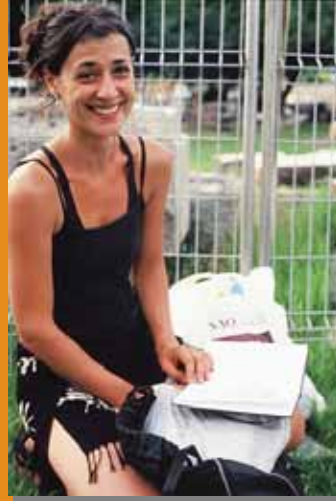
Next Steps: Integrating Segmentation, Messaging & Targeting



Approach: Who Should We Get to Know?

	% Pop	Median Group Spend	Median Person Spend
• <i>Authentic Experiencers</i>	12%	\$1200	\$500
• <i>Hedonistic Revelers</i>	11%	\$1150	\$450
• <i>Cultural Explorers</i>	12%	\$1000	\$500
<hr/>			
• <i>Familiarity Seekers</i>	16%	\$1100	\$475
• Cultural History Buffs	8%	\$1000	\$533
• Family Adventurers	11%	\$1000	\$278
• Heritage Reconnectors	12%	\$700	\$267
• Virtual Explorers	7%	\$700	\$220
• Rejuvenators	12%	\$600	\$150

Customers live very different lives...





Explorez sans fin
CANADA
Keep Exploring

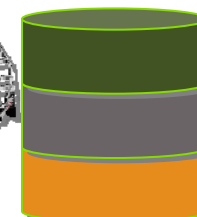
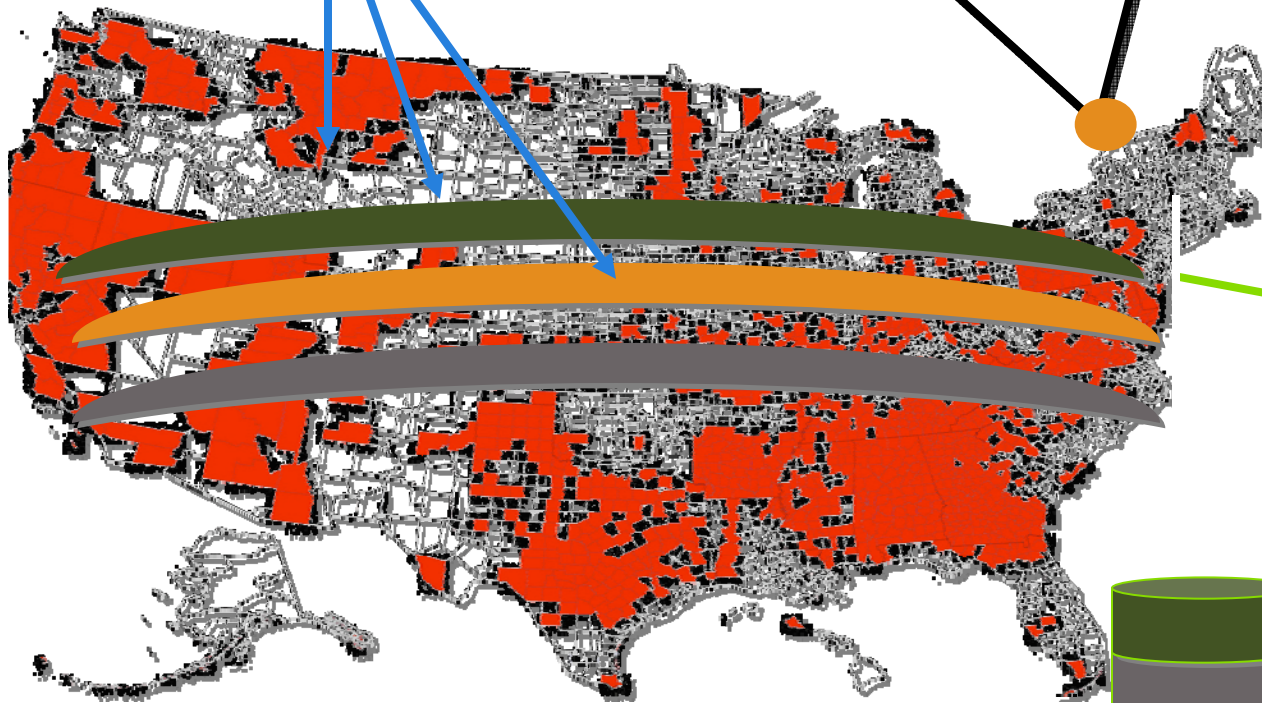
Reaching the Target Segments

National and niche programs targeting the online and offline media habits of specific market segments with tailored messages



“Local” PRIZM clusters allow us to target specific neighbourhoods, with messages tailored the target audience

Web content and outbound e-marketing



Database segmented 66
/leads captured



Explorez sans fin
CANADA
Keep Exploring

California

LA County	Pop	Median HHI
Rolling Hills	1871	200000
Hidden Hills	1875	200000
Palos Verdes Estates	13340	123534
San Morino	12945	117265
La Canada Flintridge	20318	109989
Rolling Hills Estates	7676	109010
Malibu	12575	102031
La Habra Heights	5713	101808
Manhattan Beach	33852	100750
Bradbury	855	100545
Rancho Palos Verdes	41145	95503
Westlake Village	8368	94571
Calabasas	23213	93860
Ladera Heights	6568	90233
Agoura Hills	20537	87008
Beverly Hills	33784	84197
Hermosa Beach	18566	81113
Walnut	30004	81015
Cerritos	51488	73030
Redondo Beach	63261	69173
Diamond Bar	56287	68871
Marina Del Rey	8176	68447
Santa Clarita	151088	66717
Claremont	33998	65910
Sierra Madre	10578	65900
Acton	2390	63156
San Dimas	34980	62885
La Mirada	46783	61632
El Segundo	16033	61341
La Verne	31638	61326
Lancaster	118718	61298
Altadena	42610	60549
La Crescenta - Montros	18532	60089
Glendora	49415	60013
Vernon	91	60000
Total HHI > \$200K	1029271	



**Top Markets
Population =
3,737,798**

HHI > \$60K

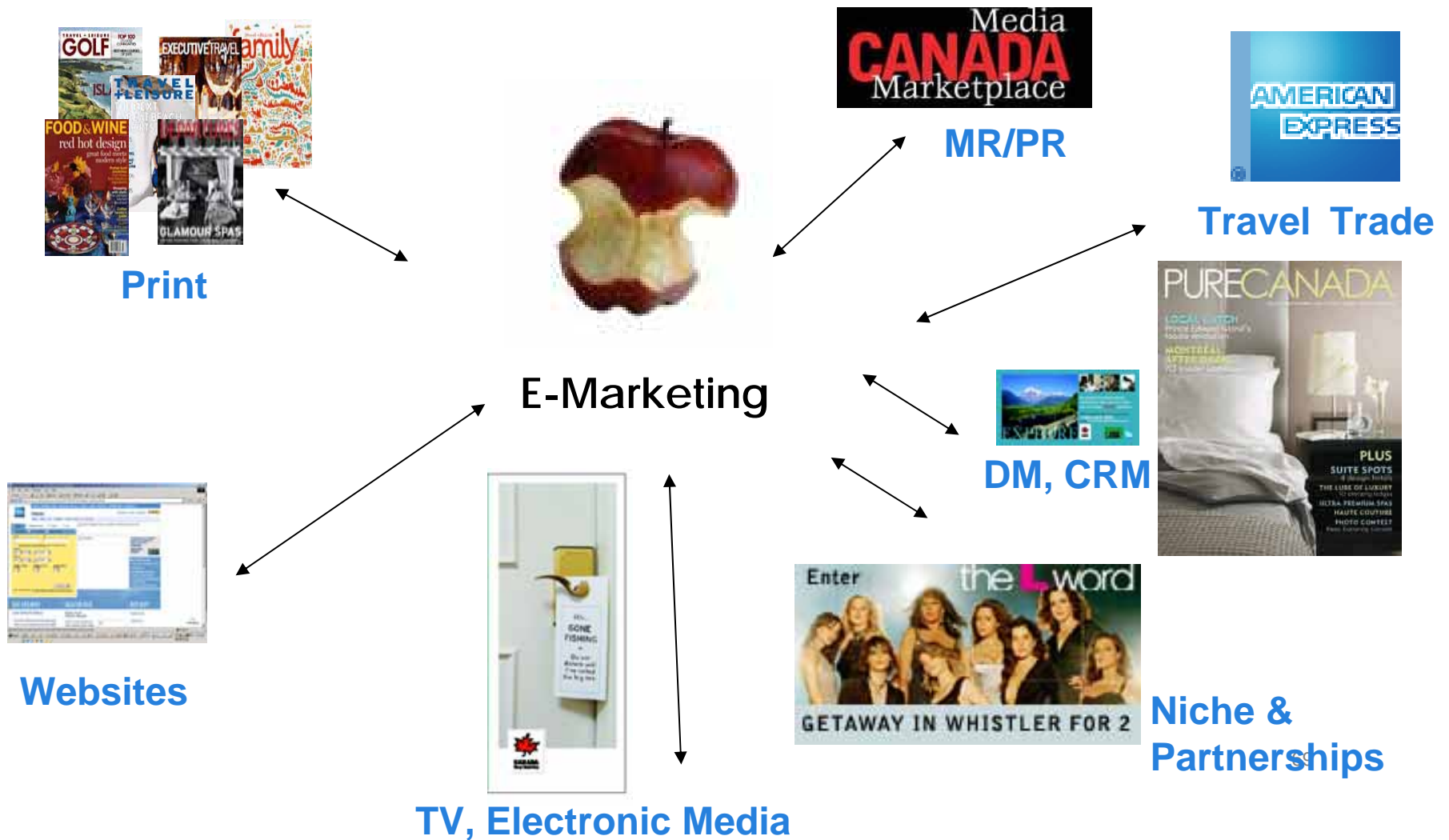
Segmentation Results

- **Shift from “fire & forget” to proactive management**
- **Shift from broad brush to market intensity approach**
- **Become students of the markets and consumers we’re trying to reach**



Explorez sans fin
CANADA
Keep Exploring

2007 -2010 - The Integrated Mix





Explorez sans fin
CANADA
Keep Explor

The Buzz



CBS NEWS

SEE IT NOW.
Anytime. Anywhere.



Google™



They're coming to Canada and so can you.

WIN The L Word® getaway in Whistler for 2 at the luxurious Fairmont Chateau Whistler!

Sundays 10PM ET/PT



© 2005 Showtime Networks Inc. All rights reserved. SHOWTIME is a registered trademark of Showtime Networks Inc.



Explorez sans fin
CANADA
Keep Exploring

US Marketing & Sales Strategic Roadmap:

STRATEGY

- Target Market Segments (Leverage markets that influence and persuade)
 - Relevant Communications
 - Build Brand Presence

PRIMARY TARGETS

DKS Demo: Gen X/ Y, 35-54, 55+ travelling without children, high-yield
Behavioural: who they are and through what channels

SEGMENTATION

Yield/Behavioral/Age
Geographic (Boston, Los Angeles, New York, Pilot Markets)
Niche Customers: Gay, Luxury Experience, and Ski

CHANNELS


Direct to Consumer
(Marketing)
Traditional media
Emarketing
Non-traditional media


Media/PR (Bridge B2C)
Leveraging in-market activities
Eg. NY Media marketplace, media
dinners, FAMs


B2B (Travel Trade, MCIT)
Customized programs with key
national travel agent
consortia and operators.

←  →



Explorez sans fin
CANADA
Keep Exploring

Key Takeaways



- » **Canada's situation is not unique**
- » **Customers as partners**
- » **Business models, new sources of value**
- » **Collective = Currency**



Explorez sans fin
CANADA
Keep Exploring



Break







Europe and Latin America

Sylvie Lafleur
Executive Director
Europe Latin America



Explorez sans fin
CANADA
Keep Exploring

Why ELA?

	Total LH (000) (000)	To Canada (000)	To USA	Revenue for CAN
	13,348.3	887.7 (6.7%)	4,618.4 (34.6%)	\$1,247.7M
	6,114.1	311.0 (5.1%)	1,412.3 (23.1%)	\$ 410.1M
	3,449.4	351.2 (10.2%)	548.4 (15.9%)	\$ 463.1M
	1,243.5 *	178.9 (14.3%)	9,000	\$ 240.1M

Key challenges

- Canada is perceived as cold and boring;
- Canada is outspent by the competition;
- Perceived as an expensive destination;
- Canada is a someday “dream” destination, no sense of urgency;
- Consumer can choose from an ever-growing number of travel destinations;
- Air access.



Explorez sans fin
CANADA
Keep Exploring

Key opportunities

- Our products (outdoor, cities, ski, cultural experiences) are a perfect match with our target audience;
- Strong attributes give us a competitive edge;
- All markets enjoy excellent partner support (traditional and non-traditional);
- The use of internet is high enabling us to connect with our audience effectively and with immediacy;
- We have good tour operator offers in all markets, and also successful Canada Specialist Programs.

Trends

- Internet is strong and growing;
- Women are the decision-makers in most markets;
- We are attracting a younger age group (24-35 years old) in UK and Germany;
- The 59+ are getting younger;
- Booking patterns and travel style.



Explorez sans fin
CANADA
Keep Exploring

Develop one-to-one relationships with customers

- Call to action >
 - contest >
 - data capture/ analysis >
 - personalized product >
 - personalized communication
- Segmentation study



Explorez sans fin
CANADA
Keep Exploring

Align market allocations for maximum ROI

- Use of internet to reach consumer;
- Increase web-oriented tactics;
- Increase working with non-trads;
- Spread costs over markets.



Explorez sans fin
CANADA
Keep Exploring

Differentiate Canada

Canada is top of mind!

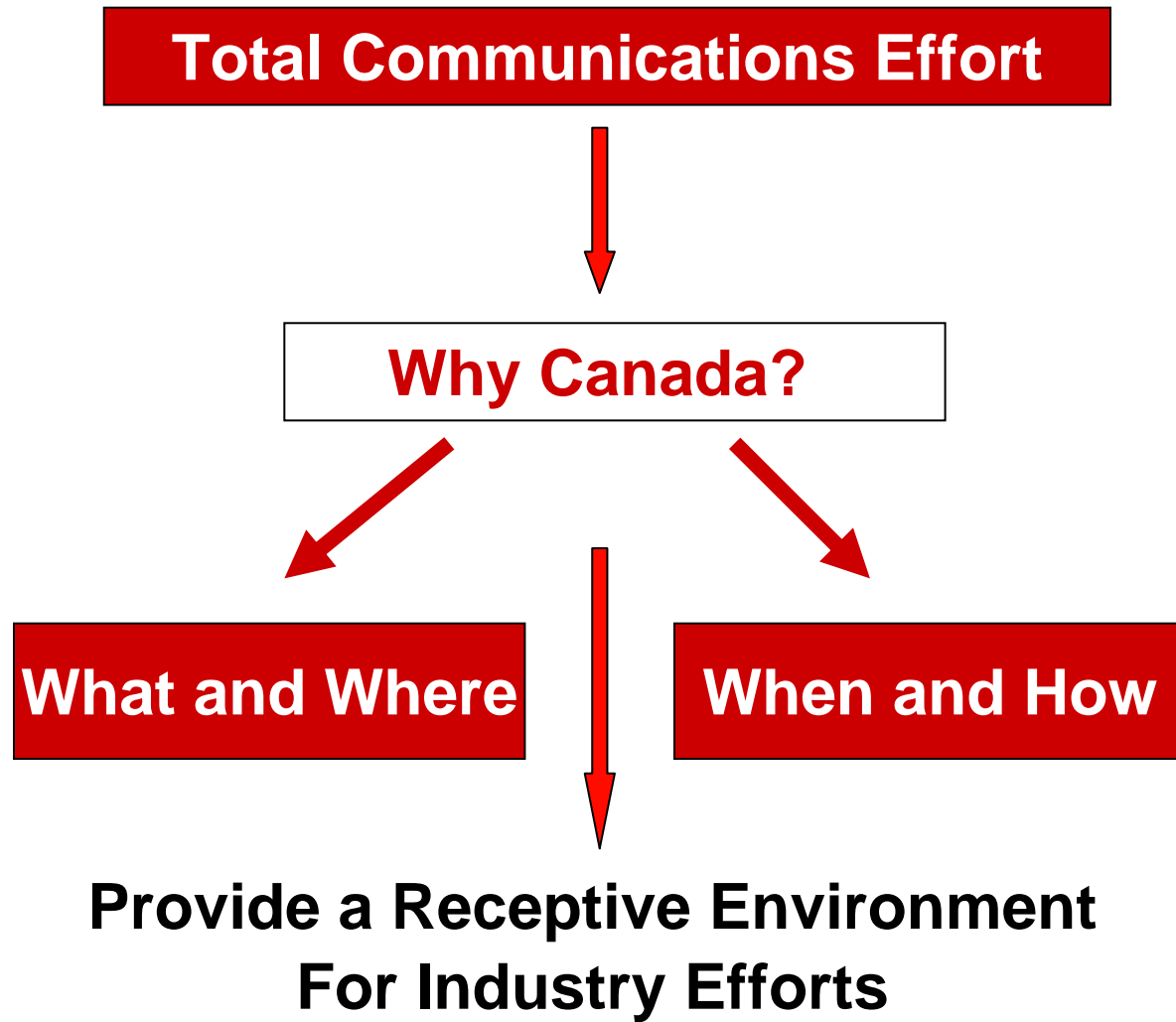


Explorez sans fin
CANADA
Keep Exploring

BRAND CANADA...is not an Ad.



Approach

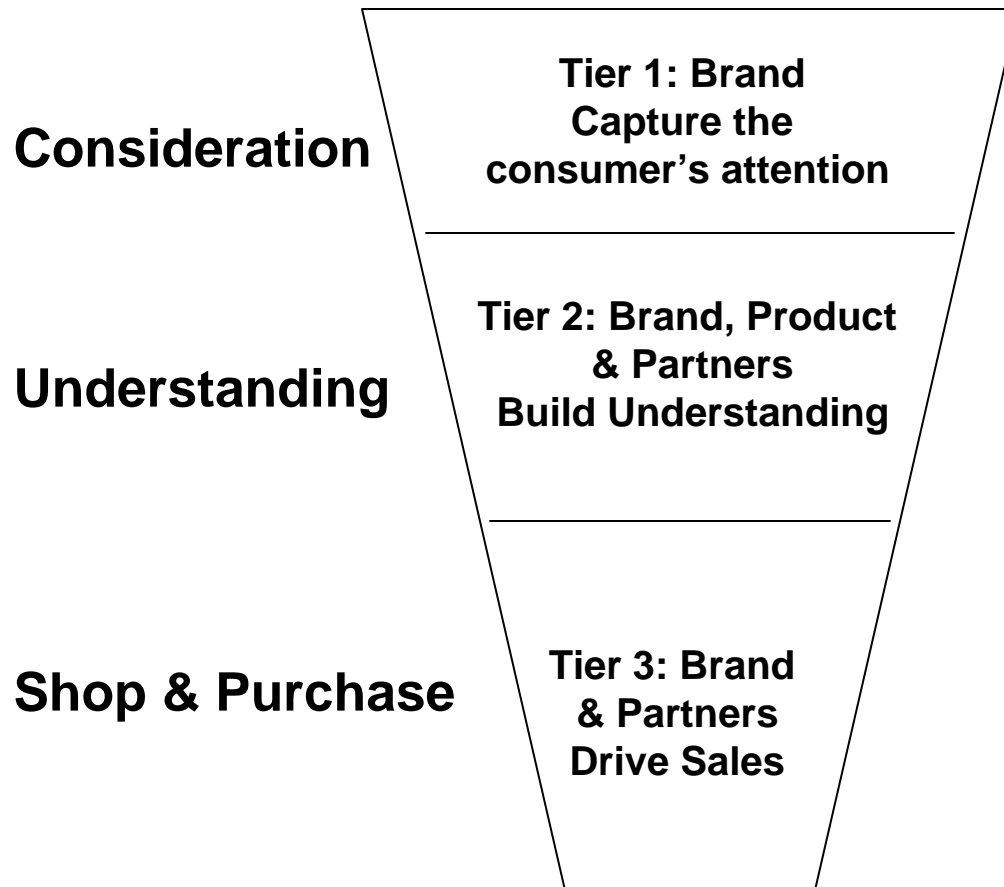




Explorez sans fin
CANADA
Keep Exploring

Approach

Path to Purchase



The Big Idea:

Re-ignite the consumer's natural curiosity.
*Simple ideas to break your routine,
brought to you by Canada*

The Big Idea:

Allow the consumer to experience
Canada without leaving home.
*Break their routine by immersing
them in a sense of what
it feels like to travel in Canada*

The Big Idea:

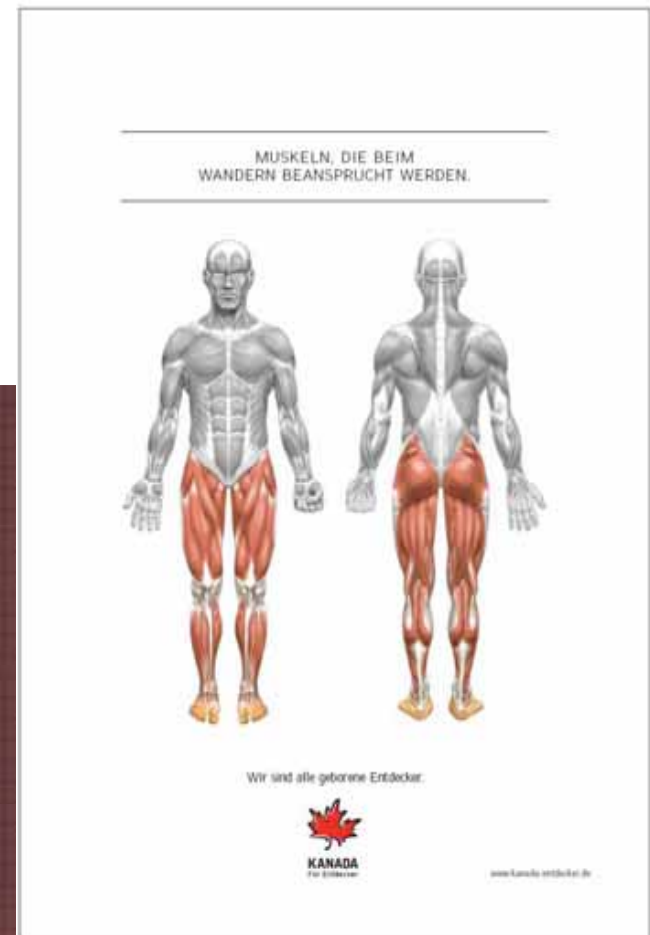
Explore your options, plan your trip today.
*Let them create their own experience of
Canada*



Explorez sans fin
CANADA
Keep Exploring

Tier 1

Use different media
and original
messaging consistent
with brand



Tier 2

Communicate
a vibrant and
exciting
Canada (in
conjunction
with partners)



 **KANADA**
Für Entdecker

GEWINNEN SIE 2 WOCHEN MIT DEM WOHNMOBIL DURCH KANADA!

Liebe Kanada-Freunde,

haben Sie nicht auch manchmal Sehnsucht nach Außergewöhnlichem, nach Abwechslung? Das Leben ist doch einfach spannender, wenn nicht alles vorhersehbar ist.

Wenn einem das Herz klopf und man den Bauch voller Schmetterlinge hat, wenn man hinter jeder Wegbiegung Neuland betritt, wenn man Überraschendes und Atemberaubendes entdeckt.

Sind wir nicht alle geborene Entdecker? Starten Sie Ihr Abenteuer:
Gewinnen Sie 2 Wochen Campmobil-Urlaub in Kanada für 2 Personen!



- Jetzt mitmachen und gewinnen
- Mehr Informationen
- An Freunde weiterempfehlen



© 2006 Canadian Tourism Commission | Impressum



Explorez sans fin
CANADA
Keep Exploring

Leverage partner investment

Tier 2 and 3 opportunities and/or parallel partnerships.

ADVERTISEMENT FEATURE

Building on artistic grounds



Canada's contemporary art scene is thriving. Now it is constructing galleries and museums that will become creative works in their own right

CANADA
Keep Exploring
canada.keepexploring.ca

At first sight, you might think you'd wandered into the Natural History Museum instead of an art gallery. Hanging from the ceiling in the middle of the main gallery is what looks like the skeleton of a whale. But on closer inspection, the "bones" are configured from the relics of white plastic deck chairs (total price, \$4.99 a pop).

The British Columbia artist Brian Jurgen receives his first full-scale retrospective at the Vancouver Art Gallery this spring, before a show at Tate Modern (May 20-July 9). Winner of the prestigious Sobey award in 2002, and a member of the Dunno-za Nation, Jurgen asks salient questions about the status of native art in the 21st century, commodification, and Canadian identity. He is one of the brightest young graduates of the ever-expanding "Vancouver School", which counts Ian Wallace, Rodney Graham, Stan Douglas and Jeff Wall among its alumni.

If you are planning an artistic visit, stay at The Fairmont Waterfront

Art by Vancouver's Brian Jurgen (above) and the Fairmont Banff Springs

hotel, which opened in 1991 and has the work of 45 very different Canadian artists on its walls. Or for a taste of local history, try The Fairmont Hotel Vancouver, once the tallest building in the world at 365ft, and which for 36 years, until 1975, housed CBC Studios (that's Canada's answer to the BBC).

To the East, Toronto is intent on reclaiming its credentials as Canada's capital of culture, investing millions in an extraordinary programme of public building involving some of the finest architects in the world, such as the Brits Norman Foster and Will Alsop, Daniel Libeskind and even local-roy-made-good Frank Gehry. This architectural critical mass is celebrated in Culture City: New Toronto Buildings, a new exhibition presented by the Art Gallery of Ontario. A decade of Frank Gehry's work also features in a companion exhibition.

Toronto, too, has a Fairmont hotel to stay in or simply to marvel at: The Fairmont Royal York is a 75-year-old architectural masterpiece 28 stories high. Its Imperial Room once welcomed jazz legends such as Ella Fitzgerald and Peggy Lee; more recently the hotel has hosted the films Cinderella Man and Where the Truth Lies.



Probably Canada's most cosmopolitan city, Montreal, is also busy defining itself through art: the Canadian Centre for Architecture's Sense of the City show celebrates the metropolitan sights and smells so easily ignored by city-dwellers. The next Montreal Biennale is in 2007, with a focus on the unexpected in new and contemporary Canadian art. Overall, the city hosts 30 festivals annually, and its Fairmont hotel, The Queen

Elizabeth, has been recognised by Travel and Leisure as one of the 500 greatest in the world. Nearby Quebec City boasts an equally spectacular Fairmont hotel, Fairmont Le Chateau Frontenac, standing high on the bluff overlooking the mighty St Lawrence River.

Which leads one to consider that the real art of Canada is not man-made: it is natural, and vast, and spectacular. If you want to get away from the cities and into the heartland, The Fairmont Banff Springs and The Fairmont Chateau Lake Louise are both architecturally striking hotels built back in the 19th century, but more recently renovated, at a cost of \$75 million and \$65 million, to 21st-century standards of comfort.

There is only one way to see the sights of Canada — Fairmont Hotels & Resorts. To plan your Fairmont holiday, contact your Thomas Cook Signature Travel professional at 0870 4434511 or visit www.tcsignature.com

Thomas Cook Signature



SIGHTS



Explorez sans fin
CANADA
Keep Exploring

Target Audience UK

PRIMARY & SECONDARY TARGETS

35-59 years of age, middle to high income 24-35 years of age, middle to high income

Couples and singles (without children or grown up children)

Niche: Ski

London, Southeast and Central England

CHANNEL MIX



Consumer

- Advertising (trad/non-trad)
- On-line & offline campaign
- E-Newsletters
- E-brochures



Media/PR

- TV/Magazine/Newspaper
- Media events
- Media Fam
- Special Products



Trade

- Canada Specialist Program
- E-Newsletters
- Trade shows
- Product testing trips

Target Audience Germany

PRIMARY & SECONDARY TARGETS

35-59 years of age, middle to high income

24-35 years of age, middle to high income

Couples and singles (without children or grown up children)

Niche: Gay and lesbian, ski

They live in larger Western cities in Germany (100,000+)

CHANNEL MIX



Consumer

- Advertising (trad/non-trad)
- On-line & offline campaign
- E-Newsletters
- E-brochures



Media/PR

- TV/Magazine/Newspaper
- Media events
- Media Fam
- Special Products



Trade

- Canada Specialist Program
- E-Newsletters
- Trade shows
- Product testing trips



Explorez sans fin
CANADA
Keep Exploring

Target Audience France

PRIMARY TARGETS

35-59 years of age, middle to high income

Couples and singles (without children or grown up children)

Niche: gay and lesbian

They live in Paris, chic outskirts of city and large cities like Bordeaux, Lyon, Lille and Marseilles.

CHANNEL MIX



Consumer

- Advertising (trad/non-trad)
- On-line & offline campaign
- E-Newsletters
- E-brochures



Media/PR

- TV/Magazine/Newspaper
- Media events
- Media Fam
- Special Products



Trade

- Canada Specialist Program
- E-Newsletters
- Trade shows
- Product testing trips



Explorez sans fin
CANADA
Keep Exploring

Target Audience Mexico

PRIMARY TARGETS

30-40 years of age, middle to high income
Couples and singles (no children)
Mexico, Guadalajara and Monterrey

CHANNEL MIX



Consumer

- Advertising (trad/non-trad)
- On-line & offline campaign
- E-Newsletters
- E-brochures



Media/PR

- TV/Magazine/Newspaper
- Media events
- Media Fam
- Special Products



Trade

- Canada Specialist Program
- E-Newsletters
- Trade shows
- Product testing trips

In closing

- Modernize our marketing mix around content distribution.
- Deliver an integrated and measurable 07 campaign,
- Segmentation studies for all markets,
- Create a sense of urgency in visiting Canada,
- Continue to work in collaboration with industry partners to close the sale.



Explorez sans fin
CANADA
Keep Exploring

Olympic and Paralympic Winter Games

Gordon Goodman
Executive Director
Business Development



Explorez sans fin
CANADA
Keep Exploring

The Games' World is Changing

- Winter games more compact and broadcast oriented
- Technology changes driving customer reach
- Host jurisdictions want more and broader ROI
- Global economy will provide more opportunities for leveraging



Come and experience the beauty, sophistication and wonder that is Torino, Italy.





Explorez sans fin
CANADA
Keep Exploring

Olympic Broadcast

Salt Lake 2002	Torino 2006
<ul style="list-style-type: none">• 3 billion television viewers in 160 countries totaled 13.1 billion viewer hours• In the USA and winter sport nations, viewers watched up to 29 hours of coverage• New media usage not tracked	<ul style="list-style-type: none">• 3.1 billion television viewers in 200 countries and territories totaling 16.3 billion viewer hours• Over 250 million viewed games on new media platform (internet and cell phones)• Bell Canada broadcast over 120,000 minutes of video streaming of Game's highlights on cell phones

- **China – full mobile technology used for broadcasting**
- **2010 – full “digital” games**



Explorez sans fin
CANADA
Keep Exploring

Olympic Broadcast





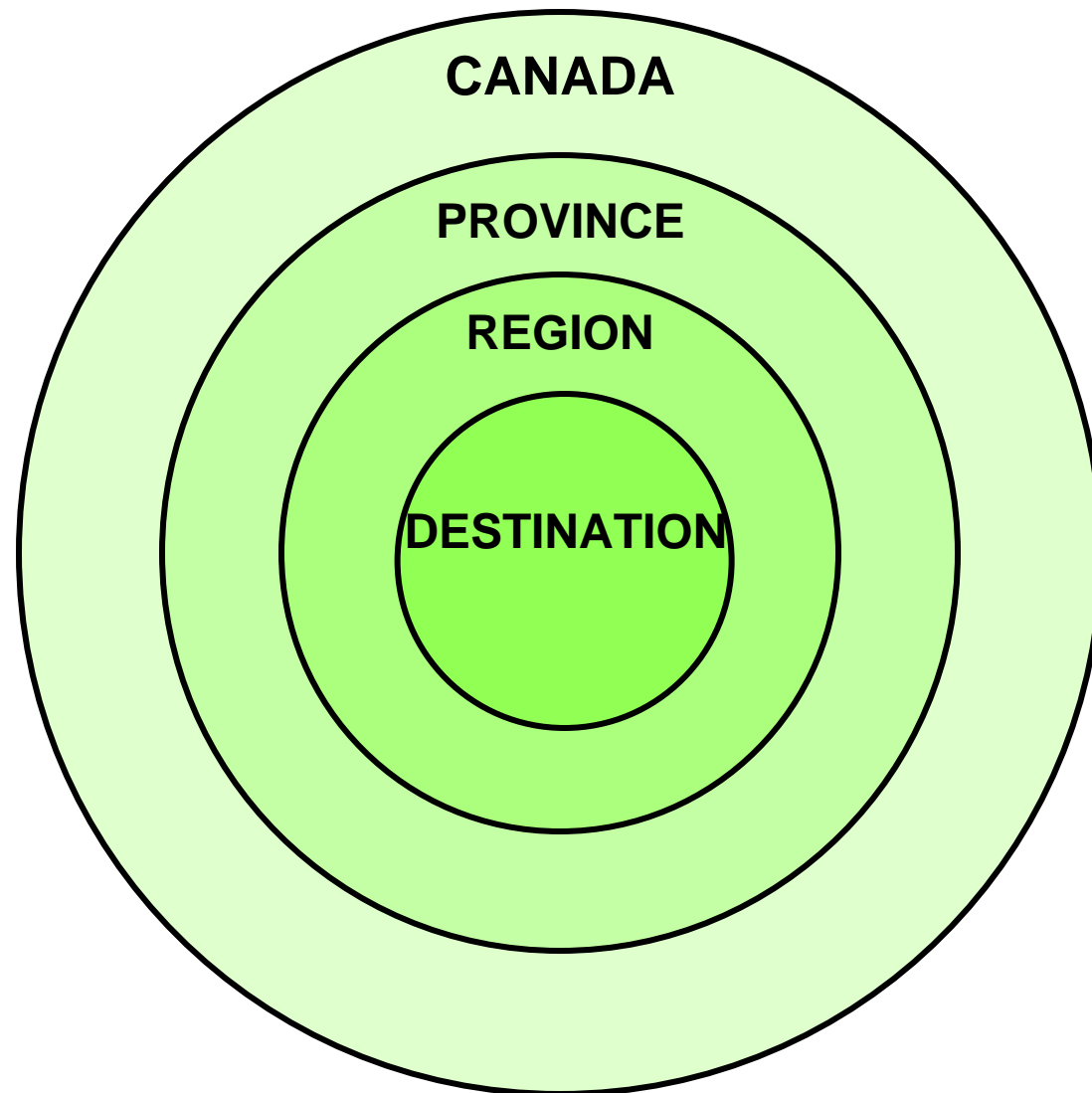
Legacy Position - 2010 Focus with a 2020 vision

- Successful games imperative
- What happens after 2010 is how our success rate will be measured
- Proactive, Adaptable and Collaborative (PAC approach)
- Organization of “leveraging champions”
- Integrated to accelerate and enhance success for achieving objectives



Explorez sans fin
CANADA
Keep Exploring

Roles and Collaboration



Direct Link to CTC Goal and Objectives

Leverage the global exposure from hosting the Olympic and Paralympic games to grow export revenues

Global Media Exposure

Marketing

Business Development

- Convert high yield customers
- Focus on markets of highest ROI
- Brand Consistency



Explorez sans fin
CANADA
Keep Exploring

CTC Objectives and Priorities

Global Media Exposure

- Broadcasters
- Accredited Media
- Non accredited media
- Travel and lifestyle writers

- Awareness and differentiating
- add dimensions to the brand
 - excitement, international, passion, welcoming, competence

Marketing

- Brand Canada
- In market promotions
- Core market penetration
- Games specific marketing

- Capitalize on Olympic family connections
- Olympics as door opener
- enhance in-market penetration
- conversion from awareness to travel commitment

Business Development



- CTC ultimate partner
- New relationships
- globalization
- post games intentions



Explorez sans fin
CANADA
Keep Exploring

Brand Canada and the Olympics

- The Olympics and strengthening Canada's brand:
 - an additional high profile exciting dimension to Canada's story
 - core market penetration – Olympic and winter sport connections (Australia, Japan, China, USA, UK, Korea?)
 - Focused Games marketing in collaboration with VANOC
 - Opportunity to expand brand scope – culture, wine and food, technology...





Explorez sans fin
CANADA
Keep Exploring

Event Platform





Explorez sans fin
CANADA
Keep Exploring

Event Platform





Explorez sans fin
CANADA
Keep Exploring

Event Platform





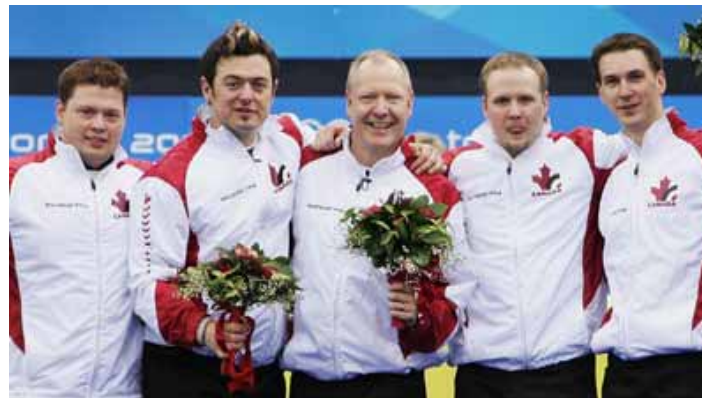
Explorez sans fin
CANADA
Keep Exploring

Event Platform



Outcomes

- Global awareness of Canada as *confident, youthful, evocative, beautiful, upbeat, friendly, witty, intriguing, authentic (real)* – *strengthened Canada Brand*
- Increased partnerships that go beyond 2010
- Strong position for converting awareness to visits
- Collaborative relationships that continue beyond 2010
- CTC expertise to leverage other events
- CTC strategic plan achieved





Explorez sans fin
CANADA
Keep Exploring



CANADA

TM&C

vancouver 2010

Host Pays
Country hôte



Explorez sans fin
CANADA
Keep Exploring

Asia Pacific

Donna Brinkhaus
Executive Director
Asia-Pacific



Explorez sans fin
CANADA
Keep Exploring

A/P Program Overview

- Work in 4 key markets – 1 emerging market, research underway for India
- All markets are unique and there is limited cross over opportunity
- 151.2M Outbound travellers from key A/P markets
 - Long-haul travel: 19.9M (Canada 4.7%)
 - China, Australia & Korea, hit record high in '05
 - A/P - The highest yielding markets
- Both China and India's outbound travellers will reach 100 million and 50 million, respectively, by 2020

Challenges

- Macro factors
 - volatility of currency, inflation, fuel pricing and world threats
- Lack of brand saliency
- Perceived as a nature only destination, expensive, boring and far away ... Stale image
- High airfare & limited air capacity (direct flights)
- Fierce competition
- Travel to short-haul destinations growing
- Declining ski market

Opportunities

- Maximize trend in FIT/SIT travel
- Exploit growing niche segments – Ski, honeymoon, spa and golf . . . Experiential products
- Capitalize tremendous in-market partner support
- Innovative and emerging use of electronic mediums/devices
- Interest in MICE



Explorez sans fin
CANADA
Keep Exploring

Key Trends

- Explosion of outbound travel from Korea/China/India
- Travellers want ‘an experience’ not just a ‘trip’
- Savvy travellers – know the difference between a ‘cheap deal’ and ‘value for money’
- Celebrities/Media heavily influence consumer decision
- Shift from Group to FIT
- Leading edge technology is born in Asia
- Internationally known attractions - signature sites still popular.. leverage



Explorez sans fin
CANADA
Keep Exploring

Key Trends - China

China's outbound tourists hit 31 million (2005)

- 234 destinations – **7.5%** growth in 2005 over 2004

China visits to Canada

- 2004 - 101,883
- 2005 - 117,490 **+ 15.2%**

Approved Destination Status (ADS)

Now 89 countries have ADS and 639 authorized outbound travel agencies in Beijing, Shanghai, & Guangdong

No ADS

- CTC, Provinces, Regions or Cities not permitted to promote or advertise Canada as a leisure destination
- Travel Agents not permitted to advertise and promote travel to Canada
- Transfer of funds is extremely difficult
- Focus on MICE, FIT travel



Explorez sans fin
CANADA
Keep Exploring

Asia Pacific

So....What are we going to do in 2007 in Asia Pacific to grow business?

Reposition Canada

- Reposition Canada to offer more than just beautiful scenery. . utilize existing icons to leverage new experiential, regional and seasonal products.. Focus of effort
- Build brand equity through execution of all initiatives (by all partners....)
- Differentiate product
 - Stale....to...**experiential**
 - Segment interest – new product development
- Work in partnership with travel industry to raise awareness

Enhance and build partnerships

- With traditional and non-traditional partners
- Focus of effort = Product development and integrated promotions
- Clients C to B; B to Key Accounts
- Create win/win scenarios with industry leaders i.e. Scenic tours - coop
- Economy of scale/scope
 - Share learnings
 - Global publications





Explorez sans fin
CANADA
Keep Exploring

E-Marketing

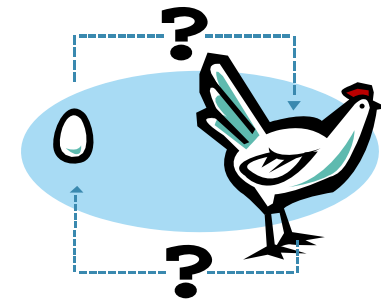
- Take full advantage of CRM initiatives – and - localized website
 - Create programs that drive target consumer to our site = segmented data for future use
- Develop measurable e-marketing platform: Web hits; fulfillment requests; campaign results...
- Take a leadership role and create opportunity for partners

Capture the high yield traveller

- Engage the high yield traveller to buy Canada...now
- Volume business not forgotten
- Develop an integrated approach to all trade, media relations, PR + consumer initiatives

Air Capacity

- Expand airline partner base and air capacity = Market Growth
- Charters
- Leverage partner investment and grow Canada's share of voice





Explorez sans fin
CANADA
Keep Exploring

Target Audiences



Japan

- Female aged 55-69 years old
- Single working women in their 30's



S Korea

- Senior in group travel; age 50+, Male & Female
- FIT 30 to 49, Male & Female (inclusive of young families)
- Niche Market



Australia

- 30+ years old, male & female with or without children
- Mature Travellers 55+ years old, male & female with no children
- Ski & Board enthusiasts male & female



Explorez sans fin
CANADA
Keep Exploring

Target Audiences



China

- Business travellers – senior/middle management professionals
- Government and State Run Enterprise business/leisure groups
- Frequent travellers including VFR
- MICE Market with focus on long-haul Incentive traffic
- Student/Summer Camp
- SIT



Explorez sans fin
CANADA
Keep Exploring

Channel Mix

Target Audiences



Consumer

- On-line campaign
- Vacation Guide
- Advertising
- On-line campaign / IT technology
- E-Newsletter
- Destination Guide/E-brochure
- Co-op advertisement & campaign
- Outdoor



Media/PR

- TV/Magazine/Newspaper
- Media events
- Media Fam



Trade

- Educationals
- E-Newsletter
- B-B Trade shows
- Fam
- CSP

Advertising (Exp. China)

E-marketing / Branding

In closing...

- Understand markets through research – clearly defines, explains and uncovers the in-depth key findings on the A/P markets
- Those with export ready products – look and act on the opportunities – A/P has diverse markets – all at different stages – from emerging to mature markets
- Stable economic climate, strong outbound travel trend and growing in the A/P region
- The A/P team is here to support initiatives aligned with our priorities