



Canadian Tourism Commission

Inspiring the world to explore Canada

The Calgary Region as a Transportation Hub Conference – December 2, 2010



Canadian Tourism
Commission

Commission canadienne
du tourisme

www.canada.travel

Who we are

- Federal Crown corporation since 2001
- Headquartered in Vancouver
- Currently marketing in 12 countries around the world

Our vision

Inspire the world to explore Canada.

Our mission

Harness Canada's collective voice to grow export revenues.

Our values

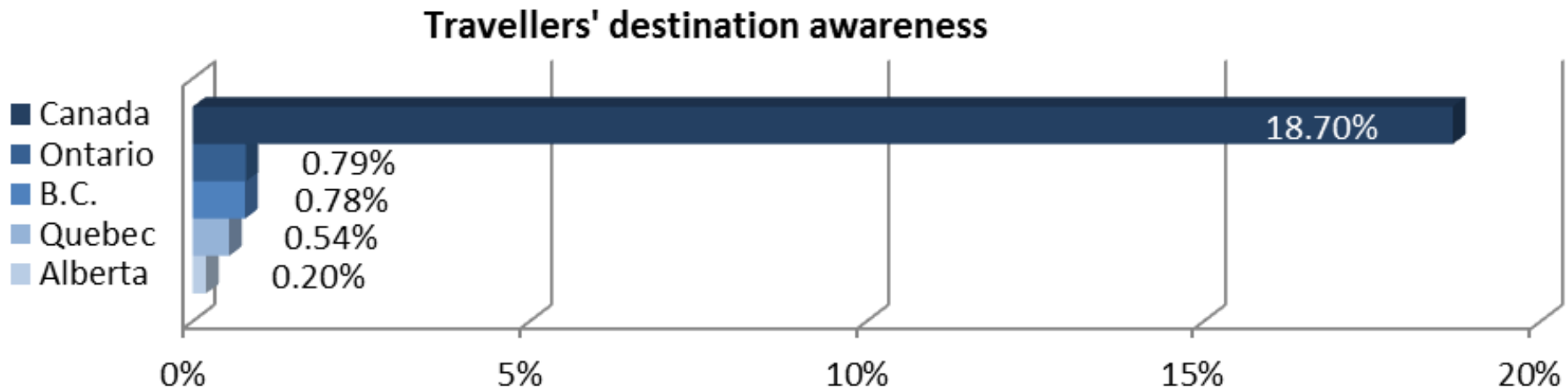
Innovation, Collaboration, Respect

CTC mandate

- Generating wealth for Canadians by stimulating demand for Canada's visitor economy.
- We do this through effective tourism marketing and promotions supported by aligned market research.

International travellers' awareness

- Travellers are more aware of countries rather than regions or attractions.



Source: Global Tourism Watch, Destination Awareness (Harris/Decima 2009)

Role of destination marketers is transforming

- Emerging economies are investing heavily in tourism marketing (e.g. India, Turkey).
- Internationally, progressive NTOs are re-vamping their models to be more efficient (e.g. VisitBritain, Tourism New Zealand, Tourism Australia).
- The CTC was created in 2001 and initially funded to be a full-service national tourism marketing organization, but is no longer resourced for this.
- Canadian marketing partners (i.e. PMOs and DMOs) are increasingly well-funded.

	Mexico	UK	France	Germany	Japan	South Korea	China	Australia	
Market potential	8.5M	27.5M	23.1M	26.2M	21.3M	13.3M	2.8M	6.9M	Brand Building
Step 1 ✓ Hear about the destination	100%	100%	100%	100%	100%	100%	100%	100%	
Step 2 ✓ On priority list A destination that they think about going to in the future	81.4%	82.6%	85.9%	81.1%	80.3%	83.7%	89.8%	81.9%	
Step 3 ✓ On seriously considering list Seriously considering in the next 2 years	5.0M 62.6%	12.0M 42.6%	10.0M 45.5%	13.0M 50.7%	7.0M 31.1%	7.0M 54.7%	2.0M 68.7%	3.0M 37.6%	
Step 4 ✓ Creating a “vacation movie” Starting to gather info—friends, internet, articles, brochures	3.0M 30.3%	5.0M 19.5%	5.0M 22.2%	6.0M 23.7%	3.0M 12.9%	3.0M 23.0%	1.0M 38.9%	1.0M 15.8%	Barriers*: 19M potential new customers
Step 5 ✓ Detailed itinerary planning Planning the details of an itinerary to Canada	0.9M 10.9%	1.7M 6.1%	1.1M 4.7%	2.0M 7.5%	0.7M 3.5%	1.1M 7.9%	0.4M 15.9%	0.2M 3.6%	
Step 6 ✓ Finalizing trip arrangements In the process of working out travel arrangements	3.2%	2.0%	1.3%	2.9%	0.7%	1.5%	2.7%	0.8%	Tactics Conversion
Step 7 ✓ Purchase Booked a trip to Canada	0.9%	1.0%	0.6%	0.5%	0.1%	0.2%	1.1%	0.3%	
2009 Overnight trips	0.178M	0.714M	0.406M	0.309M	0.198M	0.138M	0.160M	0.205M	
Arrivals to planning ratio	19.0%	43.0%	37.0%	16.0%	27.0%	13.0%	36.0%	83.0%	

*The bottleneck between steps 4 and 5 demonstrates that 19 million people are close to booking at trip, but further action is needed.

UK

Market Potential

27.5 million

Hear about the destination

100%

On priority list

82.6%

On seriously considering list

42.6% → 12 million

Creating a “vacation movie”

19.5% → 5 million

Detail itinerary planning

6.1% → 1.7 million

Finalizing trip arrangements

2.0%

Purchase

1.0%

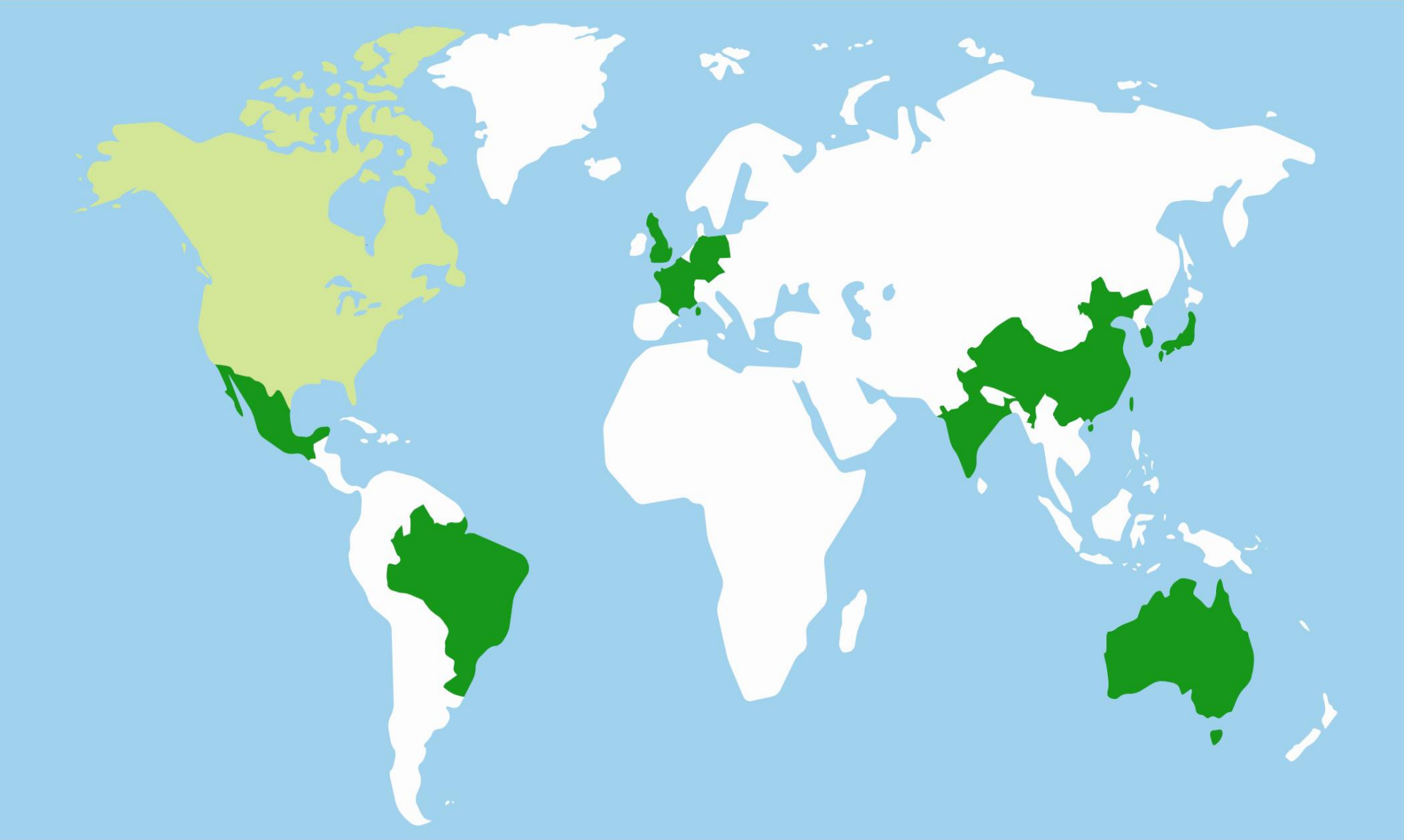
2009 Overnight trips

0.714 million

Arrivals to planning ratio

43.0%

Focus on Brand leadership roles



■ CTC Brand leads

■ Canadian partners Brand leads

- Infrastructure
 - Tunnel
 - LRT
 - High-speed rail – Edmonton
- Access Animation Alignment