

Partial Review of Provincial and Territorial Tourism Marketing Organizations in Canada

Newfoundland

- Newfoundland Marketing has an advisory council of 8 reps recommended by the industry to the Minister along with 2 gov't appointees that advise the Ministry on issues related to tourism marketing; currently under review
- Primary market is Ontario followed by Atlantic Canada
- Department of government funded directly

PEI

- Tourism Advisory Council advises the Minister
- Members are chosen by the Minister; members need not represent the tourism industry
- Funded directly by the province and generate some revenues from ad sales and partnership programs
- The Maritimes, Quebec and Ontario are their primary markets

Nova Scotia

- Has a Tourism Partnership Council; advisory only, no decision making
- Give advice to the Minister
- 16 individuals appointed from the tourism industry with 4 government appointees for a total of 20 individuals
- Applicants are vetted through a selection committee that includes 3 sitting members of the TPC and 3 others from the industry, including the Chair of TIANS
- This is a direct government agency; no DMF
- Atlantic Canada is their primary market; primary target is Ontario, Alberta and Europe
- Partnership agreements are a mix of direct fund transfers to associations and joint programs

Atlantic Canada

- Has a federal program which adds additional funding over and above that spent by the individual provinces to market Atlantic Canada

Quebec

- 22 autonomous regions in the province fully-funded by DMF (\$2 a night per room in most areas, 3% in major centres)
- Tourism Quebec does no in-province marketing; strictly out of province.
- Major markets are Northeastern US, Ontario and Mexico
- Offers little support to tourism associations
- There is an industry advisory council, but they have no decision making authority
- Partnership programs are 50/50; minimum \$50,000 buy in

Manitoba

- Members of Travel Manitoba's Board of Directors are leaders in the community and are appointed by Manitoba's Lieutenant Governor in Council. The Chair and Vice-chair are also appointed by the Lieutenant Governor, in consultation with the Board. Members of

- the Board bring a cross section of professional skills and core competencies to their positions, including research, legal, technology, finance and media. Appointments to the Board are staggered and last for two-to-three year terms, to ensure continuity of expertise and planning.
- Board members meet a least four times each year and are governed by by-laws, a code of ethics and conflict-of-interest guidelines. As stipulated in the Travel Manitoba Act, the Board must have a minimum of nine and a maximum of 15 directors.
 - The Board reviews the advice and analysis of management; assesses situations, opportunities and issues affecting Manitoba's tourism industry; and identifies the desired results that Travel Manitoba will achieve within a defined period.
 - Industry Advisory Committees (IACs) are voluntary committees consisting of members of Manitoba's tourism industry. Members are chosen from a cross-section of industry sectors, including cultural attractions, operators, regional associations and small businesses. The committees provide input from the industry's perspective on issues, trends and events affecting tourism. The committees report to the President and CEO through the corresponding division's Vice-president and other senior staff assigned by the CEO.
 - There are currently three IAC's: Leisure, Culture and Heritage; Industry Quality and Competitiveness and Outdoors.
 - Target markets are Manitoba, NW Ontario, Saskatchewan, North Dakota, Minnesota and Alberta.
 - In their segment budget, high yield received 7% of the funding, high volume received 93%.

Saskatchewan

- Partnership programs are directed in-province; out of province marketing done by Tourism Saskatchewan
- Independent body funded by government grant; conducts all tourism marketing for the province
- Board of Directors is appointed by industry; government has appointees on the Board
- Primary markets are: US for hunting and fishing; BC, Alberta and Ontario for other experiences

Alberta

- Tourism marketing strategy is guided by the volunteer, industry-led Strategic Tourism Marketing Council.
- Travel Alberta is funded through four per cent Tourism Levy on accommodations.
- Primary Market is right in Alberta itself
- Board is appointed by the Minister from industry members that apply
- Partnerships are driven by industry-led consortia

British Columbia

- Introduced *Tourism 2.0*, a new business model for working with regional and community partners. The fundamental principle of Tourism British Columbia's partnership programs is to build tourism business throughout British Columbia in a way that is inclusive of industry and achieves more collectively than independently.
- Goal is to grow tourism revenues to \$18 billion by 2015 (currently \$10.6 billion)
- Tourism British Columbia became a Crown corporation in June 1997. The mandate of Tourism British Columbia, as defined under the *Tourism British Columbia Act*, is to:
 - Market British Columbia as a tourism destination.
 - Provide information services for tourists.

- Encourage enhancement of standards of tourist accommodation, facilities, services and amenities.
- Enhance professionalism in the tourism industry.
- Encourage and facilitate the creation of jobs in the tourism industry.
- Collect, evaluate and disseminate information on tourism markets, trends, employment, programs and activities, as well as on the availability and suitability of infrastructure and of services that support tourism activities.
- Generate additional funding for tourism programs.
- Tourism British Columbia's role is not limited to marketing; they take a full spectrum approach to growing their tourism revenues
- Has strong partnerships with DMOs and provincial associations
- It is governed by a 15-member Board of Directors, with management, financial and legal authority under the *Tourism British Columbia Act*. The Board provides policy direction and leadership to the organization and invests the CEO with the responsibility to implement the policies and programs of the Corporation.
- Realizes the need for close proximity, high volume, lower spend visitation as a key driver of tourism
- A partial breakdown of their marketing budget shows:
 - \$2.4 million online
 - \$5.6 million on touring campaigns in North America
 - \$4.0 million with tourism partners (DMOs and associations)
 - \$1.3 million in outdoor adventure (geared to a younger market)
 - \$1.5 million on winter activities
 - \$1.3 million on consumer publications
 - \$1.2 million in large DMO assistance (Vancouver, Victoria and Whistler)
 - \$0.8 million on Golf, Wine and Culinary
 - \$2.1 million promoting large cities
- Other non-marketing initiatives include offering training programs, assistance in developing strategic and marketing plans, and a province wide booking engine
- Primary markets are British Columbia, Alberta, Ontario, Washington and California. International markets include China (\$9.8 million spent on China alone) Australia, Japan, United Kingdom, Germany and Netherlands
- Revenues come from three areas: Government Grants (\$20 M), DMF (\$32 M) and Program Delivery (\$9 M) for a total budget of \$61 million.
- Budget increase for marketing are already in place for the next three fiscal cycles: \$33M in 2008/09, \$33.7M in 2009/10 and \$37M in 2010/11
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Yukon

- Directly funded by government
- US, rest of Canada, Europe and Japan primary markets

Northwest Territories

- Advisory Board with 10 of 12 members appointed based on industry recommendations
- Marketing and Product Development linked; organization is responsible for both