



WESTERN CANADIAN AVIATION FORUM

MAY 2, 2013



WESTERN CANADIAN AVIATION FORUM





BUSINESS TRAVEL

Glamorous Locations, Great Food, Luxurious Accommodations, Exciting Entertainment

Market update



Canada: Positive arrivals momentum globally

Arrivals:

Jul '10 – Jun '11 vs. Jul '11 – Jun '12



0.8%*



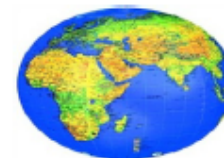
*2010 vs. 2011



0.9%



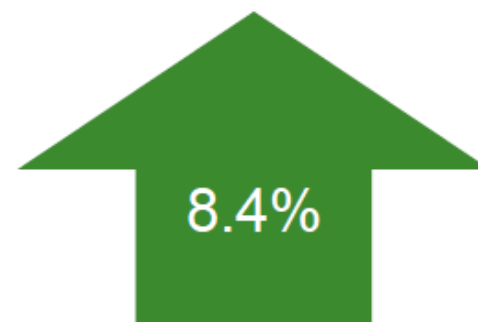
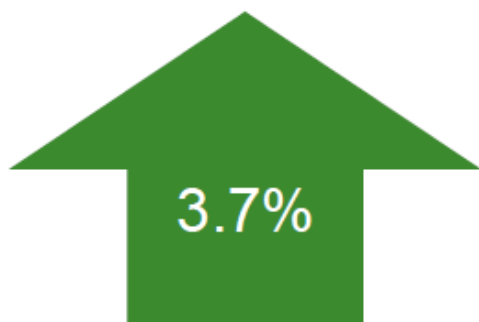
3.1%



All other countries

Canada: Strong receipts growth from overseas

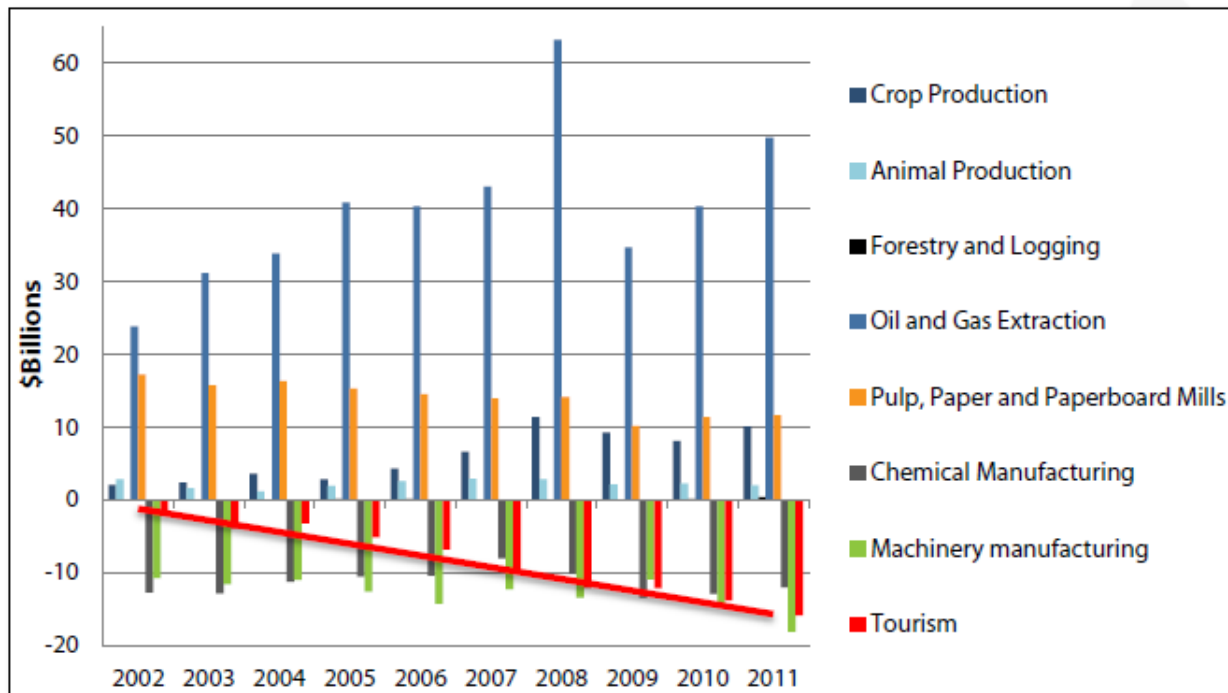
Receipts: Jul '10 – Jun '11 vs. Jul '11 – Jun '12



All other countries

Source: Statistics Canada

- Despite Canada's potential, tourism is one of the fastest-dropping sectors in the Canadian economy



What's Holding Canada Back? The Experts' Take...

Canadian Business Magazine, August 2012

- **#11. Insufficient Tourism Marketing**

"...while other nations are aggressively promoting themselves, Ottawa chose to slash the tourism commission's budget ..."

- **# 13. Pricy Plane Seats**

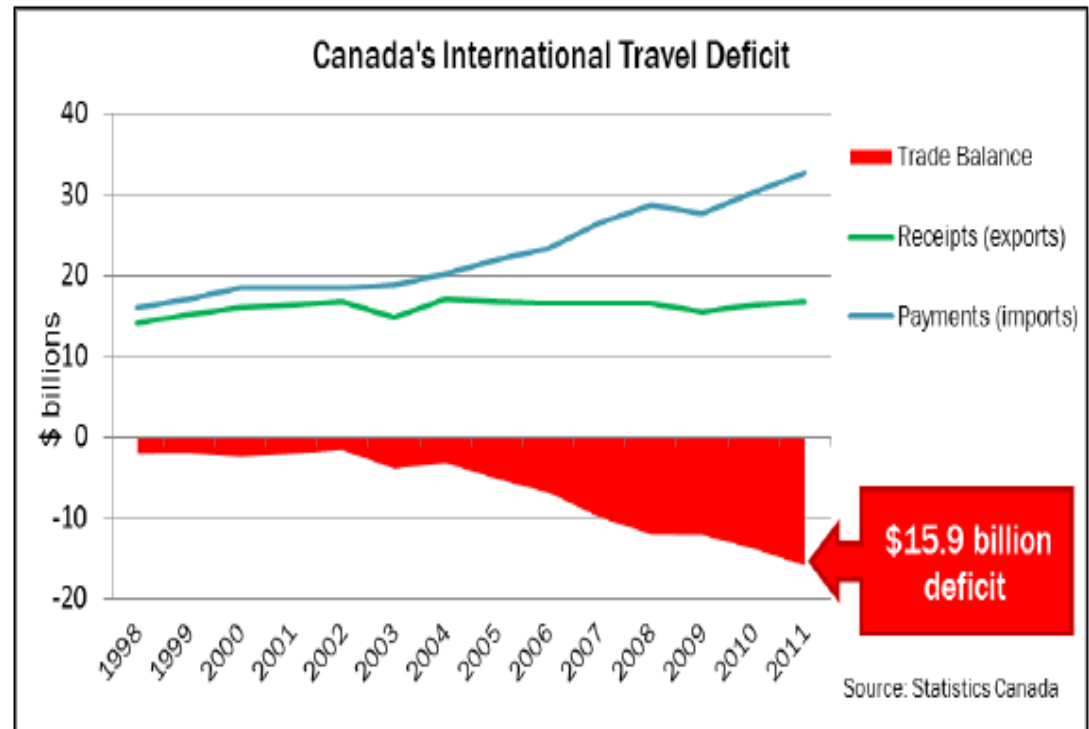
"Time for Ottawa to stop viewing airlines as revenue sources and see them as tools for economic growth."



Domestic Traveller



- Canadians love to travel abroad, but we are not attracting enough foreign visitors to compensate
- Travel deficit is exploding: Canada's travel deficit, almost \$16 billion at the end of 2011, has increased six-fold in just the past decade.



- Canada's international travel balance: -\$15.9B or 1/3 of our total trade deficit

Canada's Trade Balance: -\$48.3 B

All Other Categories
(Includes Goods, Transportation,
Commercial Services, Government
Services, Investments and transfers):

-32.4 Billion
67.1% of overall total



Travel balance:

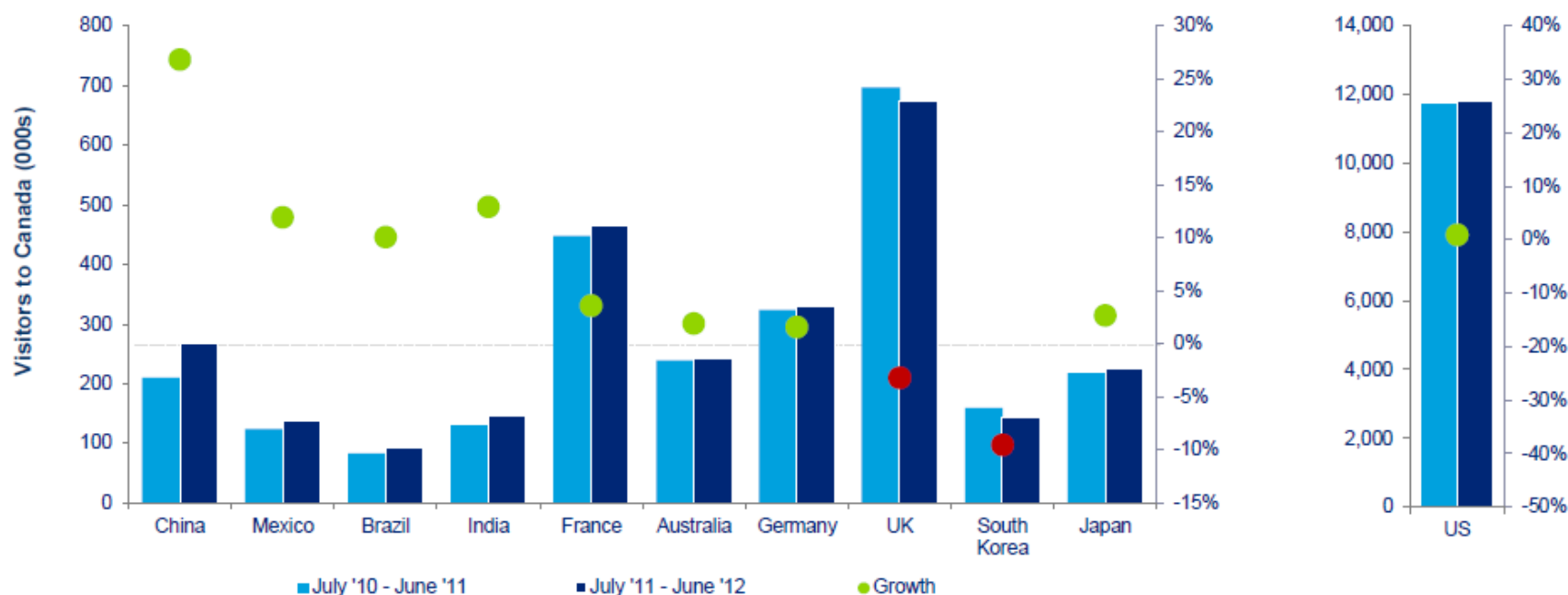
-15.9 Billion
32.9% of overall total

International Traveller



Emerging markets fuel Canada's arrivals growth

Canadian arrivals from key international markets
July 2010 – June 2011 vs. July 2011 – June 2012



Source: Canadian Tourism Commission – Tourism Snapshot

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冬の成田/カルガリー直行便

エア・カナダ カルガリー直行便 冬期スケジュール

AC10便
毎週 水/金/日 成田発16:55 / カルガリー着10:45
AC9便
毎週 火/木/土 カルガリー発12:25 / 成田着15:20 (翌日)

* 使用機材: ボーイング767-300 (総座席数: 211席)

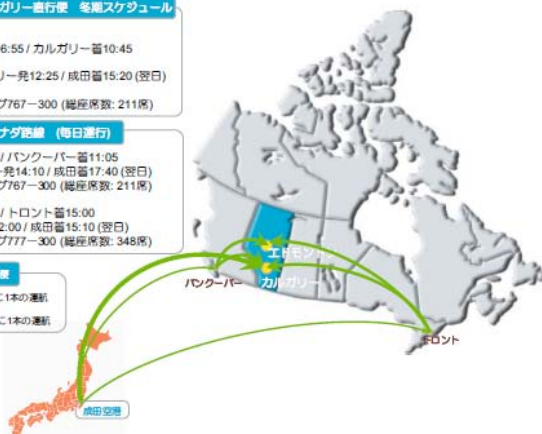
日本発 エア・カナダ路線 (毎日運行)

AC4便 成田発19:10 / バンクーバー着11:05
AC3便 バンクーバー発14:10 / 成田着17:40 (翌日)
* 使用機材: ボーイング767-300 (総座席数: 211席)

AC2便 成田発17:00 / トロント着15:00
AC1便 トロント発12:00 / 成田着15:10 (翌日)
* 使用機材: ボーイング777-300 (総座席数: 348席)

バンクーバー乗り継ぎ便

カルガリー: ほぼ1時間に1本の運航
エドモントン: 1~3時間に1本の運航



Tourism Marketing



About the CTC

We inspire the world to explore Canada, focusing on the extraordinary experiences this country has to offer.

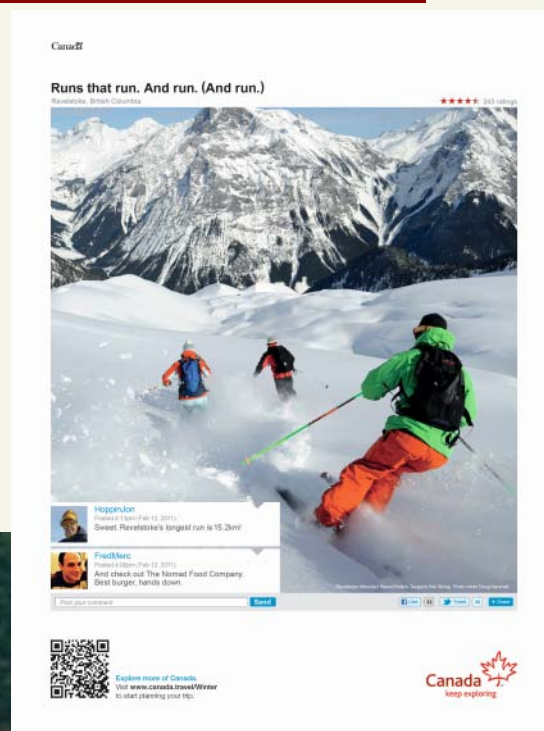
Key Competitive Challenge: Marketing Investment

Country	Budget	Budget Growth	Growth in arrivals from key markets 2011/96
Ireland	\$211M	↑	14%
Mexico	\$153M	↑	4%
Australia	\$147M	↑	30%
Malaysia	\$128M	↑	257%
S. Africa	\$118M	↑	7.30%
France	\$112M	↑	13%
Korea	\$94M	↑	158%
NZ	\$89M	↑	83%
Brazil	\$84M	↑	100%
Switzerland	\$80M	↑	23%
CANADA	\$72M	↓	-10%

- All of Canada's major competitors are making greater investments in tourism marketing.
- However, by cutting the CTC's budget Canada is moving in the opposite direction.

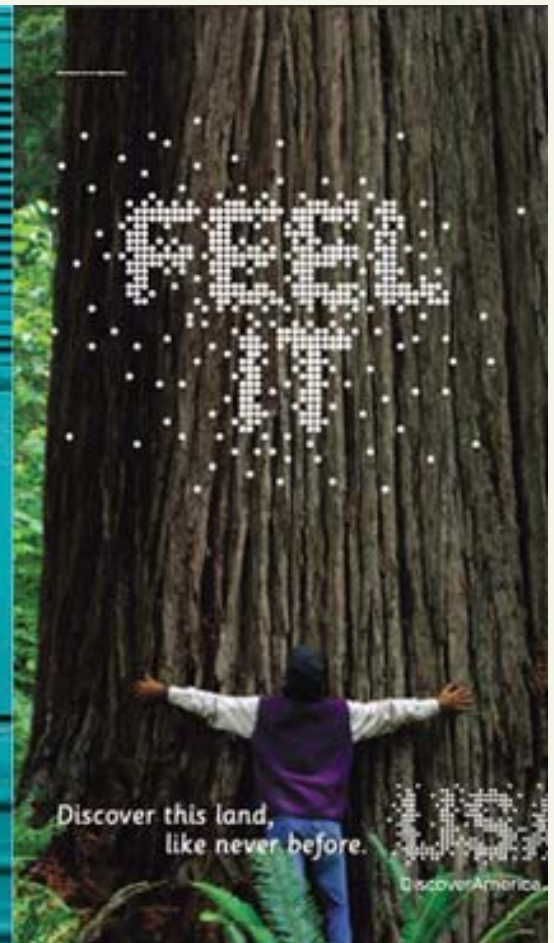
Slated to decrease to \$58M in 2013-2014

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As a world-class leader in tourism research and intelligence, we let the facts and figures do the talking.

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THANK YOU

