

# Navigate

New directions in tourism, hospitality and leisure

Volume 4 | Summer 2012



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TOURISM INDUSTRY ASSOCIATION OF CANADA  
ASSOCIATION DE L'INDUSTRIE TOURISTIQUE DU CANADA

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## **Navigate**

This is the fourth edition of our semi-annual publication: *Navigate*. Each issue provides a pulse on the Canadian tourism, hospitality and leisure industry and highlights future trends. Each issue also explores a “hot” topic that is having significant influence on the industry.



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## What's next?

The recent global recession and continued economic uncertainty have underscored the importance of adapting and reinventing traditional tourism product. Consumers in certain parts of the world are still holding on to their money and travelling differently, less often, and more targeted than ever. The global tourism industry did, however see some growth in 2011. With arrivals growing by 4.6% and receipts exceeding the \$1 trillion mark for the first time in history.

Modest arrivals growth continued for Canada in 2011 and was driven by non-traditional, emerging markets. Arrivals from China saw a 25% increase in 2011 due to the recent Approved Destination Status, while Brazil, India and Mexico all saw growth of over 9%. On the flip side, we are seeing a continued decrease in travellers from some of our more mature markets; namely the U.S., U.K. and Germany. With our larger source markets shrinking, we are relying more and more on emerging markets to drive our arrivals growth, and we expect this trend to continue for some time.

Our survey of Canadian travellers is showing a cautious outlook for both domestic leisure and business travel. 62% of Canadians suggest that they are as likely to take a personal vacation in the coming 12 months compared to 46% a year ago. Also, 30% of travellers are more likely to take a personal vacation, compared to 41% this time last year. This outlook is consistent for Canadian domestic business travel.

In this edition of *Navigate*, we take a close look at food and beverage offerings and culinary tourism. We learned that 35% of Canadians would travel primarily for culinary tourism (e.g. to attend a food and wine festival). Additionally, over 50% of Canadians consider food and beverage offerings in narrowing down their destination choice. Nationwide, Canadians are very proud of the cuisine in their own regions, becoming ambassadors to travellers looking for local cuisine suggestions.

Effective marketing can have a profound impact on a destination's profile as proven by Newfoundland and Labrador. The province's recent campaign has captured national and international attention while achieving numerous awards and driving measurable tourism results. We examine this campaign in more detail. We also have examined Germany as our hot destination. It is a well-developed tourism market that continues to improve its country's infrastructure to welcome and accommodate visitors.

We hope you enjoy this latest Summer edition of *Navigate*, and encourage any feedback or suggestions.

Sincerely,



**Ryan Brain**  
Partner and National Practice Leader  
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**David Goldstein**  
President and Chief Executive Officer  
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# A pulse on the tourism industry

Modest growth globally and in Canada

## State of the industry

- Global arrivals have increased 4.6% in 2011 vs. 2010, while receipts grew by 3.8%.
- In Canada, visits from U.S. travellers have continued to slowly decrease. Over the last 12 months (as of February 2012), visitation from the U.S. saw a decline of 1.9% compared to the prior 12 months. Canada's other key travel markets experienced an arrivals increase of 2.6% over the same period. Canada's tourism receipts increased by 1.8% in 2011 compared to 2010.
- According to Smith Travel Research, the Canadian hospitality sector is experiencing increases across key performance indicators as of March, with revenue per available room (RevPAR) showing the greatest increase at 2.8%.
- Intentions appear modestly positive for domestic, U.S. and international travel. Our survey of Canadian travellers suggests that both personal and business travellers intend to travel the same as or more than last year.

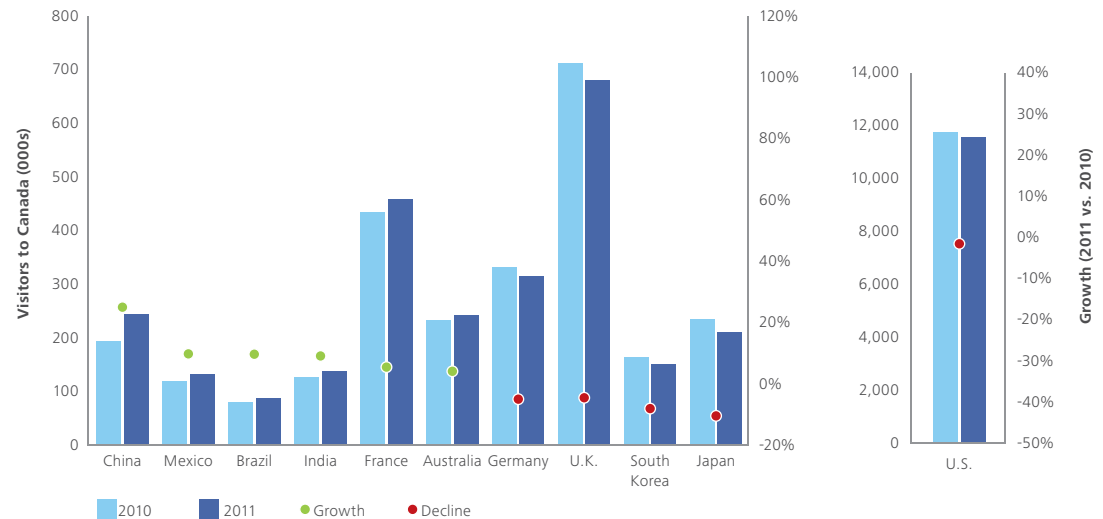
### A pulse on the tourism industry

Industry snapshot – International	
Global tourism arrivals (2011)	982M (+4.6%)
Global tourism receipts (2011)	\$1,030B U.S. (+3.8%)
Canada's international travel deficit	\$15.9B (+11.2%)
Industry snapshot – Canada	
International arrivals to Canada – LTM as of February 2012	
U.S.	19.64M (-1.9%)
All other countries	4.55M (+2.6%)
<b>Total</b>	<b>24.20M (-1.1%)</b>
Canadian tourism receipts – LTM as of December 2011	
U.S.	\$7,058M (-2.4%)
All other countries	\$9,437M (+5.3%)
<b>Total</b>	<b>\$15,128M (+1.8%)</b>
Canadian hospitality metrics	
Canadian hospitality metrics – LTM as of March 2012	
Occupancy rate	62.2% (+1.2%)
Revenue per available room (RevPAR)	\$79.90 (+2.8%)
Average daily rate (ADR)	\$127.82 (+0.9%)
Traveller outlook	
Percentage of survey respondents who are more or as likely to travel to a specified destination for a personal vacation over the next 12 months	
Within Canada	92% (vs. 88%)
To the U.S.	78% (vs. 73%)
Outside North America	65% (vs. 56%)
Percentage of survey respondents who are more or as likely to travel to a specified destination for business travel over the next 12 months	
Within Canada	84% (vs. 80%)
To the U.S.	73% (vs. 66%)
Outside North America	62% (vs. 53%)

Traveller outlook % in parentheses represent responses from Winter 2011 *Navigate* survey.  
Sources: UNWTO; Statistics Canada; Smith Travel Research; Ipsos; Deloitte analysis

Canada's growth continues to come from emerging markets, with a significant increase in Chinese travellers

Travel to Canada from key international markets January to December 2010 vs. 2011



Source: Canadian Tourism Commission

- Canada continues to see growth from emerging markets. Arrivals from China grew by 25% in 2011 due to the recent Approved Destination Status. The Canadian Tourism Commission projects double-digit growth in arrivals from China over the coming years.
- Our challenge in some of the more mature tourism source markets continues (declines seen from both U.K. and German travellers); however, the past year saw increases in arrivals from both France (our third largest source market) and Australia.
- Cross-border travel from the U.S. declined slightly.

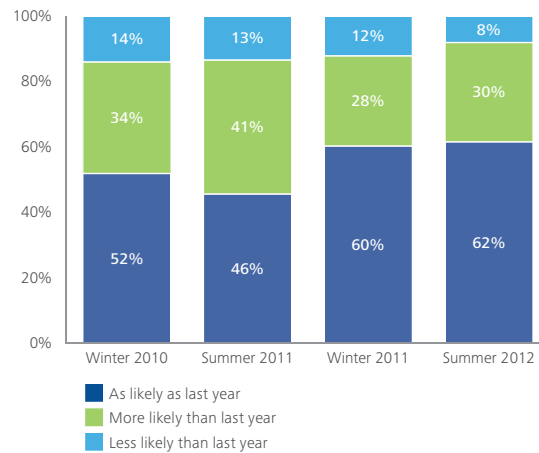


# Canadian travel outlook

Domestic travel intentions remain positive

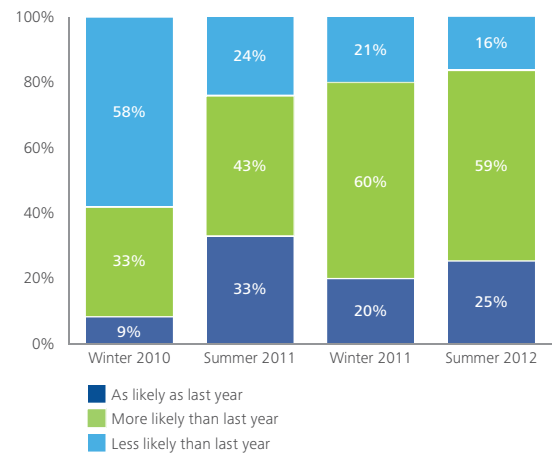
## Travel within Canada is trending positively for both personal and business travel

**How likely are you to travel within Canada for a personal vacation over the next 12 months?**



Source: Ipsos; n= 1,030

**How likely are you to travel within Canada for business travel over the next 12 months?**



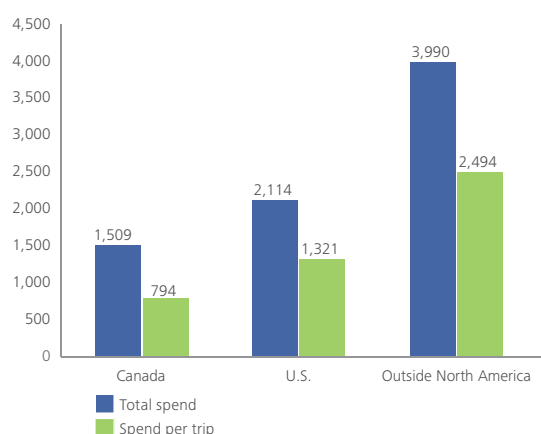
Source: Ipsos; n= 1,030

- 92% of Canadians stated that over the next 12 months they are as likely or more likely than last year to travel within Canada for a personal vacation – compared to 87% this time last year.
- 22% of respondents indicated that they are likely to travel less to the U.S. in the coming year versus the previous year (versus 27% six months ago) and 35% are less likely to travel outside of North America (versus 44% six months ago).
- Overall, longer stay (5 nights or more) trip intentions appear to be down for both domestic and international trips; shorter stays will likely drive the increase in the number of vacations this coming year. Shorter trips are expected to continue to be concentrated domestically and within the U.S. and Caribbean.
- Business travel within Canada is continuing to see a recovery, with 84% of respondents planning to travel as much or more this year versus last year.
- 62% of business travellers are as likely or more likely to travel beyond North America in the next 12 months compared to 47% of last year's respondents.



## Spending outside of Canada is expected to decrease as travellers remain budget-conscious

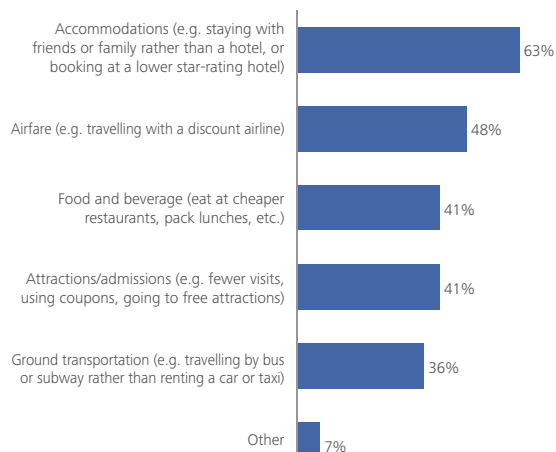
### How much money did you spend on personal travel to the following destinations in the past 12 months? (of those who travelled to each destination)



Source: Ipsos; n= 1,030

- Average annual spend for Canadians travelling domestically is \$1,509 (\$794 per trip). Spending is approximately 40% greater for trips to the U.S., and 164% greater for trips outside of North America.
- Canadians looking to save while they are travelling are most often willing to make trade-offs with their accommodations, in favour of spending elsewhere.
- Youth travellers (those aged 18 to 24) are the most willing to forgo spending at hotels, while those aged 35 to 44 are the most willing to save money on airfare, food and beverage, and attractions.

### In which areas do you typically look to save money while travelling?



Source: Ipsos; n= 1,030

- 65% of survey respondents indicated that price is their top consideration in selecting a travel destination; indicating that while intentions to travel are up, Canadians are interested in limiting their spend while doing so.
  - Travellers indicated they are planning to spend less on destinations outside of Canada in the coming year versus last year; however, fewer than 15% of respondents indicated that they are planning to spend less this coming year on domestic travel.
  - Approximately 30% of respondents indicated that they are planning to use fewer than half of their vacation days for travel away from home.

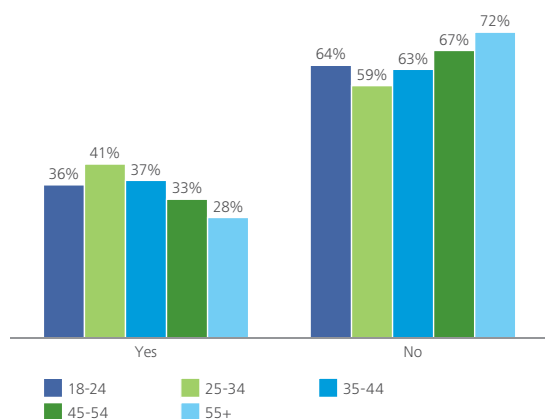
# Culinary tourism & Food & beverage

Restaurants, wineries, and other food and beverage establishments are increasingly recognizing their critical role in tourism



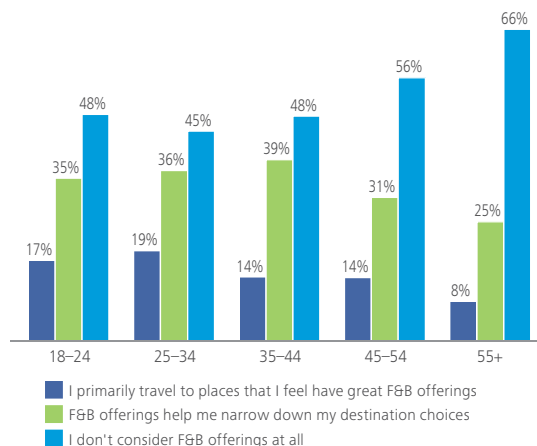
## Culinary tourism offerings have different appeal to different age groups

**Would you travel primarily for a culinary purpose?**



Sources: Ipsos, n=1,030; Deloitte analysis

**How will food and beverage (F&B) offerings influence your next vacation destination?**

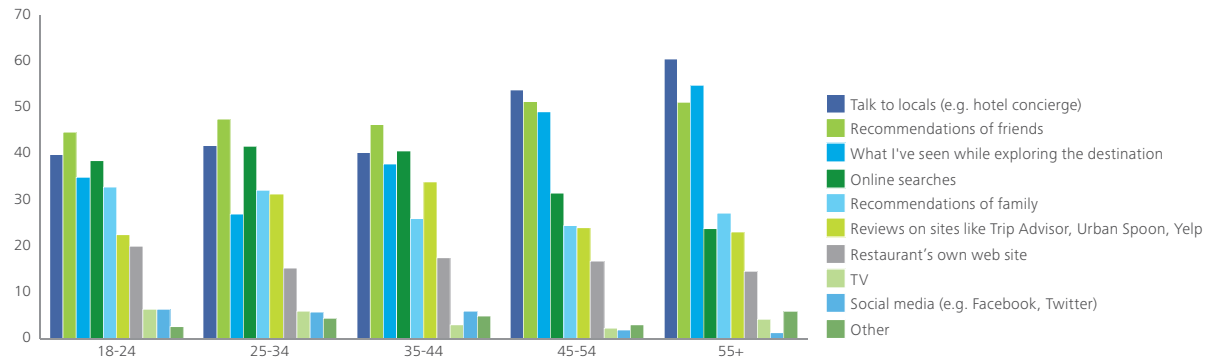


Sources: Ipsos, n=1,030; Deloitte analysis

- Approximately 35% of Canadian travellers surveyed indicated that they would travel primarily for a culinary purpose (e.g. to attend a food and wine festival), and over 50% consider food and beverage offerings in narrowing down their destination choice. South of the border, the Travel Industry Association of America recently reported that 60% of American leisure travellers indicate that they are interested in taking a trip to engage in culinary activities within the next 12 months.
- Younger Canadian travellers (those aged 25 to 34) are most influenced by a vacation destination based on its food and beverage offerings.
- To the travellers that are after a culinary tourism experience, Rebecca LeHeup of the Ontario Culinary Tourism Alliance (OCTA) indicates that these individuals are seeking authenticity and local flavours, or *a taste of place*. Defining the Canadian food experience and sourcing locally grown ingredients are increasingly important to cater to these travellers.
- As a general demographic group, it appears that older travellers are less interested in travel primarily for culinary purposes. However, there is a small but strong base of individuals in this demographic that seek high-quality travel experiences centred around food and beverage, and are willing to pay more for them. Rebecca LeHeup indicates that they value packages that combine a food and beverage experience with other features, such as accommodations or attractions.
- Conversely, the younger generation of culinary travellers are eager to spend on food and beverage, but places lower importance on things like packages and accommodations – unique offerings and customized itineraries may prove more important to this demographic.

## Travellers are keen to seek and share recommendations

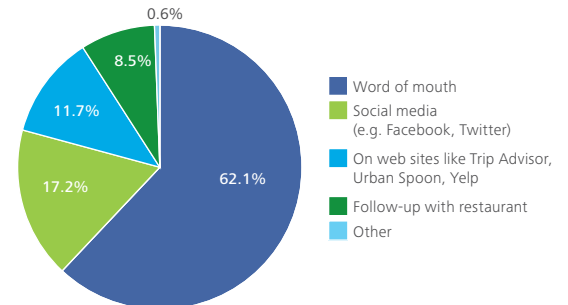
### What are the primary sources of information you use to help you select a F&B establishment while travelling?



Sources: Ipsos, n=1,030; Travel Industry Association of America; Deloitte analysis

- Travellers rely significantly on recommendations when selecting food and beverage establishments: 77% cite recommendations from family or friends as a primary source of information.
- Online searches and online review sites are most popular among those aged 25 to 44, while younger travellers use social media and TV for information, and older travellers rely heavily on speaking with locals and what they've seen while exploring the location.
- Approximately 80% of travellers surveyed indicated that they are likely to share their food and beverage experiences. Notably, those aged 35 to 44 have a greater propensity to share their experiences.
- The preferred mode of sharing is word of mouth at 62%, while online means account for 29% of sharing (including social media and travel web sites). Social media is a popular tool for those surveyed under 45 years of age at 83%, while word-of-mouth is more popular for those 55 and older.

### Methods used to share F&B experiences



Source: Travel Industry Association of America

- According to the Travel Industry of America, 70% of culinary travellers enjoy bringing back regional foods, recipes, wines, etc. from places they have visited to share with family and friends, which is a powerful way to share their experience.
- The increasing presence of food blogs and food experience-sharing through other social media outlets has made pre-trip research easier and more reliable than in the past.

## Price reigns supreme in the food and beverage decision

### What are your most important decision criteria when selecting a F&B establishment while travelling?

Top five selections	Age ranges				
	18-24	25-34	35-44	45-54	55+
	1	Price	Price	Price	Price
	2	Location	Selection	Selection	Selection
	3	Selection	Location	Location/availability of local cuisine	Location
	4	Recommendation	Recommendation	Atmosphere	Location/availability of local cuisine
	5	Atmosphere/availability of local cuisine	Availability of local cuisine	Recommendation/availability of local cuisine	Recommendation

Sources: Ipsos, n=1,030; Deloitte analysis

- Consistently across age groups, price, selection and location are the top criteria in selecting a food and beverage establishment while travelling.
  - Price becomes less important with age (79.5% for 18 to 24 year olds vs. 60.9% for 55 and older) and greater importance is given to intangibles such as service (12.3% vs. 22.7%)
  - Travellers from Quebec are more price sensitive than other regions and value recommendations and location ahead of selection
- In terms of selection and availability of local cuisine, more than twice the number of travellers surveyed prefer to dine at independently-owned restaurants versus chain restaurants, supporting the demand for an authentic, *taste of place* experience. It is clear that the dining experience extends beyond the consumption of food, but also to the consumption of the destination.
- Results suggest that while travellers place value on experiencing local cuisines they may be constrained by other factors – namely price and location.
- In particular, location is a challenge for Canada. Rebecca LeHeup of OCTA indicates that a primary barrier to experiencing Canada's offerings is access: many offerings are "off the beaten path" and require planning in advance and/or alternate travel arrangements (e.g. a car rental) to experience.
- Organizations should recognize that there are differing behaviours across traveller types. Some may indulge in a more expensive meal on occasion while travelling, but generally focus on minimizing food and beverage costs. There are also foodies (people for which food and beverage is core to their travel experience) who are less price sensitive and are willing to pay for a unique culinary experience.

## Canadians view our culinary offerings as comparable with other destinations, and have pride in their regional fare

- Overall, Canadians feel that we have a culinary experience comparable to that of other countries, rating our various offerings (e.g. fine dining, independent restaurants, etc.) on par with those in other destinations.
- Rebecca LeHeup indicates that Canadian culinary offerings can see value in distinguishing themselves to create an identity for the Canadian food and beverage experience – equally applicable on both a domestic and international scale.
- Canadians surveyed consistently indicated that their home region has the best food and beverage offering in Canada. This pride of place is positive news for within-province travel, and also indicates that Canada and its local/regional offerings have many brand ambassadors.
- This can prove important in growing local tourism, as well as leveraging the tendency of word-of-mouth recommendations to encourage out-of-province or out-of-country friends and relatives to experience various offerings.

### Overall, which province do you believe has the best F&B offerings in Canada?

Resident province/ region of participants	Preferred province/region				
	Western Canada	Ontario	Quebec	Atlantic Canada	
	Western Canada	67%	10%	6%	7%
	Ontario	10%	59%	5%	28%
	Quebec	15%	19%	84%	17%
	Atlantic Canada	8%	12%	5%	48%

Sources: Ipsos, n=1,030

## Catering to the foodie

Restaurants, wineries, and other food and beverage establishments are increasingly recognizing their critical role in tourism. This involves catering to both the domestic or local traveller (which accounts for approximately 80% of Canada's travel market) as well as international visitors. Establishments have increasingly sought to make dining more experiential in nature by offering the following:

- Connecting with the on-site chef to include an exclusive element to the culinary experience, which has led to the increase in chef's table concepts
- Taking part in an experience akin to foraging, which includes learning about the local landscape and sourcing of ingredients, that is often paired with an accommodation
- Promoting farmers' markets to travellers
- Incorporating a culinary element in an attraction package – for example, the Canadian Tourism Commission has included food and beverage offerings in its Signature Experiences Collection of travel experiences
- Hosting introductory and/or lower-cost tasting sessions to appeal to those that have not previously participated in culinary tourism activities (e.g. Winterlicious restaurant promotions)

With input from Rebecca LeHeup









# Tourism marketing success & Newfoundland & Labrador

Visitors are flocking to Newfoundland & Labrador as  
a direct result of their tourism marketing campaign

Newfoundland and Labrador is considered one of Canada's most intriguing destinations by both international and domestic travellers. It is effectively implementing a winning combination of marketing, access (including additional capacity across air and sea travel) and product, resulting in strong visitation and growing awareness and interest from a wide range of travellers. More specific to marketing, the Government of Newfoundland and Labrador has developed a tourism marketing campaign that has garnered significant acclaim within the industry and has resulted in measurable increases to the province's tourism industry. The campaign entitled Find Yourself was developed in partnership with Target, an award-winning St. John's-based marketing and advertising firm.

First launched in 2006, the Find Yourself campaign is a multi-media campaign utilizing print, radio, television, online and social media. To date, there have been 14 chapters in the television campaign, the most recent being Iceberg Alley and Secret Place which were released in January 2012. The goal of these chapters is to paint a more complete picture of the unusual, unexpected and compelling differences which make Newfoundland and Labrador a natural, yet surprisingly exotic destination, going far beyond the packaged, programmed tourism experiences other places offer.

### The impact

- In 2010, the province welcomed an unprecedented 518,500 non-resident visitors, an increase of 7.3% over the previous year and more than the total population of the province.

- In 2010, inbound direct seat capacity to the province increased 10% compared to 2009 (over 1 million seats total in 2010), and new investment of \$521 million in 2010 was used to renew the Marine Atlantic fleet and shore facilities, including two new vessels, increasing capacity to the province by 40%.
- It is estimated that there are approximately 13,000 people in the province whose employment is directly attributable to tourism spending. The industry also supports over 2,400 small and medium sized enterprises.
- Based on Canadian travellers surveyed for this report, the majority of the majority of respondents in all regions of Canada (except Quebec) have seen elements of the campaign. It is clearly having an impact on travellers with 66% of respondents noting that after seeing the campaign they are more likely or somewhat likely to visit Newfoundland and Labrador.

### The recognition

- As of February 2012, the campaign has won 147 awards, including the country's most prestigious advertising award – a Grand Prix CASSIE (Canadian Advertising Success Stories). The CASSIEs not only recognize creative design, production and content, but reward tangible results of an advertising campaign such as tourism numbers and spending.
- Other awards include two TIAC (Tourism Industry Association of Canada) Marketing Campaign of the Year awards (2007 and 2011) and a Canadian E-Tourism Award for Best Website (2011).

Sources: Department of Tourism, Culture and Recreation, Government of Newfoundland and Labrador; Statistics Canada; Ipsos, n=1,030



Destination profile

# Germany

Rich in natural beauty and culture, Germany ranks among the top in world-wide travel destinations

Germany is outperforming many traditional travel markets, disproving the notion that only new destinations are winning the hearts of today's traveller. While emerging destinations such as Turkey and Vietnam attract much attention due to their growth and new product, Germany has proven that well established markets can effectively attract today's traveller by putting a new twist on something old, and effectively combine marketing, access and product in new and exciting ways. Home to world class cities and one of the largest economies in the world, Germany is seeing an increase of international visitors. World-renowned for its beer, wine and diverse cuisines, along with its infrastructure being among the best in the world, are a few of the reasons this country has maintained its staying power and is aggressively targeting 70 to 80 million annual visitors by 2020.

#### Marketing investment and partnerships

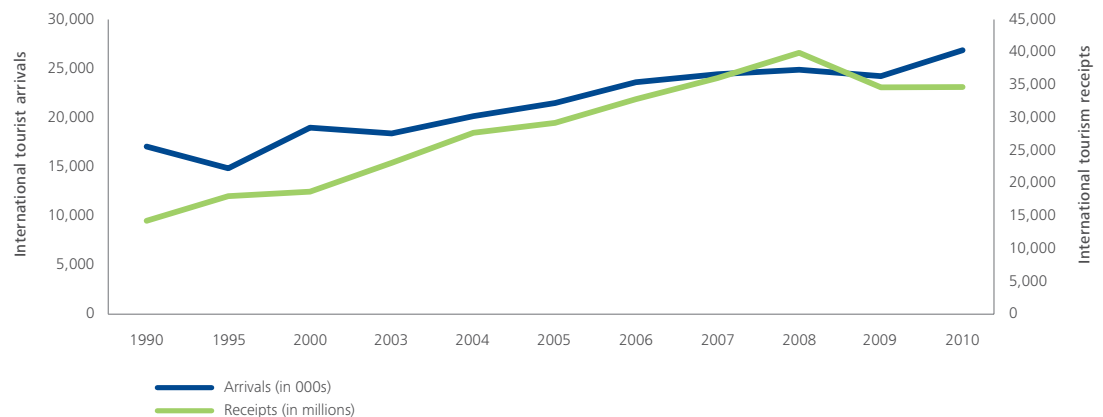
- In 2010, Germany's national tourism promotion organization, the German National Tourist Board (GNTB), spent 22.3 million Euros in marketing that fuelled a 6% increase in visitation the following year (63.8 million overnight stays by international travellers in 2011).

- Germany's 2012 theme for marketing promotion, developed by GNTB, is "Germany: open for business" which promotes business travel. They have also developed two major product lines to drive tourism: City Tours/Events and Health & Fitness Holidays.
- GNTB's recent alliances with visitBerlin and IHB Travel GmbH supports Germany's position as one of the world's premier business travel destinations. They currently have 66 members and twelve sponsors to support tourism internationally.

#### Strong investment in infrastructure

- Germany continues to invest in maintaining and growing its current infrastructure by focusing on programs to secure and improve the quality of its airports, roads, rails and waterways. The government has maintained its transport investment expenditures at around 9.75 billion Euros in their 2011 to 2014 plan. Germany currently has over 12,800 kilometres of autobahn, over 37,900 kilometres of rail network and over 40 airports, making it easy to navigate through the country.
- Traffic revenue at the country's international airports has increased by 4.7%, with 26.9 million international arrivals in 2010. It is projected to increase further with the opening of Germany's newest airport – Berlin Brandenburg Airport – in June, 2012.

#### Germany's international tourist arrivals and tourism receipts



### Food and beverage

- Germany is widely known for its beer and beer crafting skills (a large part of their culture), wine (from their 13 vineyards) and its diverse cuisine.
- The famous Oktoberfest beer festival, which is held from mid-September to the first Sunday in October, attracts over 6 million visitors each year.
- The annual Berlin Beer Festival is the longest beer garden in the world, featuring over 2000 types of beer from over 300 breweries and 86 countries.
- Germany offers specialty cuisine within each region including fish in the north, fruit from the orchards of the Altes Land, potato dumplings in eastern Germany, sauerbraten in the western Rhineland, and egg noodles and sweet treats in the south.

### Germany's thriving capital is the third most popular travel destination in Europe

- Berlin, Germany's capital and largest city with a population of approximately 3.4 million, is a world class city that is rich in history with galleries, museums, operas and famous landmarks.
- GNTB's recent alliance with visitBerlin showcases Berlin's importance in world class travel, with a total of 9.8 million people visiting the city last year and 22.4 million overnight stays. Compared to 2010, this is an increase of 9% in arrivals and 7.5% in hotel nights.
- Over 20 years after the fall of the Berlin Wall, with a new airport close to completion and luxury world class hotels underway, Berlin is increasing in popularity – seeing an influx of international visitors.

## Performance highlights

- Largest European country population at approximately 82 million
- Top 10 of 50 world-wide destinations; ranking 9<sup>th</sup> for tourism image
- Hosts two thirds of the world's flagship trade fairs
- Over 6400 world class conference hotels, convention centres and event venues
- Ranked 2<sup>nd</sup> out of 139 countries in the Travel & Tourism Competitiveness Index conducted by the World Economic Forum in 2011
- Ranks 6<sup>th</sup> in receipts and 8<sup>th</sup> in arrivals according to UNWTO rankings in 2010
- Lufthansa won the 2011 World Travel Awards for World's Leading Airline to Europe
- Ranked highly for the quality of its transport infrastructure; ground (3<sup>rd</sup>) and air (7<sup>th</sup>)
- 5<sup>th</sup> largest economy in the world, in terms of purchasing power parity, and Europe's largest
- 2011 GDP is about \$3 trillion U.S.; ranked 6<sup>th</sup> world-wide
- Dining, along with sightseeing and shopping, is noted as one of the top holiday activities in Germany as surveyed by GNTB/WTM
- July to September are peak season times for tourism
- Berlin is the 3<sup>rd</sup> most popular travel destination in Europe; after London and Paris, and before Rome

Sources: UNWTO; GNTB/WTM; CIA; World Economic Forum; [www.berlin-airport.de](http://www.berlin-airport.de); Federal Ministry of Economics and Technology (Germany)

# Methodology

Deloitte's Tourism, Hospitality & Leisure team and the Tourism Industry Association of Canada (TIAC) research and identify key travel trends across the Canadian and global marketplaces.

In March 2012, we conducted an online survey, which polled 1,030 Canadians aged 18 to 65+, to gauge their insights on future travel trends.

### The survey panel (travellers)

Gender		Geography	
Male	48.4%	Western Canada	29.9%
Female	51.6%	Ontario	38.3%
Age		Quebec	24.4%
18 – 24	8.6%	Atlantic Canada	7.4%
25 – 34	19.2%	Household income	
35 – 44	19.2%	Under \$50,000	29.1%
45 – 54	20.5%	\$50,000 – \$99,999	37.0%
55+	32.4%	\$100,000 – \$149,999	12.4%
		\$150,000 – \$199,999	4.9%
		\$200,000+	1.6%
		Total respondents	
		1,030	



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