Welcome to Berlin
ITB EXHIBITOR BRIEFING 2014
Economic Indicators:

- Germany continues to be the powerhouse in the EU
- GDP forecast for 2014 = 1.8 – 2%
- Unemployment rate = under 7%

*http://www.bbc.co.uk/news/world-europe-23028075*
Dynamic mood in Germany

- Consumption index on a 7-year high
- Business index is on a record level (110.6 points)
- Germans are supposed to spend 1.5% more than in 2013

*http://www.bbc.co.uk/news/world-europe-23028075*
German Travel Indicators

Germans are still world travel champions when it comes to expenditures of 84 billion US$

Source: PhocusWright.
Travel Trade Landscape

- More than 100 German TOs are selling Canada
- 13 identified key accounts (A, B, C)
- Approx. 10,400 travel agencies
- Travel bookings 2014 are a hybrid - but more ROPO for Canada

*http://www.bbc.co.uk/news/world-europe-23028075*
German Market Performance

Overnight person-trips and spending by German visitors to Canada, 2008-2014

Person-trips (left axis)  Spending (right axis)

Source: Statistics Canada, International Travel Survey; CTC Research forecast.
Competitor’s Market Performance

Outbound travel from Germany to competing markets

- United States
- China
- South Africa
- Australia
- New Zealand

Source: Oxford Economics, Tourism Decision Metrics.
Canada’s Market Performance

- Canada is perceived as a top destination to visit
- 63% of German visitors to Canada are likely to recommend Canada to friends and family
Motivations

- A place where I would feel welcome
- Provides unique holiday experiences
- Lots of once-in-a-lifetime experiences
- An exciting place
- Lots of things to see and do
Barriers

- Affordability (44%)
- Would rather visit other places (26%)
Trip Planning

Combination of traditional and online sources

- Travel agent (49%)
- Book online after consulting a travel agent (18%)
- 81% of visitors shared their trip experiences while travelling
Some German “Zeitgeist”

- Increasingly blurred line between work and home life
- National conversation about cost of burnout and hyper connected work culture
- Result: Many German companies have imposed a ban on emails after work.

✓ A chance for Canada as THE destination of slow movement!
Travel Trends

- Power of places
- Power of People
- Every tourist is a tourism expert
Current Business Outlook

- Strong summer → obvious increase of turnover
- Early bookings
- Generally positive expectations
GOAL

- Convert high yield customers through tactical messaging – move these potential travellers* from the ‘Seriously Considering’ stage to the secondary ‘Vacation Movie’ stage and then to primary ‘Purchase’ stage.

DURATION

- Mid January to end of February 2014
CTC 2014 Spring Advertising Campaign

- Ensure messaging has the maximum effect
- Leverage best-in-class media from 2013
- Explore new integrated media opportunities
- Develop integrations of dynamic online/tablet formats and further video options.
- Seek value added opportunities to extend reach and distribution of content.

PARTNERS

Travel Alberta, Aboriginal Tourism British Columbia, various German tour operators
2014 Campaign Creative
New Digital Media

Fairfax Arch
http://youtu.be/ukQV7SuClw0

Lonely Planet Pushdown
http://youtu.be/E1CKn5Uxe98

Newsnet Lumberjack
http://youtu.be/OrJ-HK0h-to

Billboard 2
http://youtu.be/M1StubGYfBs

FAZ Advertorial
http://youtu.be/QtVTKbj11TQ

FAZ Tablet
http://youtu.be/9yO6UkXeEtY

Vibrant Media
http://mydemo.vibrantmedia.com/page.html?id=52d3cb859a9c870ca449161a

Cascade
http://youtu.be/1nF2gwDaWLo

SayMedia
http://youtu.be/oa7JMgeTezM
Key Account Activities

- 24 promotions carried out with key accounts in 2013
Key Account Activities: Conditions for Coops

- Must participate in RVC and CSP
- Must use CTC branded visuals
- Activities should complement the CTC campaign in terms of timing and distribution channel
- Full sales report upon completion
Key Account Activities

- CSE competition among tour operators
- 3 winning concepts will be awarded during the ITB Embassy event
Canada Specialist Program

Please meet Barbara, one of our specialists.
Canada Specialist Program

CURRENT NUMBERS

- 1075 Canada Specialists
- 2,430 registered participants in total
Canada Specialist Program

- CSP Mega Fam Trip
- CSP Event
Public Relation – Media Landscape (print)

• Despite of the fact that 2/3 of Germans shop online,
• 82 % of the population still read print

Please meet journalist Jennifer Latuperisa
Media Landscape Social Media

- Germans love to share their news on
  - Facebook (85%)
  - Twitter (12%)
  - Google Plus (3%)

- For Germans, travel is the most important topic on FACEBOOK!
Cultural differences amongst media

Social Journalism Länderbarometer 2012/13

Cision's 'Social Journalism Barometer 2012/13' is a measure of the Social Media Fitness of journalists in a country. The Barometer is the result of an analysis of journalists' practical application of social media in the context of their work, knowledge of journalistic social media, and overall attitude towards social media.

GESAMTWERTUNG

RANKING

1. Kanada
2. USA
3. Vereinigtes Königreich
4. Schweden
5. Australien
6. Frankreich
7. Finnland
8. Deutschland
Qui volestiunt et quibus

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Qui volestiunt et quibus

*AUTOR 2* num saecus aliquam volorpos venisi bea id eatur rem intibus atur mo ipidit eseqm, in pro quo te re evelendem a doles venimus est lamus as derum fugitatem in cus. Dios el explabo rehendi temporunt end
Public Relations: Group Press Trips 2014

February: Ski the Canadian Rockies (AB)

June: Créativité et Savoir Vivre Québécois

July: Yukon Ride & Raft

August: First Nations of Ontario

September: Celtic Colours in Nova Scotia
Das Traumschiff / The Dreamboat goes QB/ON
**Globus Award 2013**

**Bester Reisebüro-Service Tourist Boards***

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<th>Platz</th>
<th>Land</th>
<th>Prozentsatz</th>
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<td>17,9 Prozent</td>
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<td>2</td>
<td>Spanien</td>
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<td>Malta</td>
<td>13,9 Prozent</td>
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<tr>
<td>9</td>
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*Stimmanteil unter den Top Ten, Abstimmung von 894 Reiseverkäufern auf [www.touristik-aktuell.de](http://www.touristik-aktuell.de) im Herbst 2013*
Please meet the producers of PR-Handbook in Germany
Happy 48th ITB!