



ATTRACTION

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The International Association of Travel Research and Marketing Professionals - Canadian Chapter
L'Association internationale des professionnels de la recherche et du marketing en matière de voyages - la section canadienne

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TTRA Canada 2005



The Canadian Chapter
of the
Travel and Tourism
Research Association
La Section canadienne
de l'Association de
recherche sur les voyages
et le tourisme



The Canadian Chapter
of the Travel and Tourism
Research Association

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PRESIDENT'S MESSAGE

from Marion Joppe - School of Hospitality & Tourism Management , University of Guelph

Since my return to the Board of Directors in 2001, we have worked diligently to improve both the membership benefits and the quality of our annual conference, the most significant benefit. My predecessors, Greg Danchuk and Martin Wings, had made significant strides in both these regards.



The highly successful TTRA International Conference in Montreal last year is very much a case in point: with close to 400 delegates and a large contingent of Canadians, we have proven once again that conferences

hosted by TTRA Canada are the most successful and financially rewarding for TTRA International! It also allowed us to start out the year with 151 members, up from 127 last year.

But we cannot rest on our laurels, and this year's conference in Kelowna is targeted to be our most successful Canadian conference yet. Certainly, with some 40 submissions received by the end of March – six months before the conference! – the presentations are bound to be of the highest quality. We are also looking to strengthen several components of the conference, such as the Academic Roundtable, and possibly introduce a special stream for students to continue TTRA Canada's role in mentoring the next generation of researchers.

We are also planning to develop occupational standards for tourism researchers. Occupational standard describe the skills, knowledge and attitudes necessary for competent performance in a specific tourism occupation. They are a job analysis or job profile that contains criteria-based performance statements, knowledge requirements of the job and contextual information. Standards are

benchmarks against which occupations and the proficiency of people in those occupations can be assessed. With tourism researchers now working in a large variety of organizations, and often as the only person responsible for the research function, a more standardized approach to assessing what expertise they bring to the job will be helpful for employers. This project has elicited great interest from the Canadian Tourism Human Resource Council and the Marketing Intelligence and Research Association (created through the merger of three organizations, the Professional Marketing Research Society (PMRS), Canadian Association of Marketing Research Organizations (CAMRO) and the Canadian Survey Research Council (CSRC)).

This year's TTRA International conference in New Orleans is starting to take shape and I hope that quite a few of you will be able to make it. We will host a Canada chapter meeting at the conference hotel to provide an opportunity for the Canadians in attendance to network and catch up on the events in the Canadian research community.

I look forward to a very active and interesting year as the Board engages in its initiatives, and hope to see as many of you as possible in Kelowna in the fall.

Marion Joppe, *President*
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MOT DE LA PRÉSIDENTE

Depuis mon retour au sein du conseil d'administration en 2001, nous avons travaillé avec ardeur afin d'améliorer les bénéfices aux membres et la qualité de la conférence annuelle, le gain le plus significatif. Greg Danchuk et Martin Wings mes prédécesseurs ont fait des efforts remarquables en ce sens.

Nous avons su prouver encore une fois que les conférences internationales organisées avec l'aide de TTRA Canada sont celles qui connaissent le plus de succès et qui s'avèrent les plus rentables.



L'immense succès de la conférence internationale de TTRA à Montréal l'année dernière démontre, démontre bien nos efforts puisqu'elle a attiré près de 400 délégués dont une large part de Canadiens. Nous avons su prouver encore une fois que les conférences internationales organisées avec l'aide de TTRA Canada sont celles qui connaissent le plus de succès et qui s'avèrent les plus rentables. Cette réussite nous a aussi permis d'amorcer notre année avec 151 membres comparativement à 127 l'an dernier.

Toutefois, nous ne devons pas rester assis sur nos lauriers. La conférence canadienne de cette année à Kelowna devrait connaître le plus gros succès jamais connu. En effet, près de 40 propositions de présentation ont déjà été reçues en date de fin mars, soit six mois avant la conférence ! Les présentations devraient être de qualité exceptionnelle. Nous songeons à renforcer certains éléments de la conférence tels, la table ronde académique et la possibilité à la possibilité d'y introduire un volet dédié aux étudiants afin de poursuivre le rôle de mentor que joue TTRA Canada auprès de la prochaine génération de chercheurs.

Un autre objectif est de développer un répertoire de normes professionnelles en

recherche touristique. Ce répertoire décrirait les compétences, les connaissances et les aptitudes exigées pour chaque emploi et contiendrait aussi de l'information contextuelle. Ce serait une analyse qui mettrait en perspective les critères de performances et les connaissances requises pour l'emploi. Ces normes serviraient aussi de repère pour mieux évaluer l'expertise et la capacité des sujets appelés à remplir certains postes. En tant que chercheurs touristiques oeuvrant dans une grande variété d'organisations et souvent les seules personnes responsables en matière de recherche, une normalisation permettrait de catégoriser les individus selon leurs compétences et leurs aptitudes, ce qui faciliterait grandement la tâche des employeurs. Ce projet a particulièrement suscité l'intérêt du Conseil Canadien des Ressources Humaines en Tourisme, de l'Association de Recherche et d'Intelligence Marketing et du Conseil Canadien de Recherche par Sondage.

La conférence de TTRA International de cette année en Nouvelle-Orléans prend forme et j'ose espérer que plusieurs d'entre-vous pourront s'y rendre. Nous tiendront une réunion du chapitre canadien à l'hôtel de la conférence afin d'offrir aux délégués canadiens une opportunité de réseautage et les mettre à jour sur les différentes nouveautés au sein de la communauté de recherche canadienne.

J'attends avec intérêt la prochaine année qui s'annonce très active et fort intéressante au sein du Conseil d'administration puisque déjà, ce dernier met en branle ses initiatives. J'ose espérer vous voir en grand nombre à Kelowna cet automne !

A BRAVE NEW WORLD: CHANGES IN DOMESTIC TOURISM MEASUREMENT FOR CANADA

Judy Rogers – President, Research Resolutions & Consulting Ltd.

It was always the intention of the WTO to capture the “reason the trip took place” rather than the reason a randomly selected respondent “took the trip”.



Commencing in 2005, domestic tourism measurement in Canada will change in some fairly dramatic ways. At the direction of the Task Force on Domestic Tourism, headed by Alex Athanassakos of Ontario’s Ministry of Tourism and Recreation, tourism researchers from the CTC, Statistics Canada and other provincial/territorial representatives have designed a new domestic tourism survey that will measure tourism by residents of Canada starting in January 2005.

How is the TSRC different from the CTS?

The new survey -- Travel Survey of Residents of Canada (TSRC) -- differs from the historical domestic survey -- Canadian Travel Survey (CTS) in several key ways.

1. The TSRC includes questions designed to do a better job of filtering in tourism trips and filtering out routine trips and those in which the respondent does not think that the trip took him/her out of the “usual environment”.
2. Routine household/grocery shopping, medical/dental appointments, religious observance, sales calls, along with exclusions covered in the CTS such as commuting to work or school, military or diplomatic trips and those made to move to a new residence are deemed non-touristic trips in the TSRC. The TSRC also excludes trips made to help someone else move to a new residence, in keeping with the change in “main purpose of trip” (see below).
3. “Out-of-town” replaces the distance minimum for overnight trips as a way to operationalize leaving the usual environment in the TSRC. Thus, when Statistics Canada produces estimates of overnight travel collected in the TSRC, “non-routine” overnight trips will be included, so long as the traveller believes he or she went “out

of town”. (Even though information on all qualifying overnight trips is collected in the CTS, Statistics Canada has historically filtered out trips under the 80 kms threshold when it produces estimates for domestic tourism.)

4. In the interests of reducing the number of very short out-of-town same-day trips residents of Canada may take, a minimum one-way distance of forty kilometres (40 kms) is required for a non-routine same-day trip to qualify as a tourism trip.
5. In the TSRC, “adults” are defined as individuals 18 years of age or over. In the CTS, adults were defined as individuals 15 years of age or more.
6. It was always the intention of the WTO to capture the “reason the trip took place” rather than the reason a randomly selected respondent “took the trip”. This may sound subtle . . . and it is. It is also important: a trip is organized because someone has a business meeting or business conference. The respondent goes along on the trip “for fun”. The trip reason is business. The respondent reason is pleasure. In the CTS, the trip would likely have been categorized as “pleasure” but in the TSRC, the trip would be considered “business”.

These changes, and particularly the shift from a distance minimum for all trips to a more qualitative and consumer-driven approach to leaving the usual environment are felt to bring the measurement of domestic tourism more in line with the intent of the WTO guidelines for separating tourism from all travel. They also create a level playing field for tourism measurement across Canada (i.e., Ontario’s distance minimum in the CTS was 40 kms versus 80 kms in the rest of the country and in national statistical publications).

What do the changes mean?

Who knows!! It is reasonable to presume that once many of the routine shopping and medical/religious trips made by Canadians are excluded from “tourism”, the volume of trips reported may decline relative to the CTS. Similarly, the reduction in the size of the “adult” population from all Canadians 15+ to all Canadians 18+ will likely have a downward influence on TSRC estimates vis à vis CTS estimates.

How will we measure change over time between 2004 and 2005?

The TSRC represents a break in the series of domestic tourism measurement for all jurisdictions in Canada. In essence, the measurement of domestic tourism “starts

over” in 2005 because the definition and the universe being measured are sufficiently different from the CTS that the measurement community is truly entering a brave new world.

Nonetheless, steps are being taken by Statistics Canada to examine whether computer modeling of CTS vs. TSRC data can produce a viable “adjustment factor” to enable those who rely on time series data to use “adjusted” CTS historical data.

Stay tuned on this one . . .

Judy Rogers is the President of Research Resolutions & Consulting Ltd. Judy can be reached at rogers.judy@sympatico.ca

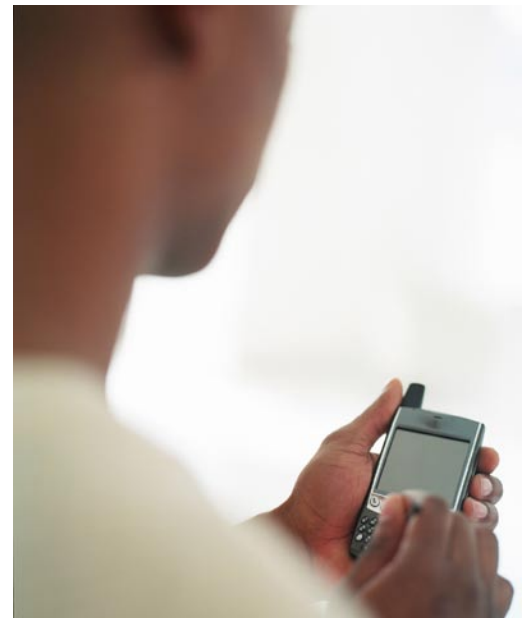
I believe we are in the very early stages of the real revolution for mobile computing in business

**OPINIONS...
THE STATE OF MOBILE SURVEY COMPUTING**

Mark Cameron – President and Co-founder, Techneos Systems Inc.

In travel and tourism research, it is often beneficial to collect survey data at the point of experience. Whether conducting interviews or self-completed questionnaires, on-site data collection provides more accurate and relevant feedback than research that is conducted at a later point in time. On-site research virtually eliminates “recollection errors”—i.e. bias or errors introduced when people are asked to recall an experience—and visitors are typically more open to providing feedback while they are experiencing something than after the fact.

In recent years many new methods have emerged for collecting field data. One such method, handheld survey computing, has evolved from a niche technology used by early adopters to a widely accepted method for on-site data collection. The adoption of handheld computers for survey research (and most other business uses, with the exception of corporate e-mail) has lagged considerably behind the consumer adoption curve. While the market for Personal Digital Assistants (PDAs) has



plateaued in the consumer space, I believe we are in the early stages of handheld adoption for business use.

Most companies have only recently accepted handheld computing as a viable platform for survey research. With current handheld devices providing power that is equivalent to—and in many ways better than—a desktop PC of the late 1990s, it is now clear that sophisticated survey projects can be conducted using handheld computers. But contrary to popular opinion, most organizations that deploy handheld survey solutions are not using the latest and greatest wireless-enabled devices, but rather deploying low- to mid-range devices that meet their functional requirements.

There are many handheld devices to choose from today, running on a variety of operating systems. The historical market leader, Palm OS, continues to hold a strong market position with a broad range of handhelds available to meet any budget. Microsoft has also made a significant dent in the handheld market with various flavours of its Windows Mobile platform (formerly Windows CE). Other key platforms include Symbian—which powers many Nokia and Sony Ericsson devices—and BlackBerry from Research In Motion. Each operating system has strengths and weaknesses, and when considering deployment of a survey solution it is essential to consider the “whole product” that you require (e.g. hardware, software, accessories, communication options and professional services).

Few would dispute that the future is wireless, and it’s exciting to see wide-area wireless data networks emerging as useable pipelines for enterprise data. But wide-area wireless data is

still a niche application in the survey research world, as the cost of devices and airtime are cost-prohibitive for many who wish to adopt the technology. Local-area wireless technologies such as WiFi or Bluetooth, which provide dependable high-speed connectivity for devices within a limited area, may be more practical and cost-effective for your survey needs. Even Infrared beaming—which is available in practically every handheld computer shipped today—can be used to connect handhelds without wires.

Wireless data does not just mean handheld web browsing. Although handheld browsers are becoming more useful for some business tasks, they are not well suited to survey data collection. A more practical solution is to utilize the native computing power of a handheld “Smartphone” (a hybrid of a PDA and a mobile phone) to provide a responsive, optimized interface for the end-user, and use the device’s wireless connection to communicate with a central server on an as-needed basis. For some this may mean sending data after each response record that is collected, whereas others may need to connect only daily or weekly.

As handheld survey computing evolves, new opportunities will emerge in travel and tourism research. I believe the availability of accurate, efficient data collected at the point of experience will lead to a new, more proactive approach to measuring customer feedback... from the real world, in real time.

Mark Cameron is the President and Co-founder of Techneos Systems Inc., a Vancouver-based software company that specializes in mobile survey software. Mark can be reached at mcameron@techneos.com.



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REGISTER FOR THIS YEAR'S CONFERENCE

**TTRA CANADA 2005:
Kelowna, British Columbia.**

LOYALTY PROGRAMS IN THE HOSPITALITY INDUSTRY

Allen Gelberg – Director of Operations, Upper Canada Hotels

What is the actual cash advantage of holding onto a good customer for an additional three, five or ten years?.



A few years ago, in an effort to realize the benefits of a customer loyalty program as promptly as possible, Vintage Inns linked itself to a coalition loyalty program, the CIBC/Aerogold. It was a way for us to tap into a population that was already predisposed to acquiring loyalty rewards and that might be inclined to switch to a corporation honoring that loyalty program.

Some of you may know that Advantex manages all aspects of the CIBC/Aerogold coalition program including direct mail, database and creative services. Advantex markets and promotes hotel and restaurant properties through a variety of marketing vehicles. During a nine month period, two direct mail campaigns were executed with the objective of driving repeat business to the Hotel properties within 30 days of an initial visit (something that is contrary to normal customer behaviour). Despite the “short” 30-day window of opportunity, the strategic use of Bonus Aeroplan Miles to drive behaviour resulted in over \$127,000 in incremental room-night revenue for the hotels. Based on the success of this “repeat business” strategy for the hotels, in 4th quarter of the year, the concept was repeated for four restaurants within the group. Results showed a 4% response and a staggering 60% lift in the average bill for repeat guests versus non-repeat guests.

Overall, despite 911, SARS, etc., we saw a steady growth of CIBC Aerogold cardholders coming to Vintage Inns hotel and restaurant properties. To accelerate and enhance that growth, Advantex created highly targeted bonus offers for accommodation and for the restaurants, driving incremental revenue at no additional cost. This enabled us to impact behavioural changes of our visitors and guests, thus gain incremental revenue within our existing hotel and restaurant capacity.

Joining an existing coalition program was just one of the ways we chose to take advantage of customer loyalty and ultimately enhance the bottom line.

Loyalty and reward programs – whether individual or coalition – work by combining

the laws of economics with human behavior. Although human behavior is far from an exact science, certain practical, objective and mathematical principles of economics can be applied to it in a retail context to answer questions such as: How do we quantify the link between loyalty and profits? What is the actual cash advantage of holding onto a good customer for an additional three, five or ten years?

The fact that loyal customers are valuable is obvious to most business people. Yet a vast number of companies are unable to ascribe a cash value to customer loyalty. Sales figures and average customer tenure, frequency of stay or spend, while helpful, draw only partial conclusions. From an accounting perspective, there is no distinction between the value of sales revenue from brand-new customers and that of long-term, loyal customers. We tend to treat investment in customer acquisition as one more current expense, instead of assigning it to specific customer accounts and amortizing it over the life of the customer relationship.

In establishing customer loyalty and reward programs, the company must view its human customers as assets, and, in so doing, can apply certain mathematical formulae to predict the behavior of these human assets.

Customer volume effect

Consider the following scenario. A company steadily adds new customers to the top of its inventory, while old customers are steadily vanishing from the bottom. If the defection rate can be slowed, the new customers gained will increase the total growth of the company at a much faster rate, known as the customer volume effect.

The cost of effectively slowing the defection rate is significantly less than the cost of acquiring new customers. Company A's customer defection rate is 15% per year while Company B has a customer defection rate of 20% per year. If both companies acquire new customers at a rate of 20% per year, Company A will have a 5% net growth of customer inventory per year, while Company B will have none. Over 14 years, Company A will double in size while Company B will have no real

growth. Furthermore, if Company A were to increase its customer acquisition rate to 30% per year while maintaining the same customer defection rate of 15%, it would double its size in seven years.

Profit per customer

In most businesses, the profit earned from each individual customer grows as the customer stays with the corporation. The benefits of loyalty can be measured by finding productivity and expense efficiencies that can be linked directly to experienced customers. To find the value of new customers, one must determine the annual profit pattern that customers typically generate through the year. To do this, one must first calculate the Customer Retention Rate and consider it in relation to the expected duration of the customer, as the following formulae indicate: If out of 10,000 customers that bought in year one, 8,000 are still buying in year two. The retention rate would be 80%.

$$\text{Retention Rate \%} = \frac{\text{Number still buying in year two} \times 100}{\text{Number who bought in year one}}$$

The retention is a necessary variable in carrying out the Customer Lifetime (or expected duration) calculation: Assuming a retention rate of 80%, the customer lifetime would be five years.

$$\text{Customer Lifetime} = \frac{100}{100 - \text{retention rate}}$$

While it is difficult to generalize spending characteristics of customers as a whole, one can differentiate among customers by age, source, profession, education and income level.

Once the data for each segment have been gathered, you can proceed to calculate what it would be worth to increase your customer retention rate, based on the real cost involved in acquiring new customers against the spending patterns of the established ones.

Other ratios

Recency/Frequency/Monetary Value (RFM) analysis, being driven by customer behavior rather than attitude, identifies customers most likely to respond to cross selling. The principal of RFM analysis is simple. A customer who made a purchase recently is more likely to buy again; a customer who buys more frequently is more valuable and more loyal, and the amount a customer spends is obviously of greater importance. Being able to identify and prevent

the loss of frequent high-spend customers is helpful in maintaining company profits.

Customer Lifetime Value (CLV) is influenced by a number of factors, including the amount spent per purchase, customer retention rate, the profitability of the products bought and costs incurred in making the sale.

Corporations can also experience the benefits of customer loyalty programs by linking to existing coalition programs, as Vintage Inns did with Aerogold. The costs inherent in fast tracking such a loyalty program are primarily borne in the communication to that set group such as direct mail, e-mail and traditional advertising.

The cost factor to facilitate this is normally based upon a commission of points issued to the loyalty partner – in the Aerogold/Advantex model: a percentage fee is based upon the value of the points issued. This is the norm, however some programs “force” the client to purchase points at a set fee. These points also have a “shelf-life” and have to be distributed or “lost”, as “unused inventory”. My experience is that these companies are realizing that they have to change their model or lose loyalty-market share.

Loyalty programs that provide easy access to rewards, after a few purchases, for instance, are more apt to succeed. Recognizing this, many companies with proprietary loyalty programs are also moving towards “affiliated” or coalition programs. Programs such as American Express, Aeroplan and others, afford the cardholder the opportunity to collect points at a variety of retail establishments, while ensuring that the member continues to remain loyal to one program.

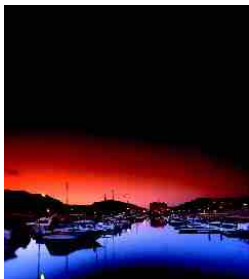
Improvements in customer loyalty can, in turn, translate into bottom line enhancement for a company. Making loyalty programs a strategic component to a business plan, is the first step. Staying the course and reaping the rewards of the program is the second.

All the data was sourced through CIBC/Aerogold VISA transactions via Moneris Solutions. The company affiliated with data/fund transfer to CIBC/Aerogold.

Allen Gelberg is director of operations with Upper Canada Hotels, in Niagara-on-the-Lake. He can be reached at a.gelberg@RediscoverNiagara.com.



JOIN US IN KELOWNA, BRITISH COLUMBIA, CANADA



Kelowna at night

Kelowna is the largest city in British Columbia's Okanagan Valley with all the amenities of a major centre: fine dining, unique shops and a vibrant cultural life - yet orchards and vineyards thrive within a 10-minute drive of the downtown core. Located in the center of the Okanagan Valley, Kelowna is the perfect "base camp" for all of your Okanagan explorations.

Do you know that Kelowna offers?

Heritage Experience:

Discover the legend of "N'ha-a-itk", better known as Ogopogo, (lake monster) which is recorded sightings date back to 1850 at Okanagan Lake. The 'creature' is reported to be large and dark with a long neck and humped back, attracting many creative people like filmmakers, producers, writers, sculptors, artists and artisans, singers and musicians to this area to work and live. The Native population of the area accepted its existence as a fact of life, occasionally canoeing to a cave believed to be its home and leaving food offerings for safe passage.

Wine Tasting and Touring:

Since the 1930's the Okanagan wine industry has evolved to what today are the winning awards on the world wine stage. Over a dozen wineries are located in Kelowna, and some 65 throughout the Okanagan Valley, offering wine tasting as well facility tours to teach visitors the art of winemaking. The Spring, Summer, and Fall Wine Festivals offer hundreds of activities focused on wine making, tasting, and touring.

Arts and Entertainment:

Those who enjoy the arts will feel at home in this vibrant District that covers a six-block area in the city's centre. A concentration of galleries, museums, theatres, and artist studios co-exist with an eclectic mix of dining opportunities. Kelowna is home to several local theatre groups, a symphony orchestra, a museum and numerous art galleries.

Learn more about the agricultural heritage with fascinating exhibits in the Wine Museum, BC Orchard Industry Museum, and the Kelowna

Museum. The Canadian Heritage Cultural Spaces Program recently named our Cultural District as the best in Canada!

Orchards, Gardens and Golfing:

There's a lot growing on in Kelowna: fruit, flowers, festivals and fun are abundant in the Valley. Spectacular vistas await those ready to explore; visit one of several championship golf courses in the area for a premium golf experiences and you'll find yourself meandering through an orchard, over desert terrain and rolling hills, or past expansive lakes and canyons.

Shopping and Spas

Finish off your busy day by exploring a wide range of shops or self-indulge at a salon or day spa. Take a walk through the heart of the City, stroll down Harvey Avenue (Highway 97) and visit Spall Road for home decors ideas and Pandosy Street for the latest home furnishing ideas. Just a block off Pandosy, Tutt Street Square also offers an array of choices from trendy teapots to the perfect painting.

Kelowna's selection of day spas is the perfect way to pamper yourself and ease those tired muscles at the end of a day full of activities. In Kelowna, your mind, body and spirit are well nurtured.

Attractions and Activities:

Just minutes from everywhere, Okanagan Lake, 110 km (68 mile) long lake, is the focal point of life in Kelowna. Both Kelowna's residents and tourists find the lake to offer wonderful opportunities for boating, swimming or fishing. The nearby mountains attract hikers, skiers and outdoor enthusiasts of all descriptions. The lake and surrounding mountains provide the scenic backdrop for a wide range of family attractions and outdoor activities including golf, downhill skiing and snowboarding, cross-country skiing, snowmobiling, water-skiing, waterslides, cycling, hiking, camping, horseback riding, and fishing. Within a one hour drive, you will arrive to three major ski hills: Big White, Silver Star and Apex.

TTRA CANADA CONFERENCE 2005:

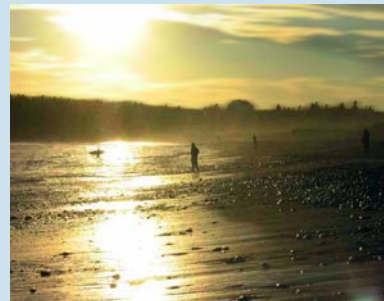
Did You Also Know That?

- Kelowna is well-known for its hot summers and temperate winters.
- Kelowna receives over 2,000 hours of sunshine annually and just over 11 inches of rain.
- Okanagan Lake Bridge (built in 1958) is the longest floating bridge in North America (7/8 mile).

Getting There...

Although relatively undiscovered, Kelowna is easily accessible and ready to host visitors from throughout the world. It is located approximately 400 kms (240 miles) from Vancouver and 600 kms (360 miles) from Calgary on Highway 97. 150 km (90 miles) north of the United States border, Kelowna is easily accessible by air, by bus and car via Highway 1, 3 or 5. Kelowna International Airport is the 11th busiest airport in Canada with direct departures to Seattle, Vancouver, Calgary, Edmonton and Toronto.

Enjoy your 2005 TTRA Conference in the year round warm and beautiful Kelowna. Experience the undiscovered Kelowna! Like people say, 'Your imagination is the only boundaries'.



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