

# EXECUTIVE SUMMARY

## INTRODUCTION

The operational review consisted of a joint public/private sector Review Team, chaired by External Affairs and International Trade Canada (EAITC), which interviewed industry representatives throughout Canada and the United States as well as tourism managers and staff at selected posts in the U.S. Discussions with provincial tourism bureaux in the U.S. as well as competitive national and state bureaux formed the balance of the review.

The findings of the Review Team have been grouped into six areas of concern, as follows:

1. Strategic Direction
2. Priority Activities
3. Level of Service Delivery
4. Events
5. Post Operations
6. The Competition

The purpose of the operational review was to identify the tourism support services required by the private sector and relate these needs to the services currently being provided through the posts. The result is a series of positive recommendations to redirect post efforts to concentrate on those activities of highest concern to the tourism industry. The focus of the operational review was limited strictly to programs and services. Post staff cooperated fully with the Review Team and share many of the concerns identified in the report. Already, several elements of the recommended change of direction have been initiated by posts. As a result, this project will also assist in giving momentum to these initiatives through increased support and commitment.

## 1. STRATEGIC DIRECTION

The strategic direction provided by Tourism Canada for post tourism programs is not clearly evident in the day-to-day activities of the posts nor is it understood by the industry. This, in combination with the attempt of post staff to respond to all industry requests, results in post activities that are driven more by events and reactions rather than by strategic design. At the same time, inadequate communications between the posts and the indus-

try, and vice-versa, has led to a high level of frustration in both parties as unrealistic expectations are not met.

To alleviate this situation, the Review Team *recommends* that post tourism staff develop more structured and continuous communications with the industry so that strategic direction and commercial intelligence can be provided in a timely manner. The Review Team also notes the responsibility of the industry to provide the posts with accurate and timely information on new product/package developments in Canada.

A means of easing both of these concerns would be for the posts to utilize industry associations as a communications conduit. In turn, these associations could undertake to disseminate this information to their members and associates, particularly in such important areas as market intelligence and promotional activity plans.

## 2. PRIORITY ACTIVITIES

The private sector in Canada and the United States is absolutely clear about its expectations from the posts, though they differed between the two countries. The Canadian-based industry wants the focus upon the development of highly qualified sales leads and timely and high quality commercial intelligence above all other services. The U.S.-based industry demands travel industry education and support for new product development. Both industry groups questioned the efficacy of the traditional programs that form the mainstay of so much of the posts' activities.

To bridge this gap between industry expectations and post activities, the Review Team recommends that the role of the posts be redefined so that it is consistent with the four priority functions identified by the industry.

## 3. LEVEL OF SERVICE DELIVERY

Virtually all industry representatives indicated that they had noticed a significant decline in the level of tourism support services being provided since tourism programs were integrated into External Affairs and International Trade Canada (EAITC) missions in the U.S. Cited as reasons for this decline were industry perceptions that staff were less motivated, the team spirit had disappeared, the rotational system was moving people too