

accommodation (hotel/motel) other than a friend's or relative's house.

Canada was seen as a suitable place to visit relatives, but lacking exciting events and attractions, with little of the city night-life usually found in a pure holiday destination. Thus, for British first-time visitors, Canada was not associated with activities such as dining out, a visit to the theatre and shopping. On the other hand, those who had visited Canada were much more likely to associate Canada with these activities.

The British consumer has, however, weak images of Canada in the following areas: reliability of weather; interesting local people; good beaches; historical and cultural interest; "different" culture; and exotic and exciting atmosphere. It was found that Canada's "Great Outdoors" image (winter sports, fishing, camping, etc.) appeals to only a minority of long-haul holiday makers in this market.

The youth/student market, approximately 30 per cent of the U.K. travel market, consists of school groups, individually booked adventure or camping groups, and youths travelling independently, using bus or rail passes and staying in hostels or residences.

The development of the youth market is hindered by the high cost of transportation to Canada and by rigid requirements for fixed dates of return on discount-fare plans. Youths tend to travel without itineraries; so fixed return dates do not appeal to them. Therefore, it is difficult to develop tour packages for this market segment.

London is a major centre of international commerce, and there are hundreds of head offices of large firms and international associations in and around the capital. London's importance, combined with the VFR (Visiting Friends and Relatives) factor, and Canada's abundance of resorts and meetings and conference facilities, means that the United Kingdom's meetings and incentive travel market potential is also very high.

With supplemental and scheduled carriers, Canada is easily accessible by air from the U.K. The practice of co-mingling (mixing of outgoing and returning passengers) and "open jaw" charters (entering at one point and exiting from another) when combined with promotional fares, seat sales and "skybus" fares all work to Canada's advantage vis-à-vis the U.K. market.

Competition and Competitor Activity

For Canada, vis-à-vis overseas tourism markets, the United States is, and will be in the foreseeable future, the biggest competitive challenge. Contributing factors are:

- constant and ever present awareness world-wide of the United States because of its capacity to generate news;
- the image of being a rich and diverse country, and the subsequent lure of economic opportunities for people overseas;

- significantly cheaper airfares and a vastly greater number of direct international flights to/from most overseas markets;
- greater number of major attractions (e.g. Disneyland and Universal Studio);
- world's number one financial/business and cultural centre in New York City, and the regional ones in Miami, Houston and Los Angeles;
- year-round mild climate in Florida, Arizona and California with their well developed tourism attractions;
- significantly greater financial resources, spent by major cities, states and the federal government, not to mention by major airlines, tour operators and other trade components on tourism promotion overseas.

The United States Travel and Tourism Administration (USTTA) recently reopened its public enquiries service in London, thus removing a noticeable advantage Canada's national tourism office enjoyed in reputation of assistance to the consumer. The State of Florida's Division of Tourism has also opened a London office to work more closely with the British Travel trade.

There are 158 countries represented in the United Kingdom, 88 national tourist offices, and more international carriers represented than anywhere else in Europe. In 1983, all those national tourist offices from other countries spent £13.9 million on tourism advertising. Of the main advertisers in the U.K. after the English Tourist Board, Spain was first, Greece second, Morocco third, South Africa fourth and Canada fifth.