

More must also be done to attract travellers in the shoulder seasons, spring and autumn. Canada's positive outdoor attributes emphasize the predominant "woodland" image. This in turn tends to hamper the development of a more diversified image appealing to a broader market segment. Another obstacle is the lack of awareness of Canada's culture, its interesting history and its exciting cities. It should also be noted that Germany has one of the most stringent consumer protection laws in the world. Sellers must therefore be extremely accurate in describing their offer and ensure that the services provided fulfill the promises advertised.

Objectives for next five years

Canada's appeal rests on outstanding scenery, national parks, forests and wildlife; exciting sports; friendliness; safety; attractive citylife; numerous cultural possibilities; high quality accommodation and restaurants at competitive prices.

For a more intense exploitation of the long-travel market, five product segments have been identified:

- 1) soft outdoor adventure
- 2) winter experiences
- 3) cities
- 4) touring
- 5) hard outdoor adventure.

Marketing activities will focus primarily on the pleasure segment, but will also target the incentive market, a fast growing and lucrative segment. There will be stepped-up marketing activities aimed directly at business travellers and consumers, such as increased presence at consumer fairs, consumer advertising, targeted mailings and outcalls, and promotional evenings for consumers.

Activities

Rendez-vous Canada

May, every year in Canada; International travel marketplace;
Suppliers of travel products/services from across Canada meet with foreign buyers on a scheduled basis. Buyers can assess the variety of the Canadian offer while raising the industry's awareness of foreign market opportunities. Please contact provincial/territorial tourism authorities about participation.

Canada's West Marketplace

November/ December, every year in Alberta and B.C.;
International travel marketplace. Same format as Rendez-vous Canada; smaller, more focused. Please contact provincial tourism authorities about participation.

Ontario/Québec Reverse Marketplace

September/October, every year in Ontario and Québec
International travel marketplace. Same

format as Rendez-vous Canada; smaller, more focused. Please contact provincial tourism authorities about participation.

ITB

March 1998, Berlin
International Tourism Exchange; one of the world's premier travel fairs.
Please contact the Canadian Tourism Commission about participation.

Roadshow Seminars

Very popular travelling seminars throughout Germany; in conjunction with major tour operators. Participation open to Canadian provinces, territories and airlines.

Consumer Tourism Fairs

International Travel Market Cologne, November/December
Leipzig Travel Market, December
CMT Stuttgart, January; Travel Hamburg, February
CBR Munich, February
Participation by Canadian partners is welcome but limited to provincial/territorial tourism associations and airlines in order to avoid conflict of interest with German tour wholesalers also participating in the Canada stand.

Consumer promotions

Various formats, changing every year.

Transportation

Automotive

Overview

Germany's auto industry is one of the world's largest (est. 1996: 4.5 million vehicles) with a highly developed infrastructure, and a well-educated productive labour force. It may also be the most expensive (auto worker wages average \$54/hour) as production costs are 40% lower in North America and Japan and 20% lower in the rest of the EU. Nevertheless, domestic investment in the sector reached \$11.5 billion in 1995 indicating that infrastructure and labour training were still a competitive advantage. Outward investment has been growing even more rapidly and now every third German automobile is produced abroad. Parts out-sourcing plays a major role, and, due to cost advantages, the German market is attractive for Canadian parts manufacturers.

Major companies

The big producers in Germany are Mercedes Benz, Porsche, BMW, Volkswagen, Audi, Opel and Ford. While most have set up production and assembly facilities abroad, worldwide administration and procurement have remained centralized in Germany.