

From a Market Probe Survey in Australia, socio-economic characteristics of the Canadian market were determined and found to concentrate in

- the younger age group, 25-39 years;
- upper-income households;
- high school or better in education; and
- "A" social class.

By far the main appeal of Canada as a holiday destination was outstanding scenery (62 per cent), possibly because Australia is an arid land without high mountains. Other features which appealed were outdoor activities, scenic beauty close to cities, interesting local people, lots of historical and cultural interest, and a quiet, unspoilt atmosphere.

Thirty-two per cent of Australian visitors to Canada visited British Columbia, closely followed by Ontario (28 per cent). Alberta holds third place (20.2 per cent), followed by Quebec (10.8 per cent). With respect to pleasure trips, 33.3 per cent went to British Columbia, followed by 25.4 per cent to Alberta, 23.1 per cent to Ontario, and 10.2 per cent to Quebec. More than four-fifths (80.7 per cent) of Australian visitors to Canada arrived via the United States — a percentage that has increased steadily from a low in 1975 of 67.1 per cent.

Recent Canadian Marketing Activity

Because of Canada's geographic location, Tourism Canada's marketing activities traditionally have been focused on the travel trade in partnership with the airlines and the major tour operators. Eighty per cent of Tourism Canada's human resources have been directed to informing, educating, motivating and supporting travel influencers, while 20 per cent of the activities have been directed to the consumer. On the other hand, budgets have been about evenly split between travel trade and consumer activities, including

- (i) Advertising program for both the consumer and travel trades;
- (ii) Visit Canada Program (Media) — approximately 10 travel journalists from Australia are invited to Canada annually;
- (iii) Agents' Educational Tours — approximately 40 travel influencers from Australia are invited to Canada each year;
- (iv) Trade Promotions — approximately 10 major seminars called "Canada Corroboree" are conducted in the larger cities in association with CP Air, Qantas, Air Canada and selected tour wholesalers;
- (v) Consumer Promotions — nil; and
- (vi) Trade Information Program — 20,000 Package Tour Books produced locally each year.

Market Considerations

Australian tour operators and wholesalers plan and market their products in a variety of ways. For the most part, tour planning takes place in April and May, but may start as early as January. Pricing and itineraries are generally finalized by August and Sep-

tember, and products are launched over October and November. Many of the brochures cover an 18-month span.

Almost all tour operators and wholesalers have a retail operation, some of which are very wide reaching. Australian banks have an extensive network of travel agencies. There are also a number of franchise operations. For example, a smaller agent can become an American Express or Thomas Cook outlet as a franchise. Some tour wholesalers offer overriding commissions to travel chains such as bank travel agents if those agencies agree to sell their product in preference to others on the market. They become the agency's "preferred product" for a specified destination, and other wholesalers' tour brochures are generally not put on the stands or sold unless a client specifically requests it. Tour wholesalers also offer an incentive override commission for sales of more than a specified target.

Some of the larger tour operators, which have retail travel chains, and the large bank travel chains advertise frequently on television, radio and in the print media. Many international and domestic airlines operate large tour booking offices and advertise their services and destinations heavily in all media. Consumer brochures are generally the most widely used sales tool. Large consumer travel shows are gaining popularity and attract wide audiences.

Bookings generally commence in February and increase throughout March and April. The trend has been for very late booking, possibly because of uncertainties in the economic climate.

Most sales are handled through a network of travel agencies. From surveys made of travel agents' attitudes towards Canada, retail knowledge of Canada as a destination is often insufficient. This may be partly owing to Australia's relative isolation from Canada.

Travel agents would not normally influence anyone to visit Canada but act only when a client expresses an interest to visit. In other words, agents are generally order-takers. Tour operators should aim their promotions towards influencing the consumer and continue to increase agents' awareness of Canada through seminars, press releases, newsletters and so on.

The Competition

Carriers with direct service to Canada are Canadian Pacific, Cathay Pacific and Qantas. Indirect service is provided by Air New Zealand, Continental Pacific, Pan American and U.T.A. There are 26 online carriers and representation by 53 offline carriers. Twenty-nine countries maintain national tourist offices in Australia; in addition, 25 countries and U.S. states are represented in Australia.