

REPORT

INTRODUCTION

The mandate of the operational review was to examine the role and activities of the tourism market development program as delivered through the External Affairs and International Trade Canada (EAITC) posts within the United States in relation to the needs and expectations of the Canadian tourism industry. The goal was to ensure that post tourism staff and resources were focused on achieving the priority objectives as defined by Tourism Canada in consultation with the Canadian private sector.

The operational review consisted of a Review Team representing the Canadian tourism industry as well as Tourism Canada and EAITC. In the course of the review, which took place between April and June, 1989, the Task Force interviewed:

- ▶ 45 selected tourism industry representatives within Canada in Vancouver, Toronto, Montreal and Halifax;
- ▶ 42 selected tourism industry representatives (Canadian and American) in the United States actively involved in selling Canada as a travel destination;
- ▶ 18 post staff including tourism managers and staff, senior trade officials and Consuls General at the posts in Chicago, Detroit, Los Angeles, Atlanta and New York;
- ▶ Officials representing competitive tourism bureaux – the British Travel Authority, the Australian Tourism Commission and the New York State Department of Economic Development;
- ▶ Officials representing the tourism bureaux of Alberta, Ontario and Quebec operating in the U.S. marketplace.

The findings of the Review Team have been grouped into the following categories:

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

The section on Conclusions and Recommendations also includes the response of Tourism Canada and EAITC to those recommendations.

STRATEGIC DIRECTION

While Tourism Canada has developed a medium-term strategy and provides annual operational direction to help define the role and mandate of the post tourism staff, the strategy is not clearly evident in terms of the day-to-day operations of the posts. The existence of the strategy rarely arose in conversations with post officials, other than through prompting, even though the annual workplans were supposedly based upon that strategy.

▶▶ *The Industry Does Not Know a Strategy Exists*

Further, it was clear that the industry, both U.S. and Canadian-based, were generally unaware of the existence of either the medium term or annual strategy or how it might help to define industry relationships with the posts. For the most part, the industry was also ignorant of the existence or contents of the annual workplans based upon that strategy. This lack of awareness was amply demonstrated by industry concerns with the nature of the annual planning cycle and their collective and individual involvement in it.

Awareness of the mandate and role of the posts, in tourism terms, varied depending upon the type, size and nature of U.S. involvement of the industry representatives consulted. However, it was clear that the level of industry awareness within Canada was substantially lower than the level of awareness of industry representatives within the United States. Even with the latter, though, understanding of what the posts could do for them – or with them in cooperative ventures – was generally restricted to the tried-and-true. Communication flow between post and client users was not actively encouraging the development of new promotional initiatives.