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# Tourism Market Profiles - US and Overseas

## Travel Trade & Consumer Shows

External Affairs and  
International Trade Canada



Canada





**PART I**

**TOURISM MARKET PROFILES - US AND OVERSEAS**

This document is for the benefit of the Canadian Travel Industry. It is intended to assist the Canadian tourism industry seize potential opportunities afforded by the United States and the primary Overseas markets.

The brochure is designed as a reference to provide an overview of the various territories including market segment profiles and potential for Canadian tourism product development.

**PART II**

**TRAVEL TRADE & CONSUMERS SHOWS**

This United States, travel trade and consumers events list is for the benefit of the Canadian travel industry. It is intended to serve as an indication of the type of travel trade and consumers events scheduled to take place in the United States in 1991.

This list is by no means exhaustive nor complete. It has been compiled by geographical area of responsibility of the Canadian Consulates in the United States.

If you would like to receive more information on the event(s) listed in the following pages, we encourage you to either communicate directly with the organizers identified in the listing or with the nearest Canadian Consulate.

In addition, the Canadian Consulate also organize specially targeted promotional activities with the contribution of selected industry partners.

For further information we encourage you to communicate directly with the Canadian Embassy or Consulate identified in this document or contact:

External Affairs and International Trade (Canada)  
US Trade and Tourism Division (UTO)  
Lester B. Pearson Building  
125 Sussex Drive  
Ottawa, Ontario  
K1A 0G2  
Telephone: (613) 993-7344  
Fax: (613) 990-9119

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The Atlanta Post territory covers an area of 346,214 square miles, an area slightly smaller than the Province of British Columbia yet containing approximately 10% of the total U.S. population. While the Southwest is substantially more rural, agriculture being the U.S. as a whole (59% of the population is urban versus 79% for overall U.S.), its economic diversity more than compensates for this seemingly "rural" status.





**CANADIAN CONSULATE GENERAL/TOURISM**

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**PROFILE**

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**Tourism Personnel:**

Doug I. Ditto, Deputy Consul General

Saverio (Sam) Paglioni, Commercial Officer (Tourism),  
Meetings, Conventions and Incentive Travel markets.

Barbara Bach, Commercial Officer (Tourism), Tour  
Operators, Travel Agents, Specialty Markets, and Media.

**Territory:** Served by the Atlanta Consulate General are:

Alabama	North Carolina
Florida	South Carolina
Georgia	Tennessee
Mississippi	Puerto Rico
	U.S. Virgin Islands

**Population:** 1990 figures estimate SEUS population at 44 million people.

The Atlanta Post territory covers an area of 346,214 square miles, an area slightly smaller than the Province of British Columbia yet containing approximately 16% of the total U.S. population. While the Southeast is substantially more rural/agrarian than the U.S. as a whole (59% of the population is urban versus 79% for overall U.S.), its economic diversity more than compensates for this seemingly "rural" statistic.



The states in the post territory have a number of major cities including Miami, Atlanta, and Charlotte; numerous centers of excellence (academic, R & D); high-tech and manufacturing industries; and a large service base. For these reasons, as well as a moderate climate, the South during the 1980s has been one of only two regions of the nation to gain more residents than it lost through internal U.S. migration, slightly edging out the Western U.S. in net increase.

According to a recent survey by Fortune magazine, Georgia was one of the biggest net gainers of Fortune 500 companies to move into the state, capturing 8 new corporate headquarters for the reporting year of 1988-1989. All together the SEUS is home for 32 of the largest industrial Fortune 500 corporations (see Appendix A for complete breakdown).

Significant developments in the territory include the selection of Atlanta, Georgia as the site of the 1996 Summer Olympics, which has and will continue to increase media and business attention on the Southeastern United States.

**Stats at a Glance:**

- . 1988-1989 average Unemployment rate for the territory: 5.7%
- . 1988-1989 Average Population Growth rate for the territory: 12%
- . 1988-1989 Per Capita Income by State:

Alabama	\$12,604	North Carolina	\$14,128
Florida	\$16,546	South Carolina	\$12,764
Georgia	\$14,980	Tennessee	\$13,659
Mississippi	\$10,992	Puerto Rico	\$ 4,301
		U.S. Virgin Islands	\$ 7,465

**Assistance available from the post:**

- Market intelligence
- Joint promotions/seminars
- Win Tourism Database
- Assistance in coordinating activities in territory
- Sales leads/referrals
- Counselling to travel industry



**Assistance not available from the post:**

Co-op advertising support  
Response to critically short lead times

**CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY:**

**TRAVEL TRADE/SPECIALTY MARKETS**

**Touring/City:**

The absence of direct air routes to Canada from much of the post territory, especially Atlanta, is the largest constraint to tapping market potential for Canada as a destination. Scheduled service is good from Florida, which represents the greatest leisure travel market potential for Canada. American Airlines recently inaugurated nonstop service from Nashville to Toronto, which means that the territory can expect more business from Tennessee.

North Carolina represents the second greatest area of potential leisure travel to Canada. In the motorcoach segment, there are more tour operators active to Canada from NC than from any other southeastern state. Traditional destinations are eastern Canada and the Canadian Rockies.

Lack of consumer advertising in the Southeast is a concern in the touring/city market, and all segments for that matter.

**Outdoor/Adventure:**

There is excellent potential for market development in this particular segment in the Southeast. The most popular outdoor trips are drive trips, fly-drive, and fly-in. Most persons travel as individuals or in private 3-5 member groups; organized club trips usually include ten or more passengers; trip duration is a minimum of 1 week, maximum of 3. Typically the smaller groups book through travel agents. The larger organizations book on their own. Trips are planned 6 months out.

Sixty-five outdoor clubs are located throughout the Southeast, especially in the larger urban areas of Georgia, Tennessee, and North Carolina. The Atlanta CONGEN has identified approximately 30 outdoor shows, among them a dozen or so fishing shows as venues to tap into this segment.



### Ski Market:

Potential and demand for Canada ski product in the Southeast falls into three areas: 1) organized public ski clubs offering membership to the general consumer, 2) private or business-related ski clubs, and 3) the general public.

The organized public ski groups is the largest area with 80% of the membership belonging to the 16,000 member, 30-club Crescent Ski Council (in NC, SC, TN, VA, KY) 8,000 member Florida Ski Council, and 5,000 member Atlanta Ski Club.

Eastern Canada trips are more popular than western Canada (with possible exception of Banff); competition from Colorado is fierce and air connections and knowledge or exposure to Canada's various ski destinations need improvement.

Private businesses with employee ski clubs is a vast untapped potential; the same is true of the general public. Conservative estimates number potential skiers at 200,000. Eastern Airlines offers packages to Mt. Tremblant and Villa Bellevue from Atlanta, and Air Canada, Delta, and Canadian Holidays offer Eastern Canada successfully in Florida due to excellent air connections.

Some 50-70 ski clubs are on record with the Atlanta CONGEN and another dozen ski tour operators/wholesalers. Numerous venues exist in the Southeast for the promotion of ski product, including the Crescent Ski Council's annual convention, the Florida Suncoast Series, and Jerry Simon's SKIGROUP.

### Tour Operators and Travel Agents:

Between 1987 and 1990, the number of tour operators in the southeastern US increased 28.7%, from 233 to approximately 300. The number of tour operators actively selling Canada product increased from 98 to approximately 120, an increase of roughly 22.44%.

Currently the WIN database at the Atlanta Consulate stores information on 58 NTA tour operators, 37 of which are active to Canada; and 90 ABA tour operators, 58 of which are active to Canada. A survey is now in progress to complete the database.

There has been an increase in the number of retail travel agencies in the southeastern US. Between 1987 and 1990, the number increased from 3,525 to 4,204 or roughly 19%.



The 31-million member American Automobile Club with 154 affiliates recently moved its worldwide headquarters to Florida, a new market development that took place in November, 1989. Throughout the southeastern US, there are approximately 73 auto clubs.

#### Future Plans/Promotional Opportunities:

The Atlanta Canadian Consulate General has identified market research as an area of primary focus. To that end, a survey is underway to complete our inventory of tour operators and build a first-generation databank of information.

Current marketing and promotional activities include a \$50,000 joint marketing agreement with Air Canada in the Florida market to tap into the Hispanic market and custom promotions to the group tour market, coordinated with select marketing partners, (i.e. travel agent firms and reverse marketplaces such as Rendezvous Canada, etc). We also support provincial and municipal initiatives.

The Atlanta CONGEN will not hold a Spring product launch series this year. We will participate in the Don Holland Tradeshow in Atlanta February 18, 1991, and coordinate select promotions with the private sector. Seminars on the GST are also planned for 1991.

#### MEETINGS, CONVENTION, AND INCENTIVE TRAVEL

In this territory there are an estimated 1,200 companies with designated meeting planners, 400 national and international association headquarters, 100 incentive houses and numerous Fortune 500 headquartered companies such as Coca-Cola, Georgia Pacific, Equifax and Turner Broadcasting, to name just a few.

#### The Corporate and Association Markets:

In our MC&IT Data Bank we have profiles on 1200 organizations, corporate and associations that plan some type of meetings. Through constant updating and the use of questionnaires, we have identified over 500 companies who have an interest in meeting in Canada, with 50 other companies indicating a definite interest in meeting in Canada (they have selected a city and plan to visit the city in the next three years).



In addition to the strong corporate market which prevails in the Southeast, the association market is amply represented, especially in the Research Triangle Park area located in Raleigh/Durham, North Carolina. This research complex is home to over two-dozen national and international associations, all capable of utilizing Canada for their meeting programs.

#### The Incentive Travel Company Market:

The Southeast territory has a number of well known incentive travel companies which are consistent producers of programs to Canada. Included in this list are: The Chateau Group (based in Montreal), Osborne Incentive Travel, Carlson Marketing/E.F. MacDonald, Timco Travel, Maritz and Motivational Technologies. To maintain additional contact with this group, the MC&IT officer is the current Regional Chairperson of Georgia for the Society of Incentive Travel Executives (SITE).

#### MEDIA

In addition to editors of major media and daily newspapers, there are many specialty journalists in the Southeast, the all-important Cable News Network in Atlanta, and a major cable TV producer, GEOVISION, in Miami with 25 million viewers, 409 locations, and 36 Hispanic markets.

We are building a first-generation databank of media profiles (approximately 200).

#### Daily Newspapers:

There are 24 newspapers with a circulation in excess of 100 million. The Atlanta post has had contact with 93 travel/feature editors. Major dailies include:

	<u>Circulation</u>
The Birmingham News, (AL)	181,000
The Advertiser, (AL)	52,000
The Florida Times Union, (FL)	160,000
The Miami Herald, (FL)	517,000
The Orlando Sentinel, (FL)	275,000

The St. Petersburg Times, (FL)	307,944
The Evening Independence (FL)	
The Tallahassee Democrat, (FL)	55,000
The Tampa Tribune, (FL)	275,000
The Atlanta Journal Constitution (GA)	255,636
(Sundays)	500,000
The Clarion Ledger,(MS)	73,362
The Charlotte Observer, (NC)	205,782
The News and Observer, (NC)	163,100
Winston-Salem Journal,(NC)	95,000
The State, (SC)	130,000
News and Courier, (SC)	75,000
The Commercial Appeal, (TN)	223,950
The Tennessean, (TN)	127,015
The News-Sentinel, (TN)	102,000
The Star, (Puerto Rico)	

Other Media:

There are 2,004 AM and FM radio stations in the territory, and 248 television stations.

Freelancers:

The Atlanta CONGEN has had contact with 195 outdoor writers/photographers, and 32 general interest freelancers and photographers,

How We Assist:

We provide editorial research assistance, photographs, and slides; and arrange media visits to Canada with complimentary airfare. We also participate in cooperative programs with provinces and municipalities.



**CANADIAN CONSULATE GENERAL/TOURISM**

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Telex: 94-0625 (DOMCAN BSN)  
Fax: (617) 262-3415

Tourism Personnel

Jacques Duval, Consul & Trade Commissioner/Tourism, Program Manager; also responsible for Special Projects, Field Intelligence.

Ralph Johansen, Commercial Officer/Tourism. Responsibilities: Meetings, Conventions and Incentive Travel; Outdoor/Adventure market (hunting/fishing/ski), Specialized Media (MC&IT/Outdoor/Adventure).

Janet Aiton, Commercial Officer/Tourism. Responsibilities: Travel trade - tour operators, travel agents, airlines, auto clubs; Arts & Culture Market; General Media.

Linda Schmidtke, Secretary to Program Manager.

Wendy Diltz, Secretary to Commercial Officers/Tourism.

Territory Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.

Population 9.5 Million.

Historically, there are strong culture and family ties between the five New England states and Eastern Canada, particularly Quebec and the Atlantic Province. It is estimated that 25% of Vermont and New Hampshire residents have a Franco heritage. There is also a strong level of awareness of Eastern Canada and an active generation of trade between the two regions. Massachusetts alone represents 60% of the New England population (excluding Connecticut), with close to 40% living in the metropolitan Boston area. Boston has experienced rapid growth in the 1980's and Massachusetts in particular fared well with low unemployment and the highest growth rate in the US. That phenomenal growth, though exhilarating, was clearly unsustainable. Readjustments are underway and the region is in for some slow years. Other major



markets are Providence, RI, Worcester/Springfield and New Bedford, MA, and Portland, ME. Even with a 7% unemployment rate as reported in November 1990 and an economic slowdown plaguing the region, Massachusetts remains economically important.

The New England states have successfully made the transition from manufacturing to a service-based economy. An early industrialization provided a pool of skilled labour and entrepreneurs. Universities have been a source of technologies, professional and technical manpower and entrepreneurs. The willingness to take a risk and availability of venture capital has facilitated start-ups. In recent years, the region has constantly scored above average on all economic indicators.

New England conservatism makes for a value-conscious and cautious buyer. The New England visitor of one or more nights stays three to four nights average and spends approximately \$255.00. The majority (63%) are for a pleasure/recreation holiday and most visitors are repeat (close to 90%); mode of transportation is 71% auto; 14% plane; and 8% bus. Half travel during July, August and September, with April, May and June a second choice. New England residents have an affection for active and passive outdoor/nature activities but touring remains their prime travel experience. The New England market is well positioned and mature. There is potential for future growth in the outdoors/adventure and meetings and convention markets as well as short stay travel. The over-55 age group is increasing and offers opportunities.

#### Assistance Available from Post

Market information; sales leads/referrals; joint promotions; counselling to the travel industry; assistance in coordinating activities in territory; MC&IT data base; use of office facilities.

#### Provincial Tourism Bureaux In-Territory

Nova Scotia Information Office  
136 Commercial Street  
Portland, Main 04101  
(207) 772-6131

Exchange Place  
53 State Street  
Boston, MA 02109  
(617) 723-3366

Ontario Ministry of Tourism & Recreation  
4360 Prudential Center  
Boston, MA 02199  
(617) 266-7172  
Quebec Tourism



## MARKET SITUATION/POTENTIAL

### Meetings, Conventions and Incentive Travel

The New England territory is predominately a corporate market characterized by smaller size meetings but with a higher frequency of meetings. High technology, defense, banking and insurance are key sectors of the New England economy. There are twenty Fortune 500 companies based in our territory. Associations located in the territory tend to be regional (few national) or state within New England.

Our general assessment of this market is that the territory represents untapped potential for Canada, the extent of which remains to be determined.

### Future Plans/Promotional Activities

- MC&IT site inspection program
- Update MC&IT data base
- MC&IT presentation 1 for Quebec, 1 for Atlantic Canada.

### Outdoor/Adventure

New England represents excellent potential for outdoor products, both consumptive (fishing & hunting) and non-consumptive (adventure). New England fishermen tend to be interested in a cold water fishery (trout & salmon), but there has been recent dramatic growth in bass fishing (warm water). Trends indicate a change from a backyard fishery to travelling further to pursue their interests. Fly fishing remains popular with an increasing emphasis on catch and release.

Three major Outdoor shows, Worcester, Springfield and Boston reach a potential audience of over 400,000. The New England Outdoor Writers Association (list available) provides an excellent vehicle for exposure in this market. Adventure travel is a growth market. Trends towards conform, comprehensive trips and educational/cultural trips in the adventure market offer opportunities.

### Future Plans/Promotional Activities

- Increase data base - clubs & affinity groups
- Visit Canada (Outdoor Media) program
- Outdoor shows
- Adventure travel initiatives.



### Touring/City/Culture

The impact of the New England travel trade (carriers, operators, wholesalers, retail agents) on traffic flows to Canada represents roughly 20% to 25% of the total number of visitors from this region and appears to have reached a plateau. Reports from hotels in Canada and motorcoach operators in this market for 1990, indicate an increase in cancellations and a drop in load factors. Efforts are being concentrated in selling new Canadian products and destinations through the travel trade.

There are approximately 1,200 travel agencies in our five-state territory and 55 Wholesalers/Tour Operators with Canadian programs. There are 36 American Automobile Association offices, five of which have motorcoach tour divisions. The seven airlines servicing Canadian from our territory are Air Canada, Air Alliance, Air Atlantic, Air Nova, Delta Air Lines, First Air, Northwest Airlinck and US Air. The two marine carriers are Marine Atlantic and Prince of Fundy Cruises.

### Future Plans/Promotional Activities

- Travel trade presentations and seminars with several US and Canadian tour operators and airlines
- Visit Canada (Trade) Program
- Product testing tours with local U.S./Canadian operators
- New product development activities
- Support the attendance of local tour operators to:
  - Rendez-Vous Canada
  - Bienvenue Quebec
- Canada Media Day promotion in partnership with Canadian provincial and city media/PR representatives
- Visit Canada (Media) Program.

## MEDIA

### General Media

An increase in contacts and a strengthening of our work with the media in New England, both print and electronic, continues. Since over 70% of visitors to Canada from this territory travel by automobile and by-pass the travel trade, and since we are no longer in the direct consumer business, we must at least maintain our share of the "rubber traffic" by increasing the visibility of Canadian products and destinations through enhanced PR activities such as the Visit Canada (Media) Program, Media Day, interviews, talks shows, etc.

For many years this office has worked closely with free lance writers, authors and photojournalists, along with several major publications and electronic media outlets. Resulting editorial and publicity coverage for Canada has been excellent.

### How We Assist

Assistance to the media is offered in the following manner:

- 1) Visits Canada (Media) Program:
  - financial assistance to visit a Canadian destination
  - itinerary planning
  - arranging editorial contacts/appointments
  - coordination with provincial and city media officers.
- 2) Research assistance;
- 3) Providing photographs/releases from our library;
- 4) Joint promotions with provincial partners;
- 5) Selection and coordination of a New England media group to attend a major media marketplace organized by the Canadian Consulate in New York (March 1991).



Several newspapers have weekly travel sections and often feature Canadian articles.  
The major newspapers and their circulations:

The Boston Globe	811,149/Sunday
The Boston Herald	308,000/Sunday
The Providence Journal	264,000/Sunday
The Worcester Telegram	119,423/Sunday
The Springfield Union	163,000/Sunday
The Burlington Free Press	61,000/Sunday
The Portland Press	153,000/Sunday
The Bangor News	95,000/Sunday

In addition, there are:

78 daily newspapers; 417 weekly newspapers; 5 metro papers; 311 AM/FM radio stations; 32 commercial television stations; 41 cable television stations; 126 regional publications.

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Tourism Personnel

Lynn Niederlander, Commercial Officer - Tourism, Responsibilities: Travel Trade, Media, Meetings, Conventions and Incentive Travel, Auto Clubs, Ski Clubs.

Lisa Tarajos, Tourism Assistant.

Population 4 million.

Territory Western, Central and Upstate New York (Countries of Chautauqua, Cattaraugus, Erie, Niagara, Orleans, Genesee, Wyoming, Allegany, Livingston, Monroe, Wayne, Yates, Ontario, Steuben, Chemung, Schuyler, Tioga, Seneca, Cayuga, Broome, Cortland, Onondaga, Oswego, Jefferson, St. Lawrence, Lewis, Oneida, Madison, Chenango, Delaware, Otsego, Herkimer, Montgomery, Fulton, Hamilton, Essex, Franklin, Clinton and Thompson)

Manufacturing, agriculture and high technology make up the economic base for the territory. High tech giants IBM, GE, Kodak, Xerox, Bausch & Lomb and Corning all have roots and major facilities in our territory. Manufacturing employs 20% of all workers, versus 12% downstate and 15% in the nation as a whole. The work force is highly skilled. Due to high tax structure in the state, growth is predicted to be lower than elsewhere in the nation, but the diverse economic base makes for a stable economy.

The largest city, Buffalo, has bounced back from its early 80's recession, when a lay-off occurred of over 20,000 steel workers. Since then, there has been an 18% increase in new jobs, mostly in the service industry, and there has been a boom in residential development. Canadian firms have taken advantage of Buffalo's relatively low labour



and real estate costs. Since 1987, 74 Canadian companies, with Toronto based "Variety Corp." recently added to the list, have expanded or set up operation in Buffalo, and the number of single family homes built in the country has increased by 35%. Buffalo was recently named host for the 1993 World University Games.

The wealthiest Upstate city, Rochester, relies on manufacturing to keep going. In the past ten years, its population has increased 2.2%. It is cited as having more job opportunities than any other Upstate city, being the home of Kodak and Bausch & Lomb.

Syracuse, largely because of its position in the center of the state, is cited as having the potential for the greatest growth in all of Upstate New York. Presently the 5th largest city in the state, it is relying on high tech start-ups to provide future jobs. One of the largest shopping malls in the state, The Carousel Mall, recently opened here.

Binghamton, a city said to have more of an affinity with Central Pennsylvania because of its location, has recently faced lay-offs in its primary defense and computer industries. It also is now "shifting its gears" to the service sector.

#### Assistance Available from Post

Market intelligence	Sales lead/referrals
Joint promotions/seminars	Counselling to travel industry
Select profiles from WIN	Assistance in coordinating
Tourism database	activities in territory

#### CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY

##### Touring/City

Potential for one to five day trips is high, although operators report success with new longer tours, such as eleven day Quebec/Labrador or ten day Nova Scotia. Canadian Rockies sell well. Several operators have increased or varied Canadian tours. Competition is forcing differentiation, and some companies now work together and feed into each others' tours. Two of the largest operators dropped their retail program and work with preformed groups. Week-end trips continue their popularity. Unfortunately, there is only one direct flight a day from Buffalo to Montreal, but several from Syracuse. Toronto is perceived of as a vibrant city with much to offer, but is thought to be expensive. The "phantom" seems to be the largest draw presently.

### Outdoor/Adventure

There are three major sport shows in the territory. Canadian exhibitors report good response from each. Post has been successful in working with members of the New York State Outdoor Writers' Association in promoting Quebec fishing and hunting. "Canada East" will exhibit at a Buffalo sport's show for the first time this year. Ski clubs have potential for year-round adventure travel other than skiing.

### Meetings, Convention and Incentive Travel

There are five Fortune 500 companies in this territory, but there is good potential for small corporate meetings close to the border or incentive getaways due to "middle management glut", where incentive awards take the place of promotions in motivating middle management or sales force.

In our MC&IT database, we currently have 267 profiles of companies with potential to meet in Canada. As for incentive travel, there are five incentive firms in our territory. The Consulate has plans to host a marketplace, "Canada Showcase", for meeting and convention planners in Buffalo on February 12, 1991, timed to facilitate travel for exhibitors in the marketplace sponsored by Quebec in Toronto on February 14.

### TRAVEL TRADE

There are 567 retail agencies in the territory, 16 auto clubs with 12 branches and 47 wholesalers/tour operators. Auto Travel Departments of the auto clubs have been very helpful in supplying numbers of "triptiks" done to Canada.

### Future Plans/Promotional Opportunities

The Consulate will sponsor Canada Marketplaces for the travel trade in the Spring and Fall as follows:

- March 4, - Watertown
- March 5 - Syracuse
- March 6 - Rochester
- March 7 - Buffalo



The Watertown Daily Times will publicize the "Canada Day" on March 4 to readers in four counties. There will be a consumer snow for 3 hours, with a hospitality suite for the travel trade. As for the fall, we plan to have two marketplaces in Syracuse and Rochester, and we will organize a Canada section at the "Travel Marketplace" in Buffalo in September.

The Consulate contracts the support services of "The Meeting Company" to assist in the show organization.

### SKIING

There are 59 ski clubs in the territory, most of which we have on profile sheets. The annual Syracuse Ski Show is one of the largest and longest running in the East, and there are plans for a Buffalo Ski Show this fall. This area represents a good ski market for Canada, due to proximity to Quebec and to the Toronto airport for Western skiing departures. We have been successful in promoting both through media and ski club fairs and promotions.

The Consulate works closely with Isabel Gil, Fair Gordon and Heather Fernandez in Toronto to promote Quebec skiing by sending ski club trip chairmen to "Rendez-Vous Ski Quebec" annually, by co-hosting an annual "Quebec Ski Night" in Rochester and by hosting ski fairs.

### MEDIA

#### Daily Newspapers

We work closely with the travel sections of the following three daily newspapers:

	<u>Circulation</u>
The Buffalo News	315,000
The Rochester Democrat and Chronicle/Times Union	674,000
Syracuse Herald Journal	231,750

All three are associated with American Publishers Representatives in Toronto for advertising.

### Other Media

The publications of the Buffalo and Rochester auto clubs have wide circulations among membership. It has proven extremely beneficial to include publication writers on fairs.

A little known fact is that one can obtain advertising very cost-effectively by running ads in the auto club publications, particularly "The Motorist" of the Buffalo area and "The Traveller" of Rochester.

The local business publications, "Buffalo Business First" and the Rochester and Syracuse Business Journals, provide good opportunities for MC&IT advertising. "Buffalo Business First" runs an annual fall feature on meetings and convention sites.

The weekly papers in each of the three major cities offer circulations in affluent suburbs, and have cheaper advertising rates than the daily papers.

We have good relationships with several productive free-lance writers, many of whom have produced and published syndicated articles in the past. Some key free-lancers will be invited to "Dateline Canada" sponsored by the Canadian Consulate General in New York City in March.

Our office has an updated all inclusive print and electronic media list for the territory, including talk show hosts, promotion contacts and assignment editors. In addition, all media has been entered in the WIN Tourism Database.

### Magazines

"The Buffalo Spree" magazine has an upscale readership and a circulation of 20,000. Their travel writer has produced excellent Canadian stories.

"Travelhost" magazines are published in Syracuse, Rochester and Buffalo and are distributed in hotel rooms. They offer potential for Canadian editorial and advertising, as does the "Welcome to Western New York" publication, which is similarly distributed.



Canadian Consulate General/Tourism  
310 South Michigan Avenue  
Chicago, Illinois 60604

MARKET PROFILE

PHONE: (312) 427-1031  
TELEX: 025-4171  
FAX: (312) 922-0637

TOURISM STAFF:

C. DURBAN MORROW Consul & Trade Commissioner/Tourism

**RESPONSIBILITIES:** - Program Manager

- Oversees program activities in outdoor adventure, automobile clubs, special interest groups, retail travel agents, wholesale tour operators, transportation companies, meetings, conventions and incentive travel, and is the official representative for the tourism program.

Adrienne C. Delaquila Commercial Officer/Tourism

**RESPONSIBILITIES:** - Oversees program activities for media, outdoor adventure, incentive travel, automobile clubs, special interest groups; retail agents/outdoor adventure/AAA travel agencies; tour operators/wholesalers-outdoor adventure; visual-aids lending program; newsletter.

Ross Ament - Commercial Officer/Tourism

**RESPONSIBILITIES:** - Oversees program activities for meetings and conventions.

Larry Kogut - Commercial Officer/Tourism

**RESPONSIBILITIES:** - Oversees program activities for travel trade-retail travel agents, wholesalers, and tour operators.

Territory:

The following states are served by the Consulate in Chicago:

- Illinois, Wisconsin, Missouri
- Quad-city area of Iowa
- Kansas City area of Kansas
- Counties of Indiana, Jasper, Lake, La Porte, Newton and Porter in the state of Indiana

The Chicago consulate territory holds a wealth of opportunity for marketing potential. The economic trend for the 1990's in terms of the midwest is favorable and is expected to be amongst the fastest growing economies, as it refers to real income. Employment is expected to experience the most activity it has felt in the last eleven years. Concerning population, six of the twelve mid-western states have been growing steadily since 1980. On the business scene, thirty-three percent of the largest U.S. industrial corporations are located in the Midwest with the Chicago consular territory having 71 fortune 500 companies under their program jurisdiction.

Territory Information:

Illinois:

Trade:	Is one of the leading states in export trade.
Square Mileage:	56,400
Population:	11,418,461
City Information:	State Capital: Springfield

Business Center:

Chicago is the center of immense business activity in printing and publishing, steel works and rolling mill products, and is the greatest railway center in the world.



## Illinois - Lifestyle Demographics

### Chicago

#### Vital Statistics:

Population:	6,203,100
Households:	2,303,200
Median Age:	32.9
Total EB1 :	\$87,161,650,000
Total Retail Sales:	\$42,741,467,000
Buying Power Index:	2.7058

### The Top Ten Lifestyles

#### Chicago

Bicycling Frequently  
Bowling Environmental  
Golf  
Stock/Bond Investments  
Career-Oriented Activities  
Gourmet Cooking/Fine Foods  
Wines Hunting/Shooting  
Racquetball  
Home Video Games  
Science Fiction

### Sports & Leisure Activities

Bicycling Frequently  
Golf  
Bowling  
Racquetball  
Physical Fitness/Exercise  
Watching Sports on TV  
Tennis Frequently  
Running/Jogging  
Walking For Health

### Outdoor Activities

#### Chicago

Wildlife  
Motorcycles  
Fishing Frequently  
Camping/Hiking  
RV's - 4-WD

### Outdoor Activities

Motorcycles  
Wildlife  
Camping/Hiking  
Fishing Frequently  
RV's - 4-WD  
Hunting/Shooting

Snow Skiing Frequently  
Boating/Sailing

Chicago-Cook County

The Top Ten Lifestyles

Bicycling Frequently  
Bowling Environment  
Attend Cultural/Art Events  
Gourmet Cooking/Fine Foods  
Foreign Travel  
Wine  
Golf  
Career-Oriented Activities  
Fashion Clothing  
Racquetball

Sports/Leisure Activities

Bicycling Frequently  
Bowling  
Golf  
Racquetball  
Physical Fitness/Exercise  
Tennis Frequently  
Watching Sports on TV  
Running/Jogging  
Walking For Health  
Snow Skiing Frequently  
Boating/Sailing

Chicago-Cook County

Outdoor Activities

Wildlife  
Fishing Frequently  
Camping/Hiking  
Motorcycles  
RV's - 4-WD  
Hunting/Shooting



Chicago-DuPage County

The Top Ten Lifestyles

Golf  
Racquetball  
Stock/Bond Investments  
Career-Oriented Activities  
Personal-Home Computers  
Wines RV's - 4-WD  
Tennis Frequently  
Real Estate Investments  
Bowling

Sports/Leisure Activities

Golf Racquetball  
Tennis Frequently  
Bicycling Frequently  
Bowling  
Snow Skiing Frequently  
Physical Fitness/Exercise  
Running/Jogging  
Watching Sports on TV  
Boating/Sailing  
Walking For Health

Chicago-Kane County

The Top Ten Lifestyles

Bicycling Frequently  
Golf  
Bowling Environmental  
Racquetball  
Home Furnishing/Decorating  
Motorcycles  
Home Workshop

Chicago-DuPage County

Outdoor Activities

Wildlife  
Environmental  
Camping/Hiking  
Motorcycles  
Fishing Frequently  
Hunting/Shooting

Chicago-Kane County

Outdoor Activities

Motorcycles  
Wildlife  
Camping/Hiking  
Fishing Frequently  
RV's - 4-WD  
Hunting/Shooting

Electronics  
Crafts  
Collectibles/Collections

Sport/Leisure Activities

Bicycling Frequently  
Golf  
Bowling  
Racquetball  
Watching Sports on TV  
Physical Fitness/Exercise  
Snow Skiing Frequently  
Boating/Sailing  
Tennis Frequently  
Walking For Health  
Running/Jogging

Chicago-Lake County

The Top Ten Lifestyles

Golf  
Stock/Bond Investments  
Tennis Frequently  
Real Estates Investments  
Snow Skiing Frequently  
Racquetball  
Wines Hunting/Shooting  
Foreign Travel  
Personal/Home Computers  
Fine Art/Antiques

Chicago-Lake County

Outdoor Activities

Wildlife  
Environmental  
Motorcycles  
Camping/Hiking  
Fishing Frequently  
RV's - 4-WD



Sports/Leisure Activities

- Golf
- Tennis Frequently
- Snow Skiing Frequently
- Racquetball
- Bicycling Frequently
- Boating/Sailing
- Bowling
- Physical Fitness/Exercise
- Running/Jogging
- Watching Sports on TV
- Walking for Health

Chicago-McHenry County

The Top Ten Lifestyles

- Golf
- Bowling Wildlife
- Boating/Sailing
- Home Workshop
- Snow Skiing Frequently
- Home Furnishing/Decorating
- Motorcycles
- Real Estate Investments
- Wildlife/Environmental
- Household Pets

Sports/Leisure Activities

- Golf
- Bowling
- Boating/Sailing
- Snow Skiing Frequently
- Bicycling Frequently
- Racquetball
- Watching Sports on TV
- Physical Fitness/Exercise

Chicago-McHenry County

Outdoor Activities

Motorcycles

- Environmental
- Camping/Hiking
- Fishing Frequently
- RV's - 4-WD
- Hunting/Shooting

Waling For Health  
Tennis Frequently  
Running/Jogging

Chicago-Will County

The Top Ten Lifestyles

Bowling Motorcycles  
Home Video Games  
Golf  
Automotive Work  
Motorcycles  
VCR Recording/Viewing  
Racquetball  
Crafts  
Home Workshop  
Stock/Bond Investments

Sports/Leisure Activities

Bowling  
Golf  
Racquetball  
Bicycling Frequently  
Watching Sports on TV  
Physical Fitness/Exercise  
Boating/Sailing  
Snow Skiing Frequently  
Walking For Health  
Running/Jogging  
Tennis Frequently

Chicago-Will County

Outdoor Activities

Fishing Frequently  
RV's - 4-WD  
Camping/Hiking  
Wildlife  
Environmental  
Hunting/Shooting



**Indiana - Lifestyle Demographics**

**Chicago-Lake County/IN**

**The Top Ten Lifestyles**

Bowling Fishing Frequently  
Home Video Games  
Golf  
Automotive Work  
Crossword Puzzles  
Watching Sports on TV  
Crafts Hunting/Shooting  
Fashion Clothing  
Bicycling Frequently  
Collectibles/Collections

**Sports/Leisure Activities**

Bowling  
Golf  
Watching Sports on TV  
Bicycling Frequently  
Physical Fitness/Exercise  
Racquetball  
Walking For Health  
Running/Jogging  
Boating/Sailing  
Tennis Frequently  
Snow Skiing Frequently

**Chicago-Porter County/IN**

**The Top Ten Lifestyles**

Bowling Motorcycles  
Motorcycles  
Home Video Games  
Golf

**Chicago-Lake County/IN**

**Outdoor Activities**

Motorcycles  
Wildlife  
Environmental  
Camping/Hiking  
RV's - 4-WD

**Chicago-Porter County/IN**

**Outdoor Activities**

Camping/Hiking  
Fishing Frequently  
Wildlife

Automotive Work  
Shopping by Catalog  
Bicycling Frequently  
Crafts  
Racquetball  
Collectibles/Collections

Environmental  
RV's - 4-WD  
Hunting/Shooting

Sports/Leisure Activities

Bowling  
Golf  
Bicycling Frequently  
Racquetball  
Watching Sports on TV  
Physical Fitness/Exercise  
Boating/Sailing  
Running/Jogging  
Snow Skiing Frequently  
Walking For Health  
Tennis Frequently

Wisconsin:

Trade: The state is a tourist mecca for fishing and boating; waterfowl, deer and bear are hunted in the fall.

Square Mileage: 54,705

Population: 4,705,335

City Information: State Capital: Madison

Business Center:

Milwaukee/Green Bay manufacturing is strongest in the heavy industries, although the state is best known for its manufacture of beer, paper and farm tractors.



**Wisconsin - Lifestyle Demographics**

**Green Bay**

**The Top Ten Lifestyles**

- Hunting/Shooting
- Bowling Fishing Frequently
- Fishing Frequently
- Golf
- Motorcycles
- Snow Skiing Frequently
- Boating/Sailing
- Crafts
- Home Workshop
- Bicycling Frequently

**Sports/Leisure Activities**

- Bowling
- Golf
- Snow Skiing Frequently
- Boating/Sailing
- Bicycling Frequently
- Walking For Health
- Watching Sports of TV
- Physical Fitness/Exercise
- Running/Jogging
- Tennis Frequently
- Racquetball

**Outdoor Activities**

- Hunting/Shooting
- Motorcycles
- Wildlife
- Environmental
- Camping/Hiking
- RV's - 4-WD

Trade: Travel Center  
Square Mileage: 69,226  
Population: 444,714  
City Information:

1,401,300  
337,500  
\$18,616,445,000  
\$27,080  
\$2,883,013,000  
\$ 2877

Population  
Households  
Median Age  
Total FFB  
Median Household  
Total Retail Sales  
Buying Power

Madison

The Top Ten Lifestyles

Snow Skiing Frequently  
Hunting/Shooting  
Bowling Environmental  
Wildlife/Environmental  
Bicycling Frequently  
Motorcycles  
Golf  
Camping/Hiking  
Career-Oriented Activities  
Boating/Sailing

Sports/Leisure Activities

Snow Skiing Frequently  
Bowling  
Bicycling Frequently  
Golf  
Boating/Sailing  
Physical Fitness/Exercise  
Watching Sports on TV  
Tennis Frequently  
Racquetball

Outdoor Activities

Hunting/Shooting  
Wildlife  
  
Motorcycles  
Camping/Hiking  
Fishing Frequently  
RV's - 4-WD

Milwaukee

Vital Statistics

Population:	1,401,300
Households:	537,500
Median Age:	32.7
Total EBI:	\$18,616,645,000
Median Household:	\$27,680
Total Retail Sales:	\$9,863,013,000
Buying Power:	\$ .5977



Milwaukee

The Top Ten Lifestyles

Bowling  
Golf  
Snow Skiing Frequently  
Bicycling Frequently  
Stock/Bond Investments  
Motorcycles  
Hunting/Shooting  
Collectibles/Collections  
Entering Sweepstakes  
Wildlife/Environmental

Outdoor Activities

Motorcycles  
Hunting/Shooting  
Wildlife  
Environmental  
Fishing Frequently  
Camping/Hiking  
RV's - 4-WD

Sports/Leisure Activities

Bowling  
Golf  
Snow Skiing Frequently  
Bicycling Frequently  
Physical Fitness/Exercise  
Watching Sports on TV  
Boating/Sailing  
Walking For Health  
Tennis Frequently  
Racquetball  
Running/Jogging

Missouri:

Trade: Travel Center  
Square Mileage: 69,226  
Population: 4,917,444  
City Information: State Capital: Jefferson City

**Business Center:**

St. Louis is a center for travel and for extensive freight traffic carried on by air, rail and river. The city is the gateway for north and south tourist traffic, as well as freight traffic.

**Kansas City-Kansas:**

**Trade:** One of the most important livestock markets in the United States.  
**Population:** 161,087

**St. Louis**

**Vital Statistics:**

**Population:** 2,482,100  
**Households:** 913,100  
**Median Age:** 33.1  
**Total EBI:** \$32,128,071,000  
**Median Household EBI:** \$27,397  
**Total Retail Sales:** \$17,027,328,000  
**Buying Power Index:** \$1.0363

**The Top Ten Lifestyles**

Bowling  
Stock/Bond Investments  
Fishing Frequently  
Grandchildren  
Racquetball  
Crafts  
Hunting/Shooting  
Home Video Games  
Collectibles/Collections  
Home Workshop

**Outdoor Activities**

Fishing Frequently  
Hunting/Shooting  
Wildlife  
Environmental  
Camping/Hiking  
Motorcycles  
RV's - 4-WD



Sports/Leisure Activities

Bowling  
Racquetball  
Golf  
Physical Fitness/Exercise  
Watching Sports on TV  
Walking For Health  
Tennis Frequently  
Bicycling Frequently  
Running/Jogging  
Snow Skiing Frequently

Missouri - Lifestyle Demographics

Kansas City

Vital Statistics:

Population: 1,567,600  
Households: 598,500  
Median Age: 32.8  
Total EBI: \$21,106,331,000  
Median Household EBI: \$27,571  
Total Retail Sales: \$11,420,454,000  
Buying Power Index: .6798

The Top Ten Lifestyles

Fishing Frequently  
Hunting/Shooting  
Career-Oriented Activities  
Fine Art/Antiques  
Household Pets  
Sewing  
Crafts  
Wildlife/Environmental  
Bible/Devotional Reading  
Collectibles/Collections

Outdoor Activities

Fishing Frequently  
Hunting/Shooting  
Wildlife  
Environmental  
Motorcycles  
Camping/Hiking  
RV's - 4-WD

Sports/Leisure Activities

- Racquetball
- Golf
- Watching Sports on TV
- Walking For Health
- Bowling
- Physical Fitness/Exercise
- Running/Jogging
- Boating/Sailing
- Tennis Frequently
- Snow Skiing Frequently
- Bicycling Frequently

Product Development Potential in Territory

This territory is the second largest in terms of national and international associations. Of the four major cities the numbers are as follows:

Chicago Metropolitan	1,200
St. Louis	100
Kansas City	120
Milwaukee	140

Due to bylaws or other regulations not all associations are able to conduct an event in Canada. The Consulate continues to qualify these clients as to their potential for Canada.

There are a majority of medical associations located in this territory including American Medical Association, American Dental Association, and American Hospital Association.

This territory contains the headquarters for several multi-association management firms. These companies provide a myriad of services for all types of associations including meeting planning and site selection. One of the largest is Smith Bucklin and Associates based in Chicago. This company, with excess of 600 employees, represents over 155 associations.



A sample of other multi-association management firms are:

Bostrum Corporation  
Breeden Company  
PM Haeger and Associates  
Humes and Associates

Other examples of the size and types of associations in this territory are:

American Bar Association  
American Architectural Mfrs. Association  
American Soybean Association  
Million Dollar Round Table  
North American Baptists

### Chicago Metropolitan Market

Chicago is the second largest association market with 18% market share of all national associations. There are over 900 national associations and over 300 state and local groups based in Chicago. The Chicago Society of Association Executives is the oldest society dating back to 1916 (4 years older than ASAE). Chicago has the most medical associations of any other city.

Fifty percent of the associations are in the downtown region. Of the other fifty percent, the O'Hare region ranks first, Oakbrook second, and Schaumburg third.

Indicative of the size of six major associations is the number of employees:

YMCA of USA	7,900
American Medical Association	1,100
American Hospital Association	900
American Bar Association	700
Realtors Association	450
Rotary International	400

### Corporate Meetings

The Chicago Consular territory contains 33% of the largest U.S. industrial corporations. Seventy-one of the Fortune 500 companies are located in this territory. Chicago ranks second in the December 10, 1990 edition of the "Forbes Magazine 400" list of the largest corporations. Twenty-five of the top companies are located in Chicago. Of the states, Illinois ranks fourth with 29 corporations. Some of the major corporations are:

Allstate Insurance Company	Quaker Oats
Amoco Oil Company	State Farm Insurance
CNA Insurance Company	Stone Container Corporation
Anheuser-Busch	
Federated Foods	
McDonald's Corporation	
McDonnell Douglas Corporation	
Motorola	
Navistar	
Ralston-Purina	

### Incentive Travel

The incentive travel industry in the Chicago post territory is one of the largest in the United States. In St. Louis, Missouri, is located the largest company, Maritz Travel Company. Maritz, Incorporated is the parent company to five operating companies:

- Maritz Motivation
- Maritz Travel
- Maritz Communications
- Maritz Marketing Research
- Maritz Limited

Over one half of America's billion-dollar companies are their clients. Maritz employs approximately 5,000 people. Also in St. Louis are Intrav and Meridien.

Incentive travel industry in the Chicago area consists of several medium to small sized companies that are aggressively challenging the established larger leaders. The Canadian Consulate in Chicago currently has 83 such companies with 199 contacts.



An example of these companies in Chicago that the Consulate has aggressively contacted are:

Motivation Excellence  
AHI Incentives  
S & H Motivation

The majority of incentive travel companies has conducted some type of event in Canada. They are very interested in Canada as a destination, but must be constantly contacted using current materials and audio visuals. The personal contact is of utmost importance.

#### Travel Trade

There are approximately 2,526 retail travel agents in the territory with a breakdown of 1,444 in Illinois, 496 in Missouri, 511 in Wisconsin, and 75 in the 6 counties in Indiana.

There are 123 Wholesalers/Tour Operators in the territory with the highest concentration of 61 in the state of Illinois followed by 34 in Wisconsin, 23 in Missouri, 3 in Kansas, and 1 each in Indiana and Iowa. The combined scheduled tour offerings to Canada by these operators number 500 plus with 40% having multiple departures. Of these tour offerings 55% are of 5 day duration or less and 35% are of 10 days to 2 weeks duration. These figures do not represent any special departures the operator may have for groups, or tailored groups on special requests.

It is estimated that the Chicago area's top 25 retail travel agents have gross sales of \$1,349,022,000.00 in 1990.

Estimates of Wholesalers/Tour Operators gross revenues for 1990 on scheduled tour programs to Canada is over \$71,500,000.00.

The city of Chicago is home for 21 foreign, 3 state, and 2 Provincial (Ontario and Quebec) tourism offices vying for the Midwest's tourist dollars.

### Future Plans

Major travel trade shows to be attended by trade officer for 1991/92 year number 16 in major market areas of Chicago, Milwaukee, St. Louis and Kansas City.

In addition to the above, joint promotions will be held with Air Canada and Canadian Airlines in other than areas covered by major market travel shows. Additionally we will support, where funds exist and organizations warrant, and cooperate with tour operator's in promotions to their major contacts and group influencers for travel with Canada as a destination. We will continue to support VCP (Travel Trade) working with the cities of Toronto and Montreal plus other Provinces to get operators and influencers to visit Canada for their new tour programs.

### Corporate Travel

Corporate Travel Agent files are being set-up to establish major agencies with Corporate travel to Canada with visits to these accounts offering officer's expertise on various Canadian destinations.

### Ski

The Chicago marketplace hosts the Chicago Metropolitan Ski Council (CMSC) an association made up to 100 ski clubs representing over 45,000 skiers. CMSC strives to keep clubs current on all activities pertaining to ski areas, equipment, procedures, liabilities, innovations and general interest.

### Special Interest Groups

Affinity groups and their similarities in travel needs mean big business. These groups can range from special interest travel to sales meetings, training sessions and incentive or executive functions. This marketplace offers a diversity of interests and financial status and offers the Canadian supplier a catalogue of interests to target.

The Tourism program in Chicago has segmented the marketplace in terms of special interest groups, and is adding new categories daily. Some of the segments on hand include, ski clubs, cycle clubs, pony clubs, photography clubs, fishing clubs and birding organizations.



### Automobile Clubs

AAA operates more than 850 fully licensed Travel Agencies throughout the US and Canada. The club offers many services to their 30 million members including a 24-hour Toll-Free Travel Hotline, airline reservations, tours and cruises, group travel, an escorted and independent tours, as well as general travel information.

There are three Automobile clubs located in our territory (Illinois, Wisconsin, and Missouri). Illinois has 24 travel agencies under their jurisdiction; Wisconsin has 20; and Missouri has 16. Each club produces a magazine for their membership, which includes travel segments.

Concerning the automobile member, the AAA operates a personalized service which included TRIPTIK planning. AAA Tourbooks are available which provide valuable information on points of interest; also available, to AAA members who enjoy outdoor vacations, are the AAA Campbooks.

We work very closely with the automobile clubs and their agencies providing information on the Canadian destination and product, and educating their personnel on the opportunities available in Canada.

Destinations are encouraged to participate in educational seminars.

### Media

There are a total of 1,290 newspapers located in our territory, as well as 1,177 periodicals (a total of 2,467 publications). Electronic media/radio is represented by 313 stations in Illinois, 12 stations in five-county areas in Indiana, 295 stations in Wisconsin, and 251 stations in Missouri (891 radio stations). In terms of television, there are 31 stations operating in Illinois, 25 in Missouri, and 27 Wisconsin (83 stations).

A major network located in territory is Sportsvision out of Oak Park, Illinois. Sportsvision is the all-sports regional cable television network serving the tri-state area of Illinois, Indiana and Iowa, featuring exclusive professional sports from Chicago. This network serves approximately 60 cable systems, and caters to an audience of some 1 million.



### Outdoor/Adventure Travel

The adventure travel segment is one of the fastest growing areas of the travel industry today. One of the major reasons is that travel agencies are recognizing that their clients don't have to be masochists in order to enjoy a wide range of outdoor experiences including the rigorous-such as wilderness rafting, to the soft-such as nature walks.

The adventure market can no longer be stereotyped as belonging to the hunters, fishermen or mountainmen. Adventure travel is catching on with everyone, old and young, well-to-do and middle-of-the-road--there's something for everyone.

The true adventure traveller is experienced and sophisticated and knows the experience they are seeking. Adventure activities can include soft activities such as walking tours and cycling, or something a bit more challenging such as whitewater rafting or heli-skiing. For the most part, however, adventure travel is any travel, individual or group, that is predominantly an outdoor activity; is physically challenging; has some elements of risk; usually requires some instruction; offers a change to traditional vacation mentality-eat, drink, and relax; provides an educational experience; puts the traveller in touch with the environment; and allows for personal growth.

There are seven adventure travel motivators: escape, prestige, regression, kinship enhancement, social interaction, novelty and education. It is probable that one motivator or perhaps a combination of motivators play a role in the travel purchase decisions of adventure travellers.

Research has shown that ego enhancement is a major motivator when exotic destinations are selected. Adventure seekers are more highly motivated by novelty and prestige needs than the average traveller.

Outdoor adventure travel targets all age groups. However, the 60-plus age group is America's fastest growing travel group--accounting for more than 40 million potential travellers. This group has the disposable income and time to take extended, multi-purpose trips. According to the USTTA, of the 6.5 million Americans who travelled to Europe in 1988, some 1.9 million were 55 or older.

By the year 2000, the age 50 and up boomers will represent 12 million people, the largest single group in the country. Due to the number of boomers in the workforce, many will face "mid-career compaction". There will be many people competing for the same jobs. This group will swap old jobs for new opportunities, have sequential careers and cyclical work periods.



Boomers have different values and family structures. Characteristics include dual-income couples with fewer children and convergent male-female roles. In terms of spending money, this group thinks that everything is great, as long as, they have credit cards and are not over the limit. Boomers will have plenty of money. Three-quarters of the people in their parent's and grandparent's generation own their own homes. In this regard, there is a tremendous amount of wealth which will be passed along to this generation. Boomers will look for experience rather than things and will make ideal candidates for soft outdoor adventure activities.

The travel industry that deals with adventure travel believes that the major growth area for adventure travel is the 45+ age group. The tourism industry in general is targeting the older traveller because statistics are showing that the North American population is rapidly greying.

Chicago has long been known as a untapped market for the outdoor enthusiast, with particular emphasis on the old traditional fishing, hunting, and downhill ski markets. These old and well established hard adventure segments have been well worked by all the Canadian provinces and territories since the mid-sixties, when the Chicago branch of the Canadian Government Travel Bureau opened its' office; and earlier with Air Canada's "FIN, FUR, and FEATHER" program, which was highly successful at the time. CP HOTELS, Canadian National Railways, and Canadian Pacific Railways, as well as, Canadian Pacific Airlines, (now CAIL) have worked this market diligently for 50 years.

Canada's appeal in this market has been based on the outdoor fishing, hunting and skiing markets with a particular concentration on Ontario, N.W. Ontario, Manitoba, Saskatchewan, the Northwest Territories, the Canadian Rockies, Quebec, and Atlantic Canada, in that order.

To this day, Chicago is still host to the largest Outdoor/Hunting/Fishing and Vacation Show in North America, which is held out at O'Hare. Chicago also hosts the Jerry Simon Ski and Golf Shows, and the newest success story-the International Travel Adventure Show.

The All Canada Show organizers, who are headquartered in Green Bay, Wisconsin, hold seven shows in the Chicago consular territory.

The midwest outdoor adventure enthusiast is very knowledgeable about Canadian products and has regularly taken groups to Labrador, Nova Scotia, Manitoba, Saskatchewan, the Northwest Territories and British Columbia for quality fishing, hunting and skiing.



What has not been tapped in this consular territory is the tremendous market for high revenue-soft adventure programs.

The trend for the 1990's is definitely dedicated towards the "silent sports". The lifestyle, outdoor and sports/leisure activities define a shift of interest from the old traditional hunting, fishing and skiing segments to the wilderness/environment, physical fitness and related soft adventure segments. This shift in interest should be noted by our Canadian industry partners; and, further programs should be developed for these emerging activities.

High revenue generating activities can be obtained in several segments. Golf in particular, can bring in significant revenues; it is a sport practiced by the affluent American, as well as the middle-of-the-road; new and exciting golf destinations are always sought after; and there is currently a shortage of golf courses in the United States.

Eco-tourism is another area on the rise. Increasingly, segments of the outdoor recreation and environmental movements are coming together at the consumer level to give nature visits a purpose. Environmental mishaps (such as the Exxon/Valdez incident in Alaska) have contributed to the rising interest of the American consumer regarding environmental preservation.

The Chicago consular territory clearly has high revenue potential for many outdoor activities. Canada can attract the upper income end of the market seeking up-scale experiences. This marketplace offers a diversity of interests and financial status and offers the Canadian industry a myriad of market opportunities. The changing demographics and lifestyles which are re-defining the tourism marketplace throughout the world are clearly present in the Chicago consular territory and represent an enormous potential for future business to Canada.

#### Assistance Offered Through Post

The Canadian Consulate General - Tourism Program in Chicago is here to service both supply and demand. In terms of supply, we provide current market intelligence on specific sectors; share supplier's product information with designated travel influencers; assist suppliers with their marketing efforts within the Chicago consular territory; provide on-site expertise; and connect the supply sector to the demand in this marketplace (PRODUCT-MARKET MATCHING). We are here to share intelligence -- product information to the marketplace, and market information to the supplier. In this regard, we maintain a comprehensive database, as well as destination portfolios.



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Tourism Personnel/Territory

**Cleveland:**

Mr. Lawrence D. Lederman, Head of Consular Post & Senior Trade Commissioner  
Mr. Michael G. Virr, Consul & Trade Commissioner  
Mr. John K. Latkovich, Tourism Officer

**Territory: Northern Ohio**

**Pittsburgh:**

Mr. Ron McLeod, Consul & Trade Commissioner  
Ms. Viola Boehm, Tourism Officer

**Territory: Western Pennsylvania and West Virginia**

**Cincinnati:**

Mr. Jacques Desjardins, Consul & Trade Commissioner  
Mr. Richard Dunn, Tourism Officer

**Territory: Southern Ohio and Kentucky**

## 1. Post Overview

The Post territory covered by the Canadian Consulate - Cleveland, encompasses the states of Ohio, Kentucky, West Virginia and the 11 counties of Western Pennsylvania, and has a total population of over 20 million. In 1989, this territory enjoyed a bilateral trading relation in goods of \$19,8 billion (CDN), making it the third largest trading region for Canada in the United States. Also, 55 of "Fortune's top 500" companies are headquartered in this region.

For tourism, 67% of the population base (13 million) fall into the "Target Market Audience" category as defined by Tourism Canada - annual Household Income of + \$25,000./age 25 and up. On an annual basis, approximately 17% of the total U.S. inventory of package tours to Canada, originate from the Cleveland Post territory. According to a 1986 American Bus Association study, Pennsylvania ranked number 1 and Ohio ranked number 3, out of 40 states that list motorcoach companies with permits to enter Canada. These two states alone comprise 22% of the 40-state total. Mediamark Research indicates that automobile travel from the territory accounts for 78% of the travel from this territory representing approximately \$133 million (USD) in tourism revenues to Canada.

In response to Canada's National Trade Strategy, the External Affairs and International Trade Canada established Canadian Government Trade Offices in Pittsburgh and in Cincinnati, with Trade and Tourism Officers in 1987. The objective of these "Satellite" offices, which report through the Canadian Consulate in Cleveland, is to more evenly decentralize Canadian trade and tourism promotion efforts in these important commercial centers with assistance provided in all the major tourism sectors.

## 2. Post Services

Each office is prepared to service and/or assist the Canadian Tourism plant by a) Providing information on qualified sales leads by sector, b) Participate with the Tourism plant in joint Federal/Provincial/City/Private sector programs whenever possible, c) Provide information on related competitive strategies and programs, d) Provide analysis of marketable products and recommend proper distribution channels. The post programs as listed by sector give an indication of the marketing expertise available. However, services available and tourism promotions are not solely limited to these programs.



### 3. Sub-territory profiles

The Cleveland, Pittsburgh and Cincinnati offices have their own mini-profiles outlining information regarding a) Market Trends, b) Competition, and c) Quebec tourism products as they pertain to their sub-territory.

### 4. In-territory Marketing Opportunities

Accompanying this profile is a listing of available marketing opportunities i.e. Travel Trade Shows, Consumer Shows, Sport/Ski Shows, etc. with the address and phone number of the producing organization. This list represents an opportunity for the Canadian Tourism plant to participate in a specific sales event on a solo basis or potentially in conjunction with the appropriate office.

## PITTSBURGH PROFILE - TOURISM

The Canadian Government Trade Office in Pittsburgh is responsible for western Pennsylvania and West Virginia. The major urban centers in the territory include Pittsburgh and Erie in western Pennsylvania, and Charleston, Wheeling and Huntington in West Virginia. After our first year of operation, it became apparent that greater Pittsburgh, with its population of 2.3 million, would be the primary focus of our promotional efforts. Pittsburgh is the home of 12 Fortune 500 companies and 13 Forbes 500 companies. The city's economy underwent a successful transition in the 1980's following the decline of the domestic steel industry. Today, the region's economy is fueled by growth in the health care, education, advanced technology, financial, light manufacturing, and service industries. By the year 2000, it is estimated that Pittsburgh will be one of the leading U.S. cities in health research.

Air access from Pittsburgh to the province of Quebec is excellent with USAir offering daily service to Montreal, (six flights); and Ottawa (three flights). A new \$600 million airport facility is scheduled for completion in June of 1992. This will open up new opportunities for additional international flights which will further impact the economic growth of the travel industry in Pittsburgh.



### Tourism Sector Situation - Travel Trade

There are over 21 tour operators with 379 travel agencies in the Pittsburgh area, all of which are selling Canadian tour products. In addition, the Pittsburgh AAA Club has 9 offices in the metropolitan area, with membership exceeding 350,000 (there are an additional 15 clubs in western Pennsylvania). Three tour operators of note in Pittsburgh handle million \$4,8 US in annual Canadian sales, and there are other operators looking to expand their Canadian sales.

In addition, there are two operators which specialize in educational tours to Canada. This provides an excellent opportunity for the Quebec travel industry to be part of a new line of Canadian tours. The Canadian Tourism office in Pittsburgh works closely with the travel trade in updating their Canadian products, conducting educational seminars, coordinating travel trade shows, and selecting buyers to attend marketplaces throughout Canada.

### Media

The Pittsburgh is in constant contact with the two daily newspapers, two monthly local corporate publications, and the West Penn AAA Monthly Motorist Magazine. We are a supporting member of PA Outdoor Writers, and have experienced great success with this affiliation. In the past year, we have successfully coordinated seven radio promotions with the top two radio stations in this territory, generating editorial coverage exceeding \$400,000 US for the Canadian partners involved. We also had the opportunity to send a national broadcasting crew from West Virginia Public Radion to the Winnipeg to Folk Festival to tape two show which were broadcast across the U.S. to 141 stations in 42 states.

### Television

Recently, while working closely with PM Magazine, were able to secure a commitment from their editor to attend the Montreal Festival of Comedy, where four segments were taped (two of which aired nationally).



### Meetings, Conventions and Incentive Travel

This office is actively involved in Meeting Planners International and the Pittsburgh Society of Association Executives. We arrange for site inspections, familiarization trips and educational seminars to meet the planners needs. Currently we have 331 planners in our WIN data base, and are in the process of developing profiles and updating contact information which will be complete by December 1990. There are presently 24 ski clubs in our territory. The two major clubs (Erie and Pittsburgh with memberships of over 2,000) are skiing eastern and western Canada annually).

### CINCINNATI POST PROFILE - TOURISM

The Canadian Government Trade Office in Cincinnati is responsible for tourism promotion in all marketing sectors (Media, Meetings Conventions & Incentive Travel, etc...), in South/Central Ohio (including the Dayton and Columbus, OH, markets) and Kentucky. There are five major metropolitan markets in the territory (Dayton, Cincinnati, and Columbus, OH, Louisville and Lexington, KY) with a population base of approximately 5.5 million. Included in this territory are headquarters for 16 of the Industrial Fortune 500s and 10 of the Retail Fortune 500s. Over the past 2 years, the primary tourism marketing focus has been on the media and Meetings Conventions & Incentive Travel areas which have been identified as having the greatest potential for development.

### Tourism Sector Situation

#### Travel Trade

There are currently 48 bonafide tour operators in the territory with approximately 50% offering Canadian programs. Discussions with many of these operators has suggested that a good number of their consumers are unaware of what Canada has to offer as a tour destination (lack of consumer exposure). The operators which are not selling Canadian product have indicated they do not receive many requests from their clients and, as such, have not developed extensive Canadian programs. With few exceptions though, they would be very interested in exploring new possibilities, and have suggested that more consumer exposure (eg - Advertising) would be of considerable benefit to them and to the Canadian tourism industry as a whole.



The Post has a database of 7.3 individual Automobile Club offices with a combined membership exceeding 1.7 million. There are also approximately 700 travel agencies in the territory. Cincinnati also liaises with the National Tour Association which is headquartered in Lexington, KY. Our office maintains active contact with these organizations through seminars, familiarization tours, trade shows and general assistance.

### Media

The Cincinnati office has focused considerable attention on the media in the past two years. As there is no Canadian private or public sector advertising in this market, consumer exposure to Canada has had to come from our media contacts. There are six major daily newspapers which we work with and two travel related television programs (Louisville and Columbus CBS Network affiliates). There are also a number of freelance writers doing work for national publications from the territory. In addition, some of our regional publications have produced substantial returns. For example, the Cincinnati Automobile Club Magazine "Motor" has a circulation of over 600,000 itself.

### Meetings Conventions & Incentive Travel

This is likely the most important sector in the territory. We have gone from no bookings in the satellite office's first year of operation to eight confirmed bookings this fiscal year to-date (approximately \$3.9 million CDN). In terms of incentive market potential, 23 of the U.S. Insurance Fortune 500's are located in the territory, in addition to one of the nations leading incentive houses, Carlson Marketing. Our Meetings Conventions & Incentive Travel database has been updated recently, qualifying the 334 existing contacts and adding as additional 390 leads.

## CLEVELAND POST PROFILE - TOURISM

The Cleveland office is responsible for northern Ohio. The Cleveland-Akron Metropolitan Statistical Area represents the 12th largest consumer buying market in the US, and the greater Toledo area represents the 78th largest buying market, with an area aggregate population of 4.2 million. The Cleveland Metropolitan Statistical Area is headquarters for 23 of Fortune Magazine's top 1,000 and 74 Cleveland-headquartered companies have annual revenue exceeding US \$100,000,000.



## Tourism Sector Situation

### Travel Trade

There are over 50 tour operators with 31 actively selling Canadian tour products and virtually all are selling or have sold Quebec products. This area has over 500 travel agencies with approximately 270 actively selling Canada. USAir and Air Ontario both offer direct air service to Toronto and Montreal, and Air Canada maintains a sales office in Cleveland. TBI Tours of Cleveland, is the third-largest US buyer of VIA Rail services, AAA Auto Clubs have 34 offices in Cleveland (17), Toledo (12) and Akron (5), with combined consumer membership exceeding 600,000. Canada is their second most requested destination from the motoring public, (primarily Ontario and Quebec). The Canadian Consulate maintains direct contact with the travel trade to assist in promoting Canada as a destination. We also work with the Canadian travel industry in offering product-testing tours, group leader tours, familiarization tours, educational seminars and marketplaces to promote Canada.

### Media

Print - The Consulate works with 12 daily newspapers, 2 regional monthly magazines and the Cleveland AAA Motorist Magazine to promote Canada as a destination. This working relationship with the local media has produced excellent coverage on Canada's tourism industry.

Electronic - The Consulate has an excellent working relationship with the CBS affiliate in Cleveland, which has promoted Canada through PM Magazine, and through their travel-segment reporter. In 1987, our office in conjunction with Tourism Quebec and Quebec visitor bureaus, escorted a TV crew from PM Magazine to film footage of Montreal and Quebec City. In 1988, our office took advantage of the Cleveland Browns/New-York Jets football game in Montreal, by having the television coverage of the game devote the entire half-time to promote the City of Montreal. We have also been actively involved in radion promotions in Cleveland, Akron and Toledo, where we have arranged to give away trips to Canada, including the Laurentians and Montreal.

Arkansas	2,181,735
New Mexico	1,511,249
TOTAL	3,692,984

### Meetings, Conventions & Incentive Travel

We maintain a qualified database of over 210 meeting and convention planners and incentive travel operators (updated 9/90). We concentrate our promotional efforts in Site Inspections with provincial, convention bureau and center representatives. In the past, both Montreal and Quebec City have worked with the Consulate in the Meetings and convention sector.

### Outdoors/Adventure Travel

Cleveland is home to public Broadcast System's (PBS) nationally syndicated outdoor show featuring Joe "Kastaway" Kulis. In 1991, this show will primarily feature Canadian outdoor adventure locations.

In January of 1991, we intend to participate in the All Canada Sport Show debut in Akron, Ohio.

We have identified 31 Ski clubs, with 4 offering trips to Canada.

The Canadian Consulate in Cleveland provide information pertaining any of the sector markets as listed above, and can provide a list of annual trade/consumer shows which present in-territory marketing opportunities. (see attached)



**CANADIAN CONSULATE GENERAL**

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Tourism Personnel

James S.A. Sotvedt, Consul & Senior Trade Commissioner/Tourism Programme Manager.

Debbie Spore, Tourism Section Manager responsibilities: Media Relations & Airlines.

Judy Love Bradley, Commercial Officer/Tourism responsibilities: meetings, conventions & incentive travel.

Sally Ellis, Commercial Officer/Tourism responsibilities: travel trade - tour operators, group travel influences, outdoor/adventure market, including ski.

Territory Served by the Dallas Canadian Consulate General are:

Texas	Louisiana
New Mexico	Arkansas
Kansas (except Kansas City)	Oklahoma

Population

Texas	16,986,510
Louisiana	4,219,973
Oklahoma	3,145,585
Kansas	2,477,574
Arkansas	2,350,725
New Mexico	1,515,069
TOTAL	32,061,000

The territory covered by Dallas including Texas, Oklahoma, Louisiana, Arkansas, New Mexico and all of Kansas except Kansas City, has a population exceeding 32 million. The 1990 census indicates that of the 10 largest cities in the United States, 3 are located in the territory covered by the Dallas consulate: #4 Houston, #5 Dallas/Fortworth and #10 San Antonio.

Indications are that the sunbelt will enjoy a continued growth trend in the years to come. Texas is currently the second largest state in terms of population and dominates the southwest economically, culturally and politically.

The economy has diversified from its reliance upon petroleum and agriculture and, while these primary industries are still vital to the health and wealth of the region, the relocation of major corporations to the territory, especially to Texas, combined with the expanding position of North Texas as a world communications center has resulted in slow and steady growth. DFW Airport has emerged as a major factor in attracting corporate relocations to this area.

There is still a strong cultural link between Louisiana, Quebec and the Acadien regions of Canada. The "Acadian Connection" has resulted in the growth of motor coach tours marketed to the francophone community in western Louisiana, cultural exchange groups.

Petroleum, agriculture, communications, aviation, electronics, high technology, military and related defense initiatives and federal scientific programmes dominate the economy of the territory.

### **CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY**

After careful review of "Tourism Marketing in the U.S.", this office responded to the stated needs of private sector and government by implementing new objectives and initiatives to specifically address their concerns. Of upmost concern to the Canadian industry is market intelligence and the development of qualified leads and product knowledge of Canadian Tourism products and services in the local travel industry. To that end, we have identified market intelligence, lead development and knowledge of Canadian products and services as priorities. These new initiatives are as follows:



### Fax Newsletter

A fax newsletter has been introduced as a cost effective vehicle which supports efforts to educate the territory travel industry. This initiative was developed as an additional method of enhancing client knowledge of Canadian products and services as well as focussing on the latest developments in the Canadian Tourism Industry. The Newsletter is distributed to the Travel Industry by facsimile.

The first several publications were well received and generated leads that were converted into group departures. This post plans to continue distribution of the fax newsletter on a quarterly basis highlighting private sector soft adventure and touring products for each season.

Fax newsletters addressing specific issues will be released as needed. In January 1991, separate fax newsletters were sent to Tour Operators, Meeting Planner/Decision makers and travel agencies advising them of the GST and explaining the rebate opportunities for the travelling public.

Provincial and municipal Governments as well as private sector are encouraged to utilize this venue to maximize exposure to group travel influencers in the post territory.

### Market Intelligence

Reporting on market and economic conditions in addition to travel trends is becoming increasingly important in identifying market potential in the various U.S. markets. This information is compiled on a monthly basis and is sent to Tourism Canada for dissemination to the Canadian Public and Private Sector, utilizing the "Tourism Canada Bulletin."

As budgets decrease and the Tourism Program becomes more streamlined, we consider the gathering of Market Intelligence to be of utmost importance in identifying the "players" in this highly lucrative industry. It is vital to spend the limited dollars we have to maximize the return in revenue to Canada by providing qualified leads to both Canadian public and private sector.

The gathering of market intelligence is integrated into our sales calls allowing us to report on the most current market conditions in our six state territory.

## MARKET SECTOR ANALYSIS

### Touring/City:

The Dallas territory boasts 235 tour operators/wholesalers, however, only a small percentage of this number are large tour operators (such as Greyhound and Dan Dipert tours). The majority are small motor coach operators with several travel products of which two or three are to Canadian destinations. There is considerable potential for expanding the product base since wholesalers are familiar with Canada and comfortable with selling additional destinations.

### Outdoor/Adventure

The market in the southwest United States has limited growth potential for the traditional fishing/hunting products but the adventure type products have more appeal for the "Yuppie" vacationer. For example, two Austin based tour operators have photo safari and nature tours. In addition, soft adventure clubs are numerous in the region. A formal marketing network does not exist for soft adventure tours, such as cycling and hiking tours, therefore, individuals often arrange their own adventure travel as a result of recommendations and advertisements placed by the private sector in upscale outdoor publications. We are attempting to top this market by targeting group influencers.

The American Volkspport Association is headquartered in Texas and approaches are being made through the AVA to influence American participation in Canadian Volksmarches.

### Ski Market

The ski market continues to be strong in Texas. American Airlines has resumed service to Calgary and Edmonton, enhancing growth for Kananaskis/Banff/Sunshine/Lake Louise regions and introducing a Jaspser winter product in this territory.

Whistler is gaining in popularity but a lack of non-stop air service from the post territory to Vancouver continues to put Whistler at a competitive disadvantage.



## Airlines

This territory is not serviced by any Canadian carrier. American Airlines and Delta Airlines continue to be the major carriers to Canada from this territory.

Canadian Airlines International Telemarketing and U.S. National Reservation Service Center is located in San Antonio, Texas. Cail has appointed a regional sales manager for the Southwest United States, based in Dallas, Texas.

American Airlines, the largest airline in the Western world, is based in FortWorth and has expanded its routes to serve five Canadian cities, including non-stop to Calgary (1 daily) and Toronto (3 daily). Direct service is offered to Edmonton and one stop service is offered to Vancouver and Montreal.

Air accessibility remains the major stumbling block, hindering the competitive position for group movements to Canada from this market.

## Meetings, Conventions and Incentive Travel

Canada is an extremely popular destination for the lucrative meetings, convention and incentive travel markets. The post territory has the third largest number of headquarters of fortune 500 companies of all U.S. posts with 53 in addition to 9 of the top 100 industrial company corporate offices.

In addition, 49 of Fortune 500 service companies are located in this territory and Texas ranks number 1 in the Forbes 400 list of privately held companies (42) headquartered in the USA.

World wide competition for the lucrative meetings market for Canadian cities and resorts is intense due to limited availability of airline service. There are non-stop and direct flights from the Southwest United States to major European centres than to Canadian cities, cooperative advertising campaigns from Canada's competitors in selected influencer oriented MC&IT publications support the marketing initiatives.

For all market sectors, (corporate, association or incentive), the unknown factor is the impact that the GST, including rebates, will have on the overall cost of conducting a meeting, convention or incentive trip to Canada.

### The Corporate, Association and Insurance Markets

The WIN Tourism Data Bank is updated annually during the spring/summer. Through research, we have identified over 2000 corporations, associations, Insurance companies and Incentive/Meeting Planning Houses headquartered in the post territory. Of this number, there are over 1050 organizations that consider Canada as a viable meeting and incentive destination. These potential clients can be categorized as follows:

Associations	400
Corporations	300
Insurance Companies	100
Incentive & Meeting Planning Houses	200

In the past few years, Texas has been the recipient of several major corporate relocations. Of note are Kimberly-Clark, Amdahl, GTE, J.C. Penney, Mishusta, Fujitsu, MCI, Exxon, and Greyline world Headquarters.

The post territory contains the 4th largest concentration of associations in the U.S. Meeting Planners International, the largest association devoted to the professional growth and advancement of meeting planners in the world is headquartered in Dallas.

Resorts are quickly gaining popularity in the corporate market sector. However, the western United States boasts first class resorts that are easily accessible by air to territory clients making it difficult to market Canada's resort destinations to the clients in this territory. Due to the availability of daily non-stop service from Dallas to Calgary and Toronto, resorts in those areas enjoy a competitive advantage to other resort products.

As a result of the accessibility issue, other major U.S. cities/resorts are the prime competitors for business from this territory. Other domestic destinations receiving a large portion of the conventions/incentive business include Hawaii, Caribbean, Puerto Rico, Virgin Islands and the Dominican Republic.



### The Incentive Travel Market

Dallas is the headquarters of Sunbelt Motivation and Travel Inc., the largest incentive house in the southwest. As a result of the close working relationship developed with sunbelt by this post, Canada is often a recommended destination for sunbelt's Corporate & Insurance Clients. In addition, this office coordinated the annual sales trip for sunbelt's top program managers and their top clients to Canada this year.

Other Incentive travel companies located in the post territory include Sahliyah; Global enterprises, Inc; MCI Meeting Planner, Journey House Planners, Inc; Travel Planners, Inc; Group Incentive Travel and a large regional office for Maritz meeting planners. In addition, Lifeco, a large nationwide multi-purpose travel company recently acquired Travel Stars and Motivation, an established incentive house to create a new in-house Incentive Branch called Lifeco Motivation.

The Southwest boasts one of the nation's largest concentration of Insurance company headquarters. Travel is still the largest single motivator for an Insurance agent, and for those Insurance companies that can no longer rationalize or afford a first class Incentive trip to Europe, Canada is viewed as a viable alternative destination.

Unfortunately few cities that easily attract the Incentive Market include Honk Kong and western Europe with a focus on England, France, Italy and Switzerland.

There is a concern that we will begin to see aggressive marketing activities undertaken by members of the European community to attract MC&IT business to an United Europe. The "European Economic Community" will be in place by December 31, 1992 and 12 European countries will be able to pool their resources to attract the lucrative U.S. Meeting, Convention and Incentive Travel Market.

### Upcoming Meeting, Convention and Incentive Travel Marketplaces

"Showcase Canada" will be held May 8th, 1991 in Houston and May 9th in Dallas. In 1990, 37 Canadian Exhibitors participated in this MC&IT Marketplace and film viewing event. Over 250 clients attended "Showcase Canada" in 1990. Serious clients from across the six state territory will be flown to either city to attend this event.



In conjunction with this MC&IT marketplace, the post conducted educational seminars for clients on the recent streamlining of customs rules and regulations for delegates attending trade shows and conventions in Canada. This year, seminars will be added to address decision makers concern with GST Tax and its ramifications.

These marketplaces are followed by site inspection visits/ familiarization tours coordinated with the provincial and municipal governments. These continue to prove to be the best venue for introducing serious clients to Canadian cities and resorts that best suit their meeting needs.

#### Tour Operators/Wholesalers

There are approximately 235 tour operators/wholesalers in the six state territory of which 69 currently offer Canadian travel destinations. Three tour operators conduct tours strictly for recreational vehicle caravans/rallies. The AAA has 40 offices in the southwest with the regional headquarters located in Houston.

Of those wholesalers & tour operators with Canadian products:

- 77% have motorcoach tours
- 56% include motorcoach/air products
- 19% currently include motorcoach/rail products
- 35% include motorcoach/cruise products

#### Future Plans/Promotional Activities for Travel Trade

This office utilizes current computer profiles on all tour operators/ wholesalers in the territory to identify and encourage product development of Canadian destinations. This is achieved by inviting buyers to Rendez-vous Canada, identifying influencers to attend provincial and city reverse marketplaces and participation on individual Visit Canada Program initiatives.

In addition the post organizes and coordinates a series of educational seminars and marketplaces for group travel influencers only. Participation is limited to approximately thirty Canadian and American exhibitors.



In 1991, "Experience Canada" will be held:

February 18: San Antonio  
February 19: Austin  
February 20: Houston  
February 21: Dallas/ Fort Worth

### The Ski Market

The Texas ski market is one of the largest in the United States and while Colorado is tough competition, other ski destinations boast a large number of Texas visitors. The major tour operators based in the territory are adventure tours and DFW tours.

Adventure tours has recently discontinued its chartered Air service program to Banff and is working to develop a package utilizing scheduled Air service. DFW tours will continue to offer a 5 day program to Calgary using scheduled Air service on Delta Air Lines.

Thanks to Ski magazine's survey listing Whistler as the second most popular Ski destination in North America, interest has substantially increased in this growing resort area of Canada. However, Air accessibility remains a stumbling block to British Columbia with no non-stop service to Vancouver.

The Texas Ski Council continues to be a dominant force in the ski industry. The Council sponsors 4 annual trips; three domestic and one International. The International Ski trip usually attracts between 800-1400 skiers and Banff has been chosen in March 1988 and also January 1991. In addition, individual club trips are coordinated by each of the 21 member clubs.

### American Automobile Association

The post, in cooperation with Tourism British Columbia and Tourism Yukon, has developed a series of seminars for auto counsellors and travel agents located at AAA offices in Houston, Dallas, Oklahoma City and Tulsa. This bi-yearly program is delivered with support for VCP trade to the Yukon in alternative years.

### Recreational Vehicles

There are three operators of recreational vehicles caravan tours in this territory, all of whom have Canadian products. This office is working with them to expand their product base with the goal of generating tourism revenue in areas of Canada that normally do not receive large numbers of visitors from the southwest United States.

### Retail Travel Trade

The Dallas post has identified as a priority initiative the creation of a computer data base in support of the Travel Trade Programme.

The post maintains a current data base of more than 2400 retail travel agents in the territory, with profiles on each agency featuring Canadian products. Group travel agents have been identified and more extensive profiles have been created on those specific accounts.

A separate data base has been created providing a detailed profile of the twenty largest travel agencies in each major urban area. Product specific listings have also been developed to assist this office in responding to the needs of the Canadian private sector in marketing their products in this territory.

Extensive research has been conducted to identify those retailers that specialize in different leisure products. A data base has been created by agency with special codes indicating ski, adventure, golf, group travel influencer, etc. Separate listings of the different adventure clubs have been created, for example, fly fishing clubs, hunting clubs, taxidermy groups, biking clubs, kayaking/canoeing clubs, environmental groups, motorcycle, horseback riding, hiking and gliding/ballooning/ultralight clubs, etc.

The post has recently created another data base to take advantage of leads generated by individuals who escort a small number of groups, themselves. These group tour leaders, who are not travel agents, select the Canadian destination and plan the entire itinerary by themselves, with technical assistance provided by the post.



### Media Relations

There are 3011 Media outlets in the post territory, including 284 daily newspapers, 1,106 weekly newspapers, 189 television stations and 1,432 radio stations.

The Visit Canada Programme (Media) has been highly effective in introducing new Canadian destinations to the American consumer as well as reinforcing marketing support of the better known gateway cities. Assistance to a journalist may include an Air ticket to the Canadian destination, itinerary planning, programme coordination with provincial/territorial/municipal tourism authorities, editorial research and assistance in obtaining photographs, either from the post's photo library or from sources in Canada.

### MAJOR PUBLICATIONS

The largest publication in the territory is American Way Magazine. American way is the in-flight magazine of American Airlines and is published bi-monthly with a circulation of 1.6 million copies.

The second largest publication in the territory is "Boys Life", published by Boy Scouts of America, with headquarters in Irving, Texas. The circulation of this monthly magazine is 1,365,000 copies.

AAA World, the American Automobile Association Publication, publishes 640,000 copies bi-monthly for Texas, Oklahoma and New Mexico.

"Texas Monthly Magazine", with a circulation of 300,000 is an upscale magazine with circulation in Texas and four adjoining states. "D Magazine" ("D" for Dallas), another upscale publication, has a circulation of 86,000.

As expected, there are numerous product specific publications, most located in Texas, serving, for example, the petroleum, communications, electronic and high technology industries.

Daily Newspapers

Most of the major daily newspapers carry a travel section, usually in the Sunday editions. The fifteen principal newspapers are:

PUBLICATION	CIRCULATION	
	(DAILY)	(SUNDAY)
Houston Chronicle (Sunday edition includes Texas Magazine)	406,000	531,000
Dallas Morning News (Sunday Edition includes Dallas Life Magazine)	389,605	565,164
Dallas Times Herald	344,158	346,495
Houston Post	309,400	356,424
New Orleans Times-Picayune	274,302	341,805
Fort Worth Star Telegram	265,855	341,176
Daily Oklahoma (Oklahoma City)	240,000	330,000
San Antonio Express News	178,000	246,000
Austin American Statesman	171,000	212,000
San Antonio Light	153,000	226,000
Little Rock Arkansas Gazette	141,000	202,000
Tulsa Tribune	128,000	234,000
Wichita Eagle-Beacon	124,000	194,000
Albuquerque Journal	117,000	151,000
Little Rock Arkansas Democrat	104,000	190,000



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Personnel

Bas Bouma, Consul & Senior Trade Commissioner

Martin M. Rice, Senior Commercial Officer - Tourism. Supervises and is responsible for all promotional activities undertaken within the travel trade, meetings and conventions and media sectors. Coordinates federal/provincial/territorial and private sector liaison to deliver the tourism program.

Anne Cascadden, Commercial Officer. Responsible for travel trade, media and outdoor development.

Heather Phelps, Commercial Officer. Responsible for Meetings, Conventions and Incentive Travel, with related duties to media.

Cheryl Clark, Secretary/Travel Counsellor.

Overview

The Posts territory's (Indiana and Michigan) proximity to Canada provides a wealth of excellent marketing opportunities and challenges. The main mode of travel into Canada is by "rubber tire", either by automobile and motorcoach. There is a strong Via Rail presence by which it is estimated that 150,000 territory residents travel to all areas of Canada on an annual basis on Via out of Windsor, Ontario. The bulk of these moves are mainly to Toronto and Montreal.

For accessibility to Canada there are four major entry points into Canada from the State of Michigan (a) Detroit/Windsor Tunnel (b) the Ambassador Bridge (c) Sarnia d) Sault Ste Marie.



Annually over 11 million US residents utilize these border crossings to visit Canada which represents over 33% of the total visitors to Canada. Over 15 million people live less than a days drive. With the current world situation, many would be US residents that were planning a vacation to Europe are changing their travel plans and are staying closer to home. Therefore, this lends itself to an excellent opportunity for Canadian travel, industry partners to further develop it's product line within our territory.

All of our product segments, TOURING, CITY, OUTDOORS, and MEETINGS, CONVENTIONS and INCENTIVE TRAVEL are showing an increase in generating additional revenue to Canada and we believe there is a strong potential for more growth.

The Canadian Consulate General in Detroit has a staff of knowledge professionals that can provide you with an abundance of territory market intelligence and expertise. Our promotional programme activities which we organize and coordinate include familiarization tours, educational seminars, NEBS Missions, travel trade marketplaces, site inspections for MC&IT, travel trade and media contacts. One of our main priorities is assisting our Canadian travel industry partner with up to date and precise market intelligence.

### **CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY**

#### **Touring**

The target groups for our Post in the Touring segment are Automobile Clubs, tour operators/wholesalers and special groups, such as seniors, group leaders and influencers, as well as parks and recreation decision makers.

#### **Automobile Clubs**

The Michigan Automobile Club has 35 branch offices throughout the state and 1.5 million members. It is the third largest auto club in the United States and is a strong backer of the Canadian Tourism Industry plant. Our territory experienced a sizeable increase in Michigan AAA traffic in 1990. The members of the Michigan AAA stayed closer to home in 1990 which was reflected in their figures to the end of November '90 where it showed that traffic and trip tiks issued to destinations in Canada were up 2.5% and more specifically of the 34,548 trip tiks issued to members requesting Canadian destinations, 27,677 were for the Province of Ontario, which was a significant increase of 5% over 1989. They also anticipate by the year end '90 that over 210,000 touring books to Canada will have been issued statewide to members.



The Hoosier (Indiana) AAA, which has over 340,000 members distributed over 30,000 touring books to Canada as well as in excess of 12,000 trip tiks to Canada in 1990.

Significant inroads have been made with both clubs over the past few years in which our Post co-sponsored 8 separate promotional events, marketplaces and educational seminars in 1989/90 with the Hoosier and Michigan AAA.

#### Tour Operators/ Wholesalers

From our territory there are over 185 tour operators and wholesalers that actively sell Canada. Due to the proximity, awareness and the excellent editorial coverage that portrays Canada as a most favourable destination, Canada is still ranked near the top in group requests. It is estimated that over 275,000 individual package tours are sold to Canada on annual basis from the MI/IN territory. Due to the uniqueness of this territory it is estimated that retail travel agencies sell between 3 to 6 special group movements to Canada annually without using the services of a local tour operator or Wholesaler. An agency can amass a higher yield when dealing with the Canadian Tourism supplier.

Our office also organized and created the "CANADA ON WHEELS" concept in which we utilized a portable classroom in conjunction with partners to travel throughout the State of Michigan for 5 days. This resulted to stopping in 13 major cities, visiting over 70 high profile/qualified travel agencies that actively sell Canada as well as agencies that have growth potential to sell Canada. The portable classroom provided learning and educational facilities with respect to the Canadian product line. Travel literature, package tour information, brochures and current travel videos on various destinations in Canada were presented to the agencies. We plan to expand this programme in 1990/91.

#### Special Groups

There is a high density of senior citizen clubs in our territory which offers the Canadian tourism industry another potential client base to further expand and develop. In working closely with this segment we have found that our seniors have a) disposable income to spend on travel b) the desire and time to travel, and c) average 4 trips annually. d) prefer 3 to 4 day trips as opposed to longer duration trips. The major tour operators (Tower Bus, Bianco, Charter Bus Unlimited, Indian Trails) report that Canada ranks close to the top for these mini trips by seniors.



## City

In the city Market Segment our office has sponsored VCP Media trips to Alberta, Ontario and Quebec and Eastern Canada, which was resulted in a considerable amount of positive print for the Canadian travel industry as well as generating editorial value in excess of \$1 million. We liaise with major territory newspapers and publications as it pertains to the travel industry.

In expanding and further facilitate new tour development in the City market segment, we have secured qualified tour operators and group decision makers/influencers for site inspections to all areas of Canada and look forward to continued growth and tour development in 1991/92. It is important to note that there has been considerable amount of interest in longer haul destinations (i.e. Eastern and Western Canada) in the past fiscal from our territory. Some tour operators reported an increase in request and sales in 1990 and plan to further expand their product line in 1991.

Also, there is a shift in clients purchasing weekend getaways, particularly to Toronto, Montreal and Quebec City. Though members have particularly to Toronto, Montreal and Quebec City. Though members have not increased a tremendous amount, due to competition from such US cities such as Chicago and Indianapolis, the Canadian destinations are securing upper income clients who produce higher yield and dollar volume as well as wanting the more UPSCALE type of weekend. (i.e. Phantom of the Opera). The strong Canadian dollar or the implementation of the GST does not seem to be a concern of these high income executive men and women who are willing to pay premium prices for weekend or mid-week packages as long as the value is there. One major tour operator from our territory reported an increase of 15% in sales at this targetted audience in 1990.

## Outdoors

There are a number of major sport shows in our territory including those that market soft outdoor vacations, boating, hunting, fishing, camping and recreational Vehicles. There is a great amount of interest from consumers towards Canada in such shows like the All Canada Outdoor and Vacation Show that takes place every Jan-Feb. in Lansing, Pontiac Mi. and Fort Wayne In.



The demographics of our territory indicate that there is a high potential for outdoor activities. It is imperative to expand this market segment and we believe the potential for growth for the 90's is extremely high. To capitalize on this market, our post initiated a series of 4 outdoor lecture seminars inconjunction with Bivouac Tours in which over 400 travel related clients attended in November.

### Skiing

In the past two years this post has been very successful in further expanding and developing the growth in the Canadian ski market. We are within a one days drive to major ski destinations, particularly in Ontario and Quebec. There has been a substantial increase in longer haul destinations (Alberta and British Columbia) from our territory.

The Metropolitan Detroit Ski Council has 38 clubs with a current membership of 12,000 active skiers. Our office has coordinated many promotional events inconjunction with the MDSC and our private industry partners. Such activities like the Ski Can promotion held every June has generated added interest and revenue that increases annually.

Further we have implemented the All Canada Ski show which proceeds the Fall Toronto Ski Show every October. We have been very encouraged by the positive feedback received from our 27 partners that participated and the amount of real and potential business that they have generated from this promotion. We plan to further expand this event in 1991.

### MEETING, CONVENTIONS AND INCENTIVE TRAVEL MC&IT

Our priority in 1990 was completed when we updated and qualified over 600 companies, corporations, associations and meeting planners in our Win Tourism Database. As a result, major partners in Canada have been provided with current and viable leads pertaining to their particular area that was requested and shown an interest by the meeting planner (i.e. all leads that requested Banff as a possible site for future meetings were past on to the Banff area for follow-up.)

We anticipate that our Post will organize 15 site inspections to Canadian destinations in 1991/92 which will further generate an additional \$15 million in revenue to Canada.

In an effort to expand and follow-up present data available, the Detroit Post plans to embark on an indepth sales call programme early in the spring to all qualified leads as well as potential new leads and clients in the MC&IT Sector. This will serve a two fold purpose.

- a) sustaining an awareness of Canada as a prime Meeting/Convention/Incentive destination, as well as,
- b) educating potential customers with respect to the GST

Our office is active in many State MC&IT related organizations such as:

Southeast Michigan Society of Association Executives in which our Tourism Manager, Martin Rice will become President in May 1991.

Michigan Meeting Planners International

Michigan Society of Association Executives

Indiana Society of Association Executives



**CANADIAN CONSULATE GENERAL**  
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Tourism Personnel

John Schofield, Consul & Trade Commissioner (Tourism)

Monica Campbell-Hoppe, Commercial Officer (Tourism Media)

Jennifer Clark, Commercial Officer (Travel Trade)

Denise Henick, Commercial Officer (Meetings, Conventions and Incentive Travel)

Lisa Zaherie, Senior Administrative Assistant and Travel Counsellor

Josephine Lozano, Administrative Assistant and Travel Counsellor

Territory Southern California (10 southern counties); Arizona; and Clark County,  
Nevada (Las Vegas)

Provincial Representation in Territory

Alberta, British Columbia, Ontario and Quebec

Population 22,000,000 legal residents, including sizeable numbers in the oriental, hispanic and black communities, as well as nearly a million Canadians.

Assistance Available from Post

- Local market intelligence, qualified tourism leads (WIN Tourism database)
- support with new tour development
- help with familiarization tours and site inspections
- aid with media representatives
- workshop seminars
- list of consumer/travel trade shows
- promotional assistance
- loan of films and videos.

Travel Trade

Tour wholesalers/operators - 450  
Retail travel agents - 3,600

Meetings, Conventions & Incentive Travel

Corporations - 300,000  
Associations - 3,200  
Meeting Planners - 600  
Incentive Travel  
Planners - 700  
Trade Show  
Organizers - 15

Tourism Media

Radio Stations - 674  
Television Stations - 301  
Daily Newspapers - 87  
Weekly Newspapers - 404  
Magazines/Periodicals - 100  
Freelance Travel Writers - 250  
Ethnic Weekly Newspapers - 75



### Other Influencers

Motor Clubs - 90  
Cruise Lines - 2

### Foreign Government Tourist Offices in Territory

50

## OVERVIEW

### 1. General

Southern California continues to be a very dynamic market; if it were a separate nation, it would rank as the world's 10th largest in terms of Gross Domestic Product, with a growth rate of 2.5% annually in real terms for the foreseeable future. The rapid growth in population and affluence of the Southwest is outpacing all regions of the U.S., and residents here are well-known to have high propensity to travel, increasingly on short notice for short-duration trips. Californians take pride in their reputation for innovation and trend-setting. Among the fastest growing employment opportunities are high technology, biotechnology, engineering, business services, communications, and personal services.

Both California and Arizona have a very close affinity to Canada. Canada was brought "nearer and dearer" to them with Expo '86 and the '88 Winter Olympics, and their interest in Canada is high. California strongly supported the Free Trade Agreement (FTA) with Canada.

### Opportunities and Problems

Canada can continue to make a positive impact in this marketplace (including Arizona) by emphasizing its strong points: foreign yet familiar (same language, similar currency); natural scenery; a wide variety of vacation opportunities; excellent value for money (favourable exchange rate); friendly neighbour; safe, clean and sophisticated cities; close by and easy access (no passport needed). The FTA will foster increase traffic flow, particularly in the Meetings, Conventions and Incentive Travel (MC&IT) segment, and it is hoped that this will help to improve the current cumbersome customs procedures. Some notable success has been generated from some major celebrity ski events out of this market (to Quebec City, Whistler and St. Saveur), although actual measurable



results are uncertain. Of particular benefit is the excellent and extensive media coverage that Canada is receiving as a result of our Visit Canada Program (Media). Our increased utilization of computer technology (WIN Tourism) will enable us, over time, to become more effective; as more associations are moving here from the East, this will be particularly productive with our MC&IT databank. Similarly, high technology is revolutionizing the travel industry, from reservations to marketing (e.g. laserdisk videos).

Awareness of Canada as an attractive travel destination is still low. We suffer from a bland, cold image which must be dispelled. The vast amount of movie filming that is heading to "Hollywood North" (Toronto, Montreal, Vancouver, Edmonton and Calgary) is helping a great deal and affords additional opportunities, but we need to find our version of a "Crocodile Dundee" and Paul Hogan. Although Canada is still seen as being affordable in this affluent market, the two October stock market crashes and slowing economy have tended to make travellers more discerning. The significant strengthening of the Canadian dollar poses a threat to our competitiveness, as does the upcoming 1991 GST. And competitive this market really is. Everyone is here, in force, vying for the travel dollar; millions of dollars are also being invested to encourage Californians to vacation domestically. At present, the transportation links to Canada are inadequate and too expensive. It is hoped that the FTA and "open skies" negotiations will lead towards ameliorated transportation links between Canada and the U.S. With the changing face of Europe in 1992, travel to Europe will become more attractive and competitive as airline regulations, border controls and taxes will all be eased. Similarly, with reform in Eastern Europe, this region is an attractive travel destination in our marketplace.

## 2. a) Travel Trade

Southern Californians have a demonstrably wide palette of vacation interests, including an array of sporting, fitness, cultural and self-improvement experiences. Canada has the potential to cater to more of these new markets, but a lot of research and substantial plant development needed. While the Federal/Provincial Sub-Agreements have "sunsetted", new Regional Alliances could afford opportunity. It is unfortunate that Canada lacks a truly major international event to come over the next several years. We need to add new destinations and expand the travel season to increase our market share. Several tour operators have been successful in fitting new products to this market, from heli-hiking and heli-fishing to the Duchess golf bus. There is a mushrooming demand for cruise vacations, and with that, an increasing interest in pre-and-post cruise tours. Resort experiences are also in demand -- viz: the success in this market of Tyax



Mountain Lake Resort & Whistler/Blackcomb resort area. The increasing violence, smog and traffic in Los Angeles present opportunities for marketing "getaways" such as Canada. There is a growth in numbers of the senior market, opening up potential for the touring product and R.V. travel. There is a noticeable trend away from "sunning" vacations due to a fear of skin cancer. Tour operators specializing in the young singles market claim that the AIDS epidemic is tending to steer clientele away from traditional singles products. This market is extremely sophisticated, and all marketing approaches should be well thought out and selective. Rendezvous Canada continues to be the best overall marketplace amongst the current proliferation of marketplaces.

b) Touring Product

The largest product segment in this territory, it is magnified due to the immense and growing seniors/mature travellers population retiring in this area. A major portion of vacationers from this market is generated by wholesalers headquartered outside of this territory via a local regional sales office. Destinations are wide-spread across Canada, but are most often in Western Canada.

c) Outdoor Sport/Adventure Product

Our second-largest vacation segment, this product is strong due to the younger, monied couples/singles looking for both soft and hard adventure. The ski market is particularly vibrant into B.C. and Alberta, with Whistler gaining an ever-increasing flow of Southern Californians.

As the birthplace for the "New Age" movement where traditionally new ideas, philosophies and lifestyles have been given much attention with emphasis on health and spiritual growth, the Southwest affords a vast market for environmentalists and holistic lifestyle adherents. Although affluent, this group eschews traditional types of travel,

seeking alternative activities such as bird-watching, photo-safaris, cross-country skiing - travel experiences where one can "be in touch with nature" and have the opportunity to explore the body, mind and spirit through new experiences.

Many tour operators are experiencing the growing travel phenomenon "ecotourism" -- defined as tourism that aims to promote conservation of the natural world.

d) City Product

This type of experience is growing as affluent travellers seek short "getaways" to relieve stress and explore somewhere new.



e) Resort Product

Currently representing a small portion of our vacation traveller market, this segment promises to take on a growing importance in this territory into the 1990's -- for properties from large four-season entities to small single-season fishing retreats.

f) Future Plans

This Post is active in facilitating new tour development, and matching up product opportunities with market interests; this is done partly through our Visit Canada Program (Trade). We're updating our WIN Tourism (Travel Influencer) database to realize this objective. This will also assist us with the appropriate selection of contacts for Rendezvous Canada and other marketplaces.

In January 1991, we will organize and host a series of sales and marketing seminars for the travel trade. These events will be primarily educational in nature and feature in-depth workshop classrooms highlighting the Canadian products of participating wholesalers, complemented by a suppliers marketplace. The Spring/Summer/Fall Seminars ("The 1991 Canadian Collection") will take place in four key locations throughout Southern California during the first week of January. Guest attendees will be pre-qualified via our Partners in the event.

3. TOURISM MEDIA

a) General

Los Angeles is the media centre of the West Coast, and as such represents a market of unlimited scope. It's the home of major media opportunities through Hollywood, celebrity travel extravaganzas, national magazines, and hundreds of tourism freelancers distributing nationally. By proactively and selectively targeting our media focus, we are able to have a significant impact upon the market's awareness of Canada as a favourable travel destination, thereby facilitating our promotion of both leisure tour and travel and MC&IT business.

b) Print Media

Many national magazines which carry travel-related articles are based in this territory. Most are very vertically-oriented, thus affording excellent opportunities to highlight specific products. Modern Maturity, AARP's magazine for seniors, is headquartered in



Los Angeles, is highly read and has a national monthly circulation of 16 million. Other interesting national magazines include Travelling Times (1.7 million monthly), Bon Appetit (1.3 million monthly), Shape (850,000 monthly), Performing Arts (825,000 monthly), Men's Fitness (780,000 monthly), Architectural Digest (685,000 monthly), Highways (Good Sam Club- 670,000 monthly) and Muscle & Fitness (650,000 monthly).

Numerous local glossy magazines containing travel sections cater to affluent local lifestyles: e.g. Family Living (1 million monthly), Westways (AAA - 500,000 monthly), Senior World of California (500,000 monthly), California Magazine (350,000 monthly). Of the 87 daily newspapers in the territory, the major ones are the Los Angeles Times (1.6 million daily), the Arizona Republic (550,000 daily), the Orange County Register (450,000 daily), and the San Diego Union (422,000 daily) and the L.A. Daily News (275,000).

#### c) Travel Writers

Many of the 250 excellent freelance writers in this territory are featured across the country. Among these, 101 are active members of the Society of American Travel Writers, as is the Post Tourism Media Officer. Some fifty of the freelancers are members of the Outdoors Writers Association of America, 24 are members of the North American Ski Writers Association, and 43 are members of the International Food, Wine and Travel Writers Association. Others are also members of such groups as The American Society of Journalists & Authors and the Travel Journalists Guild.

#### d) Electronic Media

Hundreds of nationally influential television and entertainment production companies are based in this area, including, "Lifestyles of the Rich and Famous", "Entertainment Tonight" and "Outdoors News Network".

#### e) Future Plans

Much of our Visit Canada Program (Media) is conducted with professional, productive freelance writers who contribute not only to local publications such as the Los Angeles Times, but also on a regular basis to such dailies as the Chicago Tribune, Chicago Sun Times, Miami Herald, Christian Science Monitor, San Francisco Examiner, Detroit Free Press, Boston Globe, etc. as well as major national and international magazines. Some of our local freelancers also work with the Copley News Service based in San Diego, whose services extend to 275 papers nationally as well as with other syndicates. Many of



these writers also produce guide books, travel books, videos, host radio travel shows, and so on.

Over the past years we have been most successful in generating coverage for Canada in all areas of the media, resulting in a total of \$3.5 million print publicity value for the first six months of FY 1990/91. As our data base increases, we expect to reach more and more media and to further target specific markets in the selling of Canada. Although our promotional budget is significantly reduced, we have a full-time tourism media officer and expect that with the continued help of the provinces/ territories and the Canadian tourism industry, we will expand our field of activity to take full advantage of the affluence and mobility in our territory.

To help us with our objectives, we request from the Canadian travel industry new product information, especially on adventure travel, spa and health facilities, luxury travel, train travel - anything geared to the segments described above - accompanied by press-releases, B&W photos, colour slides and videos if available. We would also appreciate being kept informed of any media activity or contact initiated from Canada into our territory so that our marketing efforts can be well coordinated, not duplicated.

A West Coast Canada Media Marketplace was initiated last May in Los Angeles for the first time, drawing 100 quality media from the Consulate territories of Los Angeles, Seattle, San Francisco and Dallas. The Media Marketplace next year will be held at the Doubletree Marina Beach Hotel, a newly acquired Canadian Pacific Hotels and Resorts property, from April 30 to May 2, 1991.

#### **4. MEETINGS, CONVENTIONS AND INCENTIVE TRAVEL**

##### **a) General**

With the growth and wealth coming into this territory, the potential for MC&IT business is extremely exciting and lucrative. Given the growing supply of convention centres in Canada and the impressive per person revenue from MC&IT visitors, these are areas of the market we can't afford to ignore.

##### **b) The Corporate and Associations Market**

The California almanac for 1988 lists close to 300,000 businesses in Southern California alone. Associations number around 3,200. On an annual basis, our MC&IT WIN Tourism database is updated (through mail survey and telemarketing methods) to



provide the Canadian tourism industry with qualified leads and to notify them of any changes in the profiles that have already been forwarded. As of December 1990, listed in WIN Tourism are approximately 840 association and corporate contacts who have the potential to meet in Canada. The list has recently been revised to eliminate any clients who were not well-qualified. Our target is to enhance the list at an annual rate of approximately 300 highly qualified leads.

c) The Incentive Travel Market

In the Los Angeles Post area, there are approximately 700 incentive travel planners. Although the Southwest is not as well known as the Northeast for its incentive industry activity, new clientele for incentive travel to Canada is steadily increasing. Presently we have 80 incentive travel planners listed on WIN Tourism who are interested in using Canada as a destination for their groups.

d) Future Plans

We have an active and qualified selection of travel influencers planned to participate in Canadian site inspections throughout 1990 penetrating most regions of Canada. We also have several highly targeted seminars, as follows:

- January 24, 1991 - All Canadian Resorts Promotion, Los Angeles
- March 1990 - Montreal/Toronto Promotion, Los Angeles

Properties should contact their local bureaux to receive lists resulting from these and other promotions.

**CANADIAN CONSULATE GENERAL**  
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Tourism Personnel

Bruce D. Verner, Consul & Trade Commissioner/Tourism, Program Manager, also responsible for Media; Corporations; Airlines; Outdoor/Adventure market.

E.P. "Ernie" Konstas, Commercial Officer/Tourism - Responsibilities: Meetings, Conventions & Incentive Travel (except corporations); Wholesalers and Tour Operators; group travel influencers

Pam Loberg, Travel Trade Assistant - Responsibilities: Retail Travel Trade, auto clubs, Ski market, administrative support.

Territory Served by the Minneapolis Canadian Consulate General are

Minnesota	North Dakota
Nebraska	South Dakota
Montana	Iowa

(except Quad Cities)

Population 11.8 million

This six-state territory, while sparsely population, is one of the strongest and best balanced regional economies in the U.S. and hence represents an important market for Canada.



In area, the territory represents 14 percent of the U.S. but it contains only 4.5 percent of the nation's population. Its density is only 21 people per square mile (compared with 64 for the entire country), ranging from 50 people per square mile in Minnesota and Iowa to 5 1/2 in Montana. About a fifth of the total territory population is in the Twin Cities metropolitan area of Minneapolis/St. Paul (pop. 2.45 million). Add Omaha/Lincoln (835,000) and Des Moines (380,000) and you've got nearly a third of the total territory population.

Agriculture, natural resources and high technology are the basis for the economy of the territory.

#### Assistance Available from Post

Market intelligence	Sales leads/referrals
Counselling to travel industry	Joint promotions/seminars
Assistance in coordinating activities in territory	WIN Tourism Database
	Newsletter to travel trade, media, and MC&IT markets.

#### CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY

##### Touring/City

One of the newer concepts being introduced to this market is the start up of new cooperative charter ventures between transportation carriers and a tour operator. Two examples are ITA Vacations (Eagan, MN) new charter service with United Airlines to Seattle onto which they plan to attach optional land packages to Vancouver and Victoria and American Rail Tours/Travel Headquarters (Owatonna, MN) new program with Amtrak to Grand Forks, NE and optional motorcoach tour to Winnipeg. Continuing as in past years, there has been an upward growth in the number of new tours to Canada, especially with the large operators -- on average 2-3 new tours each year. The "Mystery Tour" concept has proven very successful in this area to introduce many of these new Canada tours and the potential to capitalize on this for short 3- to 4-day trips is high.

##### Outdoor/Adventure

There are approximately 35 major sportshows in our territory including those that also market boats, motors and fishing equipment, the largest being the Greatest Northwest Sportshow, every March in Minneapolis. To date, there are over 250 Canadian exhibitors; average attendance is 150-200,000 people. In addition, the All-Canada



Outdoor/Adventure Vacation Show features Canada-exclusive product. Currently the organizers of this show only do promotions in the Upper Midwest area (Michigan, Illinois, Missouri, Wisconsin, Minnesota).

### Skiing

Destinations being considered are Whistler/Blackcomb and Mont Sainte Anne. These will be considered only if the airfares are competitive with those to U.S. areas such as Vail and Aspen, which, in the past, has been the biggest obstacle to promoting Canadian ski destinations.

### Meetings, Convention and Incentive Travel

In this territory are 25 Fortune 500 industrial companies, 20 Fortune 500 service companies and 15 of Forbes' largest private companies, including the largest. There are an estimated 850 companies with designated meeting planners, plus 250 national and international association headquarters (150 trade and professional; 100 avocational).

## MEETINGS, CONVENTION & INCENTIVE TRAVEL

### The Corporate and Association Markets

In our MC&IT Data Bank (updated annually), we have profiles on 827 organizations, corporate and association, (lists of qualified leads can be made available). Of these, 461 have potential to meet in Canada and 366 will not or cannot meet in Canada ("negative response/ files).

### The Incentive Travel Company Market

The Twin Cities, in particular, is one of the incentive industry centers of North America. One of the most critical "conglomerates" is The Carlson Companies -- one of the largest privately held companies and the largest travel organization in North America, headquartered in Minneapolis. It includes such firms as E.F. MacDonald Travel (the largest incentive travel firm in the world), GTD (formerly GTU), Radisson Hotels, Carlson Travel Network (formely, Ask Mr. Foster -- the largest retail travel chain in the U.S.), and P. Lawson (the Canadian retail travel agency chain).

Other major meeting and incentive travel companies headquartered in the territory include Business Incentives, Northwestern Incentive Services, World Travel and Incentives and Graham Marketing Group (headed by S.I.T.E. President Richard



Graham), all in the Twin Cities, and ITA in Des Moines. Among the 25 such firms in the territory, there are many smaller, very productive companies.

#### Upcoming Special MC&IT Promotions

##### "Showcase Canada" Marketplaces

February 26, 1991 - Omaha, NE  
February 27, 1991 - Des Moines, IA  
February 28, 1991 - Minneapolis

#### TRAVEL TRADE

There are approximately 1250 retail travel agencies in our six-state territory. In addition, there are 85 AAA Clubs and 48 Wholesalers/Tour Operators. In 1989, there were 255 tour programs offering Canada product which generated over \$9.5 million (CDN) in revenues. Of these Wholesalers/Tour Operators:

64% operate a combination of air/motorcoach tours;  
33% are exclusively motorcoach;  
3% include motorcoach/rail product.  
25% do pre-formed groups only.

#### Future plans/promotional opportunities

The Minneapolis Canadian Consulate General works very closely with Wholesalers/Tour Operators, updating Profiles (copies of which can be made available), maintaining a high profile by yearly sales call visits, new product/development mailings, Rendez-vous Canada participation and Visit Canada Program (Trade) site inspections/familiarization tours. Both our knowledge of their operations and tour offerings, and their familiarity with our office and the types of assistance available, has proven most effective when considering joint projects/initiatives.

In addition, this office publishes a newsletter which is mailed to approximately 2500 members of the travel trade, meeting/incentive planners and media.

As well as supporting the provincial and municipal marketplaces/ familiarization tour activities, this office conducts a series of spring/summer/fall product launches, known as "Experience Canada", as follows:

- March 18, 1991 - Omaha, NE
- March 19, 1991 - Des Moines, IA
- March 20, 1991 - Rochester, MN
- March 21, 1991 - Minneapolis, MN

### **SKI CLUBS & OUTDOOR/ADVENTURE MARKETS**

#### **Skiing**

The major ski market consists of 22 member clubs affiliated with the Minnesota Ski Council (MSC). Membership totals approximately 4,000 with the largest memberships at ULLR Ski Club and Sitzmark Ski Club, averaging about 750 members each. The MSC's main outlet with which to reach the largest number of members is the Minnesota Skier tabloid newspaper which contains stories on club activities and destinations, and advertising from representatives of the ski industry such as sporting goods outlets, ski areas, hotels/motels/winter resorts, etc. There are 3 major functions at which to promote ski products in the Twin Cities, those being 1) the Ski, Snowmobile & Winter Sportshow (Minneapolis-November); the Tribune Travel Trade Show (Minneapolis-fall); and Ski Group (Minneapolis-May).

#### **Outdoor/Adventure**

This type of activity, mainly fishing and hunting, is very strong from this market. For example, based on a survey of visitors travelling exclusively for the fishing/hunting experience, one province reported that of 19,000 returns, 11,000 were from our six-state territory. This office has recently completed a data base containing hunting/fishing clubs and have these types of lists available.

#### **MEDIA**

While this territory is not a media center; it does have a number of very major outlets that the Consulate General works closely with, producing substantial results in terms of editorial coverage for Canadian travel.



### Major Publications

Better Homes & Gardens, published by Meredith Corporation in Des Moines, is by far the largest. Its circulation exceeds 30 million monthly. This office works closely with the magazine's Travel Editor and staff on development of stories on Canada. This year, for example, this resulted in a six-page story on Canadian cities, including color photography, with a publicity value of \$3.1 million.

Home & Away is published by AAA, based in Omaha, and has a circulation in excess of two million. It circulates to members of the auto club in ten states -- Minnesota, Iowa, Nebraska, North Dakota and South Dakota (all part of the Consulate's territory), plus Kentucky, Illinois, Indiana, Ohio and Oklahoma. This office has assisted the magazine's editor and staff on a number of articles, including an extensive piece recently on the Atlantic Provinces.

### Daily Newspapers

Many daily newspapers have travel sections or carry travel features frequently. The four major dailies in this territory, and their circulations, are:

Star Tribune (Twin Cities)	625,504
St. Paul Pioneer	247,492
Press Dispatch	
Des Moines Register	364,727
Omaha World-Herald	290,197

### Other media

There are a total of 113 daily newspapers within the territory, 1300 other publications (including weekly community newspapers and monthlies such as Mpls/St. Paul magazine), plus 750 radio and television stations.

Also based in the territory is In-Fisherman (circulation 283,000), which also publishes other outdoors publications, such as Angling Adventures. These internationally circulated publications have substantial interest in Canada. There are many other international, national, and local outdoor publications in the territory, including Waterfowl magazine. In addition, Babe Winkelman, host of the 90-station syndicated television show, "Good Fishing" and his production company are also based in Minnesota.

### Freelancers

Among the most productive efforts by this office is work with some twenty, very prolific freelance writers, photographers and television production companies. In the past year, in addition to many of the publications already mentioned, this has resulted in placement of copy on Canada in such publications as Skiing, Outdoor Life, Providence Sunday Journal, Boston Sunday Globe, Boston Herald, Portland Oregon and Green Bay Press-Gazette, among others, all based outside this territory. In addition, we are working closely with a freelance writer developing a new Canada guidebook under contract with Bantam Books in New York.

### How we assist

Assistance to travel and outdoor media offered by the Consulate can include one or more of the following: financial assistance to visit a Canadian destination for editorial research (Visit Canada Program); itinerary planning and arranging editorial contacts; research assistance; supply of photography from our library or assistance in procuring photography from sources in Canada; coordination with provincial and municipal media officers. etc.



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Tourism Personnel

John Kern, Consul & Trade Commissioner - Tourism, Program Manager; also responsible for cruise companies and liaison with United States Tour Operators Association.

Patricia Boyer, Commercial Officer - Tourism, Deputy Program Manager; also responsible for meetings, conventions and incentive travel.

Lois Gerber, Commercial Officer - Tourism, responsible for media (includes outdoor media).

Robert Littell, Commercial Officer - Tourism, responsible for travel wholesalers/operators and airlines.

Sandra Omand, Commercial Officer - Tourism, responsible for travel agents, outdoor product, auto clubs and senior citizens.

Zita Gabaldon, Secretary/Travel Counsellor - Tourism.

Fides Asistin, Secretary/Travel Counsellor - Tourism.

Territory - State of Connecticut, New Jersey, Southern New York (Albany, south to the New York border) and Bermuda

Population - 24 million (estimated)

The New York, New Jersey and Connecticut tri-state area plays a significant role in bi-lateral trade with Canada, accounting for over \$20 billion annually.

Population figures by State: New York (Consulate territory) - 12.9 million, New Jersey - 7.8 million, Connecticut - 3.3 million and Bermuda - approximately 58,000. New York City being the largest city in our territory, with a population of 7.1 million, is also the business and media capital of the United States.

Assistance Available from Post

Market intelligence, sales leads/referrals; counselling to travel industry; assistance in co-ordinating planned joint promotions/seminars and other activities in the territory; WIN Tourism Database; use of office facilities; newsletters to travel trade, media and MC&IT markets.

**CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN NY CONSULATE  
GENERAL TERRITORY**

Touring/City

The major tour wholesalers and operators headquartered in this territory continue to feature Canadian tour packages. They, however, are looking to expand their programs to new destinations or include unique components in their tour packages.

Senior citizens are an important element of these segments and will require programs specifically designed for their needs/tastes.

Development of Art & Cultural tourism related programs would offer the Canadian Industry increased sales opportunities in this market.

The Canadian Industry is well situated to penetrate these segments. However, it is important that suppliers be pro-active in this market. They must be willing to work with the U.S. Industry in providing them with competitive pricing and market intelligence on new products. Consideration should be given by the Canadian suppliers in making direct sales calls and participate in major travel shows held in this territory. (List of these shows available through the Consulate.)



### Outdoor/Adventure

Given the population base in this territory and the recent interest in Outdoor/Adventure products (including soft adventure packages), Canada has an excellent opportunity to penetrate these segments. The Canadian Industry should consider participating in the major Outdoor/Adventure shows that take place in this territory (list of shows available through the Consulate). They should also ensure that the U.S. Industry be kept apprised of new developments in the Canadian Tourism Plan and that product knowledge be expanded.

### Skiing

The ski destinations which hold the best potential from this market area are: Laurentians, Quebec City area, Eastern Townships, Canadian Rockies, Whistler, Blackcombe and the Interior of British Columbia. The various ski shows held within this territory offer excellent marketing vehicles (list of shows/marketplaces available through the Consulate).

### Meetings, Conventions and Incentive Travel

Canada is in an excellent position to attract meeting, convention and incentive travel business. This is due to Canada's proximity to this market, foreign appeal, diverse culture, clean and safe cities, friendliness. Additionally, our meeting/convention facilities and services are at or above par with competing destinations.

The economic growth in the U.S. has slowed with corporations facing the challenge of maintaining their financial position in the market place. Spending has been curtailed with alternative cost saving measures being examined. However U.S. business travellers to Canada in 1988 spent \$1.34 billion. Canada could have a further advantage here in that corporations who generally hold meeting outside the U.S. may be looking closer to home (North America) for meeting sites. Additionally, smaller and more frequent strategy meetings may be required by corporations to maintain their economic position in current market conditions. These meetings would be held in addition to the larger annual or board meetings.

An excellent opportunity for the Canadian Meetings Industry, to penetrate this market, is to consider participating in the major shows/marketplaces held within the territory (list of shows/marketplaces available through the Consulate).

## MARKET PROFILE AND PROMOTIONAL OPPORTUNITIES

### Travel Trade

#### Travel Trade Profile

There are over 500 tour wholesalers/operators located in our territory, of which approximately 250 actively sell Canada. In addition, there are over 4500 retail agents (approximately 40% sell Canada), 8 auto club organizations with a membership of approximately 2.2 million, 9 cruise companies, 16 on-line air carriers flying to Canada, one Canadian off-line carrier, one rail organization and one scheduled bus company.

#### Travel Trade/Promotional Opportunities/Challenges/Future Plans:

The New York Consulate General will undertake the following activities: continue to identify new leads and update profiles on major tour wholesalers/operators; operate, in co-operation with the Canadian Industry, VCP (Trade) programs and familiarization/product testing tours; assemble and disseminate market intelligence to the Canadian Industry as well as provide new product data to the U.S. travel market; develop, in cooperation with the Canadian Industry and major U.S. wholesalers/operators, a series of educational training seminars for Canadian product distributors.

The challenges Canada is facing include increases in marketing and advertising budgets of our competitors, perception of prices becoming too expensive and direct air access to major tourism destinations.

The Consulate will co-ordinate and participate in the following major shows/marketplaces in 1991 (further shows/marketplaces may be added at a later date):

February, March & May, 1991 - Senior Travel Planners Marketplaces in the States of New York, New Jersey and Connecticut

March 4 to 7, 1991 - Travel Marketplaces in the states of New York, New Jersey and Connecticut.

This office will also produce a newsletter which will reach 3,500 US travel influencers.



## Media

New York is the print and media center of the world. The majority of all major networks are headquartered in this territory. The travel media is composed of over 200 magazines devoted specifically to travel; 80 daily newspapers; 380 weekly publications; 265 radio and 150 TV stations; as well as hundreds of freelance writers/photographers (list of media contacts available through Consulate).

## Media - Promotional Opportunities/Challenges/Future Plans:

This office will undertake the following activities: continue to identify new contacts and update our media profiles; arrange, in co-operation with the Canadian Industry, VCP (Media) individual/group site inspection tours; assemble and disseminate market intelligence to the Canadian Industry; provide product knowledge to the U.S. media; develop and co-ordinate; in co-operation with the Canadian Industry, the New York Dateline Canada/Media Marketplace, as well as other targeted media promotions.

Our major media activity will be: Dateline Canada/Media Marketplace, March 5 & 6, 1990, New York City.

## Meetings, Conventions & Incentive Travel

### MC&IT Profile

The Association Market: Approximately 2,000 associations are located in the New York territory. Over the past several years associations have been relocating out of New York to New Jersey and Connecticut as well as a large percentage moving to Washington, D.C.

The Corporate Market: The New York territory, with some 450,000 corporations, continues to be the corporate center of the world. Over 200 of the Fortune 1000 are located within this territory. This, no doubt, represents the greatest market potential for Canada. Major industries include: banking, finance, communications and retailing. For New York corporate meeting planners, destination is the most important factor in the selection of a meeting site, followed by accessibility by air, cost, facilities and services.

The Incentive Market: According to the Society of Incentive Travel Executives, insurance companies are the top industry users of incentive travel. The largest concentration of insurance companies are in the Eastern Corridor. This could be a lucrative market for Canada since incentive trips are generally high yield business. There are 50 incentive planners/ organizations located within this territory.

MC&IT - Promotional Opportunities/Challenges/Future Plans:

The Consulate will undertake the following activities: continue to identify new contacts and update or MC&IT profiles; arrange, in co-operation with the Canadian Meetings Industry, individual and group site inspection tours; assemble and disseminate market intelligence and generate new leads for our Canadian colleagues; provide product knowledge to the U.S. MC&IT market; develop and co-ordinate major MC&IT promotions/marketplaces in the territory. They include:

February 20-21, 1991 - "We Love New York" Day, New York City  
June 13, 1990 - "Showcase Canada", New York City

Outdoor/Adventure

Over 220 outdoor/recreation clubs have already been identified as being located in this territory. The outdoor/adventure media in this market are also highly enthusiastic supporters of these segments.

The challenges Canada faces include: perception of Canada being too expensive, direct air access to major tourism destinations and increased advertising/marketing budgets of our competitors.

Outdoor/Adventure Future Plans/Promotional Opportunities

The Consulate will undertake the following activities: continue to identify new contacts and update our Outdoor/Adventure profiles; arrange, in co-operation with the Canadian Industry, VCP (Media)/VCP (Trade), familiarization tours; assemble and disseminate market intelligence to the Canadian Tourism Industry, as well as provide new product knowledge to the U.S. marketplace; develop, in co-operation with the Canadian Industry, a series of educational training seminars.

Challenges include: increased budgets of our competitors and perception of Canada becoming too expensive.



Ski

Ski Profile

50,000 skiers hold active membership in the various ski councils situated within our territory. In addition, over 100 major companies have ski clubs affiliated with their organizations.

The media is also a strong supporter of our skiing product.

Ski Promotional Opportunities/Challenges/Future Plans:

This office will undertake the following activities: continue to identify new contacts and update our ski profiles; arrange, in co-operation with the Canadian and U.S. Tourism Influencers, familiarization/product testing tours; disseminate market intelligence to our Canadian colleagues; provide the U.S. ski market with new Canadian product knowledge; develop, in co-operation with the Canadian Industry and U.S. ski influencers, a series of educational training programs.

The Challenges that face Canada are: perception of becoming too expensive, direct air access to major tourism destinations and increased promotional efforts by our competitors.

OTHER CANADIAN PROVINCIAL REPRESENTATION IN THE TERRITORY

Alberta  
Ontario  
Quebec  
Saskatchewan

FOREIGN GOVERNMENT TOURISM OFFICES LOCATED WITHIN THE TERRITORY

Over 60 foreign countries have tourism representatives located within the New York territory.

**CANADIAN CONSULATE GENERAL**

Tourism Division

50 Fremont Street, Suite 2100

San Francisco, California 94105

Phone: (415) 495-6021

Telex: 0034321 (DOMCAN SFO)

Fax: (415) 541-7708

Office Hours: 9:00 - 13:00 Pacific Time

14:00 - 17:00

Tourism Personnel

Mr. Al Lyons, Consul and Trade Commissioner

Mr. Jim Norwood, Commercial Officer (Travel Trade/Media)

Ms. Gay Wittenberg, Secretary

Territory

States and Population

Northern California	11,600	Nevada	1,054
Colorado	3,301	Utah	1,690
Hawaii	1,098	Wyoming	490

Total 19,233

quoted in (000) thousands, 1989 est., US Census

The territory comprises of a six state region which includes portions of the most populated and least populated states of the Union. The population of California alone is larger than the entire population of Canada. Today, California is recognized as the seventh largest economy in the world.



The region comprises of 11% of the land mass of the US and 8% of the population. The major metro centres of the territory include San Francisco/Oakland/San Jose, California, Denver, Colorado, Salt Lake City, Utah, Sacramento, California and Honolulu, Hawaii.

The economy of the region is derived from aerospace, and high technology (computer software and hardware manufacturing and biogenetics), agriculture, tourism, and gas and mineral exploration.

#### POST ASSISTANCE

This post can assist your organization with marketing intelligence, counselling to the travel trade, coordinate activities within the territory, sales leads and referrals, joint promotions and seminars.

#### CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN THE TERRITORY

##### Touring/City

Due to the mild climate of California retirees from across the nation flock to the Golden State armed with their household goods and a recreational vehicle. For many it is an opportunity to travel to leisure. Several tour operators in this territory have identified the seniors market as an affluent market to lure visitors to Canada. Over the past several years group leaders have become an important extensions to the tour sales office. Vehicular and escorted tour demands have increased in recent years to Canada due to seniors retiring to California and Colorado.

Over the past four years this office has made the commitment to develop the State of Hawaii travel market. Our demographics indicate that there is a strong potential for reasonable travel trade between Hawaii and western Canada for summer and winter programs. Several tour operators are doing quite well in providing ski packages to Whistler and the Canadian Rockies.

##### Outdoor/Adventure

There are several major outdoor sportshow held throughout the territory each year. One of the largest is the International Sportsman Exposition held each year in San Mateo, Sacramento and Denver. Attendance at this venue hovers near the 150,000 market. Canadian suppliers abound promoting their product and services to the potential American visitor.

### Skiing

Right at the back door of San Francisco and Denver are two major skiing destinations: the Sierra ski villages and the ski sports of the Colorado Rockies. Both of these destinations are strong competition to the ski slopes of Canada. Yet, within hours visitors from California or Colorado can be skiing at Whistler or the slopes in the Canadian Rockies. With accommodation rates on the rise in Colorado, Canadian destinations have become more affordable for those who are looking for a bargain.

### Meetings, Conventions and Incentive Travel

The San Francisco Bay area has long been described as the financial capital of the West. Many of the Fortune 500 companies have corporate headquarters in this region, many who look to travel outside the United States for meetings and conventions.

### Corporate and Association Markets

Our Meeting, Convention, and Incentive Travel data bank is updated periodically throughout the year. Currently we have profiles on approximately 400 organizations. Lists of qualified leads can be made available to qualified organizations in Canada.

### Incentive Travel Market

This region is not a major incentive travel headquarters city, although the major companies who work in this market have offices in San Francisco, San Jose, and Denver.

### TRAVEL TRADE

There are an estimate 4,000 retail travel agencies within our six state territory. In addition there are 95 Auto Clubs and approximately 35 secondary tour operators in the region.

The San Francisco Canadian Consulate General works closely with Tour Operators/Wholesalers, updating files (copies can be made available), new product/development mailings, Rendez-vous Canada participation and Visit Canada Program (Trade) site inspections/familiarization tours.

In addition we coordinate three major travel trade marketplaces in region. This information is located elsewhere in this profile under Tradeshows.



### Skiing

Skiing organizations in this territory is an elusive exercise. Colleges, universities and corporations all have ski clubs. Many of these organizations work from offices without telephones or addresses, yet we keep a list of the high profile clubs who are interested in international travel.

### Outdoor/Adventure

San Francisco is a cultural setting with few hunters and fishing devotees. Yet to in Colorado, Wyoming and Utah these people abound. The demographics for this region indicate that fresh and salt water fishing British Columbia is popular with visitors from all states in the region, hunters prefer Alberta, Manitoba, and Saskatchewan, canoeists travel to British Columbia, Manitoba and Ontario. These demographics significantly reflect the air corridors to Canada within the territory.

### Media

Over the last several years this office has identified a large number of free lance travel writers who periodically write about Canada.

### Major Publications

Sunset magazine, published by Lane Publications in Menlo Park, California is probably the best known publication in the territory. Their circulation of 1.7 million copies is distributed monthly throughout the 11 western States.

Motorland magazine, published by the California State Automobile Association has a circulation just under 2 million and is distributed throughout Northern California and Nevada. This office works closely with Motorland editorial staff to develop an ongoing supply of articles on Canada.

Assistance to travel and outdoor media offered by the Consulate can include one or more of the following: financial assistance to visit a Canadian destination for editorial research under the Visit Canada Program/Media; itinerary planning and arranging editorial contacts; research assistance; supply photography from our library or other sources in Canada, and coordination with provincial and municipal media officers.

**CANADIAN CONSULATE GENERAL  
TOURISM PROGRAMME**

412 Plaza 600 Building  
Sixth & Stewart  
Seattle, Washington 98101-1286

Phone: (206) 443-1777 (Consulate switchboard)  
(206) 443-0476 (travel trade line)  
(206) 443-1864 (Recorded consumer line)

Telex: 032-8762 (DOMCAN SEA)

Fax: (206) 443-1782

Consulate Hours of Business: 8:00 a.m. to 4:30 p.m. Pacific Time  
Monday to Friday

**Tourism Programme Personnel**

**Robert Brown** - Tourism Programme Manager

- Programme Manager overseeing all promotional activities undertaken within the travel trade, media and meetings, conventions and incentive travel sectors. Coordinates all federal/territorial and private sector liaison.

**Ken Erickson** - Tourism Marketing Officer - Travel Trade

- Responsible for travel trade development and promotion including airlines, cruise companies, rail, motorcoach, tour wholesalers, automobile clubs and retail travel agencies.



Jill Seidel - Tourism Marketing Officer - Meetings, Conventions & Incentive Travel

- Responsible for the development of the meetings, conventions and incentive travel market within the territory. Works with meeting planners, chief executive officers, associations, corporations and special interest groups to develop the MC&IT sector.

Hilda Cullen - Tourism Marketing Officer - Media

- Works with the print and electronic media to increase the exposure of Canada's tourism products. Coordinates special promotions and prepares a travel industry newsletter.

Position vacant - Tourism Administrative Assistant

- Provides administrative support to the Tourism Programme.

Territory - The Pacific Northwest states of Washington, Oregon, Idaho and Alaska

Population

Washington	4,419,000
Oregon	2,656,800
Idaho	1,017,100
Alaska	<u>523,700</u>
TOTAL	8,616,600

Most of the territory's population is concentrated along the I-5 corridor of Washington and Oregon west of the Cascade Mountains including the metropolitan areas of Seattle and Portland. This region has experienced a buoyant economy in recent years based on the aerospace and high-technology industries. The rest of the Post territory, including eastern Washington and Oregon, Idaho and Akaska, is quite sparsely populated and is dependent on natural resource based economies (logging, agriculture and oil) which have struggled in recent years.

## PARTNERS IN TOURISM

The essence of the promotional activities that the Tourism Programme undertakes is partnership. This partnership involves funds, personnel resources, materials and the sharing of timely market development intelligence with both the public and private sectors of the tourism industry.

Each of our Tourism staff members is familiar with the travel industry in the Pacific Northwest. They can assist in providing tourism market intelligence information, setting up appointments, identifying useful and appropriate travel trade shows, supplying lists and profiles of contacts in

the territory, and providing counselling on a variety of promotional activities which may be pursued by members of the Canadian tourism industry.

Site inspection visits and familiarization tours to Canadian destinations are frequently arranged to enable U.S. travel influencers to experience the Canadian tourism product first-hand. These visits are heavily dependent on the assistance of the Canadian public and private sectors to stretch scarce federal dollars and to achieve beneficial results for Canada.

The Consulate General co-sponsors a variety of activities in the states of Washington, Oregon, Idaho and Alaska. These promotions involve participation in trade shows, exhibitions, product launches, industry mailings, etc. Typically used promotional techniques may include such venues as receptions, seminars, breakfast meetings and sponsoring breakouts within a larger format.

Names and profiles of all our contacts in the Post territory have been inputted into the WIN Tourism data bank under the Travel Influencer, Media and MC&IT sectors. Our staff can supply computerized lists, which are being continually updated, to Canadian suppliers interested in this market. These lists include travel agencies, tour operators and wholesalers, automobile clubs, senior groups, ski clubs, freelance writers and photographers, newspapers, magazines, radio and television stations, meeting planners, and more.

Don't hesitate to contact any member of our staff for assistance. When in Seattle, we encourage Canadian tourism industry representatives to include the Consulate General in their sales calls. It is best, however, to arrange appointments in advance by calling (206) 443-1777. With advance notice, office space may even be available for use during the day to make local telephone calls, etc.



The Provinces of British Columbia and Alberta also have tourism representatives based in Seattle. Tourism British Columbia has maintained a sales and information officer here for a number of years catering to the Pacific Northwest market. Alberta Tourism opened an Alberta Media Services Centre in Seattle in 1988 to capitalize on the publicity generated by the 1988 Winter Olympics. This office is operated by the public relations firm, Ogilvy & Mather/West, and is responsible for media contacts throughout the U.S.

### **SECTOR PRODUCT DEVELOPMENT POTENTIAL**

#### **Travel Influencers**

The Seattle Post territory is home to about fifty tour wholesalers/operators including headquarters for several nationally-marketed tour companies that regularly feature Canadian itineraries - Holland America Line Westours, Princess Tours, Brennan Tours and Society Expeditions. Although most packages originating here are to Western Canada, there is a growing interest in developing new products to Eastern and Northern Canada. For example, Princess Tours developed two new eastern tours to Ontario/Quebec and to the Atlantic Provinces for 1989 and to the Atlantic Provinces for 1991. As well, there is considerable interest in "soft" outdoor adventure products available in all parts of Canada.

The Tourism Programme plays a major role in identifying new product opportunities in Canada and works in concert with Canadian ground handlers, hotels and attractions to stimulate the development of new packages by local tour operators, motorcoach companies, airlines and cruise companies.

Air connections to Canada from the territory have improved in the last few years. Air BC, Time Air and Horizon Air have all commenced or greatly expanded their services between Seattle (and Portland) and Vancouver and Victoria. Horizon Air also plans to begin Seattle-Calgary non-stop flights in 1990. Thai Airways International now flies non-stop between Seattle and Toronto six times a week. Continental Airlines has new non-stop flights between Spokane and Vancouver. A major drawback to developing more tourism packages to Eastern Canada, however, continues to be the relatively high cost of air travel across Canada.



There are approximately 1,100 retail travel agencies in the territory - 590 in Washington, 300 in Oregon, 150 in Alaska and 60 in Idaho. As elsewhere, there is an increasing trend towards mergers of agencies in order to obtain more clout with travel suppliers. There are also 47 AAA branch offices in the four state region with 610,000 members.

Major Tour Operators/Wholesalers in Territory:

- Holland America Westours; Princess Tours; Brennan Tours; Joseph Van Os Nature Tours; Gray Line of Seattle

On-Line Air Carriers From Territory to Canada:

- Air Canada/Air BC; Canadian Airlines International/Time Air; Horizon Air; United Airlines; Continental Airlines; Delta Airlines; Thai Airways International; Lake Union Air; Kenmore Air

Motorcoach Companies to Canada:

- Greyhound; Gray Line of Seattle; Empire Lines; Alaska Coachways

Cruise Companies:

- Holland America Line; Society Expeditions; Clipper Navigation; Washington State Ferries, Black Ball Ferries; Alaska Marine Highway System

Media

A very large number of travel writers and photographers live in the Pacific Northwest region. Our Media data bank currently lists 320 freelance writers, photographers, travel publications, fishing and outdoors publications, radio stations and television stations.

The office works closely with these media representatives to encourage wider coverage of Canada's tourism products. We will coordinate visits to selected regions and destinations in Canada (VCP Media programme) in cooperation with the provinces/territories and private sector.

In 1990, there were magazine and newspaper articles published, radio and television coverage aired which had a total of over \$2.2 million CDN in equivalent advertising value which can be directly attributed to our office's media efforts. Of course, the return on media visits to Canada that we have arranged will continue to grow considerably as more material is published or aired over the next couple of years.



Other assistance is given regularly to the media in the form of research assistance, providing Canadian contacts, itinerary assistance, supplying photographs from our photo library, and more.

Our office produces a quarterly Canada Tourism newsletter which is distributed to approximately 2,000 travel agencies, tour operators, media and meeting planners in the Pacific Northwest. Each issue of this newsletter highlights a specific Canadian travel theme of interest to the tourism industry. Past issues have included rail travel in Canada, boating in Canada, cultural tourism, vacations of the mind and body, and cross-country skiing. Upcoming issues are expected to feature golf in Canada, famous gardens of Canada and performing arts destinations. Each province/territory is solicited for input to this newsletter on a regular basis.

Media (numbers):

Radio Stations	370
TV Stations	45
Newspapers: Total	85
Metropolitan	8
Magazines: National	8
Regional	27
Freelance Writers/	
Photographers	170

Major Magazines Published in Territory:

- Alaska Airlines Magazine (in-flight); Northwest Airlines Compass Readings (in-flight); Bus Ride; Canoe Magazine; Trout Magazine; Flyfishing Magazine; Pacific Northwest Magazine;

Major Daily Newspapers in Territory:

- Seattle Times; Seattle Post-Intelligencer; The Oregonian (Portland); Spokane Spokesman-Review; Boise Idaho Statesman; Anchorage Daily News; Anchorage Times; Tacoma Morning News Tribune

### Meetings, Conventions and Incentive Travel

In 1989, Seattle and the Puget Sound area of Washington was ranked number 2 among major U.S. cities as a place to locate a business, according to a recent nationwide survey of top executives. More than 400 CEO's gave Seattle high marks for availability of skilled workers, governmental climate, access to international markets, quality of life and ability to attract executives and professionals. The area's growth industries are high-tech computers, software, advanced medical equipment and aeronautics and its related industries. As well, Seattle's position relative to the Pacific Rim is a growing factor in a buoyant economic profile for the MC&IT sector.

The entire territory has 3,070 registered associations, not including religious groups. There are 74 national trade and professional associations headquartered here. Also headquartered in the territory are 1,379 corporations with annual sales of over \$10 million U.S.

The MC&IT sector of the Consulate's Tourism Programme has generated \$7.5 million CDN in confirmed bookings for the first nine months of FY 89/90. That figure compares to \$5.2 million CDN for the entire FY 88/89 and \$1.3 million CDN for FY 87/88. It is estimated that in the medium term this sector could grow to annual sales bookings of \$10 million to \$14 million CDN.

Our MC&IT Data Bank currently has over 750 profiles on corporate and association contacts in the territory. Of these, more than 260 have been fully qualified as having an interest in meeting in Canada. New leads are regularly forwarded to the appropriate contacts in Canada for their follow-up.

Although this territory has few incentive travel specialty houses, incentive travel has been identified as an area of great potential in the corporate market. Our office hosted an incentive travel promotion, "The Great Canadian Getaway", in October 1989 and again in October 1990, featuring resort facilities which cater to this kind of market. Both suppliers and guests were very pleased with this promotion and it will be repeated again in 1991.



"Fortune 500" Companies Located in Territory:

- Boeing Co., Seattle, WA (#20)
- Weyerhaeuser, Tacoma, WA (#58)
- Boise Cascade, Boise ID (#113)
- Paccar, Bellevue, WA (#166)
- Louisans Pacific, Portland, OR (#198)
- Willamette Industries, Portland, OR (#239)
- Tektronix, Beaverton, OR (#249)
- Nerco, Portland, OR (#411)
- Longview Fibre, Longview, WA (#443)

**FUTURE PLANS/PROMOTIONAL OPPORTUNITIES**

The Tourism Programme anticipates maintaining current performance levels in the Meetings, Conventions and Incentive Travel sector. Electronic media coverage will continue to be a targeted area for growth and development to complement a well established print media base. New product development with wholesalers, airlines and motorcoach companies is the area receiving major emphasis during the

1990/91 fiscal year. New itineraries and destinations beyond the traditional urban market settings will be the outcome of the travel trade marketing thrust. The identification and packaging of the ever-expanding adventure travel product will continue.

**Selection of Major Upcoming Events**

- Jan 17-18/91 - Alaska Fly-Out , Anchorage
- Feb 5/91 - Alberta Outdoor Adventure Show, Seattle
- Feb 6-10/91 - International Sportsmen's Exposition, Seattle
- Feb 7-10/91 - International Sportsmen's Exposition, Eugene, OR
- Feb 19/91 - J&D Travel Marketplace, Portland
- Feb. 21/91 - J&D Travel Marketplace, Seattle
- Apr. ?/91 - W.S.A.E. Sites & Services Fair, Seattle
- Apr. 30 - Canada Media Marketplace, Los Angeles
- May 1/91
- Oct. ?/91 - Great Canadian Getaway, Seattle
- Oct. 22/91 - J&D Travel Marketplace, Portland
- Oct. 23/91 - J&D Travel Marketplace, Seattle



**CANADIAN EMBASSY  
TOURISM SECTION**  
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Personnel

Harry van der Veer, Commercial Counsellor (Section Head)

Christelle Naumann, Commercial Officer (Meetings, Conventions and Incentive Travel)

Frank LaFleche, Commercial Officer (Travel Trade)

Brigitte Boucher, Secretary/Administrative Assistant

Janissa Wagner, Secretary/Administrative Assistant

Territory Washington, D.C., Maryland, Virginia, Delaware and 32 counties on the eastern side of the State of Pennsylvania

Population

Eastern Pennsylvania	8,900,000
Virginia	5,870,000
Maryland	4,463,000
Delaware	633,000
Washington, D.C.	626,100

Total Population 20,429,100

MEETINGS/CONVENTIONS/INCENTIVE TRAVEL

Client Population

\* ASSOCIATIONS

NATIONAL	REGIONAL	TOTAL	STATE
35	171	206	Delaware
2925	131	3056	D.C.
674	700	1374	Maryland
837	1965	2802	Pennsylvania
1152	927	2079	Virginia

Incentive contacts: 42 in greater Washington

Database profiles: 1147 in greater Washington  
(832 can meet in Canada;  
235 cannot meet in Canada; and  
56 multi-management firms)

344 in greater Philadelphia  
(118 can meet in Canada;  
202 cannot meet in Canada; and  
24 multi-management firms)

There are up to 25,000 associations of a national scope in the U.S.A. or a total of 500,000 if state, regional and local associations are included.

The American Society of Association Executive's (ASAE) individual membership is more than 20,000, representing more than 8,000 national, state and local associations.



According to the Greater Washington Society of Associations Executives (GWSAE), Greater Washington is considered America's association center, with over 3,200 associations headquartered here, over 3,000 of which are major national or international associations.

Greater Washington represents 32% of the nation's share of associations and employs over 80,000 people.

Approximately 55% of the greater Washington area associations have budgets in excess of \$1 million and 15% have budgets of over \$5 million.

58% are located in the District of Columbia

28% are located in Virginia

14% are located in Maryland

\* Source: Gale Research - January 1, 1990

The Pennsylvania Society of Association Executives (PASAE) is a statewide organization headquartered in Harrisburg, PA. The Delaware Valley Society of Association Executives (DVSAE) serves the Delaware Valley area (Delaware, lower New Jersey and greater Philadelphia). Both organizations are allied with the American Society of Association Executive (ASAE).

#### The association and multi-management markets

The qualifications and re-qualification of associations and multi-management profiles within our territory is an on-going procedure. Our MC&IT databank is updated annually or on an ad hoc basis. "Canada's Call" are annual MC&IT marketplace/receptions hosted in conjunction with Canadian partners in the meetings and conventions industry.

#### The corporate and incentive travel market

The corporate and incentive travel segments in our market are currently being researched to identify the market potential. The majority of corporations are located in the states of Pennsylvania's Delaware.

We are presently preparing corporate profiles on the top 200 largest public companies in the Washington area, which will be available through a computer database in the near future.

Upcoming special MC&IT promotions

"Canada's Call" marketplace

November 5, 1990...Philadelphia

November 6 & 7, 1991...Washington, D.C.

This mission also collaborates on joint promotional activities initiated or proposed by Canadian provinces or municipalities in support of their individual marketing efforts.

The mission maintains an active site inspection program for decision makers to help close sales for convention site selection. Officers of the mission maintain professional memberships in relevant trade associations for the purpose of facilitating market access and flow of information beneficial to Canada's Convention industry.

City Tourist and Convention Bureau: 29

Canadian provincial representation in territory: The Provinces of Quebec and Alberta.

Canadian cities represented in territory: Ottawa, Toronto and Vancouver.

TRAVEL TRADE

Of the 1,600 retail travel agents in the Washington, D.C. territory, approximately 400 actively sell Canadian destinations.

Motorcoach tour operators/wholesalers

There are 95 motorcoach tour operators in our territory; approximately 20 of these are major producers of Canadian tours. Approximately 400 tours per year originate from our territory. We presently have profiles on 65 of these operators.

Ski market

There are some 80 identified ski clubs with a total membership of 100,000. The largest club is the Washington, D.C. club which has in excess of 6,000 members. The national Ski Tour Operators Assn. for the U.S. is located in our territory, Arlington, VA.



## CANADIAN PRODUCT DEVELOPMENT

### **Outdoor**

There are two major sportsmen shows in our area: Harrisburg, PA and Baltimore, MD. The dominant area of interest in the outdoor market is in the state of Pennsylvania, followed by Virginia, Delaware and the District of Columbia.

### **Touring**

Areas of Canada included in the 75% of the tours to Canada from our territory in order of volume are: Ontario, Quebec and Atlantic Canada. Shorter tours are selling better than long haul programs. There has been an increased interest at finding new activities at destinations, and new destinations within the standard provincial programs.

### **City/Culture**

Our motorcoach operators are finding a greater interest in city tours that combine the visit with cultural activities which their clients can participate in. They are also packaging shorter trips. Clients are looking at the same destination area visited before, but want a different site or theme as part of their trip.

### **Cruise Lines**

There are 24 cruise lines represented in our territory of which 4 include programs to Canada, notably Regency Cruises.

### **Air Carriers**

There are a total of five on-line carriers to Canada from our territory:

US Air to Toronto; Ottawa; Montreal; Eastern Airlines to Toronto; Montreal; Ottawa (To end of April 1991 only) Delta Air lines to Toronto; Lufthansa German Airlines to Montreal; and Air Toronto to Toronto.

Connections to other points of Canada are available on:

United Airlines to Vancouver, Toronto and Calgary;  
Delta Air Lines to Vancouver, Calgary and Edmonton;  
Northwest Airlines to Ottawa, Edmonton and Vancouver.

### **Rail Service**

Amtrak - 1 trip per day from Washington, D.C. to Montreal. Direct same train service "Montrealer"

- 1 trip via New York City "Adirondack" change of train in New York City.

### **Scheduled bus service**

Greyhound/Trailways to Montreal, Toronto, Ottawa and Vancouver

### **Foreign Government Tourist Boards:**

Bahamas Tourist Office, Washington, D.C.  
(Territory - Mid-Atlantic)

Mexican Government Tourist Office, Washington, D.C.  
(Territory - Mid Atlantic)

### **Motor clubs - AAA**

Total of 25 clubs in our territory with a membership of 2 million.

### **MEDIA**

Some fifty of the major media contacts in this territory provides coverage and exposure of tourism products, primarily through print, followed by local broadcast stations.

The following is a list of the major publications.

AAA World Magazine (Potomac Edition)	366,000 bi-monthly
The Baltimore Sun	1.2 million/Sunday edition
Changing Times	1.5 million/monthly
Destinations Magazine (American Bus Lines)	5,000/monthly



The Journal Newspapers	150,000/daily
Life in the Times	93,000/weekly
National Geographic Traveller	700,000/monthly
The Philadelphia Enquirer	1.0 million/Sunday edition
National Geographic Magazine	10.5 million/monthly
Richmond Times-Dispatch	260,000/Sunday edition
USA Today	1.7 million/daily
The Washingtonian	160,000/monthly
The Washington Post	1.2 million/Sunday edition
Washington Times	600,000/Sunday edition

Type of assistance provided by the Tourism Section of the Embassy:

- Trade contact lists;
- Co-funding joint promotion;
- Market intelligence;
- Logistical support;
- Association contact lists;
- Advise on local customs;
- Proposed Marketing plans; and
- Coordination of events.

Tokyo, Japan  
3-38 Akasaka 7-Chome  
Minato-Ku  
Tokyo 107, Japan

Post: Tokyo  
Territory Covered: Japan  
Post Contact: Guy Simser  
Phone Number: (81-3) 3479-5851  
Fax Number: (G-3 System) (81-3) 3470-7278

### **Major Opportunities and Challenges**

The strong yen, shorter work week, increased pressure for longer vacations, change in life-style, intensive promotional efforts of the travel industry among others continue to bolster overseas travel. As a result growth of Japanese visitor/revenue in host countries, especially in the Pacific basin, is climbing rapidly. The challenge is to get increased share against very tough and growing competition by other countries, states and national airlines.

### **Potential for Market Growth**

Projected overseas travellers from Japan: 1991 - 12.5 million. Canada arrivals: 1990 (Jan-Oct data only available) 425,000 up 1.8% as opposed to an average increase of nearly 12% for all destinations over the same period, consequently growth potential is indicated. Furthermore, a recent Japanese survey\* also ranks Canada as "a place one would like to visit", second only to Australia but ahead of Switzerland, Spain and New Zealand.

\* "On Japanese Overseas Air Travellers - 22nd Survey"

### **Strengths and Limitations Including Brief Competitive Analysis**

Canada has always enjoyed competitive advantages for beautiful nature/scenery, safety, friendliness but weakness as a destination of historical attractions, museums and art galleries, shopping. Recent trends in destinations include tours that combine the Rockies with Niagara Falls and Eastern Canada; Quebec City and Victoria are seeing more Japanese because of their old-city European appeal and because they are self-contained destinations. The "Anne of Green Gables" is one unique attraction that draws young ladies to Prince Edward Island and subsequently to other provinces in Atlantic Canada.



**Main Thrust of Program Emphasizing Priority Segments and Marketing Strategy**

A partner coordinated strategy aimed at off season travel (fall, winter, spring) when capacity and cost problems are reduced aimed at young female, silver age and skiers. FIT segment will be watched closely as a new growth segment potential.

**Key Partners Associated with Post Activities**

Provinces of Alberta, British Columbia, Ontario, Prince Edward Island, Quebec; Air Canada, Canadian Airlines International as well as a number of Japanese travel trade companies.

**List of Most Important Promotional Events Plus Location and Date**

World Travel Fair (Consumer): December, Even-numbered years, Tokyo  
JATA Congress & Trade Show: Late November, Odd-numbered years, Tokyo  
Tour Expo (Consumer): April, Annual, Osaka  
KANATA '91 (Trade): Fall 1991 (to be confirmed), Tokyo  
Various Travel Trade Seminars in local cities: September-March

**TOURISM PROGRAMME OF THE  
CANADIAN HIGH COMMISSION**

**STAFF**

**CANADIAN HIGH COMMISSION  
TOURISM PROGRAMME**

**Post Staff**

Counsellor and Tourism Attache: Pierre-Andre Cusson

Executive Assistant: Sheila Smith

Commercial Officers: Christopher King-Walker

Jill White

Jan Johnston

Jason Kee

Secretary: Caroline Fernandes

Travel Consultants: Alfred Briggs

John Bolton



## THE U.K. TRAVEL MARKET

### A/ INTRODUCTION

Any discussion of the U.K. travel market in 1990 and in the next decade will have to take into account the current economic situation in the U.K., whether due to the fiscal policies of the government in power, or international events. The current economic climate is casting a shadow over the travel industry. Demand for the traditional package holiday fell by 20% in 1989, primarily due to high interest rates. With higher travel costs predicted because of increased aviation fuel costs, the competition will be fierce to attract the fewer number of Britons for whom travel is an essential luxury.

### B/ THE ECONOMICS OF TRAVEL

The crisis in the Gulf has economists and politicians in a turmoil over the implications for the already fragile U.K. economy. In 1989-1990, the Thatcher government imposed high interest rates to counter inflation, and this appeared to be working. Consumers were spending less (retail sales declined to .9%), the housing market fell steeply and there has been a steep decline in imports due largely to a slowdown in domestic demand brought by continuing high interest rates (currently at 14.5%). The implementation of the poll tax or community charge, and pressure to keep wages within the inflation level are two further stresses on the economy. The government insisted that inflation would peak during the summer of 1990, and they were not wrong, with inflation topping 10.7% in August 1990. (Before the Gulf crisis, economist expected the inflation rate to peak in 1990, and then fall to 5% by the end of 1991).

But, the Gulf crisis has added a new dimension with a dramatic increase in oil prices and fears that inflation will remain high or perhaps rise further. The situation in the Gulf is predicted to send the economy into further turmoil as prices rise and wage pressure is intensified.



i/ The Economy's effect on Tourism

With 2/3 of the U.K. households as owner occupiers with mortgages, further rises in interest rates will result in persons choosing between perceived necessary leisure expenditures (such as the family holiday) and non-luxury items. Industry leaders maintain that the concept of a "holiday" is ingrained in the British psyche. Expectations may have to be altered, but holidays will still be taken.

While the basic level of personal disposable income has increased over time, retail prices, since 1982 have remained fairly stable thereby contributing towards a healthy climate for leisure expenditure. As well, because U.K. Tourism figures have traditionally been closely associated with exchange rates, the current strength of the U.K. pound may provide added impetus for consumers deciding to holiday abroad. Traditionally a strong national currency has resulted in increased demand for foreign holidays, even in times of slow economic growth. 1990-91 could be the exception as fuel costs dictate tour package cost increases which may offset any advantages offered by a strong Pound.

Before the Gulf crisis, when inflation was at the December 1988 level of 4.9%, the total value of U.K. consumer spending was 287.6 Billion Pounds. Of this amount leisure spending was estimated at 76.7 Billion Pounds accounting for 27% of the total. Spending on holidays abroad was worth 9.4 Billion Pounds or 13% of the total.

ii Britain's Entry into the Exchange Rate Mechanism (ERM) of the European Monetary System (EMS)

On Friday 5 October, Britain joined the Exchange Rate Mechanism of the European Monetary System. Immediately after the announcement, the value of the Pound soared, interest rates fell one percentage point to 14% and a new feeling of "guarded" optimism was felt in the City. This could have positive implications for the travel sector.

The main benefit of the ERM is to stabilise the member countries' currencies against inflation. Each currency is assigned a central rate against the others from which it is allowed to diverge within pre-set limits (in most cases 2.25%) of the central value. However, the Spanish Peseta and now Sterling are allowed a 6% fluctuation although they are expected to move into the narrower band eventually. If currencies start to fall to the bottom or rise to the top of this range, the central banks are mobilized to intervene in the currency markets. If that fails, the economic policy of that country's currency has to be changed, normally through a move in interest rates. British entry set



Sterling's rate against the German Mark at DM2.95, in a range that will fluctuate between DM3.13 and DM2.77.

As of January 1, 1991, the Pound was precariously moving up the ERM scale bringing with it hopes that there may soon be a drop in interest rates, which will increase consumer confidence and lead to increased travel sector spending.

### C/ DEMOGRAPHICS

The composition of the UK population will effect travel trends into the nineties. Travellers will be older, more experienced and will expect a higher quality product.

The population of the U.K. will increase from 56 million in 1990 to 59 million by 2001. Between the years of 1990-2001, the following age groups will grow substantially: the age group 5-14 will increase by 1 million to 8.1 million; 30-44 will increase over 2 million to 13.2 million; 45-59 will increase over 2 million from 9.2 to 11 million; 75-84 will slightly increase from 3 million to 3.2 million; and the over 85's will increase to 1.2 million from 800,000. The following groups will decline during the same period: those of the ages 15-29 will fall from 13.5 million to 10.8 million and there will be a slight decline among 60-64 year olds, from 3 million to 2.8 million.

What will these population trends mean for the composition of households in the U.K. in the next decade? It is predicted that there will be an increase in the number of U.K. households but a decrease in the average size of the household. The number of households is forecast to grow from 21.2 million in 1978 to 23.3 million in 2001 (much of this due to a rise in one-person households from 4.5 million in 1987 to 7.1 million in 2001. The average household size will decrease from 2.57 persons to 2.42 persons.

In terms of employment trends, the working population will continue to rise from 27.8 million in 1988 to 29.1 million by 2001 with unemployment to fall from the current level of 5.5% to 2.3-2.5% by the end of the century. There will also be an increase in the number of females in employment, many of whom will supplement the total household income available and improve opportunities for more leisure spending ( although they will still only contribute 1/4 of the total household income).



Those employed are now permitted more time for leisure activities. Between the years 1960 -87, the average number of days allowed for holidays doubled. By 1986 virtually all manual workers received 4-5 weeks holidays and non-manual workers received even more. In fact, with the attempt by industry to keep pay rises within inflation figures, increased holiday entitlement is now a main feature of many wage bargaining exercises.

These demographic data indicate that there will be more employed 30-59 year olds with a marginally higher level of disposable income and longer holiday entitlements. These factors indicate a healthy future for continued travel purchases.

#### D/ THE SIZE OF THE MARKET

The number of UK residents taking trips abroad in 1989 increased by 7% to the highest level ever achieved of 30.8 million. These travellers spent 9.3 Billion Pounds, an increase of 13% on the previous year. Traffic to North America was up by 20% but to the rest of Europe it was down by 1%. Some individual countries recorded huge increases in percentage terms, such as the U.S.A. (25%), France (29%), West Germany (29%) and Gibraltar/Malta/Cyprus (27%). Spain and Portugal were down by 10%, and Inclusive Tours as a whole were down 10%. (Source: British Tourist Authority)

A substantial fall in travel figures occurred in the fourth quarter of 1989, reflecting the economic squeeze in Britain for the IT traveller. However, the independent travel sector and business travel were buoyant and did not appear to have been affected by the economic climate in Britain. The BTA, through its International Passenger Survey has stated that British tourists are travelling to further destination countries, compared with the previous year. The latest monthly international passenger survey statistics (from April 1990), indicate that UK residents made 2.6 million visits abroad, 21% more than in April 1989. Visits to North America were up by 10% whilst visits to Western Europe and to long haul destinations were up by 23% and 11% respectively compared with April 1989. In the first four months of 1990, UK residents travelling abroad increased by 4% to 7.9 million. Visits to North America were up 3%. Average spending per visit of U.K. residents to North America increased by 12% to just over 600 Pounds, which was nearly twice the average spending of all visitors who travelled abroad. Average spending per visit to Europe increased by about 5%.

Two distinct travel trends are emerging in this time of economic uncertainty: people who traditionally took 2 or 3 holidays per year are foregoing these, or, the duration of the main holiday is reduced or replaced by two short breaks (most short breaks are taken in the U.K). In 1988 long holidays (over 4 nights in duration), accounted for 64% of the total consumer's long-haul expenditure while accounting for only 1/3 of all trips.



There is a strong correlation between socio-economic group and holiday taking. The AB socio-economic group takes at least 3 holidays per year. Short holidays attract more ABC1's as the second or third holiday in the year. The long-holiday market is dominated by lower socioeconomic groups and is the market sector most in decline.

The British still prefer to take their holidays in the summer, although there has been a slight decline in August holidays. From April to September, 72% of all 87 holidays were taken, but 90% of inclusive tour holidays abroad were taken during this period.

#### **E/ THE U.K. OUTBOUND MARKET**

Economic conditions, demographic changes, the increase in personal incomes, the change in the U.K. weather, and social habits and lifestyle changes of past 20 years has radically shifted the pattern of U.K. holidays. Since 1977 the number of Britons taking long holidays abroad has doubled, favouring European destinations. During 1988, 81% of all overseas holidays taken by British people were spent in Europe, with Spain and the Spanish Islands attracting the largest numbers, followed by Greece and the Greek Islands and France.

We have already mentioned the 10% decline in IT in 1989, after peaking in 1988. The package tour to traditional holiday destinations, once thought of as exotic, are now seen as cheap and tacky. This attitude, combined with the economic and political indicators mentioned earlier, are creating a crisis in the package industry sector. The inclusive tours share of the holiday market has remained unchanged despite big increases in the number of foreign holidays taken each year. In 1980 IT's accounted for 6 million of the 12 million holidays taken by Britons abroad. By 1988 this figure increased to over 12.5 million, while the total holidays taken by Britons abroad rose to 20.6 million.

As a result in the decline in interest for the traditional IT package, in February, 1989, operators reduced capacity instead of retaining full programmes and heavily discounting. Demand has shifted away from hotel based holidays towards greater freedom in the choice of accommodation, location and activities. Both Spain and Greece are experiencing a drop in the number of U.K. visitors as their basic IT product has not developed and kept pace with the changes in holiday taking. Operators themselves are now diversifying to keep updated, by offering more self-catering, or camping holidays in Europe or North America.



Long-haul travel will be the prime beneficiary from changes occurring in U.K. holiday patterns. Before the Gulf crisis, a growth rate of up to 20% per year was predicted from 1989 to 1995 because of the following factors: the decline in growth of demand for traditional short-haul IT packages; the greater volume and variety of long-haul packages from the leading tour operators at competitive price, and; the change in leisure lifestyle resulting in increased consumer awareness and interest in long-haul.

Currently long-haul accounts for 1.5 million holidays. By 1993 this could rise to 2 million, with the main growth areas being the Pacific Basin/Australia and Asia. Growth will come from mainly long-haul IT's which are predicted to grow from 400,000 in 1988 to 800,000 in 1993. Long-haul will continue and become increasingly competitive among operators, with more opportunities to promote quality of service.

In the short term (1990-91) overseas holiday takings will be depressed, largely as a result of domestic economic pressures. It is estimated that recent mortgage rate rises will suppress demand for overseas holiday takings by 2 million holidays. General trends point to more independently arranged travel. The growth of sectors, such as time-share, overseas second-home ownership, self catering and the seats only market reflect the trend. The seats only market has steadily grown 15% a year since 1984, and is forecasted to rise to 5.1 million seats by 1993 (compared with annual increase of 10% for IT).

#### F/ THE UK TRAVEL INDUSTRY

The U.K. travel industry paper Travel News recently (August 30, 1990) reviewed the structure of the UK. travel industry, in light of recent economic conditions. Airlines are experiencing significant falls in profit and share price as the economic recession becomes worldwide in its effect. Less travel also means downgrading from business to economy. As a result KLM has reported an 82% drop in profits for the quarter to June. Swissair a 67% drop and British Airways shares fell more than 25% during the month of August. Charters are already suffering with Britannia forecasting further falls in profit and Dan-Air selling aircraft.

Tour operators are experiencing falls in traffic and car hire companies, unable to sell their used cars at inflation-proof high values are forecasting falling profits. Leisure shares on the UK stock market are more than 20% down since the beginning of the year.

There are, however, some areas of growth and profit. The Far East, and some middle-range hotel groups are benefiting from trading down.



Travel News is cynical about the current state of the market. Many of today's problems were caused by a decade of overcapacity, largely sustained by unrealistic assessments of real market growth. The Thatcher government then threw down the barriers and more investment was encouraged. Travel News writes:

People with no qualifications became airline owners overnight. Hotels were bought and sold at prices that could be recovered only if they were knocked down and rebuilt as tall office blocks. Companies that rented televisions "expanded" into tour operating, banks became travel agents, car hire companies were owned by companies that knew only factories before.

Many of those who rushed in at the beginning of the 80's, couldn't wait to get out by the slow down in the later part of the decade. The travel industry was soon consolidated and run by fewer people, and grew, more as a result of natural controlled development than an explosive increase in demand. A few well-managed companies have emerged to take the lead. Travel News predicts that the same players will be leading the industry throughout the decade, and that new entrants are unlikely.

#### i/ Tour Operators

Recent press reports have stated that even the top tour operators just managed to break even during the summer of 1990. The number of operator failures more than doubled from 9 to 21 in 1989/90, according to the Civil Aviation Authority's travel Trust Committee's annual report. The main 30 operators which provide 82% of licensed holidays had marginal turnover growth up from 3 Billion Pounds to 3.05 Billion Pounds (compared to a profit of 15.5 Billion Pounds in 1988). With passenger volume down 20% in 1989, the prospects are not encouraging in the short term.

Tour operators registrations for Air Travel Organisers Licenses (ATOL's) from October 31, 1989 to October 30, 1990 has indicated a reduction in capacity from the 14.2 million air seats in 1988-89 to 11.5 million, a decrease of 19%. This figure is not as negative for tour operators as it might appear. Holiday prices have increased by 10%, and tour operators generally achieve only a proportion of total capacity 94.5%.

There are approximately 650 ABTA registered tour operators in the U.K. Most are small, low volume operators. Of the total number of 650 operators, approximately 125 offer Canadian programmes. The market is dominated by the top five whose sales account for 2/3 of registered capacity: Thomson Group, ILG, Redwing, Owners Abroad Group and Airtours. The top 10 operators have 3/4 of all foreign holiday charter capacity.



Thomson Tour Operators is still the market leader having increased market share from 33% in 1988 to 38% in 1989. Thomson's interests incorporate Thomson Holidays, Skytours and Portland Holidays in addition to the Horizon, Wings and HCI and OSL names acquired in 1988. Thomson was badly hit in 1989 by the government's anti-inflation policies (maintaining high interest rates). Operating profits were down from 3.4 Million Pounds in 1988 to a loss of 15.9 Million Pounds in 1989. To counter this, the firm moved out of London, reduced its network of regional booking centres and laid off over 300 staff. Ironically, during this period of adjustment, Thomson strengthened its long-haul programme by launching new Florida Fun, Caribbean Carnival and Discover Turkey programmes.

Other leaders in this sector are ILG, who retained their 19% of market share in 1989, and Owners Abroad has moved into third place with a 14.5 % of the market. Well below this spot is the fourth company, Airtours with a 6% market share.

The long haul specialists, such as Kuoni, BA Poundstretcher, Speedbird, Jetsave, Hayes & Jarvis and Bales do control most of the market. In 1989, their profits were as follows:

Million Pounds = m

	Gross turnover	Profit	Holidays sold
Kuoni	140m	15.5m	136,407
Poundstretcher	70m	n/a	125,000
Jetset	40m	.75m	38,000
Speedbird	37.6m	n/a	32,464
Jetsave	27.6m	2.0m	52,000
Hayes & Jarvis	22.4m	1.1m	36,000
Bales	8.3m	1.7m	10,000

A glance at Kuoni's 15.4 Million Pound profit on turnover of 140 Million Pounds explains why so many of the big outbound names are turning to long-haul.

## ii/ Travel Agents

There are currently 7000 travel agents registered with ABTA. Of these, 2000 actively sell Canada. However, large multiple travel agencies now dominate the smaller agents. The 5 top multiples accounted for 44% of all overseas IT bookings in 1988 (compared with 38% in 1987).



Lunn Poly, Thomson's retail division, tops the list with more than 500 outlets with publicly audited pre-tax profits of 4.1 Million Pounds in 1989. It is closely followed by Thomas Cook, a Midland Bank subsidiary, whose travel interests spread from retail, business and tour operating interests, foreign exchange and travellers cheque facilities. Thomas Cook claims a 9 Million Pound profit (but it has not been audited). Pickfords Travel, number three, was seriously affected by the slump in Mediterranean holidays. In 1989 it recorded an operating loss of 3.5 Million Pounds compared with a 3.7 Million Pound profit in 1988. The top five UK travel agency groups in 1989 were as follows:

	Turnover	Profit	Market Share	Outlets
Lunn Poly	61.2m	4.1m	21%	505
Thomas Cook	21.50m	9.0m	10	566
Pickfords	70.6	(3.5)m	7	383
A.T. Mays	361m	2.6m	5	316
Hogg Robinson	55.7m	2.3m	4	200

The ambitions of the multiples will lead to overexpansion within the next five years. It is predicted that up to 10% of the 7000 travel agencies will go out of business as a result of competitive pressure and low profit margins. The press is capitalising on this doom and gloom, reporting that agencies are collapsing weekly.

The latest agency to be faced with closure was Exchange Travel Agency Ltd. With 129 agencies, the company, although asset rich, was cash poor, facing in the region of 22 Million Pounds in debts. The company blamed its poor performance on high interest rates and not on any noticeable drop in business: turnover had increased by 20% and approximately 300,000 trips had been booked through the company. A number of travel companies (notably A.T. Mays) were said to be interested in purchasing parts of the business, with no press announcements made as of Wednesday, 2 October, 1990.

One key to survival for all agents will be their ability to manipulate and develop reservations systems, such as Galileo, Amadeus, Istel and Fastrak. Further trends will include the development of trans-national and global travel agency networks. A pan-European network already exists with the Belgian group Wagon-Lits. As well, the recent acquisition of Mark Allen Travel (U.K.) by the U.S. agency Life Co., is the beginning of the establishment of global agency networks.



## G/ THE EFFECTS OF THE GULF CRISIS

The most predictable result of the crisis in the Gulf is the increased price of aviation fuel. This will have an effect in total tour packages. As of September 1990, some of the leading tour operators, Thomson, Intasun and Cosmos, are guaranteeing to keep price increases at bay until the New Year. However, the second editions of their 1991 brochures may well reflect new price increases.

Other situations may occur: U.K. charter companies may have to cut back on service as higher costs put them beyond the reach of the charter customer. In the UK, both Dan Air and Air Europe are looking for outside investors to keep their companies afloat, but they are not meeting with success. The British Air Transport Association predicts a 25% rise in aviation costs and according to the Association of European Airlines, scheduled airlines may also be faced with hard times ahead.

Many previously "safe" destinations such as Egypt or Turkey are affected and will no longer be considered such.

## H/ MARKET OPPORTUNITIES IN THE 1990'S

The two most significant events in the next few years to affect tourism, will be Europe 1992 and the opening of the Channel Tunnel in 1993. For the larger operators a united Europe will make it easier to expand their operations beyond the U.K.

But in terms of their day-to-day business, the EC is planning to implement new regulations which could affect their profitability. The EC plans to limit tour operators's ability to impose surcharges on price increases, juggle with departure dates, flights, or accommodation fees. This, claim U.K. operators will raise the costs of the holidays.

Travel agents, who are already under pressure from low profit margins and high competition, will be faced with additional EC legislation which will make them responsible for any shortcomings in package holidays.

### i/ Impact of Europe 1992

One of the problems in assessing the impact of 1992 lies in the lack of detail of the amendments made to date and their implications for the travel market now and at the time of the creation of the single market. Just over 100 of the 300 pieces of legislation were completed by mid-1989 and to date the legislation measures raise more questions than provide solutions.



The package of measures will affect prospects for airlines, tour operators, agents, hotels and car rental companies.

Airlines will face continuous pressure from the introduction of a Value Added Tax on both airfares and holidays, the abolition of duty free shops and the urgent need to improve airport infrastructure, including air traffic control. Air traffic congestion will be a major problem by 1992.

A Europe without borders will also have major implications for customs, immigration and the security infrastructure. New bilateral agreements will be needed between EC and non-EC countries.

One real problem lies with the relationships between the 12 EC countries and Norway, Sweden, Austria and Switzerland. The imposition of VAT on scheduled intra-European air fares and package holidays could distort prices for air travel from EC cities to non-EC points close to community borders. For example, travel from London to Munich would have VAT imposed, but not London to Zurich, despite their proximity.

For the U.K., there is slight optimism that it will benefit from a single European market. The tour operator sector is strong and, despite ILG's failure to establish a presence in West Germany, U.K. operators will be looking closely at prospects for European expansion.

#### ii/ The Impact of the Channel Tunnel

The Channel Tunnel will become the most significant European travel development of the 1990's. It will link travel opportunities and have profound cultural impact. Currently the ratio of cross-Channel traffic between U.K. residents and other nationals is 70:30. This imbalance will, as a result of the Channel Tunnel, become reduced as transportation links are improved in both the U.K. and mainland Europe. For example, by using the Channel Tunnel the following cities will be accessible:

London - Paris	3 hrs
London - Brussels	2 hr. 40 mins.
London - Lyon	5 hrs 15 mins.
London- Amsterdam	5 hrs 50 mins.

The prime users will be the leisure market (as air travel attracts the lion's share of business travel). Ferry companies are already restructuring their operations in response to the threat. It is estimated that by 1993, 15-16 million travellers will pass through the Tunnel (1/2 rail traffic and 1/2 coach/car traffic) which would directly impact on the ferry companies. They are now



capitalising on the perceived fear of the tunnel as dangerous and unsafe, with little opportunity for survival should a major incident occur. As well, for a segment of the leisure market, the ferry journey is an eagerly anticipated part of the trip, and not just the means of transport from point A to point B.

The low-cost U.K. scheduled air operators will also be affected by the Channel Tunnel. Air Europe, Air U.K., and British Midland all have ambitions to extend their European scheduled air network. They are likely to offer discounted lower cost fares with special reductions of 10-15% aimed at the leisure market (but will contain travel restrictions to retain the lucrative business traveller).

## I/ OUTLOOK FOR TRAVEL TO CANADA

Despite the doom and gloom facing the travel industry in the U.K., travel to long-haul destinations should not be adversely affected. Travel to Canada is attracting higher income earners, or those with few long-term financial commitments (over 55's).

The downturn in the economy and the threat of war in the Gulf will increase air travel costs in the short term. However, travel is considered a necessary expenditure and Canada will benefit from this perception. Travel numbers may be slightly affected should ABC1 travellers choose two or three shorter duration trips to one long trip. However, all indicators point to the U.K. consumer looking further afield for a quality and sophisticated product.

The prospects for the industry do contain optimism. The latest results among 73 operators and 154 agents surveyed by Travel Trade Gazette shows that not only is current trading doing well but that prospects for the future seem rosy. Nearly 2/3 of people questioned reported an increase in revenue for April-June over the same time last year. There is still concern over the economy, but their confidence is being boosted by better than expected results.

Those polled confirmed that:

- interest in Spain was declining further, with less than a third reporting a good performance;
- France is the top performer for multiples whereas the Far East came out on top with independents followed by North America and Australia;
- interest in Eastern Europe has considerably fallen (10%) with less than 1/3 expecting it to sell well;



- upmarket short-haul destinations are booming, with 73% say they are doing well, and;
- long-haul is not doing as well as it was in March, although it is still a buoyant market. Bookings are down between eight and 12% but more than 70% of the trade say that Australia, North America and the Far East are performing well.

The survey concluded that the trend away from package holidays shows no sign of slowing down.

Long-haul destinations can be cautiously optimistic about the future, even in times of economic uncertainty. Even the threat of the Channel Tunnel and a united Europe will not deter the upmarket traveller from visiting a quality, long-haul destination.

At a recent conference held on Marketing Travel in the Nineties, the top industry leaders also expressed cautious optimism. The doom and gloom for the travel industry that has been predicted in the media was reflected by only one speaker at this conference, a journalist. Most felt that the next year would be a trying time for the industry, but all expected a pick up in the economy by the end of 1991 which will be reflected in increased tourism sales. All agreed that a shift in the pattern of travel has occurred in the U.K. and that the greatest opportunities lie in offering a quality product which responds to new customer demand, and exceeds expectations in terms of the product and customer service. The traveller of the nineties will be older, more discerning, and more experienced. This will be reflected in his/her choice of destination.

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Personnel

M. Louis Poisson - Conseiller Commercial - Tourisme

Responsable du programme tourisme ainsi que de la publicité et des relations media.

Danielle Cordisco - Attachée au Service Commercial - Tourisme

Chargée des relations avec l'industrie touristique et du développement du marché et des produits.

Alyre Jomphe - Attaché au Service Commercial - Tourisme

Chargé des salons et de la promotion.

Agnès Raquet - Conseillère Touristique

Chargée des relations avec le grand public.

Raquel Driesch - Assistante de Direction

Territoire: France

Population: 55 510 000

En 1989 la France arrivait en sixième rang des partenaires commerciaux du Canada, après les Etats-Unis, le Japon, le Royaume-Uni, l'Allemagne et la Corée du Sud. Cependant, suite à un arrêt temporaire dans la livraison d'Airbus au Canada, la valeur totale du commerce bilatéral a diminué de 19% par rapport à l'année précédente et s'est située à 3,3 milliards de dollars.

Les exportations vers la France ont augmenté de 4% et se sont chiffrées à 1,3 milliards de dollars. La France se place maintenant au huitième rang de nos marchés d'exportations.

Caractéristiques du marché

En 1990, près de 280 000 touristes français ont visité le Canada. Les résultats de cette année représentent une croissance de plus de 5% sur les résultats de l'année précédente et positionne la France au quatrième rang de nos marchés étrangers après les Etats-Unis, la Grande Bretagne et le Japon.



Les trois tableaux suivants résument les principales caractéristiques de ce marché.

### Activités hivernales

Pendant l'hiver 89/90, 7,1% des français sont partis à la neige. Les séjours 89/90 à l'étranger ont représenté 15% des séjours de l'hiver. Durant cette période, 38 470 français ont visité le Canada. 12,29% de plus qu'en 87; 200% de plus qu'en 85.

Si en 85 aucun voyageur ne programmait l'hiver au Canada, pour 90/91, 28 voyageurs proposent près d'une centaine de forfaits pour découvrir les activités hivernales du Canada: ski, motoneige, traineau à chien, pêche sous le glace, carnivals.

La presse demeure un rouage essentiel pour développer le produit "activités hivernales".

### Plans futurs: projets de promotions sur les activités hivernales

Ce bureau entreprendra les activités suivantes:

- continuer d'identifier de nouveaux voyageurs et développer les programmes existants;
- organiser des voyages de familiarisation pour la presse et les voyageurs;
- fournir l'information sur ce marché à l'industrie touristique canadienne

### Autres représentations provinciales sur le territoire

- Québec
- Ontario

### Offices de tourisme étrangers sur le territoire

62 pays étrangers ont une représentation touristique à Paris.

### Segmentation du marché français

Afin d'en arriver à une combinaison appropriée des différents groupes de voyageurs, le marché français du tourisme a été divisé en segments. Cette division a été faite sous trois perspectives différentes, soit les produits, l'attitude et les buts recherchés.

La segmentation selon les produits a permis de distinguer quatre groupes de touristes offrant un potentiel intéressant pour le Canada.



Les voyageurs du segment plein air (16% de l'ensemble du marché soit 950 000 voyageurs) s'intéressent aux activités de plein air comme la marche et l'escalade, les terrains de camping et les parcs de caravanage ainsi que les grands espaces où ils peuvent s'isoler des foules. Ils font également attention à leur argent et cherchent un logement bon marché et des voyages peu coûteux d'une façon générale.

Les voyageurs du segment sports et divertissements (19% de l'ensemble du marché soit 1 100 000 voyageurs) aiment des sports comme la chasse et la pêche, le ski, le golf, le tennis, les sports nautiques. Par ailleurs, ils aiment assister à des manifestations sportives ou se divertir en fréquentant des casinos et des salles de jeux, en participant à la vie nocturne et en visitant des parcs d'attractions et des parcs thématiques. Il arrive que les intérêts des personnes de ce groupe soient passablement différents du fait de leur propension à opter non seulement pour les sports mais aussi pour les divertissements. D'une part, ce groupe s'intéresse parfois aux terrains de camping et aux parcs de caravanage ainsi qu'aux centres de villégiature. D'autre part, il s'intéresse parfois aux hôtels de première classe et aux grandes villes modernes.

Les voyageurs du segment culture et nature (13% de l'ensemble du marché soit 750 000 voyageurs) s'intéressent aux attributs d'ordre culturel comme les sites et les édifices historiques et archéologiques, les vieilles villes historiques, les musées et les galeries d'art, l'artisanat local, les villes et villages intéressants, les festivals locaux, et ainsi de suite. Ils s'intéressent également aux groupes culturels autochtones, aux groupes culturels d'immigrants ainsi qu'à des cultures différentes de la leur. Par ailleurs, ces voyageurs recherchent plusieurs attributs reliés à la nature comme la faune et les oiseaux, les parcs nationaux et les forêts, les lacs et les cours d'eau, les étendues sauvages et la nature vierge, etc.

Les voyageurs de la catégorie culture et confort (18% de l'ensemble du marché soit 1 062 000 voyageurs) recherchent les attributs d'ordre culturel comme les musées et les galeries d'art, les sites et les édifices historiques et archéologiques, le théâtre et les concerts ainsi que les vieilles villes historiques. Ils accordent également une grande importance à leur confort et recherchent des hôtels de première classe, des normes d'hygiène et de propreté, de grands restaurants et la sécurité personnelle. Ces voyageurs s'intéressent à diverses petites excursions guidées, de préférence dans une ville pas trop grande afin d'être en mesure de tout voir.



### Lignes directrices de la promotion

Notre programme de promotions à l'industrie est orienté en fonction de trois axes majeurs.

Dans un premier temps, nous jugeons prioritaire le renouvellement constant de l'offre touristique canadienne en France. L'initiative majeure dans ce sens et qui en est déjà à sa quatrième édition annuelle est Atelier Canada. Ce salon est organisé à Paris chaque année en début décembre et consiste en un workshop professionnel associant plus de 120 prestataires canadiens et quelques 500 tour opérateurs voyagistes français.

Le deuxième axe de nos activités consiste à informer le réseau des détaillants français. La priorité est donnée à une meilleure connaissance des destinations canadiennes et de la gamme de produits disponibles sur le marché français. Depuis octobre 1990, quatre séries de démarchages auprès de 700 agences de voyages de province ont été entreprises. Cette activité se poursuivra jusqu'en avril 1991. Dans ce secteur, une nouvelle initiative nous conduira à organiser, pour décembre 1991 une école de formation pour agents de voyages. Ceci nous permettra de jeter les bases d'un réseau de revendeurs informés et motivés sur le Canada.

Un troisième champ d'activités prioritaire consiste à informer la clientèle et l'industrie sur la destination et les produits offerts. A cet égard, notre programme de visites de presse est particulièrement important en France et complémente bien nos campagnes de publicité professionnelle et grand public. Pour le printemps 91, nous étudions aussi la possibilité de créer un service d'information par FAX à l'intention de nos principaux contacts. Les prestataires canadiens pourront y participer moyennant contribution.

### Programme de presse

Media: Dans le cadre de nos activités de relations presse, nous prévoyons organiser plus d'une vingtaine de voyages de presse (dont trois de groupe), avec les représentants des publications les plus fréquemment lues par les trois principaux segments-cibles identifiés par notre étude de segmentation.

Ces voyages seront élaborés "à la carte" en fonction des intérêts de chaque journaliste et en fonction des éléments que nous souhaitons promouvoir.

Ils se feront au Québec, en Ontario, dans les provinces Atlantiques, mais aussi dans l'Ouest où nous souhaitons vivement concentrer nos efforts en raison d'une très nette demande du marché français. Ainsi, outre le Manitoba et le Yukon qui sont à notre programme VCP Media, les provinces de l'Alberta et de la Colombie Britannique seront particulièrement à l'honneur cette année.



Un certain nombre d'activités en promotions spéciales telles que les salons touristiques, entre autres, sont également l'occasion pour nous d'y associer la presse.

Ainsi, Top Resa/Deauville, salon réservé uniquement aux professionnels du tourisme et auquel nous participons chaque année, nous permet de rencontrer les media, de leur parler du Canada et de leur annoncer la tenue d'Atelier Canada.

Atelier Canada/Paris: chaque année nous invitons la presse touristique, aussi bien professionnelle que grand public à venir rencontrer les exposants canadiens.

Cette année, ils furent 49 à nous rendre visite et purent ainsi découvrir les nouveaux produits offerts par les professionnels canadiens.

Parmi les salons touristiques grand public, où là aussi nous est donnée l'opportunité de rencontrer les media, citons le Salon Mondial du Tourisme et des Voyages à Paris, et le Salon Mahana à Lyon qui nous permet d'entretenir des relations avec la presse régionale.

Enfin, depuis deux ans, l'Association des Offices nationaux du tourisme et l'Association professionnelle des Journalistes du Tourisme (APJT), organisent un workshop d'une journée. Les journalistes aussi bien de Paris que de province font le déplacement.

Cette deuxième édition fut encore un grand succès pour le Canada puisqu'une trentaine d'entre eux se sont arrêtés pour discuter, former ou confirmer des projets de voyages et pour demander de la documentation.

#### Potentiel pour de nouveaux produits

Le Québec et l'Ontario sont les principales destinations programmées en France par la majorité des tour opérateurs. Par contre, on a noté récemment une croissance substantielle de l'offre de produits sur l'Alberta et la Colombie Britannique. Ce développement suit de près l'intérêt de la clientèle française pour ces nouvelles destinations haut de gamme. Avec un transport aérien plus accessible et la récente introduction de charters, l'Ouest canadien devrait enregistrer une croissance substantielle des visiteurs français dès la saison 1991. Les prestataires de l'Ouest canadien devraient déjà se positionner sur le marché français.

Les destinations Nord de même que le produit d'aventure douce exercent un attrait très fort en France. Les opérateurs français sont particulièrement intéressés à toutes nouvelles propositions qui leur permettraient de se démarquer de la compétition. Les activités peu ou pas exploitées en France sont les suivantes: culture, divertissements urbains, sports d'hiver et d'été, observation de la faune.



Terre-Neuve et les provinces de l'Atlantique (Acadie) sont aussi des destinations peu exploitées en France. Un potentiel intéressant existe sur ce marché mais il ne se matérialisera que si il est développé en parallèle à une meilleure information sur le produit.

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Mr. Jacques Poirier, Trade Development Officer - Deputy Program Manager  
Responsible for overall direction of Post's operational planning, program implementation and Post administration, staff direction and training, program coordination with Canadian and local partners, direction of outside agencies, and representation of Post's interests.

Mr. Jacques Poirier, Trade Development Officer - Deputy Program Manager  
Responsible for preparation of Post's planning and supervising implementation of Post's promotional activities, maintaining Post's market intelligence base, primary contact with trade bodies and Canadian partners at operational level, and providing support and advice to Post's promotional activities. Includes: liaison and guidance for Canadian suppliers and including liaison and guidance for Canadian suppliers and wholesalers; trade in FRG, planning and participation in Post's major promotional activities; supervision of Post's information services for trade and public relations; and providing need for all promotional information materials.

Mr. Jacques Poirier, Trade Development Officer - Deputy Program Manager  
Responsible for responding to the public and trade requirements on all travel-related matters, maintaining specific data base, identifying and suggesting related concerns and trade trends, and providing ongoing information and advice to Post's promotional activities.

Tourism Canada  
Taunusstr. 52-60  
6000 Frankfurt a. M. 1

Phone: (69) 23 03 74  
Telex: 4175874  
(cana d frankfurt)  
Fax: (69) 23 57 72

P O S T P R O F I L E

Post Staff:

Mr. André Pascal, Trade Commissioner: Cda-based

Responsible for overall direction of Post's operational planning, program implementation and Post administration, staff direction and training, program coordination with Canadian and local partners, direction of outside contracted agencies, HOP representational responsibilities.

Ms. Gabriela Pollak, Commercial Officer - Deputy Program Manager:

LES

Responsible for preparation of Post's planning, supervising implementation of Post's promotional activities, maintaining Post's market intelligence base, primary contact point for trade, media and Canadian partners at operational level.

Mr. Frank Jüttner, Commercial Officer - Marketing: LES

Responsible for compilation and assessment of product base, including liaison and guidance for Canadian suppliers and wholesale/retail trade in FRG, planning and participation in Post's major promotional activities, supervision of Post's information services for trade and public, maintenance, updating and assessing need for all promotional/information materials.

Ms. Helga Mellin, Commercial Officer - Information: LES

Responsible for responding to the public and trade requirements on all travel-related matters, maintaining specific data base, identifying and assessing related consumer and trade trends, assisting marketing officer in planning and implementing major trade/consumer fairs, maintenance of up-to-date information response material.



Post contracted agencies:

Public Relations: PR Partner München  
Societät für Öffentlichkeitsarbeit GmbH  
Friedrichstr. 31  
8000 München 40

Phone: (89) 33 68 81  
Telex: 186566 combo d  
Fax: (89) 33 68 46

Holder of the Account:  
Bettina B. Casimir  
Phone: (69) 25 22 84

Mailhouse: Lange Touristik Dienst  
Alte Dorfstr. 21  
6457 Maintal 2

Phone: (6109) 6 42 19  
Telex: 4157009 lang d  
Fax: (6109) 6 15 98

Assistance available from the Post:

Market intelligence, sales leads/referrals, counselling to travel industry, assistance in coordinating planned joint promotions/seminars and other activities in the territory, newsletters to travel trade, media selected partners in the industry, Public Affairs/Embassy (Bonn) and Tourism Canada/Ottawa.

Territory:

Federal Republic of Germany

population: Federal Republic of Germany: 78 million  
(after Oct 3, 1990\*)

\*On October 3, 1990 the former German Democratic Republic acceded to the Federal Republic of Germany, increasing the German population by about 25% and the German territory by about 40%.

## Situation Report: The Travel Market in Germany 1990

### Economic Development

The German economy continues to show healthy signs of steady growth. The FRG's GNP is predicted to rise by 3.5% in 1991 (source: The Economist). For travel expenditures abroad this would mean an increase of ca. 5.6% because with every 1% increase in GNP, travel expenditures rise by 1.6%.

German reunification is believed to boost German economy in spite of its high costs. Unemployment in the former FRG is at 6.2% (Oct. 90). For the former GDR it is very difficult to obtain reliable data, as there are strong fluctuations and "hidden unemployment". The German Federal Government is expecting a total economic growth of an average 3% for 1990 to 1994 and an annual average increase in GNP of 6% for 1990 to 1994 (source: Economic Ministry, Projection for the German Economy 1990 to 1994).

It is impossible to assess the influence of current political events (Eastern Europe, Gulf war...) on the German economy at the present moment.

### FRG Travel to Canada

In spite of a slight decrease of German visitors to North America, Canada still ranks second after the USA as a long-haul destination with some 300,000 visitors/year. Increasing competition is originating from far eastern countries, such as Thailand, and African countries (Kenia, South Africa).

Compared to the USA, Canada has a competitive advantage for nature/scenery, safety, friendliness and cleanliness; a disadvantage in historical sites and buildings, museums and art galleries, shopping and public transportation.

Tourism Canada's objective is to maintain Canada's large market share in the outdoor sports segment, while increasing its share in the cultural touring and the sports and entertainment segment.

A potential for market growth is perceived in promoting new and more diversified products, including shoulder season travel (e. g. winter sports).

Two trends can be identified: on the one hand a demand for up-scale special interest packages, on the other hand a trend towards part services and tailor-made packages. Travellers have become more demanding and more flexible and independant.



Tourism in the former GDR

There are no official statistics available on the number of East German citizens travelling abroad. The number of persons travelling to the East European countries, excluding Yugoslavia, is estimated to have been around 6,000,000 annually in the 1980s. Travel to the West was practically forbidden for anyone but pensioners and the most "trustworthy" persons.

With the opening of the borders it became possible for East Germans to realize their dreams of travelling abroad. However, for most of them the former West Germany and other European countries are among their prime destinations. A vacation in Canada is regarded as a once-in-a-lifetime, not very inexpensive holiday.

Activities on the East German market have therefore to be regarded as an investment in the future.

Most important promotional events

Trade and consumer fairs:	ITB Berlin	March
	Canada Market Place Frankfurt	November
Consumer fairs:	CMT Stuttgart	January
	CBR Munich	February
	Reisen Hamburg	February
	Reisemarkt Cologne	December

Key Partners associated with Post Activities

German Canada Committee (GCC): Air Canada, Canadian Airlines International, Deutsche Lufthansa AG, Government of Ontario, Government of Québec, Government of British Columbia, Government of Alberta.

German travel trade.





## Canadian Consulate General - Atlanta

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
PAL Trade Show	Feb. 5	Augusta	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Feb. 6	Savannah	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Feb. 7	Jacksonville	Travel Trade	W. Pando	305-443-3007
South Carolina SAE World Tour '91	Feb. 8	Columbia SC	MC&IT	J. Jones	803-771-4271
Florida Suncoast Travel Show	Feb. 8-10	St. Petersburg	Cons./Travel Trade	N. Katrack	813-544-5299
The Travel Marketplace	Feb. 11	Atlanta	Travel Trade	S. Oliver	800-635-7469
Travel Festival '91	Feb. 12	Atlanta	Travel Trade	S. Anderson	404-390-7575
The Travel Marketplace	Feb. 12	Orlando	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 13	Tampa	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 14	Ft. Lauderdale	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 15	Miami Beach	Travel Trade	S. Oliver	800-635-7469
Don Holland Trade Show	Feb. 18	Atlanta	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Feb. 19	Jacksonville	Travel Trade	D. Holland	612-938-8526
Southern Spring Show	Feb. 23-Mar. 3	Charlotte	Cons./Travel Trade	B. Honeycutt	704-376-6594
AAA International Travel	Mar. 3	Asheville NC	Travel Trade	L. McKinney	704-253-5376
Don Holland Trade Show	Mar. 11	Ft. Lauderdale	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Mar. 12	Orlando	Travel Trade	D. Holland	612-938-8526
PAL Trade Show	Mar. 19	Jackson MS	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Mar. 20	Memphis	Travel Trade	W. Pando	305-443-3007
Don Holland Trade Show	Mar. 25	Miami	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Mar. 26	West Palm Beach	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Mar. 27	Ft. Myers	Travel Trade	D. Holland	612-938-8526
Action 91	Apr. 3	Atlanta	MC&IT	S. Hunt	404-270-1248
ASTA Trade Show	Apr. 11-14	Tampa	Travel Trade	ASTA	703-739-2782
Skigroup '91	Apr. 16	Atlanta	Travel Trade	J. Simon	702-456-1119
Skigroup '91	Apr. 17	Tampa	Travel Trade	J. Simon	702-456-1119
Skigroup '91	Apr. 18	Orlando	Travel Trade	J. Simon	702-456-1119
Skigroup '91	Apr. 22	Ft. Lauderdale	Travel Trade	J. Simon	702-456-1119
Skigroup '91	Apr. 23	Miami	Travel Trade	J. Simon	702-456-1119
PAL Trade Show	Apr. 23	Tampa	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Apr. 24	Ft. Myers	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Apr. 25	West Palm Beach	Travel Trade	W. Pando	305-443-3007
Destination Canada	May 6-7	Atlanta	MC&IT	S. Paglioni	404-577-6810
Florida Sales Blitz	June 3-7	North & Central FL	MC&IT	S. Paglioni	404-577-6810
North Carolina Sales Blitz	Aug. 5-9	Raleigh/Greensboro	MC&IT	S. Paglioni	404-577-6810
Golf Outing Trade Show	Sept. 14-15	Montgomery	MC&IT	T. Dart	205-834-6850
Florida Ski Fest	Sept. 19	Orlando	Cons./Travel Trade	N. Reyelt	813-442-0089
Florida Ski Fest	Sept. 23	Clearwater	Cons./Travel Trade	N. Reyelt	813-442-0089
Florida Ski Fest	Sept. 24	Ft. Myers	Cons./Travel Trade	N. Reyelt	813-442-0089
PAL Trade Show	Sept. 25	Birmingham	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Sept. 26	Huntsville-AL	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Sept. 26	Mobile	Travel Trade	W. Pando	305-443-3007
SKIFAIR 91	Sept. 26	Miami	Travel Trade	C. Morse	305-271-0010
The Southern Skier	Sept. 28-29	Ft. Lauderdale	Cons./Travel Trade	K. Crawford	305-463-3303
PAL Trade Show	Sept. 30	Memphis	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Oct. 1	Nashville	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Oct. 2	Knoxville	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Oct. 3	Chattanooga	Travel Trade	W. Pando	305-443-3007
Don Holland Trade Show	Oct. 7	Tampa	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Oct. 8	Orlando	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Oct. 9	Sarasota	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Oct. 14	Miami	Travel Trade	D. Holland	612-938-8526
The Travel Marketplace	Oct. 14	Ft. Lauderdale	Travel Trade	S. Oliver	800-635-7469
Don Holland Trade Show	Oct. 15	Ft. Lauderdale	Travel Trade	D. Holland	612-938-8526
The Travel Marketplace	Oct. 15	Miami	Travel Trade	S. Oliver	800-635-7469

Canadian Corporate Directory - Ontario

Company Name	Address	City	Province	Telephone
ABC Corporation	123 Main St	Toronto	Ontario	(416) 555-1234
DEF Industries	456 Queen St	Mississauga	Ontario	(905) 555-5678
GHI Enterprises	789 King St	Hamilton	Ontario	(519) 555-9012
JKL Holdings	1010 Lakeshore Blvd	Scarborough	Ontario	(416) 555-3456
MNO Services	2020 Bay St	Windsor	Ontario	(519) 555-7890
PQR Systems	3030 Hurontario St	Mississauga	Ontario	(905) 555-2345
STU Manufacturing	4040 Steeles Ave	Markham	Ontario	(905) 555-6789
VWX Logistics	5050 Brimley Ave	Richmond Hill	Ontario	(905) 555-0123
YZA Construction	6060 Denison St	Brampton	Ontario	(905) 555-4567
BCD Retail	7070 Hurontario St	Mississauga	Ontario	(905) 555-8901
EFG Technology	8080 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-2345
HIJ Energy	9090 McCowan Rd	Markham	Ontario	(905) 555-6789
KLM Finance	10100 Sheppard Ave	Richmond Hill	Ontario	(905) 555-0123
NOP Insurance	11110 Hurontario St	Mississauga	Ontario	(905) 555-4567
QRS Healthcare	12120 Bay St	Windsor	Ontario	(519) 555-8901
TUV Education	13130 Lakeshore Blvd	Scarborough	Ontario	(416) 555-2345
WXY Media	14140 Queen St	Mississauga	Ontario	(905) 555-6789
ZAB Telecommunications	15150 King St	Hamilton	Ontario	(519) 555-0123
ACD Transportation	16160 Hurontario St	Mississauga	Ontario	(905) 555-4567
DEF Environmental	17170 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-8901
GHI Professional Services	18180 McCowan Rd	Markham	Ontario	(905) 555-2345
JKL Consulting	19190 Denison St	Brampton	Ontario	(905) 555-6789
MNO Engineering	20200 Hurontario St	Mississauga	Ontario	(905) 555-0123
PQR Architecture	21210 Bay St	Windsor	Ontario	(519) 555-4567
STU Marketing	22220 Lakeshore Blvd	Scarborough	Ontario	(416) 555-8901
VWX Advertising	23230 Queen St	Mississauga	Ontario	(905) 555-2345
YZA Public Relations	24240 King St	Hamilton	Ontario	(519) 555-6789
BCD Event Management	25250 Hurontario St	Mississauga	Ontario	(905) 555-0123
EFG Security	26260 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-4567
HIJ Risk Management	27270 McCowan Rd	Markham	Ontario	(905) 555-8901
KLM Insurance	28280 Denison St	Brampton	Ontario	(905) 555-2345
NOP Financial Services	29290 Hurontario St	Mississauga	Ontario	(905) 555-6789
QRS Investment Management	30300 Bay St	Windsor	Ontario	(519) 555-0123
TUV Real Estate	31310 Lakeshore Blvd	Scarborough	Ontario	(416) 555-4567
WXY Property Services	32320 Queen St	Mississauga	Ontario	(905) 555-8901
ZAB Home Inspection	33330 King St	Hamilton	Ontario	(519) 555-2345
ACD Home Maintenance	34340 Hurontario St	Mississauga	Ontario	(905) 555-6789
DEF Home Renovation	35350 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-0123
GHI Home Design	36360 McCowan Rd	Markham	Ontario	(905) 555-4567
JKL Home Staging	37370 Denison St	Brampton	Ontario	(905) 555-8901
MNO Home Moving	38380 Hurontario St	Mississauga	Ontario	(905) 555-2345
PQR Home Storage	39390 Bay St	Windsor	Ontario	(519) 555-6789
STU Home Care	40400 Lakeshore Blvd	Scarborough	Ontario	(416) 555-0123
VWX Home Services	41410 Queen St	Mississauga	Ontario	(905) 555-4567
YZA Home Maintenance	42420 King St	Hamilton	Ontario	(519) 555-8901
BCD Home Inspection	43430 Hurontario St	Mississauga	Ontario	(905) 555-2345
EFG Home Renovation	44440 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-6789
HIJ Home Design	45450 McCowan Rd	Markham	Ontario	(905) 555-0123
KLM Home Staging	46460 Denison St	Brampton	Ontario	(905) 555-4567
NOP Home Moving	47470 Hurontario St	Mississauga	Ontario	(905) 555-8901
QRS Home Storage	48480 Bay St	Windsor	Ontario	(519) 555-2345
TUV Home Care	49490 Lakeshore Blvd	Scarborough	Ontario	(416) 555-6789
WXY Home Services	50500 Queen St	Mississauga	Ontario	(905) 555-0123
ZAB Home Maintenance	51510 King St	Hamilton	Ontario	(519) 555-4567
ACD Home Inspection	52520 Hurontario St	Mississauga	Ontario	(905) 555-8901
DEF Home Renovation	53530 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-2345
GHI Home Design	54540 McCowan Rd	Markham	Ontario	(905) 555-6789
JKL Home Staging	55550 Denison St	Brampton	Ontario	(905) 555-0123
MNO Home Moving	56560 Hurontario St	Mississauga	Ontario	(905) 555-4567
PQR Home Storage	57570 Bay St	Windsor	Ontario	(519) 555-8901
STU Home Care	58580 Lakeshore Blvd	Scarborough	Ontario	(416) 555-2345
VWX Home Services	59590 Queen St	Mississauga	Ontario	(905) 555-6789
YZA Home Maintenance	60600 King St	Hamilton	Ontario	(519) 555-0123
BCD Home Inspection	61610 Hurontario St	Mississauga	Ontario	(905) 555-4567
EFG Home Renovation	62620 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-8901
HIJ Home Design	63630 McCowan Rd	Markham	Ontario	(905) 555-2345
KLM Home Staging	64640 Denison St	Brampton	Ontario	(905) 555-6789
NOP Home Moving	65650 Hurontario St	Mississauga	Ontario	(905) 555-0123
QRS Home Storage	66660 Bay St	Windsor	Ontario	(519) 555-4567
TUV Home Care	67670 Lakeshore Blvd	Scarborough	Ontario	(416) 555-8901
WXY Home Services	68680 Queen St	Mississauga	Ontario	(905) 555-2345
ZAB Home Maintenance	69690 King St	Hamilton	Ontario	(519) 555-6789
ACD Home Inspection	70700 Hurontario St	Mississauga	Ontario	(905) 555-0123
DEF Home Renovation	71710 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-4567
GHI Home Design	72720 McCowan Rd	Markham	Ontario	(905) 555-8901
JKL Home Staging	73730 Denison St	Brampton	Ontario	(905) 555-2345
MNO Home Moving	74740 Hurontario St	Mississauga	Ontario	(905) 555-6789
PQR Home Storage	75750 Bay St	Windsor	Ontario	(519) 555-0123
STU Home Care	76760 Lakeshore Blvd	Scarborough	Ontario	(416) 555-4567
VWX Home Services	77770 Queen St	Mississauga	Ontario	(905) 555-8901
YZA Home Maintenance	78780 King St	Hamilton	Ontario	(519) 555-2345
BCD Home Inspection	79790 Hurontario St	Mississauga	Ontario	(905) 555-6789
EFG Home Renovation	80800 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-0123
HIJ Home Design	81810 McCowan Rd	Markham	Ontario	(905) 555-4567
KLM Home Staging	82820 Denison St	Brampton	Ontario	(905) 555-8901
NOP Home Moving	83830 Hurontario St	Mississauga	Ontario	(905) 555-2345
QRS Home Storage	84840 Bay St	Windsor	Ontario	(519) 555-6789
TUV Home Care	85850 Lakeshore Blvd	Scarborough	Ontario	(416) 555-0123
WXY Home Services	86860 Queen St	Mississauga	Ontario	(905) 555-4567
ZAB Home Maintenance	87870 King St	Hamilton	Ontario	(519) 555-8901
ACD Home Inspection	88880 Hurontario St	Mississauga	Ontario	(905) 555-2345
DEF Home Renovation	89890 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-6789
GHI Home Design	90900 McCowan Rd	Markham	Ontario	(905) 555-0123
JKL Home Staging	91910 Denison St	Brampton	Ontario	(905) 555-4567
MNO Home Moving	92920 Hurontario St	Mississauga	Ontario	(905) 555-8901
PQR Home Storage	93930 Bay St	Windsor	Ontario	(519) 555-2345
STU Home Care	94940 Lakeshore Blvd	Scarborough	Ontario	(416) 555-6789
VWX Home Services	95950 Queen St	Mississauga	Ontario	(905) 555-0123
YZA Home Maintenance	96960 King St	Hamilton	Ontario	(519) 555-4567
BCD Home Inspection	97970 Hurontario St	Mississauga	Ontario	(905) 555-8901
EFG Home Renovation	98980 Burnhamthorpe Rd	Mississauga	Ontario	(905) 555-2345
HIJ Home Design	99990 McCowan Rd	Markham	Ontario	(905) 555-6789
KLM Home Staging	100000 Denison St	Brampton	Ontario	(905) 555-0123



Canadian Consulate General - Atlanta (Continued)

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
PAL Trade Show	Oct. 15	Pensacola	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Oct. 16	Tallahassee	Travel Trade	W. Pando	305-443-3007
Don Holland Trade Show	Oct. 16	West Palm Beach	Travel Trade	D. Holland	612-938-8526
The Travel Marketplace	Oct. 16	Tampa	Travel Trade	S. Oliver	800-635-7469
PAL Trade Show	Oct. 17	Jacksonville	Travel Trade	W. Pando	305-443-3007
Don Holland Trade Show	Oct. 17	Ft. Myers	Travel Trade	D. Holland	612-938-8526
The Travel Marketplace	Oct. 17	Orlando	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 18	Ft. Myers	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 21	Charlotte	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 22	Atlanta	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 23	Jacksonville	Travel Trade	S. Oliver	800-635-7469
PAL Trade Show	Oct. 23	Columbia SC	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Oct. 24	Greenville SC	Travel Trade	W. Pando	305-443-3007
The Travel Marketplace	Oct. 25	Raleigh-Durham	Travel Trade	S. Oliver	800-635-7469
• 1991 Ski Fest & Winter Vacation Show	Nov. 1-3	Raleigh	Consumer	G. Brown	919-787-1850
• AAA International Travel Fair	Nov. 3	Charlotte	Consumer	C. Schmauch	704-377-3600
PAL Trade Show	Nov. 4	Atlanta	Travel Trade	W. Pando	305-443-3007
Tennessee SAE Trade Show & Conv.	Nov. 12	Nashville	MC&IT	B. Brock	615-298-5944
PAL Trade Show	Nov. 12	Charlotte	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Nov. 13	Greensboro	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Nov. 14	Raleigh	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Nov. 18	Gainesville FL	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Nov. 19	Newport Richey FL	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Nov. 20	Clearwater	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Nov. 21	Ft. Myers	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Dec. 3	Daytona Beach	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Dec. 4	Melbourne	Travel Trade	W. Pando	305-443-3007
PAL Trade Show	Dec. 5	Boca Raton	Travel Trade	W. Pando	305-443-3007
North Carolina Assoc. Executives Show	Dec. 5	Raleigh	MC&IT	E. Upton	919-790-8343
• Florida SAE Trade Show & Conv.	Dec. 5-7	To be announced	MC&IT	S. Godorov	407-678-9344

• Indicates participation by the Canadian Consulate General - Atlanta (404-577-6810)





## Canadian Consulate General - Boston

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
• Eastern Fishing & Outdoor Expo	Feb. 6-10	Worcester MA	Consumer	P. Fuller	603-431-4315
• New England Outdoor Writers' Conf.	Feb. 8-10	Worcester MA	Media	R. Johansen	617-262-3760
Golf and Tennis Expo	Feb. 14-18	Boston	Consumer	L. Stanley	508-777-2311
• Northwest Territories Presentation	Feb. 19	Wakefield MA	Cons./Travel Trade	R. Johansen	617-262-3760
The Travel Marketplace	Feb. 20	Boston	Travel Trade	R. Toth	818-999-4070
• Outdoors Northeast Fishing & Sports	Feb. 21-24	W. Springfield MA	Consumer	F. Sousa	413-538-9069
The Travel Marketplace	Feb. 22	Providence	Travel Trade	R. Toth	818-999-4070
• Air Canada Product Launch	Feb. 25	Springfield	Travel Trade	J. Aiton	617-262-3760
• Air Canada Product Launch	Feb. 26	Braintree MA	Travel Trade	J. Aiton	617-262-3760
• Air Canada Product Launch	Feb. 27	Nashua NH	Travel Trade	J. Aiton	617-262-3760
• Henry Davis Trade Show	Feb. 27	Boston	Travel Trade	T. Keefe	508-851-4749
• Air Canada Product Launch	Feb. 28	Portland ME	Travel Trade	J. Aiton	617-262-3760
NE Fishing & Hunting Sport Show	Feb. 28-Mar. 3	Boston	Consumer	F. Sousa	413-538-9069
Ontario Marketplace	Mar. 19	Boston	Travel Trade	B. Adduci	617-266-7172
Ontario Marketplace	Mar. 21	Providence	Travel Trade	B. Adduci	617-266-7172
Maine Sportsman Show	Mar. 30-Apr. 1	Augusta ME	Consumer	H. Vanderweide	207-626-2405
NE Meeting Industry Conference	Apr. 11	Boston	MC&IT	G. Adams	508-689-2627
Senior Travel Days Show	Apr.	Providence	Senior Citizens	R. Gasperilla	617-740-2892
Continental Express Spring Trade Show	Apr.	Bangor ME	Travel Trade	L.A. Marks	201-961-0032
Ski Group '91	May 6	Waltham MA	Travel Trade	E. Haas	702-458-9292
• Appalachian Trail Conference	July	Williamstown MA	Consumer	S. Lewis	413-238-4406
• Delta Air Lines Summer Ski Show	Sept.	Boston	Travel Trade	R. Rich	702-785-2614
Henry Davis Trade Show	Oct. 8	Boston	Travel Trade	T. Keefe	508-851-4749
The Travel Marketplace	Oct. 9	Boston	Travel Trade	R. Toth	818-999-4070
The Travel Marketplace	Oct. 11	Providence	Travel Trade	R. Toth	818-999-4070
Colpitts Travel Show	Oct.	Dedham MA	Consumer	A. Krensky	617-326-7800
Continental Express Fall Trade Show	Oct.	Portland ME	Travel Trade	L.A. Marks	201-961-0032
Golf Group	Oct.	Boston	Travel Trade	E. Haas	702-456-1119
Silver Group	Oct.	Boston	MC&IT	H. Silver	403-228-4637
Interaction Dialogue	Nov. 19	Boston	MC&IT	R. Valles	212-366-6565
• Vermont Society of Travel Agents Show	Nov.	Burlington	Travel Trade	M.E. Clark	802-885-2191
• Boston Ski Show	Nov.	Boston	Consumer	B. Weichel	212-242-6582
• Quebec Ski Night	Nov.	Boston	Travel Trade	G. Biron	617-723-3366
• Quebec Meetings & Incentive Travel	Nov.	Boston	MC&IT	G. Biron	617-723-3366

\* Indicates participation by the Canadian Consulate General - Boston (617-262-3760)





### Canadian Consulate - Buffalo

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>
Western NY AAA Vacation Expo '91	Feb. 2-3	Buffalo	Consumer	S. Manfredo 716-633-9860
• Canada Showcase	Feb. 12	Buffalo	MC&IT	L. Niederlander 716-852-1247
• Buffalo Sport and Travel Exposition	Feb. 20-24	Buffalo	Consumer	S. Buterbaugh 814-725-3856
• Canada Day	Mar. 4	Watertown NY	Consumer	L. Niederlander 716-852-1247
• Canada Marketplace	Mar. 5	Syracuse	Travel Trade	L. Niederlander 716-852-1247
• Canada Marketplace	Mar. 6	Rochester	Travel Trade	L. Niederlander 716-852-1247
• Canada Marketplace	Mar. 7	Buffalo	Travel Trade	L. Niederlander 716-852-1247
1991 RV & Recreation Expo	Mar. 21-24	Buffalo	Consumer	T. Rust 716-695-5311
Travel Expo '91	Mar. 26-28	Buffalo	Travel Trade	D. Thornton 914-246-8733
Great Lakes Fishing & Outdoor Expo	Apr. 3-7	Buffalo	Consumer	P. Fuller 603-431-4315
Champlain Valley Sports & Travel Show	Apr. 5-7	Plattsburgh NY	Consumer	Nova Exposition 518-891-5952
Senior Quality of Life Expo	June 28-30	Syracuse	Senior Citizens	D. Redmond 800-223-7963
• Erie County Fair "Tribute to Canada"	Aug. 9-18	Buffalo	Consumer	O. Witt 716-649-3900
• Canada Marketplace	Sept. 24	Syracuse	Travel Trade	L. Niederlander 716-852-1247
• Canada Marketplace	Sept. 25	Rochester	Travel Trade	L. Niederlander 716-852-1247
• The Travel Marketplace	Sept. 26	Buffalo	Travel Trade	L. Niederlander 716-852-1247
Chenango Valley Coach Group Leaders	Oct.	Binghamton NY	Travel Trade	M. Solomon 607-723-9408
Blue Bird Coach Group Leader Show	Nov.	Buffalo	Travel Trade	M. Burrige 716-693-2700

\* Indicates participation by the Canadian Consulate - Buffalo (716-852-1247)





## Canadian Consulate General - Chicago

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
• All Canada Outdoor Show	Feb. 14-17	Green Bay	Consumer	P. Hopkins	414-866-2323
• Air Canada Joint Promo	Feb. 19	Green Bay	Travel Trade	A. Thrun	312-214-7980
• Air Canada Joint Promo	Feb. 20	Madison	Travel Trade	A. Thrun	312-214-7980
• Kansas City Star Times Travel Show	Feb. 20	Kansas City	Travel Trade	D. Holland	612-938-7239
• Chicago Golf Show	Feb. 22-24	Chicago	Consumer	S. Sidari	708-773-6575
• WFRV-TV Travel Show	Feb. 23-24	Green Bay	Consumer	R. Peal	414-494-9507
• Air Canada Joint Promo	Feb. 26	Urbana IL	Travel Trade	M. Podrasky	312-214-7979
• Air Canada Joint Promo	Feb. 27	Champaign IL	Travel Trade	M. Podrasky	312-214-7979
• Madison Newspaper Show	Mar. 5	Madison	Travel Trade	D. Holland	612-938-7239
• Chicago Tribune Show	Mar. 6	Chicago	Travel Trade	D. Holland	612-938-7239
• Milwaukee Journal Show	Mar. 7	Milwaukee	Travel Trade	D. Holland	612-938-7239
• Mayflower Tours Group Leaders Promo	Mar. 7	Hickory Hills IL	Travel Trade	C. Carlquist	708-960-3430
• Canoeopia '91	Mar. 15-17	Madison	Consumer	G. Sussman	608-256-4303
• Milwaukee Sentinel Sports Show	Mar. 15-24	Milwaukee	Consumer	M. Sabljak	414-224-2419
• St. Louis Post Dispatch Travel Show	Mar. 20	St. Louis	Travel Trade	R. Farroll	314-622-7325
• Mayflower Tours Group Leaders Promo	Mar. 21	Chicago	Travel Trade	C. Carlquist	708-960-3430
• Deer Show	Mar. 23-24	Springfield IL	Consumer	A. Miller	414-242-3990
• Deer Show	Apr. 5-7	Madison	Consumer	A. Miller	414-242-3990
• The Travel Marketplace	Apr. 23	Milwaukee	Travel Trade	M. Mohr	800-635-7469
• Henry Davis Trade Show I	Apr. 23	Chicago	Travel Trade	J. Diberardino	800-237-7452
• Henry Davis Trade Show II	Apr. 24	Chicago	Travel Trade	J. Diberardino	800-237-7452
• The Travel Marketplace	Apr. 24	Kansas City	Travel Trade	M. Mohr	800-635-7469
• The Travel Marketplace	Apr. 25	St. Louis	Travel Trade	M. Mohr	800-635-7469
• Henry Davis Trade Show	Apr. 25	Milwaukee	Travel Trade	J. Diberardino	800-237-7452
• Henry Davis Trade Show	Apr. 29	St. Louis	Travel Trade	M. Berman	800-237-7452
• Skigroup '91	May 16	Chicago	Travel Trade	J. Simon	702-456-1119
• Chicago Metro Ski Council Seminar	May 18	Chicago	Travel Trade	J. Jurgeto	312-751-8000
• ASAE Annual Meeting	July	Chicago	MC&IT	CSAE	202-626-2723
• Delta Air Lines Ski Show	Sept.	Chicago	Travel Trade	R. Rich	702-785-2614
• The Travel Marketplace	Sept. 24	Milwaukee	Travel Trade	M. Mohr	800-635-7469
• The Travel Marketplace	Sept. 25	Chicago	Travel Trade	M. Mohr	800-635-7469
• The Travel Marketplace	Sept. 26	O'Hare IL	Travel Trade	M. Mohr	800-635-7469
• The Travel Marketplace	Sept. 30	Kansas City	Travel Trade	M. Mohr	800-635-7469
• Milwaukee Journal Sentinel Show	Oct. 2	Milwaukee	Travel Trade	D. Holland	612-938-7239
• Chicago Tribune Show	Oct. 3	Chicago	Travel Trade	D. Holland	612-938-7239
• IT&ME	Oct. 15-17	Chicago	MC&IT	Hall-Erickson	708-850-7779
• Ski the West	Oct.	Chicago	Travel Trade	M. Mohr	800-635-7469
• Golfgroup '91	Oct.	Chicago	Travel Trade	J. Simon	702-456-1119
• The Travel Marketplace	Oct.	St. Louis	Travel Trade	M. Mohr	800-635-7469
• Chicago Ski Show	Oct. 31-Nov. 3	Chicago	Consumer	A. Adezio	312-622-4905
• Chicago Society of Assoc. Execs.	Dec.	Chicago	MC&IT	CSAE	312-236-2288

\* Indicates participation by the Canadian Consulate General - Chicago (312-427-1031)





## Canadian Consulate - Cleveland

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
Columbus Sports, Vac. & Travel Show	Feb. 2-10	Columbus	Consumer	T. Shutt	614-461-5257
Lakefront Trailways Open House	Feb. 4	Cleveland	Travel Trade	M. Goebel	216-267-8810
Akron Recreational Vehicle Show	Feb. 7-10	Akron	Consumer	J. Duncan	216-773-7474
Toledo Marine Dealers Boat Show	Feb. 13-17	Toledo	Consumer	T. Horman	419-866-6868
Toledo Boat & Sport Show	Feb. 20-24	Toledo	Consumer	J. Kromenacker	419-698-1598
The Travel Marketplace	Feb. 26	Pittsburgh	Travel Trade	R. Toth	818-999-4070
Pittsburgh Travel & Outdoor Show	Feb. 27-Mar. 3	Pittsburgh	Consumer	T. Fales	513-825-1600
Ohio Outdoor Show	Feb. 28-Mar. 3	Toledo	Consumer	E. Roberts	419-245-6280
American & Canadian Outdoor Show	Mar. 15-24	Cleveland	Consumer	C. Fassnacht	216-529-1300
Sports, Boat & Camper Show	Mar. 20-24	Dayton	Consumer	Show Manager	513-278-4776
Cleveland Plain Dealer Travel Show	Apr. 4	Cleveland	Travel Trade	Show Manager	216-344-4238
The Travel Marketplace	Apr. 4	Cleveland	Travel Trade	J & D Expo	818-999-4070
National Trade Shows	Apr. 8-11	Pittsburgh	Travel Trade	P. Gardiner	800-526-0041
The Travel Marketplace	Apr. 9	Cincinnati	Travel Trade	J & D Expo	818-999-4070
Senior Travel Days	Apr. 25	Cleveland	Senior Citizens	R. Gasparello	617-740-1185
Senior Travel Days	May 3	Pittsburgh	Senior Citizens	R. Gasparello	617-740-1185
Henry Davis Trade Show	May 6	Pittsburgh	Travel Trade	R. Manoogian	516-868-4178
Ski Group '91	May 8	Cleveland	Travel Trade	J. Simon	212-570-1950
International Bowhunters Challenge	July	Nelsonville OH	Consumer	B. Perine	614-753-3591
The Travel Marketplace	Oct. 1	Pittsburgh	Travel Trade	J & D Expo	818-999-4070
Great Day Tours Open House	Oct. 5	Cleveland	Travel Trade	A. Kinney	216-526-5350
The Travel Marketplace	Oct. 8	Cleveland	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 9	Columbus	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 10	Cincinnati	Travel Trade	J & D Expo	818-999-4070
Cleveland Plain Dealer Travel Show	Oct. 10	Cleveland	Travel Trade	Show Manager	216-344-4238
NTA Annual Convention & Trade Show	Oct. 27-Nov. 1	Lexington	Travel Trade	NTA	606-253-1036
Don Holland Trade Show	Oct. 29	Cleveland	Travel Trade	D. Holland	612-938-8526
Henry Davis Trade Show	Nov. 7	Pittsburgh	Travel Trade	R. Manoogian	516-868-4178
Ski & Winter Sports Fair	Nov. 7-10	Cleveland	Consumer	Show Manager	216-529-1300
Don Holland Trade Show	Nov. 11	Columbus	Travel Trade	D. Holland	612-938-8526
Don Holland Trade Show	Nov. 12	Cincinnati	Travel Trade	D. Holland	612-938-8526

\* Indicates participation by the Canadian Consulate - Cleveland (216-771-0150)





## Canadian Consulate General - Dallas

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
Hunting & Fishing Show	Feb. 1-3	Houston	Consumer	Show Manager	713-589-7991
Golf & Resort Show	Feb. 1-3	Houston	Consumer	Show Manager	800-635-7469
Boat Show	Feb. 1-3	Oklahoma City	Consumer	H. Wiersig	405-685-3600
• International Tours Inc.	Feb. 2	Dallas	Travel Trade	R. Carr	918-743-8687
Golf & Resort Show	Feb. 8-10	Dallas	Consumer	Show Manager	800-635-7469
Sport, Boat & Travel Show	Feb. 13-17	Wichita KS	Consumer	Show Manager	303-422-3888
Oklahoma Tackle Show	Feb. 14-17	Oklahoma City	Consumer	H. Wiersig	405-685-3600
• Experience Canada	Feb. 18	San Antonio	Travel Trade	S. Ellis	214-922-9806
• Experience Canada	Feb. 19	Austin	Travel Trade	S. Ellis	214-922-9806
• Experience Canada	Feb. 20	Houston	Travel Trade	S. Ellis	214-922-9806
• Experience Canada	Feb. 21	Dallas	Travel Trade	S. Ellis	214-922-9806
World of Cruises	Feb. 24	Dallas	Consumer	Show Manager	800-635-7469
The Travel Marketplace	Feb. 25	New Orleans	Travel Trade	J. Kaplan	818-999-4070
Southwest Sports & Vacation Show	Feb. 25-Mar. 3	Dallas	Consumer	Show Manager	214-686-8909
The Travel Marketplace	Feb. 26	Houston	Travel Trade	J. Kaplan	818-999-4070
The Travel Marketplace	Feb. 27	San Antonio	Travel Trade	J. Kaplan	818-999-4070
The Travel Marketplace	Feb. 28	Dallas	Travel Trade	J. Kaplan	818-999-4070
RV, Van and Outdoor Show	Feb. 28-Mar. 3	Oklahoma City	Consumer	G. Motley	405-495-3900
The Travel Marketplace	Mar. 1	Fort Worth	Travel Trade	J. Kaplan	818-999-4070
American Airlines Flyaway Supermarket	Mar. 1-3	Dallas	Consumer	E. Sachs	817-967-3153
Sports, Camper & Vacation Show	Mar. 12-17	Houston	Consumer	G. Coffen	713-242-7469
Sportsmans Show	Mar. 13-17	New Orleans	Consumer	Show Manager	504-466-0921
Hunting & Fishing Show	Mar. 15-17	Beaumont TX	Consumer	Show Manager	713-589-7991
Fish & Tackle Show	Mar. 15-17	Beaumont TX	Consumer	J. Poole	817-551-1219
Gun Collector Association Show	Mar. 20-24	Fort Worth	Consumer	Show Manager	918-745-9140
• Showcase Canada	Apr. 6-7	Tulsa	Consumer	Show Manager	918-745-9140
• Showcase Canada	May 8	Houston	MC&IT	J. Bradley	214-922-9806
• Showcase Canada	May 9	Dallas	MC&IT	J. Bradley	214-922-9806
Henry Davis Trade Show	May 13	Austin	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	May 14	Dallas	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	May 15	Houston	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	May 16	New Orleans	Travel Trade	V. Ressopoulos	516-868-4178
• Texas Society of Association Executives	May 16	New Orleans	Travel Trade	V. Ressopoulos	516-868-4178
Hunting & Fishing Show	June 13-15	Dallas	MC&IT	Show Manager	512-444-1974
Hunting & Fishing Show	July 18-24	Austin	Consumer	Show Manager	713-589-7991
Hunting & Fishing Show	Aug. 9-11	Corpus Christi	Consumer	Show Manager	713-589-7991
Hunting & Fishing Show	Aug. 21-25	Houston	Consumer	Show Manager	713-589-7991
Sport, Boat & Travel Show	Aug. 22-25	Tulsa	Consumer	F. Krisman	918-486-5514
Gun Collector Association Show	Oct. 19-20	Tulsa	Consumer	Show Manager	918-745-9140
Sports, Camper & Vacation Show	Oct. 23-27	Houston	Consumer	G. Coffen	713-242-7469
The Travel Marketplace	Oct. 28	Houston	Travel Trade	J. Kaplan	818-999-4070
• NAEM	Dec. 3-6	Dallas	MC&IT	Show Manager	214-255-8020
• MPI-PEC Conference	Dec. 8-11	San Antonio	MC&IT	MPI	214-746-5222

\* Indicates participation by the Canadian Consulate General - Dallas (214-922-9806)





## Canadian Consulate General - Detroit

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>
• GST Seminars with Travel Influencers	Feb. 4-7	Michigan	Travel Trade	M. Rice 313-567-2340
• All Canada Outdoors Vacation Show	Feb. 7-10	Grand Rapids MI	Consumer	M. Rice 313-567-2340
• Tour Operator/Wholesaler Seminar	Mar. 13	Grand Rapids MI	Travel Trade	M. Rice 313-567-2340
• Tour Operator/Wholesaler Seminar	Mar. 14	Southfield MI	Travel Trade	M. Rice 313-567-2340
• Michigan Ski Show	Mar.	Detroit	Consumer	M. Rice 313-567-2340
• Detroit News Travel Show	Apr. 11	Detroit	Travel Trade	M. Rice 313-567-2340
• Air Canada Tour Operator Seminar	Apr.	Indianapolis	Travel Trade	M. Rice 313-567-2340
• Air Canada Tour Operator Seminar	Apr.	Anderson IN	Travel Trade	M. Rice 313-567-2340
• Air Canada Tour Operator Seminar	Apr.	Bloomington IN	Travel Trade	M. Rice 313-567-2340
• Canada On Wheels	Apr.-May	Michigan	Travel Trade	M. Rice 313-567-2340
• NEBS Resort Mission with Quebec	May	Post Territory	Travel Trade	M. Rice 313-567-2340
• Ski Can Promo	June	Post Territory	Travel Trade	M. Rice 313-567-2340
• Montreal Jazz Radio Promo	June	Detroit	Consumer	M. Rice 313-567-2340
• ISAE Annual Conference	July 10-12	Bloomington IN	MC&IT	M. Rice 313-567-2340
• MSAE Annual Conference	July 17-19	Ypsilanti MI	MC&IT	M. Rice 313-567-2340
• MPI Conference	July 31-Aug. 3	Bellaire MI	MC&IT	M. Rice 313-567-2340
• American Trans Air Marketplace	July	Post Territory	Travel Trade	M. Rice 313-567-2340
• Post MC&IT Seminar & Marketplace	Sept.	Southfield MI	MC&IT	M. Rice 313-567-2340
• Don Holland Trade Show	Oct. 21	Grand Rapids MI	Travel Trade	M. Rice 313-567-2340
• Detroit News Travel Show	Oct. 22	Detroit	Travel Trade	M. Rice 313-567-2340
• Don Holland Trade Show	Oct. 28	Indianapolis	Travel Trade	M. Rice 313-567-2340
• Adventure Lecture Series	Nov.	Ann Arbor	Cons./Travel Trade	M. Rice 313-567-2340

• Indicates participation by the Canadian Consulate General - Detroit (313-567-2340)





## Canadian Consulate General - Los Angeles

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
Southern California Boat Show	Feb. 1-10	Los Angeles	Consumer	T. Tjaden	714-633-7581
Orange County Register Travel Show	Feb. 2-3	Orange County	Cons./Travel Trade	J. Grochow	714-953-4956
Metro Phoenix World Travel Show	Feb. 9-10	Phoenix	Cons./Travel Trade	M. Smith	602-948-4442
Kashi Bicycling & Outdoor Adventure	Feb. 9-10	San Diego	Consumer	D. Gindling	619-270-3478
Convention/Expo Summit II	Feb. 18-21	Las Vegas	MC&IT	P. Shack	702-739-0875
EPPIX '91	Feb. 19-21	Las Vegas	MC&IT	G. Reyes	617-449-6600
Phoenix Sports, Vacation & RV Show	Feb. 20-24	Phoenix	Consumer	E. Greenband	602-277-4748
Western Fishing, Tackle & Boat Show	Feb. 27-Mar. 3	Long Beach	Consumer	F. Hall	818-784-3036
Southern Arizona Travel Show	Mar. 1-2	Tucson	Cons./Travel Trade	M. Smith	602-948-4442
The Travel Show	Mar. 9-10	Los Angeles	Cons./Travel Trade	D. Freimann	818-999-4070
The Travel Marketplace	Mar. 11	Woodland Hills CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Mar. 12	Irvine CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Mar. 13	San Diego	Travel Trade	J & D Expo	818-999-4070
Western Fishing, Tackle & Boat Show	Mar. 13-17	San Diego	Consumer	F. Hall	818-784-3036
The Travel Marketplace	Mar. 14	Universal City CA	Travel Trade	J & D Expo	818-999-4070
Montreal/Toronto Promotion	Mar. 27	Los Angeles	MC&IT	D. Henick	213-687-7432
ASAE Spring Meeting, Conv. & Expo	Mar.	San Diego	MC&IT	D. Henick	213-687-7432
The Travel Marketplace	Apr. 15	Ontario CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Apr. 16	Anaheim	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Apr. 17	Los Angeles	Travel Trade	J & D Expo	818-999-4070
MOGO	Apr. 17-19	Los Angeles	MC&IT	D. McColi	404-220-2201
The Travel Marketplace	Apr. 18	Universal City CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Apr. 19	Santa Barbara	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Apr. 24	Las Vegas	Travel Trade	J & D Expo	818-999-4070
Annual Intl. Travel Industry Expo	Apr. 24-26	Las Vegas	Travel Trade	D. Lindeman	617-449-6600
The Travel Marketplace	Apr. 25	Scottsdale AZ	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Apr. 26	Tucson	Travel Trade	J & D Expo	818-999-4070
Time of Your Life Expo	Apr. 27-29	Los Angeles	Cons./Travel Trade	D. Stone	213-216-7993
Canada Media Marketplace	Apr. 30-May 1	Los Angeles	Media	M. Campbell	213-687-7432
WCAE	May 18-22	Phoenix	MC&IT	B. Mullen	602-265-1699
Ski Group '91	May 23	Phoenix	Travel Trade	E. Haas	702-456-1119
Ski Group '91	May 28	San Diego	Travel Trade	E. Haas	702-456-1119
Ski Group '91	May 29	Orange County	Travel Trade	E. Haas	702-456-1119
Ski Group '91	May 30	Los Angeles	Travel Trade	E. Haas	702-456-1119
SITE University	June 4-8	Los Angeles	MC&IT	SITE	212-575-0910
Annual Conference of TTRA	June 9-13	Long Beach	Travel Trade	W. Ziff-Levin	215-687-1100
MPI Annual Conference	June 23-26	Las Vegas	MC&IT	MPI	214-746-5245
The Travel Marketplace	Oct. 14	Ontario CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 15	Irvine CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 16	Los Angeles	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 28	Woodland Hills CA	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 29	Beverly Hills	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Oct. 30	Scottsdale AZ	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Nov. 11	San Diego	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Nov. 12	Anaheim	Travel Trade	J & D Expo	818-999-4070
Henry Davis Trade Show	Nov. 12	Los Angeles	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	Nov. 13	Anaheim	Travel Trade	V. Ressopoulos	516-868-4178
The Travel Marketplace	Nov. 13	Long Beach	Travel Trade	J & D Expo	818-999-4070
The Travel Marketplace	Nov. 13	Universal City CA	Travel Trade	J & D Expo	818-999-4070
Henry Davis Trade Show	Nov. 14	San Diego	Travel Trade	V. Ressopoulos	516-868-4178
The Travel Marketplace	Nov. 15	Ventura CA	Travel Trade	J & D Expo	818-999-4070

\* Indicates participation by the Canadian Consulate General - Los Angeles (213-687-7432)





## Canadian Consulate General - Minneapolis

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
• All-Canada Outdoor Show	Feb. 4-6	Omaha	Consumer	D. Hutchinson	414-866-2323
• All-Canada Outdoor Show	Feb. 7-10	Des Moines	Consumer	D. Hutchinson	414-866-2323
• Don Holland Trade Show	Feb. 18	Des Moines	Travel Trade	D. Holland	612-938-8526
• All-Canada Outdoor Show	Feb. 21-24	Minneapolis	Consumer	D. Hutchinson	414-866-2323
• Showcase Canada	Feb. 26	Omaha	MC&IT	B. Verner	612-333-4641
• Showcase Canada	Feb. 27	Des Moines	MC&IT	B. Verner	612-333-4641
• Showcase Canada	Feb. 28	Minneapolis	MC&IT	B. Verner	612-333-4641
• Experience Canada	Mar. 18	Omaha	Travel Trade/Media	B. Verner	612-333-4641
• Experience Canada	Mar. 19	Des Moines	Travel Trade/Media	B. Verner	612-333-4641
• Experience Canada	Mar. 20	Rochester MN	Travel Trade/Media	B. Verner	612-333-4641
• Experience Canada	Mar. 21	Minneapolis	Travel Trade/Media	B. Verner	612-333-4641
• Greater Northwest Sportshow	Mar. 29-Apr. 7	Minneapolis	Consumer	Show Manager	612-827-5833
• Tribune Trade Show	Apr. 9	Minneapolis	Travel Trade	V. Zukanoff	612-372-3879
• The Travel Marketplace	May 8	Minneapolis	Travel Trade	M. Mohr	818-990-4070
• GLAMER	Sept. 4	Minneapolis	Travel Trade	GLAMER	800-628-0993
• Senior Options	Sept. 14-15	Minneapolis	Senior Citizens	C. Snowberg	612-645-0261
• The Travel Marketplace	Sept. 23	Minneapolis	Travel Trade	M. Mohr	818-990-4070
• Don Holland Trade Show	Sept. 24	Cedar Rapids IA	Travel Trade	D. Holland	612-938-8526
• Don Holland Trade Show	Sept. 25	Des Moines	Travel Trade	D. Holland	612-938-8526
• Tribune Trade Show	Oct. 10	Minneapolis	Travel Trade	V. Zukanoff	612-372-3879
• Ski, Snowmobile & Winter Sportshow	Nov. 8-10	Minneapolis	Consumer	Show Manager	612-827-5833

\* Indicates participation by the Canadian Consulate General - Minneapolis (612-333-4641)





Canadian Consulate General - New York City

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
• Senior Travel Shows	Feb. 8	Melville NY	Senior Citizens	R. Gasparello	617-740-2890
The Travel Marketplace	Feb. 19	Long Island	Travel Trade	M. Mohr	800-635-7469
• We Love New York	Feb. 20-21	New York City	MC&IT	P. Boyer	212-768-2400
The Travel Marketplace	Feb. 21	Hartford	Travel Trade	M. Mohr	800-635-7469
• Henry Davis Trade Show	Feb. 25	Northern NJ	Travel Trade	V. Ressopoulos	516-868-4178
• Henry Davis Trade Show	Feb. 26	Hartford	Travel Trade	V. Ressopoulos	516-868-4178
• Fishing & Outdoor Exposition	Feb. 27-Mar. 3	Suffern NY	Consumer	P. Fuller	603-431-4315
ASAE Spring Convention	Mar. 3-7	Atlantic City	MC&IT	ASAE	202-626-2765
The Travel Marketplace	Mar. 4	Westchester NY	Travel Trade	M. Mohr	800-635-7469
• Henry Davis Trade Show	Mar. 4	Long Island	Travel Trade	V. Ressopoulos	516-868-4178
• Henry Davis Trade Show	Mar. 5	Westchester NY	Travel Trade	V. Ressopoulos	516-868-4178
The Travel Marketplace	Mar. 5	Secaucus NJ	Travel Trade	M. Mohr	800-635-7469
• Media Marketplace	Mar. 5-6	New York City	Media	L. Gerber	212-768-2400
• Henry Davis Trade Show	Mar. 6	Jersey Shore NJ	Travel Trade	V. Ressopoulos	516-868-4178
National Trade Show	Mar. 7	Cherry Hill NJ	Travel Trade	NTS Inc.	201-835-1340
Resort Show	Mar. 11-12	New York City	MC&IT	Show Manager	212-869-1300
• Senior Travel Shows	Mar. 15	Parsipanny NJ	Senior Citizens	R. Gasparello	617-740-2890
• Senior Travel Shows	Mar. 22	Atlantic City	Senior Citizens	R. Gasparello	617-740-2890
National Trade Show	Apr. 15	Jersey Shore NJ	Travel Trade	NTS Inc.	201-835-1340
National Trade Show	Apr. 16	Cranford NJ	Travel Trade	NTS Inc.	201-835-1340
National Trade Show	Apr. 17	Cedar Grove NJ	Travel Trade	NTS Inc.	201-835-1340
National Trade Show	Apr. 18	Bergen County NJ	Travel Trade	NTS Inc.	201-835-1340
National Trade Show	Apr. 25	Danbury CT	Travel Trade	NTS Inc.	201-835-1340
• Showcase Canada	June	New York City	MC&IT	P. Boyer	212-768-2400
The Travel Marketplace	Sept. 23	Secaucus NJ	Travel Trade	M. Mohr	800-635-7469
The Travel Marketplace	Sept. 24	Westchester NY	Travel Trade	M. Mohr	800-635-7469
The Travel Marketplace	Sept. 25	Long Island	Travel Trade	M. Mohr	800-635-7469
The Travel Marketplace	Oct. 2	New York City	Travel Trade	M. Mohr	800-635-7469
National Trade Show	Oct. 7	Stratford CT	Travel Trade	NTS Inc.	201-835-1340
National Trade Show	Oct. 8-9	Suffolk NY	Travel Trade	NTS Inc.	201-835-1340
National Trade Show	Oct. 10	Rockland NY	Travel Trade	NTS Inc.	201-835-1340
The Travel Marketplace	Oct. 10	Hartford	Travel Trade	M. Mohr	800-635-7469
Henry Davis Trade Show	Oct. 21	Northern NJ	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	Oct. 22	Hartford	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	Oct. 23	Long Island	Travel Trade	V. Ressopoulos	516-868-4178
Henry Davis Trade Show	Oct. 24	Long Island	Travel Trade	V. Ressopoulos	516-868-4178

\* Indicates participation by the Canadian Consulate General - New York City (212-768-2400)





## Canadian Consulate General - San Francisco

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
International Sportsmen's Expo	Feb. 20-24	Sacramento	Consumer	S. Doty	206-693-3700
San Francisco Chronicle Outdoor Show	Mar. 1-3	San Francisco	Consumer	G. Reynolds	414-786-5600
International Sportsmen's Expo	Mar. 6-10	Sacramento	Consumer	S. Doty	206-693-3700
RV/Boat/Travel Show	Mar. 6-10	Denver	Consumer	J. Haughton	303-422-3888
• Canada on Wheels	Mar. 11-14	San Francisco	Travel Trade	J. Norwood	415-543-2309
• Taste of Canada	Mar. 28	San Francisco	MC&IT	M. Elfassey	514-844-5400
• The Travel Marketplace	Oct. 31	Denver	Travel Trade	J. Norwood	415-543-2309
• The Travel Marketplace	Nov. 1	Salt Lake City	Travel Trade	J. Norwood	415-543-2309
• The Travel Marketplace	Nov. 18	Sacramento	Travel Trade	J. Norwood	415-543-2309
• The Travel Marketplace	Nov. 19	San Jose	Travel Trade	J. Norwood	415-543-2309
• The Travel Marketplace	Nov. 20	Oakland	Travel Trade	J. Norwood	415-543-2309
• The Travel Marketplace	Nov. 21	San Francisco	Travel Trade	J. Norwood	415-543-2309
The Travel Marketplace	Nov. 22	Santa Rosa CA	Travel Trade	M. Mohr	818-999-4070

\* Indicates participation by the Canadian Consulate General - San Francisco (415-543-2309)





## Canadian Consulate General - Seattle

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>
• Alberta Outdoor Adventure Show	Feb. 5	Seattle	Consumer	P. Mathias 403-427-4323
• International Sportsmen's Exposition	Feb. 6-10	Seattle	Consumer	E. Rice 206-693-3700
• International Sportsmen's Exposition	Feb. 7-10	Eugene OR	Consumer	E. Rice 206-693-3700
• The Travel Marketplace	Feb. 19	Portland	Travel Trade	Show Manager 800-535-7469
• The Travel Marketplace	Feb. 21	Seattle	Travel Trade	Show Manager 800-535-7469
• WSAE Sites & Services Fair	Apr.	Seattle	MC&IT	WSAE 206-778-6162
• The Travel Marketplace	Oct. 22	Portland	Travel Trade	Show Manager 800-535-7469
• Great Canadian Getaway	Oct.	Seattle	Travel Trade	J. Seidel 206-443-1777

• Indicates participation by the Canadian Consulate General - Seattle (206-443-1777)





## Canadian Embassy - Washington

<u>Event</u>	<u>Date</u>	<u>Location</u>	<u>Target Market</u>	<u>Contact Person</u>	
Senior America Trade Show	Feb. 22	Falls Church VA	Senior Citizens	R. Gasparello	617-740-1185
The Travel Marketplace	Feb. 25	Washington	Travel Trade	R. Toth	818-999-4070
The Travel Marketplace	Feb. 27	Philadelphia	Travel Trade	R. Toth	818-999-4070
The Travel Marketplace	Feb. 28	Baltimore	Travel Trade	R. Toth	818-999-4070
National Trade Shows	Mar. 4-7	Washington	Travel Trade	P. Gardiner	800-526-0041
National Trade Shows	Mar. 4-7	Baltimore	Travel Trade	P. Gardiner	800-526-0041
Henry Davis Trade Show	Mar. 7	Allentown PA	Travel Trade	R. Manoogian	516-868-4178
• Eastern Travel Trade Show	Mar. 18	Harrisburg PA	Travel Trade	A. Moeller	215-759-9697
• Eastern Travel Trade Show	Mar. 19	Scranton PA	Travel Trade	A. Moeller	215-759-9697
Henry Davis Trade Show	Mar. 19	Philadelphia	Travel Trade	R. Manoogian	516-868-4178
Henry Davis Trade Show	Mar. 20	Washington	Travel Trade	R. Manoogian	516-868-4178
• Eastern Travel Trade Show	Mar. 20	Allentown PA	Travel Trade	A. Moeller	215-759-9697
Henry Davis Trade Show	Mar. 21	Norfolk	Travel Trade	R. Manoogian	516-868-4178
The Travel Marketplace	Sept. 30	Philadelphia	Travel Trade	R. Toth	818-999-4070
The Travel Marketplace	Oct. 3	Washington	Travel Trade	R. Toth	818-999-4070
The Travel Marketplace	Oct. 4	Baltimore	Travel Trade	R. Toth	818-999-4070
Henry Davis Trade Show	Oct. 10	Allentown PA	Travel Trade	R. Manoogian	516-868-4178
Henry Davis Trade Show	Oct. 15	Philadelphia	Travel Trade	R. Manoogian	516-868-4178
Henry Davis Trade Show	Oct. 16	Washington	Travel Trade	R. Manoogian	516-868-4178
Henry Davis Trade Show	Oct. 17	Norfolk	Travel Trade	R. Manoogian	516-868-4178
National Trade Shows	Oct. 28-31	Richmond	Travel Trade	P. Gardiner	800-526-0041
• Canada's Call	Nov. 5	Washington	MC&IT	C. Naumann	202-682-7706
• Canada's Call	Nov. 6	Philadelphia	MC&IT	C. Naumann	202-682-7706

\* Indicates participation by the Canadian Embassy - Washington (202-682-7706)





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