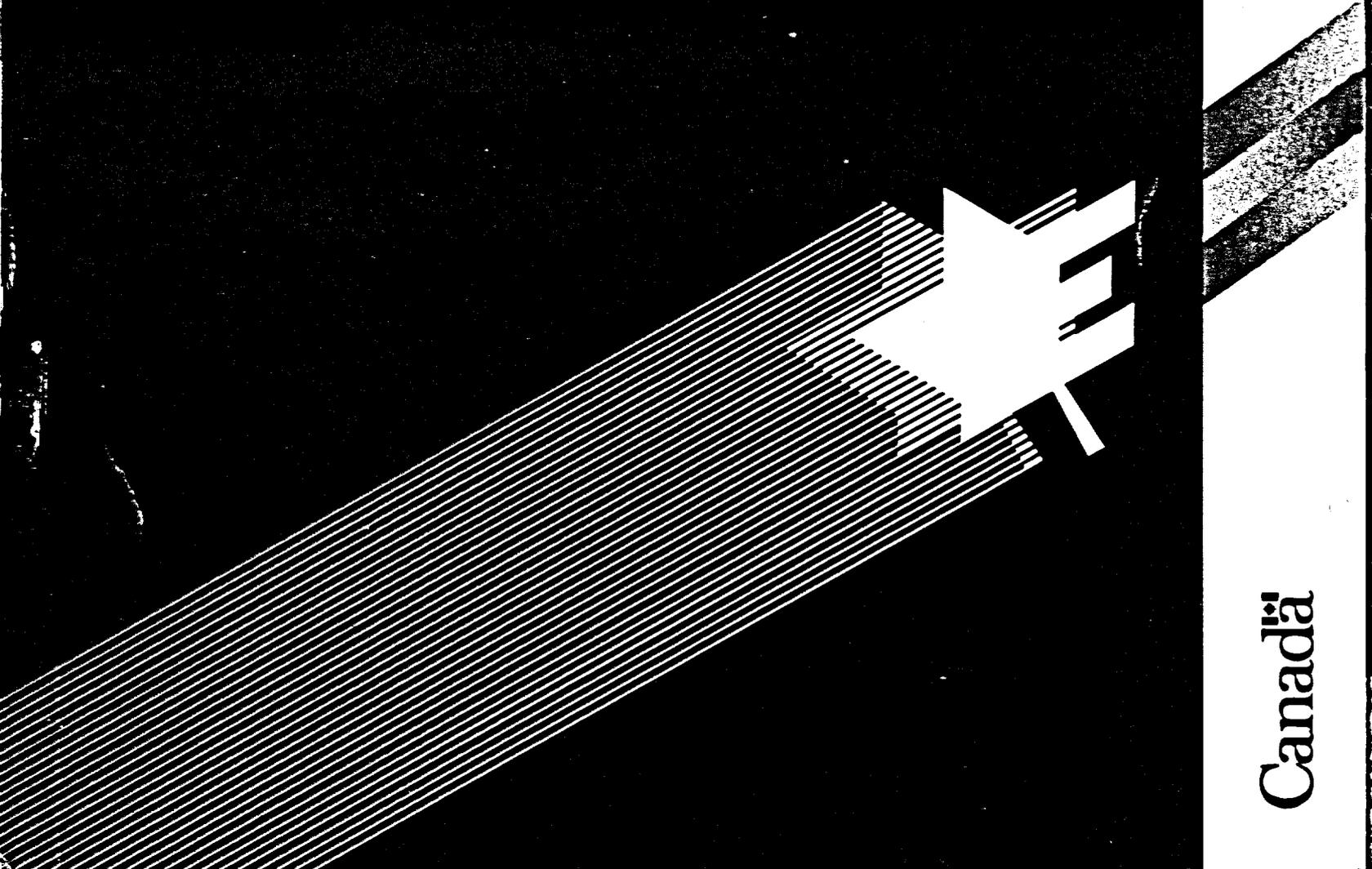
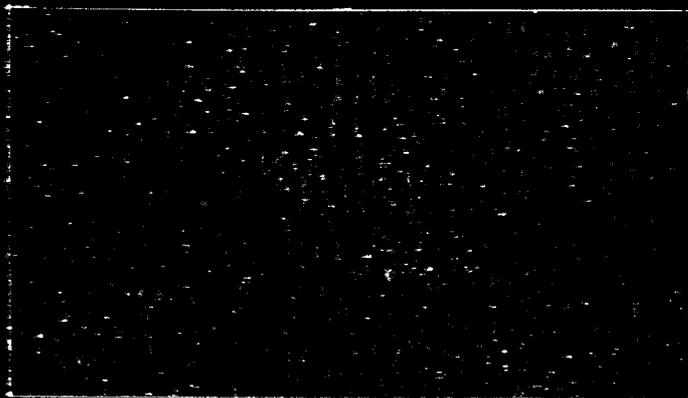


CA1
EA408
90S77
c.1
DOCS.



External Affairs and
International Trade Canada Affaires extérieures et
Commerce extérieur Canada

Canada

SUMMARY
OF TOURISM PROGRAM
STRATEGY IN U.S.

43-758-915

TOURISM PROGRAM STRATEGY SUMMARY

This document prepared by External Affairs and International Trade Canada (EAITC) is for the benefit of the Canadian travel industry. It is intended to serve as an indication of the strengths and limitations of the Canadian tourism product in the United States.

It also highlights the major opportunities and the main thrust of the tourism program delivery, and the potential for growth.

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 (UTW)
Lester B. Pearson Building
125 Sussex Drive
Ottawa, Ontario
K1A 0G2
Telephone: (613) 993-7344
Fax: (613) 990-9119

Dept. of External Affairs
Min. des Affaires extérieures

APR 18 1991

RETURN TO DEPARTMENTAL LIBRARY
RETOURNER A LA BIBLIOTHEQUE DU MINISTÈRE

Table of Contents
Tourism Program Strategy Summary

	<u>PAGE #</u>
Canadian Consulate General Atlanta	1 - 2
Canadian Consulate General Boston	3 - 4
Canadian Consulate Buffalo	5 - 6
Canadian Consulate General Chicago	7 - 8
Canadian Government, Trade Office - Cincinnati	9 - 10
Canadian Consulate Cleveland	11 - 12
Canadian Government, Trade Office - Pittsburgh	13 - 14
Canadian Consulate General Dallas	15 - 16
Canadian Consulate General Detroit	17 - 18
Canadian Consulate General Los Angeles	19 - 20
Canadian Consulate General Minneapolis	21 - 22
Canadian Consulate General New York	23 - 24
Canadian Consulate General San Francisco	25 - 26
Canadian Consulate General Seattle	27 - 28
Canadian Embassy - Washington D.C.	29 - 30

Tourism Program Strategy Summary

Post: Atlanta

Territory Covered: Georgia, Florida, North Carolina, South Carolina, Mississippi, Alabama, Tennessee, Puerto Rico, U.S. Virgin Islands

Post Contact: Michael Alexander, Consul & Trade Commissioner (Tourism)

Phone Number: (404) 577-6810

Fax Number: (404) 524-5046

- **Major opportunities and challenges:** With burgeoning population growth in younger age groups, and the luxury of excellent direct air service to Eastern Canada, Florida represents the greatest potential for leisure traffic. Similarly, as one of the largest net gainers of Fortune 500 companies moving into the state, Georgia remains the focus of MC & IT potential. Overall, the southeast is home to 32 of the largest industrial Fortune 500 companies.

- **Potential for market growth:** With American Airlines non-stop Nashville-Toronto service, Tennessee should provide more fly-drive business to Ontario and points beyond. There are more motorcoach Tour Operators active to Canada from North Carolina than from any other state in the southeast. Overall, there is excellent potential for outdoor/adventure traffic from the SEUS with 65 outdoor clubs and some 30 outdoor shows annually. In addition to the strong corporate meetings market, there is excellent association market potential to be found in the Research Triangle area out of Raleigh/Durham, N.C. and growing incentive potential in Jacksonville, Florida. Putting aside speculation about the effects of dramatic detente on the U.S. defense budget, the SEUS is home to a dozen major military communities providing a ready-made market segment with the disposable income, interest and predisposition to travel.

- **Specific strengths and limitations including brief competitive analysis:** Despite Canada's continuing appeal as a Spring/Summer/Fall destination which represents a retreat from the heat, and despite non-stop air service from Florida and Tennessee, Canada is still largely inaccessible by air and suffers from lack of awareness due to a dearth of consumer advertising throughout the SEUS. Excellent air connections to Europe and the Caribbean backed by strong advertising and promotional campaigns will continue to hive off Canada's market share.

- Main thrust of program; priority segment and marketing strategy: Market intelligence, including the expansion, updating and refining of databases on Meeting Planners, Tour Operators, Media and other travel influencers will continue to be a priority with Atlanta. The MC & IT market will be exploited to the fullest possible extent.

- Key Partners associated with post activities:

- Air Canada (Florida)
- American Airlines
- Delta
- United
- Tauck Tours
- Brennan Tours
- Provinces of Alberta
- Ontario, Quebec
- Cities of Vancouver
- Calgary
- Montreal and Quebec city.

- List of most important promotion events plus location and date:

- AARP Annual Convention, Orlando, June 1990
- SITE Regional Conference, Orlando, June 1990
- Canada-wide MC&IT Promotion, Atlanta, April 1991
- Product launch promotions major Florida cities, February, March 1991.

Tourism Program Strategy Summary

Post: Boston

Territory Covered: Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Post Contact: Jacques Duval, Consul & Trade Commissioner (Tourism)

Phone Number: (617) 536-1731

Fax Number (617) 262-3415

- **Major opportunities and challenges:** Highest per capita income (CDN \$23,420) in US. and low unemployment. High tech, defense and financial services are key sectors for corporate meetings. One third of the population is 45 years or older, an encouraging sign for increased travel due to more time and high discretionary income.

- **Potential for market growth:** Potential for growth in corporate meetings, outdoor/adventure markets and touring/city/culture.

- **Specific strength and limitations including brief competitive analysis:**

- Proximity, uncrowded destinations, the safety factor and the "foreignness" of our tourism product, all remain definite advantages for Canada;
- Direct air access from Boston to Toronto, Ottawa, Montreal, Halifax, Saint John and Yarmouth;
- New England offers a wide variety of travel experiences not unlike those promoted by Canadian destinations.

- **Main thrust of program emphasizing priority segments and marketing strategy:**

1. Corporate meetings: increased awareness of meeting products through presentations, and site inspections.
2. Touring/City/Culture: Increase package tour offerings and work with specialized media.
3. Outdoor/Adventure: Work with specialized media and increase awareness of Canadian adventure products.

- **Key partners associated with post activities:** Ontario, Quebec, Atlantic Canada, Toronto, Ottawa, Montreal, Quebec City, Halifax, Saint John, USAir, Air Canada, Delta Air Lines, Air Nova, UTL, various Canadian and local private sector.

- List of most important promotion events plus location and date:

- Media influencer promo, Boston, March 1991;
- MC & IT presentations: Atlantic Canada, Portland, March '91; Ontario, Boston, May '90; Quebec, Boston, November '90;
- Adventure Canada marketplace (tent.), Boston, March '91.

Tourism Program Strategy Summary

Post: Buffalo

Territory Covered: Western, Central and Upstate New York
(excluding Albany)

Post Contact: Lynn Niederlander, Commerical Officer (Tourism)

Phone Number: (716) 852-1345

Fax Number: (716) 852-4340

- **Major opportunities and challenges:** Creating awareness that there is more to Canada than Ontario and Quebec, dispelling notion that Quebecers are "unfriendly and don't speak English", taking advantage of publicity created by FTA in promoting Canadian meetings, all while not ignoring fact that Ontario's market share is down and perhaps needs fresh approach in its marketing from this area.

- **Specific strengths and limitations including brief competitive analysis:** Strengths are proximity to Toronto and Toronto airport for Western and Eastern departures. Montreal and Ottawa hold potential for weekend getaways, as these are direct air connections which Quebec City can not offer. There is much competition for those looking for resort getaways, including NY, PA, Florida and Caribbean. Canadian resorts need to be positioned as an attractive year-round alternative.

- **Main thrust of program emphasizing priority segments and marketing strategy:** Touring remains prime segment. Objectives will be to assist operators in diversifying tours to continually attract clients, increase media coverage and increase attention to West and East Coast and Heartland. For the MC&IT segment, objectives will be to keep Canadian product in view to ensure that it is considered by site inspections, Showcase and newsletter. For outdoor, ski and soft adventure will be promoted along with golf and hunting/fishing. We will continue educational programs for travel trade and auto clubs.

- **Key partners associated with post activities:** Ontario Ministry of Tourism and Recreation, Quebec, PEI, Saskatchewan, Alberta, Nova Scotia, Newfoundland, Air Canada, USAIR, Princess Tours, UTL Holiday Tours,, Si Can, Toronto, Ottawa, Quebec City, Montreal, Julie de Haas and Associates, and local motorcoach operators.

- List of most important promotional events plus location and date:

- PEI "We're Akin to Ireland" Promotion - April 4 - Buffalo.
- Saskatchewan "Taste of Saskatchewan" promotion - June (TBA).
- NEBS Seminar - Tourism - Buffalo (TBA).
- Laurentian Site Inspection for meeting planners - September 1990.
- Canada Marketplaces - Upstate New York -- September 24-26.
- Gannett Newspapers "World of Travel" Showcase - Rochester - October 4-7 Consumer show.
- Buffalo and Syracuse Ski Shows - Oct. 18-21 and Oct. 25-28.
- MC&IT "Canada Showcase" -- Feb., 1991 (TBA).
- Buffalo Outdoor Show - March, 1991.
- AAA Travel Counsellors Toronto reverse marketplace - May.

Tourism Program Strategy Summary

Post: Chicago

Territory Covered: Territory includes the States of Illinois, Indiana (the counties of Jasper, Lake, Laporte, Newton and Porter), Wisconsin and Missouri. The Post also services the Quad-City area of Iowa, and the Kansas city area of Kansas

Post Contact: C. Durban Morrow, Consul & Trade Commissioner (Tourism)

Phone Number: (312) 427-1031

Fax Number: (312) 922-0637

- **Major Opportunities and challenges:** The Chicago market offers unique opportunities in the Meetings, Convention, and Incentive Travel segments as well as the Outdoor/Adventure, Special Interest Groups, and Travel Trade segments. Major challenges for the Chicago territory lie ahead particularly with meeting the demands of the primary and secondary Canadian product suppliers for new leads.
- **Potential for market growth:** There is excellent potential for market growth in each of the major segments staffed by locally engaged personnel in Chicago.
- **Specific strengths and limitations including brief competitive analysis:** In the Travel Trade segment Canada has a strong fall, spring and summer product that is well packaged and competitive. Toronto, Montreal and Vancouver are very strong in the Meetings, Conventions and Incentive Travel segments and there is a strong awareness in the Chicago territory of Canada as an outdoor/adventure, wilderness, scenic beauty destination. Competitively the three major states in the territory have come on very strong in the past three years doubling their promotional dollars to now exceed \$48 million. The local states are capturing the close to home tourist who want to take four or five mini vacations throughout the year. Air traffic between the U.S. and is limited in load capacity and is very price sensitive.
- **Main thrust of program emphasizing priority segments and marketing strategy:** The main thrust of the Chicago tourism program will be in the Meetings, Conventions and Incentive Travel segments; the Motor Coach Tour wholesaler/Operator segments; and the Outdoor/Adventure/Special Interest group, Media and Automobile Club segments. The marketing strategies in all three major segments will be to match travel buyers with

the travel sellers through territorial marketplaces, co-operative marketing programs, site-inspections, reverse marketplaces and VCP media/trade visitations.

- Key partners associated with post activities: Key partners associated with post activities remain the province/territories/Canadian transportation companies/local tour operators and wholesalers, major lodge operators, automobile clubs in each state as well as major city and convention bureaus.

- List of most important promotional events plus location and date:

- Canada Showcase, Chicago, Feb. 13-15, 1990/91;
- I.T. & M.E., Chicago, Oct. 09-11, 1990/91;
- All Canada Show, Chicago, Jan. 1990/91;
- All Canada Show, St. Louis, Jan. 1990/91;
- All Canada Show, Milwaukee, Jan. 1990/91;
- All Canada Show, Madison, Jan. 1990/91;
- Milwaukee Journal Trade Show, Milwaukee, Feb. 1990/91;
- Chicago Tribune Travel Show, Chicago, Feb. 1990/91;
- St. Louis Post Dispatch, St. Louis, Apr. 1990/91;
- Kansas City Star Travel Show, Kansas City, Apr. 1990/91;
- Travel Marketplace Milwaukee, Milwaukee, Apr. 1990/91;
- Ski Group '90, Chicago, May 17, 1990

Tourism Program Strategy Summary

Post: Canadian Government, Trade Office - Cincinnati

Territory Covered: Southern Ohio, Kentucky; Major markets - Cincinnati, Columbus, Dayton, Louisville and Lexington

Post Contact: Richard Dunn, Commercial Officer (Tourism)

Phone Number: (513) 762-7655

Fax Number: (513) 762-7802

- **Major Opportunities and challenges:** The Cincinnati Satellite Post is responsible for tourism promotion in all marketing sectors, Touring, Media, MC&IT, Outdoors, and City. Over the past 2 years, the primary tourism marketing focus has been on the Media and MC&IT sectors. Our greatest challenge is creating Canada awareness and maintaining travel influencer assistance in a highly competitive travel market.

- **Potential for market growth:** 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 that consumers are unaware of Canada and its opportunities. With few exceptions though, these operators would be very interested in exploring new possibilities and have suggested that more consumer exposure (e.g. - advertising) would be of substantial benefit to them and Canada as a whole.

- **Specific strengths and limitations including brief competitive analysis:** Our office has created new markets for Canadian tour products by working extensively with the tour operators and travel agents of the area. In addition, this office also liaises with the National Tour Association that is headquartered in Lexington, KY. The Post maintains active contact with these organizations through seminars, fam tours, trade shows and general assistance.

- **Main thrust of program emphasizing priority segments and marketing strategy:** We have focused considerable attention on the media sector as there is very limited Canadian private/public sector advertising in this market. We have created a qualified database in the MC&IT sector, with 8 confirmed bookings in 1989 with a value of \$3.9 mil. Also, in the Incentive market there are 23 of the US Insurance Fortune 500s located in territory and a major office of Carlson Marketing.

- Key partners associated with post activities:

- Air Canada/Air Toronto
- C.P. Hotels
- Province of Ontario
- Province of Quebec

- List of most important promotional events plus location and date:

- Post/Air Canada Joint Travel Promotions, Cincinnati, Columbus, Dayton, March;
- Outdoor Writers of Ohio, Annual Convention, Location varies, April;
- All Canada Sport Show, Columbus, January;
- Cincinnati Sport & Travel Show, Cincinnati, January

Tourism Program Strategy Summary

Post: Canadian Consulate - Cleveland

Territory Covered: Northern Ohio; Major markets - Akron, Cleveland, and Toledo Southern Ohio, Kentucky; See Cincinnati, Western Pennsylvania, West Virginia; See Pittsburgh

Post Contact: John K. Latkovich, Commercial Officer (Tourism)

Phone Number: (216) 771-0150

Fax Number: (216) 771-1688

- **Major Opportunities and challenges:** The Northern Ohio area is a strong, established market for Canadian tour products as virtually every major Tour Operator/Travel Agent actively sells Canada. There are market opportunities for new/unique tour components and accessible meeting/convention destinations. The major challenge is to maintain market share in the face of increased destination/price competition and increase shoulder/non-peak visits.

- **Potential for market growth:** The Cleveland-Akron (CMSA) area is the 12th largest consumer buying market in the U.S. and Toledo is 78th with an aggregate population of 4.2 mil. With excellent land and air access to Canada, there is growth potential for uniquely "CANADIAN" tour components and excellent growth potential for "Beyond Toronto" touring experiences. Also, there is an increase in the demand for the affordable long-weekend, mini-vacation. This is a direct result of double income families that have schedule/time constraints and get-away needs.

- **Specific strengths and limitations including brief competitive analysis:** Our office has established excellent contacts with the travel trade, travel media and AAA Clubs, for the ability to broker Canadian tour products in the most advantageous sales distribution network, and we are starting to establish a presence in the Meeting and Incentive market. There is competition from Ohio and border states offering similar travel experiences less expensive than Canadian products, in addition to intense competition from southern US, warm-weather land and cruise destinations.

- **Main thrust of program emphasizing priority segments and marketing strategy:** We initiate and/or coordinate promotions directed at the target markets:

- Touring - VCP (T), Product-Testing Tours, Marketplaces, VCP (M), Ed. Seminars;

- Meetings/Conventions - Site Inspections, Familiarization Tours;
- Outdoor/Adventure - VCP(M), Sport Show/Ski Show/Ski Club promotions;
- City - Reverse Marketplaces - VCP(T).

- Key partners associated with post activities:

- Air Canada/Air Ontario;
- Province of Ontario;
- Province of Quebec.

- List of most important promotional events plus location and date:

- CLVND - March, All Canada Travel Marketplace. (By Post);
- TOLDO - March, All Canada Travel Marketplace. (By Post);
- CLVND - March and Oct., The Plain Dealer Travel Show;
- CLVND - May and Oct., The Travel Marketplace.

Tourism Program Strategy Summary

Post: Pittsburgh, PA

Territory Covered: Western PA, West Virginia

Post Contact: Vi Boehm, Commercial Officer. (Tourism)

Phone Number: (412) 392-2308

Fax Number: (412) 392-2317

- **Major Opportunities and challenges:** Toronto has so much to offer but they are currently in the process of pricing themselves out of the travel market. We need to know of specific incentives and promotions as soon as they are announced. It is also imperative to educate the travel industry on Canadian geography. Unfortunately, industry dislike selling destinations it is not familiar with.

- **Potential for market growth:** I am currently working with Worldview Inc., based in Pittsburgh with a client base of over 50 million individuals and corporations. They will also produce and represent the Eastern Airlines Canadian Tour Program in the U.S. Market. According to a recent (12/89) Birch Scarboro (Script Howard) travel survey, 10,000 people visit Canada monthly from the Greater Pittsburgh Metropolitan area, (55% visit Ontario).

- **Specific strengths and limitations including brief competitive analysis:** Air service to Canada is excellent in this area, there are 17 flights daily to Toronto with connecting service across Canada. Driving time from Pittsburgh to Niagara is 4 1/2 hours, to Toronto 6 hours. Border crossings are relatively easy. Pittsburgh is home to 200 arts organizations and Toronto is a very attractive cultural destination for this area. British Columbia and Alberta are becoming an attracted MC & IT destination for this area. We are limited by two major newspapers and two major magazines, but we make the most of it on a regular basis.

- **Main thrust of program emphasizing priority segments and marketing strategy:** Considering the fact that Pittsburgh is a major center of Fortune 500 companies and ranks fourth in the nation for world headquarters, our main thrust in 1990 will be toward MC and IT. This year will be primarily dedicated to;
A. Developing a complete MC & IT data base including profiles.
B. Presenting seminars to both MPI and PSAE members on Canadian products and government assistance available to

planners. C. Site inspections and one FAM sponsored by CP Hotels and this office. We will also work closely with tour operators and media.

- Key partners associated with post activities:

- Canadian Airlines International
- Eastern Airline
- US Air
- CP Hotels
- Via Rail
- Ski Can
- Ontario Ministry of Tourism
- Quebec Tourism
- Tourism BC

- List of most important promotional events plus location and date:

- Travel sports and outdoor show, Pittsburgh, PA (consumer show) 2-28 to 3-4, 1990;
- Eastern Airline Show, Pittsburgh, PA (travel trade) 3-26-90;
- Ski Group, Pittsburgh, PA (Ski influences) 11-90;
- Travel Trade Seminar, Sponsored by this office, Pittsburgh, PA 11-90.

Tourism Program Strategy Summary

Post: Dallas, Texas, U.S.A.

Territory Covered: The States of Texas, Oklahoma, Kansas, Arkansas, Louisiana, New Mexico.

Post Contact: Mr. J.S.A. Sotvedt, Consul & Senior Trade Commissioner/Tourism Program Manager.

Phone Number: (214) 922-9806

Fax Number: (214) 922-9815

- **Major opportunities and challenges:** implementation of Post initiated electronic market intelligence bulletin targeted to four thousand contacts in the south-west United States. Implementation of an accelerated program of market intelligence in the Post territory for furtherance to Tourism Canada for dissemination to the private and public sectors across Canada. Development of a cooperative program to develop city tours to Ontario and Quebec with Canadian Airlines International, Midway Airlines and major Texas tour operator.

- **Potential for market growth:** An economic recovery is taking place in Texas, fueled by diversification of industry and major corporate relocations to the Sunbelt. Unemployment as of December declined to 6.6% as compared with 7.2% in 1988 while Dallas/Fort Worth unemployment stood at 4.6% and Houston at 4.9%. Economic recovery in other five states in the Post territory is improving but not as rapidly as in Texas. Possible reduction in military expenditures, especially in Texas, has generated some concern.

- **Specific strengths and limitations including brief competitive analysis:** There has been an increase in the number of motor coach tour programs featuring Canada but this increase is tempered by a decrease to Atlantic Canada and zero growth to Central Canada and the Prairie Provinces. There was substantial growth to Alberta, British Columbia and Yukon. Limited direct air service is a factor in the development of new tour programs to Canada. APEX fares to Canada are not competitive. No advertising to support Post marketing initiatives.

- **Main thrust of program emphasizing priority segments and marketing strategy:** The primary thrust of the Post Program will be in support of market intelligence, on behalf of the tourism industry in Canada and the identification of marketing and investment opportunities in the Post Territory. Media

relations will play an important role in the dissemination of information in support of travel industry marketing initiatives and in generating consumer awareness of Canada, its tourism products and services.

- Key partners associated with post activities: American Airlines Inc.; Air Canada Ltd.; C.P. Hotels and Resorts Ltd.; University Tours Ltd.; Contact Pacific Ltd.; American Automobile Association Inc.; D/FW Tours Inc.; Greyhound Travel Services Inc.; Sunbelt Motivation Inc.; Canadian Provincial, Territorial and Municipal government departments of tourism.

- List of most important promotional events plus location and date:

- Experience Canada. February 19/22, 1990. San Antonio, Austin, Houston, Dallas. Travel Industry Marketplace. 26 Exhibitors, attendance 900 senior travel agents, media and industry influencers.
- Showcase Canada. May 9/10, 1990. Houston and Dallas. Meetings, Conventions and Incentive Travel Marketplace. 27 Exhibitors, attendance 250 meeting planners, incentive house, association and corporate executives.
- Texas Society of Association Executives annual convention, June 07/10, 1990. Corpus Christi.
- Religious Conference Management Association annual convention, Jan. 29/Feb. 01, 1991. Corpus Christi.

Tourism Program Strategy Summary

Post: Detroit, Michigan

Territory Covered: Michigan and Indiana

Post Contact: Martin M. Rice, Commerical Officer (Tourism)

Phone Number: (313) 567-2340

Fax Number (313) 567-2164

- **Major opportunities and challenges:** A border post in which the awareness of Canada is extremely high. Centrally located in the U.S. allows for tour development to mainly Central and both Eastern and Western Canada. 11,000,00 U.S. residents annually utilize the four entry points into Canada from the state of Michigan. Priority to increase business to Alberta/BC in ski and touring segments. Major challenge is to educate travellers to the viability of Canadian destinations highlighting affordability, accessibility, cleanliness and safety.
- **Potential for market growth:** From Indiana to BC/Alberta in Touring Market as well as MC&IT development due to the heavy concentration of fraternities, insurance companies and association groups. As a border post there is a great potential for all Canadian destinations within a 1-2 day drive (Ontario & Quebec). Rural weekend experiences on the incline which included country inns, bed & breakfast and resorts.
- **Specific strengths and limitations including brief competitive analysis:** Density of senior clubs that have time and disposable income to travel. Strong motorcoach industry that heavily favours Canada. Air connections from territory as well as high prices to fly pose a challenge. U.S. carriers from territory offer discounted rates (i.e. DTW-CHI \$49 return).
- **Main thrust of program emphasizing priority segments and marketing strategy:** Focussed marketing aimed at specific product lines incorporating educational seminars in city, outdoors, touring and MC&IT segments. (Outdoors) - Ski priority - (Touring City). Independent tour operator packages and weekend getaways. Developing high yield opportunities and interest to Eastern/Western Canada.
- **Key partners associated with post activities:** Provinces of Ontario and Quebec with expanding tour development with the provinces of Alberta, British Columbia, as well as offering full co-operation to individual VCB's and provinces as opportunities arise.

- List of most important promotional events plus location and date:

- Tour Operator/Wholesaler Educational Seminars - Grand Rapids/Southfield, Michigan - Mar 90-91
- Travel Trade Marketplaces - Indianapolis/Ft. Wayne, IN. - March 1990
- All Canada Ski how - Dearborn, Mich - Oct. 2, 1990, - Indianapolis Nov., 1990
- Ontario Presentation to AAA Indiana, April 18-19, 1990
- Detroit News Travel Show - Apr. 3 and Oct. 16, 1990
- Allen Travel Show - Oct. 11, 1990 Fort Wayne, Indiana
- MC&IT Seminar with Province of Quebec Sept. 18-20, 1990 Indianapolis-Lansing-Dearborn
- All Canada Resort Marketplace, Dearborn, Michigan, March 1991.

Tourism Program Strategy Summary

Post: Los Angeles

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

Post Contact: John Schofield, Consul & Trade Commissioner (Tourism)

Phone Number: (213) 687-7432

Fax Number: (213) 620-8827

- **Major opportunities and challenges:** Major opportunities are widespread in this very dynamic territory which continues to outpace the rest of the nation. If Southern California were a separate country, it would rank as the world's 10th in terms of GDP. The FTA will foster increased traffic flow, particularly in the Meetings, Conventions and Incentive Travel segment. Exciting opportunities exist via celebrity ski events and the filming of movies in Canada. However, we still suffer from a bland, cold image, and our inadequate air transportation links are a challenge. With the rising Canadian dollar and GST, Canada is losing its price advantage.

- **Potential for market growth:** By emphasizing Canada's strong points, there is excellent potential for significant growth in the market, including out of Las Vegas and Arizona. To facilitate this, Canada needs to develop more unique products and international events, and to communicate new opportunities to the field.

- **Specific strengths and limitations including brief competitive analysis:** Specific strengths in the market are based upon its growing population, affluence and propensity to travel. Fortunately, we are able to stimulate impressive media coverage that helps increase the relatively low awareness levels of Canada as a desirable travel destination. However, our drastic budget cuts and almost non-existent promotional material limit our ability to remain competitive in the early 1990's. With the changing face of Europe in 1992 and reform in Eastern Europe, these regions are becoming increasingly competitive, as is the Asia/Pacific region.

- **Main thrust of program emphasizing priority segments and marketing strategy:** In the early 1990's, our main thrust will be the following: the development of highly qualified leads, timely and high quality local market intelligence, travel industry education, support for new product development, and

media relations. Southern Californians have a demonstrably wide palette of vacation interests, including in array of sporting, fitness, cultural and self-improvement (holistic) experiences. Increasingly, resort and city "getaways" are very popular, and the touring market is expanding as more affluent seniors are retiring here. In the foreseeable future, we'll use highly focused fairs and site inspections to have our targeted travel influencers sample the Canadian product, continue to educate highly qualified clientele in the marketplace via specialized workshop seminars, and initiate a media marketplace to promote product/market matches.

- **Key partners associated with past activities:** We anticipate that our key partners next year will include the Canadian provinces of Alberta, B.C., Ontario and Quebec; the cities of Toronto, Montreal and Vancouver; airlines such as Air Canada, CAIL, Delta and American; qualified MC&IT influencers; targeted tourism media; and tour wholesalers actively working this marketplace.

- **List of most important promotional events plus location and date:** Our most important upcoming promotional events include:

- Jan. 29, 1990 - Los Angeles: MC&IT Outstanding Canadian Resorts Promotion
- Feb. 5-8, 1990 - Southern California: 5 travel agent workshop seminars
- Mar 27, 1990 - Orange County: Montreal/Toronto MC&IT Promotion
- May 8, 1990 - Los Angeles: Canada Media Marketplace
- Sept. 1990 - Los Angeles: B.C. MC&IT Promotion
- Oct. 1990 - Southern California: 5 travel agent workshop seminars
- Oct. 1990 - Los Angeles: Alberta MC&IT Promotion
- Feb. 1991 - Southern California: 5 travel agent workshop seminars.

Tourism Program Strategy Summary

Post: Minneapolis

Territory Covered: Minnesota, North Dakota, South Dakota, Iowa, Nebraska, Montana

Post Contact: Bruce Verner, Consul & Trade Commissioner (Tourism)

Phone Number: (612) 333-4641

Fax Number: (612) 332-4061

- **Major Opportunities and challenges:** International Travel Arrangers (ITA) based in Eagan, MN plans, with United Express, to run summer charters to Montreal and Quebec City for 1990.

The All-Canada Outdoor Vacation Shows have expanded to several new cities in response to demand.

Increased interest/activity out of the major ski clubs, specifically for Whistler/Blackcomb for 1991.

Imposition of GST; devaluation of Canadian dollar; obstacles including multiple vehicle permits, restrictions regarding use of provincial motorcoaches and step-on guides, in some provinces, generating negative feedback and concern by territory tour operators and may make future tour development difficult.

- **Potential for market growth:**

- Shorter duration trips 3-4 days max.
- adventure tours for handicapped
- service by new regional carriers
- senior citizen organizations.

- **Specific strengths and limitations including brief competitive analysis:**

- Continued growth in new or expanded tours
- Territory is one of 3 top incentive production centers
- lack of direct air service to Canadian destinations poses major problem
- Closure of off-line Air Canada office
- Opening of new off-line Canadian Airlines International office
- Competition experiencing growth in conference centre properties.

- Main thrust of program emphasizing priority segments and marketing strategy: Travel Trade: To sponsor, with Canadian partners, approximately 10 trade events in 6 states to familiarize travel influencers with Canada product & increase awareness of Canada as an international travel destination. Secondly, to introduce operators to new destinations through familiarization; objective is to have 8 new or expanded tour destinations.

Outdoor/adventure: Strategy aimed toward ski market is to co-sponsor or participate in winter promotions/events; objective is to expose winter products to travel trade and ski club decision makers.

MC&IT: To produce 3 marketplaces for 20 Canadian partners, and co-sponsor 20 site inspection visits; objective is to increase MC&IT bookings from this territory by 5% and expose Canadian product to 100 mtg/incentive influencers.

- Key partners associated with post activities: Air Canada; CP Hotels; Saskatchewan; Manitoba; Ontario; Alberta; Allied Tours; Northwest Airlines.

- List of most important promotional events plus location and date:

- "Showcase Canada" (MC&IT), March 20, 1990 - Omaha, NE; March 21, 1990 - Des Moines, IA; March 22, 1990 - Minneapolis.
- "Experience Canada" (trade/media), March 26, 1990 - Omaha, NE; March 27, 1990 - Des Moines, IA; March 28, 1990 - Rochester, MN; March 29, 1990 - Minneapolis.

Tourism Program Strategy Summary

Post: Canadian Consulate General - New York City

Territory Covered: Connecticut, New Jersey New York (Albany south to New York State border), and Bermuda

Post Contact: John Kern, Consul & Trade Commissioner (Tourism)

Phone Number: (212) 768-2400

Fax Number: (212) 768-2440

- **Major Opportunities and challenges:** Opportunities from this market lie in the perception of Canada being a clean and safe destination, as well as the exchange rate and the trend to shorter and more frequent vacations. The challenges include: perception of becoming too expensive, increased advertising/promotional tourism budgets of our competitors, direct air access to Western and Atlantic Canada and similarity of product.

- **Potential for market growth:** Tour wholesalers/operators are looking for new destinations or unique components to add to their packages. The seniors market has growth potential, as well as programs that feature outdoor, soft adventure, arts, cultural and heritage experience. The meetings and conventions segment also has a good potential for holding more corporate functions in Canada.

- **Specific strengths and limitations including brief competitive analysis:** Strengths include proximity of this market to Canada; our touring, outdoor/adventure and city products, including skiing, shopping, cultural and heritage experiences. Limitations include direct air access and the perception of Canada as being similar to the U.S. Our competition have subsequently increased their budgets. U.S. states and even countries are pooling their marketing resources, i.e. European Travel Commission: The "hot" destination in 1990 will be Europe.

- **Main thrust of program emphasizing priority segments and marketing strategy:** A further concentrated effort will be placed on the following segments: Touring, Meeting/Conventions/Incentive Travel, Outdoor/Adventure and City. Strategies will include provision of market intelligence to the Canadian Industry, product testing and educational tours, site inspections visits (group/individual) for media, travel influencers and meetings/corporate/incentive planners.

- Key partners associated with post activities: Provinces: Ontario, Quebec, Alberta, Atlantic Canada; Private Sectors: Air Canada, CP Hotels, Canadian Airlines International, City Express, Toronto, Montreal, Ottawa, Vancouver, Calgary, Halifax, Edmonton, Quebec City.

- List of most important promotional events plus location and date:

- The Senior American Trade Shows (Seniors), Feb. 2, 23 March 2, 31, 1990, New Jersey, New York, Connecticut;
- "We Love New York" Day (Assns.), Feb. 21, 22, 1990, New York City;
- Travel Marketplaces (Trade), Feb. 26, 27, 28, Mar. 1, 1990, New York, New Jersey, Connecticut;
- Media Marketplace (Media), March 6, 7, 1990, New York City;
- "A Taste of Canada" (Corporate), June 14, 1990, New York City.

Tourism Program Strategy Summary

Post: San Francisco

Territory Covered: Northern California, Colorado, Hawaii, Nevada (except Clark County), Utah, and Wyoming

Post Contact: Patrick Coyle, Consul & Trade Commissioner (Tourism)

Phone Number: (415) 495-6021

Fax Number: (415) 541-7708

- **Major Opportunities and challenges:** An extremely large high income active population with desire to experience new and exciting things and destinations. A senior citizen market financially capable of taking several trips each year. Good corporate meeting and convention business. The awareness of Canada in the prospective clients mind and Canada's ability to deliver the experience desired is the challenge.

- **Potential for market growth:** Automobile travel to Western Canada continues to be stable and can be a source of continuing growth. The current air service to Ontario, Quebec, and the Maritimes provides unique but limited travel opportunities. Northwest, American and Air Canada airlines are presently offering special fares to this area. There is potential in the Corporate meeting, convention and incentive travel tourism sectors. Senior citizens group travel from the territory is an important market segment with excellent potential.

- **Specific strengths and limitations including brief competitive analysis:** Mexico, Southern California, and Hawaii tend to be the biggest competition for the pleasure travel market. Excellent skiing can be found only two to three hours away therefore Canadian ski destinations must target that away trip a large percentage of skiers take each year and compete with Europe and further away USA destinations. Air service to Canada although improved is still quite limited.

- **Main thrust of program emphasizing priority segments and marketing strategy:** Cooperative promotional activities with tour operators to increase travel in the Spring/Fall and Winter is an important priority. Increasing Senior Citizen travel by cooperative product testing tours for group travel directors and educational seminars to this market segment. VCP/Media and contacts within the territory in order to increase Canadian exposure in all forms of printed and electronic media. The

M&IT market is important and receives as much attention as possible with limited human resources.

- Key partners associated with post activities: Air Canada, Canadian Airlines International, Tourism British Columbia, Golden Gate Tours, J-Tek Ventures, Talbot Tours, Tourism Ontario and Tourism Quebec.

- List of most important promotional events plus location and date:

- Canada Travel Marketplace, Honolulu, in late January;
- Canada on Wheels, a series of six marketplaces in the San Francisco Bay Area, last week in February;
- Coordination of a Canadian presence at J&D Expo - Travel Marketplaces held in Oct. and Nov.

Tourism Program Strategy Summary

Post: Seattle

Territory Covered: Washington, Oregon, Idaho, Alaska

Post Contact: Patricia Filteau, Vice Consul & Assistant Trade Commissioner (Tourism)

Phone Number: (206) 443-1777

Fax Number: (206) 443-1782

- **Major opportunities and challenges:** The ongoing expansion of direct air service offers new opportunities in all sectors. The cruise and ferry boat traffic is ever expanding with refitting of vessels and adding craft to existing fleets out of the Port of Seattle. High domestic airfares, hotel accommodations, and gasoline prices present formidable barriers to expanding the U.S. market share.

Potential for market growth: The primary, targetted, growth development areas are Meetings, Conventions and Incentive Travel with particular emphasis on the smaller meetings in getaway resort destinations. Soft adventure for the mature market will continue to expand. The territory expects to maintain a bouyant touring market fueled by the largest and most active AAA membership in the USA. Specific product development is occurring in golf, birding, cross country skiing and disabled touring.

- **Specific strengths and limitations including brief competitive analysis:** The proximity to the Western Canada market, linguistic and cultural similarities, familial connections and familiarity are the greatest strengths enabling market maintenance and development. At the same time the sense of accessible but foreign, nearby and different are concomittant effective lures. Expanding air connections are an asset while the lack of direct air connections to many regions of Canada continues to impose limitations to market development.

- **Main thrust of program emphasizing priority segments and marketing strategy:** The greatest emphasis will be placed on expanding: the electronic media coverage while maintaining the current high level of print media editorials; the soft adventure product and seniors motorcoach tours; the incentive and small meeting component of the MCIT sector. The Post has stepped up its market intelligence reporting and the provision of fully qualified leads and timely effective follow-up with

both the Canadian and U.S. clients remain a priority in Seattle's marketing approach. The marketing strategy will include site inspections, product testing tours, media visits, educational seminars, trade shows, market places and most importantly identifying opportunities are matching clients.

- Key partners associated with post activities:

- Provinces: British Columbia, Alberta, N.W.T., Saskatchewan, Ontario;
- Visitors & Convention Bureaux: Victoria, Edmonton, Toronto, Quebec;
- Private Sector: Air Canada, Air B.C., Time Air, Thai Air, Lake Union Air, Canadian Airlines, Brennan, Princess, Holland America, Jo Van Os, Special Odysseys, Society Expeditions, Grayline of Seattle.

- List of most important promotional events plus location and date:

- Ontario Marketplace Toronto PNW Wholesalers (Trade), February 18-21, 1990;
- Princess Tours product launches, Bellevue, Portland (Trade), February 26-28, 1990;
- Tourism Victoria "Tea" (Trade), March 6, 1990;
- J & D Travel Marketplace, Portland, Seattle (Trade), April 18-19, 1990
- WSAE Sites & Services Fair, Tacoma (MCIT), April 18, 1990;
- Seattle International Superfam (Trade, Corporate), May 4-6, 1990;
- SATW Atlantic Canada Promotion, Seattle (Media), May 7, 1990;
- Canada Media Marketplace, Los Angeles (Media), May 8, 1990.

Tourism Program Strategy Summary

Post: Washington, D.C.

Territory Covered: District of Columbia, Maryland, Virginia, Delaware and Eastern Pennsylvania

Post Contact: H. Van der Veer, Commercial Counsellor

Phone Number: (202) 682-1740

Fax Number: (202) 682-7726

- **Major Opportunities and challenges:** Convention and Meetings Market provides greatest opportunity provided we play by Association rules. Greatest Challenge: competition is fierce, well financed and has effective attractive alternatives in all seasons.

- **Potential for market growth:** Some growth in Pennsylvania Motor Coach Market, as well as development of corporate market clientele.

- **Specific strengths and limitations including brief competitive analysis:** Nearness, familiarity and relative ease of access to Canadian product gives us an edge on International market. Domestic product more competitive at times (either perceived or real). Considerable concern about GST and price-sensitivity which could lead to perception of Canada as being too expensive.

- **Main thrust of program emphasizing priority segments and marketing strategy:**

1. Continue to develop association market for leads on major meetings (250 and over).
2. Develop corporate market for frequent but smaller meetings.
3. Develop Motor Coach Tour package market.
4. Assist Canadian partners through joint promotions.

- **Key partners associated with post activities:**

- Cities like Toronto, Vancouver, Ottawa, Montreal, Quebec, Halifax and their convention centres.
- Major provinces Alberta, Quebec, Ontario.
- Airlines, hotel chains represented in marketplace.

- **List most important promotional events plus location and date:**

- Canada's Call - Meeting Planners Marketplace, Philadelphia, Nov. 6, 1990, Washington, Nov. 7, 8, 1990;

- Canada 101 - Travel Trade Education Seminars,
Philadelphia, Baltimore, Washington, Richmond, March
1990;
- Canada Ski Show, Washington Nov. 1990.

LIBRARY E A/BIBLIOTHEQUE A E

3 5036 20075678 4





External Affairs and
International Trade Canada

Affaires extérieures et
Commerce extérieur Canada