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Consumer Show Program - Report And Evaluation
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1.0 INTRODUCTION AND BACKGROUND

In 1985 the Tourism Industry Association of the Northwest Territories (TIANWT) assumed the responsibility for all consumer show activities and incorporated, within a three-year marketing plan, a Consumer Show Program.

Under mandate from the Economic Development Agreement Management Board (EDA), TIANWT developed a Consumer Show Program which would coordinate the attendance of NWT tourism operators at targeted consumer shows throughout North America. Consumer show markets were identified based on research from existing consumer shows, information from the Department of Economic Development and Tourism and Tourism Canada, recommendations from NWT operators and zone associations, and markets identified through the TIANWT implementation plan.

A Consumer Show Program was implemented in 1987, 1988 and 1989. In 1989, a two year proposal for the Consumer Show Program for 1990 and 1991 was approved in the TIANWT Marketing Plan. Based on the results of the evaluation, adjustments were made to the Program for implementation in the following years. For example based on operator results at specific shows in terms of actual sales results some shows were dropped and others added to the program. Further modifications were also made to booth design and set-up.

In 1990, due to the restructuring of the TIANWT, the Department of Economic Development and Tourism assumed management responsibility for the Program.

In the 1987 Program, a total of 30 operators participated in 10 consumer shows, representing a total of 22 exhibits. These operators were identified through the zone associations. In 1988, a total of 23 operators participated in9consumershows, representing a total of 37 exhibits. Operators were accepted based on their success in a draw system. In 1989, a total of 21 operators participated in 12 consumer shows, representing a total of 57 exhibits. These operators applied to attend shows of their choice and were selected for participation if they met criteria set out in the application form. In 1990, a total of 22 operators participated in 11 consumer shows representing 46 exhibits. These operators were accepted on a first-come first-served basis by region and then by sector.

In 1991, a total of 26 operators participated in 9 consumer shows representing 54 exhibits. These operators were accepted on a first-come first-served basis by region and then by sector.

2.0 OBJECTIVES

The following program objectives were identified for the Tourism Industry Association and all Tourism Zone Associations through the TIANWT three year marketing strategy and the subsequent 1990/91 strategy:

1. To provide a favourable sales environment for private sector tourism operators, to enhance their marketing efforts, through the attendance of targeting consumer shows in Canada and the United States.

2. To generate qualified tourism leads for: use by private sector partners; fulfillment of inquiries for NWT literature; and to assist in the development of market data.

300 IMPLEMENTATION

The following is a synopsis of activities that were conducted as part of the Consumer Show Program:

3.1 Show Coordination
3.2 Receptions
3.3 Test Markets
3.4 Response Inquiry Card
3.5 Show Evaluation

3.1 SHOW COORDINATION

3.1.1- Identified Consumer Shows

Based on research from existing consumer shows, information from Tourism Canada, the Department of Economic Development and Tourism and markets identified through the TIA implementation plan, the following nine . nsumer shows were chosen for inclusion in the program:

- Anaheim Sports Vacation & RV Show – Anaheim, California
- Chicago All-Canada – St. Charles, Illinois
- International Sportmen's Exposition - Seattle, Washington
- Minneapolis All-Canada - Shakopee, Minnesota
- Great Outdoor Adventure Fair - San Francisco, California
- Canadian National Sportsmen's Show – Edmonton. Alberta
- Canadian National Sportsmen's Show – Toronto. . ntario
- Northwest Sports Show – Minneapolis, Minne a

The Great Outdoor Adventure Fair was included in the Program for the first time in 1991.

3.1.2- Operator Application

Operators meeting the following criteria were invited to apply to participate in the Consumer Show Program.

- operators holding a valid NWT tourism license
- operators offering a bona fide package tour (includes transportation, accommodation and activities)

A $200.00 non-refundable deposit per show per operator was required to reserve space. Applications were accepted on a first-come first-sewed basis by region and then by sector. Twenty-seven operators applied to the Program to participate in 54 exhibit spaces. All operators were successful in applying to the Program. One operator canceled. Five operators were partially successful in acquiring all space applied for in the program. Space was provided on an individual basis. Appendix A contains a listing of all operators who participated in the 1990 Consumer Show Program.

3.13- TIANWT Assistance

Economic Development and Tourism made available exterior dome displays. for operators to customize and negotiated to provide assistance for airline transportation on the basis of one operator per organization per show. Transportation was provided on a positive space pass basis from a NWT departure point to the nearest Air Canada, Canadian Airlines International First Air or Northwest Territorial destination and return. Transportation was provided at a 75% discount fare by Northwest Airlines between Edmonton, Toronto, Winnipeg and Minneapolis return.

Booth space was selected and purchased for each operator. Furniture rentals were coordinated and provided by Economic Development and Tourism and included: 1 draped table any size, 2 chairs, 10’ x 10’ carpet and 1 wastepaper basket.

3.2 RECEPTIONS

In order to complement operators attendance at consumer shows, two key target markets were selected for presentations which would provide venues for the largest number of NWT operators. Presentations were coordinated in Boston and Toronto to showcase NWT tourism products to make contact with the travel trade, media, special interest groups and consumers.

In the past, program coordinators were unsuccessful in locating a show in the Boston area which would prove successful for promoting NWT products. As a result, it was agreed between the private sector and Economic Development and Tourism that a presentation should be hosted in order to enable NWT tourism operators (particularly the Eastern Arctic) to penetrate the market.

A total of 22 operators participated in the two receptions. Based on contact provided by the Canadian Consulate in Boston, Economic Development and Tourism, the guest speaker and individual operators, invitation lists were developed for both presentations. Evening cocktail receptions were hosted in both venues. The following are the attendance figures for each presentation.

- Boston 88
- Toronto 237

See Appendix B for full report.

33 RESPONSE INQUIRY CARD

In addition to sales and leads obtained by participating operators at the shows, Economic Development and Tourism also assisted potential customers with tourism product information regarding travel to the NWT.

Attempts were made to qualify inquiries, at the general information booth, as serious or not. If the inquiry was assessed to qualify as a potential traveller to the NWT a response inquiry card was completed. The customer inquiries then receive a product information mailing containing NWT tourism/travel information regarding their particular interest. The following table displays the number of consumer inquiries received at each of the shows. The reason for the larger number of inquiries for 1987 and 1988 was due to not qualifying inquiries as serious or not. In latter years there was much more stringent qualification.

As well, the 1-800 number is also being used by individuals attending the consumer shows as another source of NWT travel information. Both the Response Inquiry cards and the 1-800 number are recorded and fulfilled through the same source and the figures have been combined. 90% of the inquiries were obtained through the response inquiry cards.

TABLE 1

CONSUMER INQUIRIES RECEIVED BY SHOW IN TH≤ 1991 CONSUMER SHOW PROGRAM

	1987		1988		1989		1990		1991	
	#	%	#	%	#	%	#	%	#	%
Toronto	758	31.7	887	32.5	111	6.0	302	16.5	467	28.8
Anaheim	540	22.6	386	14.2	419	22.8	189	10.3	93	5.7
Chicagoland	–	–	300	11.0	321	17.5	357	19.5	–	–
Chicago All-Canada	–	–	–	–	–	–	112	6.1	51	3.1
Minneapolis North	94	3.9	248	9.1	226	12.3	244	13.3	170	10.4
Minneapolis All-Canada	–	–	–	–	–	–	71	3.9	46	2.8
Phoenix	–	–	241	8.8	–	–	–	–	–	–
Edmonton	435	18.2	188	6.9	88	4.8	90	4.9	79	4.9
Seattle	–	–	158	5.8	151	8.2	111	6.1	82	5.1
Denver	206	8.6	92	3.3	135	7.4	–	–	–	–
Las Vegas	–	–	82	3.4	–	–	–	–	–	–
Dallas	135	–	74	2.7	–	–	–	–	–	–
Calgary	222	–	70	2.6	38	2.1	39	2.1	–	–
Harrisburg	–	–	–	–	144	7.8	158	8.6	–	–
Springfield	1	–	–	–	94	5.1	–	–	–	–
Boston	1	–	–	–	102	5.6	–	–	–	–
San Mateo	1	–	–	–	–	–	55	3.0	135	8.3
Shows Not Specified	1	–	–	–	7	0.4	105	5.7	* 396	24.3
San Francisco	1	–	–	–	–	–	–	–	104	6.4
Total	**2,390**		**2,736**		**1,836**		**1,833**		**1,623**	

* Comprised of inquiries from nine All-Canada Shows (outside of Chicago and Minneapolis), the Today's Senior's Show (28 inquiries) in Toronto, and the International Adventure Travel Show in Chicago (approximately 55 inquiries).

3.4 TEST MARKETS

Prior to incorporating a consumer show into the **Program**, if there is little information on the show but it is thought to have good potential for the **NWT**, a test market will be conducted. In 1991, two shows were attended by the Program Coordinator in order to determine if they should be included in the Program in the future.

3.4.1- International Adventure Travel Show - January 4-6,1991

The International Adventure Travel Show – Chicago, Illinois, was produced for the first time in 1991. Only non-consumptive products were exhibited and included exotic and diverse travel options such as bird watching in Belize; bike trips through Asia or South America; skiing the Tasmanian ice cap; whale watching off California; New Zealand walkabout; sea kayaking in Alaska or the Apostle Islands; or a tour of the past in Egypt. A total of 126 destinations and outdoor products were exhibited.

Although weather conditions were poor in the Illinois state during the three day show, consumers still traveled great distances to attend (as noted when qualifying the consumer at the general information booth). Clientele varied considerably from the hook and bullet audience with the majority of inquiries being well educated and knowing where the Northwest Territories is located. A number of visitors to the booth had traveled at one time to the **NWT** to enjoy activities such as wildlife viewing at a naturalist lodge or excursions to the north pole. A total of 5,900 consumers and travel agents attended the three day show. A total of 61 qualified inquires were generated at the general information booth.

In the past, particular emphasis has been placed on the traditional markets of fishing, hunting and downhill skiing in the Chicago region. These old and well established hard adventure segments have been well worked by all the Canadian provinces and territories since the mid-sixties. To this day, Chicago is still host to one of the largest Outdoor/Hunting/Fishing and Vacation shows in North America, which is held at O'Hare, Illinois. What has not been tapped in this territory is the tremendous market for high revenue soft adventure programs.

According to projections by the Canadian Consulate in Chicago, Canadian suppliers with adventure products would be wise to zero in on the Chicago market. Fueled by demographic changes that indicate a younger group travel market and increasing disposable income among seniors, tour operators are expanding the marketplace. Experiential tours, incorporating sports activities and special-interest trips, and "soft adventure" trips are some of the key features travel agents can expect in the marketplace over the next few years.

Based on the potential in the Chicago market for promoting non-consumptive products and the quality of consumers in attendance at the International Adventure Travel Show, it is recommended that the NWT take out space in the show in 1S92 to facilitate NWT tourism operators interested in penetrating the market.

3.4.2- Today's Seniors, March 22,1991- Toronto, Ontario

In order to test the opportunity to tap into the seniors' market, Economic Development and Tourism attended a day long show at the Delta Chelsea in downtown Toronto. The seniors show overlapped with the Toronto Sportsmen's Show so costs were quite low to test the market.

Approximately 10,000 consumers attended from the Toronto area. A total of 46 destinations and products exhibited at the show, representing sun vacations in the Caribbean and U.S.; hotel chains; bus tours throughout Canada; government tourist authorities from Hong Kong, Singapore, Florida and England; airlines; cultural tours in the orient; and other "soft adventure". The Northwest Territories was the only provincial or territorial jurisdiction present.

The general information booth fielded some serious inquires ranging from rafting expeditions to naturalist trips. Clearly a percentage of the consumers were affluent based on information gleaned through qualifying at the NWT booth. Atotalof28inquiries were generated.

Although the show offers some potential to tap into the seniors' market, many felt it was "too cold" in the NWT to enjoy a vacation and were seeking a very soft adventure. The senior consumer tended to collect literature for study later on.

Based on the nature and number of the inquiries generated at the Today's Seniors Show, it is not recommended that the NWT return with space on behalf of the private sector. A general information booth to distribute literature and educate the public would be advisable, however, since the mandate of the Program is to facilitate NWT tourism operators in taking their products to the market, it is not feasible.

3.5 SHOW EVALUATION

The Consumer Show Program has been very effective in improving tourism to the NWT but it is important to keep improving the program. Through evaluation, the Department of Economic Development and Tourism (ED &T) can meet the changing needs of the tourism industry and improve the program's efficiency. Through the surveys completed by the operators weak points in the show program can be improved upon and strong points can be reinforced. Continued evaluation not only helps the program keep up with changing needs but also improves its effectiveness for NWT tourism operators. It also provides a "window" for tourism operators and ED & T to maintain trends and changes in this marketplace for NWT travel products.

The operators attending the Consumer Show Program are asked to complete a survey. The information obtained is as follows:

- A profile of operators attending the show
- A profile of the shows attended
- A rating of the shows previously attended by operators
- An estimate of sales and leads generated at the show
- Rating of the show's sales performance
- Other shows the operators would like to attend
- The best and worst features of the show
- The operators suggestions on how to improve the program

The following sections contain the principal findings from the 1991 Consumer Show Program.

55% of Sales Made by Operators in 1991 Were Made to Non-Canadian Markets

The following table is a profile of the market origins for the 1991 Consumer Show Program participants:

TABLE 2

Geographic Market Origins of Consumer Show Participants

	1991	1990
United States	52%	56%
Canada	37%	33%
Northwest Territories	7%	6%
Europe/Other	3%	3%

Although the percentage of sales that come from the U.S. is down from last year, this market still constitutes the majority of sales made by operators. Continued emphasis on U.S. markets is still very critical to operators.

The Marketing Budget for the Average Consumer Show Participant Has Fallen over $S,000 to $26,906 per Operator

The majority of operators who rely on U.S. markets have large marketing budgets to reach these markets. The Consumer Show Program has helped the operators reduce the cost of attracting distant markets and thus reduces their advertising budgets.

The following table shows a substantial increase in the number of operators with marketing budgets under $25,000. In 1991, 58.6% of the operators had a marketing budget under $25,000, whereas in 1990 only 31.9% of the operators had a marketing budget under $25,000.

TABLE 3

Profile of Operators' Annual Marketing Budgets for 1990,1991

	1990	1991
75,000 and over	4.6%	4.3%
65,001 – 75,000	0.0%	0.0%
55,001 – 65,000	9.1%	0.0%
45,001 – 55,000	4.6940	6.5%
35,001 – 45,000	13.6%	13.0%
25,001 – 35,000	36.4%	17.4%
15,001 – 25,000	4.6%	23.9%
5,001 – 15,000	22.7%	34.7%
5,000 and under	4.6%	0.0%
Total	**100%**	**100%**

Attendance at 6 Out of 10 Trade Shows was Down

The overall attendance figures for 1991 appear to have dropped slightly from 1990. Two of the shows that went up in attendance were Minneapolis Northwest and Anaheim. People attending these shows said that the attendance figures may have been exaggerated somewhat.

The operators attending the Anaheim show said that attendance was actually down and that the show was "pathetically" slow. The Minneapolis show was also reportedly slow due to a heat wave that accompanied the trade show. The drop in attendance at the Toronto show may reflect the current Canadian recession that is being especially felt in Toronto.

TABLE 4

Trade Show Attendance

	1987	1988	1989	1990	1991
Anaheim	211,000	214,000	215,000	216,000	220,320
Chicago All-Canada	N/A	N/A	10,050	11,200	9,100
Minneapolis All-Canada	N/A	N/A	3,573	5,100	4,500
Seattle	N/A	38,600	40,000	42,000	40,320
San Mateo	N/A	N/A	39,800	39,800	39,195
Edmonton	36,500	28,808	36,497	42,000	36,552
Toronto	221,010	22&486	185,000	193,585	148,382
Minneapolis	N/A	226,028	198,362	133,702	* 205,134
San Francisco	N/A	N/A	N/A	* 14,500	15,900

Tourism/Vacation Fishing Resorts is the Largest Component of the Exhibit Product Mix Overall

Table 5 describes the exhibit product mix for the 1991 Consumer Trade Shows. Minneapolis Northwest, Toronto, San Francisco and Anaheim all have strong tourism/fishing components although tourism/fishing was present at all shows. Edmonton had an overall product mix but Seattle was mainly tackle.

TABLE 5
Exhibit Product Mix

	Tourism/ Vacation Fishing Resort	Tackle	Boats	Hunting	Equipment/ Other
Minneapolis Northwest	**68.6**	31.4	0.0	1.6	0.0
Toronto	**52.7**	12.7	10.1	2.5	22.0
San Francisco	**60.0**	10.0	10.0	10.0	10.0
Anaheim	**58.3**	41.7	0.0	0.0	0.0
Seattle	**22.7**	49.5	6.7	21.1	0.0
Edmonton	**22.1**	27.4	18.5	0.0	31.9

The operators participating in the 1991 Consumer Show Program were also asked to describe what they felt the main interests were of persons attending the shows A general description of each show was drawn from the operators comments and is described in the following section.

The following table presents a summary profile of the NWT Operator's assessment of show visitor interests.

ANALYSIS OF CONSUMERS ATTENDING SHOWS

Anaheim - General Interest/Touring/Sportfishing

The Anaheim market is largely interested in general touring. Due to the NWT's persistence in this market the people attending the show are becoming more familiar with the product, especially fishing. The people attending the show are usually generally interest, sport fishing or people who own RVS and are looking for travel destinations. Operators whose packages include flights do not do as well here but other operators (mainly sport fishing) have done well at the show and could possibly do better.

TABLE 6
OPERATOR ASSESSMENT OF SHOW VISITOR INTERESTS

Operator Assessment of Interests	Sport Fishing				Sport Hunting				Outdoor Adventure			
	91	90	89	88	91	90	89	88	91	90	89	88
Ail Shows	32.4	32.3	4.0	42.5	10.7	21.0	12.7	20.0	23.4	14.5	20.0	32.5
Anaheim	2$.6	0.0	0.0	45.5	0.0	0.0	14.3	27.3	14.2	20.0	0.0	18.2
Chicago Ail-Canada	33.3	60.0			33.3	40.0	–		33.3	0.0	–	-
Seattle	60.0	33.0	42.9	40.0	20.0	33.0	14.3	20.0	0.0	11.0	28.6	30.0
Minneapolis North	50.0	40.0	100.0	0.0	12.5	40.0	0.0	0.0	37.5	20.0	0.0	0.0
San Francisco	0.0	–			0.0	–	–		52.9	-	–	–
San Mateo	33.3	100.0			17.0	-	–		0.0	–	-	-
Edmonton	2$.6	15.0	33.3	0.0	14.3	0.0	0.0	33.3	14.3	15.0	33.3	0.0
Toronto	33.3	20.0	50.0	0.0	0.0	10.0	25.0	0.0	33.3	30.0	0.0	0.0
Minneapolis All-Canada	10.0	-							10.0	-	–	-

Operator Assessment of Interests	General Interest				General Touring				Don't Know			
	91	90	89	88	91	90	89	88	91	90	89	88
All Shows	14.5	16.1	18.2	5.0	17.7	14.5	7.5	0.0		1.6	1.8	0.0
Anaheim	14.2	20.0	42.9	9.0	42.6	60.0	28.6	0.9		0.0	14.3	0.0
Chicago Ail-Canada	0.0	0.0			0.0	0.0				0.0	-	-
Seattle	0.0	23.0	14.3	10.0	20.0	0.0	0.0	0.0		0.0	0.0	0.0
Minneapolis North	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0
San Francisco	35.3				11.8	-						
San Mateo	17.0				33.3	–						
Edmonton	43.0	15.0	0.0	0.0	0.0	40.0	0.0	0.0		15.0	0.0	0.0
Toronto	20.8	30.0	12.5	0.0	12.5	10.0	12.5	0.0		0.0	0.0	0.0
Minneapolis Ail-Canada	60.0				10.0	-						

Seattle - Sport Fishing

The Seattle market seems to demand mainly sport fishing products (both fresh and salt water) along with some hunting and general touring. The demand for NWT products has been declining since 1989 while the attendance figures have remained the same. Although this is largely a sport fishing market only 1 out of 5 operators from NWT offered fishing. This may be one of the reasons for the decline in NWT operator sales. Adventure packages do better at this show than other products. The show is declining in sales but it has done well in the past and with some adjustments could do well again. These adjustments could include making sure that the NWT operators at the show have products that match the interests of persons attending the show.

Minneapolis Northwest - Sportfishing/Outdoor Adventure

The majority of the people attending this show were interested in sportfishing, outdoor adventure or hunting. Since fishing was the largest interest operators offering packages offering this product did quite well. Operators that offered outdoor adventure packages and hunting also had reasonable success with their products. Packages including flights did not do as well. For most of the operators at the Minneapolis show it was an above average show.

San Francisco - Outdoor Adventure

The main interest of people attending the San Francisco show was outdoor adventure. The NWT products were quite popular especially considering that this was a first time for NWT operators' participation at the show. Operators offering outdoor adventure packages did very well.

San Mateo - Sport Fishing/General Touring

San Mateo attracts a market that is mainly interested in sport fishing or general touring. Although the operators did not rate this show very high, it is only the second year this show has been attended by operators and it did record an improvement over last year.

Edmonton - Broad Base of Interest

The Edmonton show attracts people of all interests with the exception of general touring. Although the people at the show had a large variety of interests not all the operators were successful. One operator, with a well established fishing lodge product, did extremely well at the show. One other operator did well with an air charter/boating product. The other operators who carried a variety of products had only minimal success.

Toronto - Broad Base of Interests

Sport fishing and outdoor adventure are the two main interests at the Toronto Show. However all interests were represented by the people attending the show. The majority of operators at the show were quite successful in selling their products. The Toronto show had the most NWT operators of any show attended this year with 12. The large amount of NWT operators did not hurt sales, 8 out of 11 operators enjoyed above average sales. All of the NWT products represented enjoyed reasonably good success but fishing sold the best of all the products.

Minneapolis All-Canada - General Interest

The majority of people attending the Minneapolis All-Canada show were general interest. The people who did have specific interests were evenly spread amongst hunting, fishing, outdoor adventure and general touring. The results from the show are not spectacular but they are up from last year and this is only the second year of attendance at the show. The results from this show should improve as familiarity with NWT products grow.

Chicago All-Canada - Fishing/Hunting/Adventure

The three main interests at the Chicago show were sport fishing, sport hunting and outdoor adventure. The people were evenly interested in all three areas. The operator who did extremely well at this show offered air charter flights and rental boats. Packages and fishing lodges did not do as well at this show.

Of the Shows Described Previously San Francisco is the Best Marketplace for Non-Consumptive Wilderness Products

The majority of shows contain markets for consumptive wilderness products. Some of the shows do contain non-consumptive components such as Toronto and Edmonton but the San Francisco market has a majority of non-consumptive consumers.

Of Shows Previously Attended Toronto and Minneapolis Northwest Were Rated as the Best Sales Vehicles

In the survey operators were asked to name the shows they had attended in the past. The results of this question are given in Table 7.

TABLE 7

Operator Rankings on Shows Previously Attended

Show	# of Mentions	% Rating Good-Excellent
Anaheim	7	14%
Toronto	6	100%
Seattle	6	0.0%
Salt Lake	4	2s%
Minneapolis (North)	4	75%
Denver	4	0.0%0
Billings	3	33.3%
San Mateo	3	333%
Chicago	3	33.3%
Chicago (All-Canada)	3	333%
Banff	2	100%
Reno	2	100%
Boston	2	0.0%
Edmonton	2	50%
Calgary	1	
Rocky Mountain	1	
Fawna	1	
Shot Show	1	
Berlin	1	
London	1	
Frankfurt	1	
Rendezvous (Canada)	1	
Minnesota Canoe Event	1	
Des Moines	1	
Dallas	1	
Los Angeles	1	
Toronto (All-Canada)	1	
Madison	1	
Toronto (Leisure)	1	
Harrisburg	1	
Phoenix	1	
Long Beach	1	
Detroit	1	
Sacramento	1	

Toronto and Minneapolis were rated as the best sales vehicles as they were in 1990.

Although 1991 Was the First Year San Francisco was Included in the Show Program, It Was Rated as One of the Best Sales Vehicles

Operators felt that San Francisco, Toronto, Anaheim and Minneapolis Northwest had the best sales potential. The overall rating sales potential for 1991 was 41.8% which was better last year, slightly higher than the 1990 Show Program at 40.8%. This information is displayed in Table 8.

TABLE 8

Operator Ranking of Show Potential

% Ranking - Good-Excellent	91	90	89	88
San Francisco	75.0	–	–	
Toronto	72.7	62.5	66.7	100.0
Anaheim	66.6	50.0	77.8	50.0
Minneapolis (Northwest)	66.6	100.0	66.7	75.0
Chicago (All-Canada)	50.0	66.7		
Edmonton	28.6	33.3	100.0	
Seattle	16.6	33.3	50.0	60.0
San Mateo	0.0	50.0		–
Minneapolis (All-Canada)	0.0	33.3		
All Shows	41.8	40.8		–

% Ranking - Average-Poor	91	90	89	88
San Francisco	25.0		–	
Toronto	27.3	37.5	22.3	0.0
Anaheim	33.4	50.0		–
Minneapolis (Northwest)	33.4	00	35.3	25.0
Chicago (All-Canada)	50.0	33.3		
Edmonton	7.14	67.7	0.0	
Seattle	83.4	67.7	50.0	40.0
San Mateo	100.0	50.0	–	–
Minneapolis (All-Canada)	100.0	67.7		

Table 9 is the average ranking of good-excellent for the last four years. Traditionally Toronto and Minneapolis have been rated the best overall for sales performance but this year San Francisco's first yearwas very good andit mayalso become one of the sales leaders.

TABLE 9

Comparative Rating

Consumer Shows Attended 198S-1991

Show	Rating of Show % Good-Excellent
Minneapolis (Northwest)	77.1%
Toronto	75.4%
San Francisco	75.0%
Anaheim	61.1%
Chicago (All-Canada)	58.3%
Edmonton	53.9%
Seattle	39.9%
San Mateo	25.0%
Minneapolis (All-Canada)	16.7%

Toronto Was the Most Successful Show in Terms of Sales for the Third Year in a Row

In Table 10 direct sales and leads for 1991 are presented with 1990,1989 and 1988 years included to better understand the long term trends of various shows.

In 1991 Toronto was once again the highest producing show as far as sales but it was nowhere near as successful as last year. San Francisco was by far the most successful show at producing leads; 800 of the leads for all the shows were produced by two companies at the San Francisco show alone. There seems to be a reverse correlation between the number of sales and the number of leads – when sales are down leads go up.

TABLE 10

Direct Sales and Leads Made at Consumer Shows

DIRECT SALES	1991		1990		1989		1988	
	#	%	#	%	#	%	#	%
Toronto	58	33.5	282	69.8	49	26.5	16	6.3
Minneapolis (Northwest)	34	19.6	15	3.7	37	20.0	79	31.5
Edmonton	25	24.5	35	8.7	21	11.4	7	29
Chicago (All-Canada)	15	8.7	16	4.0				
San Francisco	14	8.1						
Seattle	10	5.8	17	4.2	20	10.8	10	4.0
San Mateo	8	4.6	6	1.5				
Minneapolis (All-Canada)	6	3.4	2	.5				
Anaheim	3	1.7	14	3.5	10	5.4	73	29.1
Shows Not Listed			17	4.2	48	25.9	66	26.2
Total	173	100.0	404	100.0	18s	100.0	251	100.0

DIRECT LEADS	1991		1990		1989		1988	
	#	%	#	%	#	%	#	%
Toronto	562	24.4	354	26.8	325	17.4	75	5.8
Minneapolis (Northwest)	276	9.4	228	17.3	334	17.9	152	11.2
Edmonton	137	6.0	130	9.8	60	3.2	27	29
Chicago (All-Canada)	40	1.7	69	5.1	-	-	-	-
San Francisco	1,003	43.7	-	-	-	-	-	-
Seattle	84	3.7	160	121	179	9.6	37	2.9
San Mateo	54	2.3	10	.8	-	-	–	-
Minneapolis (All-Canada)	135	5.9	24	1.8	-	-	-	-
Anaheim	65	2.8	178	13.5	370	19.8	387	30.0
Shows Not Listed			168	127	600	321	604	46.7
Total	2,296	100.0	1,321	100.0	1,868	100.0	1,292	100.0

Table 11 has been compiled to show the average success of operators at each show. The Chicago show only had two operators attend the show. Of the two operators only one reported their sales and leads and this is the reason for the high average at the Chicago AU-Canada Show. Chicago AU-Canada had the highest average sales of **all** the shows followed by Minneapolis Northwest and Toronto respectively.

TABLE 11

Average Sales and Leads/Operator

During 1989,1990,1991 Consumer Show Program

Show Program	**Average Sales**			**Average Leads**		
	90	**91**	**89**	**91**	**90**	**89**
Chicago (All-Canada)	* 15	5.3		40	23.0	-
Minneapolis (Northwest)	5.7	7.5	7.4	36	114.0	66.8
Toronto	4.8	35.3	7.0	46.8	44.3	46.4
Edmonton.	4.1	5.8	5.3	22.8	21.7	15.0
San Mateo	2.7	–		18	–	-
Minneapolis (AU– Canada)	2	.7		45	8	–
Seattle	1.7	2.8	3.3	14	26.7	29.8
San Francisco	1.5	–		125.4	–	–
Anaheim	1	4.7	1.1	21.7	17.5	48.7
All Shows Average	3.8	6.8	3.9	52.2	35	39.2

* Only 2 people attended the Chicago All-Canada Show and only one operator reported sales and leads.

Certain Factors Make Some Operators More Successful than Others

Some of the key factors that determine the success of individual operators at shows have been listed in the next section.

1. Product

The product that is offered must always be in the right market for that product. Non-consumptive wilderness operators such as Whitewolf Adventure Expeditions sell very poorly in some markets but very well in others. In Anaheim and Seattle there is little market for non-consumptive products and Whitewolf did quite poorly but in Toronto and San Francisco which have markets for non-consumptive wilderness products Whitewolf did quite well.

2. Previous Trade Show Experience

Operators who attend shows in successful years increase market familiarity with their product and encourage second time buyers. Operators who attend shows for the first time cannot expect immediate success but should attend a show for at least three years before expecting results.

3. General Trade Show Experience

Having experience in being at trade shows also helps to be successful in other trade shows. Knowing how to attract customers and knowing which customers are serious and should be followed up comes with working previous trade shows. Also more subtle "tricks of the trade" are learned with years of attending various trade shows.

4. Selecting the Right Shows to Attend

The best shows to attend for 1991 were Chicago (All-Canada), Minneapolis Northwest, Toronto and Edmonton respectively. These shows had the best results for individual operators. Operators attending these shows with the right product should expect above average results.

A summarization of what products performed well at certain shows is provided in Table 12.

81% of Operators Surveyed Would Attend the Same Shows Again

Part of the survey that all operators participated in posed the question if the operators would participate in the same show again next year. On the average 81.1% of the operators said they would attend the same show the next year - this is 3.4% better than 1990. Table 13 gives the figures for each show and the percentage of people that would return to the show.

TABLE 12

NWT Products That Have Performed Well at Consumer Shows

Chicago **(All-Canada)** –	• **Air** Charter Flights • Rental Boats
Seattle	• Adventure Packages
Minneapolis Northwest –	• **Lodges** • **Hunting** • Fishing • Naturalist/Photography
San Francisco	• Non-consumptive Products • Adventure Packages • Rafting and Canoeing • Air Charter Flights
San Mateo	• Adventure Packages
Edmonton –	• **Lodges** • **Air Charter Flights** • **Boats/Floats** • **Non-Consumptive Products**
Toronto –	• **Rafting and Canoeing** • **Air Charter Flights** • Adventure Packages • Non-consumptive Products

TABLE 13

Percentage of Operators Who Would Attend the Same 1990 Show Again in 1991

Chicago (All-Canada)	100%
Minneapolis ((Northwest)	100%
Minneapolis (Ail-Canada)	100%
Toronto	91.6%
San Francisco	88.8%
Anaheim	75.0%
Seattle	66.6%
San Mateo	66.6%
Edmonton	50.0%
AU Shows – 1991	81.1%
All Shows – 1990	77.7%

Chicago Was the Show Chosen Most Often When the Operators Were Asked What Shows They Would Like to Attend in the Coming Year

The suggestions for shows to attend in the coming year include shows that are in the program and some shows that are not. Of the shows chosen that are in the program already Chicago (All-Canada), San Francisco, Minnesota (All-Canada) and Toronto were mentioned most often. All Canadian shows are still favorites. Dixon Road and Sacramento were the shows most mentioned that were not already included in the program.

The Majority of Operators Involved in the 1991 Consumer Show Program Were Quite Satisfied

Table 15 shows the responses of operators who were asked what the best and worst feature of the shows were and what improvements they thought could be made. The majority of operators felt there were no features of the program that were bad or could be improved upon.

TABLE 14

Operator Suggestions for Inclusion in the Consumer Show Program

Show	Number of Mentions
Chicago (All-Canada)	14
San Francisco	11
Minneapolis (All-Canada)	10
Toronto	8
Dixon Road	4
Sacramento	4
Edmonton	3
San Antonio	3
Cleveland	3
Houston	3
New Orleans	3
Salt Lake City	2
Anaheim	2
Banff	2
Seattle	1
All Canadian Shows	1
Valley Forge	1
Fargo, N.D.	2
Elk Foundation	1
Des Moines	1
Los Angeles	1
Frankfurt	1
Rendezvous	1
Boston	1
Miami	1
Dallas	1
Calgary	1
Red Deer	1
Denver	1
Green Bay	1

Of the best features in the program, 18 operators felt that the financial assistance was the best feature. Many operators also felt that organization was the best feature. The solid presence of NWT at the shows was the third best feature. However, five of the operators listed felt that the booths being clustered together was one of the shows' worst features. The shows helped many operators reach markets they would have not been able to reach otherwise. This explains why the fourth most mentioned best feature was reaching new markets.

The majority of operators could not think of a worst feature to list. Five of the operators felt that the booths were too close and this hurt their business. Two operators also felt that the booths were too far apart. The placement of the booths cannot satisfy everyone.

The most mentioned improvement to the show was pre-show public relations. Six of the operators felt that if the consumers were more informed of the presence of the NWT operators before the show this would go a long way to help business. One of the more interesting improvements suggested was that of an All Canadian Village that would group not only NWT operators but Canadian operators to provide a total touring picture of Canada.

TABLE 15

SHOW PARTICIPANT COMMENTS ON BEST/WORST FEATURES AND SUGGESTED IMPROVEMENTS

	Anaheim	Chicago	Seattle	Minn. N.W.	San Francisco	San Mateo	Edm.	Toronto	Minn. A-C	Total
BEST FEATURES										
Displays	1					1		2		4
Financial Assistance	1			2	4	2	3	5	1	18
Location	1			1	2		2			6
Marketing	1	1	1					1	1	5
Organization		1	3		1		3	3	1	12
New Market		1	1	1	1			1	1	7
Pre Show P.R.				1			1			2
Solid NWT Presence		1			5		1	1		8
WORST FEATURES										
Long Hours	1					1		1		3
None	2	2	5	5	4	2	2	5	2	29
More Funding				1						1
No Complete Cdn. Image					1					1
Booths Too Close					2		1	1	1	5
Too Distant to Travel					1					1
Show Was Too Short					1					1
Wrong Market for Produc			1		1		1			3
No Pre Show P.R.							1			1
Booths Too Far Apart								2		2
Show Too Large								1		1
IMPROVEMENTS										
Shorter Hours	1							1		2
NWT Representative Attend	1									1
More Shows										
Go to All-Canada Shows		1								1
More Pre-Show P.R.			1	1			1	4		6
Go to Different Shows			1		2		1			4
More Funding			1	1						2
None	1	1	3	4	4	3	3	6	2	27
All-Canadian Village					1					1
Large Map of N. America					1					1
Meeting of Operators During Show					1			1		2
Not Group Operators							1	2		3
Group Operators								1	1	2
Seminar for Booth Operators								1		1

3.6 COST/BENEFIT ASSESSMENT OF CONSUMER SHOW PROGRAM

The following table is a calculation of the projected sales **from** the 1991 Consumer Show Program. The calculation includes the direct sales generated **from** the shows, the leads after a conversion rate of 10% is applied and the telephone inquiries after a conversion rate of 4910 is applied. Leads generated at shows are considered more serious than telephone inquiries and thus the higher conversion rate.

TABLE 16

Estimate of Sales Conversion for the 1991 Consumer Show Program

	Number	Conversion Factor	1991	1990	1989	1988
Operator Sales	173	100%	173	404	185	313
Consumer Leads	2296	10.0%	229.6	132.1	86.8	129.2
Consumer Card and Telephone Inquiries	1623	4.0%	64.9	73.3	82.6	115.6
Total	**4092**		**467.5**	**609.4**	**454.6**	**557.8**

The result of the 1991 Consumer Show ...m is 467 trips to the **NWT.** This is a drop over last year's figures by 30.3% ho... it is still an increase over 1989. The program may have dropped statistically from last year but it was still reasonably successful.

Table 17 represents an estimate of projected tourism expenditure that will result from the 1991 Consumer Show Program.

TABLE 17

Cost/Benefit of 1991 Consumer Show Program

Projected Visitor Expenditure *	$500,281.10
Program Cost	163,800.00
Net Program Benefit	$336,481.10

•Based on 467.5 visitors at an average expenditure of $1,070.12 per trip. Average expenditure is based on a 1989 Study prepared by ACRES INTERNATIONAL LTD. that stated 55,651 people visited NWT and they spent $53,700,000 which is $%4.94 per visitor in 1989 dollars. To arrive at 1991 average expenditure per visitor the $%4.94 was multiplied by the CPI of 1.109 (964.84 x 1.109 = $1,070.12).

The net program benefit is $336,481 .10 for the 1991 Consumer Show Program. This is based upon a conservative estimate of $1,070.12 per visitor to NWT. The average trip expenditure is based upon all trips made to NWT in 1991. The trips sold by the operators in the Consumer Show Program are on the average more expensive than other trips.[1] As a result the projected visitor expenditure of $500,281.10 is actually quite conservative and it understates the tourism expenditure impact of the program. Even with the benefit of the program being underestimated the amount invested has shown a net return. The 1991 Consumer Show Program has, as in years past, proven to be successful.

[1] As an example, the average cost of packages sold by tourism operators who attended consumer presentations at Boston and Toronto was between $2,100 and $2,200 per person.

4.0 CONCLUSIONS AND RECOMMENDATIONS

1. A General North American Recession Affected the 1990 Consumer Show Program's Performance

The results of the 1991 Consumer Show Program were considerably down from the 1990 Program. The projected sales conversion for the 1991 Program was down by 23%. In fact the number of direct sales made at the shows were the lowest yet since 1988. However the number of leads generated by the **Program,** largely due to the inclusion of the San Francisco show, were up considerably from previous years. This resulted in the 1991 Show Program performing somewhat better than 1989.

The principal reason that can be contributed to the Show's poorer performance is a general North American-wide recession as well as other factors such as the Gulf Crisis which prompted a "travel scare".

This was particularly true in the case of the Toronto Show where direct sales made at the show fell from 282 in 1990 to only 58 in 1991.

2. Toronto and Minneapolis Continue to be the Program's Top Producers

As shown in the following table, the Toronto and Minneapolis Shows have consistently been the Program's top producers in terms of direct sales made at shows.

TABLE 18

Percentage of Total Consumer Show Program Direct Sales Accounted for by the Toronto and Minneapolis Shows

Direct Sales	1991	1990	1989	1988
Toronto/Minneapolis Shows	53.1%	73.5%	46.5%	37.8%
All Other Show Programs	46.9%	26.5%	43.5%	62.2%

3. San Francisco Was a Very Positive Addition to the 1991 Consumer Show Program

The 1991 Consumer Show Program included San Francisco for the first time. The show performed very well and 75% of the operators who attended the show ranked it good to excellent. It generated a substantial number of leads for operators. In fact, for a first time appearance in the Consumer Show Program, it experienced one of the best performances of any show to date. This is particularly encouraging given the overall performance of the 1991 Program.

4. The Performance of the Anaheim and Seattle Shows Continues to Deteriorate

The performance of the Anaheim and Seattle shows is in contrast to the performance of the Toronto and Minneapolis Shows, with the latter showing consistent improvement and the former showing consistently poorer performance. In particular, Anaheim has been especially disappointing as shown in the following table.

TABLE 19

Historical Performance of Anaheim and Seattle Shows - Sales and Leads Generated

	1991		1990		1989		1988	
DIRECT SALES	**#**	**% of Total Program**	**#**	**% of Total Program**	**#**	**% of Total Program**	**#**	**% of Total Program**
Anaheim	3	1.7%	14	3.5%	10	5.4%	73	29.1%
Seattle	10	5.8%	17	4.2%	20	10.8%	10	4.0%
LEADS								
Anaheim	65	2.8%	178	13.570	370	19.8%	387	30.0%
Seattle	84	3.7%	160	12.1%	179	9.6%	37	2.9%

Anaheim's performance has consistently deteriorated since its inclusion to the Program in 1988. This show should be included in the 1992 program, but if performance does not improve over 1991 it should be dropped, particularly in light of San Francisco's promising startin 1991. In **Seattle's case more** attention should be paid to "qualifying" operators who attend the show. This show is attended largely by persons interested in **sportfishing.** As a result the majority of operators attending this show should have **sportfishing** as their primary product offering.

APPENDIX A

Operators Who Attended
1991 Consumer Show Program

APPENDIX A

OPERATORS WHO AITENDED
1991 CONSUMER SHOW PROGRAM

Anaheim

- Arctic Cooperators Ltd.
- Arctic Fishing Lodge and Outfitters
- Nahanni Mountain Lodge
- Whitewolf Adventure Expeditions Ltd.

Chicago - All-Canada

- True North Safaris
- Venture Air/Venture Arctic Outfitters

Seattle

- Adventure Northwest
- Arctic Safaris
- Nahanni Mountain/Simpson Air
- Plummer's Lodge
- True North Safaris
- Venture Air/Venture Arctic Outfitters
- Whitewolf Adventure Expeditions

Minneapolis Northwest

- Arctic Safaris
- East Wind Outfitters
- Ferguson Lake Lodge
- MacKenzie River Expeditions
- Nahanni Mountain Lodge/Simpson Air
- Peterson Pt. Lake Camp

San Francisco

- Arctic Fishing Lodge and Outfitters
- Blackfeather
- East Wind Outfitters
- Frontiers North/Sila Lodge
- Nahanni River Adventures
- Subarctic Wilderness Adventures
- Venture Air/Venture Arctic Outfitters
- Western Arctic Nature Tours
- Whitewolf Adventure Expeditions

San Mateo

- Adventure Northwest
- Arctic Fishing Lodge and Outfitters
- Kasba Lake Lodge

Edmonton

- Arctic Tour Co.
- Blachford Lake Lodge
- Frontier Fishing Lodge
- Nahanni Mountain Lodge/Simpson Air
- Nahanni River Adventures
- Plummer's Lodge
- Venture Air/Venture Arctic Outfitters

Toronto

- Adventure Northwest
- Arctic Cooperators/Im's North
- Arctic Tour Co.
- Bathurst Inlet Lodge
- Canada North Outfitting
- East Wind Outfitters
- Ferguson Lake Lodge
- Frontier Fishing Lodge
- Nahanni Mountain Lodge/Simpson Air
- Nahanni Wilderness Adventures
- Peterson's Pt. Lake Camp
- Whitewolf Adventure Expeditions

Minneapolis - All-Canada

- Blachford Mountain Lodge
- East Wind Arctic Tours
- Frontier Fishing Lodge
- True North Safaris

APPENDIX B

Consumer Show Program
Sponsored Presentations – 1991

APPENDIX B

Consumer Show Program Sponsored Presentations

1991

1.0 Objective

To show-case Northwest Territories(NWT) tourism products in order to make contact with the travel trade, media, special interest groups and consumers.

2.0 Background

In 1988 the Tourism Industry Association of the Northwest Territories(TIANWT) entered into a service contract with the Department of Economic Development and Tourism (ED&T) to hold receptions in conjunction with consumer shows. The receptions would provide a venue for operators to make contact with the travel trade, local media and special interest groups in order to increase visitation to the NWT. To this end receptions were hosted in Chicago, Seattle, Toronto and Minneapolis. All NWT operators, including those attending the shows on their own, were invited to participate. With the exception of Toronto, the receptions were held at the Canadian Consulates.

Invitation lists were developed through the Canadian Consulates, ED&T, the public relations firm - Hill & Knowlton, and TIANWT. The TIANWT with assistance from the Canadian Consulates, Advance Planning and ED&T, co-ordinated the receptions.

Receptions were conducted in the evenings (approximately two hours duration) commencing with a brief welcome from both ED&T and the TIANWT, the viewing of the Emerging North video used at Expo '86, an introduction of the tourism operators present, followed by interaction between guests and the NWT participants.

In 1989 a service contract was signed with ED&T to co-ordinate presentations in Harrisburg, PA, and two in Seattle, WA. Through operator input, the Canadian Consulate in Seattle and the TIANWT it was decided a more direct sales approach should be employed using professional guest speakers to convey the message of the NWT. The format was changed to host breakfast functions with a Master of Ceremonies introducing the NWT and subsequently the guest speaker who conducted slide or video presentations.

Invitation lists were developed through the Canadian Consulates, Treeline Planning Services and various sporting organizations and clubs.

A number of agreements were initiated between participating operators, the TIANWT and various trade and media contacts. Several print and electronic interviews were secured. An evaluation of the presentations was undertaken.

In 1990, based on operator evaluations, ED&T sponsored presentations in Chicago, Seattle, and Toronto. In order to avoid conflict with show hours, breakfast presentations were co-ordinated in Seattle and Toronto and a luncheon presentation was co-ordinated in Chicago.

The Canadian Consulates in Chicago and Seattle developed the invitation lists and assisted in coordinating the functions. A more targeted approach was directed at consumers in Chicago and Toronto. The Consulate in Seattle was mandated to work solely with the travel trade and media so no consumers were present.

The same format for the presentations was used as in 1989. Sales were confirmed by 40% of operators attending Chicago and leads were generated by 60%. A number of contacts were established with the travel trade and media in Seattle. Toronto generated a number of leads. It was concluded in the 1990 report that an evening function should be coordinated in Toronto and that more time should be arranged for mingling with guests.

In 1991, due to the restructuring of the TIANWT, ED&T assumed management of the Consumer Show Program and incorporated the presentations within the CSP. In order to make the best use of the limited budget, two key target markets were selected (New England and Toronto) which would provide a venue for the largest number of NWT operators.

3.0 1991 Implementation

3.1 Co-ordination

3.1.1. Identified markets - Two markets were selected which would represent target areas for the greatest number of NWT operators. Wakefield, Mass., a suburb of Boston, was chosen since the Department was unable to find a suitable show venue in the area which would support the many operators who wished to penetrate the New England market or were already promoting their products in this area.

Toronto is a market for most NWT tourism products and based on the potential demonstrated through the 1990 presentation, it was decided to continue with promotions in the area to keep the momentum going.

3.1.2. **Location**

Boston - Through consultation with the Consulate in Boston, an up-scale hotel was selected in Wakefield, Massachusetts, situated in an affluent suburb on a main artery from the downtown core of Boston.

Toronto - The presentation was again hosted at the Four Seasons Hotel in downtown Toronto based on the favorable response from operators in 1990 to this venue.

3.1.3. **Date**

Boston - Wakefield, Mass., February 19, 1991 - Colonial Hilton Hotel
6:00 p.m. to 9:00 p.m.

The presentation was confirmed in mid February to avoid conflict with operators attending sports shows through the Consumer Show Program.

Toronto - Toronto, Ont., March 14, 1991 - Four Seasons Hotel
5:30 p.m. to 9:00 p.m.

In support of operator suggestions in the 1990 evaluation, the presentation was confirmed for the evening prior to the Toronto Sportsmen's show in order not to conflict with show hours and to enable operators to follow-up immediately on contacts made during the presentation.

3.1.4. *Time* - One of the major concerns expressed by operators in the 1990 presentation evaluation was the lack of time to mingle with the guests. Morning presentations did not generate as high a response as luncheon or evening functions. It was concluded in the 1990 evaluation that an evening reception should be coordinated for Toronto. The same was decided for Boston.

3.1.5. Format - A mini-marketplace was organized. Operators were invited to set up displays around the perimeter of the room. Hors d'oeuvres and beverages were served as guests arrived. Guests filled out registration slips which were tallied to determine attendance and to develop mailing lists. The guests were then given the opportunity, for approximately one half hour, to visit operator booths.

A Master of Ceremonies was hired to set the mood, introduce the NWT and the Guest Speaker. The Guest Speaker presented an overview of life in the north in the recent past and in present day. Some tourism opportunities were highlighted. The Master of Ceremonies then preceded to introduce the participating m operators. Door prizes were donated by operators and a draw was held. Once again, guests were invited to visit operators at their booths.

3.1.6. Invitations - A mailing list for Boston was developed through the Canadian Consulate and through participating operators. In addition, an advertisement was placed in the Sunday Boston Globe (appendix 2A) and in the Travel New England trade paper (appendix 2B).

For Toronto, the mailing list was compiled by using the guest list from the 1990 presentation; inquiries generated in 1990 at the Toronto Sportsmen Show; general inquiries through the °800 number from the Toronto area; and through participating operators. In addition, interest in the presentation was generated by promoting the function through sporting goods shops and special interest groups and through advertising in the Globe & Mail (appendix 2c).

3.2. Attendance

Boston, Mass. - 88

Toronto, Ont. - 237

Although registration slips totaled 237, it was believed that closer to 300 actually attended the Toronto presentation[1].

RSVPS for Toronto were accepted through the NWT 800 number office. Reservations were cut off at 280 due to budget constraints. At least 100 interested invitees were unable to attend as a result of the curtailment.

An accurate breakdown of attendance by trade and occupation is not possible as not all guests identified their occupation on the registration slips.

An approximate breakdown of the attendance in Toronto follows (based on response on registration slips) :

Media	12
Travel Trade	21
Special Interest	19

The remaining respondents are either consumers or unknown.

3.3 Sponsorship

Both presentations were greatly enhanced through sponsorship either in the form of transportation to enable a larger number of NWT operators to participate, or through the donation of door prizes which added an element of excitement to the function and provided an opportunity for operators to highlight their businesses.

First Air was a major sponsor of the Boston presentation by providing 11 passes to operators to enable them to attend the function. As well, First Air provided three passes to be given away as door prizes. The Canadian Consulate in Boston sponsored time and expertise. A number of individual operators donated various items for door prizes such as limited edition prints, mugs and t-shirts; and two operators donated tour packages.

[1] Hors d' oeuvres were ordered for 280 guests and chairs were set out for 280. It was noted that many guests had to stand during the presentation and that hors d'oeuvres ran out before every one was able to eat.

For Toronto, Northwest Territorial Airways donated two system wide passes as door prizes. Indirectly Canadian Airlines was a sponsor as well in that they provided the operators with passes to attend the Toronto Sportsmen's show, and as a result, operators were able to participate in the presentation. A number of individual operators donated various items for door prizes such as limited edition prints, hats, mugs, sweatshirts, t-shirts, a paddle, Nahanni portfolio; and two operators donated tour packages.

4.0 Operator Evaluations

In order to determine the effectiveness of the Presentation Program, all participating operators are asked to complete an evaluation questionnaire. The evaluation is an integral part of the process, enabling the Program co-ordinators to determine the benefits of the presentations to the private sector and to ameliorate the Program to enhance the best features.

The following information is requested:

- comments/suggestions with respect to organization of the presentations highlighting: timing (date and time of day); and location
- business potential indicating sales and leads made with media; travel trade; and consumers
- impact of NWT presentation determining effectiveness of the Master of Ceremonies and Guest Speaker
- recommendations and comments including: best features; worst features; suggestions for improvements

The following represents the principal findings of the evaluation.

Operator Response to Evaluations

Boston	12/12 - 100%
Toronto	15/15 - 100%

FIGURE 1

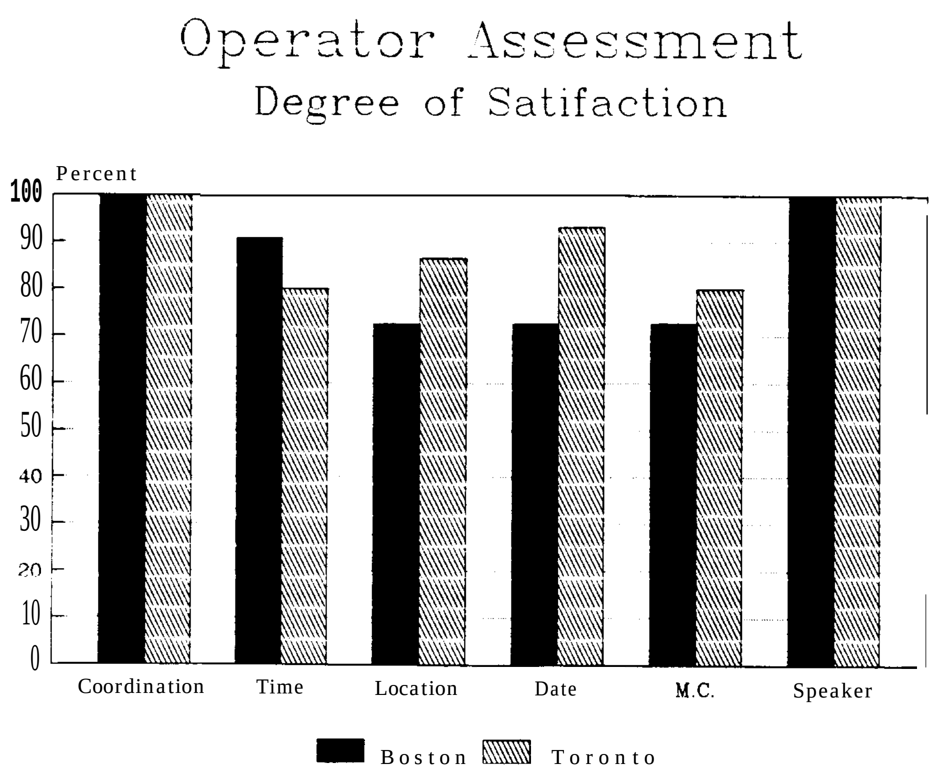
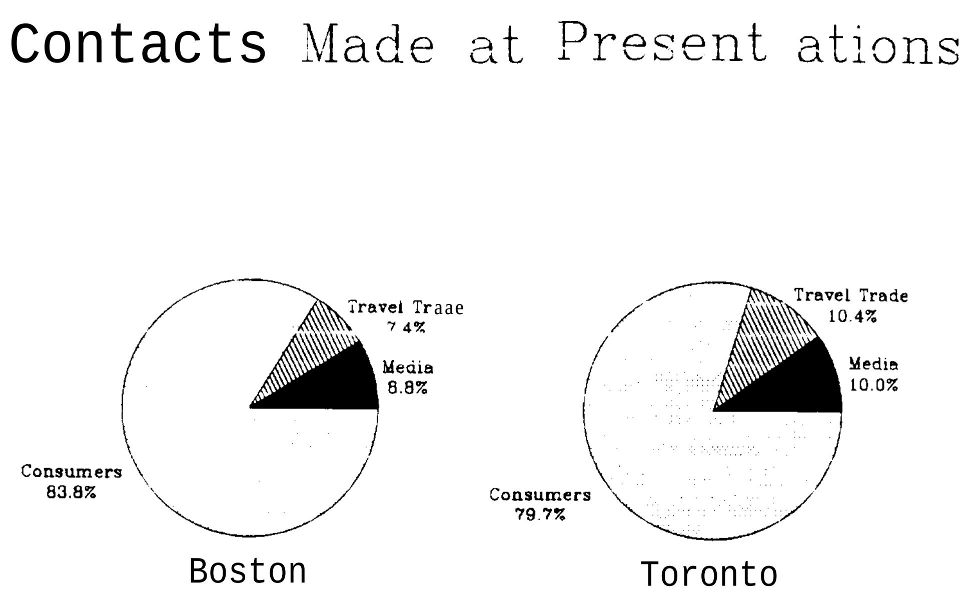


Figure 1 indicates that operators were generally very satisfied with both the Boston and Toronto presentations. There were some doubts as to location and dates chosen for the functions, however, these operators noted they were unfamiliar with the marketplaces and uncertain as to what would work best. Suggestions for changes and improvements are noted in Table 3.

FIGURE 2



The above Figure takes into account the overall number of contacts made at Boston and Toronto and shows a breakdown in percentages as applied to each group of guests present. Below, percentages are based on contacts made per operator.

Boston

- 36. 3% made contact with media. Number of contacts per operator ranged from 1 to 3.
- 27. 3% made contact with travel trade. Number of contacts per operator ranged from 1 to 2.
- 90. 9% made contact with consumers. Number of contacts per operator ranged from 1 to 35.

Toronto

- 73.3% made contact with media. Number of contacts per operator ranged from 1 to 4.
- 66.6% made contact with travel trade. Number of contacts per operator ranged from 1 to 12.
- 100% made contact with consumers. Number of contacts per operator ranged from 1 to 60.

TABLE 1

Best Features as Identified by Participating Operators

Best Features - Boston

o Guest Speaker	5
o Presentation format/display set-up	3
o Consulate assistance	1
o Slide Show	1
o Door prizes	1
o Opportunity to participate	1

Best Features - Toronto

o Guest Speaker/presentation	6
o Good format/display set-up	4
o Quality and potential of guests	3
o Organization	2
o Guests mingling after presentation	2
o Master of Ceremonies	2
o Door Prizes	1
o Turnout	1

Overall operators were pleased with the slide presentation conducted by the guest speaker. Many felt the guest speaker was unbiased and informative in recounting his 40 years of experience in the north as a traveling Anglican bishop and linguist. There are some operators, however, who favor the 'hard sell' approach and would like to see future presentations encompass all regions of the NWT and focus more on tourism.

Table 1 also indicates operator support for the use of visual displays. Displays greatly enhance selling opportunity and clearly distinguish sellers from buyers --- observers.

Three operators noted that the Toronto presentation was successful in attracting qualified guests.

TABLE 2

Worst Features as Identified by Participating Operators

Worst Features - Boston

o Not enough time to talk to people	1
o Nothing to distinguish between media, travel trade and consumers	1
o Food - should use arctic foods	1
o Too many government people	1
o Shortage of space for set-up	1

Worst Features - Toronto

o Shortage of food	4
o Need more time to mingle	3
o Operators need more advance notice	3
o Operators indulging in too much alcohol	3
o Late arrival and set-up by operators	2
o Situation of food in relation to displays (Should be in same room)	1
o Presentation not target specific	1

Shortage of food was noted as a cause for concern in Toronto. Since hors d'oeuvres were ordered for [illegible]30 and only 237 responded on the guest registration slips, the shortage of food reaffirms that closer to 300 were actually present. In addition, operators noted that they required more advance notice of the function in order to better prepare, (i.e. send out invitations, coordinate a better display, attempt to set up media interviews). Other comments included needing more time to mingle with guests to generate interest in their products, and problems with individual operator conduct.

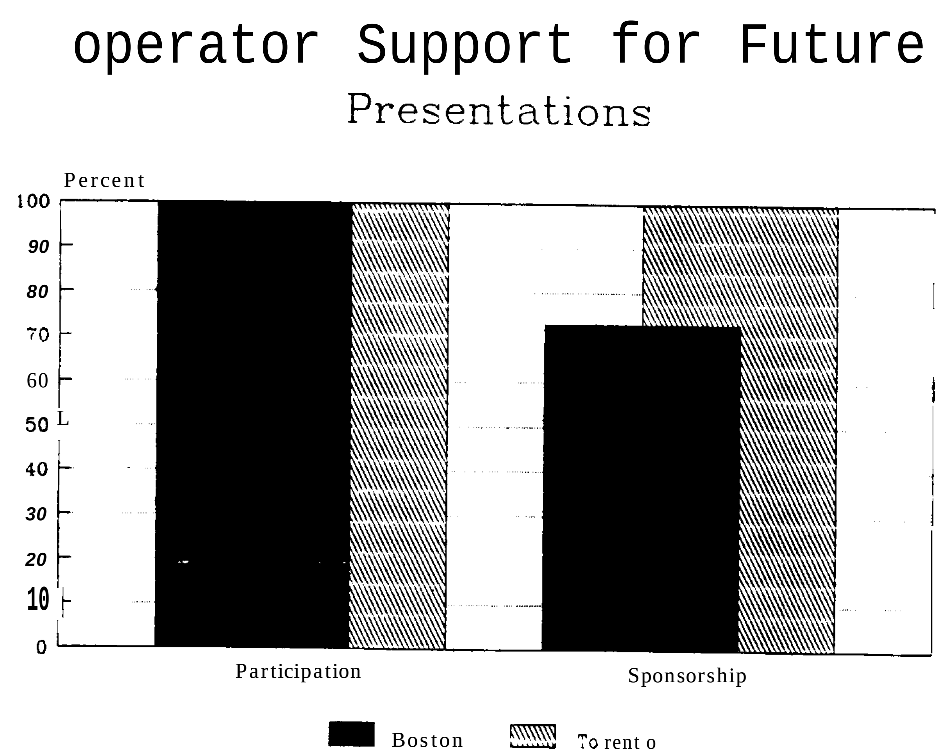
TABLE 3

Operator Suggestion for Improvements to the Presentations

Suggestions - Boston	
o Ensure visual presentation represents all of NWT	2
0 More NWT operators should be involved	2
0 Longer advance notice to generate local media response	1
0 Use guest speaker in advance for media interviews	1
0 Have luncheon, in addition to evening, for travel trade only	1
0 Have M.C. give presentation/tour of NWT products with folksinger interspersing songs about explorers, whaling in the Baffin, musk ox, caribou etc.	1
0 Develop a cadre of possible speakers to do presentations	1
0 Tailor speaker to anticipated audience	1
0 Coordinate presentation for early afternoon or Saturday	1
0 Organize presentation in the fall to capture clients interested in spring activities (eastern arctic)	1
0 Invite more consumers	1
0 Allow more time to meet with guests prior to presentation	1
0 Allocate more set-up space for operator displays	1
Suggestions - Toronto	
o Increase duration and invite travel trade/ media to meet with operators prior to consumers and special interest groups	3
0 Ensure visual presentation represents all of m	3
0 Consider using facilities such as Royal Ontario Museum or Ontario Science Center	2
0 Host day long event with seminars	1
0 Coordinate more presentations using same format	1
0 Host sit down dinner presentation	1
0 Develop a more efficient way to track attendance	1
0 Enable operators to make individual presentations in separate room	1
0 Enhance native element (i.e. carver)	1

Again lack of time to interact with guests is raised as a concern by operators. Suggestions to deal with the situation are to coordinate two separate functions - one for media/travel trade, the second for consumers and special interest groups; or to extend the duration of the function, allotting the first two to three hours for media and travel trade only. It is also suggested that in the future audio/visual presentations are conducted which provide a complete overview of the Northwest Territories.

FIGURE 3



Source

Figure 3 indicates 100% support for future presentations with between 72% and 80% willing to sponsor, either a trip as a door prize or a fee to participate.

TABLE 4

Direct Sales and Leads Generated at Presentations

	Sales	Leads
Boston	0	46[1]
Toronto	21[2]	181[3]

[1]Generated by 81.8% of participating operators - average lead per operator is 5.1.

[2]Generated by 33% of participating operators - average sale per operator is 4.2.

[3]Generated by 93% of participating operators- average lead per operator is 12.9.

It is not possible to determine all the factors that make for individual operator success at the presentations. The following factors have been taken into consideration (and apply individually to operators) however, there is no consistency in the findings[1] :

- o previous experience 'working' shows and like functions;
- o sales experience general;
- o product type;
- o product location;
- o pre-show marketing - operator generated invitations and media;
- o operator display;
- o operator preparedness;
- o cost of product.

One factor which appears to come into play as far as generating results is operator experience in 'working' a function or in direct selling.

[1] i.e. operator A is successful yet does no pre-show marketing whereas operator B undertakes pre-show marketing activities and is not successful; operator A and B are selling similar products)

4.1 Cost/Benefit Assessment of the Presentations

Table 5 indicates actual sales made at the presentations as well as sales leads generated. A conversion ratio of 10% has been applied to the sales leads. This conversion ratio is conservative. According to the National Association of Exposition Managers, in a 1988 Manual compiled for exhibitors, sellers should be converting 50% of the qualified leads obtained at a consumer show or marketplace.

TABLE 5

Estimate of Sales Conversion

Boston	Number	Conversion Factor	Total
Operator Sales	0.0	100.0%	0.0
Operator Leads	46.0	10.0%	4.6
Total	46.0		4.6

Toronto	Number	Conversion Factor	Total
Operator Sales	21.0	100.0%	21.0
Operator Leads	181.0	~o.q-	18.1
Total	202.1		39.1

As a result, the Boston presentation will generate 4.6 trips to the NWT. This number is low due in part to the economic situation in New England and to hosting a function in the area for the first time. As concluded in the 1990 Consumer Show Report[1] it takes three years in a marketplace to achieve real sales results. Clearly Toronto produced better results. Presentations have been coordinated *in* Toronto for four years.

[1] Derek Murray Consulting

By combining sales with converted leads and multiplying the total with the average cost of the packages sold, we are able to estimate visitor expenditure. The following table provides an estimate of net benefit that results from hosting the Boston and Toronto presentations.

TABLE 6

**Cost-Benefit of the 1991 Presentations
Consumer Show Program and Private Sector Expenditures**

Boston

Projected Visitor Expenditure[1] (A)	$ 9,761.00
CSP Cost (B)	$ 9,272.00
Private Sector Cost[2] (C)	$ 20,174.00
Net Benefit (A - B - C =)	$(20,661.10)

[1]Average cost of participating operator packages - $2,122.00.
[2]$16,000 represents cost of airfare - donated by First Air.

Toronto

Projected Visitor Expenditure[1] (A)	$ 84,338.70
CSP Cost (B)	$ 15,000.00
Private Sector Cost[2] (C)	$ 11,000.00
Net Benefit (A - B - C =)	$ 49,905.00

[1]Average cost of participating operator packages - $2,178.00.
[2]Does not include airfare. Airfare applied to cost of attending the Toronto Sportsmen's Show.

There is a very positive cost-benefit impact stemming from the Toronto presentation. Clearly on this basis a presentation should be hosted again in Toronto.

Boston, however, produced a shortfall. It is fair to attribute this poor showing to New England's economic situation. The Canadian Tourism Research Institute in the May, 1991, bulletin, warns operators to expect a less than normal return for their marketing dollars from New England. April vacation intentions are about five percentage points below the national average, and the percentage of New Englanders planning to visit Canada is lower than for any other U.S. region. Operators will have to be very aggressive to maintain their markets from this region in 1991. The fact that this is the first time the NWT hosted a presentation in Boston, combined with the economic situation in New England, would explain the negative cost-benefit.

5.0 Conclusions and Recommendations

1. Presentations should continue in 1992.

Based on the positive cost-benefit impact for the Northwest Territories, Toronto should be targeted again in 1992.

Both presentations were viewed as being well coordinated. Generally participating operators found the presentation format, the opportunity to set up displays, and the guest speaker's unbiased approach created an impressive venue for marketing their products. Operators indicated 100% support for future presentations and between 72% and 80% would co-sponsor the functions (either through donating dollars or door prizes).

Based on operator support for returning to Boston and the fact that three years of marketing in the area are needed before real results will be seen, it is recommended that the NWT continue to coordinate presentations in Boston.

2. Toronto was the most successful presentation and complemented operator participation in the Toronto Sportsmen's Show.

A number of Operators participating in both the Toronto SportsmenZs show and the Toronto presentation found the presentation produced greater results in terms of sales and leads generated but that the Sportsmen's show was a good follow-up tool and acted as a catalyst for turning the presentation leads into immediate sales. Boston, on the other hand, was held on its own and operators had to follow-up leads without the opportunity to make face to face contact a second time.

3. Consistency must be achieved in a marketplace before real sales results are achieved.

The comparison between Boston (first time in the marketplace) and Toronto (fourth time in the marketplace) clearly shows the positive effects of 'working' a market for at least three years. As a general observation, operators have noted the improvements each year to the Toronto presentation, including coordination, quality of invited guests, focus of the guest speaker and timing of the function. These changes, combined with a continued presence in the marketplace and development of a qualified guest list (through past marketing efforts) contributed to the increase in sales and leads in Toronto in 1991. By testing format and approach in a market, methods for success are developed, a presence is established and qualified contacts are worked to expand the invitation base for future years. Therefore, it is important to keep the momentum going and return to a market for at least three years before real sales results will be achieved.

4. The time allotted for the functions should be increased.

In 1990 a common concern expressed by operators participating in the presentations, was the lack of time to interact with guests. In an attempt to address this concern, in 1991 the presentations were coordinated as evening functions, commencing at 5:30p.in. However, operators once again indicated they would prefer more time to sell their products during both Toronto and Boston. Options put forward in operator suggestions include: host the presentation from 4:00p.m. until 8:30p.m., with the period between 4:00p.m. and 5:30p.m. dedicated specifically to travel trade and media - consumers and special interest groups would be invited for the evening presentation and hors d'oeuvres; host a day long event incorporating different presentations and activities; and coordinate two separate functions - a luncheon for media/travel trade and an evening for special interest groups and consumers.

A day long event will present problems if the activity is coordinated in conjunction with a consumer show, unless it is held on a weekday prior to the show opening. All three options should be considered in the future and decisions made after reviewing location, date, marketplace trends and other activities being hosted concurrently in the area.

5. Guest Speaker was successful in generating interest in the Northwest Territories.

Generally it was felt that the guest speaker was effective in stimulating the audience by presenting an unbiased and educated look at the Northwest Territories. Most felt the presentation achieved the objective which was to entice guests to consider traveling to the NWT or promoting the NWT. Suggestions were made by some, however, that a more complete overview of the Northwest Territories be presented in the future. Both in 1990 and 1991 operators felt that the audio/visual presentations were either too product specific or too regionally oriented. Options to consider in the future are: allow operators to make presentations individually; procure and develop materials encompassing the image/message to be portrayed and hire a professional to deliver; outline the objectives of the presentation and hire a professional to develop and conduct; or hire a professional to deliver personal experience.

Decisions with respect to selecting a guest speaker should be based on established objective, date and thing and format chosen for future functions.

6. Continue to give operators the option to set up displays.

1991 was the first year in which operators were given the opportunity to set up displays representing their products. The benefits of such an arrangement are many, such as: providing visual backup which lends credibility and reality to possibility of travel and enhances prospects of sale; distinguishing product type/offering so that guests and operators do not waste time qualifying; establishing the fact that products are 'for sale' at the function; and distinguishing operators from guests. The set up of visuals provides something tangible to use as a point of reference.

7. Criteria for operator participation should be established to ensure a unified image is put forth and to avoid any embarrassment.

Two concerns were raised by operators participating in the presentations. The first was that some NWT participants indulged in too much alcohol which did not present a good image of the NWT. The second was that some operators arrived late for set-up, arriving after guests, and causing confusion in the display area by off setting the finalized floor plan with the introduction of display tables which had been dismantled due to their absence.

In order to avoid such experiences in the future, it is recommended that deadlines be established for set up of displays during the presentation.

It is not possible to control operator decisions with respect to conduct other than to disqualify operators abusing the situation from participating in future functions.