

Australia Consumer and Travel Trade
Final Report

April, 2007

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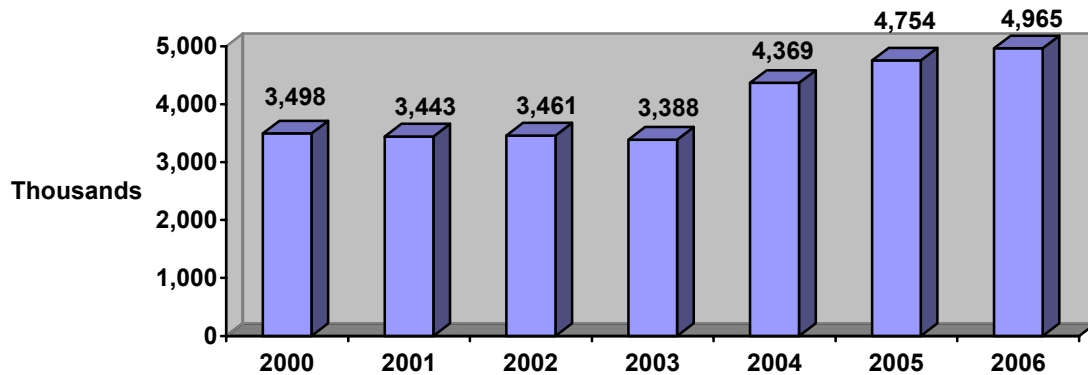
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Foreword

Background

Australia's outbound market experienced a 42% growth between 2000 and 2006, increasing from 3.5 million outbound travellers to 5 million outbound travellers.

EXHIBIT SECTION 1-1: AUSTRALIAN OUTBOUND TRAVELLERS, 2000 TO 2006

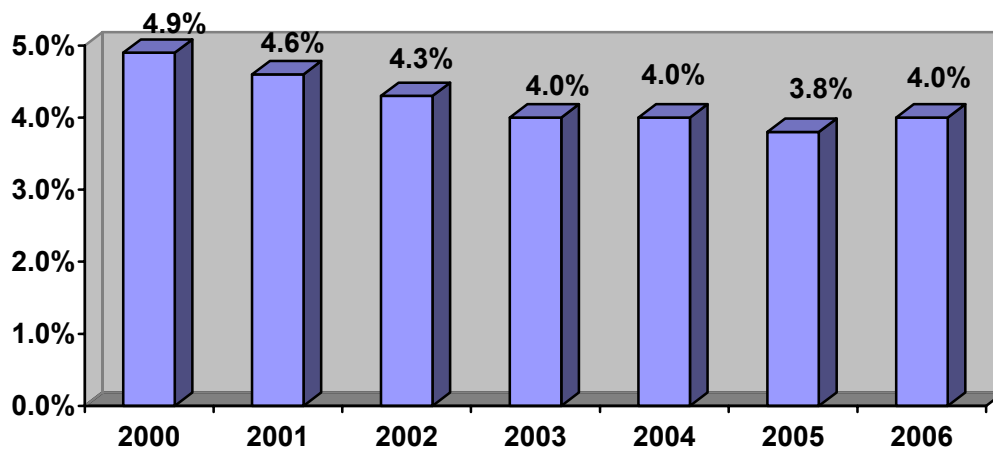


Source: Australian Tourism Forecasting Committee

This growth in outbound travel is an outgrowth of a national love of travel/exploration, fueled by an economy that is performing well and a relatively generous average annual leave entitlement.

Although Canada's share of the outbound market declined from 2000 (4.9%) to 2003 (4.0%), it has held steady since then (4.0% in 2006).

EXHIBIT SECTION 1-2: CANADA'S SHARE OF THE AUSTRALIAN OUTBOUND MARKET, 2000 TO 2006



Source: Australian Tourism and Statistics Canada

Background

The research was designed to meet 5 business objectives of the Canada Tourism Commission (CTC) and its partner including Tourism BC, Ontario Tourism Marketing Partnership, Alberta Tourism, Parks, Recreation and Culture, and Government of Yukon, Tourism and Culture.

- Designing the most effective advertising and marketing communication to reach the Australian travel market.
 - What triggers—current and potential—are there for Australians to visit Canada?
 - How can these triggers be best integrated into Canadian travel advertising?
 - What is the ideal timing for advertising to the Australian market?
- To determine and ensure the use of the most effective communication channels to reach the Australian travel market.
- To provide direction and assistance to the Australian travel trade in order to accelerate the growth of pleasure travel to Canada.
- To identify target markets for travel to Canada, within the overall Australian travel market.
 - A demographic profile for advertising planning and product packaging.
 - Special interest segments for product packaging and tour design.
- To create market sensitive product packages.
 - Determining the most appropriate activities/interests to focus on.
 - Establishing effective price points.
 - Discover the best packaging components (the correct type of accommodation, duration of stay, activities to include, etc.)

In order to meet these business objectives, the research incorporates 10 objectives. By pursuing these research objectives, the knowledge required to answer the business questions was obtained.

Background

The 10 research objectives were:

- Determine the size of the travel market.
- Profile the prospective market.
- Determine travel motivators to Canada.
- Evaluate Canada's competitive set.
- Analyze the market segments.
- Determine traveller and trip profiles.
- Determine what marketing channels are the best for Canada to use.
- Understand regional interest within Canada.
- Explore advertising strategies for Canada
- Discover evolving trends

Methodology

Phase One: Review of Existing Data

An examination of existing available data on Australian travel patterns and economics was conducted in order to provide context for the findings of the original research.

Primarily, the Australian Bureau of Statistics and Tourism Australia were used as sources.

Information of particular relevance to the existing research included:

- Economic performance
- Consumer Confidence
- Disposable Income
- Outbound Travellers, 2000 to 2006
- Destination patterns of outbound travellers
- Domestic Travellers, 2000 to 2006
- Value of the Australian dollar vs. the currencies of major destinations

Phase Two: Australian Long-haul traveller Focus Groups

In order to gather grassroots insights to shape the quantitative survey, as well as to give context to its results, focus groups were conducted among Australian travellers.

Six groups were conducted in Sydney. All participants had either travelled internationally in the past 3 years or had plans to travel internationally in the next 3 years.

Four of the groups included those who had **not** yet travelled to Canada, but were not rejecters of Canada. These groups were split among gender and age, with two of the groups being male and the other two female, and two being younger (30 to 49) and two being older (50 to 69).

The two remaining groups were those who had visited Canada in the past 3 years. These groups were made up of a mix of males and females, but the groups were split by age, with one being younger (30 to 49) and one being older (50 to 69).

The discussion guide is included in the appendix of this report.

Methodology

	Sydney		
	Male	Female	Mixed
Younger 30 - 49	Have not travelled to Canada	Have not travelled to Canada	Have travelled to Canada
Older 50 - 69	Have not travelled to Canada	Have not travelled to Canada	Have travelled to Canada

Phase 3: In-depth Interviews with the Travel Trade

As a great deal of the CTC's activities in Australia relate to the travel trade, a series of in depth interviews were conducted among the trade to gain a more complete picture of the travel market in Australia.

The interviews lasted, on average, between 30 and 45 minutes.

A discussion guide is included in the appendix of this report.

Fifteen interviews in total were conducted, with the following breakdown:

- 7 Interviews with Tour Operators/Wholesalers
- 4 Interviews with Travel Agents/Retailers
- 4 Interviews with those working at Airlines/Travel Media Outlets.

Phase Four: Consumer Quantitative Survey

A national online panel operated by OpenVenue was conducted with 2,772 Australian adults aged 18 and older from February 8 to 23, 2007.

Respondents met the following criteria:

- Travelled outside of Australia, New Zealand and the South Pacific for 4 nights or more for pleasure or personal reasons, to visit friends and relatives or a trip that combined business and pleasure in the past 3 years, or
- Planned to take a pleasure trip outside of Australia, New Zealand and the South Pacific for 4 nights or longer in the next 2 years.

Methodology

An oversample was implemented to reach n=400 past travellers to Canada. This was achieved by screening both the main panel fully and a second sister panel for qualifying past Canadian travellers. The oversample of past travellers to Canada was then weighted down to the level in the cross-section survey. The average duration of interview was 20 minutes. Detailed tables are available in a separate file. The questionnaire is appended for reference.

The average error range with a sample of 2772 is $\pm 1.9\%$. This means that in 19 out of 20 cases, the results based on a sample of 2772 will differ by no more than 1.9% from what would have been obtained by interviewing all consumers who meet the qualification criteria in the markets surveyed.

Omnibus Survey

In addition to the online survey, a telephone omnibus survey was conducted among 2,000 Australian aged 18+ across the nation to obtain incidence and profile data of the past and future pleasure trip travellers. This provided a base from which to weight the online survey as required.

In this case, a city weight was applied to the online sample to reflect a more accurate distribution of past/future travellers in each of the survey cities/regions.

Results

The findings of the study are presented under four main headings:

- Key Findings
- Marketing Considerations
- Findings in Detail
- Appendix

Throughout the report, circles (= ↑) and squares (= ↓) have been used to highlight meaningful differences.

Key Findings

Key Findings

Long-Haul Travel Trends

The Australian economy has been strengthening over the recent past and is expected to continue to be strong in the foreseeable future.

This has had significant impact on the outbound travel market.

- Total outbound travel is up 42% from 2000.
- Domestic travel has remained relatively constant.

From a destination perspective, the real surge in growth has been medium-haul:

- New Zealand (+59%)
- Fiji (+172%)
- Asia – particularly Thailand (+94%), China (+170%), Singapore (+39%) and Hong Kong (+26%)

Longer-haul travel has also grown, but not to the same degree – U.K. (+23%), U.S. (+13%), Canada (+15%).

Canada's market share of total Australian outbound travel is 4.0%, down from 4.9% in 2000. Reflecting departure shifts, as expected, the market share of other long-haul destinations are down also.

	<u>Australian Departures to Key Destinations</u>				<u>Market Share</u>	
	<u>2000</u>	<u>2006</u>	<u># Change</u>	<u>% Change</u>	<u>2000</u> <u>%</u>	<u>2006</u> <u>%</u>
<u>Total Australian Outbound Travel</u>	3,498,000	4,965,000	+1,467,000	+42%	100.0	100.0
<u>Key Destinations</u>						
<u>Oceania</u>						
New Zealand	528,000	839,000	+311,000	+59%	15.1	16.9 ↑
Fiji	75,000	204,000	+129,000	+172%	2.1	4.1 ↑
<u>Asia</u>						
Thailand	151,000	293,000	+142,000	+94%	4.3	5.9 ↑
China	92,000	248,000	+156,000	+170%	2.6	5.0 ↑
Singapore	153,000	212,000	+59,000	+39%	4.4	4.3 ↓
Hong Kong	155,000	195,000	+40,000	+26%	4.4	3.9 ↓
Indonesia	280,000	179,000	-101,000	-36%	8.0	3.6 ↓
Malaysia	135,000	169,000	+34,000	+25%	3.9	3.4 ↓
<u>Europe</u>						
United Kingdom	339,000	416,000	+77,000	+23%	9.7	8.4 ↓
<u>Americas</u>						
U.S.	395,000	447,000	+52,000	+13%	11.3	9.0 ↓
Canada**	173,000	200,000	+10,000	+15%	4.9	4.0 ↓

Source: Tourism Australia

**Source: Statistics Canada arrivals (differs from country of destination definition)

Key Findings

Multi-Country Visits

As many as half (48%) of all trips to Canada included the U.S. on the journey. Another significant minority also visited Europe on the trip (29%). Only one in four (26%) visit Canada only.

This flags a real opportunity to encourage U.S. destined travellers in particular to include Canada in their itinerary.

Only 16% of trips to the U.S. also included Canada – implying a sizeable potential.

Only 4% of Europe bound visitors also visited Canada (9% the U.S.) so transiting via Canada (and including a stop over) is not very common. However, it may be a viable option to promote, given the level of travel to Europe.

This chart highlights the opportunity for Canada to provide consumer relevant product that facilitates existing travel behaviour patterns – namely, combined destinations.

	<u>Most Recent Trip Destination</u>		
	<u>Europe</u>	<u>U.S. Mainland</u>	<u>Canada</u>
<u>Also Visited:</u>	(688) %	(337) %	(243) %
Asia	29	19	22
Europe	100	23	29
U.K.	65	17	22
Other Europe	65	16	21
U.S. Mainland	9	100	48
Canada	4	16	100
Canada only	n/a	n/a	26

Whether travelling via the U.S. or Europe, visitors to Canada are spending 5 to 7 weeks away from home and at least 10 nights within Canada.

Consequently, Canada is clearly an integral part of the journey, not just a stop over.

Key Findings

The Core Appeal of Canada

At the core of Canada's appeal is its spectacular, breathtaking beauty. Elements contributing to this in the Australian mind are:

- Majestic Beauty
- Mountains
- Forests
- Abundant Wildlife
- Vast wilderness
- Clean and untouched landscapes

A very close second to Canada's beauty is the abundant recreational opportunities.

It is this unique combination of majestic beauty and vast recreational opportunities that elevates Canada's appeal. Australians understand what vastness is, as they experience it in their own country. They have seen far vistas, huge valleys, and mountain ranges. They are also very outdoorsy. They enjoy outdoor recreation, days at the beach, sailing, hiking, barbequing, etc.

Canada offers an "easy" destination, which is sufficiently different yet remarkably similar. While Canada has the same language, same attitude, sense of humour, way of living, living standards, economy, physical size, and urbanization, it is the virtual reverse of the Australian landscape and climate (e.g. cool not hot, moist not dry, green not brown/orange etc).

Australians are currently contending with a drought. They see their country as arid.

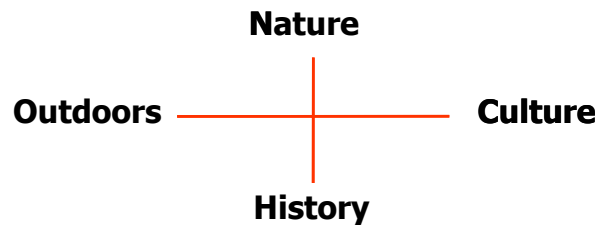
Therefore, another major appeal of Canada is its clean, fresh, moist and dewy air, forests and countryside. Australians get a sense that they can breathe and take in fresh forest-generated oxygen and moisture.

When Australians think of Canada, they imagine lush oxygen rich parks, forests and lakes that they can swim in; wilderness trails that they can trek and camp on; abundant wildlife that they can observe and photograph. That's when they become really excited, because that's when they realize the full potential of all of the recreational possibilities.

Key Findings

Perceptual Brand Map

The Correspondence Analysis on the next page correlates destination imagery ratings on two computer driven axes:



Each of the attributes is plotted on the map with the positioning of each destination. The map, through multivariate analysis, illustrates the relative position of each destination and each attribute, based on their ratings on each. In other words, the more a particular destination is uniquely associated with an attribute the closer it is charted to it.

Brand Positioning

Europe

In the Southeast quadrant, Europe is a blend of culture and history

U.S.

A sense of excitement exists in the USA's "neighbourhood", a source of exciting stories, new and unique experiences, friendly people.

S.E. Asia

Culturally different, S.E. Asia provides an opportunity to get away, try new foods, on an affordable vacation.

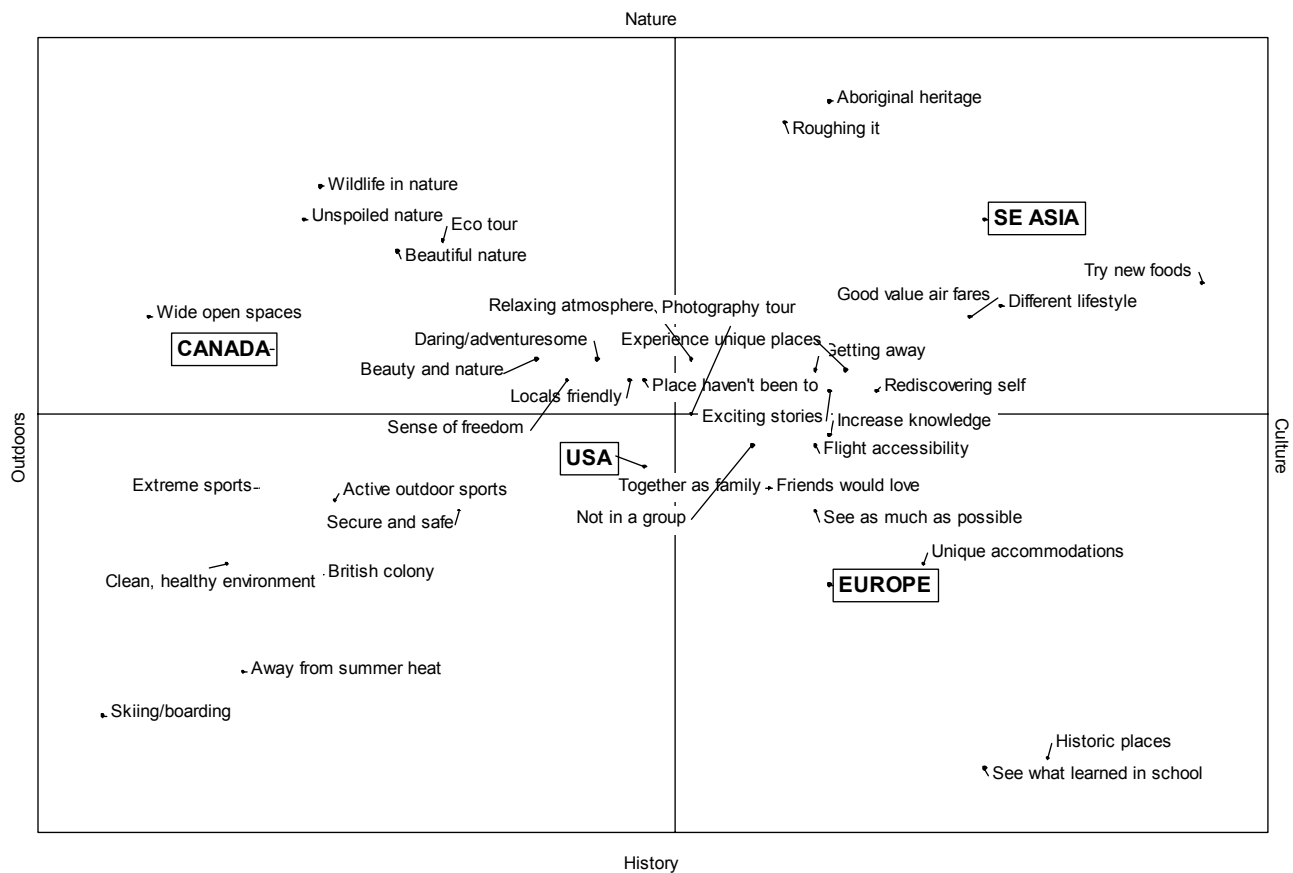
Canada

Far to the Outdoors end of the spectrum, Canada essentially "owns" wide open spaces, outdoor activities and beautiful nature.

Clearly, Canada's competitive strength lies in its nature.

Key Findings

Perceptual Brand Map



Key Findings

The Australian long-haul can be sub-divided into four benefit segments:

Nature Inspired (33%)

This segment represents 33% of the travel market. Key benefits sought in travel are to be surrounded by beautiful nature and feel inspired by it. The demographics skew older and female.

Culture Seekers (27%)

This group has a strong cultural focus – opportunity to experience unique places, to increase knowledge, seeing first hand what they learned in school. This segment spans all ages.

Recreation and Relaxation (23%)

These tend to be family travellers seeking a relaxing, friendly, safe and healthy environment.

Outdoor Sports Seekers (17%)

Under 30, males dominate this segment. They want to enjoy outdoor sports, be daring and adventurous. They represent 17% of the Australian travel market.

Canada's Prime Targets

Canada's product is most appealing to two of those segments.

1. Nature Inspired

- Primarily older individuals (age 50+)
- Canada only has a 5% share of this segment's trips

2. Outdoor Sports Seekers

- Primarily younger travellers (19 to 29)
- Canada only has a 5% share of this segment's trips

Key Findings

The ideal Canadian vacation and each target's profile are described below:

	<u>Ideal Canadian Vacation</u>	
	<u>Nature Inspired</u>	<u>Outdoor Sports Seekers</u>
Season of travel	<ul style="list-style-type: none"> • 2nd/3rd quarter preferred 	<ul style="list-style-type: none"> • All 4 quarters equally
Multi-country visit	<ul style="list-style-type: none"> • Includes U.S., occasionally Europe 	<ul style="list-style-type: none"> • Includes U.S. and/or Europe
Duration in Canada	<ul style="list-style-type: none"> • 3 weeks 	<ul style="list-style-type: none"> • 3 weeks
Fully Independent Travel (FIT)	<ul style="list-style-type: none"> • Majority 78% – package: 35%, non-package: 43% 	<ul style="list-style-type: none"> • Majority 81% – package: 28%, non-package: 53%
Canadian regions	<ul style="list-style-type: none"> • Across Canada 	<ul style="list-style-type: none"> • Across Canada
Preferred accommodation	<ul style="list-style-type: none"> • Resort (mountain or lakeside) • Mid-priced hotel • Cruise ship 	<ul style="list-style-type: none"> • Resort (mountain or lakeside) • Ski resort
Preferred activities	<ul style="list-style-type: none"> • Car rental • Rail travel • Nature sightseeing • Experiencing Canadian culture/cuisine • Alaska cruise • See historical sites • Lower interest in soft adventure 	<ul style="list-style-type: none"> • Car rental • Rail travel • Soft adventure – particularly skiing/snowboarding, camping, canoeing/kayaking, hiking/trekking, horseback riding
<u>Segment Profile</u>		
<u>Gender</u>		
Male	42	59
Female	58	41
<u>Age</u>		
18 to 29	15	55
30 to 39	15	24
40 to 49	18	13
50+	51	8
<u>Canada's Current Market Share</u>	5%	5%

Key Findings

The activities of interest on a future trip to Canada for each target segment are numerous and varied. Australians clearly want to see and do as much as possible.

Outdoor Sports Seekers show high interest in:

Canoeing/kayaking	(72%)
Snow skiing/snowboarding	(74%)
Camping	(57%)
Horseback riding	(58%)
Attending a sporting event	(56%)
Eco-travel	(49%)

Nature inspired want:

- To see and feel Canada's natural environment,
- but are also intrigued by Canadian culture.

Key Findings

Influential Media

Given the importance of Visiting Friends/Relatives VFR travel to Australians, it is not surprising that friends and relatives drive the destination decision for half of all long-haul trips.

However, beyond the VFR factor, non-commercial media (that is non-paid advertising -- e.g., television travel shows) and the internet are both critical catalysts.

- “Getaway” is the most influential television show
- Online travel agencies, other private sector sites and National Tourist Offices’ (NTO’s) are all influential internet channels.

Trip Planning

Australians plan their trip to Canada 7 months in advance and book 4 months in advance of travel. Consequently, product promotion must be timed well in advance of the travel season.

Most book through travel agents or package providers (73%) when organizing Canadian vacations.

However, even with the high level of FIT (fully independent travel -- currently 9 in 10 trips to Canada), booking direct with an airline is only practiced by 27% going to Canada.

The Travel Trade

- Wholesalers have created a very narrow product offering in Australia that caters mainly to group travel.
- Several of the large travel companies sell Canada mainly on a “group” basis which has greatest appeal to an older target. Therefore, the younger traveller and FIT travellers (90% of current visitors) are likely under served.
- The ‘group’ packages are mainly West Coast experiences and therefore there is little product to easily facilitate “other parts of Canada” visitation. This could also have negative influences on repeat visitation.

Key Findings

Travel Trade, continued

Both the trade and the consumer feel that to take an FIT trip to Canada is more expensive and more difficult to orchestrate than to the U.S., or even Europe for that matter. Much of this revolves around flights, usually the first thing that is initiated in an FIT buy cycle.

1. Air Canada is understood to be significantly more expensive than U.S. airlines.
2. Flights are infrequent.
3. The equipment is outdated and the service substandard.
4. Air Canada is not seen as being committed to the Australian market (at the time of the research – December, 2006).

To validate this last point, there were fewer flights between Australia and Canada between 2003 and 2005.

All of this combined can drive potential FIT travellers to choose an alternative destination, based simply on being easier and cheaper to get there.

The trade also believes that Australians are less familiar (in touch) with Canada today than they were several years ago.

1. The “being part of the Commonwealth” is less of a pull.
2. There is little non-tourism oriented “hype” about Canada, like the U.S. enjoys like “Sex in the City”, “ER”, “documentaries”.
3. Several retail travel agents were critical of both Air Canada’s and Canada’s general lack of education and promotion.
4. The trade was vocal about the staff changing at the CTC, where they feel there was some damage done at the local level, and are happy to see the previous manager back.
5. Canada, specifically B.C. and Whistler, were mentioned as having poor snow conditions in the past few years. Positive snow reports are critical in drawing the skiing and snowboarding market. Case in point is Japan being higher on the consideration list, because of word of mouth circulating that it has had good snow recently.

Key Findings

Canada's Current Visitor

The profile of Canada's current visitors from Australia are outline below.

Multi-country visits	<ul style="list-style-type: none"> • 26% Canada only. Usually in combo with U.S. (48%) or Europe (29%)
Trip Duration (median)	<ul style="list-style-type: none"> • Median nights on trip:29, median in Canada:12
Season	<ul style="list-style-type: none"> • April to September (Australia's cooler season)
Party Composition	<ul style="list-style-type: none"> • With spouse (48%), alone (29%), with children (only 15%) • Average party size: 2.8 persons
FIT	<ul style="list-style-type: none"> • Mostly FIT (90%)
Top Five Activities in Canada	<ul style="list-style-type: none"> • Seeing beautiful rivers and waterfalls • Seeing modern landscapes • Visiting places of historical interest • Viewing majestic mountains • Seeing wildlife in nature
Purpose of Trip	<ul style="list-style-type: none"> • VFR 56%, but sightseeing dominates
Accommodation	<ul style="list-style-type: none"> • Home of friend or relative (45%), mid-priced or budget property preferred
Expenditure (average)	<ul style="list-style-type: none"> • \$12,280 CDN per trip
Profile	<ul style="list-style-type: none"> • Sydney, Melbourne key markets • 56% under 40, 28% 50+ • 54% close friends/relatives in Canada

SWOT Analysis

SWOT Analysis

Strengths

- The Australian economy is growing and expected to remain healthy into the foreseeable future.
- The Australian dollar has been strengthening against the Canadian currency in the past 6 months.
- The outbound travel market continues to grow.
- Canada's spectacular, breathtaking natural beauty appeals to Australians.
- Canadian nature provides a welcome contrast to Australia's more arid, drought affected environment. Canada is clean, fresh, moist and dewy with lush oxygen rich parks, forests and lakes.
- Australians enjoy outdoor recreation and the opportunities for soft adventure in Canada are highly appealing.
- Canada remains a popular ski/snowboard destination.
- Canada is considered friendly and welcoming to Australians.
- As a Commonwealth country, there is a sense of shared history, kindred spirit and brotherhood.
- Canada is frequently involved on many Northern Hemisphere journeys.
- Australians bound for Europe are becoming increasingly tired of connecting through Asia and may be becoming more open to a routing via Canada.
- As many as 22 % of Australians have close friends or relations in Canada.
- Air Canada is introducing a new Sydney to Vancouver service in December, 2007.
- Australian visitors arrive in all seasons.
- The Canadian brand is perceived as very different from the U.S. or European brands, providing a rationale for inclusion in a Northern Hemisphere tour.

SWOT Analysis

Weaknesses

- Canada's market share has fallen since 2000 in step with the U.S. and, to some degree, the U.K.
- Canada direct air service is lacking.
- Wholesalers are focusing on group travel, a very small share of current visitors, whereas the FIT package market appears under developed.
- Air fares to Canada are high vis-à-vis the U.S.
- Canada has low presence generally and in the travel arena specifically.
- Canada only ranks 10th as a future destination priority, well behind the U.K. and the U.S. which are in 1st and 2nd positions.

Opportunities

- Promote Canada as a must see destination on Northern Hemisphere journey whether to the U.S, Europe or both.
- Canada can be a welcome routing to Europe, avoiding Asian stopovers.
- Develop FIT packages that focus on experiencing Canadian nature – both as an observer (for the less active) and via soft adventure.
- Create a strategy for the trade which highlights the benefit of routing via Canada en route or returning from the U.S. and/or Europe.
- Encourage Australian television producers to consider Canada for travel programming.
- Enhance the CTC website to address interests in Canadian outdoor experiences.
- Consider creating special events in Canada directed to Australian visitors and engaging local friends and relatives.

Threats

- Aggressive promotion by competitive destinations – e.g., Colorado ski resorts.
- Air fares to Canada do not improve.

Findings in Detail

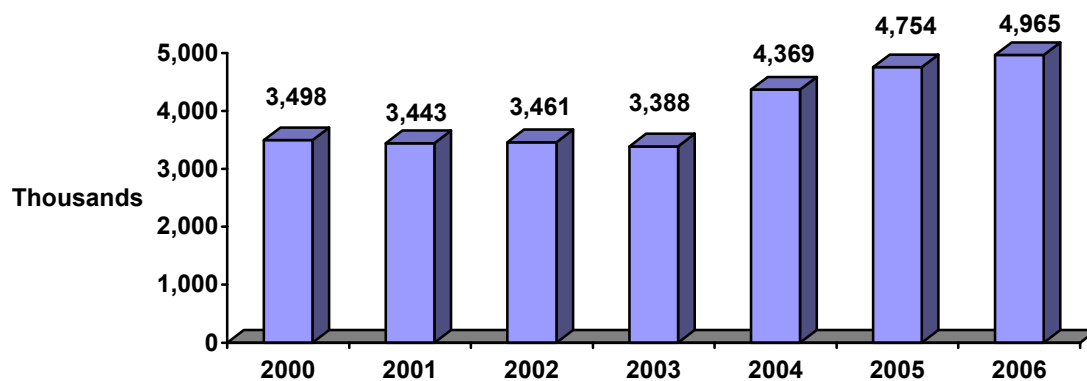
Travel Trends

Section 1: Destination Patterns

1.1 Australia Outbound

Total outbound travel from Australia has been climbing steadily from a short-term low in 2003. From 2000, the market has grown 42%.

EXHIBIT SECTION 1-1: AUSTRALIAN OUTBOUND TRAVELLERS, 2000 TO 2006



Source: Australian Tourism Forecasting Committee

1.2 Destinations

Nearby New Zealand and Fiji attracted over 1 million visitors from Australia in 2006. For long-haul travellers (beyond Oceania), there is clearly a preference for Asia – especially Thailand, China, Singapore and Hong Kong.

North America drew a sizeable volume – the U.S. 447,000, Canada saw 200,000** arrivals.

In terms of trending, the biggest gains over the past 6 years have been in Asia and Oceania. The U.S. (+13%) and Canada (+15%) have not enjoyed the same measure of tourism growth.

EXHIBIT SECTION 1-2: AUSTRALIAN DEPARTURES TO KEY DESTINATIONS, 2000 VS. 2006

Key Destinations	2000	2006	# Change	% Change
<u>Oceania</u>				
New Zealand	528,000	839,000	+311,000	+59%
Fiji	75,000	204,000	+129,000	+172%
<u>Asia</u>				
Thailand	151,000	293,000	+142,000	+94%
China	92,000	248,000	+156,000	+170%
Singapore	153,000	212,000	+59,000	+39%
Hong Kong	155,000	195,000	+40,000	+26%
Indonesia	280,000	179,000	-101,000	-36%
Malaysia	135,000	169,000	+34,000	+25%
<u>Europe</u>				
United Kingdom	339,000	416,000	+77,000	+23%
<u>Americas</u>				
U.S.	395,000	447,000	+52,000	+13%
Canada**	173,000	200,000	+10,000	+15%

Source: Tourism Australia

**Source: Statistics Canada arrivals (differs from country of destination definition)

1.3 Canada's Market Share

While Australian arrivals to Canada have increased by 15%, Canada's share of the outbound market fell between 2000 and 2003, and then leveled off since then.

EXHIBIT SECTION 1-3: AUSTRALIAN ARRIVALS TO CANADA, 2000 TO 2006

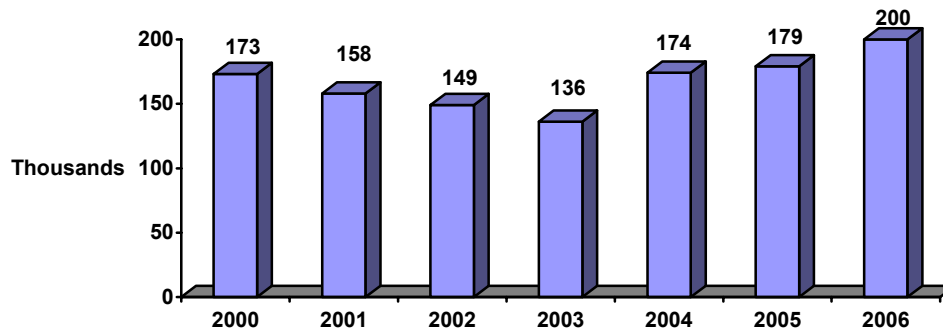
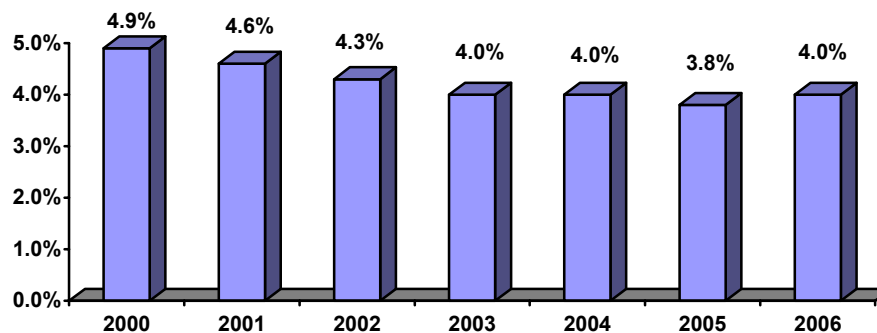


EXHIBIT SECTION 1-4: CANADA'S SHARE OF THE AUSTRALIAN OUTBOUND MARKET, 2000 TO 2006

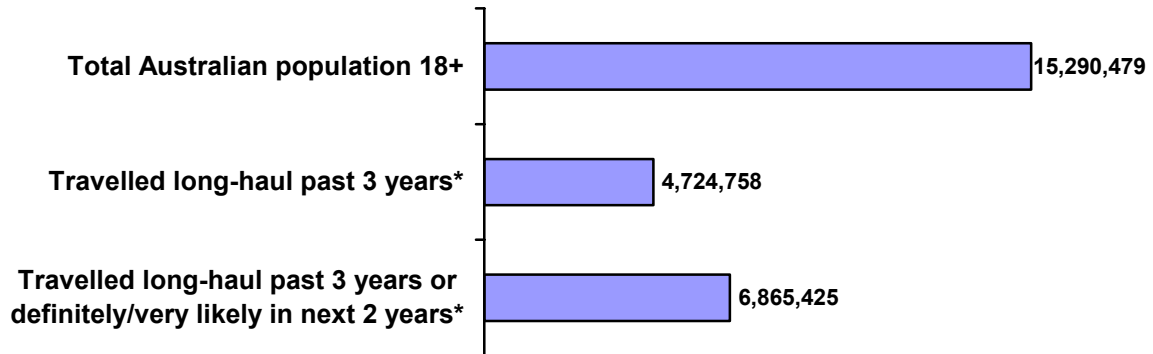


Source: Australian Tourism and Statistics Canada

1.4 Size of Australian Long-haul Travel Market

The Australian long-haul travel market (as defined by CTC) is clearly sizable – 6.9 million individuals having either travelled outside Oceania in the past 3 years or very likely to do so in the next 2 years.

EXHIBIT SECTION 1-5: SIZE OF AUSTRALIAN LONG-HAUL TRAVEL MARKET



*Source: Omnibus Survey, 2006

1.5 Domestic Travel

Australian domestic tourism has been relatively stable since 2000, remaining just below the level of 300 million visitor nights per year.

Note that VFR and business have remained stronger than the more flexible holiday trip. These trips are clearly being shifted to outside the country.

EXHIBIT SECTION 1-6: AUSTRALIAN DOMESTIC TRAVEL

Domestic Visitor Nights (thousands)	2000	2006*	Change %
Total	293,384	280,897	-4.3
Purpose			
Holiday	144,375	132,260	-8.4
VFR	84,896	89,286	5.2
Business	44,705	41,581	7.0
Other	19,406	17,769	-8.4
Destination			
New S. Wales	92,559	83,956	-9.3
Victoria	54,039	52,053	-3.7
Queensland	74,087	76,239	2.9
S. Australia	21,251	18,944	-10.9
W. Australia	28,857	28,491	-1.3
Tasmania	8,139	8,706	7.0
N. Territory	7,914	6,445	-18.6
Capital Territory	6,467	5,499	-15.0

Source: Australian Tourism Forecasting Committee. *Estimates based on data to date (report released October 2006).

Section 2: Economic Influencers

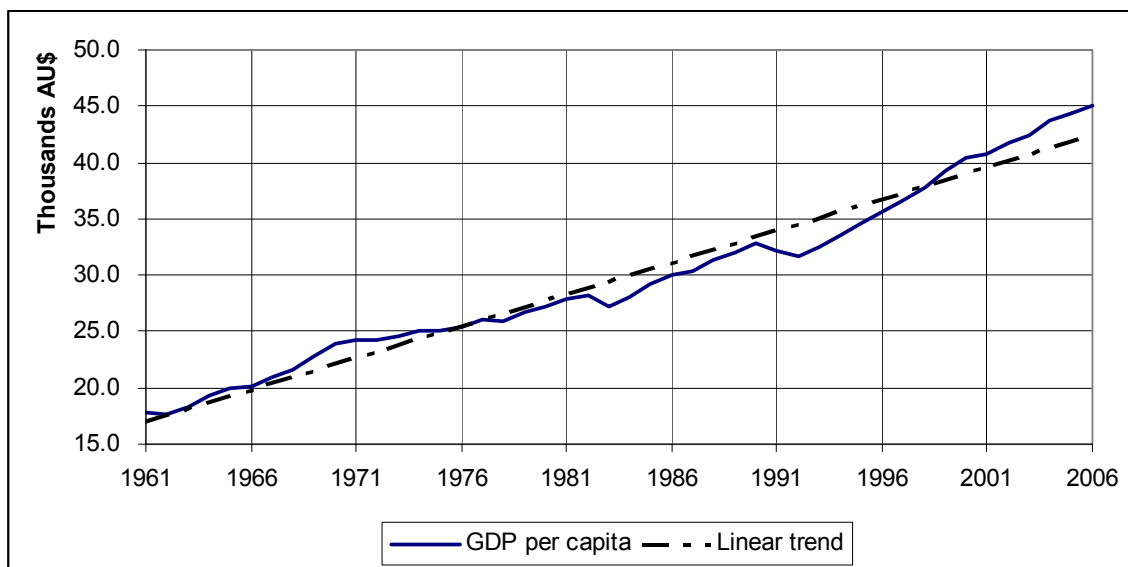
2.1 Economic Overview

The Australian economy is considered a strong blend of US style capitalism and European social welfare. Due to conservative fiscal policies on the part of the federal government, Australia has been running a budget surplus for the past decade. It is an economy on par with European economies such as France and Germany, countries that Australia ranks close to in terms of GDP per capita.

A great deal of Australia's economic strength comes from exporting natural resources. Australia sends about a fifth of its exports to Japan, aiding to fuel the manufacturing industry there. Additionally, nations such as China and India that are rapidly developing are importing raw materials from Australia.

Overall, Australia is economically healthy and expected to remain that way.

EXHIBIT SECTION 2-1: GDP PER CAPITA, THOUSANDS OF AUS \$



Source: Australia Key National Accounts aggregates, 5204.0, (Nov) 2006

2.2 Exchange Rates

The Australian dollar has been gaining strength from 2000 to 2006 against the U.S. and Asian currencies and to a lesser degree, U.K.. However, against the Euro it has declined.

Against the \$Cdn the \$Aus had been gaining ground up until 2004, but the recent surge in value of the Canadian currency brought the exchange rate back to the 2000 level. This will have created a negative force in the cost of travel to Canada over the past 2 years.

EXHIBIT SECTION 2-2: AUSTRALIAN DOLLARS TO BUY FOREIGN CURRENCY

Currency	2000	2001	2002	2003	2004	2005	2006	Change 2000 to 2006
U.S. Dollar	1.72	1.93	1.84	1.53	1.36	1.31	1.33	+23%
GB Pound	2.61	2.78	2.76	2.51	2.49	2.39	2.44	+7%
Euro	1.59	1.73	1.74	1.74	1.69	1.63	1.67	-5%
Canadian Dollar	1.16	1.25	1.17	1.10	1.04	1.08	1.17	-1%
New Zealand Dollar	.78	.81	.85	.89	.90	.92	.86	-10%
Chinese Yuan	.21	.23	.22	.19	.16	.16	.17	+19%
Hong Kong Dollar	.22	.25	.24	.20	.17	.17	.17	+23%
Singapore Dollar	1.00	1.08	1.03	.88	.80	.79	.84	+16%
Indonesian Rupiah*	.02	.02	.02	.02	.02	.01	.01	+50%

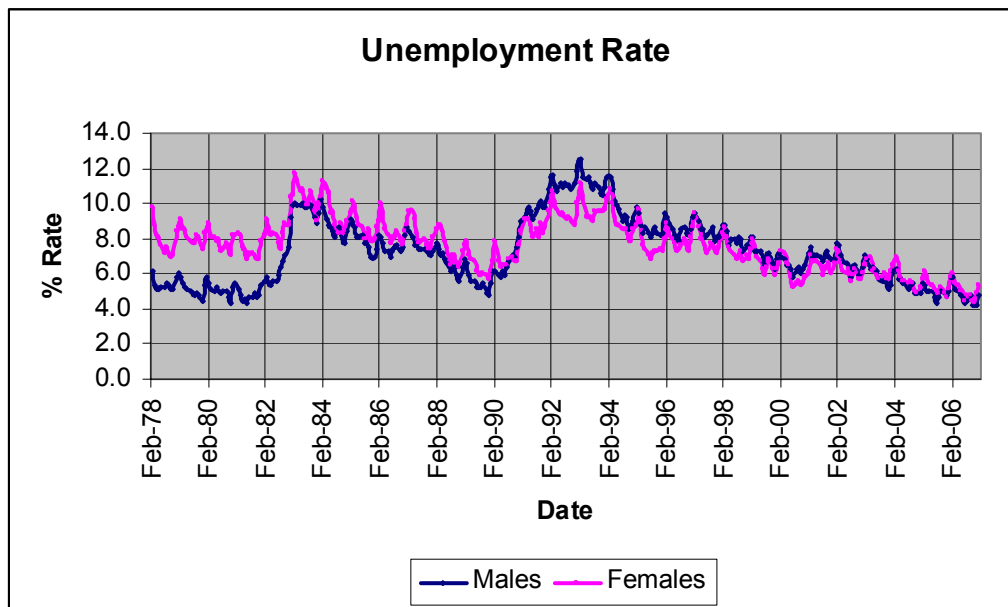
Source: Reserve Bank of Australia. * per 100 IDR

2.3 Employment

On the whole, Australia has an enviable employment pattern. While Australia was affected by the global restructurings of 1982-1985 and 1991-1993, they were hardly touched by the high technology bubble burst in 2000.

In addition, a series of employment law reforms in the 1990's eliminated many of the welfare state employment guarantees, and downloaded responsibility for contract negotiations to individual company-employee groups. The effect of this has been interesting. While it is easier for a person to lose their job, it has also meant that companies are more likely to hire people since the cost of both hiring and firing has been reduced. The net effect of these policies is to reduce unemployment and, at the same time, produce a more mobile (and agile) workforce.

EXHIBIT SECTION 2-3: UNEMPLOYMENT RATES

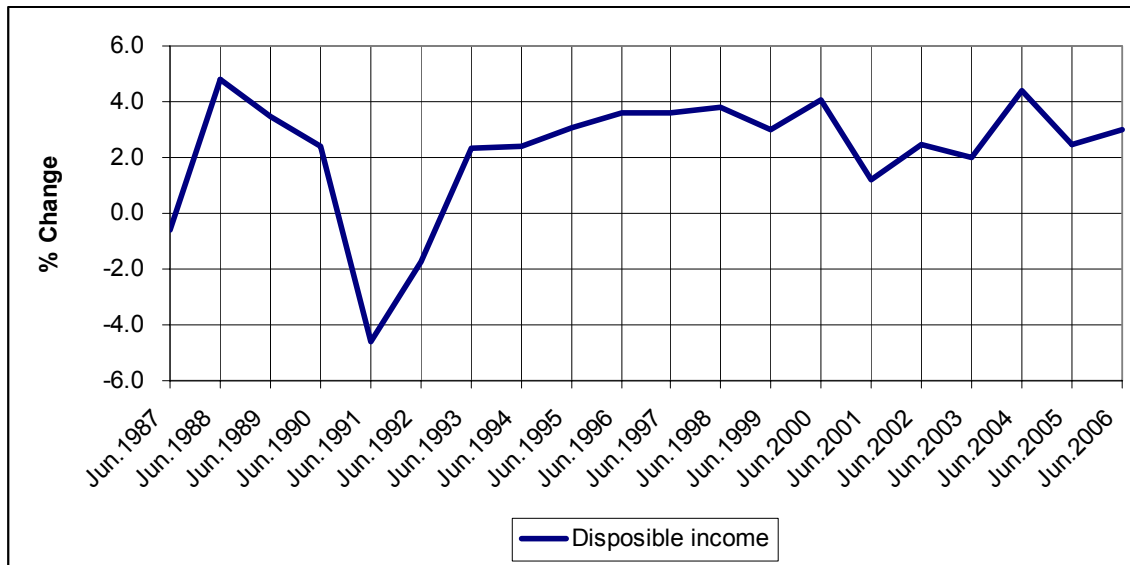


Source: Australia Bureau of Statistics (ABS), series A91349J and A92173L

2.4 Disposable Income

Due to the reduction in unemployment and general economic health, Australians have seen gains in disposable income. Between 1993 and 2006, disposable income for Australians has increased by 2.96% per annum.

EXHIBIT SECTION 2-4: PERCENT INCREASE IN DISPOSABLE INCOME AMONG AUSTRALIANS

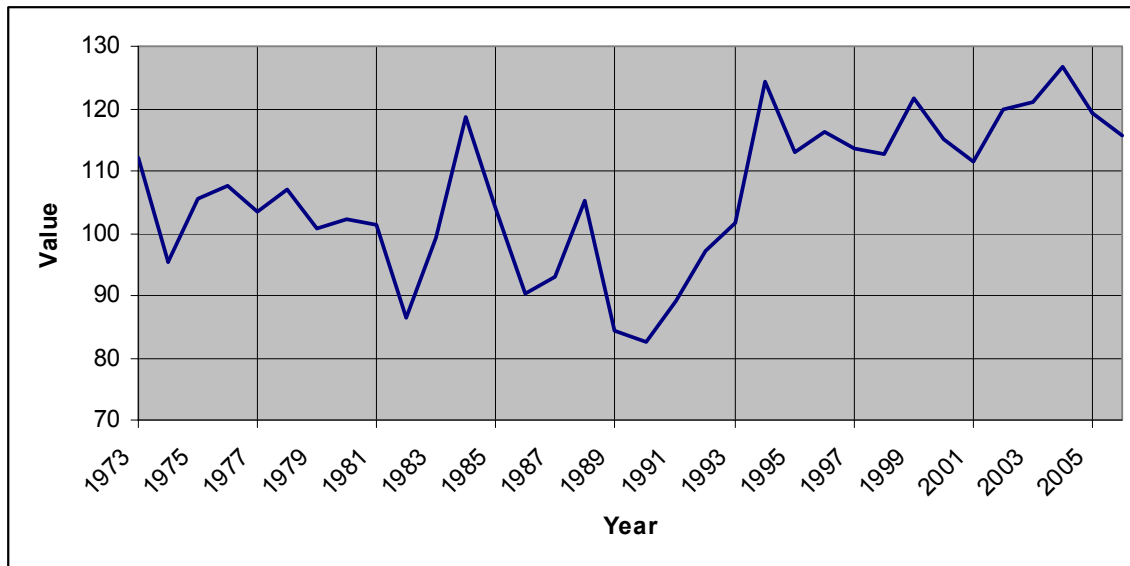


Source: Australia Bureau of Statistics, series Key National Accounts Aggregates

2.5 Consumer Confidence

As a result of the strong economy and the benefits that Australians are reaping from it, consumer confidence has generally risen, and is currently high. Like all markets, world events cause trembles in the index that cannot be controlled.

EXHIBIT SECTION 2-5: AUSTRALIAN CONSUMER CONFIDENCE

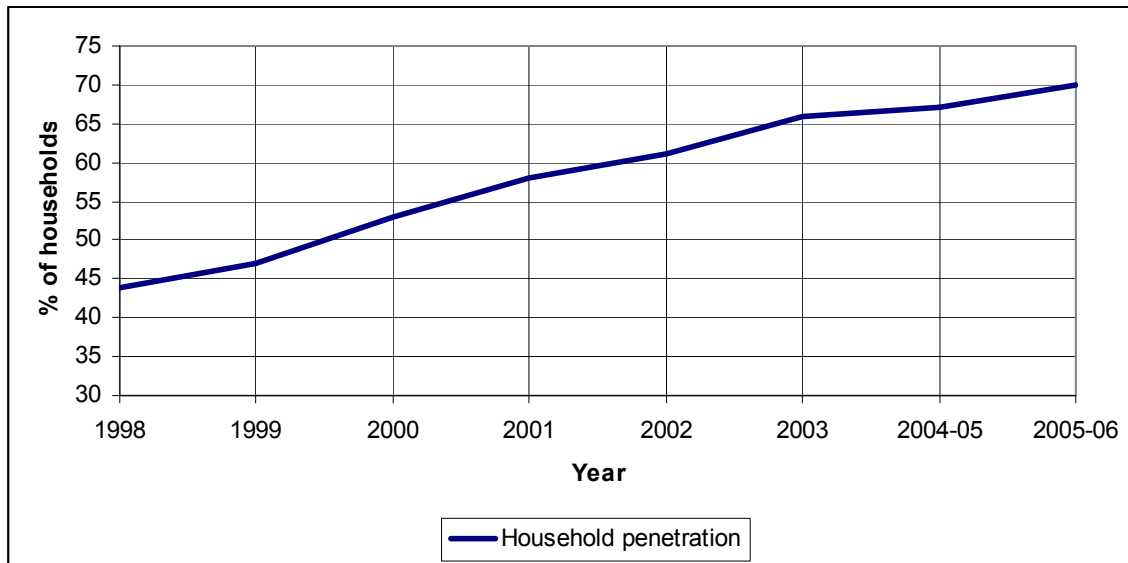


Source: Roy Morgan Research, 2006

2.6 Internet Use

The Internet has integrated heavily into Australian society, going from 44% penetration in 1998 to 70% in 2006. Of people who use the Internet at home, between 96% and 98%, depending on age group, used it for “Personal or Private purposes” (no specific breakdown of these purposes is available).

EXHIBIT SECTION 2-6: INTERNET PENETRATION



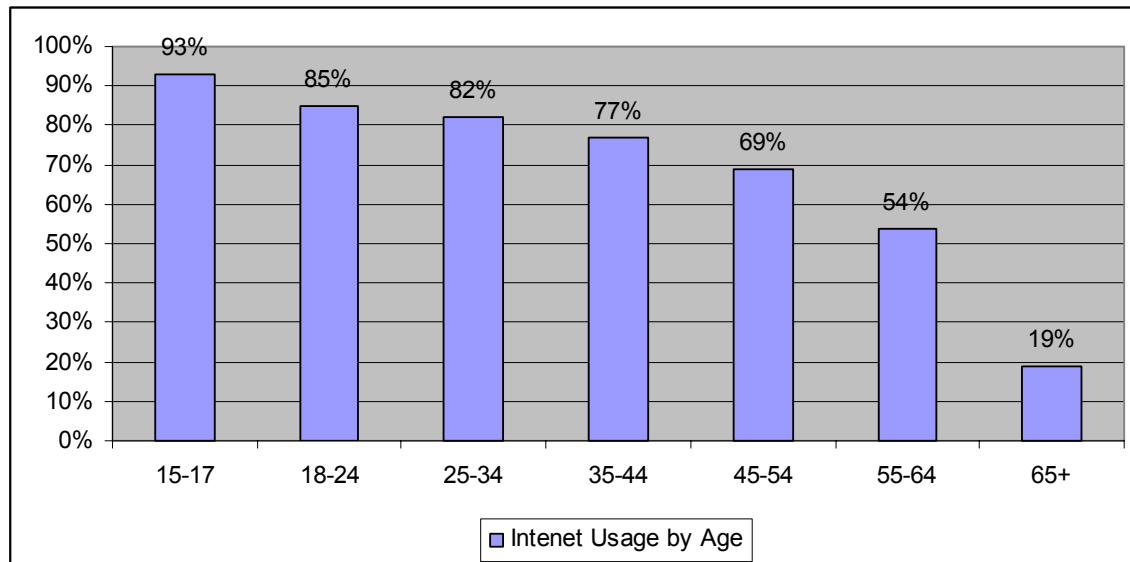
Source: ABS, *Household Use of Information Technology, 2005-06*, page 10

2.7 Internet Use

As with most industrialized nations, use of the Internet is highest amongst younger individuals, with 93% of 15-17 year olds using the Internet at least weekly.

As discussed later, Canada's two prime targets, **Outdoor Sports Seekers** and **Nature Inspired**, tend to skew younger and older, respectively. Consequently internet marketing can reach a broader cross-section of Outdoor Sports Seekers than Nature Inspired at the present time, before internet use broadens among older individuals.

EXHIBIT SECTION 2-7: INTERNET USAGE BY AGE



Source: ABS, *Household Use of Information Technology, 2005-06*, page 18

2.7 Population

Current estimates put Australia's population at 20,264,082, considerably smaller than Canada.

The median age of the Australian population is 36.9 and is expected to rise to 40.2 by 2020 as the population ages.

By 2020 there are expected to be more than 8 million Australians over the age of 50, a 34% increase over 2006. The vacation travel needs of this older group, therefore, will become more important over the next decade as the population ages.

In Australia, retirement age is 65 for men who wish to receive their full government pension. For women, the age varies based on their date of birth as part of a process to gradually increase it from 61 to 65. Consequently, a significant proportion of that older segment will be retired.

EXHIBIT SECTION 2-8: AUSTRALIAN POPULATION BY AGE

Population	2006	2010	2015	2020
Below 20	5,362,308	5,337,179	5,263,591	5,251,085
20 to 29	2,722,549	2,813,043	2,926,730	2,917,579
30 to 39	3,006,213	2,927,353	2,864,216	2,966,024
40 to 49	2,966,282	3,026,293	3,072,873	2,987,920
50 and over	6,206,730	6,821,422	7,569,599	8,286,343
Median Age	36.9	38	39.3	40.2

Source: US Census Bureau

2.8 Summary

The Australian economy has been strengthening over the recent past and is expected to continue to be strong in the foreseeable future.

This has had significant impact on the outbound travel market.

- Total outbound travel is up 42% from 2000.
- Domestic travel has remained relatively constant.

From a destination perspective, the real surge in growth has been medium-haul:

- New Zealand (+59%)
- Fiji (+172%)
- Asia – particularly Thailand (+94%), China (+170%), Singapore (+39%) and Hong Kong (+26%)

Longer-haul travel has also grown, but not to the same degree – U.K. (+23%), U.S. (+13%), Canada (+15%).

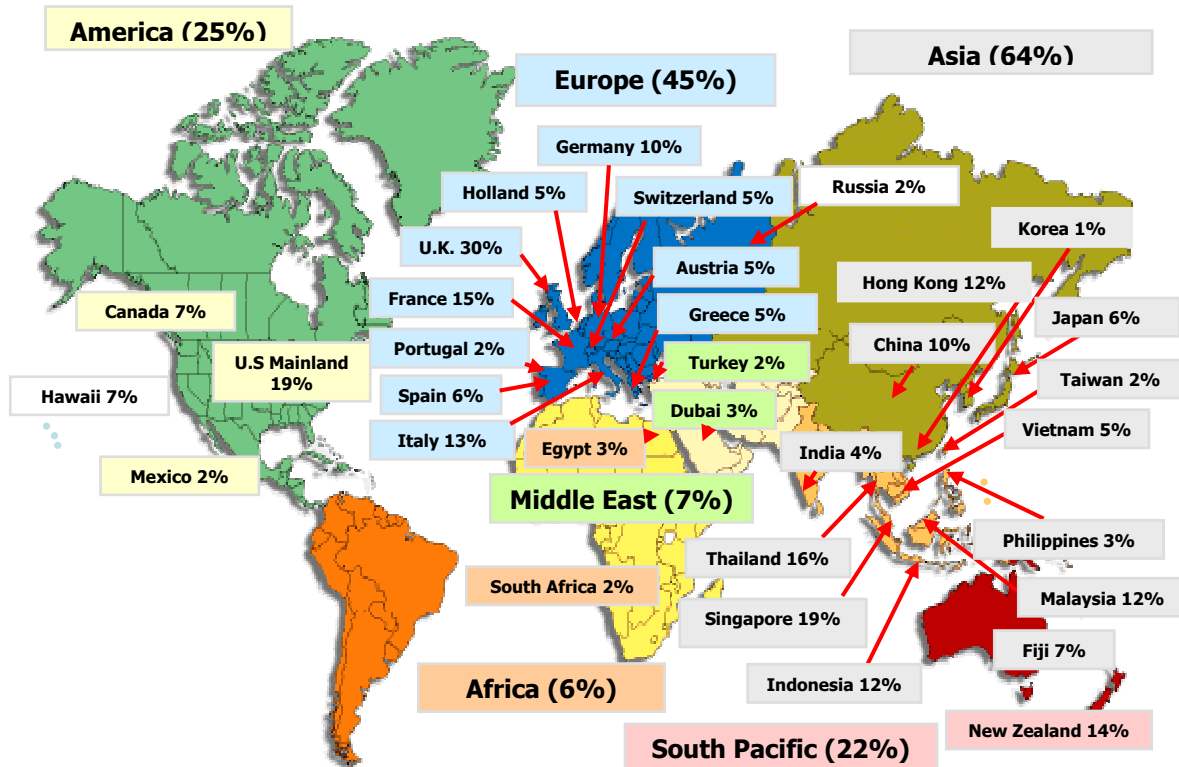
Consumer Surveys – Qualitative and Quantitative Analyses

Section 3: Destination Motivators

3.1 Current Destinations (Past 3 Years)

Over the past 3 years, Canada has attracted only 7% of Australian long-haul travellers, well below other popular destinations beyond Asia – Europe (45%), and the U.S. Mainland (19%). Asia drew as many as 64%.

EXHIBIT SECTION 3-1: LONG-HAUL COUNTRIES VISITED IN PAST 3 YEARS



Source: Quantitative Survey Q7¹

¹ Base=Past 3 year traveller (n=2,088)

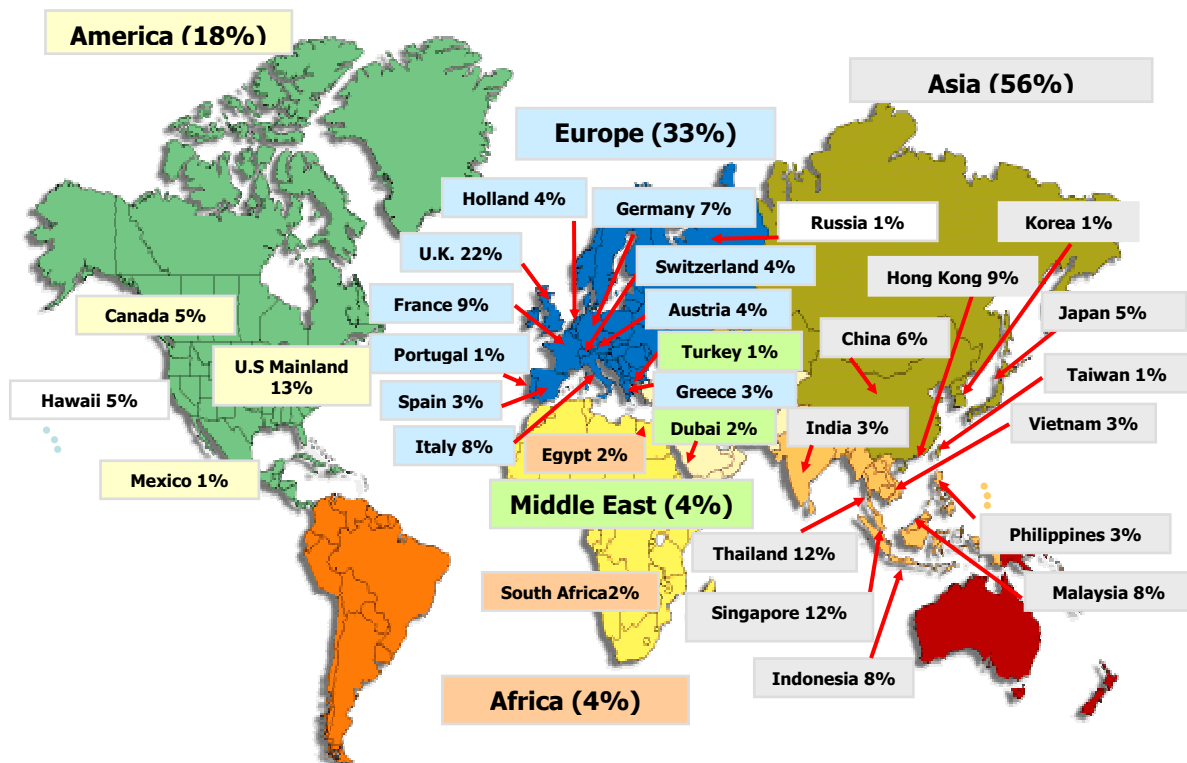
Q.7 During the past 3 years which of these countries or destinations outside Australia did you visit for pleasure and stayed for 4 nights or longer, if any?

3.2 Destination Market Share

Based on the most recent trip (more reflective of market share), the survey reports that Canada attracted only 5% compared with the long-haul leaders – Europe (33%), in particular the U.K. (22%), and U.S. Mainland (13%).

Asia captured over half of outbound trips beyond Oceania (56%).

EXHIBIT SECTION 3-2: LONG-HAUL COUNTRIES VISITED MOST RECENTLY



Source: Quantitative Survey Q8¹

¹ Base= those who have taken a most recent trip (n=2,088)

Q.8a Thinking about your **most recent** pleasure trip of four nights or longer to somewhere outside of Australia, New Zealand and the South Pacific, which of these places did you visit on that trip?

3.3 Destination Imagery – Focus Group Feedback

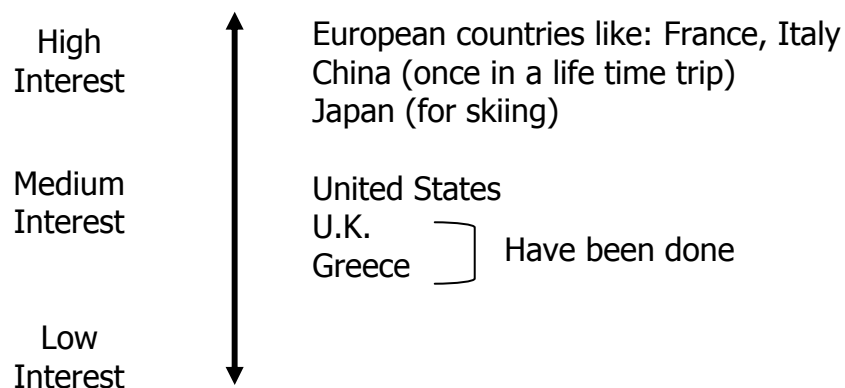
Australians tend to group long haul destinations as follows:

- UK
- Europe/Italy
- Eastern Med (Greece/Turkey)
- South America
- Canada/Alaska
- U.S. Mainland
- China
- Japan
- Africa/Egypt
- India

Each of these destinations provides a different type of vacation experience. The following section examines each of the listed competitor destinations in turn, showing what they offer and what perceptions Australians have of them.

Canada's main competitors are other Northern hemisphere countries – United States, Europe (U.K., Italy, France, Greece), China and Japan.

Level of interest in these countries varied.



3.3 Destination Imagery – Focus Group Feedback

3.3.1 U.K.

Australians see the UK as being quite different from the rest of Europe, since it is part of the commonwealth. The main attraction of going to the UK is the fact that it is part of Australia's heritage and history. Often a trip to the UK is combined with a trip to continental Europe, given the distance traveled and the desire to maximize the value of the trip by adding on extra destinations for additional diversity and colour.

Many Australians have UK ancestry and have been exposed to British culture all their lives. Australians have an affinity for all things "English" for this reason, along with a shared language and heritage. Most Australians will travel to the UK at some time in their lives—more so than to any other single destination. As a working holiday young Australians can easily obtain a work visa, and likewise Australians with UK grandparents have the right to legally work there for extended periods.

3.3.2 Europe/Italy

There is tremendous interest in traveling to Europe for its variety within "such a small space". Australians have a very high appreciation of a destination that provides great diversity, especially if it is within a relatively small area. They regard this variety of experience as value added when considering a long haul venue. This part of the equation stems directly from fact that Australians feel there is a lack of diversity within Australia and the surrounding short haul venues. Although Australians appreciate the rich cultural experience of emersion in Europe, they equally marvel at the benefit of having so many unique countries so close to each other. In summary, Europe has three main draws: history, art/architecture, and variety. These make it an extremely good value long haul destination.

Italy seems to attract the most interest and activity. This may be linked to the general appeal of all things Italian; food, wine, shopping, and the high proportion of Italians living in Australia. Australians feel a certain ease in Italy that they do not find as readily in France, for example. This may have to do with how Australians travel; they worry less about blending in culturally and more about enjoying the culture in their own "Aussie" way. It is also likely that Italians are perceived as friendly and relaxed, much the way that Australians are perceived. In contrast, the French are perceived as somewhat arrogant and superior. Hence, there were a few comments made about how the French are not very friendly. This comment was not made about the Italians.

Note: Australia has the largest Greek and Italian populations outside of Greece and Italy.

3.3 Destination Imagery – Focus Group Feedback

3.3.3 Eastern Med (Greece and Turkey)

These two destinations were always discussed in combination. This, again, is an example of Australians wanting to get value through variety.

Both countries are viewed as the same: a good sun/beach vacation with a lot of culture heritage, especially in the case of Turkey's history.

"The beaches are beautiful."

For some of the older participants, Greece is a little stale or played as a destination. Several commented that a lot of Australians have been there and that there is very little "WOW" factor to it.

"If you are at a party and you say that you are going to Greece people won't even notice, but if you say that you are going to Canada they will want to discuss it."

3.3.4 U.S. Mainland

There remains a healthy interest in the United States, especially from young travellers, with and without families. The draw is the variety and excitement offered by the big and famous cities. For those with families, the child friendly entertainment and theme parks provided a strong draw.

"New York is a great city."

"I think Vegas is great."

"There are things for kids to do there."

The United States biggest weakness is its overdeveloped commercialism and lack of authenticity. One of Canada's biggest strengths is that Australians believe Canada to be the opposite of this.

Even though the US has vast parks and beautiful scenery, it is perceived to be much less pure and untouched than Canada.

"You can't get away from the people there."

"There will be someone trying to sell you something."

Another issue with the US, which Canada does not suffer from, is that Australians are quite vocal about their dislike of Americans and their policies. This opinion was particularly strong among the older segment. A milder degree of this dislike was expressed by young participants as well.

"Americans are self absorbed."

3.3 Destination Imagery – Focus Group Feedback

3.3.5 China

Interest in China is largely based on interest in culture and history. A trip to China is on the wish list of many Australians, albeit low down the list. Frequently visits to China are combined with a “Shopping Junket” in Hong Kong, given proximity and flight schedules.

3.3.6 Japan

Japan seems to be gaining in popularity as a ski destination. Australians are attaining greater awareness of its ski product, and they are impressed.

“They have some very big slopes there.”

“I didn’t know that the skiing was so good there.”

Another benefit of skiing in Japan is that Australians get to experience a different culture at the same time, and that enhances the value of the trip.

Another minor benefit, which comes in handy for shorter duration ski vacations, is that they can travel in almost the same time zone.

That said: Japan is a premium destination perceived as being very expensive. While the history and culture are draws for some travellers, as a ski destination Canada offers strong competition. Japan is a completely different culture and language, and unlike Canada does not offer Australians the same sense of ease, comfort and familiarity.

Note: Visiting the Northern Hemisphere

As aforementioned, Australians can visit the Northern Hemisphere at any time, but prefer to avoid the “dead of winter” when the days are short and the winds are icy.

Even for skiing holidays March/April are popular periods—some participants who had been to Canada noted that in British Columbia in April you could conceivably ski in the morning and sail in the afternoon—**an opportunity that is afforded nowhere else in the world.**

3.3 Destination Imagery – Focus Group Feedback

3.3.7 Canada

The Core Appeal

At the core of Canada's appeal is its spectacular, breathtaking beauty. Elements contributing to this in the Australian mind are:

- Majestic Beauty
- Mountains
- Forests
- Abundant Wildlife
- Vast wilderness
- Clean and untouched landscapes

A very close second to Canada's beauty is the abundant recreational opportunities.

It is this unique combination of majestic beauty and vast recreational opportunities that elevates Canada's appeal. Australians understand what vastness is, as they experience it in their own country. They have seen far vistas, huge valleys, and mountain ranges. They are also very outdoorsy. They enjoy outdoor recreation, days at the beach, sailing, hiking, barbequing, etc.

Canada offers an "easy" destination, which is sufficiently different yet remarkably similar. While Canada has the same language, same attitude, sense of humour, way of living, living standards, economy, physical size, and urbanization, it is the virtual reverse of the Australian landscape and climate (e.g. cool not hot, moist not dry, green not brown/orange etc).

Australians are currently contending with a drought. They see their country as arid.

Therefore, another major appeal of Canada is its clean, fresh, moist and dewy air, forests and countryside. Australians get a sense that they can breathe and take in fresh forest-generated oxygen and moisture.

When Australians think of Canada, they imagine lush oxygen rich parks, forests and lakes that they can swim in; wilderness trails that they can trek and camp on; abundant wildlife that they can observe and photograph. That's when they become really excited, because that's when they realize the full potential of all of the recreational possibilities.

3.3 Destination Imagery – Focus Group Feedback

"I could camp with my son and become caveman-esque."

"I could get out into the clean cool nature and really let my spirit go."

This marriage of vast beauty and outdoor recreational opportunities ladders up to having a very inward intimate experience that is emancipating. Canada is green, lush and verdant – linking in with re-generation and rebirth (spiritual rejuvenation).

For men, they feel that they will have the opportunity to get in touch with basic animal instincts: run free and feel the wilds.

Women, on the other hand, feel that an outdoor recreational experience would give them the opportunity to let their spirits soar and be unleashed.

"I think my spirit would just break out."

"It's like magic!"

"I would just get such a high in all of that clean air and surroundings."

Friendly and Open-minded

Australians abroad are sensitive to whether or not they are being observed, in a welcome way. They much prefer to go to a country that they feel would embrace them. Several comments were made that Canadians are very friendly and accepting of others. Australians also feel that because Canada is part of the Commonwealth that there is a shared history, kindred spirit and brotherhood.

Culture

Australians are very aware of Canada's French/English culture, and are very curious about it. They find it to be exotic and interesting. This aspect of Canada should be played up in any communications plan. However, Australians in general have negative perceptions of the French, so French-Canadians should be promoted as combining the "best" of France and Canada.

3.3 Destination Imagery – Focus Group Feedback

West-coast Centric

Given their proximity to the west coast, Australians have a better knowledge of what to expect in BC than in central or the east coast of Canada. They have a high level of awareness and comprehension of Victoria and Vancouver Island, as well as B.C. coastal cruises, typically up to Alaska. Even so, they are still interested in visiting both central and eastern Canada, and many do view Canada as a legitimate vacation destination on its own. Many participants felt that they would, and could happily, spend two to three weeks visiting Canada without attaching a second destination like the US or Europe to the trip. However, as noted elsewhere, more Australian visitors combine Canada with a U.S. and/or Europe visit (74%) rather than visit Canada only (only 26%).

More education, communication and visibility of locations and attractions would help encourage Australians to extend their Canadian holiday and entice repeat travel to Canada.

Accommodations and Tourism Infrastructure

Australians have no doubt that Canada has excellent facilities and accommodations. The expectation is that the accommodation range and standards are largely equivalent to Australia. Those who have been to Canada assess cost structure to be very similar to Australia. Those who have yet to travel are less knowledgeable of the comparable pricing, which would be a selling point if understood.

Proximity and Relationship to the US

Although qualitatively Australians claim that they are somewhat indifferent to traveling to the U.S. (mainly because most had visited the U.S. before and the chaos of the L.A. airport (LAX) is overwhelming), quantitatively their behaviour suggested that combining trips to the U.S. and Canada could still be of interest.

A Welcome Change for a Stopover

Australians traveling to Europe are becoming quite tired of the “usual” connecting stopovers to break up their long flight. They are tired of Singapore and Hong Kong, as they are seen as places that are just for shopping.

3.3 Destination Imagery – Focus Group Feedback

They are also tired of LA. All said that they would welcome the opportunity to stop over in Vancouver. Several noted that the flight schedules are not very accommodating. They also complained that travel agents are not very inventive or imaginative when it comes to recommending unique stopovers and tend to stick with the usual layover options.

The idea of combining a trip to Canada with a “warm” stop over on the return journey has considerable appeal. It is also the case that older travellers and those traveling with young children **need** a stop over in order to break up the plane journey.

3.3.8 Recent Visitors to Canada

On the whole, recent visitors to Canada who participated in the research were extremely satisfied with their trips.

While many had been initially drawn by one particular attraction (e.g. skiing, Rocky Mountain Railway, wilderness, cruising and so on), most travellers noted that there were many additional attractions that they only became aware of **after** arriving in Canada. Many of these were in central and eastern Canada (Montreal, Calgary Stampede, Niagara Wine Country and Atlantic).

While on one hand this may encourage multiple repeat visits, the first time visitor or those still contemplating their first trip to Canada may not be fully aware of the complete range of attractions, meaning that they may plan a shorter trip or ultimately select an alternative destination.

The opportunity to experience various recreational activities (camping, hiking, and cycling) in an extraordinarily beautiful and majestic country is therefore an extremely important motivation for the CTC to build into the positioning strategy.

Expectations and Return Trips

For the majority, the visit to Canada exceeded their expectations and virtually all wanted to return.

On their next trip, they would like to experience the places they missed or didn't know about when they planned their previous visit. This represents different things to different people, covering the range of Canada's offerings. For example, it could be going on the Rocky Mountains Railway, or visiting Banff and Lake Louise or Montreal/Quebec or Niagara Falls.

3.3 Destination Imagery – Focus Group Feedback

Overview Learnings

To Australians Canada is:

- A bit of a secret.
- Not highly visible in terms of marketing/promotion.
- Perceived to the “uninitiated” as a bit one dimensional, i.e. It’s all about skiing/snow or beauty.
- Similar to Australia (but different!!)

In terms of planning travel, Australians are;

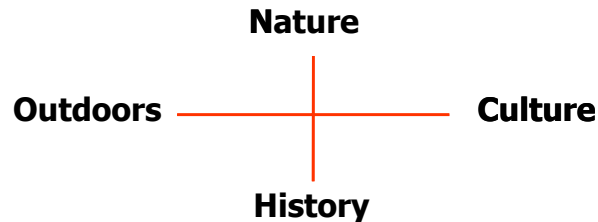
- Independent
- Internet Savvy
- Confident
- Knowledgeable

While older travellers are more inclined to use Travel Agents and participate in tours, most participants wanted to plan their own itinerary and expressed their desire to plan their own holiday, as opposed to having an agent plan it. Accordingly, travel agents were primarily used to get the best available pricing and co-ordinate challenging flight schedules.

The fundamental trigger for visiting Canada is the desire to unleash the spirit/animal within. And, this is best done through doing a variety of recreational activities in a stunningly beautiful environment.

3.4 Perceptual Brand Map

The Correspondence Analysis on the next page correlates destination imagery ratings on two computer driven axes:



Each of the attributes is plotted on the map with the positioning of each destination. The map, through multivariate analysis, illustrates the relative position of each destination and each attribute, based on their ratings on each. In other words, the more a particular destination is uniquely associated with an attribute the closer it is charted to it.

Brand Positioning

Europe

In the Southeast quadrant, Europe is a blend of culture and history

U.S.

A sense of excitement exists in the USA's "neighbourhood", a source of exciting stories, new and unique experiences, friendly people.

S.E. Asia

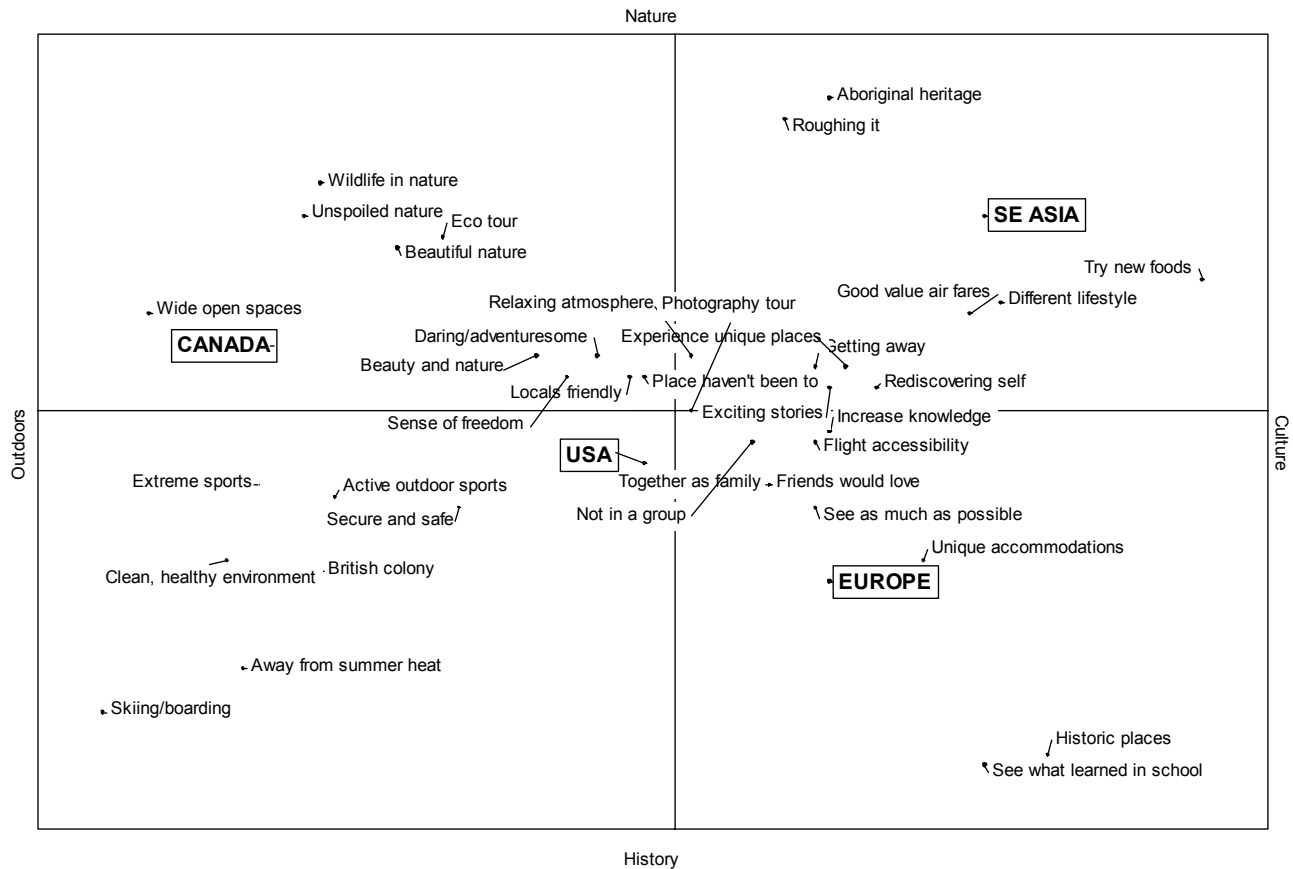
Culturally different, S.E. Asia provides an opportunity to get away, try new foods, on an affordable vacation.

Canada

Far to the Outdoors end of the spectrum, Canada essentially "owns" wide open spaces, outdoor activities and beautiful nature.

3.4 Perceptual Brand Map

EXHIBIT SECTION 3-3: BRAND ATTRIBUTE MAP



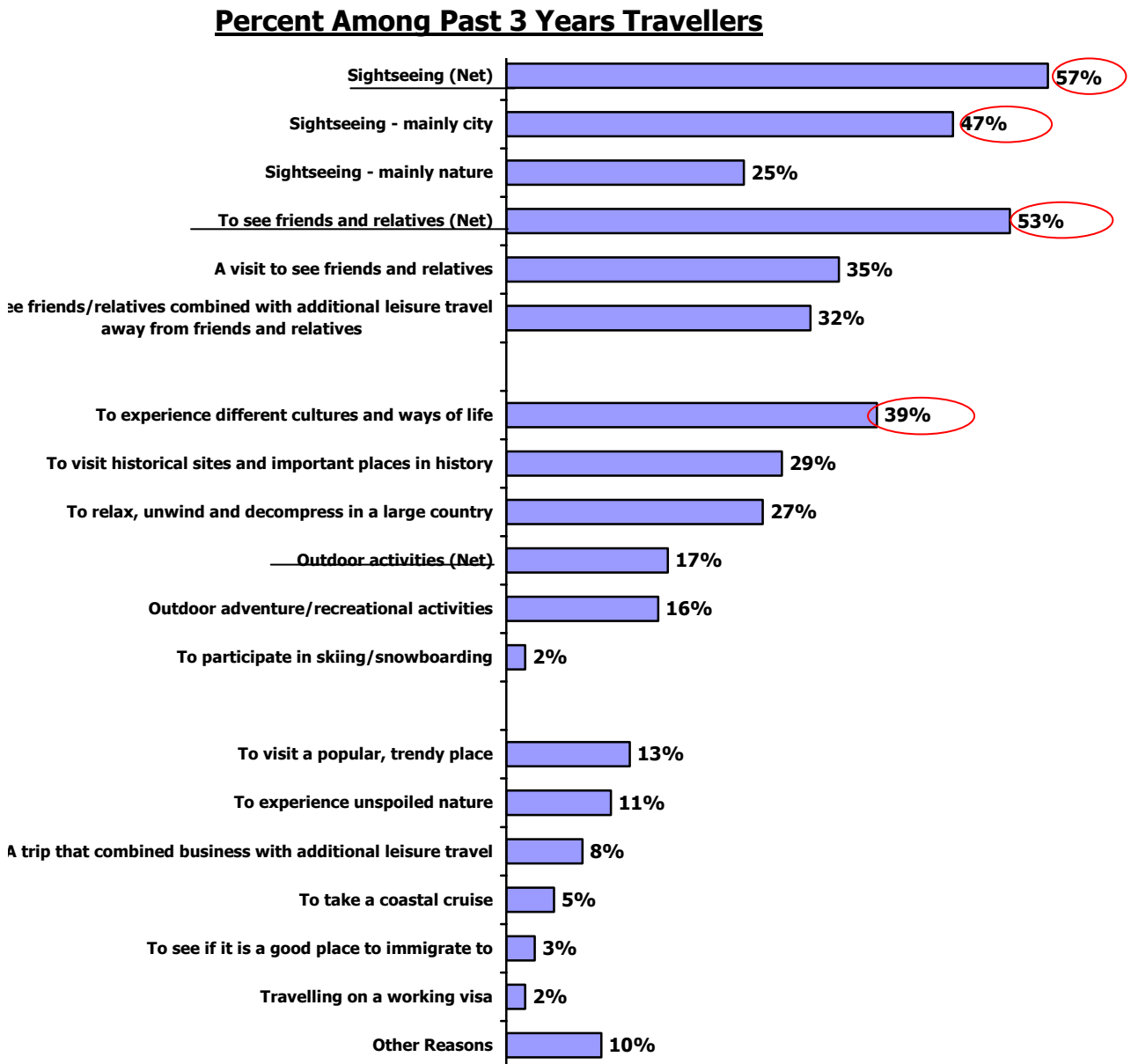
Source: Quantitative survey Q.21

Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, or anything else that you have seen, heard or read.

3.5 Purpose of Trip - All

Beyond general sightseeing, VFR is a major factor for Australians in choosing their destinations (53%). However, the other benefits of a trip abroad are equally powerful motivators – experiencing different cultures and ways of life, seeing historical sites and, for some, outdoor activities.

EXHIBIT SECTION 3-4: ALL REASONS FOR TRAVEL – BY ALL DESTINATIONS



Source: Quantitative Survey Q.9a¹

¹ Base=n=2,088

Q.9a What were your reasons for travelling to (Q.8a DESTINATION)

3.6 Purpose of Trip – All – By Destination

With English speaking Northern Hemisphere countries, personal connections play a major role in destination choice. VFR is a reason for travel for as many as 82% visiting the U.K., still over half for the U.S. (60%) and Canada (56%).

Sightseeing and getting out in nature, especially for recreational activities, are prime motivators for Canada – far higher than for any other country, reflecting earlier findings. Skiing, in particular, draws 15% to Canada.

EXHIBIT SECTION 3-5: ALL REASONS FOR TRAVEL – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
All Reasons For Taking Trip					
<u>Sightseeing (Net)</u>	56	62	63	61	70
Sightseeing - mainly city	46	56	58	55	55
Sightseeing - mainly nature	25	22	23	22	37
<u>A visit to see friends and relatives (Net)</u>	47	75	82	60	56
A visit to see friends and relatives	31	47	52	39	38
A visit to see friends/relatives combined with additional leisure travel away from friends and relatives	27	48	53	36	32
To experience different cultures and ways of life	46	37	35	24	35
To visit historical sites and important places in history	25	45	48	26	27
To relax, unwind and decompress in a large country	33	17	15	24	28
<u>Any Outdoor Activities (Net)</u>	17	12	11	19	35
Outdoor adventure/recreational activities	16	11	10	16	31
To participate in skiing/snowboarding	2	2	2	6	15
To visit a popular, trendy place	12	9	7	23	16
To experience unspoiled nature	10	8	10	12	27
A trip that combined business with additional leisure travel	9	5	4	11	7
To take a coastal cruise	4	4	3	6	10
To see if it is a good place to immigrate to	3	3	4	3	6
Travelling on a working visa	2	2	4	2	7
Other Reasons	11	9	8	9	8

Source: Quantitative Survey Q.9a

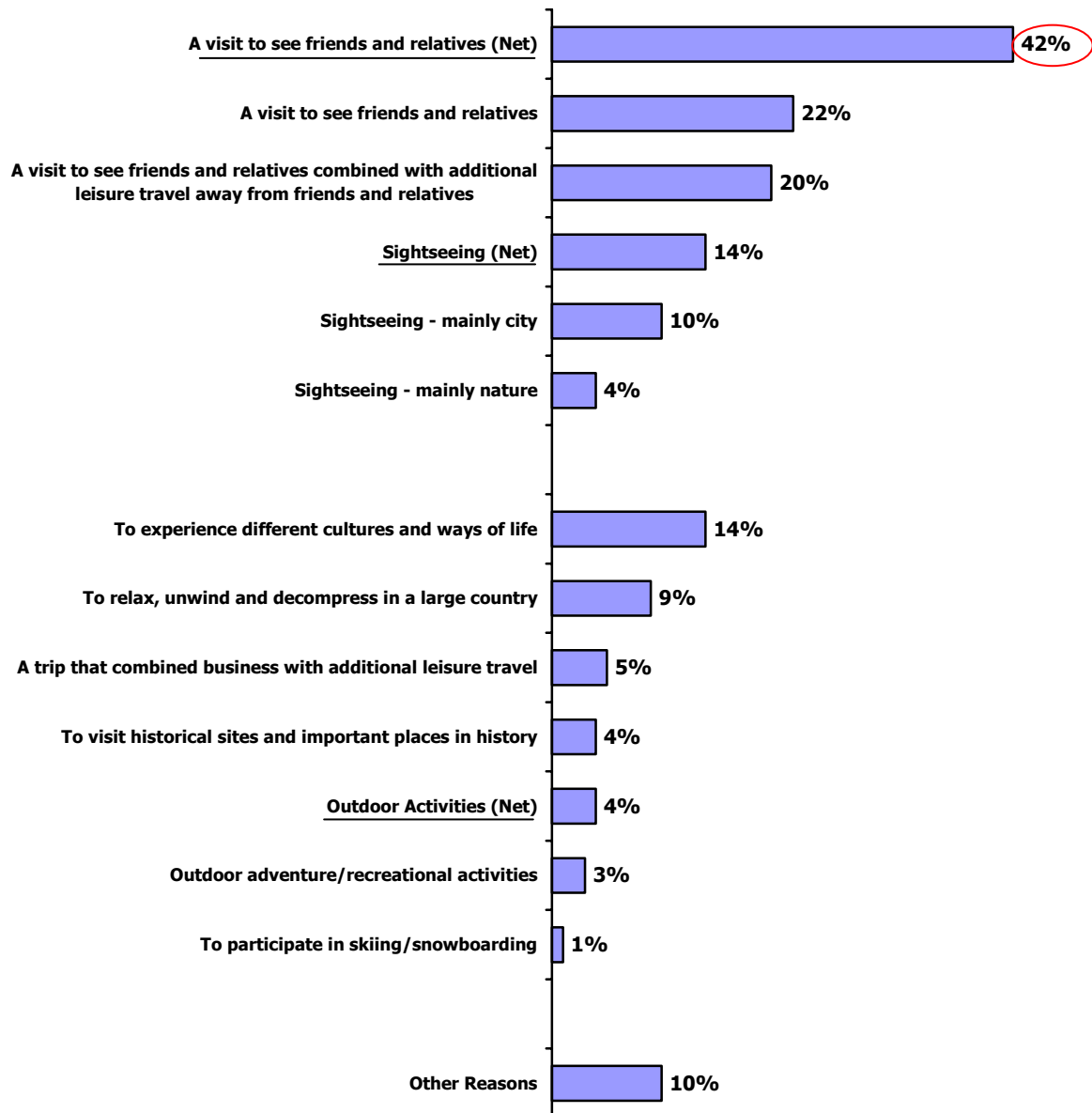
Q.9a What were your reasons for travelling to (Q.8a DESTINATION)

3.7 Purpose of Trip – Main

VFR (42%) handily edges out sightseeing (14%), to experience cultural and different ways of life (14%) and outdoor activities (4%) as the main purpose of trip.

EXHIBIT SECTION 3-6: MAIN PURPOSE OF TRIP – BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.9b¹

¹Base n=2,088

Q. 9b Which of those was your **main reason** for travel?

3.8 Purpose of Trip – Main – By Destination

In spite of the appeal of Canada's nature and outdoor activity opportunities, VFR dominates the main reason for visiting (37%).

Outdoor activities are more of a side benefit for current visitors (a reason for visiting for 35%, but the main reason for only 7% of Canadian visitors).

EXHIBIT SECTION 3-7: MAIN PURPOSE OF TRIP – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
Main Reasons For Taking Trip					
<u>A visit to see friends and relatives (Net)</u>	<u>36</u>	<u>58</u>	<u>63</u>	<u>44</u>	<u>37</u>
A visit to see friends and relatives	19	27	30	25	18
A visit to see friends/relatives combined with additional leisure travel away from friends/relatives	17	31	33	19	19
<u>Sightseeing (Net)</u>	<u>13</u>	<u>13</u>	<u>12</u>	<u>23</u>	<u>23</u>
Sightseeing - mainly city	10	11	9	<u>20</u>	14
Sightseeing - mainly nature	3	2	3	3	<u>10</u>
To experience different cultures and ways of life	<u>18</u>	11	9	5	8
To relax, unwind and decompress in a large country	<u>14</u>	2	1	4	4
A trip that combined business with additional leisure travel	5	2	2	7	3
To visit historical sites and important places in history	2	7	6	3	3
<u>Outdoor Activities (Net)</u>	<u>3</u>	<u>2</u>	<u>2</u>	<u>4</u>	<u>7</u>
Outdoor adventure/recreational activities	3	2	2	2	2
To participate in skiing/snowboarding	*	1	*	2	<u>5</u>
To take a coastal cruise	1	1	*	1	3
To visit a popular, trendy place	1	1	*	3	1
Travelling on a working visa	1	1	1	1	<u>4</u>
To see if it is a good place to immigrate to	1	1	1	*	2
To experience unspoiled nature	*	--	--	*	2
Other Reasons	6	3	3	5	3

Source: Quantitative survey Q.9b

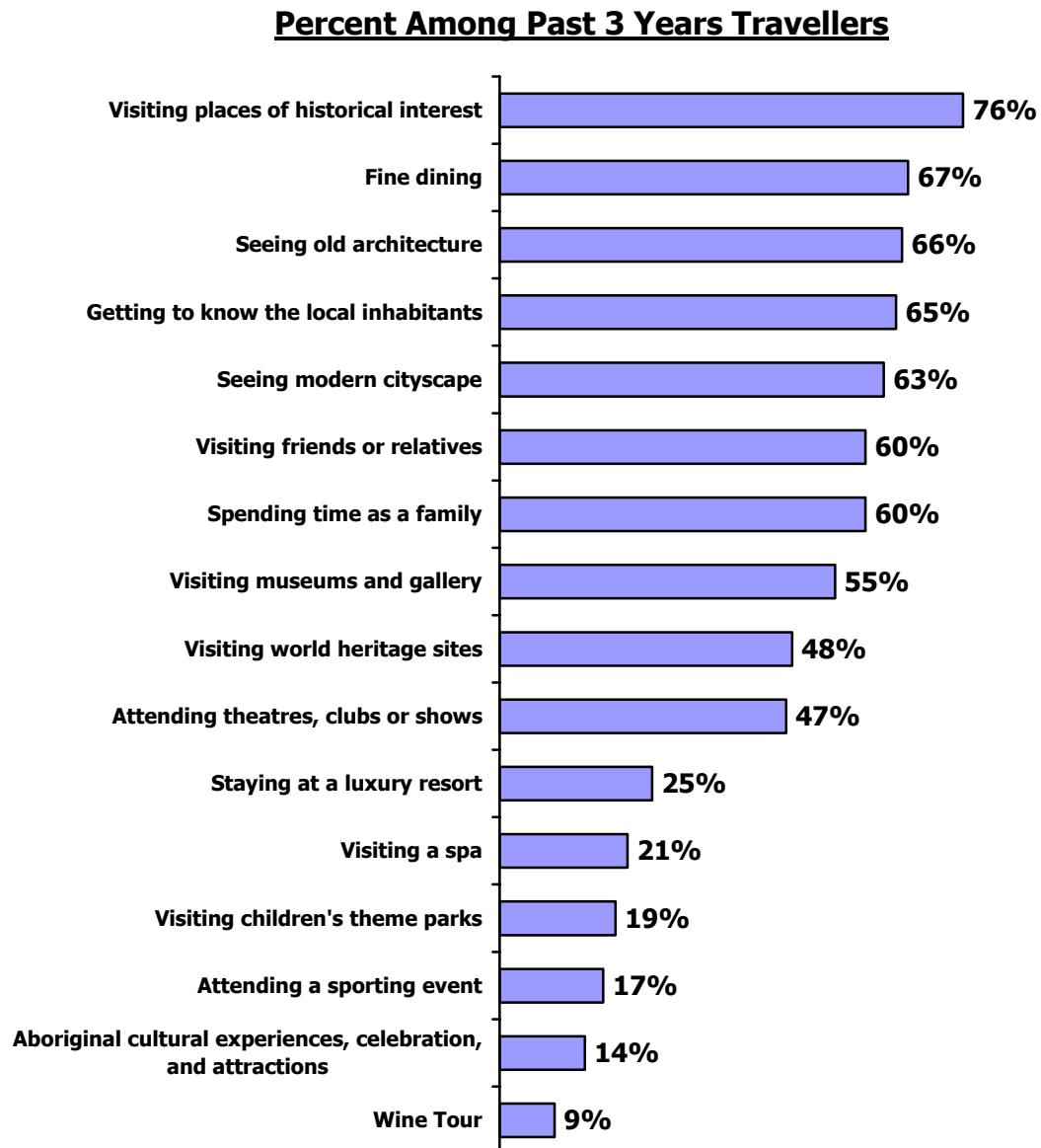
*Less than 0.5%

Q. 9b Which of those was your **main reason** for travel?

3.9 Destination Activities – Culturally Oriented

Australians enjoy getting involved with the people and their lifestyle when travelling, as well as seeing places of historical and cultural significance.

EXHIBIT SECTION 3-8: ACTIVITIES PARTICIPATED ON TRIP – CULTURALLY ORIENTED – BY ALL DESTINATIONS



Source: Quantitative Survey Q.19a¹

¹ Base: n=2,088

19a) Which, if any, of the following activities did you participate in while on that trip to **(DESTINATION IN Q. 8a)**

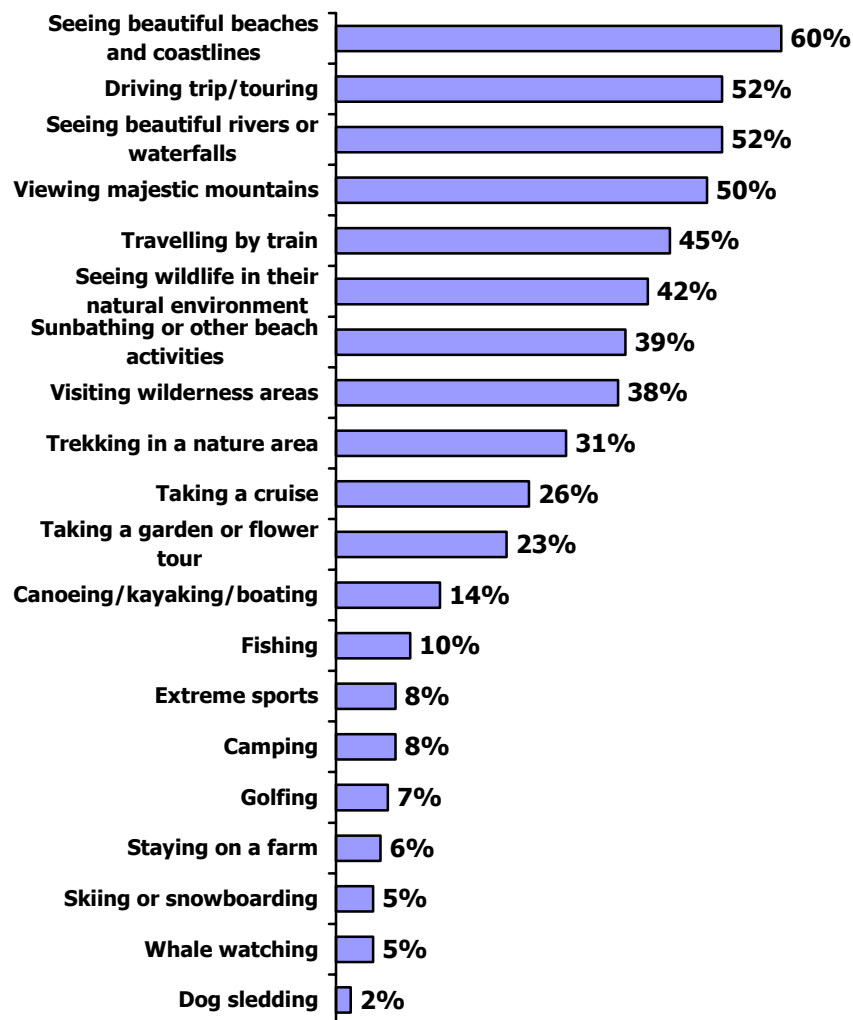
3.10 Destination Activities – Nature Oriented

On the natural side, Australians truly enjoy the freedom and flexibility of driving and touring and taking in natural beauty visually.

Soft adventure appeals to a minority, trekking the most popular specific activity.

EXHIBIT SECTION 3-9: ACTIVITIES PARTICIPATED ON TRIP – NATURE ORIENTED – BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19a¹

¹Base: n=2088

3.11 Destination Activities – Culturally Oriented – by Destination

Europe destined visitors are far more active in viewing historical and cultural sites than North American bound Australians.

The U.S. is more about modern cities and theme parks, while Canadian visitors show particular interest in spas, aboriginal attractions and sporting events. However, in terms of cultural activities generally, involvement in both the U.S. and Canada is quite similar.

EXHIBIT SECTION 3-10: ACTIVITIES PARTICIPATED ON TRIP – CULTURALLY ORIENTED – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
Culturally Oriented Activities Participated In					
Visiting places of historical interest	74	88	90	77	77
Fine dining	68	65	64	64	65
Seeing old architecture	63	85	84	60	61
Getting to know the local inhabitants	67	67	62	61	65
Seeing modern cityscape	62	68	71	81	77
Visiting friends or relatives	54	81	88	67	66
Spending time as a family	57	70	74	66	53
Visiting museums and gallery	50	76	76	57	62
Visiting world heritage sites	43	63	64	46	56
Attending theatres, clubs or shows	46	53	56	60	53
Staying at a luxury resort	31	13	12	25	26
Visiting a spa	28	11	10	12	20
Visiting children's theme parks	19	15	13	41	24
Attending a sporting event	15	20	21	28	36
Aboriginal cultural experiences, celebrations, and attractions	17	9	7	12	28
Wine tour	7	16	12	12	15

Source: Quantitative Survey Q.19a

19a Which, if any, of the following activities did you participate in while on that trip to **(DESTINATION IN Q. 8a)**

19a Which, if any, of the following activities did you participate in while on that trip to **(DESTINATION IN Q. 8a)**

3.12 Destination Activities – Nature Oriented – By Destination

Taking in nature is unquestionably where Canada stands apart from other destinations – particularly in “wilderness” areas and in outdoor activities.

EXHIBIT SECTION 3-1 1: ACTIVITIES PARTICIPATED ON TRIP – NATURE ORIENTED – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Nature Oriented Activities Participated In</u>					
Seeing beautiful beaches and coastlines	60	58	60	61	57
Driving trip/touring	47	62	66	61	62
Seeing beautiful rivers or waterfalls	50	55	55	53	82
Viewing majestic mountains	47	51	46	55	75
Travelling by train	45	69	72	34	46
Seeing wildlife in their natural environment	42	34	34	47	67
Sunbathing or other beach activities	45	26	24	36	27
Visiting wilderness areas	37	33	33	44	64
Trekking in a nature area	31	28	26	30	51
Taking a cruise	29	24	20	19	30
Taking a garden or flower tour	27	24	25	13	28
Canoeing/kayaking/boating	16	10	9	12	27
Fishing	11	7	6	9	15
Extreme sports	10	6	4	5	14
Camping	7	8	8	10	16
Golfing	8	5	6	6	9
Staying on a farm	6	8	5	5	10
Skiing or snowboarding	4	5	3	8	27
Whale watching	4	2	2	9	18
Dog sledding	3	2	1	4	12

Source: Quantitative Survey Q.19a

19a Which, if any, of the following activities did you participate in while on that trip to
(DESTINATION IN Q. 8a)

3.13 Destination Rating

The destination ratings provide a clear view of Canada's strengths and weaknesses vis-à-vis its three primary competitors.

EXHIBIT SECTION 3-12: CANADA'S STRENGTHS AND WEAKNESSES VS. COMPETITORS

	<u>Vs. U.S.</u>	<u>Vs. Europe</u>	<u>Vs. South East Asia</u>
Canada's Strengths	<ul style="list-style-type: none"> Experiencing unspoiled nature, wildlife viewing in a wide, spacious outdoor environment A clean, healthy environment Skiing/snowboarding Getting away from summer heat (cool) Feeling a sense of freedom Secure and safe Relaxing atmosphere 	<ul style="list-style-type: none"> Experiencing unspoiled nature, wildlife viewing, in a wide, spacious outdoor environment 	<ul style="list-style-type: none"> Being in a clean, healthy environment Skiing/snowboarding Getting away from summer heat (cool) Feeling safe and secure Wide, spacious, natural environment Opportunity for active outdoor sports
Canada's Weaknesses	<ul style="list-style-type: none"> Slightly poorer flight accessibility Fewer important historical sites 	<ul style="list-style-type: none"> Fewer places important in history Less likely to see first hand what I learned in school Less opportunity to stay in accommodation unique to that country Less opportunity to increase my knowledge Less opportunity to see so much in limited time Poorer flight accessibility 	<ul style="list-style-type: none"> Less opportunity to try new foods Less of a contrasting different lifestyle More expensive airfares
Summary	<ul style="list-style-type: none"> Canada is way ahead in experiencing a natural environment It is also superior as a cool, green place to go during Australia's summer heat 	<ul style="list-style-type: none"> Canada's advantage is dominated by its natural environment Weaknesses are on the cultural, historic, educational side 	<ul style="list-style-type: none"> Canada is way ahead in experiencing a natural environment It is also superior as a cool, green place to go during Australia's summer heat, as with the U.S.

3.13 Destination Rating

EXHIBIT SECTION 3-13: DESTINATION RATING

	Among Those Who Claimed Each Attribute Very/Somewhat Important When Considering a Trip			
	Southeast Asia	Europe	United States	Canada
	%	%	%	%
<u>Attribute Applies Extremely Well to Each Destination</u>				
Good value air fares	55	50	39	35
Enjoying a relaxing atmosphere	44	51	26	48
Feeling secure and safe	27	53	34	53
Opportunity to visit a place I have not been to before	48	57	44	57
Experiencing a different country's lifestyle	64	61	35	41
Opportunity to experience unique places	58	66	40	50
Local people are friendly and welcoming toward Australians	47	53	47	55
Feeling a sense of freedom	37	47	30	50
Opportunity to increase my knowledge	50	63	43	46
Getting away from the demands of home	52	55	40	45
Seeing as much as possible in the time available	41	62	43	40
Opportunity to try new foods	67	60	26	31
Being inspired by beauty and nature	44	55	34	62
Being in a clean, healthy environment	18	48	35	59
Being together as a family	41	59	40	41
Great flight accessibility	51	63	51	44
Travelling not in a group to provide more flexibility and independence	41	54	41	42
Surrounded by beautiful, unspoiled nature	39	39	25	60
Coming home with exciting travel stories	53	62	45	49

Source: Quantitative Survey Q.21

Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, or anything else that you have seen, heard or read.

3.13 Destination Rating

	Among Those Who Claimed Each Attribute Very/Somewhat Important When Considering a Trip			
	Southeast Asia	Europe	United States	Canada
	%	%	%	%
<u>Attribute Applies Extremely Well to Each Destination</u>				
Seeing places important in history	32	79	36	25
Feeling a wide, spacious outdoor environment	27	31	32	56
Seeing wildlife in nature	36	28	29	57
Visiting a place my friends would love to see	40	59	36	42
Experiencing unspoiled nature	36	33	26	58
Staying in accommodations unique to that country (e.g. castle, log cabin, etc.)	38	66	21	36
Rediscovering myself	39	46	29	34
Seeing first hand what I learned in school	25	57	31	22
Getting away from the summer heat	15	49	28	45
Photography tour	48	58	42	51
Being daring and adventuresome	37	42	34	41
To experience aboriginal heritage and attractions	39	22	23	28
Experiencing another British colony	15	38	16	31
Participating in active outdoor sports	22	37	38	44
Roughing it	34	27	20	28
Eco tour	34	32	22	40
Enjoying alpine (downhill) skiing or snowboarding	11	45	32	51
Extreme sports	23	36	33	34

Source: Quantitative Survey Q.21

- Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, or anything else that you have seen, heard or read.

3.14 Australia--Product Benefit Laddering

Insignia's Inner Consciousness Laddering Model draws out the "higher order" benefits that travellers are seeking in a Canadian vacation.

The hierarchy process:

- ♦ Begins with fundamental products or activities sought;
- ♦ Then uncovers the benefits sought by experiencing those products/activities;
- ♦ And finally, at the highest level, the personal values that are being fulfilled by the experiences.

For Australians, the Canadian vacation experience at the product/activity level is primarily nature focused with a significant emphasis on soft adventure.

At the Benefits level, these nature based experiences lead to:

- ♦ Rejuvenation and emotional revival
- ♦ Freedom / emancipation
- ♦ Renewal of the body and mind

At the highest order, the Value received is:

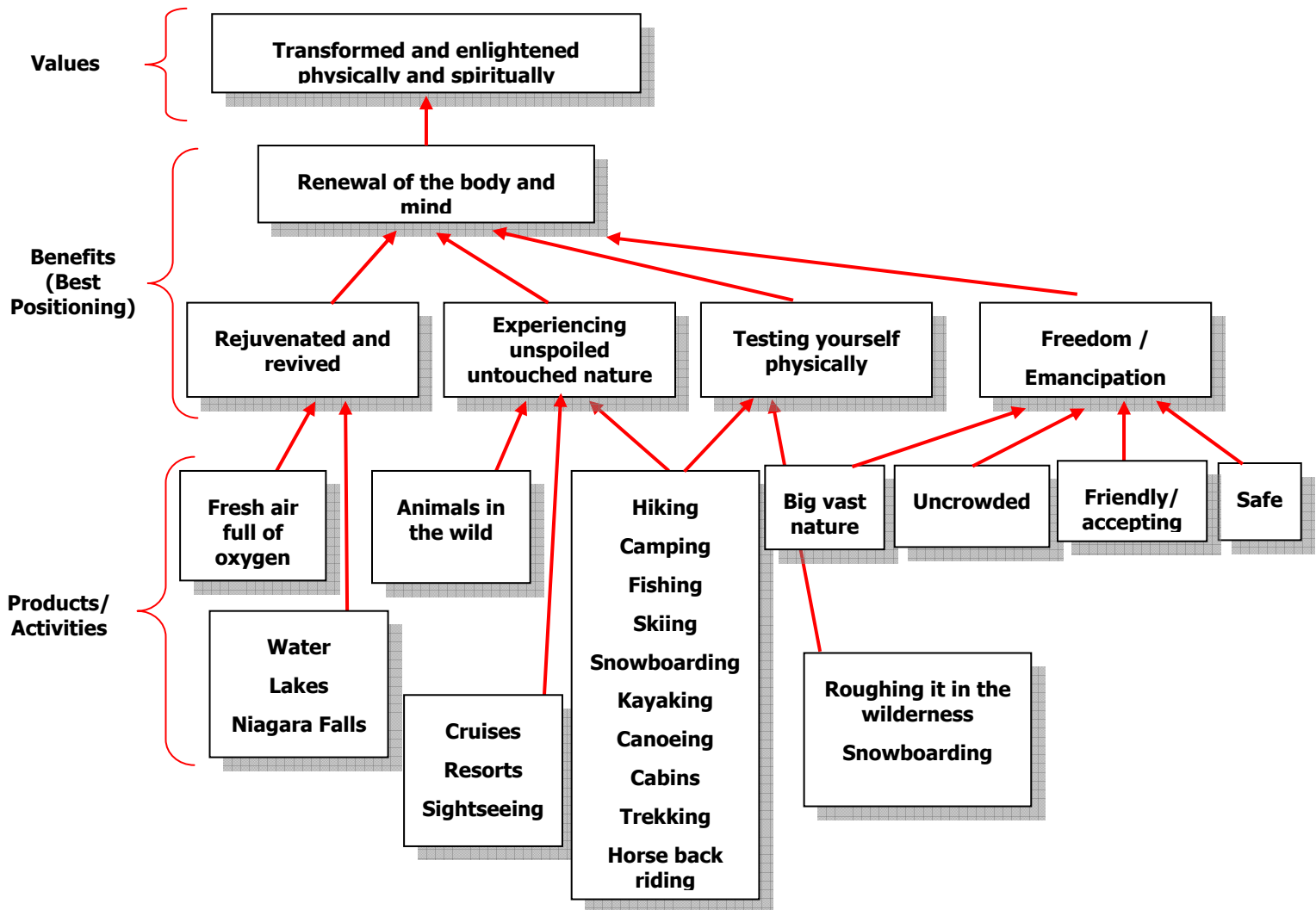
- ♦ Physical and spiritual enlightenment and transformation
- ♦ In other words, the traveller feels refreshed and rewarded by their emersion into Canada's natural environment.

Implications

The best way to position Canada's nature based products is to focus on the physical and emotional rewards that they provide.

3.14 Australia--Product Benefit Laddering

Nature Focused



3.14 Australia--Product Benefit Laddering

Opportunities

The higher order benefits that Australians feel emotionally when they ladder up their perceived value from travelling to Canada are illustrated in photographs they chose (from a battery of 150). Canada is a rejuvenating, soul inspiring experience.

"Canada is good for your soul"

"Makes you appreciate life again"

"Nature and my spirit meet"

"Transformed and enlightened"

"A soul tour"



**Banff Big Scale
Vast**



**Scale
Inspiring in big nature**

3.14 Australia--Product Benefit Laddering

Opportunities

Positioning should take advantage of the belief that Canada is less crowded than the U.S., Europe and Japan. This feeds into the “soul fulfillment” and implies fewer line-ups on the ski slope or in cities and events.



**Total # of
nights in
Canada**



**Mountains
Perfect scene even without the golf**



**Mini Europe
French**



**Illusion of crisp white ice on
trees**

3.14 Australia--Product Benefit Laddering

Opportunities

Also, there is an opportunity to take advantage of Canada's perceived bigger scale and vastness in nature as a point of difference to the competition. The bigger the nature the higher the soul soars and the more unique the experience.

"You have a greater understanding of why you are on the planet"



"Scale"
"Exciting"

3.15 Summary

Against its main competitors, the U.S. Europe and S.E. Asia, Canada's Unique Selling Proposition (U.S.P.) is unquestionably nature related:

- For nature loving Australians, Canada provides a green, lush, fresh environment in sharp contrast to the Australian landscape (cool not hot, moist not dry, green not brown (orange), especially in the current drought conditions.
- They imagine lush, oxygen rich parks, forests and lakes that they can swim in, wilderness trails that they can trek and camp on, abundant wildlife they can observe and photograph. That's when they become excited and realize the full potential of all the recreational possibilities.

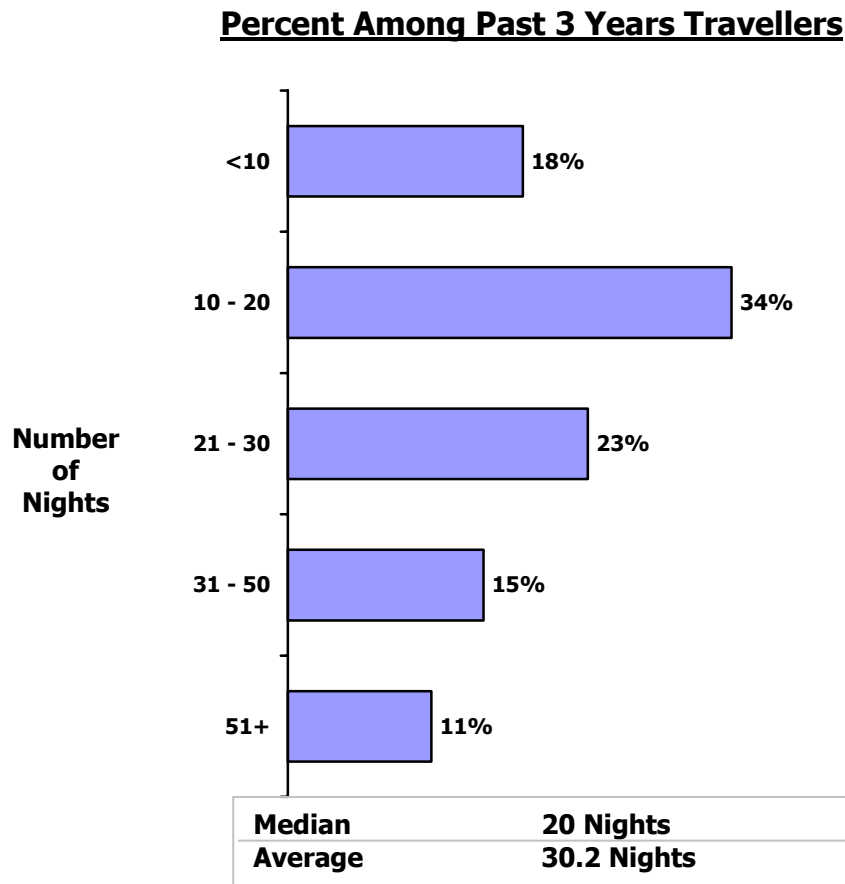
Section 4: Destination Trip Profile

4.1 Duration

When Australians travel beyond Oceania, they tend to go for some time – median of 3 weeks, average of one month. This correlates with the qualitative findings.

Australians have a lot of vacation time. They receive a minimum of four weeks (20 days) a year of paid leave. Additionally, there are approximately 10 days of public holidays per year. In total, the average Australian takes at least four full vacation weeks a year. Families with school age children or occupations related to public education are often limited by scheduled school holiday periods. These differ state to state, but follow the pattern of 6 weeks in December/January, 2 weeks in April, 2 weeks in July and 2 weeks in October.

EXHIBIT SECTION 4-1: NUMBER OF NIGHTS AWAY FROM HOME – BY ALL DESTINATIONS



Source: Quantitative Survey Q.10a¹

¹ Base: n=2,088

Q.10a On that trip to **(Q. 8a) DESTINATION** how many nights, in total, were you away from home?

4.2 Duration – By Destination

Australians visiting either Europe or North America have a median time away of one month.

Note that Canadian visitors include a significant long-stay segment – 24% travelling for 51 nights or longer. This pulls the average duration away, up to 54.5 nights.

However, as discussed later and noted below, not all of this time is spent in Canada.

EXHIBIT SECTION 4-2: NUMBER OF NIGHTS AWAY FROM HOME – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Number of Nights</u>					
<10	23	7	4	7	10
10 - 20	36	20	16	30	23
21 - 30	20	29	31	26	24
31 - 50	12	27	28	19	19
51+	10	18	21	18	24
Median # of nights	15	30	30	27	29
Average # of nights	27.6	41.2	46.0	41.0	54.5

Source: Quantitative Survey Q.10a



Nights Spent in Canada	
	#
Median	12
Average	27.5

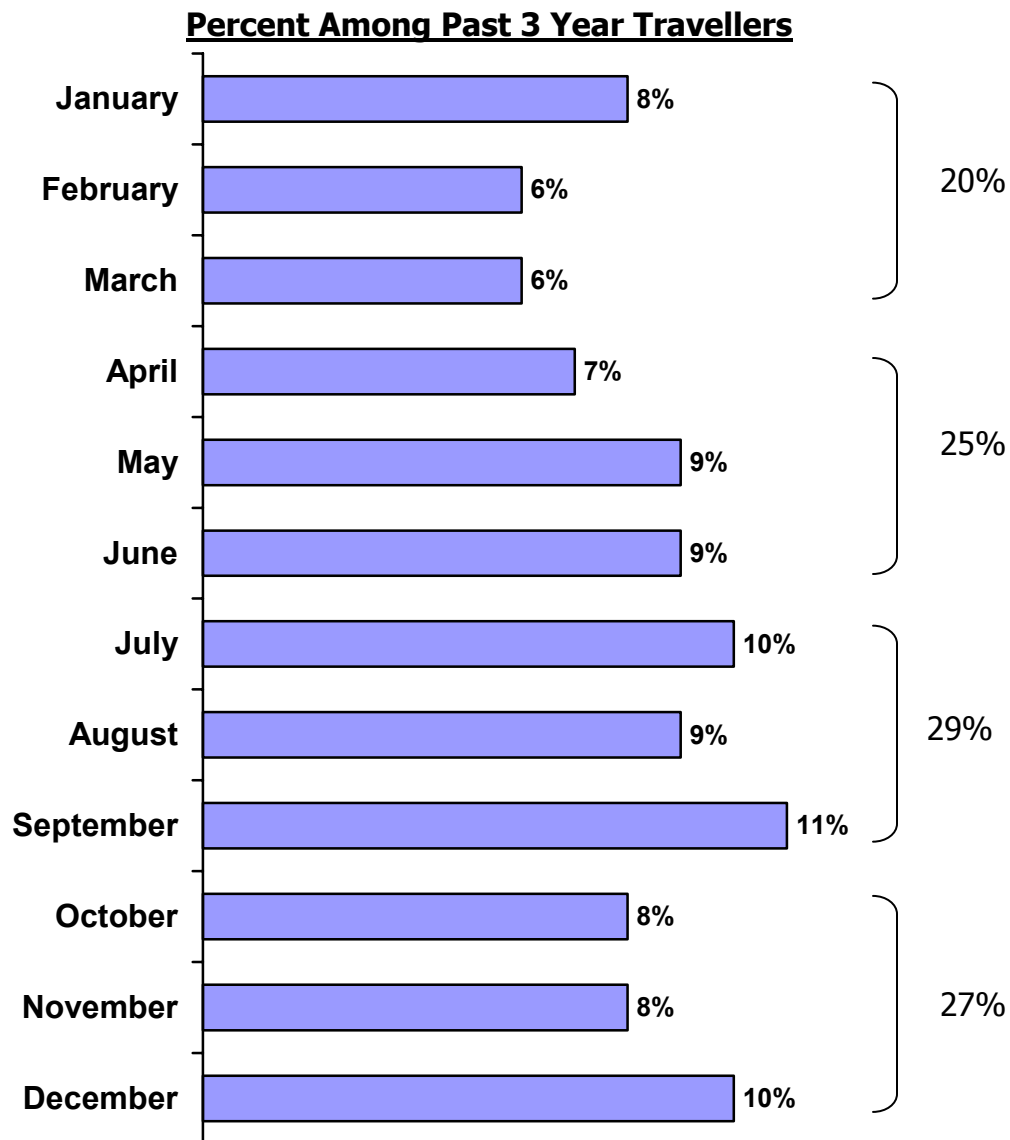
Q.10a On that trip to **(Q. 8a) DESTINATION** how many nights, in total, were you away from home?

Q.10b **(IF CANADA IN Q.8a, ASK)** How many nights, in total, did you spend in Canada?

4.3 Time of Travel

Australians venture overseas year round – almost equally split by season although a little less during their summer (20% during the first quarter).

EXHIBIT SECTION 4-3: MONTH OF TRAVEL – BY ALL DESTINATIONS



Source: Quantitative Survey Q.11¹

¹ Base=n=2,088

Q.11 And when did you take that trip to **(DESTINATION IN Q.8a)?**

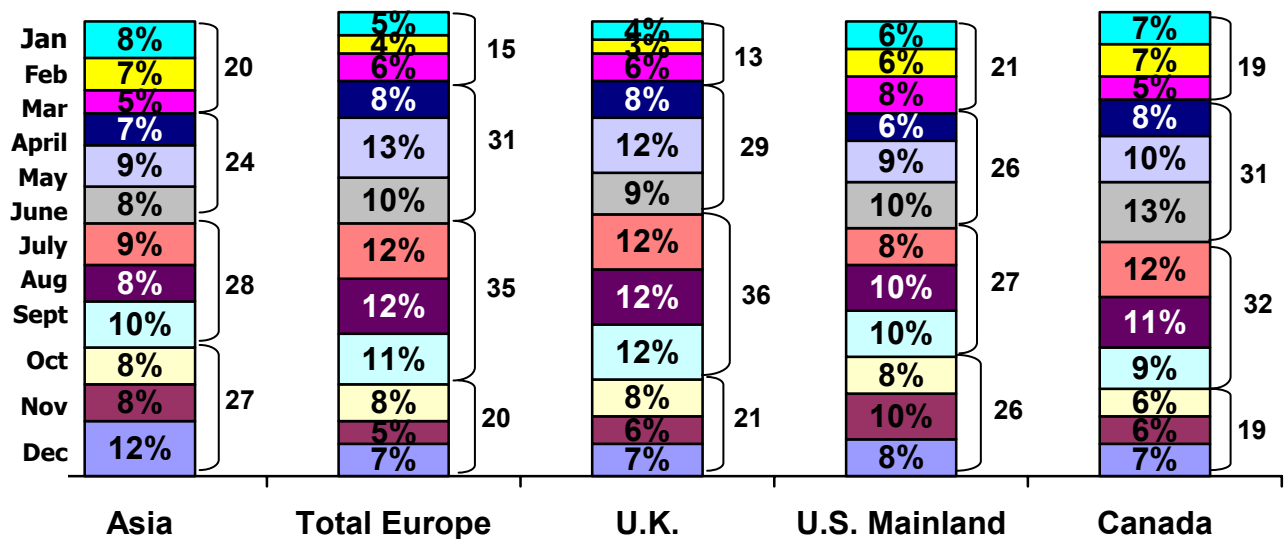
4.4 Time of Travel – By Destination

Even though Canada would be an ideal Australian summer destination (being cool and green), visitors tend to arrive during the second and third quarter – Australia’s fall and winter. The same pattern applies to Europe and the U.K.

U.S. and Asia have more of a year round appeal.

EXHIBIT SECTION 4-4: MONTH OF TRAVEL – BY DESTINATION

Percent Among Travellers Visiting Each Destination



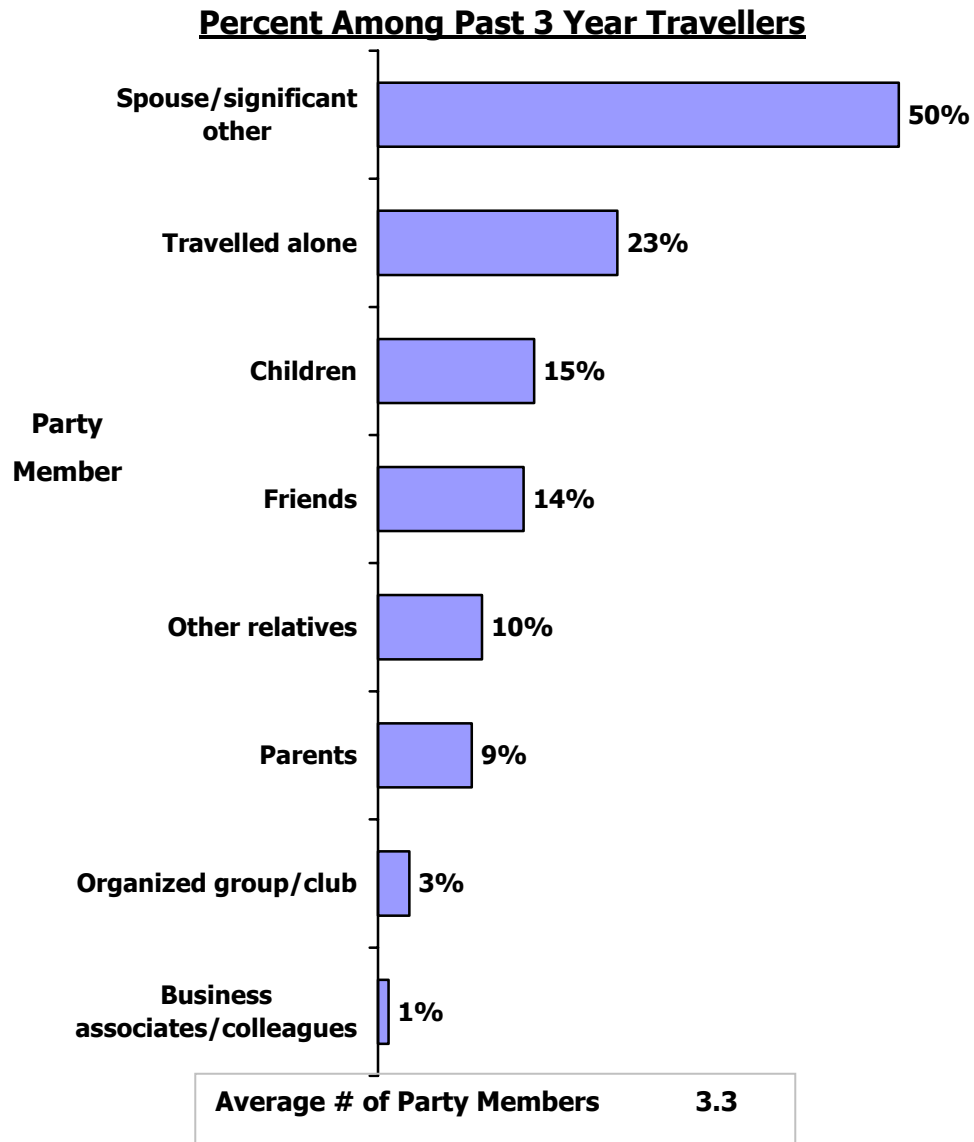
Source: Quantitative Survey Q.11

Q.11 And when did you take that trip to **(DESTINATION IN Q.8a)?** Please tell me the year and month you started that trip?

4.5 Party Size and Composition

Only 15% of long-haul travellers take children along. Most travel as couples (50% or alone 23%).

EXHIBIT SECTION 4-5: PARTY SIZE AND COMPOSITION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.12, 13a¹

¹ Base=n=2,088

Q.12 With whom did you travel on that trip to (DESTINATION IN Q.8a

Q.13a Including yourself, how many people were there in your immediate travel party?

4.6 Party Size and Composition

Canada is very typical in terms of party composition – only 15% with children, as many as 29% travelling alone, 48% with spouse.

The U.S. is a little more likely to be a family destination, among long-haul travellers.

EXHIBIT SECTION 4-6: PARTY SIZE AND COMPOSITION — BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Party Member</u>					
Spouse/significant other	52	51	51	50	48
Travelled alone	21	24	26	22	29
Children	14	15	14	20	15
Friends	16	10	10	15	14
Other relatives	10	9	10	10	6
Parents	9	8	8	7	8
Organized group/club	3	3	1	4	3
Business associates/colleagues	2	1	*	2	1
Average # of party members	3.4	2.9	2.7	3.2	2.8

Source: Quantitative Survey Q. 12, 13a

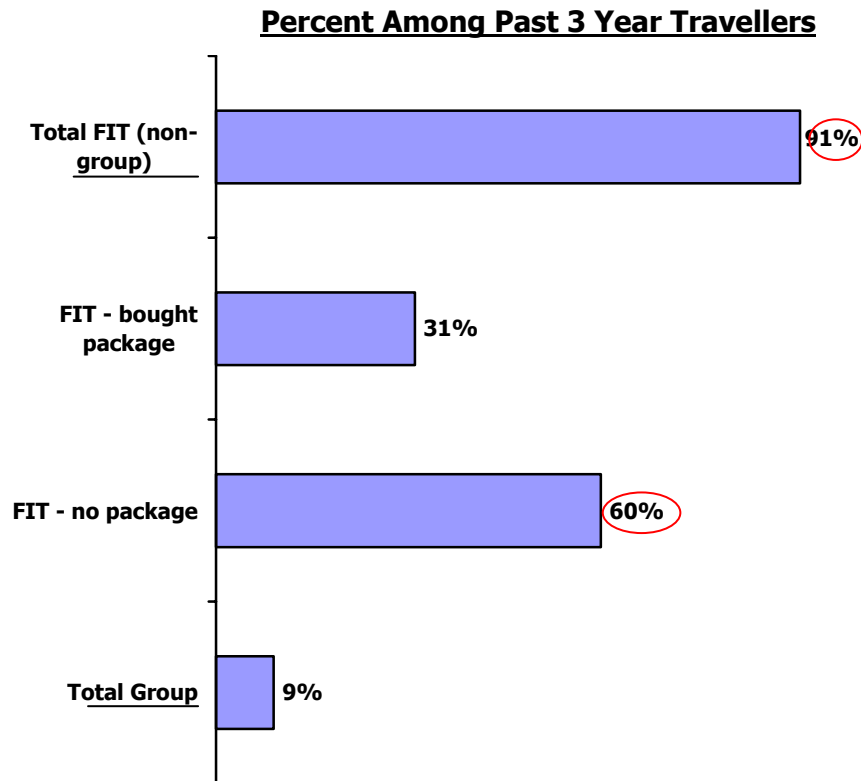
Q.12 With whom did you travel on that trip to (DESTINATION IN Q.8a

Q.13a Including yourself, how many people were there in your immediate travel party?

4.7 Travelled as FIT vs. Group

FIT dominates Australian long-haul behaviour (91%).

EXHIBIT SECTION 4-7: FIT VS. GROUP TRAVEL — BY ALL DESTINATIONS



Source: Quantitative Survey Q.16,17a¹

¹ Base: n=2088

Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?

Q.17a On that trip, did you buy a package that included airfare and accommodation?

4.8 Travelled as FIT vs. Group – By Destination

Canada is very typical – 90% FIT, 65% FIT no package.

EXHIBIT SECTION 4-8: FIT VS. GROUP – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
Travelled as:					
Total FIT (non-group)	93	91	91	93	90
Total FIT - bought package	39	21	21	27	24
Total FIT - no package	53	70	70	66	65
Total Group	8	10	9	7	10

Source: Quantitative Survey Q.16,17a

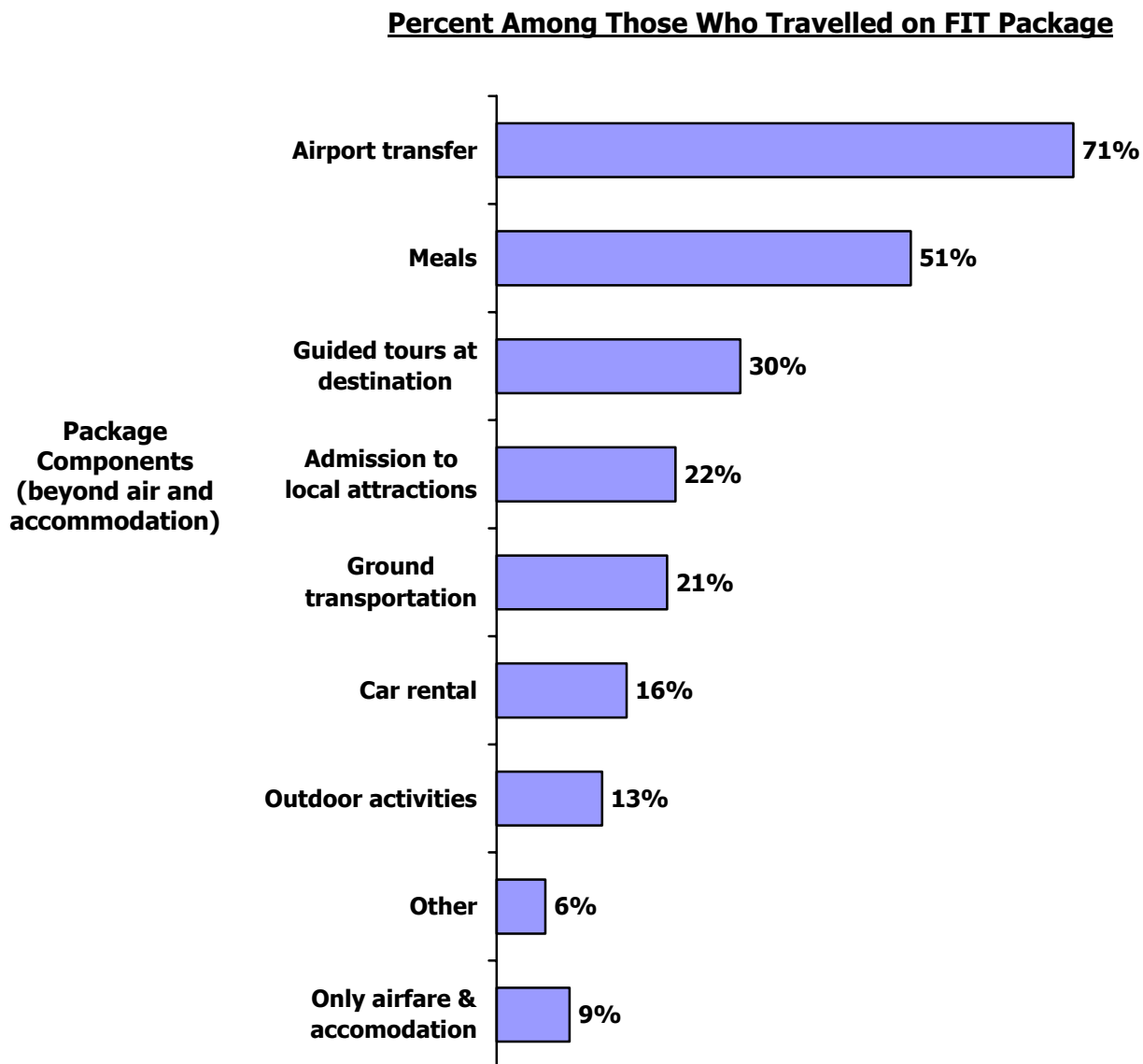
Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?

Q.17a On that trip, did you buy a package that included airfare and accommodation?

4.9 FIT Package Components

The 31% who bought an FIT package last time usually have air, accommodation and airport transfers included. Meals are included half the time, other components less often.

EXHIBIT SECTION 4-9: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.17b¹

¹ Base: n=638

17b What else was included in the package, if any?

4.10 FIT Package Components – By Destination

The 24% who purchased an FIT package on their last trip where Canada was in the itinerary usually only had air, accommodation and airport transfer included.

EXHIBIT SECTION 4-10: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION
— BY DESTINATION

	Percent Among Those Who Travelled On FIT Package				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(435)	(146)	(96)	(81)	(98)
	%	%	%	%	%
<u>Package components (beyond air/accommodation)</u>					
Airport transfers	75	69	67	73	67
Meals	58	39	35	29	33
Guided tours at destination	33	28	27	19	26
Admission to local attraction	19	19	16	37	21
Ground transportation between overnight destinations	22	33	31	15	17
Car rental	11	32	35	30	34
Outdoor Activities	14	12	6	10	22
Other	5	5	5	4	6
Only airfare and accommodation	7	8	8	10	14

Source: Quantitative Survey Q.17b¹

¹ 17b) What else was included in the package, if any?

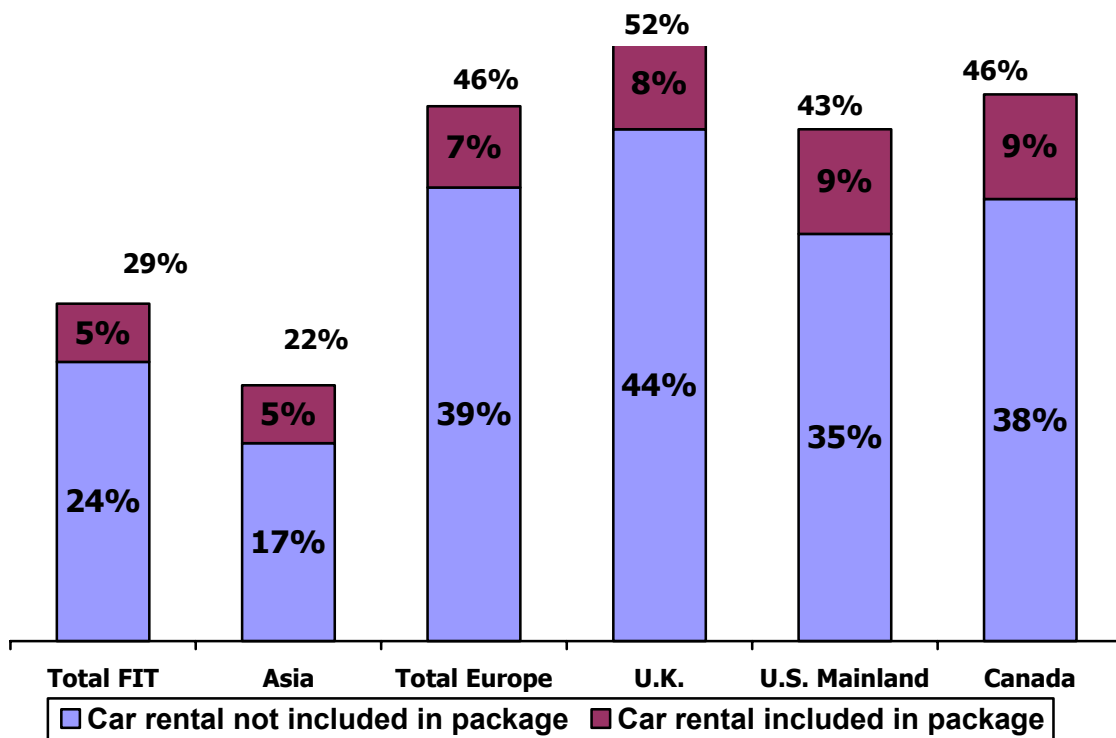
4.11 FIT Car Rental

Renting a car is quite common among FIT travellers journeying beyond Asia – 46% for Canada, a similar level at other destinations.

As the qualitative feedback noted, Australians love to tour by car.

EXHIBIT SECTION 4-1 1: FIT CAR RENTAL

Percent Among FIT Travellers Visiting Each Destination



Source: Quantitative Survey Q.17b,c¹

¹Base: n=1908

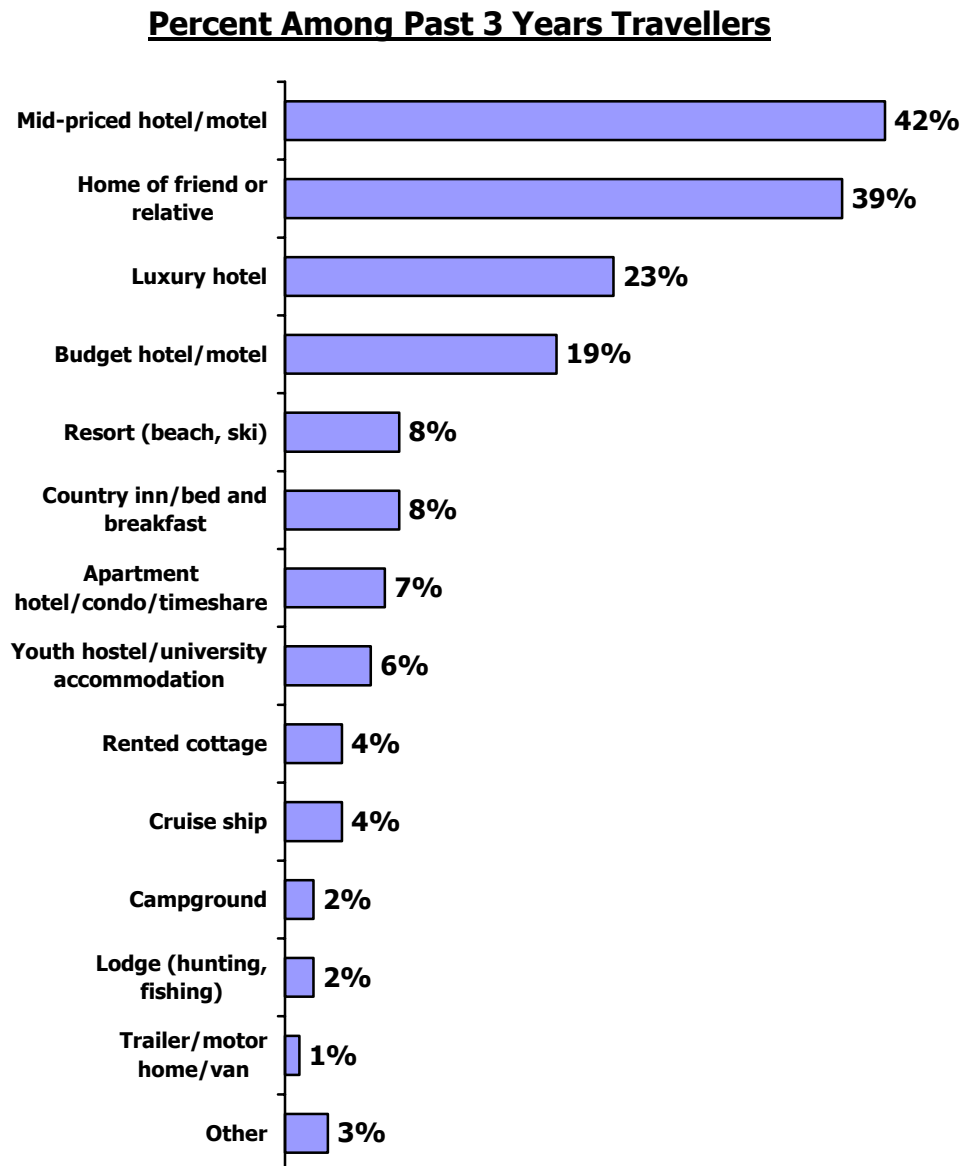
17b) What else was included in the package, if any?

17c) (IF NO AT Q.17A OR IF CAR RENTAL NOT CHECKED IN Q.17B, ASK Q.17C. OTHERS SKIP TO Q.18) Did you rent a car on that trip?

4.12 Accommodation

Australians favour mid-priced accommodations, twice the level of luxury accommodation.

EXHIBIT SECTION 4-12: TYPE OF ACCOMMODATION – BY ALL DESTINATIONS



Source: Quantitative Survey Q.18¹

¹ Base: n=2088

Q.18 In what type of accommodation did you stay? **(Please check all that apply)**

4.13 Accommodation

As many as 2 in 3 visitors to the U.K. stay with friends or relatives, lower for Canada (45%).

Otherwise, mid priced properties dominate all destinations.

EXHIBIT SECTION 4-13: TYPE OF ACCOMMODATION — BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
Accommodation Type					
Mid-priced hotel/motel	43	42	44	54	49
Home of friend or relative	32	58	65	46	45
Luxury hotel	27	18	19	28	24
Budget hotel/motel	18	25	25	22	27
Resort (beach, ski)	11	4	4	9	10
Country inn/bed and breakfast	6	18	21	7	9
Apartment hotel/condo/timeshare	6	8	9	10	11
Youth hostel/university accommodation	5	10	10	6	14
Rented cottage	4	7	7	3	4
Cruise ship	3	4	4	5	8
Campground	1	4	4	2	5
Lodge (hunting, fishing)	1	1	2	2	3
Trailer/motor home/van	1	2	1	4	2
Other	3	5	4	3	4

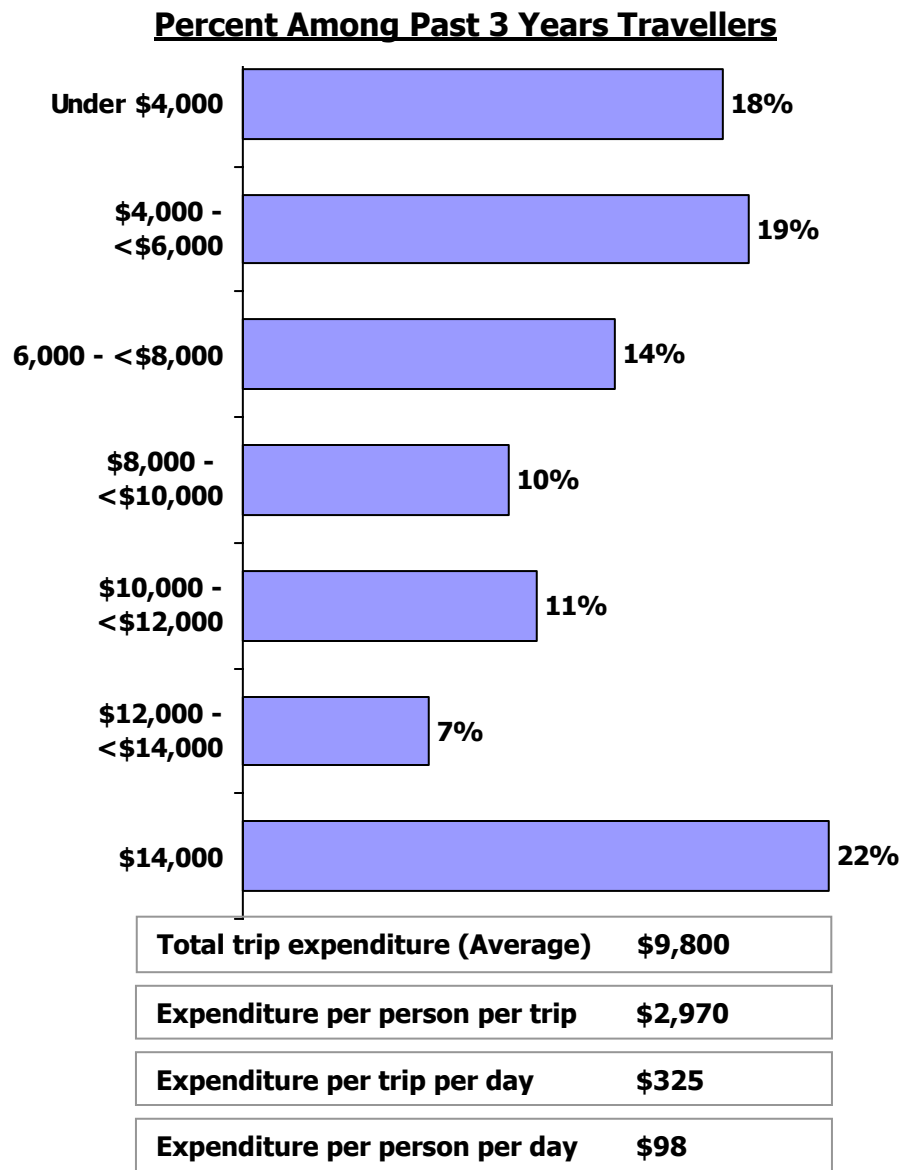
Source: Quantitative survey Q.18

Q.18 In what type of accommodation did you stay?

4.14 Trip Expenditure

The average trip expenditure is close to \$10,000 AUS.

EXHIBIT SECTION 4-1 4: TRIP EXPENDITURE — BY ALL DESTINATIONS



Source: Quantitative Survey Q.19b¹

¹ Base: n=2088

A\$100=CAD \$92.33 (Exchange rate 0.9233 (1.0831) – Feb 28, 2007)

19b What was the total cost of that trip to **(DESTINATION IN Q. 8a** for you and your immediate travel party, including airfare and all other costs? [ACCEPT ONE ANSWER ONLY]

4.15 Trip Expenditure – By Destination

The expenditure per day is actually lower for Canada destined trips than anywhere else (\$244 per day) However, because of a longer length of trip the total cost is higher than others (\$13,300 AUS).

EXHIBIT SECTION 4-15: TRIP EXPENDITURE – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
Expenditure					
Under \$4,000	23	8	7	10	7
\$4,000 - <\$6,000	22	13	13	14	13
\$6,000 - <\$8,000	12	14	14	11	10
\$8,000 - <\$10,000	10	10	11	7	11
\$10,000 - <\$12,000	10	13	15	16	11
\$12,000 - <\$14,000	6	8	8	11	9
\$14,000+	18	34	32	32	41
Total Trip Expenditure (Avg) \$A	9,000	12,300	12,200	12,400	13,300
Expenditure per person per trip \$A	2,647	4,241	4,519	3,875	4,750
Expenditure per trip per day \$A	326	299	265	302	244
Expenditure per person per day \$A	96	103	98	95	87

Source: Quantitative Survey Q.19b

A\$100=CAD\$92.33 (Exchange rate 0.9233 (1.0831) – Feb 28, 2007)

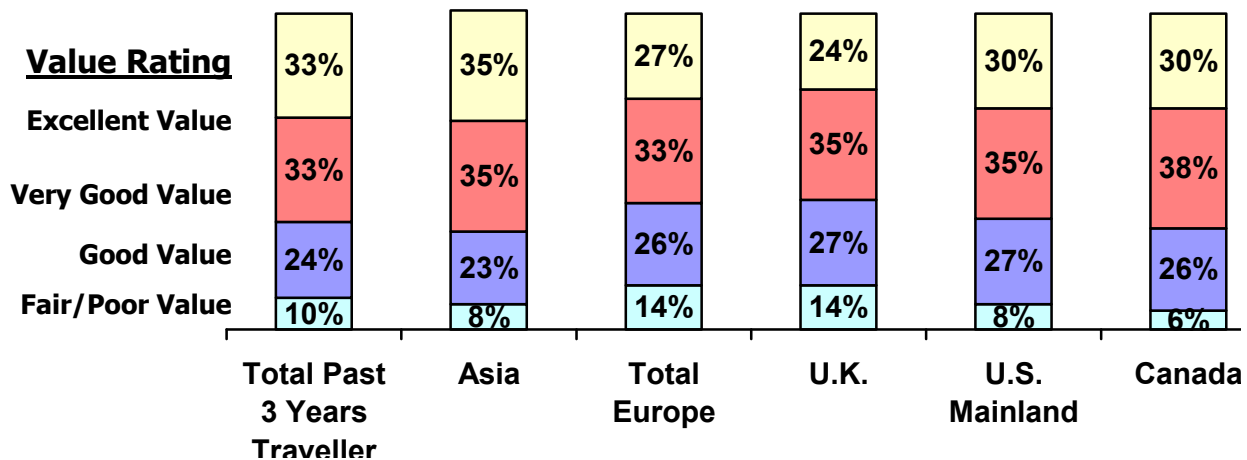
- 19b What was the total cost of that trip to **(DESTINATION IN Q. 8a)** for you and your immediate travel party, including airfare and all other costs? [ACCEPT ONE ANSWER ONLY]

4.16 Value for Money

Canada receives very good scores on value for money – 68% declaring the trip very good or excellent value. This rating is ahead of the U.S. and Europe.

EXHIBIT SECTION 4-16: VALUE FOR MONEY

Percent Among Travellers Visiting Each Destination



Top Two Boxes

Excellent/Very Good	66%	70%	60%	59%	65%	68%
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Source: Quantitative Survey Q19c

Q.19c Overall, how would you rate that trip on value for money?

4.17 Multi-Country Visits

As many as half (48%) of all trips to Canada included the U.S. on the journey. Another significant minority also visited Europe on the trip (29%).

This flags a real opportunity to encourage U.S. destined travellers in particular to include Canada in their itinerary. Only 16% of trips to the U.S. also included Canada – implying a sizable potential.

Only 4% of Europe bound visitors also visited Canada (9% the U.S.) so transiting via Canada (and including a stop over) may be a harder sell.

EXHIBIT SECTION 4-17: TRAVEL IN PAST 3 YEARS BY MOST RECENT DESTINATION

	Most Recent Trip Destination					
	Asia	Total	Europe		U.S. Mainland	Canada
	(1118)	(688)	U.K.	Other Europe	(337)	(243)
	%	%	%	%	%	%
Also Visited						
Asia	100	29	30	32	19	22
Europe	17	100	100	100	23	29
U.K.	11	65	100	49	17	22
Other Europe	12	65	46	100	16	21
U.S. Mainland	4	9	11	11	100	48
Canada	2	4	5	5	16	100

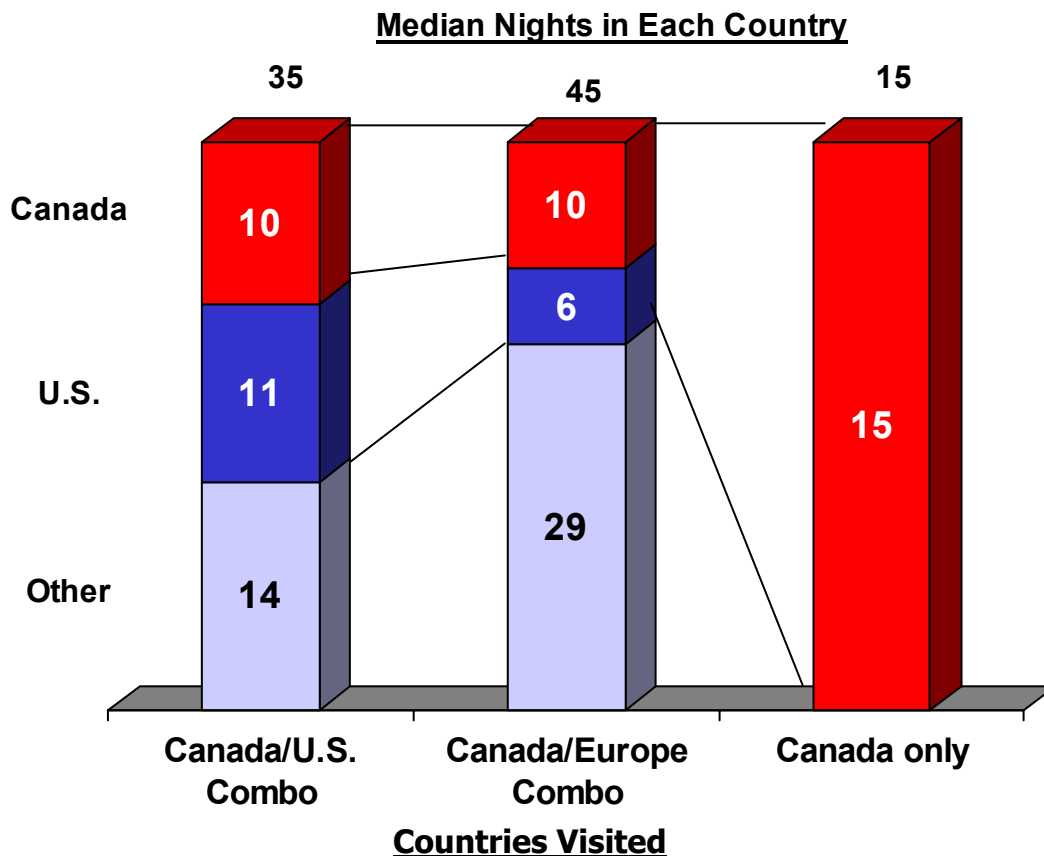
Source: Quantitative Survey Q.8a

Q.8 Thinking about your **most recent** pleasure trip of four nights or longer to somewhere outside of Australia, New Zealand and the South Pacific, which of these places did you visit on that trip?

4.18 Multi-Country Visits - Duration of Stay

Canada is part of a multi-country journey for 3 out of 4 visitors. Only 1 in 4 is exclusively visiting Canada. Those combining a trip to Canada with the U.S. (48%) and with Europe (29%) are each spending a full 10 days in Canada. Consequently, the visit is an integral part of the trip, not simply a stop over.

EXHIBIT SECTION 4-18: DURATION OF STAY



Percent of Canada Visitors **48%**

29%

26%

Source: Quantitative Survey Q.10a,b,c¹

¹ Base n=406

10.a On that trip to **(Q. 8a) DESTINATION**), how many nights, in total, were you away from home?

10.b **(IF CANADA IN Q.8a, ASK)** How many nights, in total, did you spend in Canada?

10.c **IF CANADA IN Q.8a, ASK)** How many nights, in total, did you spend in the U.S. Mainland on that trip, if any?

4.19 Summary

In the majority of cases, a visit to Canada is part of a major excursion to the Northern Hemisphere.

- 48% of Canadian trips included time in the U.S.
- 29% included time in Europe
- Only 26% were Canada only trips
- Median trip duration – 29 nights
- Median stays in Canada among U.S./Europe visitors – 10 nights

Canada, then, must be positioned in the context of a much broader journey – a must see destination, essential to include on a northern trip.

Even encouraging extra nights in Canada (currently 10 for those also visiting the U.S. or Europe) could have significant impact on revenue for Canada.

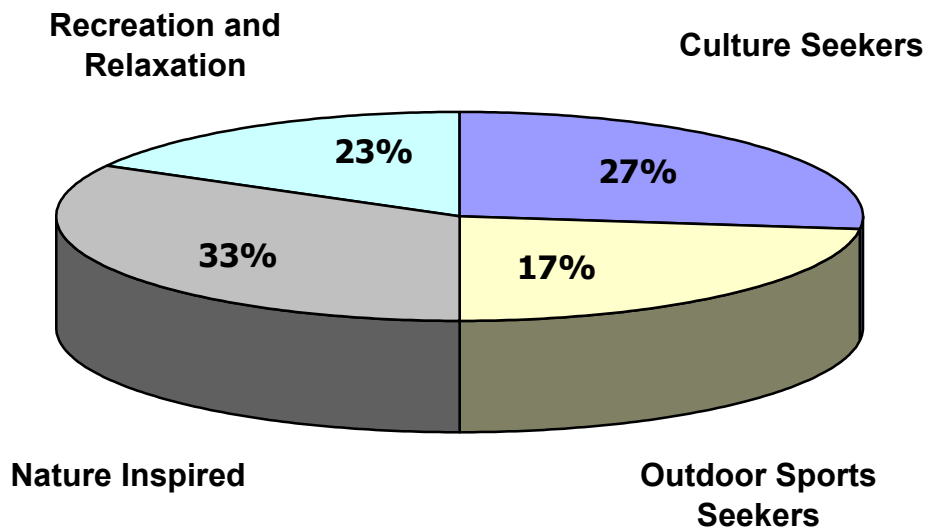
Section 5: Market Segmentation

5.1 Segmentation Analysis

Assisted by grassroots learning from the preliminary focus groups, a multi-dimensional rating question was created for the quantitative survey.

Four segments emerged. Each is discussed in detail in the next section.

EXHIBIT SECTION 5-1: SIZE OF MARKET SEGMENT



Source: Quantitative Survey Q.20¹

¹ Base= Past/Future Travellers (n=2,772)

Q.20. Please imagine that you are taking an overseas pleasure trip outside of Australia, New Zealand and the South Pacific for 4 nights or longer. For each statement on this page check one box to show how important that reason is to you when considering such a trip.

5.2 Segment Characteristics

Nature Inspired (33%)

This segment represents 33% of the travel market. Key benefits sought in travel are to be surrounded by beautiful nature and feel inspired by it. The demographics skew older and female.

Culture Seekers (27%)

This group has a strong cultural focus – opportunity to experience unique places, to increase knowledge, seeing first hand what they learned in school. This segment spans all ages.

Recreation and Relaxation (23%)

These tend to be family travellers seeking a relaxing, friendly, safe and healthy environment.

Outdoor Sports Seekers (17%)

Under 30, males dominate this segment. They want to enjoy outdoor sports, be daring and adventurous. They represent 17% of the Australian travel market.

5.2 Segment Characteristics

EXHIBIT SECTION 5-2: SEGMENT CHARACTERISTICS

	Culture Seekers	Outdoor Sports Seekers	Nature Inspired	Recreation and Relaxation
Segment Attitudinal Drivers	<ul style="list-style-type: none"> - Opportunity to experience unique places - Opportunity to increase my knowledge - Opportunity to visit a place I have not been to - Opportunity to try new foods - Experiencing a different country's lifestyle - Seeing places important in history - Coming home with exciting travel stories - Seeing first hand what I learned in school 	<ul style="list-style-type: none"> - Participating in active outdoor sports - Extreme sports - Enjoying alpine skiing or snowboarding - Roughing it - Being daring and adventuresome 	<ul style="list-style-type: none"> - Surrounded by beautiful, unspoiled nature - Experiencing unspoiled nature - Seeing wildlife in nature - Being inspired by beauty and nature - Feeling a wide, spacious outdoor environment 	<ul style="list-style-type: none"> - Enjoying a relaxing atmosphere - Feeling secure and safe - Being in a clean, healthy environment - Being together as a family - Feeling a sense of freedom - Getting away from the demands of home - Local people are friendly and welcoming - Getting away from the summer heat

5.2 Segment Characteristics

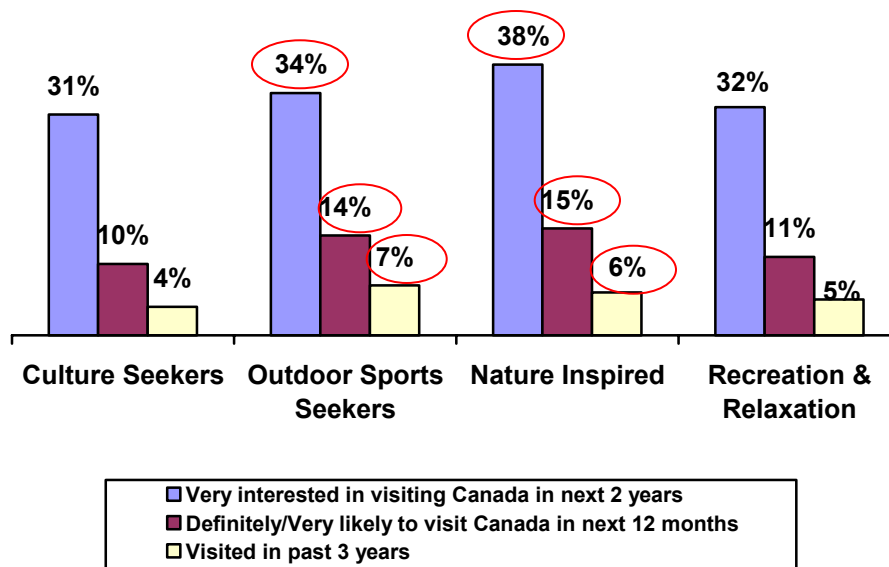
	Culture Seekers	Outdoor Sports Seekers	Nature Inspired	Recreation and Relaxation
Profile Skews				
Gender				
Male	48	59	42	49
Female	52	41	58	51
Marital Status	Married with no young children at home	Mixed of married/living together and singles	Married with no young children at home	Married with children
Age				
18 to 29	24	55	15	23
30 to 39	21	24	15	22
40 to 49	20	13	18	24
50+	35	8	51	32
Household Income (Aus)				
Under \$35,000	16	18	19	18
\$35,000 - <\$50,000	14	15	16	13
\$50,000 - <\$75,000	20	20	21	18
\$75,000 - <\$100,000	15	18	14	16
\$100,000+	22	20	16	21
Recent Trip Expenditure (Aus)				
Under \$4,000	16	20	15	23
\$4,000 - <\$6,000	16	21	18	21
\$6,000 - <\$8,000	14	14	13	13
\$8,000 - <\$12,000	23	21	20	19
\$12,000 - <\$16,000	14	10	14	13
\$16,000 - <\$20,000	4	7	7	5
\$20,000+	13	7	13	7
Average	\$10,400	\$9,000	\$10,800	\$8,600

5.3 Current Plans to Visit Canada

Nature Inspired and Outdoor Sports Seekers are key target markets, based on its interest in Canada.

Although Recreation and Relaxation are also very interested, this is primarily the family travel market which tend to seek closer, less expensive destinations.

EXHIBIT SECTION 5-3: CURRENT PLANS TO VISIT CANADA — BY SEGMENT



Source: Quantitative Survey Q.7, 22, 23¹

¹ Base=Past/Future Travellers (n=2,772)

Q.7 During the past 3 years which of these countries or destinations outside of Australia did you visit for pleasure and stayed for 4 nights or longer, if any?

Q.22 How interested are you in visiting South East Asia, Europe, US and Canada in the **next two years?**

Q.23 How likely are you to visit South East Asia, Europe, US and Canada in the **next twelve months?**

5.4 Ideal Trip to Canada by Segment

The activities of interest on a future trip to Canada for each target segment are numerous and varied. Australians clearly want to see and do as much as possible.

Outdoor Sports Seekers show high interest in:

Canoeing/kayaking	(72%)
Snow skiing/snowboarding	(74%)
Camping	(57%)
Horseback riding	(58%)
Attending a sporting event	(56%)
Eco-travel	(49%)

Nature inspired want:

- To see and feel Canada's natural environment,
- but are also intrigued by Canadian culture.

All segments ideally would spend 2 to 3 weeks in Canada, travelling FIT, staying in mountain or lakeside resorts, more mid-priced than luxurious accommodation.

Scenic rail travel is highly popular as is renting a car.

5.5 Ideal Trip to Canada

EXHIBIT SECTION 5-4: IDEAL TRIP TO CANADA — BY SEGMENT

Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Culture Seekers	Outdoor Sports Seekers	Nature Inspired	Recreation & Relaxation
	(461) %	(315) %	(699) %	(408) %
<u>Ideal Next Trip</u>				
<u>Season</u>				
January - March	14	22	12	11
April - June	28	26	28	29
July - September	42	30	44	44
October - December	16	22	16	17
<u>Duration</u>				
# of nights (avg)	16.9	19.7	18.6	15.0
<u>Region</u>				
Right across Canada	74	68	71	72
Western Canada only	14	16	18	13
Eastern Canada only	6	8	6	8
Other	6	8	5	7
<u>Would also visit overnight or longer</u>				
U.S.	65	63	58	62
Europe	35	42	34	25
Other countries	27	31	23	22
Canada only	17	14	20	20
<u>Type of Tour</u>				
Group Tour	20	19	22	15
Prefer: All days organized	7	10	8	7
Many free days	13	10	14	8
FIT (non-group)	80	81	78	85
Prefer: Package	37	28	35	43
Non-package	44	53	43	42

Source: Quantitative Survey Q.24

Q.24 Thinking about your next trip to Canada, if you were to go, describe your ideal trip

5.6 Ideal Trip to Canada

Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Culture Seekers	Outdoor Sports Seekers	Nature Inspired	Recreation & Relaxation
	(461) %	(315) %	(699) %	(408) %
<u>Transportation Between Centers</u>				
Air	83	80	81	81
Rail	83	77	88	78
Rental car	70	76	67	73
Motor coach	42	41	46	33
Private car	31	36	29	36
Motor home/camper	27	33	29	24
<u>Accommodation</u>				
Mountain resort	33	46	41	38
Seaside resort	13	17	13	15
Lakeside resort	21	29	32	27
Ski resort	13	27	6	12
Farm	3	6	4	2
Horse ranch	1	6	5	3
Cruise ships	18	10	23	14
Canadian spa	5	6	5	7
Log cabin/lodge	21	20	24	16
Campground	1	7	2	1
Trailer/motor home/van	7	4	7	4
Rented cottage	5	4	6	4
Country inn/bed and breakfast	14	7	16	12
Apartment hotel/condo/timeshare	10	6	8	10
Youth hostel/university accommodation	6	8	2	1
Luxury hotel	17	14	13	18
Mid-priced hotel/motel	32	15	28	32
Budget hotel	13	10	10	10
Home of friends or relatives	12	11	11	14

5.6 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years			
	Culture Seekers	Outdoor Sports Seekers	Nature Inspired	Recreation & Relaxation
	(461) %	(315) %	(699) %	(408) %
Activities				
See/experience the Rockies/mountains	89	86	95	89
Visit historical sites	93	79	97	81
Feeling the purity and freshness of untouched nature	81	84	97	84
Experiencing French Canadian culture/cuisine	88	81	92	83
Wild animals in their environment	78	86	95	80
See polar bears	78	80	83	79
Visiting museums/art galleries	78	64	86	69
Culinary experiences (fine dining, winery tours)	74	66	77	67
Viewing aurora	65	69	76	61
Alaska cruise	66	65	75	64
Participate in an activity related to my hobbies	58	73	65	59
Viewing autumn leaves	53	54	65	48
Going to live theatre	57	47	59	49
Hiking/trekking	43	78	54	45
Visiting the home of a local family	54	45	57	51
Visiting a spa	45	59	51	54
Go canoeing or kayaking	41	72	42	41
Aboriginal cultural experiences, celebrations, and attractions	34	47	54	29
Visit a garden exhibition or flower show	38	32	53	36
Attending a sporting event	44	56	34	40
Horseback riding	33	58	40	41
Salmon fishing	37	44	40	36
Snow skiing/snowboarding	37	74	25	33
Eco-travel	20	49	43	22
Family/children's activities	32	37	27	37
Going camping	21	57	29	20
Staying on a farm (agri-tourism)	19	33	30	21
Golfing	19	29	15	22

5.6 Summary

The Australian travel market segments into four groups

1. Nature Inspired (33%)
2. Outdoor Seekers (17%)
3. Recreation and Relaxation (23%)
4. Culture Seekers (27%)

The Canadian product best fits with segments 1 and 2, but available activities are also relevant for the other 2 segments who may be drawn more to Europe or the U.S. but for whom a Canadian stop can be a marketable addition to their northern journey.

Examples of themes for packages and FIT include:

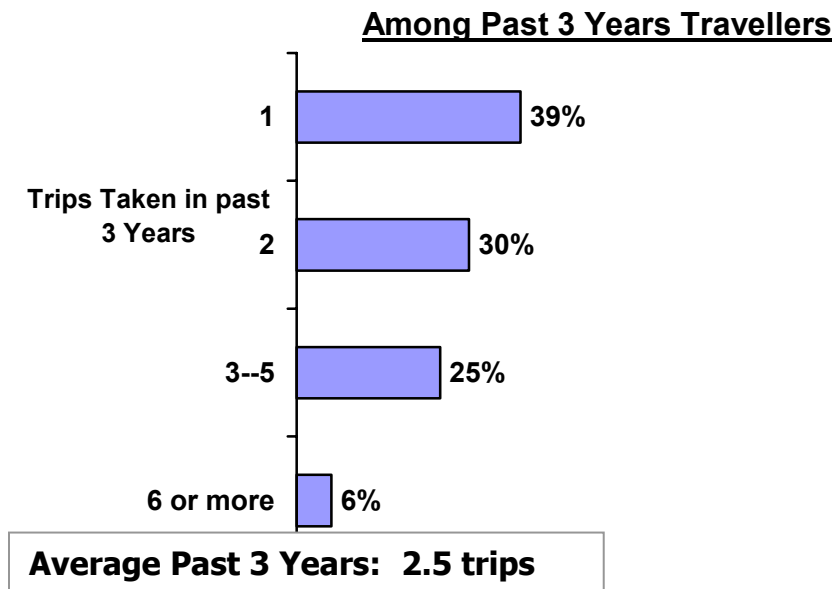
Theme	Accommodation	Travel	Segments
Mountain and meadow experiences			
<ul style="list-style-type: none"> Mountain Nature Recreation and or sports Hiking/trekking/kayaking Spa Summer & winter (snow sports) 	<ul style="list-style-type: none"> Resort Log cabin/lodge 	<ul style="list-style-type: none"> Rail Rental car 	<ul style="list-style-type: none"> Nature Inspired Recreation/Relaxation Outdoor sports
Rejuvenate and Lift the Soul			
<ul style="list-style-type: none"> Mountains Meadows Lakes/oceans Wildlife Hiking/trekking/kayaking Spa 	<ul style="list-style-type: none"> Resort Log cabin/lodge 	<ul style="list-style-type: none"> Rail Rental car 	<ul style="list-style-type: none"> Nature Inspired Recreational/Relaxation
Ski Canada			
<ul style="list-style-type: none"> Big open space, no crowds Canadian food, wine, culture Great snow/ powder Family/children activities 	<ul style="list-style-type: none"> Resort 	<ul style="list-style-type: none"> Rental car 	<ul style="list-style-type: none"> Recreation/Relaxation Outdoor Sports
Canadiana			
<ul style="list-style-type: none"> Regionally or across the country Heritage sites, museum/galleries, theatre French culture, wine tours, dining 	<ul style="list-style-type: none"> Resorts Hotels 	<ul style="list-style-type: none"> Rail Rental car Air 	<ul style="list-style-type: none"> Culture Seekers

Section 6: Travellers Profile

6.1 Trip Frequency

The Australian long-haul traveller takes one long-haul journey per year on average (an average of 2.5 trips in the past 3 years among those who have travelled beyond Oceania).

EXHIBIT SECTION 6-1 : NUMBER OF LONG-HAUL TRIPS TAKEN IN PAST 3 YEARS



Source: Quantitative Survey Q4¹

¹ Base= past 3 year travellers (n=2,088)

Q.4 In the past three years, that is since February, 2004, how many times have you, yourself, taken a **pleasure trip outside of Australia, New Zealand and the South Pacific for 4 nights or longer**? Again, please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

6.2 Australian Long-haul Travel Market Profile

Those who visited Canada are often young (31% age 18 to 29). Only 28% are 50+.

Friends and relatives, who are often very important drivers of the destination decision process would play a significant role in motivating future travel (54% have them in Canada).

The socio-economic profile is quite consistent with other destinations.

EXHIBIT SECTION 6-2: AUSTRALIAN LONG-HAUL MARKET PROFILE

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Age</u>					
18 - 29	31	22	18	24	31
30 - 39	20	21	20	23	25
40 - 49	18	14	12	21	16
50 - 59	17	20	23	18	15
60+	15	23	26	14	13
<u>Gender</u>					
Male	52	43	40	46	47
Female	48	57	60	54	53
<u>City</u>					
Sydney/New South Wales	36	39	36	38	37
Melbourne/Victoria	27	25	25	27	28
Brisbane/Queensland	14	16	16	16	14
Perth/Western Australia	13	10	12	9	10
Adelaide/South Australia	6	6	7	5	6
Hobart/Tasmania	2	2	2	2	1
Canberra	1	2	3	3	3
<u>Close friends/relatives in Canada</u>					
Yes	n/a	n/a	n/a	n/a	54
No	n/a	n/a	n/a	n/a	45

6.2 Australian Long-haul Travel Market Profile

	<u>Percent Among Travellers Visiting Each</u>				
	<u>Asia</u>	<u>Europe</u>	<u>U.K.</u>	<u>U.S. Mainland</u>	<u>Canada</u>
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Marital Status</u>					
Married/living together/de-facto	62	64	64	63	64
Single	26	23	22	26	26
Divorced/widowed/separated	10	12	13	11	9
<u>Household Composition</u>					
Adults only	67	75	77	66	68
With children <18	33	25	23	34	32
<u>Occupation</u>					
<u>Total Employed</u>	<u>64</u>	<u>59</u>	<u>58</u>	<u>69</u>	<u>69</u>
White collar worker	13	12	10	14	17
Blue collar worker	3	2	3	4	4
Manager	8	7	7	8	9
Professional	20	21	21	22	20
Self employed	8	8	7	11	8
Skilled workers	4	3	3	3	3
Semi/unskilled worker	2	1	1	1	2
Part-timer	6	6	5	6	6
Student	12	8	7	6	7
Housewife	5	7	7	5	4
Retired	13	19	22	13	14
Other	5	5	6	6	3

6.2 Australian Long-haul Travel Market Profile

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Education</u>					
Some secondary/technical school	9	8	7	4	9
Intermediate/form 4/year 10 to 5th form/leaving/year11	10	12	13	13	11
Finished tech./matric/HSC/year 12	15	18	16	19	13
Some/now at university	14	12	12	14	12
Have diploma or degree	50	48	49	48	53
<u>Household Income (Aus)</u>					
Under \$35,000	17	15	14	15	12
\$35,000 - <\$50,000	14	12	14	13	13
\$50,000 - <\$75,000	19	19	20	16	17
\$75,000 - <\$100,000	16	17	17	15	17
\$100,000+	21	22	22	26	28

Source: Quantitative Survey Q.1,2,3a,26-32 (basic data)

CAD Equivalent (Bank of Canada exchange rate, February 28, 2007)

<\$35,000=<\$32,316 CAD

\$35,000 - \$50,000=\$32,316 - \$46,165 CAD

\$50,000 - \$75,000=\$46,165 - \$69,248 CAD

\$75,000 - \$100,000=\$69,248 - \$92,330 CAD

\$100,000+ =\$92,330+ CAD

6.3 Summary

Australian travellers to Canada skew quite young:

- 18 to 29 (31%)
- 30 to 39 (25%)
- 40 to 49 (16%)
- 50+ (28%)

As many as 54% have friends or relatives in Canada which confirms that VFR is an important destination draw beyond vacation attributes.

Section 7: The Canadian Opportunity

7.1 Aspirational Destinations

Canada ranks only 10th as a near term future destination priority – well behind the U.K. (1st) and the U.S. (2nd). Clearly, Canada is far from top of mind in spite of its inherent appeals.

EXHIBIT SECTION 7-1: LONG-HAUL DESTINATION PRIORITY

Rank	
1	United Kingdom
2	U.S. Mainland
3	Thailand
4	Hawaii
5	Singapore
6	Italy
7	China
8	Hong Kong
9	France
10	Canada

Source: Quantitative Survey Q6¹

¹ Base=Past/Future Travellers (n=2,772)

6a Thinking of future travel outside of **Australia, New Zealand and the South Pacific**, what countries would you be likely to visit on a pleasure trip for 4 nights or longer in the next two years? Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

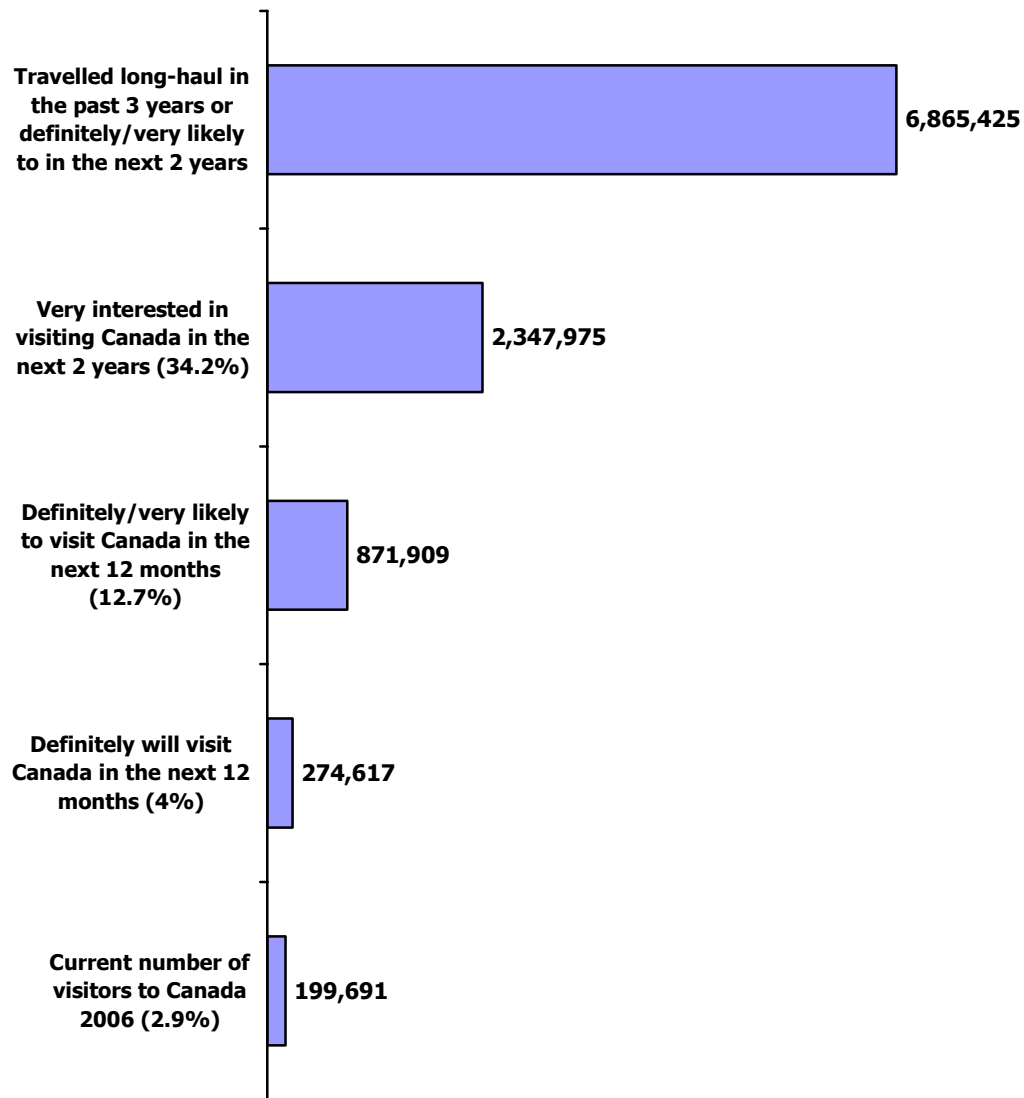
(PLEASE SELECT YOUR MOST LIKELY CHOICES WITH UP TO 5 COUNTRIES FROM THE LIST BELOW OR WRITE IN YOUR CHOICES IF NOT LISTED) (PN: List from 7 with codes 18-26 suppressed)

6b From the countries you selected please rank those countries starting with the one you would likely to visit first, then second, third and so on.
(PROGRAMMING: SHOW Up to 5 DESTINATIONS SELECTED IN 6a)(If only one selected in Q6a skip to Q7)

7.2 Interest in Visiting Canada

The latent demand for Canada (those very interested in visiting) is significantly greater than the current visitor flow.

EXHIBIT SECTION 7-2: LATENT DEMAND FOR CANADA



Source: Quantitative Survey Q.22, 23

- Q.22 How interested are you in visiting South East Asia, Europe, US and Canada in the **next two** years? (Please select one only)
- Q.23 How likely are you to visit (SHOW COUNTRIES WITH CODES 4 OR 3 IN Q.22) in the **next twelve months**? (Please select one only)

7.3 Priority Analysis - by Segment

Although Canada ranks 10th overall, it is near the top of the list for certain segments:

EXHIBIT SECTION 7-3: TOP 3 SEGMENTS AND THEIR MARKET SIZE

<u>Segment</u>	<u>Canada's Priority Ranking</u>	<u>Size of Market</u> #
Repeat travellers (travelled already in the past 3 years)	1 st	357,000
Age 60+	2 nd	1,620,000
Friends and relatives in Canada	3 rd	1,510,000

The age 60+ age segment only represents 13% of Canada's current visitors, so it is clearly a key target. There are 1.6 million age 60+ long-haul travellers* in Australia.

As many as 22% of long-haul travellers have friends or relatives living in Canada, so they too are a key target segment (1.5 million travellers base).

Recent travellers are a third prime segment because of their strong intentions to return in the near future (357,000 base).

*CTC definition – past 3 year/next 2 year long-haul traveller

7.3 Priority Analysis – by Segment

EXHIBIT SECTION 7-4: CANADA'S PRIORITY RANKING KEY SEGMENT

	Canada's Priority Ranking
	#
Total	10th
<u>Gender</u>	
Male	9th
Female	8th
<u>Age</u>	
18 - 29	10th
30 - 39	8th
40 - 49	6th
50 - 59	9th
60+	2nd
<u>Travelled to Canada in Past 3 Years</u>	1st
<u>Friends and Relatives in Canada</u>	
Yes	3rd
No	10th

Source: Quantitative Survey Q.6b

*Note: due to the complexity of the ranking calculation (countries mentioned and ranking of each based on average scores) it is possible that rankings among sub-samples can all be slightly higher or lower than the overall rank due to numerical rounding.

Q. 6b From the countries you selected please rank those countries starting with the one you would likely to visit first, then second, third and so on.

7.4 Ideal Trip to Canada

For those seriously considering Canada as a future destination, their ideal trip would look like this:

Season:	Likely April to September
Duration in Canada:	2 ½ weeks
Type of trip:	FIT
Also visit:	The U.S. (66%), possibly Europe (36%), few Canada only (16%)
Intercity:	Air, rail, car rental all popular
Accommodation:	Canadian resorts (mountain or lakeside), authentic lodge, more mid-priced than luxury.
Activities:	Seeing Canada's natural scenery and wildlife, cultural experience, hiking/trekking and other soft adventure also popular.

7.4 Ideal Trip to Canada

EXHIBIT SECTION 7-5: IDEAL TRIP TO CANADA — BY SEGMENT

	Percent Among Prospective Market*
	(997)
	%
<u>Ideal Next Trip</u>	
<u>Season</u>	
January - March	13
April - June	29
July - September	40
October - December	17
<u>Duration</u>	
# of nights (avg)	19.1
<u>Region</u>	
Right across Canada	71
Western Canada only	17
Eastern Canada only	6
Other	6
<u>Would also visit overnight or longer</u>	
U.S.	66
Europe	36
Other countries	28
Canada only	16
<u>Type of Tour</u>	
<u>Group Tour</u>	21
Prefer: All days organized	8
Many free days	12
<u>FIT (non-group)</u>	79
Prefer: Package	36
Non-package	43

7.4 Ideal Trip to Canada

	Percent Among Prospective Market*
	(997)
	%
<u>Transportation Between Centers</u>	
Air	80
Rail	82
Rental car	70
Motor coach	44
Private car	35
Motor home/camper	30
<u>Accommodation</u>	
Mountain resort	40
Seaside resort	12
Lakeside resort	28
Ski resort	13
Farm	4
Horse ranch	5
Cruise ships	17
Canadian spa	7
Log cabin/lodge	22
Camp ground	2
Trailer/motor home/van	6
Rented cottage	4
Country inn/bed and breakfast	13
Apartment hotel/condo/timeshare	9
Youth hostel/university accommodation	3
Luxury hotel	16
Mid-priced hotel/motel	24
Budget hotel	10
Home of friends or relatives	14

7.4 Ideal Trip to Canada

	Percent Among Prospective Market*
	(997)
	%
<u>Activities</u>	
See/experience the Rockies/mountains	91
Visiting historical sites	88
Feeling the purity and freshness of untouched nature	88
Experiencing French Canadian culture/cuisine	87
Wild animals in their environment	86
See polar bears	80
Visiting museums, art galleries	76
Culinary experiences (fine dining, winery tours)	75
Viewing aurora	71
Alaska cruise	71
Participate in an activity related to my hobbies	64
Viewing autumn leaves	58
Going to live theatre	57
Visiting the home of a local family	56
Hiking/trekking	54
Visiting a spa	53
Go canoeing or kayaking	46
Visit a garden exhibition or flower show	46
Aboriginal cultural experiences, celebrations, and attractions	44
Attending a sporting event	44
Salmon fishing	43
Horseback riding	42
Snow skiing/snowboarding	38
Eco-travel	36
Family/children's activities	35
Going camping	32
Staying on a farm (agri-tourism)	28
Golfing	20

Source: Quantitative Survey Q.24

Q.24 Thinking about your next trip to Canada, if you were to go, describe your ideal trip below:

*Very interested in visiting Canada in next 2 years.

7.5 Ideal Trip to Canada – by Age

The ideal trip for younger travellers (under 40) is significantly different from older travellers (40+).

Although there are many commonalities, their needs skew as follows:

	<u>Younger (under 40)</u>	<u>Older (40+)</u>
Season	<ul style="list-style-type: none"> • Open to 1st and 4th quarter travel 	<ul style="list-style-type: none"> • 3rd quarter dominates
FIT	<ul style="list-style-type: none"> • FIT strongly preferred 	<ul style="list-style-type: none"> • Older open to group (31% of 60+)
Intercity	<ul style="list-style-type: none"> • High interest in rental car 	<ul style="list-style-type: none"> • Rail has strong appeal
Accommodation	<ul style="list-style-type: none"> • Ski resort popular (to 29% of 18 to 29) 	<ul style="list-style-type: none"> • Cruise ships and lakeside resorts (especially to 60+)
Activities	<ul style="list-style-type: none"> • Skiing, camping, canoeing/kayaking very popular • Spa visits (66% for 18 to 29) 	<ul style="list-style-type: none"> • Less physical activity • More of a blend of nature, sightseeing and Canadian culture

7.5 Ideal Trip to Canada – by Age

EXHIBIT SECTION 7-6: IDEAL TRIP TO CANADA – BY AGE

	Percent Among Prospective Market* - Age				
	18 to 29	30 to 39	40 to 49	50 to 59	60+
	(468)	(384)	(376)	(375)	(333)
	%	%	%	%	%
<u>Ideal Next Trip</u>					
<u>Season</u>					
January - March	21	18	13	10	6
April - June	25	29	27	31	30
July - September	28	37	44	45	54
October - December	26	17	16	13	10
<u>Duration</u>					
# of nights (avg)	19.8	16.8	15.4	18.3	18.5
<u>Region</u>					
Right across Canada	72	72	73	71	67
Western Canada only	12	12	17	17	22
Eastern Canada only	7	9	5	5	7
Other	9	7	5	7	4
<u>Would also visit overnight or longer</u>					
U.S.	59	68	64	62	56
Europe	42	31	30	27	37
Other countries	31	23	29	20	24
Canada only	16	17	13	22	24
<u>Type of Tour</u>					
Group Tour	18	12	14	22	31
Prefer: All days organized	7	3	5	8	17
Many free days	11	9	9	14	14
FIT (non-group)	82	88	86	78	69
Prefer: Package	36	38	41	35	31
Non-package	46	50	45	44	38

*Very interested in visiting Canada in next 2 years.

7.5 Ideal Trip to Canada – by Age

	Percent Among Prospective Market* - Age				
	18 to 29	30 to 39	40 to 49	50 to 59	60+
	(468) %	(384) %	(376) %	(375) %	(333) %
<u>Transportation Between Centers</u>					
Air	84	83	82	80	76
Rail	75	77	85	86	91
Rental car	75	77	77	67	54
Motor coach	36	32	40	45	55
Private car	38	30	35	31	28
Motor home/camper	23	31	32	32	23
<u>Accommodation</u>					
Mountain resort	41	42	39	37	38
Seaside resort	16	15	18	11	9
Lakeside resort	24	26	26	28	37
Ski resort	29	15	8	4	2
Farm	5	3	2	3	4
Horse ranch	7	2	3	2	3
Cruise ships	9	10	17	23	30
Canadian spa	8	7	6	4	4
Log cabin/lodge	19	21	23	22	18
Camp ground	4	3	2	2	1
Trailer/motor home/van	1	6	7	10	7
Rented cottage	6	7	4	5	3
Country inn/bed and breakfast	7	13	14	16	18
Apartment hotel/condo/timeshare	7	8	11	10	8
Youth hostel/university accommodation	7	4	3	2	3
Luxury hotel	16	17	17	13	11
Mid-priced hotel/motel	20	27	27	32	34
Budget hotel	10	12	9	9	12

*Very interested in visiting Canada in next 2 years.

7.5 Ideal Trip to Canada – by Age

	Percent Among Prospective Market* - Age				
	18 to 29	30 to 39	40 to 49	50 to 59	60+
	(468) %	(384) %	(376) %	(375) %	(333) %
Activities					
See/experience the Rockies/mountains	85	87	93	94	93
Visiting historical sites	79	86	95	93	95
Feeling the purity and freshness of untouched nature	79	88	90	89	95
Experiencing French Canadian culture/cuisine	82	86	91	90	87
Wild animals in their environment	81	85	86	88	88
See polar bears	81	80	84	80	75
Visiting museums, art galleries	66	72	83	84	83
Culinary experiences (fine dining, winery tours)	64	69	79	77	74
Viewing aurora	62	68	71	73	74
Alaska cruise	65	68	70	69	72
Participate in an activity related to my hobbies	69	68	65	58	56
Viewing autumn leaves	53	55	53	56	68
Going to live theatre	53	45	48	61	67
Visiting the home of a local family	45	40	54	59	73
Hiking/trekking	69	63	54	46	30
Visiting a spa	66	52	54	45	37
Go canoeing or kayaking	63	54	49	36	26
Visit a garden exhibition or flower show	30	35	40	48	64
Aboriginal cultural experiences, celebrations, and attractions	40	36	43	51	47
Attending a sporting event	51	49	43	33	30
Salmon fishing	37	45	45	38	31
Horseback riding	55	51	45	30	21
Snow skiing/snowboarding	71	53	36	16	5
Eco-travel	37	37	36	31	28
Family/children's activities	38	46	46	20	10
Going camping	44	36	29	23	14
Staying on a farm (agri-tourism)	29	25	27	23	26
Golfing	24	18	21	20	18

*Very interested in visiting Canada in next 2 years.

Source: Quantitative Survey Q.24

7.6 Skiing/Snowboarding As a Niche Market

The ski/snowboard niche tends to be young and quite interested in future travel to Canada.

EXHIBIT SECTION 7-7: PROFILE OF TRAVELLER WHO SKIED/SNOWBOARDED ON MOST RECENT TRIP

	Percent Among Those Who Skied/Snowboarded on Most Recent Trip
	(96) %
<u>Age</u>	
18-29	54
30-39	17
40-49	18
50+	12
<u>Gender</u>	
Male	59
Female	41
<u>Segment</u>	
Culture Seekers	20
Outdoor Sports Seekers	45
Nature Inspired	11
Recreation and Relaxation	15
<u>FIT vs. Group</u>	
FIT	90
Group	10
<u>Most Recent Trip Destination</u> (with significant ski product)	
Europe	32
Canada	22
U.S.	21
Japan	16
<u>Interest in Visiting Canada</u>	
Interest in Visiting Canada in next 2 years	39
Very likely to visit Canada in next 12 months	26

Source: Quantitative survey Q. 19a1

¹ 19a) Which, if any, of the following activities did you participate in while on that trip to
(DESTINATION IN Q. 8a

7.7 Summary

The latent demand for Canada (872,000 claim to be very interested in visiting in the next 12 months) far exceeds current visitor arrivals (199,691 in 2006).

Essential will be to provide product to meet their needs. The ideal trip to Canada would involve:

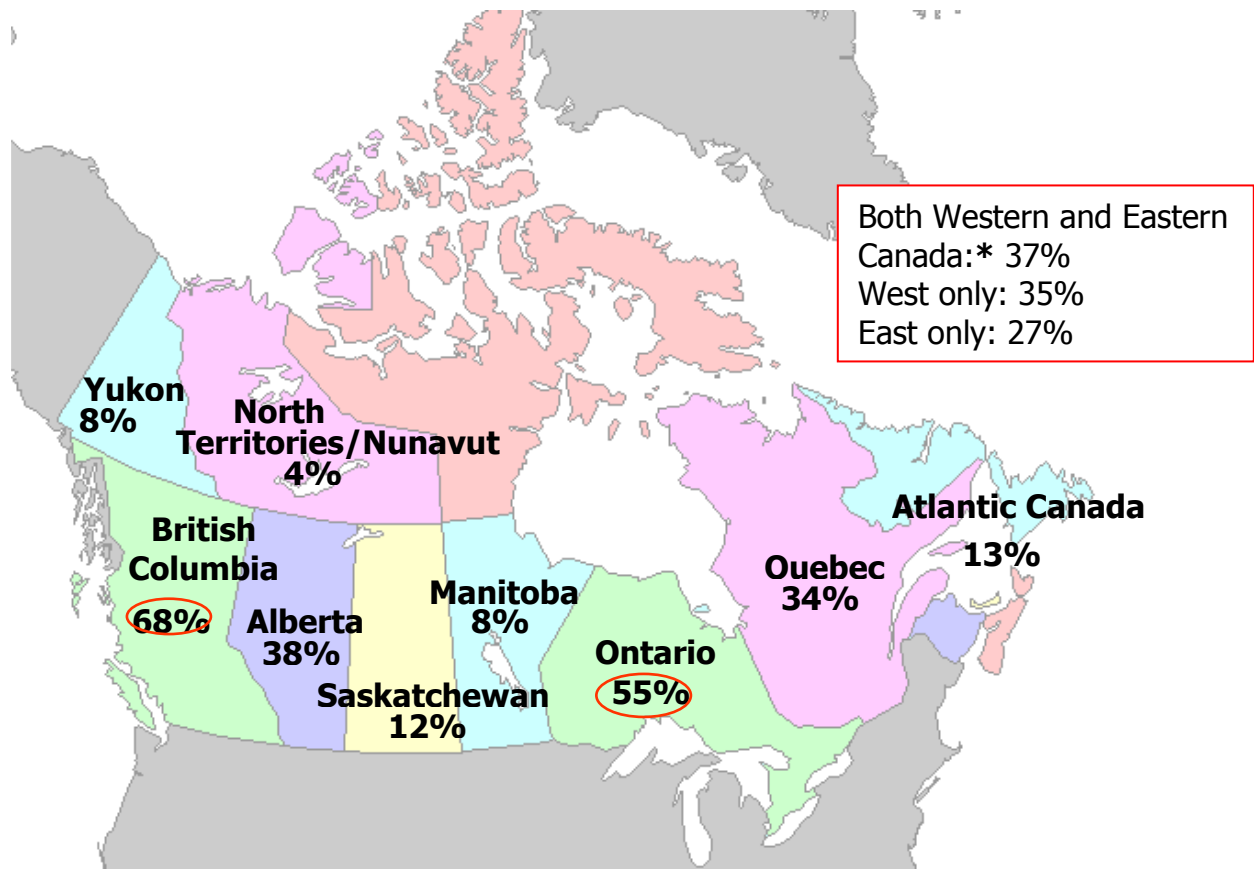
- Visiting the U.S. (66%) and/or Europe (36%) as well on the journey.
- Spending 3 weeks in Canada, travelling across the country.
- Canadian resorts are popular accommodation choices – whether mountain or lakeside.
- A coastal cruise is highly appealing to older travellers (to 30% age 60+).
- Younger travellers are particularly drawn to outdoor soft adventure – not only skiing/snowboarding but camping and canoeing/kayaking as well.
- Visiting a spa is highly appealing to 18 to 29 age group (66%).
- Older travellers are less interested in soft adventure and are attracted more to nature, sightseeing and Canadian culture.
- Most prospective travellers prefer FIT (79%) but FIT packages are of interest to 36% - confirming the importance of providing packaged products.

Section 8: Regional Opportunities

8.1 Places Visited in Canada

British Columbia is clearly a popular province to visit for Australians (68%). However, Ontario draws over half (55%), reinforcing its appeal as well.

EXHIBIT SECTION 8-1: PLACES VISITED IN CANADA



Source: Quantitative Survey Q.8b1

¹ Base = Past 3 years travellers to Canada (n=406)

Q. 8b **IF CANADA IN Q. 8a) ASK)** While you were in Canada on that trip, which of the following places did you visit, if any?

***Eastern Canada includes Ontario, Quebec and Atlantic Canada**

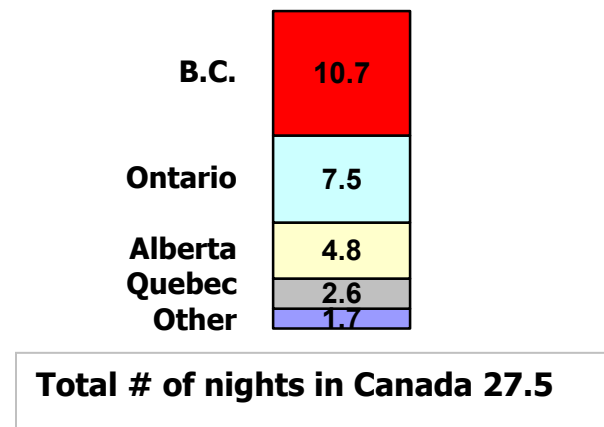
Western Canada includes Manitoba, Saskatchewan, Alberta, British Columbia, Yukon, NT/Nunavut

8.2 Duration – By Province

In terms of overall nights, British Columbia captures an average of 10.7 nights out of 27.5 in Canada. Ontario accounts for 7.5 nights.

EXHIBIT SECTION 8-2: NUMBER OF NIGHTS SPENT IN EACH PROVINCE

Among Past 3 Years Travellers to Canada



Source: Quantitative Survey Q.10d¹

¹ Base= n=406

Q. 10d **(IF CANADA IN Q. 8a) ASK (ONLY LIST PLACES VISITED IN Q. 8b)** How many nights did you spend in each area on that trip?

8.3 Trip Characteristics

British Columbia

Among Australians visiting British Columbia, about half also venture into Alberta. Also half include Eastern Canada on their journey.

In terms of share of nights, B.C.'s visitors are away from home an average of 56.6 nights, 31.5 of which are spent in Canada and only 15.9 in B.C. – a 28% share of trip nights. Consequently, there is a potential opportunity to encourage Australia visitors to spend more time in the province.

Other trip characteristics:

- Season – broadly distributed across all seasons.
- FIT – 89% FIT, as many as 62% travelling fully independently with no package.
- Accommodation: hotels/motels most common, mid-priced preferred.
- Purpose of Trip: about one third come to visit a friend or relative and are staying with them. Others are sightseeing with a focus on outdoor experiences. However, only 21% come to ski/snowboard specifically.

Ontario

Half of Ontario visitors from Australia also include Quebec in their journey. Western Canada draws just over half (56%). Ontario captures only 21% of trip nights – 13.7 out of 66.8 in total. As with B.C., the province should focus on trying to increase the stay of existing visitors.

Other trip characteristics:

- Season - April to September is the most popular season of travel (63%).
- FIT – the vast majority are FIT (92%), 65% no package at all.
- Accommodation – half (47%) stay with friends/relatives, many others preferring mid-priced hotels/motels (51%).
- Purpose of trip – VFR (56%), city sightseeing (60%), outdoor activities only 34%.

8.3 Trip Characteristics

EXHIBIT SECTION 8-3: TRIP CHARACTERISTICS — AMONG THOSE WHO VISITED B.C. AND ONTARIO ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
<u>Other Canadian Regions Visited</u>		
Western Canada (net)	100	56
British Columbia	100	54
Alberta	51	33
Saskatchewan/Manitoba	26	26
Yukon/NWT	17	11
Eastern Canada (net)	51	100
Ontario	44	100
Quebec	31	50
Atlantic	15	17
<u>Duration (Avg)</u>		
Total nights on trip	56.6	66.8
Nights in Canada	31.5	35.9
Nights in province (B.C./Ont.)	15.9	13.7
<u>Month of Travel</u>		
January-March	20	18
April-June	28	29
July-September	31	34
October-December	21	19
<u>FIT vs Group</u>		
Total FIT	89	92
FIT - benefit package	27	25
FIT - no package	62	65
Total Group	11	8
<u>Type of Accommodation</u>		
Mid-priced hotel/motel	48	51
Home of friend or relative	39	47
Luxury hotel	27	22
Budget hotel/motel	27	32
Resort (beach, ski)	12	10
Country inn/bed and breakfast	9	11
Apartment hotel/condo/timeshare	12	11
Youth hostel/university accommodation	17	17
Rented cottage	5	4
Cruise ship	11	4
Campground	6	5
Lodge (hunting, fishing)	4	3
Trailer/motor home/van	2	2
Other	4	3
<u>Trip Expenditure</u>		
Under \$8,000	26	26
\$8,000 - < \$12,000	19	23
\$12,000 - < \$14,000	9	10
\$14,000 - < \$20,000	20	18
\$20,000+	26	22
Mean (\$A)	14,300	13,500
<u>Value for Money</u>		
Excellent value	31	30
Very good value	38	38
Good value	25	29
Fair value	6	3
Poor value	*	1

8.3 Trip Characteristics

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
<u>Purpose of Trip - All</u>		
<u>Sightseeing (Net)</u>	71	71
Sightseeing - mainly city	55	60
Sightseeing - mainly nature	44	36
<u>A visit to see friends and relatives (net)</u>	50	56
A visit to see friends and relatives	35	37
A visit to see friends/relatives combined with additional leisure travel away from friends and relatives	29	34
To experience different cultures and ways of life	38	35
To visit historical sites and important places in history	29	27
To relax, unwind and decompress in a large country	32	26
<u>Outdoor Activities (net)</u>	44	34
Outdoor adventure/recreational activities	38	30
To participate in skiing/snowboarding	21	13
To visit a popular, trendy place	16	18
To experience unspoiled nature	33	26
A trip that combined business with additional leisure travel	6	7
To take a coastal cruise	14	7
To see if it is a good place to immigrate to	5	8
Travelling on a working visa	7	8
Other Reasons	7	8

Source: Quantitative survey Q.8b, 9a, 10, 11, 16, 18, 19b-c¹

- ¹ Q.8b **(IF CANADA IN Q. 8a) ASK)** While you were in Canada on that trip, which of the following places did you visit, if any?
- Q.9a What were your reasons for travelling to **(Q.8a DESTINATION)**
- Q.10 On that trip to **(Q. 8a) DESTINATION)**, how many nights, in total, were you away from home?
- Q.11 And when did you take that trip to **(DESTINATION IN Q.8a)**
- Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?
- Q.18 In what type of accommodation did you stay?
- Q.19b What was the total cost of that trip to **(DESTINATION IN Q. 8a)** for you and your immediate travel party, including airfare and all other costs?
- Q.19c Overall, how would you rate that trip on value for money – excellent, very good, good, fair, poor value for money?

*Less than 0.5%

8.4 Activities Participated In

British Columbia

The trip activities data that follow relate to all places visited on the journey (of 56.6 nights on average), not just in British Columbia (15.9 nights). Consequently, they cannot all be attributable to the province.

The focus on outdoor scenery is likely B.C. related (possibly Alberta as well). However, note the high involvement in both urban and cultural activities – getting to know local inhabitants, visiting museums and art galleries, fine dining, seeing Canadian architecture and history.

Consequently, a strategy designed to lengthen visitor's stays in the province may include focusing on the urban benefits (e.g., Vancouver, Victoria, smaller communities in the interior), not just outdoor.

Ontario

As with B.C., trip activities relate to all places visited, not just Ontario. However, the travellers are clearly involved in a well rounded vacation covering both urban and rural focused activities, VFR and undoubtedly Niagara Falls.

An emphasis on the excellent outdoor activities available in Ontario (especially water/lake based due to the appeal of Canadian water focused scenery) balanced against urban/culture activities could help to lengthen the time spent in the province.

As many as 52% travelled by train – another specific activity that could be worth exploiting – for example, taking the train from Toronto to Montreal or one of the northern Ontario excursions (e.g., Agawa Canyon, Moosonee).

8.4 Activities Participated In

EXHIBIT SECTION 8-4: ACTIVITIES PARTICIPATED IN — AMONG THOSE WHO VISITED B.C. AND ONTARIO ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
Activities Participated In		
Visiting places of historical interest	77	78
Fine dining	68	64
Seeing old architecture	62	63
Getting know the local inhabitants	69	65
Seeing modern cityscapes	77	79
Seeing beautiful beaches and coastlines	61	56
Visiting friends or relatives	61	67
Spending time as a family	51	51
Visiting museums and galleries	62	64
Driving trip/touring	62	65
Seeing beautiful rivers or waterfalls	84	87
Visiting majestic mountains	84	67
Visiting world heritage sites	57	61
Attending theatres, clubs or shows	53	63
Travelling by train	49	52
Seeing wildlife in their natural environment	76	63
Sunbathing or other beach activities	27	30
Visiting wilderness areas	75	63
Trekking in a nature area	58	51
Taking a cruise	36	28
Staying at a luxury resort	28	26
Taking a garden or flower tour	32	27
Visiting a spa	23	21
Visiting children's theme parks	23	26
Attending a sporting event	36	42
Aboriginal cultural experiences, celebrations, and attractions	34	23
Canoeing/kayaking/boating	32	29
Fishing	16	18
Taking a wine tour	18	16
Extreme sports	18	13
Camping	20	18
Golfing	10	11
Staying on a farm (agri-tourism)	10	13
Skiing or snowboarding	34	25
Whale watching	24	15
Dog-sledding	15	10

Source: Quantitative Survey Q.19a¹

¹ 19a) Which, if any, of the following activities did you participate in while on that trip to
(DESTINATION IN Q. 8a)

8.5 Travel Party

British Columbia

The most common party composition is with a spouse or significant other (51%) or alone (28%).

Very few are in a group (11%).

Ontario

Again, spouse/significant other is the most likely combination (44%). One in three travels alone (34%).

Group travel is also low (8%).

8.5 Travel Party

EXHIBIT SECTION 8-5: TRAVEL PARTY — AMONG THOSE WHO VISITED B.C. AND ONTARIO ON MOST RECENT CANADIAN TRIPS

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
<u>FIT vs. Group</u>		
Immediate party only	89	92
Part of larger group	11	8
<u>Party Composition</u>		
Spouse/significant other	51	44
Travelled alone	28	34
Children	14	14
Friends	14	15
Other relatives	7	6
Parents	7	9
Organized group/club	2	2
Business associates/colleagues	1	1

Source: Quantitative survey Q.12, 16¹

¹ Q.12 With whom did you travel on that trip to **(DESTINATION IN Q.8a)**

Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?

8.6 Trip Planning

British Columbia

As with other Pacific/Asian origin markets, television travel shows are important sources of inspiration, as is the internet. However, the influence of friends and relatives is the single most important driver.

Travel agents dominate the booking channels (72%).

Lead time:

- Planning – 30.7 weeks in advance
- Booking – 16.2 weeks in advance

Ontario

Similar to B.C.'s visitors, friends and relatives are prime influencers, as are television travel shows and, predictably, the internet.

Travel agents again dominate at the retail level (73%).

Lead time:

- Planning – 31.3 weeks in advance
- Booking – 16.2 weeks in advance

8.6 Trip Planning

EXHIBIT SECTION 8-6: TRIP PLANNING — AMONG THOSE WHO VISITED B.C. AND ONTARIO ON MOST RECENT CAR TRIP

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
All Source of Inspiration for Trip Planning		
Friend or relative	56	52
Public Relations (net)	29	30
Television travel shows	24	23
Story in magazine or newspaper	9	7
Other television show	6	5
The internet	21	22
Advertising	13	10
Travel agent	16	14
Planning Horizons		
Average # of weeks	30.7	31.3
Booking Horizons		
Average # of weeks	16.2	16.2
How Trip was Booked		
Booked through a travel agent/package provider (net)	72	73
In person	57	59
Via phone	10	9
Online	10	9
Airline (net)	28	28
Via their website	21	20
Via phone, email or in person	10	10
Hotel (net)	18	21
Via their website	17	18
Via phone	4	6
Other online travel supplier	11	7
Website of a country/city/province tourism authority	4	4
Other	4	3
Total Online	63	59

Source: Quantitative Survey Q.14a, 15 a-c¹

¹ Q.14a Were any of the following a source of inspiration for you to decide to travel to (DESTINATION IN Q.8A).

Q.15a How long before your trip did you definitely decide to go on that trip to

(DESTINATION IN Q.8a)

Q.15b And how long before your trip did you actually book it?

Q.15c How did you book that trip?

8.7 Traveller Profile

British Colombia

Sydney (41%) and Melbourne (26%) are the main sources of British Columbia's Australian tourists.

Also, they tend to be:

- Relatively young (54% under 40)
- Have close friends/relatives in Canada (49%)
- Married (64%)
- No kids at home (66%)
- Employed and well educated

Ontario

Melbourne (33%) and Sydney (32%) are key tourist producers for Ontario.

Travellers are also:

- Young (61% under 40)
- Have close friends/relatives in Canada (57% - higher than for B.C.)
- Married (59%), but often single (33%)
- Employed and well educated

8.7 Traveller Profile

EXHIBIT SECTION 8-7: PROFILE OF THOSE WHO VISITED B.C. AND ONTARIO ON MOST RECENT CANADIAN TRIPS

	Visited on Recent Canadian Trip	
	<u>British Columbia</u>	<u>Ontario</u>
	(272)	(228)
	%	%
<u>Age</u>		
18-29	30	35
30-39	24	26
40-49	18	13
50-59	14	16
60+	14	10
<u>Gender</u>		
Male	47	47
Female	53	54
<u>City</u>		
Sydney/New South Wales	41	32
Melbourne/Victoria	26	33
Brisbane/Queensland	13	15
Perth/Western Australia	10	8
Adelaide/South Australia	6	7
Hobart/Tasmania	1	2
Canberra	3	4
<u>Close friends/relatives in Canada</u>		
Yes	49	57
No	50	42

8.7 Traveller Profile

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
<u>Marital Status</u>		
Married/living together/de-facto	64	59
Single	26	33
Divorced/widowed/separated	9	7
<u>Household Composition</u>		
Adults only	66	70
With children<18	34	30
<u>Occupation</u>		
<u>Total Employed</u>	<u>69</u>	<u>72</u>
White collar worker	18	17
Blue collar worker	4	5
Manager	10	9
Professional	19	23
Self employed	9	6
Skilled workers	3	4
Semi/unskilled worker	2	3
Part-timer	5	6
Student	7	8
Housewife	4	2
Retired	14	12
Other	3	4

8.7 Traveller Profile

	Visited on Recent Canadian Trip	
	British Columbia	Ontario
	(272)	(228)
	%	%
<u>Education</u>		
Some secondary/technical school	7	10
Intermediate/form 4/year to 5th		
form/leaving/year 11	12	9
Finished tech./matric/HSC/year 12	14	14
Some/now at university	11	14
Have diploma or degree	54	52
<u>Household Income (Aus)</u>		
Under \$35,000	11	13
\$35,000-<50,000	13	14
\$50,000-<75,000	17	18
\$75,000-<100,000	18	18
\$100,000+	29	25

Source: Quantitative Survey Q.1,2,3a,26-32 (basic data)¹

¹ CAD Equivalent (Bank of Canada exchange rate, February 28, 2007)

<\$35,000=<\$32,316 CAD

\$35,000 - \$50,000=\$32,316 - \$46,165 CAD

\$50,000 - \$75,000=\$46,165 - \$69,248 CAD

\$75,000 - \$100,000=\$69,248 - \$92,330 CAD

\$100,000+ =\$92,330+ CAD

8.8 Summary

British Columbia

B.C. is currently attracting 7 in 10 Australian visitors—an excellent market penetration among Canadian visitors.

Clearly, the province's spectacular scenery and outdoor recreation opportunities are key draws.

However, the significance of VFR cannot be ignored since 50% also visit friends or relatives.

Ontario

Ontario draws about half to the province (55%). Given that the average visitor to Canada is away from home for close to 2 months, and only a minority of that time is spent in Canada, Ontario should encourage visitors to travel across the country to take in Eastern Canada's own unique natural scenery (especially its lakes as well as Niagara Falls).

Over half are also on a VFR trip (56%), so encouraging this connection is important as well.

An Opportunity

Both provinces should seriously consider creating special events or festivals specifically designed to welcome and involve Australian visitors. With the significant VFR connection to Canada (22% of the outbound travel market have close friends or relatives here), a trigger to encourage prospective visitors to come to Canada now, rather than procrastinate, could be all that is required to say:

"Maybe this is a good year to visit Canada"

This strategy, of course, could apply to many of Canada's overseas markets, but may be particularly appealing to Australians because they respond so well to friendliness and a welcoming attitude.

It is also a strategy that best fits at the local level rather than a national level.

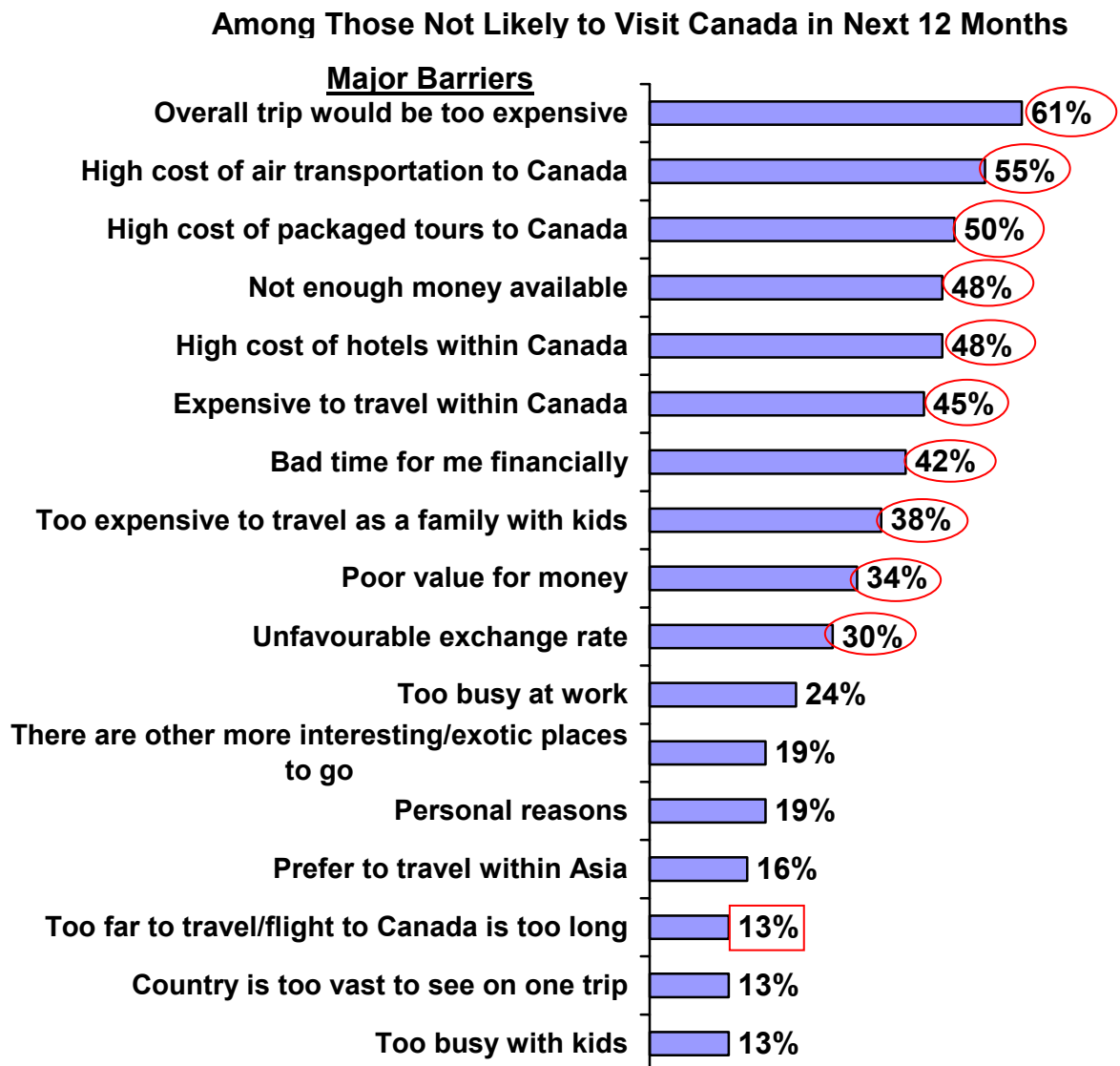
Section 9: Claimed Barriers to Canada Travel

9.1 Major Barriers to Canada Travel

The high cost of travel is a major barrier for prospective visitors to Canada. The top ten barriers all relate to cost.

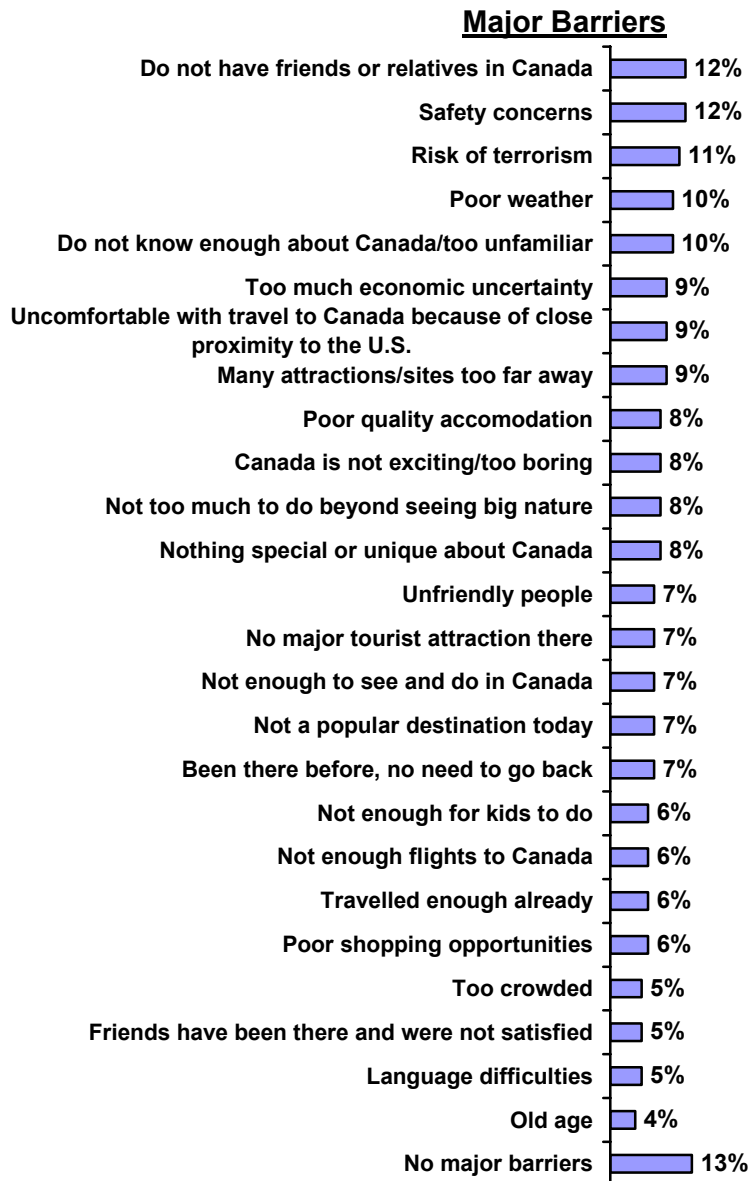
As the focus groups expressed, distance is not a significant deterrent for Australians who are resigned to the fact that long flights are inevitable with overseas travel.

EXHIBIT SECTION 9-1: MAJOR BARRIERS TO CANADA TRAVEL



9.1 Major Barriers to Canada Travel

Among Those Not Likely to Visit Canada in Next 12 Months



Source: Quantitative Survey Q. 25¹

¹ Base=n=1,875

Q.25 Listed below are several potential barriers that could affect your interest in taking a pleasure trip to Canada in the near future. Please indicate for each whether, for you personally, it is a major barrier, a minor barrier, or not a barrier at all.

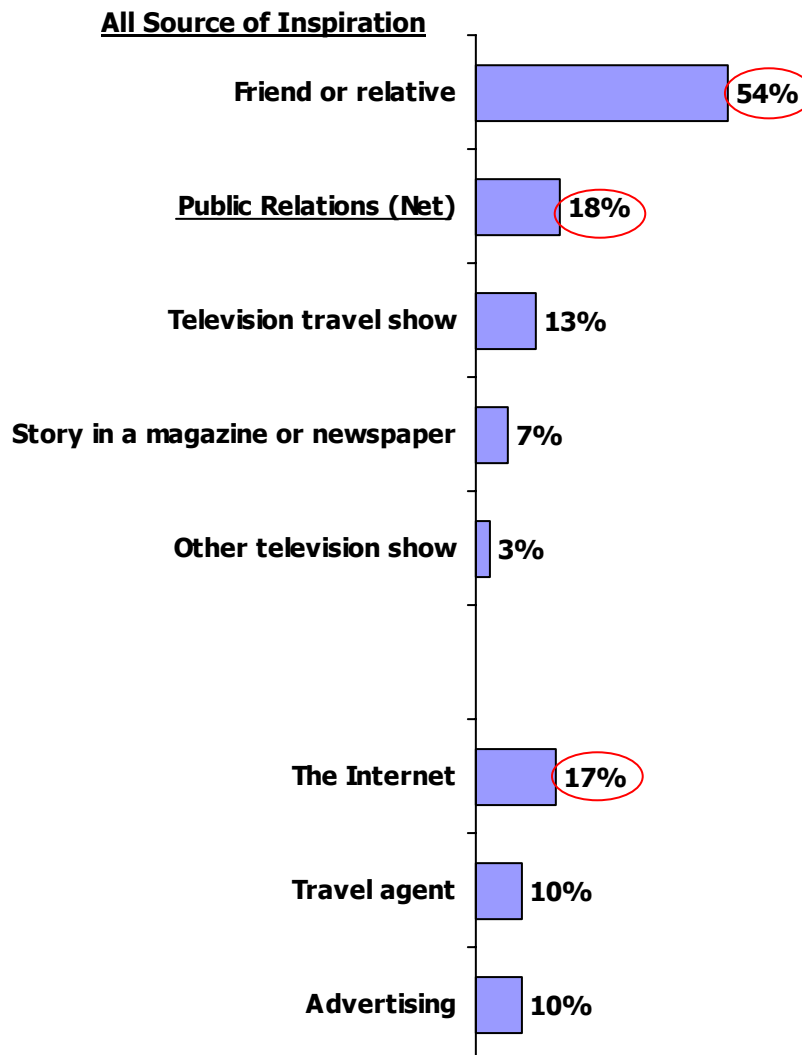
Section 10: Media

10.1 Source of Inspiration

Friends and relatives are the key source of inspiration for choosing a destination. However, television shows and other media influences are also major factors, as is the internet.

EXHIBIT SECTION 10-1: ALL SOURCE OF INSPIRATION — BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.14a¹

¹ Base=n=2,088

Q.14a Were any of the following a source of inspiration for you to decide to travel to (DESTINATION IN Q.8A)?

10.2 Source of Inspiration – by Destination

For trips to Canada and the U.S. travel television shows are significant influencers, more so than for Europe and Asia. Travel agents also figure prominently with trips to Canada, particularly with trips destined to or from Europe (see Detailed Tabulation). Agents, then, may be recommending a via Canada routing.

EXHIBIT SECTION 10-2: ALL SOURCE OF INSPIRATION – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
Source of Inspiration - All					
Friend or relative	53	60	62	56	56
Public Relations (Net)	18	15	12	24	25
Television travel shows	13	10	9	18	21
Story in magazine or newspaper	8	7	5	9	7
Other television show	2	3	2	8	5
The Internet	18	16	16	20	21
Travel agent	11	10	10	10	15
Advertising	11	8	8	10	11

Source: Quantitative Survey Q.14a

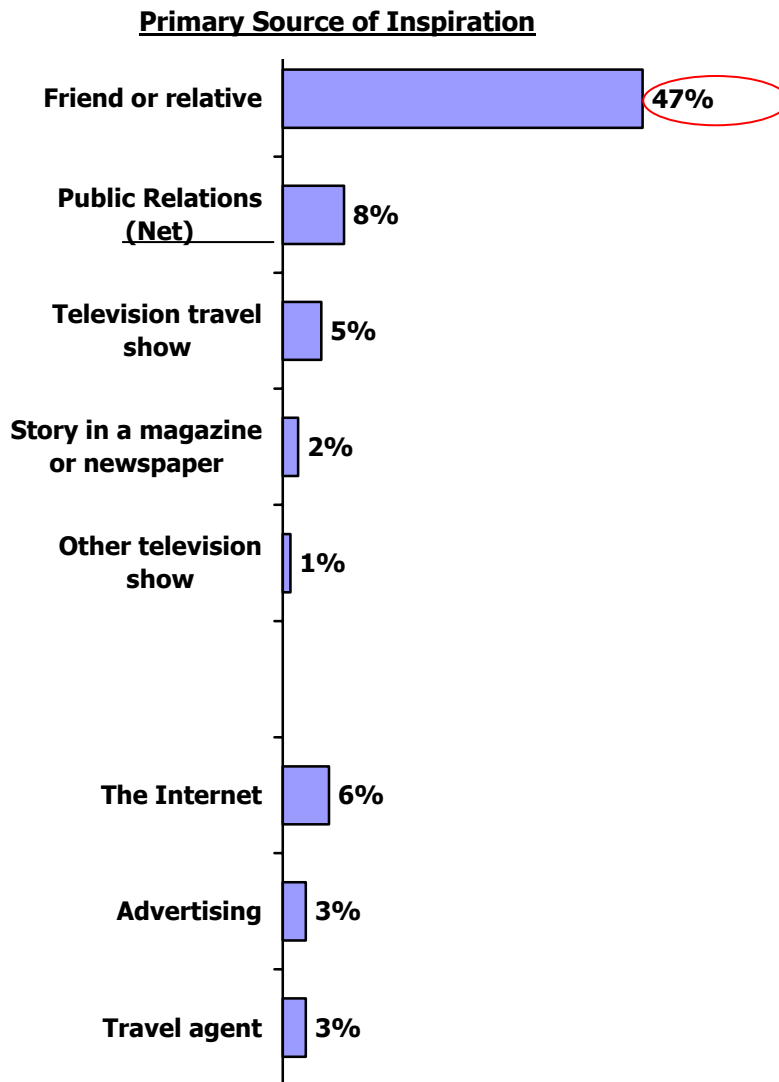
Q.14a Were any of the following a source of inspiration for you to decide to travel to (DESTINATION IN Q.8A)?

10.3 Primary Source of Inspiration

Friends and relatives are the prime source of destination inspiration. As noted earlier, Australians place high importance on VFR when travelling.

EXHIBIT SECTION 10-3: PRIMARY SOURCE OF INSPIRATION — BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.14b¹

¹ Base=n=2,088

Q.14b Which of those was the main source of inspiration for choosing that destination?

10.4 Primary Source of Inspiration – by Destination

The importance of friends and relatives as a source of inspiration affects all destinations.

EXHIBIT SECTION 10-4: PRIMARY SOURCE OF INSPIRATION – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Primary Source of Inspiration</u>					
Friend or relative	46	52	55	47	48
Public Relations (Net)	8	5	4	12	11
Television travel shows	5	3	2	8	7
Story in magazine or newspaper	2	2	1	1	2
Other television show	1	*	*	3	1
The Internet	8	7	6	5	8
Advertising	4	2	2	3	5
Travel agent	4	3	3	3	4

Source: Quantitative Survey Q.14b

Q.14b Which of those was the main source of inspiration for choosing that destination?

*Less than 0.5%

10.5 Specific Sources Used for Trip Decision

"Getaway" leads the list of influencers from television.

EXHIBIT SECTION 10-5: SPECIFIC TV TRAVEL SHOW AND OTHER TV SHOWS USED

Percent Among Travellers Using Each Medium

<u>Television Travel Shows (n=280)</u>		<u>Other Television Shows Used (n=61)*</u>	
<u>Major Mentions</u>	<u>%</u>	<u>Major Mentions</u>	<u>%</u>
"Getaway"	71	Getaway	17
"The Great Outdoors"	21	Movies (non-specific)	9
Discover channel/Discovery Travel Show	3	CSI	5
Fox Tel TV	2	TV shows about the country	5
Channel 9	2	Las Vegas	5
Pilot guides	1	The great outdoors	5
		TV shows filmed in those countries	5
		Documentary (non-specific)	3
		Travel documentary/travel shows	3
		National Geographic	3

Source: Quantitative Survey Q.14 c, d

*Caution=small base size

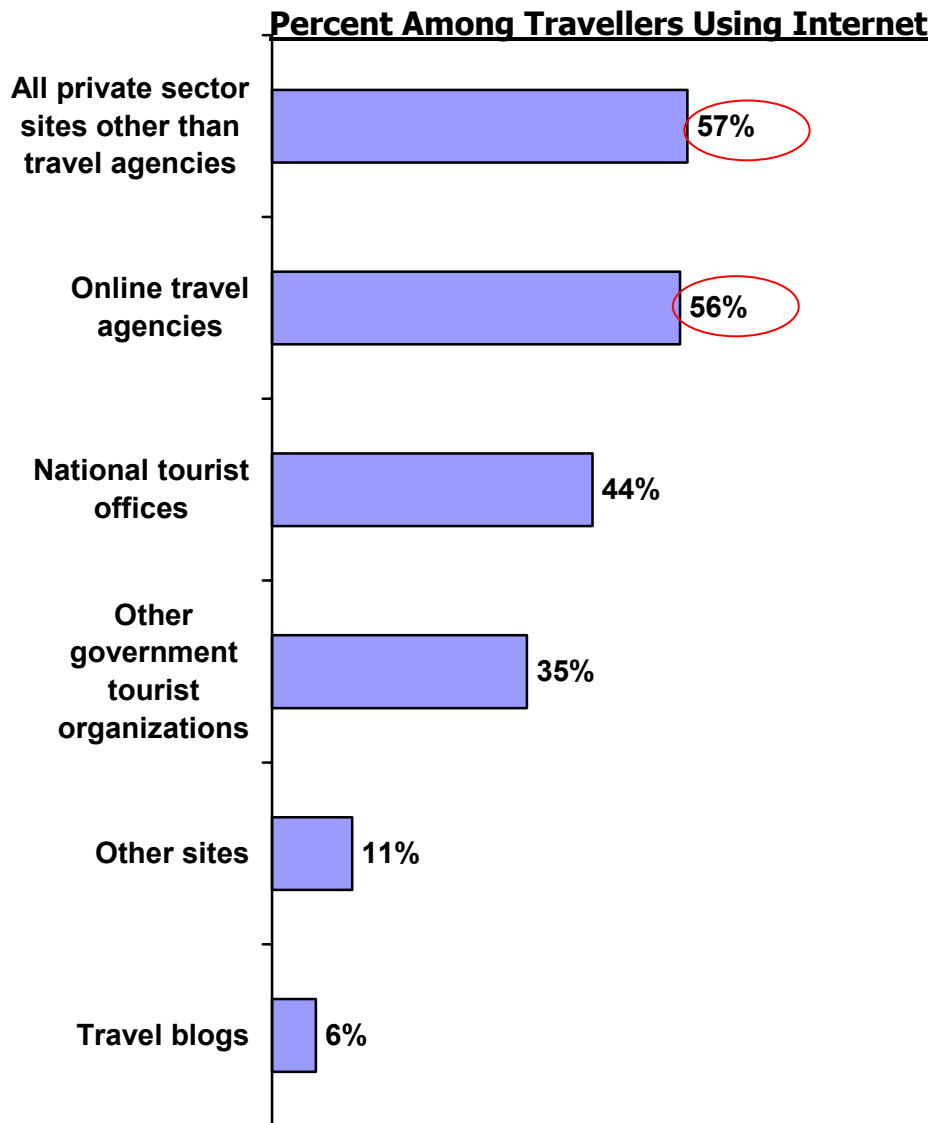
Q.14c **(IF TELEVISION TRAVEL SHOWS IN Q.14a) ASK** You mentioned "television travel shows" as a source of inspiration, which television travel shows in particular were a source of inspiration?

Q.14d **(IF OTHER TELEVISION SHOWS IN Q.14a) ASK** You mentioned "other television shows" as a source of inspiration, which television shows in particular were a source of inspiration?

10.6 Specific Websites Used for Trip Decision

Online travel agencies and private sector sites are the most popular internet sites. However, NTO's do figure prominently in the discussion process (44%).

EXHIBIT SECTION 10-6: SPECIFIC WEBSITES USED



Source: Quantitative Survey Q.14e¹

¹ Base=n=367

Q.14e **(IF INTERNET IN Q. 14a) ASK** You mentioned that you use the Internet as a source of inspiration. Did you use any of the following sites?

10.7 Summary

Given the importance of VFR travel to Australians, it is not surprising that friends and relatives drive the destination decision for half of all long-haul trips.

However, beyond the VFR factor, non-commercial media (e.g., television travel shows) and the internet are both critical catalysts.

- “Getaway” is the most influential television show
- Online travel agencies, other private sector sites and NTO’s are all influential internet channels.

Section 11: Trip Planning

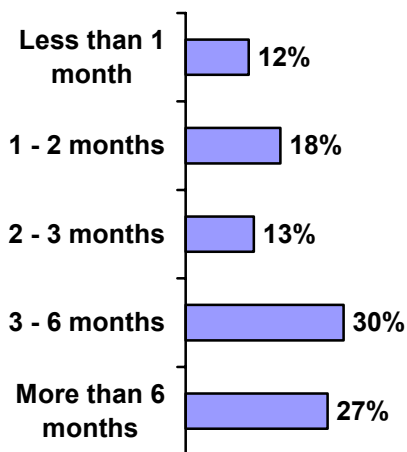
11.1 Trip Planning/Booking Leadtime

Australians plan their trip 6 to 7 months in advance of travel, booking them 3 ½ months in advance.

EXHIBIT SECTION 11-1: TRIP PLANNING/BOOKING LEADTIME — BY ALL DESTINATIONS

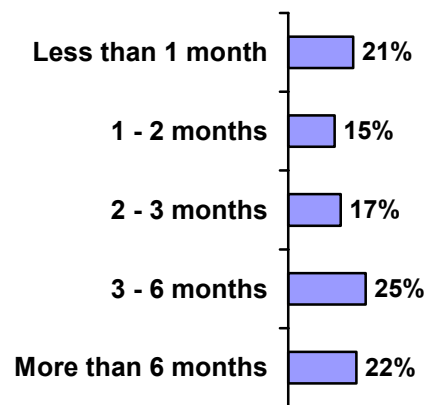
Percent Among Past 3 Year Travellers

Planning Leadtime



Average # of weeks 26.2

Booking Leadtime



Average # of weeks 14.0

Source: Quantitative Survey: Q. 15a,b¹

¹ Base=n=2,088

Q.15a How long before your trip did you definitely decide to go on that trip to
(**DESTINATION IN Q.8a**)?

Q.15b And how long before your trip did you actually book it?

11.2 Trip Planning/Booking Leadtime – by Destination

Planning and booking leadtime for Canada are typical for long-haul destinations beyond Asia.

EXHIBIT SECTION 1 1-2: TRIP PLANNING/BOOKING LEADTIME – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Total	U.K.	U.S. Mainland	Canada
	(1118) %	(688) %	(450) %	(337) %	(406) %
<u>Planning Leadtime</u>					
Less than 1 month	14	10	10	10	8
1 - 2 months	20	14	13	17	16
2 - 3 months	14	11	10	11	12
3 - 6 months	30	32	34	32	27
More than 6 months	22	33	33	30	37
<u>Average # of Weeks</u>	22.5	30.2	29.5	26.3	30.0
<u>Booking Leadtime</u>					
Less than 1 month	23	16	16	17	16
1 - 2 months	16	14	13	12	12
2 - 3 months	18	14	13	14	17
3 - 6 months	25	26	29	31	24
More than 6 months	17	30	29	26	31
<u>Average # of Weeks</u>	12.1	16.8	15.6	14.8	16.3

Source: Quantitative Survey Q.15a,b

Q.15a How long before your trip did you definitely decide to go on that trip to
(DESTINATION IN Q.8a)?

Q.15b And how long before your trip did you actually book it?

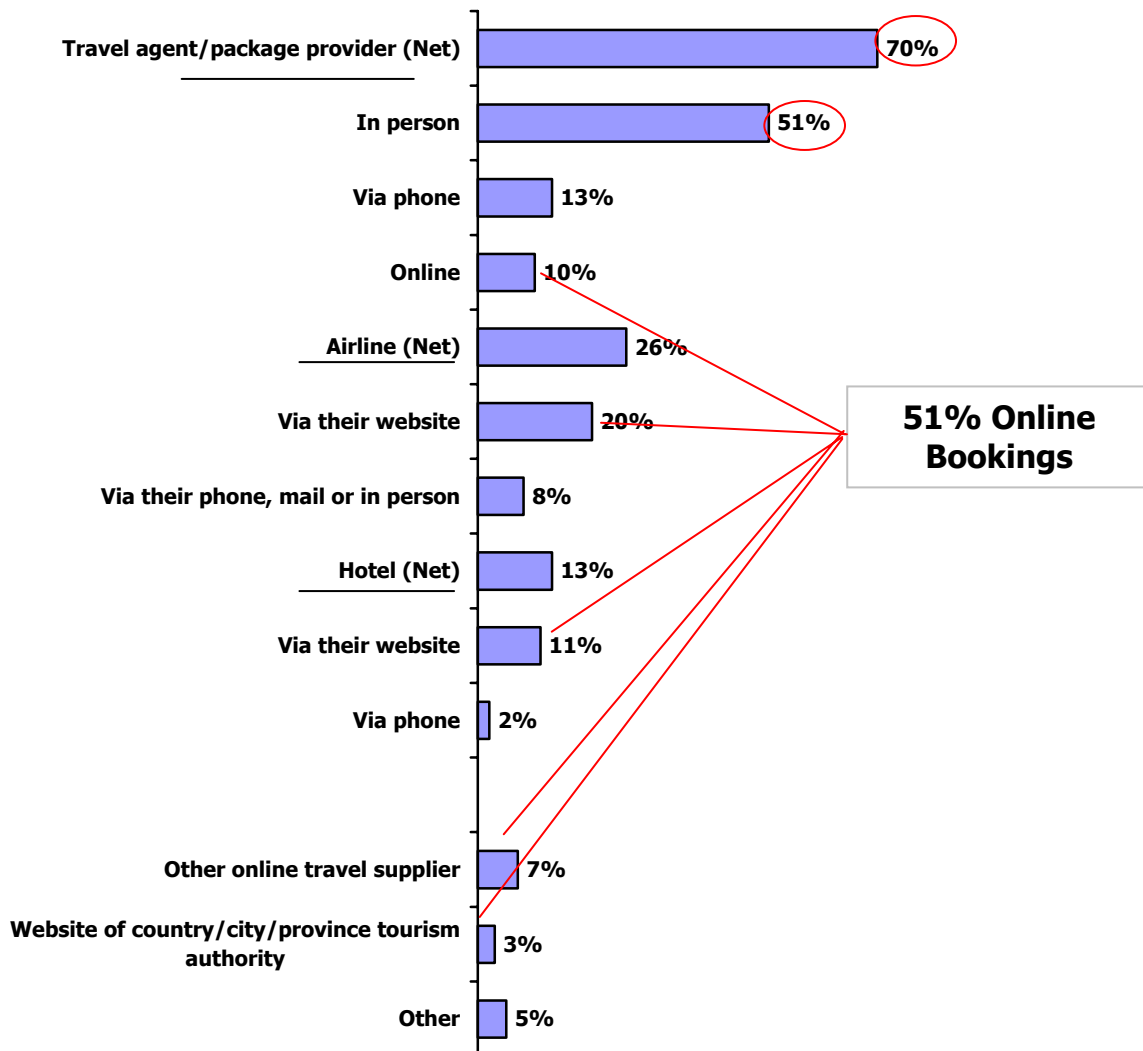
11.3 How Trip Was Booked

The vast majority book through travel agents (70%), most often in person (51% in total). However, online bookings are very significant – representing half of all bookings.

EXHIBIT SECTION 1 1-3: HOW TRIP WAS BOOKED – BY ALL DESTINATIONS

Percent Among Past Travellers

Trip Booked Through:



Source: Quantitative Survey Q.15c¹

¹ Base=n=2,088

Q.15c How did you book that trip?

11.4 How Trip Was Booked – by Destination

Online bookings are very common for long-haul beyond Asia – 60% of bookings for Canada. However, the agent is still very important for Canada (73%), regardless of contact method.

EXHIBIT SECTION 1 1-4: HOW TRIP WAS BOOKED – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia	Europe	U.K.	U.S. Mainland	Canada
	(1118)	(688)	(450)	(337)	(406)
	%	%	%	%	%
<u>Trip Booked Through:</u>					
<u>Travel agent/package provider (Net)</u>	<u>70</u>	<u>73</u>	<u>73</u>	<u>70</u>	<u>73</u>
In person	51	53	54	49	57
Via phone	13	12	11	11	11
Online	10	12	12	14	11
<u>Airline (Net)</u>	<u>27</u>	<u>26</u>	<u>29</u>	<u>30</u>	<u>27</u>
Via their website	21	21	23	22	20
Via phone, email or in person	8	7	8	10	11
<u>Hotel (Net)</u>	<u>12</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>18</u>
Via their website	11	16	17	17	17
Via phone	2	2	2	4	4
Other online travel supplier	6	8	9	10	10
Website of a country/city/province tourism authority	3	4	4	4	4
Other	5	5	4	8	4
Total Online	50	60	65	67	60

Source: Quantitative Survey Q.15c

Q.15c How did you book that trip?

11.5 Summary

Australians plan their trip to Canada well in advance (56% 5 or more months prior to departure, 78% 2 or more months) and book at least 3 months in advance (55%, 72% 2 or more months prior). Consequently, product promotion must be timed well in advance of the travel season.

Most book through travel agents or package providers (73%) when organizing Canadian vacations.

However, even with the high level of FIT travel (9 in 10 trips to Canada), booking direct with an airline is only practiced by 27% going to Canada.

Section 12: The Travel Trade

12.1 Introduction

This summary is based on 15 interviews with people who are involved in the business of selling or promoting recreational/holiday travel to Canada from Australia. The interviews provided a lot of useful information but cannot on their own provide a complete or fully rounded analysis of what is a complex segment (i.e. Canada travel) within a very complex market (i.e. long haul recreational travel by Australians). Thus the reader is encouraged to use this section as a basis for generating ideas and for gaining a better understanding of the current state of the Australian market for travel to Canada. The temptation to use this qualitative feedback in isolation from the quantitative survey and other industry data available to CTC should be resisted.

Also, keep in mind that the majority interviewed were tour operators and wholesalers who lean toward group travel in their business. Hence, the perspective provided is somewhat biased toward the group market. As the quantitative survey confirmed, the majority of Australian visitors are FIT.

12.2 Canada in Perspective

This is a market in which numerous players have an impact on travel to Canada. The players who have done most to promote the market are the major wholesalers who sell escorted travel to Canada. One of these companies is the Australian based Scenic Tours which is acknowledged as the leader in the recent promotion of travel to Canada. Scenic's products have been successfully cloned or copied by other wholesalers such as Trafalgar and Globus. Scenic essentially invented the West Coast Experience (WCE) for Australian travellers and have promoted this type of travel very aggressively (including live outside broadcasts to Australian lifestyle TV shows). The growth of this Canadian market sub-segment (i.e. the WCE) is said to be exponential and continuing to grow strongly.

The other key players in the market include various GSA's (General Sales Agents) who act as Australian sales agents for Canadian products e.g., The Rocky Mountaineer; local representatives of provincial travel authorities (Tourism British Columbia and Travel Alberta only); specialist travel companies (e.g. adventure travel, farm/agricultural travel); the CTC; ski travel specialists and retail travel agents. An apparently slightly sub-standard player in the marketplace is Air Canada, even though it is the airline with the best flight connections to Canada (via Honolulu). More comments on Air Canada appear in Section 12.4.

There is a consensus that travel by Australians to Canada is growing strongly; with growth particularly strong in the escorted tour segment of the market (rather than FIT) and that this growth is within the overall context of a growing marketplace for long haul recreational travel out of Australia.

In other words Canada is a popular destination for Australians travelling overseas but is in fact still a relatively small market when compared to total long haul travel out of Australia. Australians love to travel overseas (this is the Australian vernacular for discussing long haul travel) and are interested in new products and destinations.

In Australian eyes Canada as a destination is dominated by the West Coast and the West Coast includes everything West of Calgary, including Alaska. Travellers' perceptual perspective on Canada is not restricted by national borders. Alaska (especially as defined by Alaska Cruises) is virtually a part of Canada in terms of travel from Australia.

12.2 Canada in Perspective

The USA is an important destination for Australian travellers and the very limited evidence from the travel trade interviews is that the typical appeal of the USA as a destination is probably quite different to the appeal of Canada (see also Section 12.3). The USA's appeal seems to be more of a cultural experience, visiting the country they see on TV and in the movies. The USA is more of a family destination and more a destination which appeals to younger travellers who want a taste of the culture that dominates their lifestyle and values. Compared to the USA, for younger Australians in particular, Canada is not a country which is as familiar.

The escorted WCE is described as being predominantly a market of people 55 and over and especially older or retired couples. Most of the tours being sold include 5 star hotels and premium services. Affluent Australians love seeing Canada's West in a certain degree of luxury.

The key specialist operators of ski packages to Canada were not available to be interviewed in this research but the suggestion from other wholesalers and experts was that this is also not a young market. However, the market for ski trips to Canada in the current Canadian season is said to be strong but recovering from a poor year when snow cover was limited. Japan is cited as a strong competitor for ski travel with lower prices, guaranteed snow, and more direct travel than to Canada (one, cheaper non-stop flight to Japan and less time travelling and less jet lag from less time change). Colorado is also regaining some popularity as the Australian dollar climbs versus the US dollar.

12.2 Canada in Perspective

According to tour operators and wholesalers, FIT travel to Canada is also growing and is typified by a similar demographic profile to the escorted tour market (55 plus and often retirees). However, the FIT segment is not seen as growing nearly as rapidly as the heavily promoted, escorted WCE (West Coast Experience) packages in their view. FIT travellers are typically described as being more experienced travellers but not necessarily travellers who have visited Canada before.

As already noted the bias of the group market for tourism to Canada has become the WCE and this is a premium priced product. Typical per person tour costs exceed \$10,000 AUD for a 3 week vacation. Undoubtedly there are Australian vacationers to Canada with much smaller budgets but these trade interviews provided little information on those travellers. The quantitative survey, however, does elaborate on the total market (see earlier sections).

12.3 Factors Drawing Australians to Canada

Australians are attracted to Canada by

- Spectacular mountain and coastal scenery
- Natural wonders and wildlife
- The Canadian skiing/winter experience/snow
- Historical and cultural affinity
- An easy cultural experience (English spoken)
- Friendly service and people
- High comfort factor with all aspects including health care. "You can eat the food and drink the water"
- Ease of travel within Canada
- Perceived safety (especially versus the USA)
- No religious or sectarian strife
- Comprehensible and similarly valued currency (reasonable exchange rate)
- Quality services and trouble free travel
- And for those who venture east, cultural diversity to experience in Quebec

In addition, travel to Canada tends to be seasonally influenced. The WCE is a seasonal product and skiing of course is a winter event.

The evidence from the participants in these interviews is that knowledge of Canada as a country is not generally high and is probably less now that it was for previous generations when the links of Empire and Commonwealth were more important or at least more talked about. There is little evidence that Canada as a country does much to promote itself to the general public as a tourism destination in the way Australia does in North America. To many Australians the image of Canada is limited to snow capped mountains, interesting wildlife, the beauties of British Columbia and cruises to the "11th Province", Alaska. There is also the appeal of Canada as a place for a working holiday but these interviews did not provide any insight into the backpacker market to Canada.

Perhaps one of the key suggestions in this summary is that tourism from Australia to Canada is very susceptible to advertising and promotion. A market which was reasonably small has been ignited by the promotional efforts of one wholesaler in co-operation with the CTC and Provincial travel authorities. It is evident that wholesalers are looking for ways to enhance or modify the WCE so that repeat business will be encouraged and reports are that repeat travel is happening. If equal effort were to be put into the marketing of Canada east of the Prairies there may well be substantial potential for growth. To some extent it just has not happened yet.

12.3 Factors Drawing Australians to Canada

The global escorted tour wholesalers (like Trafalgar and Globus) report that they have loyalty to their brands and that the more new ideas they can put before a travel hungry customer base the better. Thus a person who enjoyed a Globus tour of Italy may well be tempted to try a Globus tour of Canada (or China or Egypt for that matter).

Another positive aspect for the travel trade which helps facilitate the market for travel to Canada is the fact that Canada is a market which is easy to deal with. The language is easy, the business worlds of the two countries are similar, there are well established and trustworthy operators of all types (banks, hotels, car rental agencies, transport services, tour operators, bus companies, ferry operators, etc.). At the commercial level the affinity between Sydney and Western Canada is well established. This is less true of the East where Australian tourism businesses have had less to do with suppliers in Ontario, Quebec and the Maritimes.

12.4 Factors Limiting Interest in Canada

One of the chief barriers to travel to Canada according to retail travel agents is said to be the high price of airfares to Canada.

While the booming escorted tour market among mostly older Australians (55+) seems to suggest that cost is not a big factor there is also evidence that those who take the WCE tours often pay well in advance to obtain early bird pricing.

However, there are suggestions from the trade that mass marketing of Canada as a destination, especially for families, rather than well-to-do retired couples, is limited by the cost of an airline ticket to Vancouver (or elsewhere in Canada). It was noted that while discount flights to California often come down to the \$1,300-\$1,500 level, a ticket to Canada always seems to be over \$2,000.

Air Canada policies and practices are criticized or questioned. Encouraging Australians to visit Canada is not seen as an Air Canada priority. Discount return fares from Canada to Australia are often available but flights originating in Australia are sold at higher prices. Air Canada's lack of interest in the Australian market is a constant complaint. The equipment on the route is said to be outdated and the in-flight service/cabin facilities sub-standard. However, only Air Canada flies the preferred route to Canada and has the advantages of avoiding LAX and offering a shorter overall travel time. Qantas is said to be the opposite: keen to expand the market and potentially open up the Sydney-Vancouver non-stop route. In short: Air Canada is not seen as being committed to the Australian market.

Having to sit in a plane for a long time is an unavoidable negative of travel to Canada but does not appear to be a major deterrent. Australians are simply used to the idea that overseas travel involves lengthy uncomfortable flights. Travel to Europe takes just as long but Australians still travel to Europe in large numbers.

Stopping in the USA en route to Canada is virtually mandatory for Australians coming to Canada from the Pacific region. This is accepted because there is no choice. However, many Australians are heading for Vancouver or Alberta and have no intention of spending any time in the USA. The brief past offering of non-stop service from Sydney to Vancouver on Air Canada was not seen as being given enough of a trial to see whether it would work. Many escorted tours are planned and priced at least 12 months in advance and thus the introduction of a non-stop service would need to be promoted and guaranteed with a very long lead time.

12.4 Factors Limiting Interest in Canada

Lack of airline capacity to Canada can occasionally be a problem at certain times in the year, usually May and September. This does not appear to be a major issue.

One interesting limitation on mostly younger Australians travelling to Canada is the reported current unwillingness of US Immigration to allow Australians to enter the USA with a one way ticket. This poses a problem since Australians approaching Canada from the Pacific need to enter the USA, albeit for an hour's stop at Honolulu airport.

Another reason discouraging travel to the rest of Canada (east of Alberta) is the basic low profile of all but the West Coast in advertising and overall media presence. There is no "Sex in the City" or "ER" set in Montreal or Toronto for Australians to watch on TV. On Australian TV Canada is relatively invisible. Australians no longer study Canadian (British Commonwealth) history in schools as was the case for many of the 60-70 year olds riding the Rocky Mountaineer in 2007. Quebec, Ontario and the Atlantic provinces have no offices in Australia to promote their regions. The Eastern and Atlantic regions of Canada are simply not being heavily promoted to Australian travellers.

The three retail travel agents who were interviewed also were critical of both Air Canada and Canada generally for the lack of education or promotion in Australia for Canada as a destination. The Australian travel chain Harvey World Travel is linked to Scenic Tours (the WCE pioneers and innovators) but none of the travel agents who were interviewed worked for that chain. There is possibly some opportunity here to better educate retail agents about Canada. The attitude of the retail agents was that "Canada is a destination that we sell if a customer asks for it". The implication with vacation travel in general is clearly that other forces (media coverage/word of mouth/advertising) do much of the groundwork for retail travel agents who deal with customers who to some degree have already decided and researched what they want. According to all 15 respondents in this study, the internet is widely used by all sorts of customers for education on destinations prior to the actual purchase process being initiated.

Lack of knowledge of Canada is also occasionally cited as an inhibitor to some first-time travellers who are fearful of having to drive through blizzards or on ice 12 months of the year. (In a country where snow is a rarity such fears are not to be underestimated.) Some older Australians who are leaving their native land for the first time at a senior age may also be apprehensive about driving on the other side of the road. Travellers who have previously been on an escorted tour are sometimes more willing to go the FIT route after an initial trip to Canada during which their perceptions and fears are resolved.

12.5 Attitudes to the Canadian Tourism Commission

While attitudes towards the CTC are undoubtedly favourable there has been some damage to the local presence in Australia because of staffing changes. The return of the previous CTC manager is welcomed after a period of dissatisfaction with the current manager (December, 2006). The interviewer did not press for specific details but the relief at the return of the previous manager is noticeable.

Relationships in Sydney are much more with the people at CTC rather than with the organization. The turnover of staff in Australia has been a negative but the situation is expected to be rectified.

The CTC is seen very much by the trade as a business partner, an organization set up and operating to help the industry get more Australians to Canada and keep the local operators profitable.

Not surprisingly there is a very positive attitude to any financial or logistical support CTC offers to the industry in Australia.

12.6 Summary

The Australian market for travel to Canada is buoyant and very sensitive to and susceptible to promotion. It is a market that has to be sold but it is a reasonably affluent and growing market. The sizeable appreciation of the Australian dollar versus the Canadian dollar in the last six months has to be a plus.

A critical issue is to determine which stakeholders are responsible for making the market grow. The recent past suggests that most of the initiative has come from wholesalers with valued backup from the CTC and the BC and Alberta regional offices.

The West dominates Australians' perceptions and images of Canada. This is only partly a function of geography. The West is the section of Canada that has been promoted and packaged in an attractive fashion.

The promotion of events or attractions in other parts of Canada may be worth consideration e.g., the Toronto Film Festival, Carnivale in Quebec, lazing in Muskoka, autumn in the East.

Canada as a country has a relatively low profile in the broader context of long haul (overseas) travel. A quick review of the departing flights daily on the Sydney Airport website gives a perspective of where Australians are going (see <http://www.sydneyairport.com.au/SACL/Flight+Info/International+Departures>).

Australians are enthusiastic long haul travellers and spend large amounts of money to see the world. When they are offered well packaged and attractive options for new travel experiences they are at the head of the queue. In addition, Canada offers new and rewarding experiences with minimal personal risk involved. The Australian travel industry finds dealing with Canada easy and the lack of language and cultural barriers is a real asset. From the Australian industry's perspective this is a market with a major upside and little or no downside.

12.6 Summary

Getting Air Canada more on board in the Australian marketplace would seem to be a major potential plus. Reasons for their treatment of this market need to be understood and addressed by the CTC. Recently announced non-stop service by Air Canada between Vancouver and Sydney planned for December, 2007 using new Boeing 777 aircraft will undoubtedly help to alleviate these concerns.

Getting the Eastern provinces more active in the Australian market is perhaps another possibility. The travellers are ready but the products are still to be developed to popularize the rest of Canada as a holiday destination as much as has been done in the West. The industry in Australia reports high satisfaction with Canada as a destination and considerable potential for second and third visits.

The Way Forward: Considerations

The Way Forward: Considerations

There are 6 key areas that the CTC should focus on to accelerate market growth.

1. Reposition the Canadian brand to address the core appeal of Canada to Australians.
2. Target high priority market segments whose needs can be addressed by the Canadian travel experience.
3. Develop a wider array of products and packages for each target segment.
4. Work with the travel trade with a focused strategy.
5. Target specific media opportunities.
6. Tailor the CTC website to address the needs of the target segments.

The Way Forward: Considerations

1. Reposition the Canadian brand to address the core appeal of Canada to Australians.

The vast majority of current and prospective travellers to Canada include the country as an integral part of a major journey to the Northern Hemisphere – typically including time in the U.S. and often Europe.

Only a small minority are travelling only to Canada (26% of recent visitors, 16% based on the ideal next trip).

Canada, then, should attempt to capture a larger share of Northern Hemisphere trips destined to the U.S. and/or Europe.

The positioning for Canada should clearly differentiate its product from that of the U.S. and Europe and sell the notion that, it is a must see inclusion.

The most compelling (and unique) appeal of Canada is its nature.

The best positioning theme for Canada in Australia is:

"Canada's nature and environment is a transforming experience for the soul. It can rejuvenate, inspire and emancipate."

Support for this positioning is that:

- Canada's green, lush, oxygen rich mountains parks and forests are in sharp contrast to their own natural environment – dryer, hotter, suffering from drought conditions.
- Australians get excited about being in that environment, whether observing or soft adventure focused. They claim it rejuvenates the soul.
- The U.S. and Europe do not provide the same experience.

The Way Forward: Considerations

While nature benefits should be the core positioning, there are plenty of other elements that can help form an emotional bond between Australia and Canada:

- Focus on rekindling an affinity for each other.
- Canada is loved for being part of the Commonwealth/Colony, just like Australia.
- Australians love that Canadians love Australians and accept them the way they are, unlike the U.S. and Europe.
- Australians appreciate that Canadians understand their sense of humour, more so than those in the U.S. and Europe.
- The relationship between Canada and Australians is “sibling”, and this can be leveraged to elevate emotional equity.

2. Target high priority market segments whose needs can be addressed by the Canadian travel experience.

The two primary target segments should be:

1. Nature Inspired

- 33% of the travel market, this group skews older (50+) and is attracted to Canada’s beautiful nature and the inspiration it provides.
- They also place a high importance on experiencing Canadian culture, less interest in soft adventure.

2. Outdoor Sports Seekers

- 17% of the travel market, this group skews younger (primarily 18 to 29) and is attracted to soft adventure.
- Skiing/snowboarding dominates but canoeing/kayaking, hiking and camping are highly appealing as well.

The Way Forward: Considerations

3. Develop a wider array of products and packages for each target segment.

Most Australian travellers are FIT – typically not on a package, but open to relevant packaging.

Canada needs to ensure that the correct product is available to each target segment – either packaged or available for purchase separately.

Key product elements for the FIT traveller include:

<u>Nature Inspired</u>	<u>Outdoor Sports Seekers</u>
<ul style="list-style-type: none"> • Low cost airfares • Mountain/lakeside resorts • Rail travel • Car rental • Mid priced hotels • Canada's natural icons • Experiencing Canadian culture (city focused) • Experiencing Canadian cuisine • French Canadian culture and cuisine • Historic sites • Across Canada 	<ul style="list-style-type: none"> • Low cost airfares • Mountain/ski resorts • Spa visits • Ski packages • Hiking opportunities • Canoeing/kayaking opportunities • Camping • Horseback riding • Rail travel • Car rental • Across Canada

The Way Forward: Considerations

4. Work with the travel trade with a focused strategy.

The trade currently focuses on group packages and clearly needs more FIT product.

Further, they need to be informed of the appeal of Canada to north bound travellers and the benefits of including Canada in the itinerary.

Canada can be positioned as a viable route to Europe.

5. Target specific media opportunities.

The non-commercial media can be extremely powerful in promoting a destination, more so than traditional advertising.

Every effort should be made to get the Canadian product into television shows and other public relations opportunities.

- “Getaway” in particular is a highly influential travel show
- “The Great Outdoors” was also mentioned, although less often

6. Tailor the CTC website to address the needs of the target segments.

The CTC website should ensure that it addresses the needs of FIT travellers wanting to review and ultimately purchase specific trip components that appeal to them – namely:

- Accommodation (resorts, mid-priced properties)
- Soft adventure experiences (e.g., skiing/snowboarding, hiking/canoeing/kayaking experiences, camping and horseback riding opportunities)
- Rail excursions
- Car rental
- Spa experiences
- Coastal cruises
- French Canada
- Intercontinental travel

Appendix

Australia Travel Survey

We are conducting a survey on international pleasure travel. The purpose of the survey is not to sell you anything, but to get your opinions on travel.

1) In which area do you currently reside? (Please select one)

- Melbourne ☐
- Other Victoria ☐
- Sydney ☐
- Other N.S.W. ☐
- Hobart ☐
- Other Tasmania ☐
- Perth ☐
- Other Western Australia ☐
- Adelaide ☐
- Other South Australia ☐
- Brisbane ☐
- Other Queensland ☐
- Canberra ☐
- None of the above ☐
- (Terminate) ☐

2) Are you...

- Male ☐ 50/50 Gender Split
- Female ☐

3a) In which of the following age categories do you belong?

- Under 18 ☐ END INTERVIEW
- 18-19 ☐
- 20-24 ☐
- 25-29 ☐
- 30-34 ☐
- 35-39 ☐
- 40-44 ☐
- 45-49 ☐
- 50-54 ☐
- 55-59 ☐
- 60-64 ☐
- 65-69 ☐
- 70-74 ☐
- 75 and over ☐

MINIMUM N=100 OF
AGED 60+

3b) Occupations are of interest to us in this survey. Do you or does anyone in your household work full time for any of the following:

- Market research ☐ TERMINATE
- Travel industry ☐ IF CHECKED
- None of the above ☐

The following questions that we are going to ask you concern pleasure trips. By that we mean pleasure trips outside of Australia, New Zealand and the South Pacific for 4 nights or longer. It includes all trips for pleasure or personal reasons including to visit friends and relatives as well as trips where you combined business with a pleasure trip. However, it excludes any trips that were for business purposes only or for study purposes only.

4) In the past three years, that is since February, 2004, how many times have you, yourself, taken a pleasure trip outside of Australia, New Zealand and the South Pacific for 4 nights or longer? Again, please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

- None ☐ 0
- 1 ☐ 1
- 2 ☐ 2
- 3 to 5 ☐ 3
- 6 to 9 ☐ 4
- 10 or more ☐ 5

5) In the next two years, that is before February, 2009, how likely is it that you will take a pleasure trip outside of Australia, New Zealand and the South Pacific for 4 nights or longer? Are you: (Select one only)

- Definitely going to take such a trip ☐
- Very likely to take such a trip ☐
- Somewhat likely to take such a trip ☐
- Not very likely to take such a trip ☐
- Not at all likely to take such a trip ☐

IF NONE, IN Q.4 AND IF SOMEWHAT, NOT VERY OR NOT AT ALL LIKELY
IN Q.5 END INTERVIEW

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- 6a) Thinking of future travel outside of Australia, New Zealand and the South Pacific, what countries would you be likely to visit on a pleasure trip for 4 nights or longer in the next two years? Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only. (PLEASE SELECT YOUR MOST LIKELY CHOICES WITH UP TO 5 COUNTRIES FROM THE LIST BELOW OR WRITE IN YOUR CHOICES IF NOT LISTED) (PN: List from 7 with codes 18-26 suppressed)

Orient/Asia	China	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>
	Japan	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>
	Philippines	<input type="checkbox"/>
	Russia	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>
	South Korea	<input type="checkbox"/>
	Sri Lanka	<input type="checkbox"/>
	Taiwan	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>
	India	<input type="checkbox"/>
	Indonesia (Bali, Borneo)	<input type="checkbox"/>
	Maldives	<input type="checkbox"/>
	Other Orient/Asia	<input type="checkbox"/>
Pacific	Hawaii	<input type="checkbox"/>
	Other North Pacific	<input type="checkbox"/>
Europe	Austria	<input type="checkbox"/>
	France	<input type="checkbox"/>
	Germany	<input type="checkbox"/>
	Italy	<input type="checkbox"/>
	Spain	<input type="checkbox"/>
	Portugal	<input type="checkbox"/>
	Holland	<input type="checkbox"/>
	Greece	<input type="checkbox"/>
	Switzerland	<input type="checkbox"/>
	United Kingdom	<input type="checkbox"/>
Americas	Other Europe	<input type="checkbox"/>
	Alaska	<input type="checkbox"/>
	Argentina	<input type="checkbox"/>
	Brazil	<input type="checkbox"/>
	Canada	<input type="checkbox"/>
	Caribbean	<input type="checkbox"/>
	Mexico	<input type="checkbox"/>
	US Mainland	<input type="checkbox"/>
	Cuba	<input type="checkbox"/>
	Other Americas	<input type="checkbox"/>
Middle East	Dubai	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>
	Iran	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>
Africa	Egypt	<input type="checkbox"/>
	Kenya	<input type="checkbox"/>
	Morocco	<input type="checkbox"/>
	Tanzania	<input type="checkbox"/>
	South Africa	<input type="checkbox"/>
	Other Africa	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	None	<input type="checkbox"/>

SKIP TO
Q.7

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- 6b) From the countries you selected please rank those countries starting with the one you would likely to visit first, then second, third and so on. (PROGRAMMING: SHOW Up to 5 DESTINATIONS SELECTED IN 6a)(If only one selected in Q6a skip to Q7)

		1 st	2 nd	3 rd	4 th	5 th
Orient/Asia	China	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Japan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Philippines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Russia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	South Korea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Sri Lanka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Taiwan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	India	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Indonesia (Bali, Borneo)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Maldives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pacific	Other Orient/Asia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Hawaii	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other North Pacific	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Europe	Austria	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	France	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Germany	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Italy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Spain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Portugal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Holland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Greece	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Switzerland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	United Kingdom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Europe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Americas	Alaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Argentina	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Brazil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Caribbean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	US Mainland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cuba	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Americas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle East	Dubai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Iran	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Africa	Egypt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Kenya	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Morocco	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Tanzania	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	South Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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- 7) (ASK THOSE WHO ANSWERED CODE 1 TO 5 IN Q.4, OTHERS SKIP TO Q.20)
(ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE
SAMPLE TERMINATE IF 0 IN Q.4)during the past 3 years which of these countries
or destinations outside Australia did you visit for pleasure and stayed for 4 nights or
longer, if any?

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- | | | | |
|-----------------------|-----------------------------|-----------------------------|-----------------------------|
| Orient/Asia | China | <input type="checkbox"/> 1 | |
| | Hong Kong | <input type="checkbox"/> 2 | |
| | Japan | <input type="checkbox"/> 3 | |
| | Malaysia | <input type="checkbox"/> 4 | |
| | Philippines | <input type="checkbox"/> 5 | |
| | Russia | <input type="checkbox"/> 6 | |
| | Singapore | <input type="checkbox"/> 7 | |
| | South Korea | <input type="checkbox"/> 8 | |
| | Sri Lanka | <input type="checkbox"/> 9 | |
| | Taiwan | <input type="checkbox"/> 10 | |
| | Thailand | <input type="checkbox"/> 11 | |
| | Vietnam | <input type="checkbox"/> 12 | |
| | India | <input type="checkbox"/> 13 | |
| | Indonesia (Bali, Borneo) | <input type="checkbox"/> 14 | |
| Pacific | Maldives | <input type="checkbox"/> 15 | |
| | Other Orient/Asia | <input type="checkbox"/> 16 | |
| | Hawaii | <input type="checkbox"/> 17 | |
| | New Zealand | <input type="checkbox"/> 18 | |
| | Fiji | <input type="checkbox"/> 19 | |
| | New Caledonia | <input type="checkbox"/> 20 | |
| | Tonga | <input type="checkbox"/> 21 | |
| | Tahiti | <input type="checkbox"/> 22 | |
| | Cook Islands | <input type="checkbox"/> 23 | |
| | New Guinea | <input type="checkbox"/> 24 | |
| Guam | <input type="checkbox"/> 25 | | |
| Other South Pacific | <input type="checkbox"/> 26 | | |
| Europe | Other North Pacific | <input type="checkbox"/> 27 | |
| | Austria | <input type="checkbox"/> 28 | |
| | France | <input type="checkbox"/> 29 | |
| | Germany | <input type="checkbox"/> 30 | |
| | Italy | <input type="checkbox"/> 31 | |
| | Spain | <input type="checkbox"/> 32 | |
| | Portugal | <input type="checkbox"/> 33 | |
| | Holland | <input type="checkbox"/> 34 | |
| | Greece | <input type="checkbox"/> 35 | |
| | Switzerland | <input type="checkbox"/> 36 | |
| Americas | United Kingdom | <input type="checkbox"/> 37 | |
| | Other Europe | <input type="checkbox"/> 38 | |
| | Alaska | <input type="checkbox"/> 39 | |
| | Argentina | <input type="checkbox"/> 40 | |
| | Brazil | <input type="checkbox"/> 41 | |
| | Canada | <input type="checkbox"/> 42 | |
| | Caribbean | <input type="checkbox"/> 43 | |
| | Mexico | <input type="checkbox"/> 44 | |
| | US Mainland | <input type="checkbox"/> 45 | |
| | Cuba | <input type="checkbox"/> 46 | |
| Middle East | Other Americas | <input type="checkbox"/> 47 | |
| | Dubai | <input type="checkbox"/> 48 | |
| | Turkey | <input type="checkbox"/> 49 | |
| | Iran | <input type="checkbox"/> 50 | |
| | United Arab Emirates | <input type="checkbox"/> 51 | |
| | Other Middle East | <input type="checkbox"/> 52 | |
| | Africa | Egypt | <input type="checkbox"/> 53 |
| | | Kenya | <input type="checkbox"/> 54 |
| | | Morocco | <input type="checkbox"/> 55 |
| | | Tanzania | <input type="checkbox"/> 56 |
| South Africa | | <input type="checkbox"/> 57 | |
| Other Africa | | <input type="checkbox"/> 58 | |
| Other (specify) _____ | | <input type="checkbox"/> 60 | |
| Other (specify) _____ | | <input type="checkbox"/> 61 | |
| Other (specify) _____ | | <input type="checkbox"/> 62 | |
| None | | <input type="checkbox"/> | |

[PN: MAKE SURE AT LEAST ONE COUNTRY IS CHECKED. IF NONE, TERMINATE]
[PN: IF CHECKED ANY OF THE BOXED DESTINATIONS (CODE 18-26), IF AT LEAST
ONE COUNTRY OUTSIDE OF CODE 18-26 IS NOT CHECKED TERMINATE.]

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- (ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE
TERMINATE IF Canada is not selected IN Q.7) (Quota N=400 for augment is based
on Canada selected in Q.7)

(PN: Augment Quota - 400 in total must select Canada in Q7 (includes those from the
main sample (For example if we obtain 100 from the main sample only need 300
- flag those from the main sample vs. augment)

- 8a.) Thinking about your most recent pleasure trip of four nights or longer to somewhere
outside of Australia, New Zealand and the South Pacific, which of these places did
you visit on that trip? (PN: List from 7 with codes 18-26 suppressed)

- | | | | |
|-----------------------|--------------------------|--------------------------|--------------------------|
| Orient/Asia | China | <input type="checkbox"/> | |
| | Hong Kong | <input type="checkbox"/> | |
| | Japan | <input type="checkbox"/> | |
| | Malaysia | <input type="checkbox"/> | |
| | Philippines | <input type="checkbox"/> | |
| | Russia | <input type="checkbox"/> | |
| | Singapore | <input type="checkbox"/> | |
| | South Korea | <input type="checkbox"/> | |
| | Sri Lanka | <input type="checkbox"/> | |
| | Taiwan | <input type="checkbox"/> | |
| | Thailand | <input type="checkbox"/> | |
| | Vietnam | <input type="checkbox"/> | |
| | India | <input type="checkbox"/> | |
| | Indonesia (Bali, Borneo) | <input type="checkbox"/> | |
| Pacific | Maldives | <input type="checkbox"/> | |
| | Other Orient/Asia | <input type="checkbox"/> | |
| | Hawaii | <input type="checkbox"/> | |
| | Europe | Other North Pacific | <input type="checkbox"/> |
| | | Austria | <input type="checkbox"/> |
| | | France | <input type="checkbox"/> |
| | | Germany | <input type="checkbox"/> |
| | | Italy | <input type="checkbox"/> |
| | | Spain | <input type="checkbox"/> |
| | | Portugal | <input type="checkbox"/> |
| Holland | | <input type="checkbox"/> | |
| Greece | | <input type="checkbox"/> | |
| Switzerland | | <input type="checkbox"/> | |
| Americas | United Kingdom | <input type="checkbox"/> | |
| | Other Europe | <input type="checkbox"/> | |
| | Alaska | <input type="checkbox"/> | |
| | Argentina | <input type="checkbox"/> | |
| | Brazil | <input type="checkbox"/> | |
| | Canada | <input type="checkbox"/> | |
| | Caribbean | <input type="checkbox"/> | |
| | Mexico | <input type="checkbox"/> | |
| | US Mainland | <input type="checkbox"/> | |
| | Cuba | <input type="checkbox"/> | |
| Middle East | Other Americas | <input type="checkbox"/> | |
| | Dubai | <input type="checkbox"/> | |
| | Turkey | <input type="checkbox"/> | |
| | Iran | <input type="checkbox"/> | |
| | United Arab Emirates | <input type="checkbox"/> | |
| | Other Middle East | <input type="checkbox"/> | |
| | Africa | Egypt | <input type="checkbox"/> |
| | | Kenya | <input type="checkbox"/> |
| | | Morocco | <input type="checkbox"/> |
| | | Tanzania | <input type="checkbox"/> |
| South Africa | | <input type="checkbox"/> | |
| Other Africa | | <input type="checkbox"/> | |
| Other (specify) _____ | | <input type="checkbox"/> | |
| Other (specify) _____ | | <input type="checkbox"/> | |
| Other (specify) _____ | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |

[PN: MAKE SURE AT LEAST ONE COUNTRY IS CHECKED. IF NONE, TERMINATE]
(PN: Show the whole list of countries for Q.8a. (PN: multiple destinations allowed. No limits)

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8b.) (IF CANADA IN Q. 8a) ASK) While you were in Canada on that trip, which of the following places did you visit, if any?

	YES	NO
British Columbia (includes Vancouver, Victoria and Whistler)	<input type="checkbox"/>	<input type="checkbox"/>
Alberta (includes Calgary)	<input type="checkbox"/>	<input type="checkbox"/>
Saskatchewan (province)	<input type="checkbox"/>	<input type="checkbox"/>
Manitoba (province)	<input type="checkbox"/>	<input type="checkbox"/>
Ontario (includes Toronto and Niagara Falls)	<input type="checkbox"/>	<input type="checkbox"/>
Quebec (includes Montreal and Quebec City)	<input type="checkbox"/>	<input type="checkbox"/>
Atlantic Provinces (Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland)	<input type="checkbox"/>	<input type="checkbox"/>
Yukon (province)	<input type="checkbox"/>	<input type="checkbox"/>
Northwest Territories/Nunavut	<input type="checkbox"/>	<input type="checkbox"/>

9a) What were your reasons for travelling to (Q.8a DESTINATION -[PN: show multiple destinations. No limits])?

(CHECK AS MANY AS APPLY).
9b) Which of those was your main reason for travel? (please check one only) [PN: SHOW THOSE CHECKED IN Q.9A]

	9a)	9b)
Sightseeing – mainly city	<input type="checkbox"/>	<input type="checkbox"/>
Sightseeing – mainly nature	<input type="checkbox"/>	<input type="checkbox"/>
To relax, unwind and decompress in a large country	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor adventure/recreational activities	<input type="checkbox"/>	<input type="checkbox"/>
To see if it is a good place to immigrate to	<input type="checkbox"/>	<input type="checkbox"/>
A visit to see friends and relatives	<input type="checkbox"/>	<input type="checkbox"/>
A visit to see friends and relatives combined with additional leisure travel away from friends and relatives	<input type="checkbox"/>	<input type="checkbox"/>
A trip that combined business with additional leisure travel	<input type="checkbox"/>	<input type="checkbox"/>
To experience different cultures and ways of life	<input type="checkbox"/>	<input type="checkbox"/>
To visit historical sites and important places in history	<input type="checkbox"/>	<input type="checkbox"/>
To experience unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>
To visit a popular, trendy place	<input type="checkbox"/>	<input type="checkbox"/>
To participate in skiing/snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
To take a coastal cruise	<input type="checkbox"/>	<input type="checkbox"/>
Travelling on a working visa	<input type="checkbox"/>	<input type="checkbox"/>
Other reasons	<input type="checkbox"/>	<input type="checkbox"/>

10a) On that trip to (Q. 8a) DESTINATION -[PN: show multiple destinations. No limits], how many nights, in total, were you away from home? [ACCEPT RANGE 4-999]
_____ nights

10b) (IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in Canada? [ACCEPT RANGE 1-999. EQUAL TO OR LESS THAN Q.10A]
_____ nights

10c) (IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in the U.S. Mainland on that trip, if any? [ACCEPT RANGE 1-999. EQUAL TO OR LESS THAN Q.10A]
_____ nights NONE ☐

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[PN: PLEASE MAKE SURE THE SUM OF Q.10b and Q.10c IS EQUAL TO OR LESS THAN THE NUMBER IN Q.10a]

[PN: AUTO PUNCH NONE AT Q.10C IF ANSWER AT Q.10A EQUAL TO ANSWER AT Q.10B]

10d) (IF CANADA IN Q. 8a) ASK (ONLY LIST PLACES VISITED IN Q. 8b) How many nights did you spend in each area on that trip? [ACCEPT RANGE 0-999]

	NIGHTS
British Columbia (includes Vancouver, Victoria and Whistler)	_____
Alberta (includes Calgary)	_____
Saskatchewan (province)	_____
Manitoba (province)	_____
Ontario (includes Toronto and Niagara Falls)	_____
Quebec (includes Montreal and Quebec City)	_____
Atlantic Provinces (Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland)	_____
Yukon (province)	_____
Northwest Territories/Nunavut	_____

TOTAL MUST EQUAL ANSWER TO Q.10b)

11. And when did you take that trip to (DESTINATION IN Q.8a-[PN: show multiple destinations. No limits])? Please tell me the year and month you started that trip?

Year	[ACCEPT 2003 TO CURRENT YEAR]
Month	
January	<input type="checkbox"/>
February	<input type="checkbox"/>
March	<input type="checkbox"/>
April	<input type="checkbox"/>
May	<input type="checkbox"/>
June	<input type="checkbox"/>
July	<input type="checkbox"/>
August	<input type="checkbox"/>
September	<input type="checkbox"/>
October	<input type="checkbox"/>
November	<input type="checkbox"/>
December	<input type="checkbox"/>

MUST
CHECK
ONE

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12. With whom did you travel on that trip to (DESTINATION IN Q.8a- PN: show multiple destinations. No limits) ?
(CHECK AS MANY AS APPLY)

Travelled alone	<input type="checkbox"/> SKIP TO Q. 14a)
Wife/husband/girlfriend/boyfriend	<input type="checkbox"/>
Child(ren)	<input type="checkbox"/>
Father/mother	<input type="checkbox"/>
Other relatives	<input type="checkbox"/>
Friends	<input type="checkbox"/>
Organized group/club/etc	<input type="checkbox"/>
Business associates/colleagues	<input type="checkbox"/>
Other (specify) _____	

- 13a) Including yourself, how many people were there in your immediate travel party?
Please be sure to record your immediate travel party, not people that were part of a larger group.

_____ People [2-99]

- 13b) And how many of those were under 18 years of age, if any?

_____ People [0-99]

**PN: SHOULD BE
LESS THAN Q.13A**

- 14a) Were any of the following a source of inspiration for you to decide to travel to PN: show multiple destinations. No limits) ?
(DESTINATION IN Q.8A). (PLEASE SELECT AS MANY AS APPLY)

- 14b) Which of those was the main source of inspiration for choosing that destination?
(PLEASE SELECT ONE ONLY) [PN: SHOW THOSE CHECKED IN Q.14A]

	14a	14b
Television travel show	<input type="checkbox"/>	<input type="checkbox"/>
Other television show	<input type="checkbox"/>	<input type="checkbox"/>
Celebrity travelled there	<input type="checkbox"/>	<input type="checkbox"/>
Story in a magazine or newspaper	<input type="checkbox"/>	<input type="checkbox"/>
Friend or relative	<input type="checkbox"/>	<input type="checkbox"/>
The Internet	<input type="checkbox"/>	<input type="checkbox"/>
Travel agent	<input type="checkbox"/>	<input type="checkbox"/>
Advertising (e.g., ads about travelling to other countries)	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
NONE	<input type="checkbox"/>	<input type="checkbox"/>

- 14c) (IF TELEVISION TRAVEL SHOWS IN Q.14a) ASK You mentioned "television travel shows" as a source of inspiration, which television travel shows in particular were a source of inspiration?

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- 14d) (IF OTHER TELEVISION SHOWS IN Q.14a) ASK You mentioned "other television shows" as a source of inspiration, which television shows in particular were a source of inspiration?

- 14e) (IF INTERNET IN Q. 14a) ASK You mentioned that you use the Internet as a source of inspiration. Did you use any of the following sites?

National tourist offices	<input type="checkbox"/>
Other government tourist organizations (e.g., regional or local government tourist offices)	<input type="checkbox"/>
All private sector sites (e.g., hotels, airlines) other than travel agencies	<input type="checkbox"/>
Online travel agencies	<input type="checkbox"/>
Travel blogs (please specify which sites)	<input type="checkbox"/>

Other sites (please specify which sites)	<input type="checkbox"/>

- 15a) How long before your trip did you definitely decide to go on that trip to (DESTINATION IN Q.8a -(PN: show multiple destinations. No limits)) ? RECORD NUMBER.

_____ Days OR _____ Weeks OR _____ Months OR _____ Years
[1-365] [1-99] [1-99] [1-99]

- 15b) And how long before your trip did you actually book it? (PN: Answer in Q15b – should be less than or equal to Q15a)

_____ Days OR _____ Weeks OR _____ Months OR _____ Years
[1-365] [1-99] [1-99] [1-99]

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15c) How did you book that trip? Did you: [select as many as apply]

- | | |
|--|-----------------------------|
| Contact an airline directly via their website | <input type="checkbox"/> 1 |
| Contact an airline directly via telephone, mail or in person | <input type="checkbox"/> 2 |
| Contact a hotel directly via their website | <input type="checkbox"/> 3 |
| Contact a hotel directly via telephone | <input type="checkbox"/> 4 |
| Book through a travel agent or package provider in person | <input type="checkbox"/> 5 |
| Book through a travel agent or package provider via phone | <input type="checkbox"/> 6 |
| Book through a travel agent or package provider online | <input type="checkbox"/> 7 |
| Book through any other online travel supplier | <input type="checkbox"/> 8 |
| Book through a website of a country/state/province/or city tourism authority | <input type="checkbox"/> 9 |
| Other | <input type="checkbox"/> 10 |

16. On that trip, did you travel with your immediate party only or as part of a larger group tour?

- Immediate party only/self only ☐
- Part of a larger group tour ☐ SKIP TO Q.18

17a) On that trip, did you buy a package that included airfare and accommodation?

- Yes ☐
- No ☐ SKIP TO Q.17c

17b) What else was included in the package, if any?

- | | |
|--|--------------------------|
| Car rental | <input type="checkbox"/> |
| Airport transfer | <input type="checkbox"/> |
| Guided tours at destination | <input type="checkbox"/> |
| Meals | <input type="checkbox"/> |
| Admission to local attractions | <input type="checkbox"/> |
| Outdoor activities | <input type="checkbox"/> |
| Ground transportation between overnight destinations | <input type="checkbox"/> |
| Other | <input type="checkbox"/> |
| Nothing else included | <input type="checkbox"/> |

17c) (IF NO AT Q.17A OR IF CAR RENTAL NOT CHECKED IN Q.17B, ASK Q.17C. OTHERS SKIP TO Q.18) Did you rent a car on that trip?

- Yes ☐
- No ☐

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18. In what type of accommodation did you stay? (Please check all that apply)

- | | |
|---------------------------------------|--------------------------|
| Luxury hotel | <input type="checkbox"/> |
| Mid-priced hotel/motel | <input type="checkbox"/> |
| Budget hotel/motel | <input type="checkbox"/> |
| Country inn/bed and breakfast | <input type="checkbox"/> |
| Apartment hotel/condo/timeshare | <input type="checkbox"/> |
| Resort (e.g., beach, ski) | <input type="checkbox"/> |
| Rented cottage | <input type="checkbox"/> |
| Lodge (e.g., hunting, fishing) | <input type="checkbox"/> |
| Campground | <input type="checkbox"/> |
| Trailer/Motor home/van | <input type="checkbox"/> |
| Youth hostel/university accommodation | <input type="checkbox"/> |
| Home of friend or relative | <input type="checkbox"/> |
| Cruise ship | <input type="checkbox"/> |
| Other | <input type="checkbox"/> |

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19a) Which, if any, of the following activities did you participate in while on that trip to (DESTINATION IN Q. 8a - (PN: show multiple destinations. No limits)). Please check all that apply.

RANDOMIZE STATEMENTS

	Yes	No
Seeing old architecture	<input type="checkbox"/>	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>	<input type="checkbox"/>
Visiting world heritage sites	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>	<input type="checkbox"/>
Visiting friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Viewing majestic mountains	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful rivers or waterfalls	<input type="checkbox"/>	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful beaches and coastlines	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Camping	<input type="checkbox"/>	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Skating or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>	<input type="checkbox"/>
Travelling by train	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Staying at a luxury resort	<input type="checkbox"/>	<input type="checkbox"/>
Taking a garden or flower tour	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in their natural environment	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums and art galleries	<input type="checkbox"/>	<input type="checkbox"/>
Spending time as a family	<input type="checkbox"/>	<input type="checkbox"/>
Visiting children's theme parks	<input type="checkbox"/>	<input type="checkbox"/>
Extreme sports	<input type="checkbox"/>	<input type="checkbox"/>
Driving/touring	<input type="checkbox"/>	<input type="checkbox"/>
Seeing modern cityscapes	<input type="checkbox"/>	<input type="checkbox"/>
Taking a wine tour	<input type="checkbox"/>	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>	<input type="checkbox"/>
Attending a sporting event	<input type="checkbox"/>	<input type="checkbox"/>
Fine dining	<input type="checkbox"/>	<input type="checkbox"/>
Staying on a farm (agri-tourism)	<input type="checkbox"/>	<input type="checkbox"/>

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19b) What was the total cost of that trip to (DESTINATION IN Q. 8a - PN: show multiple destinations. No limits), for you and your immediate travel party, including airfare and all other costs? [ACCEPT ONE ANSWER ONLY]

Under \$1,000	<input type="checkbox"/>
\$1,000 - \$1,999	<input type="checkbox"/>
\$2,000 - \$3,999	<input type="checkbox"/>
\$4,000 - \$5,999	<input type="checkbox"/>
\$6,000 - \$7,999	<input type="checkbox"/>
\$8,000 - \$9,999	<input type="checkbox"/>
\$10,000 - \$11,999	<input type="checkbox"/>
\$12,000 - \$13,999	<input type="checkbox"/>
\$14,000 - \$15,999	<input type="checkbox"/>
\$16,000 - \$17,999	<input type="checkbox"/>
\$18,000 - \$19,999	<input type="checkbox"/>
\$20,000+	<input type="checkbox"/>

19c) Overall, how would you rate that trip on value for money. Would you say it was:

Excellent value for money	<input type="checkbox"/>
Very good value for money	<input type="checkbox"/>
Good value for money	<input type="checkbox"/>
Fair value for money	<input type="checkbox"/>
Poor value for money	<input type="checkbox"/>

[PN: IF CANADA IS NOT MENTIONED IN Q.8A BUT IS MENTIONED IN Q.7, ASK Q.8A TO 19 FOR LAST TRIP TO CANADA. REPLACE Q.8A WITH: "You mentioned that you travelled to Canada in the past 3 years. Thinking about your last trip to Canada, which of these places did you visit on that trip? Please check Canada as well."]

PN: THE MAXIMUM TIMES THE RESPONDENT IS ASKED IS TWO TIMES. IF TWICE, ONCE REGARDING MOST RECENT TRIP, THE OTHER TIME REGARDING THE TRIP TO CANADA (PN: please label them as Q.8a-1 to Q.19c-1)

Forcing answer Canada in Q.8a-1 if Q7 has Canada (last trip to Canada section)

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ASK EVERYONE

20. Please imagine that you are taking an overseas pleasure trip outside of Australia, New Zealand and the South Pacific for 4 nights or longer. For each statement on this page check one box to show how important that reason is to you when considering such a trip.

	Very Important	Somewhat Important	Not very Important	Not at all Important
Getting away from the demands of home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a clean, healthy environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying a relaxing atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being inspired by beauty and nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling a sense of freedom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coming home with exciting travel stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a place my friends would love to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing another British colony	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rediscovering myself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surrounded by beautiful, unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying in accommodations unique to that country (e.g., castle, log cabin, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To experience aboriginal heritage and attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing places important in history	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing as much as possible in the time available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing first hand what I learned in school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling not in a group to provide more flexibility and independence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Great flight accessibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roughing it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in active outdoor sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying alpine (downhill) skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being daring and adventuresome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being together as a family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good value air fares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting away from the summer heat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling secure and safe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local people are friendly and welcoming toward Australians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling a wide, spacious outdoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a different country's lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to visit a place I have not been to before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to increase my knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to experience unique places	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to try new foods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extreme sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photography tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eco tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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21. Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, or anything else that you have seen, heard or read.

RANDOMIZE ORDER OF DESTINATION LIST

	United States	Canada	Europe	South East Asia	Not Applicable
Getting away from the demands of home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a clean, healthy environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying a relaxing atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being inspired by beauty and nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling a sense of freedom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coming home with exciting travel stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a place my friends would love to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing another British colony	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rediscovering myself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surrounded by beautiful, unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying in accommodations unique to that country (e.g., castle, log cabin, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To experience aboriginal heritage and attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing places important in history	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing as much as possible in the time available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing first hand what I learned in school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling not in a group to provide more flexibility and independence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Great flight accessibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roughing it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in active outdoor sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying alpine (downhill) skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being daring and adventuresome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being together as a family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good value air fares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting away from the summer heat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling secure and safe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local people are friendly and welcoming toward Australians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling a wide, spacious outdoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a different country's lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to visit a place I have not been to before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to increase my knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to experience unique places	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to try new foods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extreme sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photography tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eco tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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- 22) How interested are you in visiting South East Asia, Europe, US and Canada in the next two years? (Please select one only)

	South East Asia	Europe	U.S.A.	Canada
Very Interested	<input type="checkbox"/> 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat Interested	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Very Interested	<input type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all Interested	<input type="checkbox"/> 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(PN: PROGRAMMING: FOR NEXT QUESTION SHOW COUNTRIES WITH CODES 4 OR 3. IF CODES 2 OR 1 FOR ALL SKIP TO Q.25)

- 23) How likely are you to visit (SHOW COUNTRIES WITH CODES 4 OR 3 IN Q.22) in the next twelve months? (Please select one only)

	South East Asia	Europe	U.S.A.	Canada
Definitely Will Visit	<input type="checkbox"/> 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Likely	<input type="checkbox"/> 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat Likely	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Very Likely	<input type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all Likely	<input type="checkbox"/> 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely Will Not Visit	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(IF CODES 2 OR 1 FOR CANADA IN Q. 22 SKIP TO Q.25)

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- 24) Thinking about your next trip to Canada, if you were to go, describe your ideal trip below:

Season	January – March	<input type="checkbox"/>
	April – June	<input type="checkbox"/>
	July – September	<input type="checkbox"/>
	October – December	<input type="checkbox"/>
Type of Tour	Group tour	<input type="checkbox"/>
	Non-group (immediate party only)	<input type="checkbox"/>
(IF GROUP TOUR) Would you prefer:	All days organized with the group, or	<input type="checkbox"/>
	Many free days on your own	<input type="checkbox"/>
(IF NON-GROUP) Would you:	Buy air, accommodation, etc. as part of a package, or	<input type="checkbox"/>
	Buy air, accommodation, and other components separately	<input type="checkbox"/>
Would Also Visit Overnight or Longer (ALLOW MORE THAN ONE ANSWER)	U.S.	<input type="checkbox"/>
	Europe	<input type="checkbox"/>
	Other countries	<input type="checkbox"/>
	Canada only	<input type="checkbox"/>
Region	Travel right across Canada to see all the main attractions, or	<input type="checkbox"/>
	Focus on Western Canada only, or	<input type="checkbox"/>
	Focus on Eastern Canada only	<input type="checkbox"/>
	Other	<input type="checkbox"/>
Preferred type of accommodation for one or more nights on trip (MAXIMUM 3):	Mountain resort	<input type="checkbox"/>
	Seaside resort	<input type="checkbox"/>
	Lakeside resort	<input type="checkbox"/>
	Ski resort	<input type="checkbox"/>
	On a farm	<input type="checkbox"/>
	Horse ranch	<input type="checkbox"/>
	Coastal cruise ship	<input type="checkbox"/>
	Canadian spa	<input type="checkbox"/>
	Authentic log cabin or lodge	<input type="checkbox"/>
	Campground	<input type="checkbox"/>
	Trailer/Motor home/van	<input type="checkbox"/>
	Rented cottage	<input type="checkbox"/>
	Country inn/bed and breakfast	<input type="checkbox"/>
	Apartment hotel/condo/timeshare	<input type="checkbox"/>
	Youth hostel/university accommodation	<input type="checkbox"/>
	Luxury hotel	<input type="checkbox"/>
	Mid-priced hotel/motel	<input type="checkbox"/>
	Budget hotel	<input type="checkbox"/>
	Home of friends or relatives	<input type="checkbox"/>
	Other	<input type="checkbox"/>
Participate in any of the following activities	Yes	No
	Snow skiing/snowboarding	<input type="checkbox"/>
	Hiking/trekking	<input type="checkbox"/>
	Salmon fishing	<input type="checkbox"/>
	Golfing	<input type="checkbox"/>
	Horseback riding	<input type="checkbox"/>
	Go canoeing or kayaking	<input type="checkbox"/>
	Visiting the home of a local family	<input type="checkbox"/>
	Going to live theatre	<input type="checkbox"/>
	Visiting museums art galleries	<input type="checkbox"/>
	Visiting historical sites	<input type="checkbox"/>
	Experiencing French Canadian culture/ cuisine	<input type="checkbox"/>
	Participate in an activity related to my hobbies	<input type="checkbox"/>
	Visit a garden exhibition or flower show	<input type="checkbox"/>
	Viewing autumn leaves	<input type="checkbox"/>
	Viewing aurora	<input type="checkbox"/>
	Going camping	<input type="checkbox"/>
	See Polar Bears	<input type="checkbox"/>
	Family/children's activities	<input type="checkbox"/>
	Eco-travel	<input type="checkbox"/>
	See/experience the Rockies/mountains	<input type="checkbox"/>
	Wild animals in their environment	<input type="checkbox"/>
	Feeling the purity and freshness of untouched nature	<input type="checkbox"/>
	Visiting a spa	<input type="checkbox"/>
	Alaska cruise	<input type="checkbox"/>

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Culinary experiences (fine dining, winery tours)	<input type="checkbox"/>	<input type="checkbox"/>
Staying on a farm (agri-tourism)	<input type="checkbox"/>	<input type="checkbox"/>
Attending a sporting event	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Other activities (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
Travel in Canada between centres by any of the following:		
Air	<input type="checkbox"/>	<input type="checkbox"/>
Rental car	<input type="checkbox"/>	<input type="checkbox"/>
Motor coach	<input type="checkbox"/>	<input type="checkbox"/>
Motor home/camper	<input type="checkbox"/>	<input type="checkbox"/>
Rail	<input type="checkbox"/>	<input type="checkbox"/>
Private car	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____		
Duration in Canada _____ nights [1 to 999]		

(IF CODES 5, 4 OR 3 FOR CANADA IN Q, Z3 SKIP TO DEMOGRAPHICS)

- 25) Listed below are several potential barriers that could affect your interest in taking a pleasure trip to Canada in the near future. Please indicate for each whether, for you personally, it is a major barrier, a minor barrier, or not a barrier at all. (PN: randomize list within each block/section for Cost Issues, Safety Issues and Canada Related Issues—show headings)

	Major Barrier	Minor Barrier	Not A Barrier
Cost Issues			
High cost of packaged tours to Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High cost of air transportation to Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High cost of hotels within Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too expensive to travel as a family with kids	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive to travel within Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unfavorable exchange rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall trip would be too expensive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety Issues			
Safety concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk of terrorism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uncomfortable with travel to Canada because of close proximity to U.S.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada Related Issues			
Not a popular destination today	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country is too vast to see on one trip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are other more interesting/exotic places to go	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nothing special or unique about Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada is not exciting/too boring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor weather	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Been there before. No need to go back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do not know enough about Canada/too unfamiliar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do not have friends or relatives in Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not too much to do beyond seeing big nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too far to travel/flight to Canada is too long	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No major tourist attractions there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not enough to see and do in Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prefer to travel within Asia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Many attractions/sites too far apart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friends have been there and were not satisfied	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language difficulties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor shopping opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor quality accommodation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unfriendly people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too crowded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Not enough for kids to do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Issues (DO NOT RANDOMIZE LIST)			
Not enough flights to Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bad time for me financially	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too busy at work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too busy with kids	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not enough money available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelled enough already	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too much economic uncertainty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Old age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other barriers (specify) _____			

(PN: PROGRAMMING: ASK ALL RESPONDENTS)

DEMOGRAPHICS:

(PN: INTRO:) So that we can tabulate your responses, we would like to ask you some questions that would be used for statistical purposes only.

- 26) Do you have any close friends or relatives living in Canada at the present time? (Please select one)
- Yes..... ☐
- No..... ☐
- Don't know..... ☐

- 27) Including yourself, how many people are there in your household? (Please select one)

1 person..... 1

2-3 people..... 2

4-5 people..... 3

6 or more people..... 4

(PN: PROGRAMMING: IF CODE 1 SKIP TO Q.29)

- 28) How many are less than 18 years of age? (Please select one)

1 person..... 1

2 people..... 2

3 people..... 3

4 people..... 4

5 people..... 5

6 or more people..... 6

None..... 7

- 29) What is your marital status? (Please select one)

Married/Common law/De-facto or living with a partner..... ☐

Single..... ☐

Divorced / separated..... ☐

Widow / widower..... ☐

Prefer not to answer..... ☐

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30) Which of the following categories best describes your occupation? (Please select one)

Student	1
White collar worker	2
Blue collar worker	3
Manager	4
Professional	5
Farm owner	6
Skilled workers	7
Semi/unskilled workers	8
Self-employed	9
Housewife, not working outside the home	10
Retired	11
Part timer	12
Don't work	13
Looking for Full time work	14
Looking for Part time work	15
Other	16
Prefer not to answer	99

31) What is the highest level of education that you have completed? Please choose one answer that applies.

Primary school	<input type="checkbox"/>
Some Secondary/Technical school	<input type="checkbox"/>
Intermediate/Form 4/Year 10	<input type="checkbox"/>
5 th Form/leaving/Year 11	<input type="checkbox"/>
Finished Tech./Matric/HSC/Year 12	<input type="checkbox"/>
Some/Now at University	<input type="checkbox"/>
Have Diploma or Degree	<input type="checkbox"/>
Prefer not to answer	<input type="checkbox"/>

32) Which of the following categories best describes your gross annual household income before taxes in 2006? Please include all wages, salaries, pensions and income from other sources. Please choose one answer that applies.

Less than \$15,000	<input type="checkbox"/>
\$15,000 - \$24,999	<input type="checkbox"/>
\$25,000 - \$34,999	<input type="checkbox"/>
\$35,000 - \$49,999	<input type="checkbox"/>
\$50,000 - \$74,999	<input type="checkbox"/>
\$75,000 - \$99,999	<input type="checkbox"/>
\$100,000 - \$149,999	<input type="checkbox"/>
\$150,000 - \$199,999	<input type="checkbox"/>
\$200,000 +	<input type="checkbox"/>
Prefer not to answer	<input type="checkbox"/>

THANK YOU



Australia Travel Discussion Guide Patterns and Potential Demand

1. Background and Introduction (10 min)

In this section we will be warming up the participants, letting them get to know each other and learn about any specific hobbies, interests or clubs they belong to. It is important to understand their "spare time" activities and interests so that we can get some learning for potential "niche" travel packages.

- Please refer to the introductory sheet attached.
- Explain room set-up, confidentiality, explain expressing their own opinions, explain roles and objectives.
- Establish respondents as authorities.

Background on Respondents

- Have participants introduce themselves.
 - Name.
 - Type of work, if they work outside of the home.
 - Hobbies and interests or clubs that you belong to (for example: cooking, skiing, general outdoor activities, gardening, art, etc.).
 - Do you pick travel destinations based on any of your interests?
 - If so, what have you done, where have you gone?

2. Past and Future Holiday Travel Plans (15 min)

In this section the first objective is to gather and record the purpose of key destinations that participants have gone to in the past and key destinations planned for the future.

The second objective is to really understand any travel patterns that exist. These patterns could relate to seasonal, religious holiday or other cultural issues -- (for example: certain times of the year there are beach vacations; other times long-haul out of the country site seeing; certain times of the year heavy VFR etc.).

Moderator Instruction:

Have up on the wall several sheets of paper from an easel. Keep past trips separate from future trips.

Ask each participant to go through their list, past trips first and then future trip/s:

Ask for:

- Destination
- Time of year, and
- Purpose
- Assess from the group if it is generally a high, medium or low interest destination
- Probe/observe if Canada is combined with other countries like: U.S. or Europe.

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

Stand back and look at the easel papers and have the group help determine if any particular travel patterns exist (for example: seasonal vacations, VFR, in-country vs. out of country, etc.).

- I would like you to take a look at these sheets of travel logs we have created and tell me if you can identify or see any kinds of patterns. (For example: certain types of travel depending on the year or, certain places that are popular depending on the time of year, etc.).

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- Determine if:
 - Some patterns exist and why. (Again, Canada or combination)
 - Some destinations are becoming more or less popular and why.
 - Interests in travel are changing, in other words peoples' interests in the type of holiday/vacation they take have changed (example: more sun or mini breaks).
 - New types of packages or offerings have emerged.

3. Understand and Clarify Each "Key" Destination's Reason for having either Greater or Lesser Interest (20 min)

The main objective of this section is to understand on several levels and layers the reasons/triggers behind each "key" destination in attracting more or fewer vacationers.

(Key destinations include: China, Hong Kong, Middle East, Asia (Thailand, Japan), Canada, America, Europe, Italy and U.K.)

Start with the countries within the "key" set that are of high interest to the group.

- Several of you say that you are interested in vacationing to country X.
- Review questions below:

Overall Image:	When you think of <u>country X</u> what is your overall impression of it? What images does it conjure up? Probes: <ul style="list-style-type: none"> What it looks like. Feels like. Where do you get these impressions from?
Activities/Benefits Vacation Type:	Probes: <ul style="list-style-type: none"> What will you do there? What are the day to day things? What kind of a vacation is this for you? How will you benefit? Where do you get this perception from?
Accessibility/Travelling:	Probes: <ul style="list-style-type: none"> What are your thoughts on getting to this country and vacationing there? Is it easy or difficult to access, get accommodation and vacation there?

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- Where do these impressions come from?

Planning the Vacation:	Probes: <ul style="list-style-type: none"> How will you arrange or put this vacation together? What process will you go through, what will you do? (Probe deeply on channels, promotions, advertising). Why will you put it together that way?
------------------------	---

Advertising/Promotions:

For Canada specifically:

- Understand its benefits as a "combination" destination with U.S. and Europe. (And, is its role the same between the two?)
- Vs. its role as a "solo" destination.
- Have you heard or read much about this country? What have you heard or read, what are the sources? (TV – what channels, daily newspapers, magazines, newsletters, direct mail, internet – what sites, blogs)
- Have you seen much advertising or promotion for destination? Where, when, what was the message?
- What is this country trying to say about itself as a vacation destination?
- Who is it aiming its message at (target) and why them?
- Why is this country a good travel destination for this type of traveler? (target)

- Taking all of these things into consideration what are the strongest triggers that make you want to go to this destination? (Gather and rank order from most compelling to least).
- What are the biggest barriers? (Again, gather and rank order).

Moderator instruction:

Repeat above section first for all high interest destinations for the group, next high interest destinations in general but, not necessarily for the group, and then the lower interest destinations.

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4. Canada's Competition (10 min)

In this section the objective is to determine which countries compete with Canada directly in a "choosing a vacation" context.

- I am going to write down on these recipe cards all of the long-haul destinations, because we are going to going to sort these cards. **(HAVE RESPONDENTS READ OUT ALL THE DESTINATIONS THEY FEEL ARE LONG-HAUL AND WRITE EACH ONE DOWN ON A SEPARATE RECIPE CARD. MAKE SURE CANADA IS ON THE LIST).**
- First I would like you to tell me what you used for criteria in determining what long-haul vs. short-haul is.
- Now, I would like you to **group** these cards/countries based on ones that you feel compete with each other if you were considering taking a long-haul trip. I would also like you to give these groupings a "nickname".
 - Discuss each grouping:
 - Why do these group together?
 - Why this "nickname"?
 - What is common?
 - What motivates you to go to these destinations?
 - What do you get out of going to these destinations?

REPEAT FOR EACH GROUPING

5. Exploration/Free Association (In-Depth) of Canada and Competing Countries (15 min)

The main objective of this section is to gather a very deep understanding of Canada in the context of its closest competition.

- I would like to do an interesting exercise with you on two destinations:
 - Canada
 - A competing destination.
- We talked quite a bit about both of these destinations earlier. I would now like to talk more specifically.

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- Again, I would like to write down on cards all of your thoughts and opinions about Canada. (Gather as many thoughts and impressions of Canada as possible).
 - When you think about going to Canada:
 - What do you look for?
 - What is important to you?
 - What do you prefer?
 - (Determining which attributes are most important and/or operative in the decision process.) I would like you to place each attribute into one of the following categories:
 - Very important
 - Somewhat important
 - Not important
 - For the very important attributes probe extensively:
 - How does this affect the situation?
 - What if it wasn't there?
 - Was it always this way?
 - How would others feel if they were there?

REPEAT FOR THE OTHER DESTINATION THAT CANADA COMPETES WITH
(NOTE: ROTATE COMPETING DESTINATIONS FROM ONE GROUP TO THE NEXT).

- Conduct a close comparison of the two countries and assess their relative strengths, weaknesses, attractiveness, and barriers.
 - Is Canada a priority or secondary destinations (PROBE FOR US AND EUROPE)?
 - Why isn't it a priority destination?
- What advantages does Canada offer over Europe and the U.S, specifically?
- To what degree has perceptions of the U.S. (especially if perceptions have changed) had an impact on perceptions of Canada?

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6. In-Depth Image of Canada (20 min)

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Objective: To gather in-depth understanding positive and negative Canadian imagery.

- I would like to do another creative exercise. I would like you to turn Canada into something other than a country.

Exercise #1

If Canada were to turn into (select from one below) what would it be like?

- A piece of music
- A home
- A shoe
- A relationship

Review each in detail:

- Why this?
- What is positive about this?
- What is negative about this?

Let's plot these countries (Canada and its direct competition) on the following scales:

New and Emerging ← → **Has been around for a while**
There will always be something different to explore or see ← → **There is only the same old stuff to explore and see**

- (Explore perceptions on latent demand) Do you think that demand for Canada will increase over the next 5 to 10 years or stay the same or decrease?
- Also explore any desire to live in Canada.

Moderator: Create additional scales if others emerge in session.

Exercise #2

I have several pictures of Canada that I would like to have you sort into 3 groups: extremely motivating to want to go to Canada; moderately motivating; not very motivating.

- Go through the extremely motivating pictures and gather reasons why they are motivating:
 - What is catching your attention here?
 - What is getting you excited/interested?
 - Is this similar to what motivates you to go on a long-haul trip?
 - How is this different from (key competing countries)?
- Go through a few of the less motivating pictures and understand what is missing.
 - Why do these not motivate as much?

7. Summary on Canada (10 min)

The main objective is to understand what the consumer uses as strength in attempting to market Canada.

- Given all of the strengths points of interest and unique aspects, how would you describe a holiday to Canada?
- Who is the most appropriate market for this kind of holiday? Who would find this kind of holiday appealing? (Target)
- How should Canada advertise or promote this type of holiday? What should they say?
- Where should they put their advertising/promotion and why? (Probe specific media).
 - Now what kind of travel packages would be really appealing to this type of vacationer?
 - Group?
 - Individual?
 - All inclusive?
 - Activity/interest focused?
 - Discounted/effectively priced?
 - Best package components (correct accommodations, duration, ground activity, etc.)?
- When should they advertise/promote and why?

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- Finally, what kind of "interest" itineraries do you think could be appealing to people vacationing in Canada? Think about your own hobbies and interest (for example: garden, ocean wildlife, Canadian history/Heritage sites).

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8. _____ Future Trip to Canada (10 min)

The main objective is to gather the consumer plan of action in the context of a trip to Canada.

- If you were planning a trip to Canada what would the details be:
 - During what season would you go?
 - What would be the duration of the trip?
 - What would be the main influencers in planning this trip?
 - Who would you go with?
 - What parts of Canada would you visit?
 - Why those parts?
 - Are you interested in seeing other parts? If so, why wouldn't you visit them on this trip?
 - What sources would you use to decide where to travel in Canada?
 - If you'd use the Internet, what sites?
 - Would you use travel agents? What is their role?
 - Any other sources?
 - Describe the nature of your trip.
 - How much time will you take to plan this trip?
 - How much time will you take to book it?
 - What sources would you use to purchase trip components/package?
 - What would your party composition be?

9. _____ Review of Ad/Collateral material (10 min)

The main objective is to review various marketing materials to determine their effectiveness.

- To be completed upon seeing the materials.
- Core issues will be explored, like:
 - Evaluating interest
 - Persuasion
 - Breakthrough ability

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Travel Trade Interview

Organization: _____

Type: Retail [] Wholesale [] Both Retail/Wholesale [] Airline []

Name: _____

Title/Position: _____

Proportion of Long Haul to Short Haul Business: _____

A. Current Perceived Trends in the Australian Travel Market

Objective: This section is designed as a general overview to gather the travel trade's opinion and impressions of changes in the following:

- The consumer.
- Travel retailing.

1.a Thinking over the past few years, what trends or changes have you seen in the long-haul travel market, overall? For example, are some countries becoming more popular and are some becoming less? If so, which ones? Assess perceived appetite for and interest in Canada.

1.b If not mentioned, has the consumer changed in any way? PROBE ON CHOICE OF DESTINATION, PURCHASE OF TRIP, INTEREST OR ACTIVITIES, TRIP ITINERARIES, PARTY COMPOSITION, SENSITIVITY TO SEASONALITY.

1.c Has how consumers booked vacations changed in anyway? Are they using the Internet more or less, going through different channels or organizations? What kind of services do they use? In general, are they behaving differently?

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1.d Have the products changed over the past few years? For example, new and different countries, packages, flights, or itineraries? Is this having any effect on the consumer or your business?

1.e Has advertising and/or promotion to the consumer changed at all over the past few years? Is there more or less? Is it different, is it emphasizing different aspects like price, flights, or itineraries? What effect has this had on the consumer/your business?

1.f What do you think are the main causes or influences behind each of these trends/changes you identified? (in Q.1.a to 1.e) What do you think is really going on? (WE NEED TO UNDERSTAND WHAT IS DRIVING THOSE TRENDS. THIS CAN INCLUDE NEW COUNTRIES OF INTEREST, ECONOMIC ISSUES, POLICY ISSUES, NEW FASHION OR CELEBRITY INTERESTS, COST, ETC.)

1.g Five years from now, what other consumer or industry changes can we expect to see? (ASSESS IF THESE CHANGES ARE LONG TERM OR SHORT TERM)

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Current Perceived Trends/Changes in the Trades Business

Objective: This section is designed to gather specific information on the travel trade industry.

- 2.a Now, thinking about all of these changes, which ones have had the biggest affect on how you do business? And, how has your business been affected?

- 2.b Specifically, how have process/the industry changed for you?

- 2.c Could you give us a current profile of your clients? Who are they now and what do they want? Have they changed in any way, if so in what way?

- 2.d To what degree has the Internet had an effect on your business or your clients?

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- 2.e What kind of service/services do you offer now as a result of the changes in your business?

- 2.f How often do your clients come to you with specifics in mind and what are they specific about? Do they come to you with an exact destination in mind?

- 2.g Overall in the future, what do you think is the outlook for travel outside of Australia and Oceania? Will some countries continue to grow and some decline? If so, which ones and why?

C. Perceptions of Canada

The objective of this section is to understand:

- *The IT perception of the consumer in the context of Canada and*
- *Their own perceptions of Canada.*

- 3.a Why do Australian people travel to Canada? What are the main reasons? What do they want to see? Activities of interest? (PROBE SPECIFICALLY FOR VACATION TRAVEL)

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3.b Have these consumer reasons changed in the past few years or so for travel to Canada and, if so, why? (PROBE FOR SPECIFICS)

3.c What are your perceptions of Canada as a holiday destination? And have your perceptions changed over the past few years? If so, why?

3.d Thinking specifically of Canada's image as a holiday destination, what is your professional impression? What are the strengths/advantages and the weaknesses/barriers today? (Assess the degree to which lifestyle (desire to live in Canada), VFR, skiing, and outdoor activities in general play a role).

3.e Have you always felt this way, or is this a more recent perception/image? (IF THERE HAS BEEN AN IMAGE CHANGE). What has created/caused this change in image?

3.f To what degree is a trip to Canada a part of a trip to the U.S. or Europe?

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3.g What is Canada's role in the combined trips? (PROBE SEPARATELY FOR U.S. AND EUROPE)

3.h What kind of Brand Image do you think Canada should have as a holiday destination? What aspects should it promote about itself?

3.i IF NOT ALREADY MENTIONED ASK: In your opinion do you think interest in travel to Canada is up, down or about the same as a few years ago. (IF UP OR DOWN) Why do you think it is going in that direction? (PROBE ON BOTH THE CONSUMER PERSPECTIVE AND THE TRADE PERSPECTIVE)

D. Competitive Analysis

Objective: this section is to understand the trade's perceived competition set for Canada. Their comparative strengths and weaknesses and specific retail activities.

4.a Who are Canada's main competitors among other long-haul destinations? Why? (ONCE THE RESPONDENT HAS HAD A CHANCE TO GIVE THEIR OPINION THEN PROBE SPECIFICALLY ON THE FOLLOWING COUNTRIES: CHINA, ASIA, MIDDLE EAST, EUROPE GENERAL, FRANCE, ITALY, U.K., UNITED STATES)

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4.b In your opinion, have these competitors changed from a few years ago and, if so, who has and why? (AGAIN DRILL DOWN ON ABOVE MENTIONED COUNTRIES)

4.c What are Canada's strengths/advantages over these recent competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC AND ATTACHED TO THE COMPETING COUNTRY)

4.d What are Canada's weaknesses/disadvantages compared to these most recent competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC TO THE COMPETING COUNTRY)

4.e What are the specific products or packages that are selling really well? First for Canada and then for the competitive countries? (FOR EACH ITEM ASK WHY). What are the strengths of these products/packages?

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4.f Referring specifically to all of the products/packages in question 4e, how are you selling it? What do you do, what do you say?

4.g Have your ideas of what Canadian destinations to recommend changed? If so, in what way?

4.h To what degree do you encourage travel to all or any of the three regions in Canada? (PROBE SEPARATELY FOR WESTERN, EASTERN, AND CENTRAL.)

4.i What about destinations in other countries? Do you recommend different regions within a country, and why?

4.j What are your current attitudes towards U.S. travel and its products? Have they changed over the past few years? Are they likely to change in the near future? (ASSESS IN WHAT WAY THESE PERCEPTIONS ARE RUBBING OFF ON CANADA IN EITHER A POSITIVE OR NEGATIVE WAY)

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E. Travel Products

The objective of this section is to gather impressions that the trade has about travel products.

- 5.a On what basis do Australian people choose their vacation products or packages? What is the relative importance of price, itinerary, accommodations, destination appeal, convenience, availability of flights, good food, safety, shopping opportunities, reputation, etc.? Can you rank or prioritize those for me? (PROBE SPECIFICALLY IF ANY CHANGES HERE HAVE AFFECTED TRAVEL TO CANADA) Have there been any changes?

- 5.b What are the most desired or popular travel products or packages for Canada that Australian people are buying? In other words, what are they asking for? Detail independent vs. group tour, duration of trip, places visited, main activities. Obtain wholesale/agent brochures and mark on them the most popular products. (ASSESS IF THEY ARE STILL CONSIDERED TO BE CURRENT AND ATTRACTIVE OR HAVE THEY BECOME LESS RELEVANT AND ATTRACTIVE)

- 5.c What price range are Australian people looking for with long-haul destinations? (HAVE ANY CHANGES HERE AFFECTED TRAVEL TO CANADA OR FOR THAT MATTER TRAVEL TO OTHER LONG HAUL DESTINATIONS)

- 5.d On what basis do you choose a particular travel product to sell? (PROBE FIRST ALL DESTINATIONS AND THEN PROBE FOR CANADA)

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- 5.e What packages/products do you try to sell and why? What about specifically in Canada?

- 5.f Do you see any opportunities for extending visits to Canada by 2 to 3 days? What would those opportunities be? What would be of interest to the Australian traveller?

- 5.g How is the profile of your Canada destined clients different from those destined to other long-haul destinations, if at all? (LOOK FOR DEMOGRAPHIC DIFFERENCE – e.g. AGE, INCOME, EDUCATION, FAMILY STATUS, ETC. PROBE FOR CHANGES IN ANY OF THE TARGETS)

- 5.h What kinds of vacations should Canada now be offering to attract either existing or new targets. (Details independent vs. group tour, duration, places visited, main activities.) (MAKE SURE THE FEEDBACK IS SPECIFIC, THIS IS A VERY IMPORTANT QUESTION.)

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- 5.i What travel packages or products are available to other destinations that would be ideal for Canada. (Detail destinations and relevant package details. Obtain brochures where possible and mark the key vacation product opportunities.) (MAKE SURE THE FEEDBACK IS VERY SPECIFIC)

- 5.j Where in your company does the influence for changing the product/packages you are selling come from?

F. Travel Barriers

Objective: To uncover the trade's perceptions of barriers and weaknesses in selling Canada.

- 6.a What are the major barriers or weaknesses holding people back from vacationing in Canada? (Obtain details, probe why and how to resolve.) (For example, if airline capacity is an issue, determine details on desired frequency, timing, and to what cities.) What complaints have you heard from clients? Barriers could include airline capacity, pricing, lack of knowledge, lack of packages, destinations choice issues, activity issues, accommodation issues, loss of "wow" factor.) PROBE SEPCIFICALLY ON THE NEED FOR A VISA FOR ENTRY)

- 6.b What specific problems have you experienced in selling Canada? Can you provide suggestions on anything Canada can do to overcome these weaknesses or barriers?

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Trade Support

Objective: to understand the areas where the trade needs additional or more support in selling Canada.

- 7.a What can Canadian travel industry do to improve its marketing in Australia? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC. PROBE DEEPLY)

- 7.b Specifically
i Assistance for the trade (RECORD DETAILS)

- ii Product development? (RECORD DETAILS)

- iii What key marketing messages/themes would you suggest to sell Canada to potential travelers from Australia? (RECORD DETAILS)

- 7.c What is the best way to reach the target vacationer to Canada? In what medium should the message be placed?

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7.d What would be your top 3 recommendations for the Canadian tourism industry to increase tourism from Australia?

7.e What are the specific destinations within Canada doing right to attract holiday travelers?

7.f What are they doing wrong in attempting to attract holiday travelers?

7.g How much contact do you have with Canadian officials regarding increasing travel to Canada? What is the nature of this contact? What do you think they could do to help raise holiday travel? What could they do to help you raise holiday travel to Canada?

7.h Do you have any comments on the Canadian Tourism Commission?
Please be honest in your comments. Your concerns, suggested improvements, or complaints would be very valuable to us.

i Any complaints?

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ii What is it doing right?

iii Ways it could improve its service to you?

iv Do you receive office e-mail correspondence from the Canadian Tourist office? Is it effective? How could it be improved?

7.i Are the brochures they provide to trade effective? Can you show me any outstanding brochures for other countries that are really effective?
(ATTEMPT TO OBTAIN A COPY)

7.j Do you have any other comments or questions?

THANK YOU

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