

# **European Segmentation Study**

## **British Columbia Summary**

**February, 2008**

*Prepared for:*

**Tourism British Columbia**

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**Foreword**

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## Methodology

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The research was designed to meet 6 business goals of the Canadian Tourism Commission (CTC), Tourism British Columbia, Ontario Tourism Marketing Partnership, Alberta Tourism, Parks, Recreation and Culture, Travel Manitoba, Atlantic Canada Opportunities Agency, and Government of Yukon, Tourism and Culture (hereinafter the "Partners").

1. To understand **why** tourism to Canada has not grown faster.
2. To design the **most effective advertising and marketing communication** to reach the potential markets.
3. To make use of the most effective **communication channels** to reach the target market.
4. To provide direction and **assistance for the travel trade** to accelerate the growth of pleasure travel to Canada.
5. To identify the **target segments** for travel to Canada.
6. To create market-sensitive **product packages**.

This report focuses on the most relevant data for British Columbia from the three European studies.

## Methodology

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### Phase One: Review of Existing Data

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

Information of particular relevance to the existing research included:

- Economic performance
- Consumer Confidence
- Disposable Income
- Long-haul trips, 2000 to 2006
- Destination patterns of long-haul travellers
- Domestic Travellers, 2000 to 2006
- Value of the British pounds vs. the currencies of major destinations

### Phase Two: 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 U.K., French and German travellers.

Six groups (recruit 8 for 6 per group) were conducted in each of the following cities: London, Paris and Frankfurt. All participants had either travelled internationally in the past 3 years or had plans to travel internationally in the next 2 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).

Age	Male	Female	Mixed
Younger 30 - 49	Have not travelled to Canada	Have not travelled to Canada	Have travelled to Canada in past 3 years
Older 50 - 69	Have not travelled to Canada	Have not travelled to Canada	Have travelled to Canada in past 3 years

## **Methodology**

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### **Phase Three: In-depth Interviews with the Travel Trade**

As a great deal of the Partners' activities in each country 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 each market.

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 in each market, including:

- Tour Operators/Wholesalers
- Travel Agents/Retailers, and
- Canadian representatives

In addition, 5 interviews were conducted with Canadian Receptives in Canada who deal with each market.

## Methodology

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### Phase Four: Consumer Quantitative Survey

A national online panel operated by OpenVenue was conducted with long-haul travellers aged 18 and older (U.K. n=2,697, France n=2,544, Germany n=2,548) from October 20 to November 15, 2007.

Respondents met the following criteria:

- Travelled outside of European Union countries, North Africa and the Mediterranean for 3 nights or more with at least 1 night in paid accommodation 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 European Union countries, North Africa and the Mediterranean for 3 nights or more with at least 1 night in paid accommodation in the next 2 years.

An oversample was implemented among past travellers to Canada. This was achieved by screening the main panel fully 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 following chart shows regional destinations of the recent travellers to Canada.

	<b>U.K.</b>	<b>France</b>	<b>Germany</b>
B.C.	n=401	n=122	n=349
Alberta	n=281	n=70	n=246
Saskatchewan	n=50	n=30	n=66
Manitoba	n=45	n=42	n=62
Ontario	n=490	n=416	n=392
Quebec	n=215	n=639	n=283
Atlantic	n=102	n=140	n=142
Yukon	n=40	n=38	n=77
Northwest Territories	n=30	n=60	n=72
Nunavut	n=18	n=34	n=34

The average duration of interview was 20 minutes. Detailed tables are available in a separate file. The questionnaire is appended for reference.

## **Methodology**

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### **Omnibus Survey**

In addition to the online survey, a telephone omnibus survey was conducted among 1,000 adults 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, an age weight was applied to the online sample to reflect a more accurate distribution of past/future travellers among each age group.

### **Phase Five: Regional Products Innovation Online Forums**

Two 5-day forums (recruit 12 for 10 per forum) were conducted per market with past and prospective Canada travellers to evaluate specific tourism products from each partnered province.

All participants had either travelled internationally in the past 3 years or had plans to travel internationally in the next 2 years.

These groups were made up of a mix of males and females, age 30-69 with a mix of life stages (e.g., families with children 8 to 18 and households with no children).

One of the forums was among those who had visited Canada in the past 3 years, and claimed that their last trip to Canada was very enjoyable. All participants must **not** have stayed or spent more than 50% of their trip with friends or relatives. At least 4 participants must have visited Western Canada and 4 visited Central/Eastern Canada.

The other forum was with those who had **not** yet travelled to Canada, but are seriously planning to visit Canada in the next 2 years. They must be planning to stay in a paid accommodation for at least 50% of their trip and likely to spend at least half of their trip away from friends or relatives. At least 4 participants must be seriously considering visiting Western Canada and 4 Central/Eastern Canada.

## **Report Layout**

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The report is laid out in the following sections:

### **Key Findings**

- ◆ This section highlights the most important findings for British Columbia.

### **Marketing Considerations**

- ◆ What action the research suggests for British Columbia is outlined here.

### **Section 1: The Image of Canada**

- ◆ The image of Canada among long-haul travellers from the U.K., France and Germany are summarized in this section.
- ◆ The analysis includes image strengths, barriers, the ideal positioning and the specific implications for British Columbia.

### **Section 2: British Columbia Trip Characteristics**

- ◆ Those who included British Columbia on their last trip to Canada describe details of their trip in this section.

### **Section 3: Ideal Trip to British Columbia**

- ◆ Long-haul travellers who would include British Columbia or their ideal trip to Canada describe the details of their future trip.

### **Section 4: Product Forums**

- ◆ Past and prospective visitors to Canada participated in online forums designed to determine the most appealing itineraries not just Canada wide but also within each region.
- ◆ Through extensive website research on their part, prospective visitors were able to articulate precisely what kinds of vacations would appeal to them within British Columbia.

### **Section 5: The Buy Cycle Model**

- ◆ This section explains the new Buy Cycle Model which directs marketers on how to advance prospects along the path to purchase.

## **Methodology**

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### **Section 6: Breaking Down Buy Cycle Barriers**

- ◆ The importance of correctly designed websites is reviewed here, along with ratings of all specific sites provided by provincial/territorial partners used by consumers for reference in the Product Development Forums.

### **Section 7: The Travel Trade**

- ◆ The role of the trade is changing and the partners must address the new environment. Implications are discussed here.

**Key Findings**

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## **Key Findings**

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### **Travel Product Review**

Both current travel behaviour and product development opportunities differ somewhat by origin market. They can be summarized as follows:

#### **U.K.**

- ◆ British Columbia is a favourite destination for U.K. travellers to Canada (34% of Canada bound trips spend one or more nights in B.C.).
- ◆ On average, they spend 8 nights in the province out of 15 in Canada. B.C. visitors more often than not travel only to Western Canada, half including Alberta in the itinerary.
- ◆ Just under half (42%) are visiting friends and/or relatives, a significant travel motivator in the U.K. market. However, beyond VFR, the U.K. traveler wants not only to take in the spectacular scenery, but also experience local culture, interact with people and relax and unwind.
- ◆ As with most foreign visitors, their principle reason to visit Canada is to experience nature, but the British tend to be far less adventurous than the Germans or French. They have a desire to keep one foot solidly planted in an urban setting which provides security, a chance to socialize, cultural attractions, good food and accommodation.
- ◆ This need for a balanced vacation between urban and rural dictates how British Columbia should be positioned – the opportunity to experience first class Canadian cities, their people and culture, as well as true nature in the same area. It is not surprising, then, that seeing Vancouver and the surrounding area is a prime objective of U.K. travelers to B.C.
- ◆ The majority of U.K. visitors are FIT (84%), typically with no package (54%). Consequently, they have and are likely creating their own customized itineraries.
- ◆ U.K. travellers express strong interest in 2 to 7 day modular packages that take them to interesting, less well known areas. These clearly would appeal to those with customized itineraries.
- ◆ Beyond a common itinerary of Vancouver and the Rockies (often via the Rocky Mountaineer train), high on the list of appealing “side trips” are Victoria, Tofino and whale watching on Vancouver Island, Whistler and the interior wine country.

## **Key Findings**

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- ◆ One of the major barriers to marketing British Columbia is that prospective visitors are very unaware of what there is to do beyond Vancouver and the Rockies. However, their positive response to a wide range of available attractions, based on website perusal during the online forums, confirms significant potential.

### **Germany**

- ◆ British Columbia also attracts a solid share of German travellers destined to Canada (35%).
- ◆ However, B.C.'s German visitors are more likely to be travelling to multiple regions – notably Eastern Canada (Ontario and/or Quebec), as well as Alberta. Hence, British Columbia is only one, although significant, stop – averaging 9 nights out of 17 in Canada.
- ◆ Germans need to be convinced that Western Canada and B.C. in particular is worth a unique trip to Canada—a destination that can satisfy all their needs.
- ◆ German travelers do want city experiences on their vacations, but only in a measured dose. Their prime interest is getting out into open spaces and authentic nature and experiencing small town living, as well as cultural experiences.
- ◆ Their key difference from U.K. travelers is that Germans are more adventurous when it comes to venturing into nature. They are also more interested in aboriginal attractions and other cultural experiences outside of the cities. The British need less time deep into nature and a rural environment, more time in a civilized setting with urban comforts and culture.
- ◆ B&B's, resort hotels, authentic lodges and motor homes all have significant appeal to Germans since they facilitate those desires.
- ◆ The majority of German travellers to British Columbia are FIT (93%), typically no package (64%). Consequently, most are not locked into existing packages.
- ◆ Reviewing the B.C. website in the online forums, German travellers became particularly excited about Vancouver Island—whale watching, Tofino, aboriginal art galleries.
- ◆ As with the U.K. market, awareness of these attractions is very low, and, as discussed later, directing prospects to B.C. websites is essential.

## Key Findings

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### France

- ◆ The French market has an overwhelming preference for Quebec (81% of Canadian arrivals stays overnight in that province). British Columbia tends to be a very minor destination at present—only attracting 5% of Canadian arrivals.
- ◆ On average, the French visitors to British Columbia spend 6 nights in the province out of 15 in Canada and almost invariably spend time in Eastern Canada on the trip (83%).
- ◆ The main interest of the French in Canada is to get close to the life of French Canadians – to feel their way of life which they perceive as a reflection of their own past – where French people lived close to and in harmony with nature.
- ◆ This French connection is so powerful that other provinces, including British Columbia, would do well to focus on the opportunity to see first hand evidence of early French settlers or the routes of French voyageurs through the province. The French have an insatiable appetite to feel that presence.
- ◆ However, beyond the historical factor, the French want to see wonderful scenery and the beauty of nature. Interacting with local people and aboriginal attractions are also high on their list of appealing activities.
- ◆ In the forums, one of the complaints after reviewing the Tourism BC website is that distances between places seem quite vast and overwhelming. This reinforces the importance of providing itinerary ideas with route distances and travel times on the websites, as discussed later. If prospects run into these types of barriers, they will simply turn off their enthusiasm and direct their attention somewhere else.

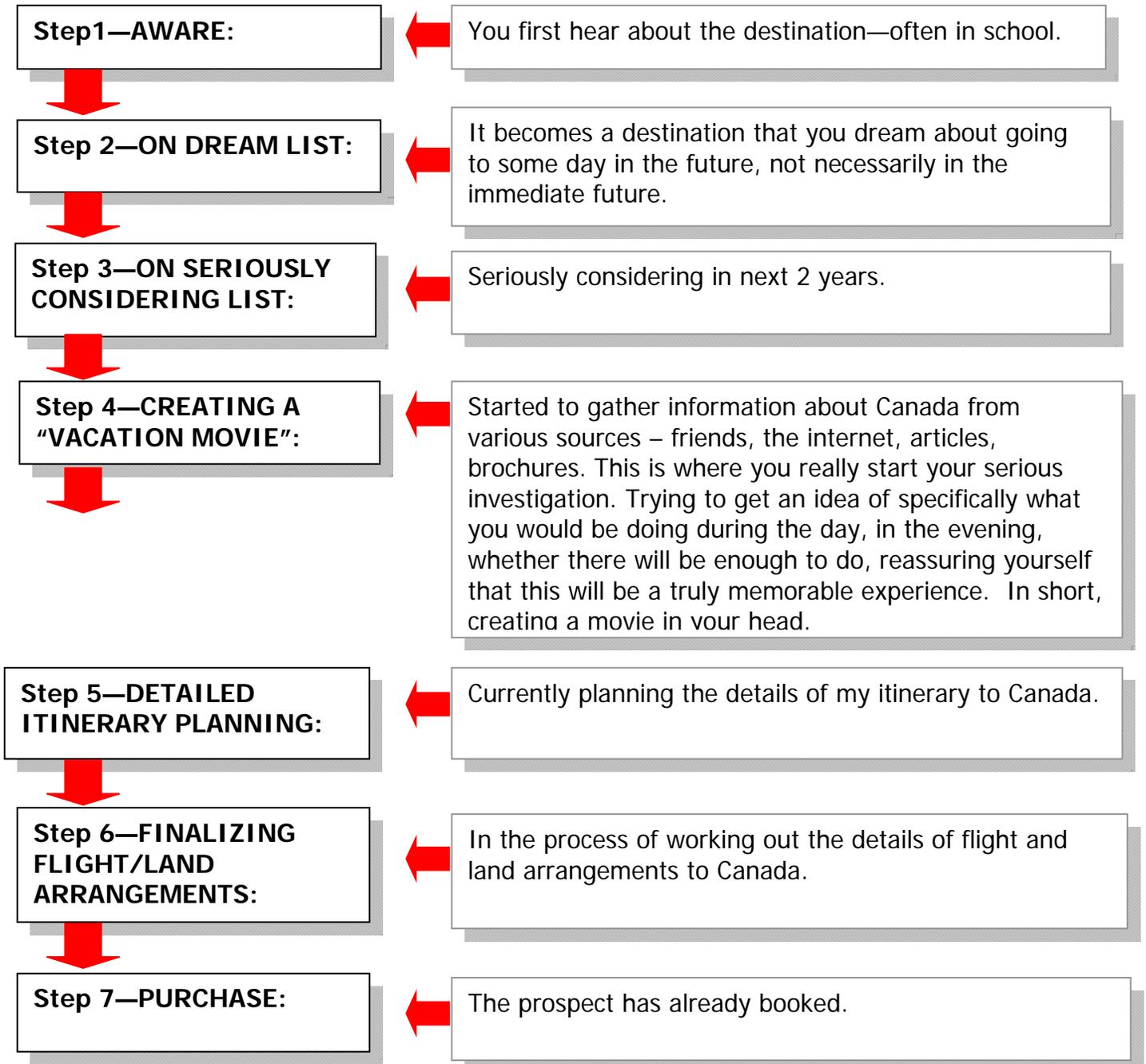
## Key Findings

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### Breaking Down The Buy Cycle Barriers

Insignia has developed a Buy Cycle Model which identifies where on the path to purchase there are bottlenecks.

The Buy Cycle Model is a 7-step process.

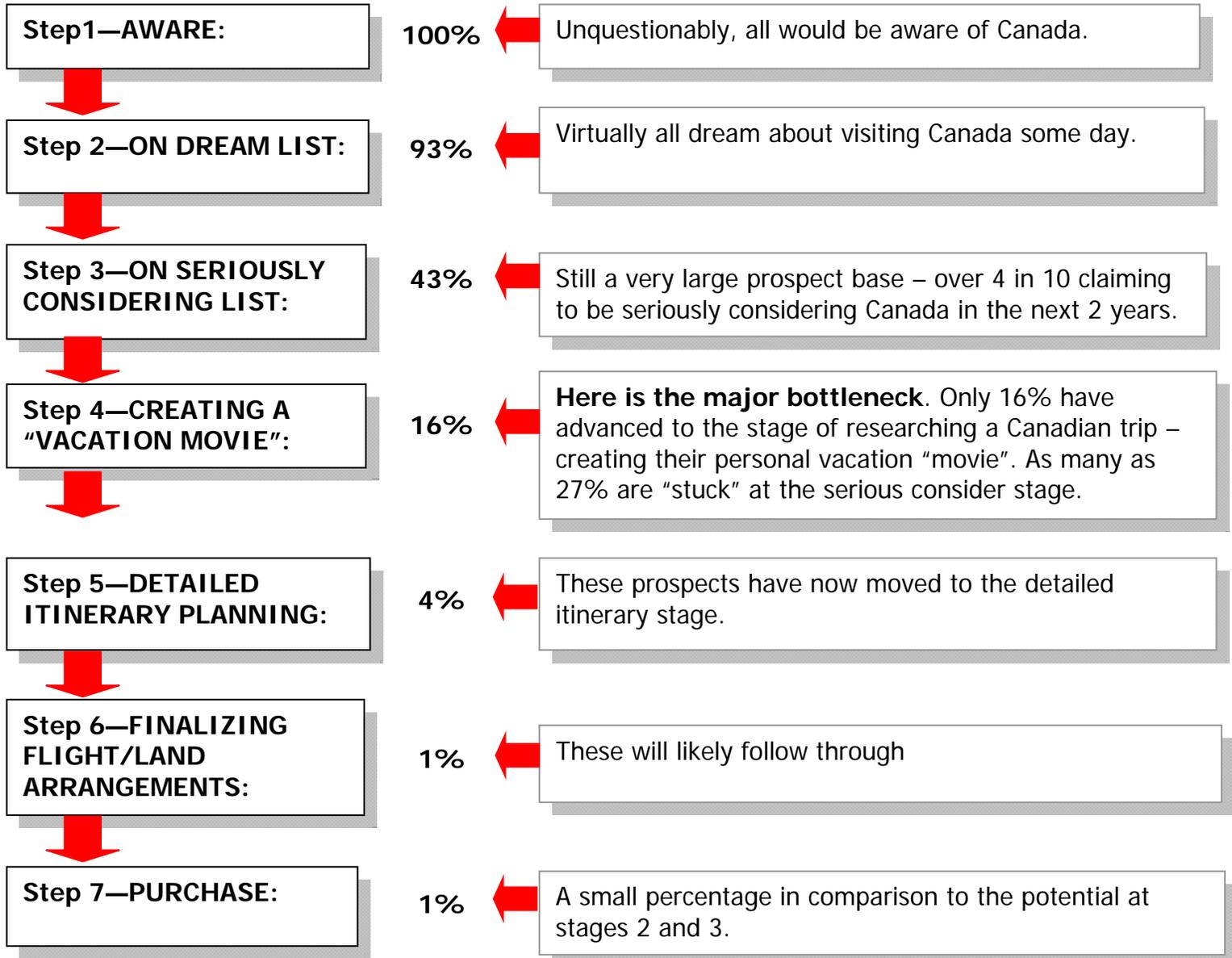


## Key Findings

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The major bottleneck for Canada is at Step 4. Between 6.7 and 7.7 million prospective visitors in each country are blocked here. This is where the Partners should focus their marketing – helping prospects create their own “movie”.

### European Markets



## **Key Findings**

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### **The Ideal Movie**

The ideal movie includes very specific parameters:

1. A route or itinerary
2. A sense of time, distance
3. The promise of memorable moments/activities
4. Reassurance of fun and good times
5. Reassurance of comforts (accommodation, good food)
6. Approximate budget requirements

Beyond the advice of friends and relatives who either live in Canada or who have travelled here, the internet is the dominant source for “movie” building.

However, most official sites appear to be built for the North American market, not the overseas audience.

They assume travellers are basically familiar with distances and travel times.

Yet, for Europeans, prospective visitors express lack of awareness of place names, or distances involved.

One forum participant after reviewing the Ontario website decided that an ideal trip would be to visit Toronto and Niagara Falls and then take a few days to hike around Lake Superior! U.K. residents, who are used to a much smaller scale, how little idea of distances involved. Continental Europeans are not dissimilar.

French travelers reviewing the Tourism BC website found distances between locations overwhelming and potentially unmanageable, without clear guidance of actual distances and travel times.

Clearly, they need:

- ◆ Maps
- ◆ Itinerary suggestions
- ◆ Routes with trip times by various forms of transportation
- ◆ “Must-sees” along the way
- ◆ Pictures, video tours, etc., of highlights along the way

In times past, very popular (and still today) were the route suggestions in guide books like Fodor's. For example, if you only have 5 days in Japan, here are the places you should visit and the itinerary you should follow.

Travelers unfamiliar with a destination need this type of guidance and perspective.

## Key Findings

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The Insignia team graded 26 websites on their ability to meet the requirements of European travelers in the planning process. The website addresses were provided by the participating provinces and territories and provided to participants in Insignia's Forums for product reference.

The site provided by British Columbia could use some improvement—particularly in finding visuals and providing itinerary ideas both of which are essential to facilitating the "movie" creation.

### Criteria:

1. Ease of finding visuals
2. Ease of finding suggested itineraries
3. Ease of finding route maps
4. Ease of trip planning
5. Ease of linking to online community (including rss feeds)

### Rating scale:

- E – Excellent, included in main navigation or front page  
A – Acceptable, fairly simple to find  
P – Poor, difficult to find  
N – Not available

Web Site	Criterion				
	1	2	3	4	5
Tourism BC   Official Travel Website of British Columbia. <a href="http://www.hellobc.com/en-CA/default.htm">http://www.hellobc.com/en-CA/default.htm</a>	P	N	E	E	E

## **Key Findings**

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### **The Travel Trade**

- ◆ Largely because of the evolution of the internet, consumers are now researching destinations and empowering themselves with decision making knowledge.
- ◆ When they visit a travel agent, they usually know which country they want to visit.
  - ◆ In 1997, 73% of U.K. travellers said that travel agents were influential in choosing Canada.
  - ◆ Today, only 7% in the U.K. say that travel agents have any role in their choice of Canada.
  - ◆ In Germany, the comparable figure is 7%, in France 16%.
  - ◆ The travel trade interviews confirm these findings.
- ◆ This raises the question about the agent's ultimate influence in selling Canada.
  - ◆ It may be time for British Columbia to evaluate how much of its resources should be directed toward the trade, since they are no longer primary sellers of Canada.
- ◆ However, where the agent still can be beneficial, especially those in the Canada Specialist programme, is with specific in-Canada product – selling up or directing clients to options within the province.

## **Marketing Considerations**

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The following are the recommended top five priorities for British Columbia in marketing to the U.K., French and German markets.

1. Encourage the industry to redesign their websites to specifically make it easy for prospective visitors to create their own “movie”. This must include itinerary ideas that breakdown the perceptual barriers of great distances between attractions.
2. Once the websites are at their optimal design, engage in advertising and promotion to drive prospects to those websites. This may involve partnering with the CTC, creating links between sites and ensuring high presence on word search engines. It must be remembered that the internet is more a tool for planning, not a source of destination inspiration. Hence, prospects need to be reached through a broader campaign to encourage website visits.
3. Position British Columbia in advertising and promotion to reflect the core needs of each origin market:

**U.K.** – British Columbia is a region worthy of its own trip to Canada. It has incredible nature in close proximity to interesting and unique Canadian cities where traveler can take part in a wide range of cultural experiences, stay in comfortable accommodation, dine and socialize with both new and old friends.

**Germany** – A trip to British Columbia provides a unique combination of incredible natural (mountains, sea and whale watching), the opportunity to get involved (kayaking) and fascinating cultural experiences, all within a short distance of first class cities.

**France** – Explore another part of Canada opened up by French voyageurs. Experience incredible nature and the way of life of friendly, welcoming Canadians.

4. To get travelers off the beaten path, encourage the industry to create 2 to 7 day excursions (packages or itinerary ideas) throughout British Columbia to entice FIT travellers destined to Vancouver and on to the Rockies to explore more of the province. Each excursion needs a “hook” or icon to attract Europeans—such as whale watching, scenic Victoria, wine regions.

Important learning is that European visitors would be very satisfied with products that are fairly common for North American travelers—e.g. Tofino, Victoria, whale watching, Whistler, the Okanogan, wine country. The issue

is that people are not aware that these experiences exist, and they are not available in main stream packages.

5. Arm Canada Specialists with specific excursion product to market to FIT travelers which will encourage them to travel beyond the familiar and to spend more time beyond the provincial tourist icons.

**Findings in Detail**

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**Section 1: The Image of Canada**

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## 1.1 Arrivals to British Columbia

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British Columbia captures a significant share of Canadian arrivals from both the U.K. and Germany. However, the U.K. is a much larger market at present due to the sheer volume of visitor traffic to Canada.

The French market is much smaller at present, due to their powerful preference to visit Quebec.

However, as discussed later, there is considerable potential to attract French visitors to B.C., as there are opportunities to expand the U.K. and German markets.

	<b><u>Arrivals To Canada</u></b> #	<b><u>Arrivals to British Columbia*</u></b> #	<b><u>B.C. Share of Canadian Arrivals</u></b> %
U.K.	842,000	289,000	34.3
France	361,000	19,000	5.3
Germany	298,000	104,300	35.0

\*Overnight stays—2006 Statistics Canada

## 1.2 U.K. - The Appeal of Canada

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- ◆ Three underlying reasons why travel from the U.K. market to Canada is well developed:
  - ◆ Predominantly English speaking
  - ◆ Reasonable close (vis-à-vis Australia, New Zealand)
  - ◆ One in four long-haul travellers (7.8 million to be precise) have close friends and relatives in Canada.
  
- ◆ Primary physical attraction
  - ◆ Canada's natural beauty (Rockies, Niagara Falls)
  
- ◆ Secondary attractions
  - ◆ Experiencing unique Canadian culture
  - ◆ Meeting friendly, hospitable people
  - ◆ Experiencing Canadian cities

### 1.3 U.K. – Barriers to Canada

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- ◆ Canada's image is too nature focused.
- ◆ The British are intimidated by extreme nature, remoteness and vastness.
  - ◆ Most have never been in or ever seen a kayak up close.
  - ◆ There is an awareness of bears in Canada which automatically implies that one must be careful in nature.
- ◆ They want a vacation that **balances** nature experiences with urban comforts.
- ◆ The current limited vision of a Canadian vacation is an outdoor nature viewing trip that lacks the urban side of the equation.
- ◆ Their trip concept is not properly balanced.
  - ◆ *"Tell us what there is to do"*
  - ◆ *"When we think of Australia we think of great diversity of things to do. But, we don't know about Canada"*
  - ◆ *"What do you do in-between the cities? How far apart are they"?*
  - ◆ *"Canada is so vast, I didn't know where to start" (i.e. putting a doable vacation concept together)*
  - ◆ *"What's missing is excitement, art, culture, places of interest"*
  - ◆ *"East competes with West – how do I make a choice"?*

## 1.4 U.K. – The Ideal Positioning

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- ♦ Canada needs to be positioned as:
  - ♦ An opportunity to experience unique, authentic nature, while easily retreating to a comfortable environment with good food, quality accommodations, relaxation and socializing with friends.
- ♦ It is the juxtaposition of cities and nature, the fact that they are side by side and that one can easily slide from one environment into the other, that is the true unique appeal of Canada.
  - ♦ *“After seeing the lakes, I can go and relax in a pub with my friends”*
- ♦ The abundance of unique cultural attractions, either in urban or rural environments round out the ideal concept.

## **1.5 U.K. – Implications For British Columbia**

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British Columbia provides the exact mix that British travelers desire—a blend of city (with good accommodation, food, social interaction with both old friends and new friends, a wide range of cultural attractions and a chance to see how Canadians live) in combination with authentic nature nearby.

Vancouver, Whistler and the Rockies are the iconic destinations and most often visited. However, as Section 4 elaborates, there are opportunities to get U.K. travelers off the beaten path and into less iconic regions of the province.

## 1.6 France – The Appeal of Canada

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- ◆ The French are great explorers and travel globally, but the number one destination on their dream list is Canada. As many as 22.0 million French long-haul travellers dream about visiting Canada.
- ◆ So what is it that inspires them? There is no question that the key draw is to experience the French Canadian culture and way of life.
- ◆ They have a very clear vision of a “simpler way of life”, peaceful and calm”, where people live “in communion with nature”.
- ◆ They imagine:
  - ◆ *“Trapper’s cabins”*
  - ◆ *“Story telling”*
  - ◆ *“Warm and welcoming French people”*
  - ◆ *“Speaking genuine French”*
  - ◆ *“They sing French, they don’t speak it”*
- ◆ A perfect day in their minds would be:
  - ◆ *“Get up early, have a ‘woodcutter’s breakfast’ and set off to discover”*
  - ◆ *“Getting up really early and living the whole day at the pace of nature”*
  - ◆ *“Walking around in the woods, eating our meals with a trapper who would be teaching us about nature”*
  - ◆ *“Our ancestors came from France 350 years ago. Let us show you our country and our way of life”*
- ◆ Emotionally, it takes them back to their roots, a time of different values:
  - ◆ *“It’s like going back to your origins”*
  - ◆ *“It reminds us of how it used to be”*

## 1.6 France – The Appeal of Canada

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- ◆ On a deeper level, the experience allows them to reconnect with themselves as a person, a human being, and to find themselves again within (in their view) a very stressful environment in France today.
- ◆ Beyond their emotional connection, which is the key trigger to travel to Canada, the French have a love of nature. They strongly aspire to Canada's natural environment – seeing the rivers (especially the famed St. Lawrence), the waterfalls (Niagara Falls), visiting wilderness areas, mountains, seeing wildlife and whales.
- ◆ The notion of dog sledding, skidooing, kayaking and canoeing excite those who want soft adventure.

## 1.7 France – Beyond Quebec

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- ◆ The typical pattern is to visit Quebec on the first trip, but then on repeat visits they are excited about experiencing other parts of the country. High on their priority lists are Ontario, B.C., Newfoundland and Labrador and the Territories. Nature is the big draw, but in part it also represents an opportunity to get closer to:
  - ◆ *“The rest of the country where our French cousins live”*
- ◆ Clearly, the regions could build on that emotion by focusing on the “routes of the voyageurs” and the early French settlements in the Prairies and Atlantic Canada, for example.

## 1.8 France – The Barriers To Canada

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- ♦ The prime barrier to vacationing in Canada is that the country has not been positioned correctly to capture these underlying emotions.
- ♦ Current brochures and ads focus on natural scenery, outdoor activity, Montreal and Quebec City, but these images do not touch the core driver.
- ♦ The objective must be to link the scenery with the (imagined) way of life to heighten the romance of visiting Canada. Further, as is the case with Germany and the U.K., images need more people and friendly faces. One of Canada's central appeals, is the friendly, welcoming Canadian people.

## 1.9 France – The Ideal Positioning

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- ◆ The primary goal of French travellers is to connect with French Canadians and their way of life. Life in France is very stressful, in their own admission, and they find the opportunity to re-connect with their roots and a more authentic lifestyle both refreshing and grounding. They return to France feeling like a better person.
- ◆ To connect with French Canadians should be the core selling proposition to tap into these emotions and fundamental needs.
- ◆ However, the other product benefit of Canada is our authentic, incredible nature, so ideally the product concepts need to be brought together.
- ◆ This can most effectively be done by addressing it the way French people visualize it:
  - ◆ *“Come to Canada and experience how French Canadians live in harmony with nature”*
- ◆ This concept brings together culture and nature but can also incorporate the third key benefit of Canada—**warm, friendly, welcoming people**.
- ◆ Regions beyond Quebec should concentrate on their:
  - ◆ Unique nature based experiential product
  - ◆ Cultural attractions such as aboriginal tourism
  - ◆ Building in wherever possible the French connection (e.g. early French settlers, voyageurs, etc)

## **1.10 France – Implications For British Columbia**

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Although the focus of the French is on Quebec, Ontario has much to offer for a side trip (for first time visitors to Canada) or as a primary destination (for repeat visitors looking to explore beyond Quebec).

Although the key draw to British Columbia would be nature, any opportunity to exploit the French connection should be taken advantage of. This has powerful emotional benefits. This would include the route of voyageurs and early French settlers in B.C.

Section 4 elaborates on specific product interests within British Columbia. One of the key pieces of learning in that section, beyond understanding product interests, is the utmost importance of providing travel planners with itinerary ideas. The vastness of the province and the concern about how much time it could take getting from one highlight to another is a deterrent and can lead to otherwise interested prospects simply switching off.

## 1.11 Germany – The Appeal of Canada

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- ◆ What Germans like most about Canada is the ability to experience original, authentic nature, unlike in Germany where as one respondent remarked:
  - ◆ ***“Every tree is numbered”***
- ◆ They love getting out into the country and feeling the sense of freedom, vastness and clean air. A significant minority wants soft adventure, but the majority simply desires to “get out there” and feel and observe the natural environment.
  - ◆ ***“Germans need a wide landscape. Space is part of the people’s personality...we have very limited recreational opportunities***
- ◆ As the trade expressed it, in Germany there are:
  - ◆ No useable sea sides
  - ◆ No vistas without civilization
  - ◆ A lot of buildings and structures
  - ◆ A crowded feeling
  - ◆ Rules, regulations, and formality
  - ◆ ***“When you go away for the weekend, you can leave your home and you are stuck on the autobahn for hours—two days is too short.”***
  - ◆ ***“In Europe, everyone is placed very close to each other. It is crowded, and there is no silence.”***
  - ◆ ***“At the camp sites there are a lot of restrictions. Everyone is very close to each other and we have to share one campfire. We are not allowed to have our own.”***
- ◆ It is not surprising that the notion of authentic wilderness lodges, B&B’s and motor home travel are popular visions for Canada because they permit the traveller to feel somewhat emancipated from modern civilization.

## 1.12 Germany – The Barriers To Canada

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- ◆ A fear of many prospective German travellers is that the nature focus of the Canadian image may be too singular – too concentrated on one type of experience.
- ◆ On vacation Germans also require quality, comfort and luxury which often necessitate an element of city life.
- ◆ To them, a well rounded vacation must include an opportunity to experience the culture and the local lifestyle.
- ◆ A key barrier to more travel to Canada, then, is:
  - ◆ **A lack of awareness that Canada can be a highly interesting, rewarding and diverse vacation experience, rooted in nature, but balanced by urban activities and culture.**
- ◆ It is this juxtaposition that keeps the second time plus traveller to Canada coming back, according to agents:
  - ◆ *“Where else in the world can you get exposure to such pure and untouched nature and then find a large city down the road”*
- ◆ However, while it is important to reassure travellers of good restaurants, accommodation and social interaction, they still need to know what is **unique** about Canada beyond spectacular nature.
  - ◆ This can include aboriginal culture experiences, driving in a unique natural setting, polar bear viewing, dog sledding, etc.

### 1.13 Germany – The Ideal Positioning

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- ◆ To broaden the appeal of Canada, the country must be represented as a balance of nature plus--
  - ◆ Unique cultural experiences
  - ◆ An inspirational, authentic way of life
  - ◆ The amenities of an urban environment
- ◆ Few countries can provide the juxtaposition of nature and an urban environment in the same place.
- ◆ As the trade expressed, all in one area, Canada can provide:
  - ◆ ***“Pure nature, unique culture and interesting cities.”***

## **1.14 Germany – Implications For British Columbia**

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British Columbia's incredible, authentic nature is the primary attraction for German travelers. However, those experiences can be meaningfully enhanced by folding into the itinerary cultural attractions such as aboriginal experiences.

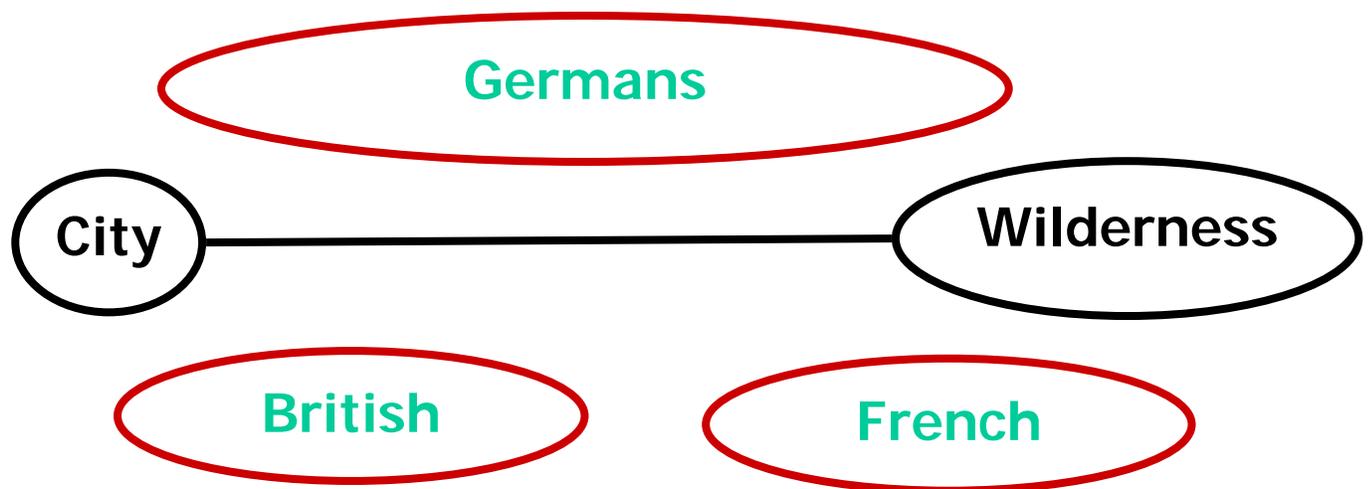
There are plenty of itineraries that appeal to the Germans, as Section 4 elaborates. A side trip to Tofino for example was singled out by some as particularly appealing because it combines great nature opportunities, whether observational only or soft adventure, with cultural attractions such as native art galleries.

As with other European markets, it is important to emphasize how easy it is to "get out into wilderness" yet enjoy the comforts and security of an urban setting as required.

## 1.15 Canada's Image: Summary

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- ◆ In summary, the unique city/wilderness positioning in **concept** is highly desirable and a driver for all three countries.
- ◆ However, how each **behaves** and acts upon it is different:
  - ◆ The British are more tentative with wild nature and
  - ◆ Germans take full advantage of the two extremes
  - ◆ The French are more driven by nature in combination with rustic life.



## 1.15 Canada's Image: Summary

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### 1. Positioning Pitfalls to Avoid

#### DO's

- ◆ Demonstrate vibrant cities on the edge of nature
- ◆ Visitors can enjoy both outdoor experiences and urban comforts virtually on the same day
- ◆ Feature unique nature experiences on one hand (e.g., icons, plus snowmobiling, dog sledding, openness, vistas, etc.)
- ◆ Feature unique cultural experiences (e.g., aboriginal, Canadian urban culture, meeting locals, log cabins, B&B's, etc.)
- ◆ Re-enforce the availability of comfort (e.g., good food, accommodation, socializing, etc.)

#### DONT's

- ◆ Overly emphasize Canadian cities
  - ◆ Too much like 1,000's of other cities around the world
  - ◆ For the French and Germans treat them as gateways. Both want to get away from cities
- ◆ Show too much remote wilderness
  - ◆ Europeans are intimidated by remoteness, bears – too scary.
- ◆ Use images that would be considered cliché—not unique to Canada

## **Section 2: British Columbia Trip Characteristics**

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## 2.1 Regions Visited

Half of all European visitors to British Columbia also visited Alberta, so the combination is very common but not by any means an essential for these visitors.

The French who travel to the West typically include Ontario and Quebec in their itineraries.

In contrast, the British and Germans are much more likely to be destined to the West exclusively, bypassing Eastern Canada (62% of U.K. and 38% of German visitors).

	<b><u>Among Past 3 Years Visitors to B.C.</u></b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(401) %</b>	<b>(349) %</b>	<b>(122) %</b>
<b><u>Other Canadian Regions Visited</u></b>			
<b><u>Western Canada (net)</u></b>	<b><u>100</u></b>	<b><u>100</u></b>	<b><u>100</u></b>
British Columbia	100	100	100
Alberta	54	56	45
Saskatchewan	11	14	16
Manitoba	9	12	18
Yukon/NWT/Nunavut	23	26	28
<b><u>Eastern Canada (net)</u></b>	<b><u>38</u></b>	<b>62</b>	<b>83</b>
Ontario	33	49	68
Quebec	19	37	72
Atlantic	13	26	41
Nova Scotia	9	14	26
Newfoundland/Labrador	8	17	29
PEI	8	11	20
New Brunswick	6	8	17

Source: Quantitative Survey Q. 8b

## 2.2 Duration of Trip

---

The typical length of stay in B.C. is about one week (6 to 9 nights).

This constitutes just over half of all nights in Canada by the U.K. and German visitors, but under half for the French.

	<b><u>Among Past 3 Years Visitors to B.C.</u></b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(401)</b>	<b>(349)</b>	<b>(122)</b>
	<b>%</b>	<b>%</b>	<b>%</b>
<b><u>Duration (Avg)</u></b>			
<u>Total nights on trip</u>	<u>19.7</u>	<u>24.9</u>	<u>21.2</u>
Nights in Canada	14.7	16.8	14.5
Nights in British Columbia	8.0	8.6	6.3
<b><u>Nights in Province</u></b>			
British Columbia	8.0	8.6	6.3
Alberta	3.1	2.9	1.3
Manitoba	0.1	0.3	0.3
Yukon	0.2	0.6	0.1
Ontario	2.1	1.9	1.7
Quebec	0.6	0.9	3.4
Atlantic	0.5	1.0	0.8
Other	0.5	0.7	0.7
<b>Total In Canada</b>	<b>15.1</b>	<b>16.8</b>	<b>14.5</b>

Source: Quantitative Survey Q.10d

## 2.3 Month of Travel

---

July to September is the most popular season of travel, followed by the Spring (April to June).

	<b><u>Among Past 3 Years Visitors to B.C.</u></b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(401)</b> %	<b>(349)</b> %	<b>(122)</b> %
<b><u>Month of Travel</u></b>			
January-March	14	11	17
April-June	32	29	28
July-September	<b>45</b>	<b>47</b>	<b>42</b>
October-December	10	13	13

Source: Quantitative Survey Q.11

## 2.4 FIT vs. Group

The vast majority of visitors to B.C. are travelling FIT, often without any type of package. Group travel is very low.

Most travel as a couple, less than 2 in 10 with children.

	<u>Among Past 3 Years Visitors to B.C.</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(401) %	(349) %	(122) %
<b><u>FIT vs. Group</u></b>			
Total FIT	84	93	86
FIT – benefit package	30	29	48
FIT – no package	54	64	39
<u>Total Group</u>	<u>16</u>	<u>7</u>	<u>14</u>
<b><u>FIT vs. Group</u></b>			
Immediate party only	84	93	86
Part of larger group	16	7	14
<b><u>Party Composition</u></b>			
Spouse/significant other	67	58	67
Friends	14	12	14
Travelled alone	14	18	9
Children	16	18	19
Parents	7	7	4
Organized group/club	3	2	1
Other relatives	9	4	10
Business associates/colleagues	1	4	2

Source: Quantitative Survey Q.12,16

## 2.5 Accommodation

On their overall Canadian trip, not necessarily the B.C. portion, city hotels are the most common accommodation choice.

U.K. and German travellers have a particular interest in resort hotels, the French (and Germans) in B&B's.

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b>	<b>Germany</b>	<b>France</b>
	<b>(401) %</b>	<b>(349) %</b>	<b>(122) %</b>
<b><u>Type of Accommodation</u></b>			
Mid-priced city hotel/motel	48	30	45
Luxury city hotel	24	23	36
Home of friend or relative	29	22	23
Budget city hotel	14	23	18
Resort hotel	30	26	9
Bed and breakfast	13	20	19
Authentic wilderness lodge	4	13	8
On a cruise ship	11	3	1
Cottage/cabin	9	10	10
Camping	4	8	10
On a farm	2	4	11
Guest ranch	3	7	5
Caravan/motor home	4	11	4
Other	6	3	3

Source: Quantitative Survey Q.18

## 2.6 Expenditure for Trip

Germans are likely to spend a little more on their trip to Canada than either U.K. or French travellers. However, it is due mainly to their longer duration, discussed in Section 2.2.

The British are most satisfied with value for money, the Germans and French less complimentary. However, virtually all would recommend Canada to others.

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b>	<b>Germany</b>	<b>France</b>
	<b>(401)</b>	<b>(349)</b>	<b>(122)</b>
	<b>%</b>	<b>%</b>	<b>%</b>
<b><u>Trip Expenditure</u></b>	<b><u>(£)</u></b>	<b><u>Error! Not a valid link.</u></b>	<b><u>Error! Not a valid link.</u></b>
Under 2,000	27	10	17
2,000-<4,000	28	24	31
4,000-<6,000	22	27	22
6,000-<8,000	14	14	9
8,000+	10	24	21
<b>Mean</b>	<b>£4,200</b>	<b>€6,600</b>	<b>€5,800</b>
<b><u>Value for Money</u></b>			
Excellent value	44	18	27
Very good value	36	37	36
Good value	17	39	32
Fair value	2	6	6
Poor value	1	1	-
<b><u>Recommended to Others</u></b>			
Definitely will	65	66	61
Very likely	27	26	34
Somewhat likely	7	8	5
Not likely	1	1	-

Source: Quantitative Survey Q.19b, c, d

## 2.7 Purpose of Trip

Although natural scenery is the most important motivation for a trip to Canada, note how experiencing local culture, interacting with people and seeing new places are also very important.

This confirms the importance of projecting a balanced vacation concept, as discussed earlier.

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b> <b>(401)</b> <b>%</b>	<b>Germany</b> <b>(349)</b> <b>%</b>	<b>France</b> <b>(122)</b> <b>%</b>
<b>Purpose of Trip – All</b>			
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	79	82	79
To see new places	61	40	48
To experience local culture	42	45	40
To interact with the local people	42	45	57
To relax, unwind and decompress	40	28	34
To visit historic sites, museums, or galleries	36	39	35
To realize a long term dream	30	30	44
To visit friends and relatives	42	32	31
To visit protected areas, including nature reserve, regional or national parks	47	55	57
To view aboriginal sites and events	11	19	26
To see and watch wildlife	44	44	43
To go shopping	24	27	30
To experience big cities in another county	23	30	27
To be together as a family	21	13	20
Low rates, good deals, and discounts	15	9	9
To participate in outdoor activities	21	24	16
For entertainment and nightlife	16	13	16
To attend festivals and/or events	10	11	22
A trip that combined business with pleasure	6	14	15
Honeymoon	6	4	10
To visit a spa, health centre, or hot springs	8	7	8
To go downhill skiing or snowboarding	12	5	11
Other reason	4	3	3

Source: Quantitative survey Q.9a

## 2.8 Activities Participated In – Top Ten

Viewing mountains is the number one activity for Europeans visiting British Columbia. However, also in the top ten are visiting small towns, taking city tours and getting to know the local inhabitants. These all support the importance of positioning Canada and British Columbia as an experience that includes, but reaches well beyond, beautiful nature.

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b>	<b>Germany</b>	<b>France</b>
	<b>(401)</b> %	<b>(349)</b> %	<b>(122)</b> %
<b><u>Activities Participated In – Top Ten</u></b>			
Viewing mountains	88	78	80
Viewing rivers or waterfalls	83	79	81
Visiting small towns	74	77	73
Taking city tours	64	84	85
Observing wildlife in their natural environment	74	70	73
Visiting places of historical interest	69	73	71
Visiting wilderness areas	70	71	78
Taking nature tours	48	85	79
Getting to know the local inhabitants	51	69	80
Seeing beautiful beaches and coastlines	56	63	63

## 2.8 Activities Participated In – Also Popular

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b><u>UK</u></b> <b>(401)</b> <b>%</b>	<b><u>Germany</u></b> <b>(349)</b> <b>%</b>	<b><u>France</u></b> <b>(122)</b> <b>%</b>
<b><u>Activities Participated In – Also Popular</u></b>			
Canoeing/kayaking/boating	21	35	36
Attending festivals or fairs	29	34	52
Staying at a luxury resort	24	26	25
Cycling	16	21	38
Taking wine/culinary tour	16	20	31
Taking a rail tour	30	29	30
Visiting casinos	11	19	29
Studying English	n/a	34	35
Visiting a spa	22	21	29
Whale watching	36	45	43
Viewing autumn leaves	21	35	33
Sport fishing	11	16	30
Attending professional sporting events	17	16	29
Camping in a natural setting	17	22	20
Trail riding on horseback	12	26	25
Visiting hotspots	27	40	25
Viewing glaciers	48	54	56
Viewing Aurora Borealis (Northern Lights)	11	18	32
Golfing	8	15	18
Dog sledding	8	14	32
Attending rodeos	10	18	25
Downhill skiing or snowboarding	14	14	24
Heli/cat skiing	6	13	25
Hunting	6	10	18
Fine dining	60	47	74
Seeing old architecture	52	50	65
Visiting museums or art galleries	55	49	67
Sunbathing or other beach activities	19	31	40
Visiting world heritage sites	48	32	57
Taking a cruise	26	12	56
Trekking in a nature area	43	73	60
Taking a garden or flower tour	31	55	51
Aboriginal cultural experiences, celebrations, and attractions	28	33	44
Seeing modern architecture	47	39	69
Visiting friends or relatives	50	47	56
Attending theatres, clubs or shows	36	41	39

Source: Quantitative Survey Q.19a

## 2.9 Trip Inspiration

As many as 54% of the British visitors have close relatives or friends in Canada, as do 42% of German and 52% of French travellers.

Clearly, friends and relatives are key sources of inspiration for visitors to Canada, whether from the U.K., Germany or France.

Note how few refer to the travel trade as a source of inspiration. Their declining role in the choice of destinations is discussed in detail in Section 7.

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b>	<b>Germany</b>	<b>France</b>
	<b>(401) %</b>	<b>(349) %</b>	<b>(122) %</b>
<b>All Source of Inspiration for Trip Planning</b>			
Friend or relative	57	42	52
Television travel shows	11	28	26
The internet	19	25	29
Destination travel guide	17	26	19
Saw a film on destination	8	17	12
Travel agent/tour operator	10	7	12
Story in magazine or newspaper	10	16	18
Other television show	5	7	10
Business reasons	5	7	3
Consumer travel trade show	4	2	7
Direct mail or email advertising	4	4	7
A news story	5	5	18
Celebrity travelled there	3	4	3
<b>Close Friends/Relatives in Canada</b>			
Yes	54	37	40
No	46	62	59

Source: Quantitative Survey Q.14a, 28

## 2.10 Horizons

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The planning lead-time is much longer for U.K. and German travellers visiting British Columbia ( both planning about 10 months in advance) than it is for the French (6 months).

Booking tends to be 3 to 5 months in advance.

	<b><u>Among Past 3 Years Visitors to B.C.</u></b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(401)</b> %	<b>(349)</b> %	<b>(122)</b> %
<b><u>Planning Horizons</u></b>			
Average # of weeks	42.3	41.8	25.0
<b><u>Booking Horizons</u></b>			
Average # of weeks	21.0	15.0	12.8

Source: Quantitative Survey Q.15a, b

## 2.11 How Trip Was Booked

Half of U.K. and French travellers book direct with an airline.

Agents handle only 5 to 6 bookings out of 10.

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b>	<b>Germany</b>	<b>France</b>
	<b>(401) %</b>	<b>(349) %</b>	<b>(122) %</b>
<b><u>How Trip Was Booked</u></b>			
<u>Booked through a travel agent/package provider (net)</u>	<u>51</u>	<u>60</u>	<u>57</u>
In person	27	42	33
Online	14	14	15
Via phone	14	6	10
<u>Airline (net)</u>	<u>45</u>	<u>31</u>	<u>47</u>
Via their website	41	24	31
Via phone, email or in person	7	8	16
<u>Hotel (net)</u>	<u>24</u>	<u>17</u>	<u>21</u>
Via their website	21	13	21
Via phone	7	5	4
Other online travel supplier	9	4	6
Other	5	5	4
<b>Online Booking (net)</b>	<b>85</b>	<b>55</b>	<b>73</b>

Source: Quantitative Survey Q.15c

## 2.12 Traveller Profile

Visitors from Germany and France tend to be relatively young (41% to 60% under 40). U.K. travellers skew much older (23% retired).

	<b>Among Past 3 Years Visitors to B.C.</b>		
	<b>UK</b> <b>(401)</b> <b>%</b>	<b>Germany</b> <b>(349)</b> <b>%</b>	<b>France</b> <b>(122)</b> <b>%</b>
<b>Age</b>			
18-29	17	23	27
30-39	24	26	33
40-49	15	23	23
50-59	23	10	10
60+	21	18	7
<b>Gender</b>			
Male	47	55	53
Female	53	45	47
<b>Marital Status</b>			
Married/living together/de-facto	78	66	78
Single	14	23	17
Divorced/widowed/separated	7	10	4
<b>Household Composition</b>			
Adults only	71	68	44
With children < 18	29	32	56
<b>Occupation</b>			
Total employed	63	70	73
Senior unskilled manual worker	2	4	1
Skilled manual worker	5	9	3
Supervisory or clerical/junior managerial/professional/administrative	18	15	17
Intermediate managerial / professional /administrative	19	13	21
Higher managerial / professional/ administrative	10	10	18
Self employed	6	14	11
Employed part time	4	5	1
Student	6	11	6
Housewife/husband	3	3	2
Retired/semi –retired	23	13	7
Other	1	3	12

Source: Quantitative Survey Q.2, 3a, 29-32 (basic data)

**Section 3: Ideal Trip to British Columbia**

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### 3.1 Ideal Trip to British Columbia

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Those who would include British Columbia on their ideal future trip to Canada prefer July to September and would remain in the country 2 weeks.

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500)</b> %	<b>(1304)</b> %	<b>(800)</b> %
<b><u>Ideal Next Trip</u></b>			
<b><u>Season</u></b>			
January-March	9	5	8
April-June	28	24	25
July-September	<b>49</b>	<b>62</b>	<b>48</b>
October-December	14	9	19
<b><u>Duration</u></b>			
# of nights (avg)	14.8	17.5	13.7

Source: Quantitative Survey Q.25

### 3.2 Provinces Likely to Visit

The ideal future trip to Canada where British Columbia is a preferred stop would also include other key provinces – Ontario and Quebec, in particular, as well as the U.S. The number planning to include Alberta is lower than current levels which probably reflects a lack of awareness. Once planning begins they see the logic of including nearby Alberta.

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500) %</b>	<b>(1304) %</b>	<b>(800) %</b>
<b><u>Provinces Likely to Visit</u></b>			
B.C.	100	100	100
Alberta	36	35	23
Saskatchewan	10	11	17
Manitoba	7	11	13
Yukon	10	23	21
North West Territories	12	19	24
Nunavut	6	9	15
Ontario	56	62	65
Quebec	39	53	82
Nova Scotia	17	11	24
Newfoundland and Labrador	15	23	34
PEI	10	10	18
New Brunswick	7	8	15
<b><u>Would Also Visit Overnight or Longer</u></b>			
USA	47	54	42
Other countries	11	17	9
Canada only	49	39	53

Source: Quantitative Survey Q.25

### 3.3 Type of Tour

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FIT would dominate, more often than not without any package.

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500) %</b>	<b>(1304) %</b>	<b>(800) %</b>
<b><u>Type of Tour</u></b>			
<u>Group Tour</u>	<u>14</u>	<u>19</u>	<u>22</u>
Prefer: All days organized	6	11	13
Many free days	8	8	9
<u>FIT (non-group)</u>	<u>86</u>	<u>81</u>	<u>78</u>
Prefer: Package	35	33	42
Non-Package	<u>51</u>	<u>47</u>	36

Source: Quantitative Survey Q.25

### 3.4 Transportation

---

Rail travel between centres is highly popular, at least in concept as they imagine their ideal trip. This is a clue that packages should focus on rail travel.

Renting a car is also a desire of the majority.

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500) %</b>	<b>(1304) %</b>	<b>(800) %</b>
<b><u>Transportation Between Centres</u></b>			
Rental car	65	81	79
Air	75	68	79
Rail	76	57	65
Motor coach	34	43	54
Private car	22	17	28
Motor home/camper	22	38	14

Source: Quantitative Survey Q.25

### 3.5 Accommodation

Canadian resorts have real interest to the British and Germans. Germans, in particular, also like the idea of staying on a ranch, although not a farm.

The French aspire to authentic wilderness lodges and B&B's.

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500) %</b>	<b>(1304) %</b>	<b>(800) %</b>
<b><u>Accommodation</u></b>			
City hotel	41	35	33
Authentic wilderness cabin or lodge	18	18	32
Bed and Breakfast	15	27	29
Lakeside resort	39	38	24
On a ranch	8	23	20
On a farm	3	2	11
Home of friend or relative	9	8	7
Seaside resort	21	27	14
Mountain resort	44	16	12
Canadian Spa	6	6	9
Coastal cruise ship	8	3	5
Ski resort	10	4	3
Caravan/motor home	5	13	2
Camping	2	3	1

Source: Quantitative Survey Q.25

### 3.6 Activities – Top Ten

The top ten desired activities in Canada and/or British Columbia include getting to know local people, experiencing their towns, cities and culture.

Again, the breadth of their interests – nature, cities, people and culture – are a solid reminder of the importance of offering and communicating well balanced products.

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500) %</b>	<b>(1304) %</b>	<b>(800) %</b>
<b><u>Activities – Top Ten</u></b>			
Viewing rivers or waterfalls	92	94	97
Getting to know the local inhabitants	72	84	95
Experiencing French Canadian culture and cuisine	73	83	94
Taking nature tours	69	93	92
Visiting small towns	81	85	93
Taking city tours	74	92	93
Visiting wilderness areas	79	88	90
Observing wildlife in their natural environment	85	86	90
Visiting places of historical interest	81	86	91
Viewing mountains	91	85	88

### 3.6 Activities – Also Popular

	<b>Among Those Who Would Include B.C. On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(1500) %</b>	<b>(1304) %</b>	<b>(800) %</b>
<b><u>Activities – Also Popular</u></b>			
Attending rodeos	32	40	44
Cycling	27	35	41
Trail riding on horseback	34	38	43
Study English	n/a	50	37
Visiting friends or relatives	32	24	30
Sports fishing	12	14	25
Downhill skiing or snowboarding	23	16	26
Heli/cat skiing	14	14	29
Visiting casinos	17	16	21
Golfing	11	10	11
Hunting	8	8	9
Aboriginal cultural experiences, celebrations, and attractions	48	75	86
Visiting world heritage sites	74	71	89
Viewing Aurora Borealis (Northern Lights)	64	65	82
Trekking in a nature area	55	79	79
Whale watching	70	68	80
Seeing old architecture	70	70	81
Dog sledding	29	44	80
Viewing autumn leaves	48	59	77
Seeing beautiful beaches and coastlines	76	83	73
Taking a garden or flower tour	32	67	65
Attending festivals or fairs	57	60	67
Seeing modern architecture	54	56	67
Snowmobiling	27	37	66
Visiting museums or art galleries	66	60	66
Taking a wine/culinary tour	45	36	62
Taking a rail tour	62	55	54
Visiting a spa	39	32	47
Attending theatres, clubs or shows	53	51	67
Canoeing/kayaking/boating	30	44	49
Taking a cruise	39	21	49

Source: Quantitative Survey Q.25

## **Section 4: Product Development Forums**

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## 4.1 Introduction – Online Product Development Forums

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This section reports on a qualitative study conducted online among tourists from the United Kingdom, France and Germany who fell into two different categories:

- Those who have visited Canada before, in the recent past
- Those who declared a strong interest in visiting Canada in the near future

The principal objectives of this phase were to formulate hypotheses bearing on the following issues:-

- Hope and expectations of tourists coming over to Canada
- What they appreciate the most, in reality and in prospect
- The sights, places, activities that have the greatest magnetism for them
- What kinds of specific itinerary might be developed to appeal to them

Each region addressed in the forums was focused on in a separate section, revealed day by day to the participants. The forum started with an overview of Canada as a destination, providing a holistic picture of travel to Canada.

## 4.2 General British Product Discussion

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The vast majority of UK travelers to Canada desire a “modular” experience with a vast range of “plug and play” tourism products. In part, this derives from the extensive VFR travel bias of many UK tourists who “must” spend some time visiting their friends and family even if it requires a second plane flight to reach their ultimate destination. In other cases, it derives from strong interest driven tourism (e.g. skiing).

### *On Itineraries and Location*

This modular experience, and the desire for plug and play products, creates a situation where itineraries and itinerary planners become crucial. Of key concern to many of the respondents was the time and distances involved, and placing product locations into the “grand scheme of things”.

*The sites (provided to us for review) appeared to open my horizon to the various parts and what is available. However I found it difficult to make the links between each part-- for instance how far it would be from Toronto to Manitoba, or Niagara to Manitoba.*

*A route master map would be useful.*

*I found all the sites informative but lacking in-depth maps and distances.*

*I had real trouble finding where places were 'in the grand scheme of things' Google maps and Google earth links would be very useful.*

Even respondents who had been to Canada before have great difficulty with how large it is. Respondents who had **not** been to Canada previously consistently underestimate the size of both the country and various provinces by a factor of four or more and this, in turn, led to a lot of concern over time and distance between destinations.

## 4.2 General British Product Discussion

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The deployment of some type of geo-tagging system, whether it be using Google Maps Google Earth<sup>1</sup>, PlanetEye (planeteye.com) or some similar system, would go a long way towards alleviating some of these concerns. Another solution which would also be useful would be a simple mileage chart or drop down menu with different transport options available and information links.<sup>2</sup> As one respondent noted:

*I would like to see a detailed map of the area where you can also put information in between towns and it gives you options on how you might get there and how long it would take via each mode of transport. I would like to be able to click on point A and then point B my next destination and it also shows what is "in between" in terms of historical stuff, entertainment, sports etc.*

One reason why both itinerary modularity and route planners are both so important for the UK traveler stems from their general desire to be able to "travel about". In discussing detailed plans for individual areas, many respondents mentioned renting cars or motor homes and just "cruising" or taking road trips. Frequently, they would mention "asking the locals" for suggestions.

British travelers are, in many ways, notorious for choosing their own paths and changing them on a whim. This is actually a very well established tradition amongst middle-class British tourists dating back over 100 years, and it appears to be the internalized view of what is the "correct" way to travel. Thus, while they will wish to see the iconic sites, they also want the freedom to modify their itineraries "on the fly".

### ***On "Word of Mouth"***

The vast majority of UK respondents choose Canada as a result of recommendations from friends and relatives (whether or not they happen to live in Canada). Barring the existence of personal recommendations from friends and relatives, they are, on the whole, quite comfortable with **virtual** recommendations.

*I'm a great believer of word of mouth and recommendations especially from people who travel with their children.*

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<sup>1</sup> As a note, Nova Scotia's official Tourism web site has already produced a Google Earth .kml file.

<sup>2</sup> Ideally, such a solution would use interchangeable data structures and could be implemented at the local level while drawing from a national level database, allowing local sites to offer "national level" information. While UK respondents are nowhere near as schedule sensitive as most Asian visitors, such a system would serve both.

## 4.2 General British Product Discussion

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*Links to reputable sites like Trip Advisor, Time Out etc would enhance my 'trust' in tourist board sites definitely. Testimonies from previous visitors can look a bit cheesy - impartial reviews are preferable definitely.*

*I'm a big fan of online communities for up to the minute information and all round discussion so I would really welcome a link to ski forums in the region I was thinking of going.*

*Why not have a few recommendations from tourists that have used the website to plan their trip? Post comments, suggestions and the route they took. It would be really great if I could log on to a site and say I want to fly to Vancouver, I've got 10 days and want to see as much as possible. Work out an itinerary for me with distance, times and what to see.*

While this is not the place to discuss the full requirements for online communities, there are some points that need to be addressed.<sup>3</sup> First, several fairly trusted online “communities” already exist (e.g. TripAdvisor). Second, attempts to build and host a highly moderated online community usually fail since the posts tend to be viewed with a lot of skepticism.<sup>4</sup> The optimal solution for tourism providers is to monitor key online communities and act as problem solvers and information sources.

Several functional areas and interests crossed most provinces, and it is worth considering them in some detail.

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<sup>3</sup> A full discussion of the structures of online communities of various types can be found in Tyrrell, Marc W.D. Hunting and Gathering in the Early Silicon Age: Cyberspace, Jobs and the Reformulation of Organization Culture. In *The Handbook of Organizational Culture and Climate*, Ashkanasy, Wilderom, and Peterson (eds.), Sage Publications, 2000.

<sup>4</sup> “highly moderated” communities refer to online discussion boards where the content is usually pruned very heavily by the moderators. In general, the moderators have a tendency to eliminate anything “negative”, hence the general view of them as untrustworthy.

## 4.2 General British Product Discussion

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### ***On Skiing***

Skiing and winter sports have been the subject of intense advertising in the UK. This has, in part, helped to maintain the image of Canada as a winter nation (Canadian winters have been iconic in the UK for at least 100 years). That said, in comparison with the EU, Canada has an excellent competitive advantage in the ski product area. As one respondent cogently noted, Canada's advantages are:

- *Less busy - Europe has a relatively small high quality ski area to service a large, heavily populated land mass so everything seems to be busier - longer queues at lifts, etc. Waiting in an enormous line tends to detract from a good skiing day (especially given that the residents of certain European countries don't seem to believe in queuing!!)*
- *Better Snow - I'm a snowboarder so there's nothing better than powder and on the whole I'd say that somewhere like Sunshine has a much more reliable supply of it than most of the European resorts I've visited.*
- *Cost - I think that you get better value for money on a N. American trip. Europe seems to be very expensive and the accommodation is not always great. It's only the flight to/from Canada that makes Europe competitive for me.*
- *Customer Service - In my experience, Canada is more service orientated and the people friendlier than in most European resorts. There's also the bonus of being able to speak English when dealing with issues or problems but you can still practice your French if you'd like.*

The key blockage is travel time/cost from the UK. Some of this blockage may be dissolved if and/or when an open skies agreement is signed with the EU – at the minimum, flight options will increase and costs will probably decrease somewhat due to increased competition.

### ***On Food***

While mentioned primarily in reference to the Atlantic provinces, there are significant opportunities in this area in all regions given the development in Canada of multi-ethnic fusion cuisine as well as solidly established regional cuisines.

The UK forums identified two key barriers based on cultural perceptions: the image of Canada as a winter nation (see above) and the reticence of Canadians to “push ourselves”.

## 4.2 General British Product Discussion

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### *Not pushed enough...*

Many respondents feel that Canada does not push itself enough.

*I don't think that Canada sings its praises enough. There is so much going on there and loads to shout about.*

*I get the feeling that Canadians are very proud of their country, and with good reason. The country has so much to offer it's unreal. They need to shout about it all a bit more - are they a bit like the British in that respect, good at playing down their good points?*

This is quite a sophisticated observation, especially the part about it being part of our British heritage. This stands in stark contrast to the UK view of Americans as “too pushy” and the Australians as “loud but civilized”: we are, in effect, neither loud enough nor pushy enough.<sup>5</sup>

### **Options**

The key conversion problem is in the final “hook” to get UK residents seriously planning a vacation to Canada or, in other words, to convert Canada from a “dream destination” to a real destination. The participants in the forums noted this when they talked about a) how little they knew about Canada and, especially, the vast variety of tourist opportunities here and b) suggested that we “push ourselves” more. Exactly **how** Canada should do this was only suggested by one participant.

*So I think Canada speaks for itself, once you're there, it's just getting people there that's the trick. How about a cheap airfare promotion, that would encourage people to visit and they could then act as mini-ambassadors 'cos they're bound to love it...*

This particular suggestion is, at its core, possibly the ultimate viral marketing campaign especially since **all** of the online forum participants believe that the **experience** of Canada is the best selling point **for** Canada.

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<sup>5</sup> The reasons behind these stereotypes are complex, but go back to the respective histories of the Anglo Complex countries with the UK and are part of the sub-conscious cultural baggage of the UK.

## 4.2 General British Product Discussion

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### *Creating Customers rather than Consumers*

Ultimately, the thrust of the CTC Canada: Keep Exploring campaign is to create tourism customers rather than tourist product consumers: we both want and need people to keep coming back to Canada and to establish Canada as a customary vacation destination. We already know that Canada is one of the top dream destinations and, at the same time, that one of the most potent conversion factors is VFR. This needs to be our leverage point – we need to create opportunities for potential UK visitors to come to Canada and sell themselves (along with their friends and family) on Canada.

### **How can this be done?**

We would have to recommend a matrix viral marketing campaign, containing both regions (including city visit “getaways”) and functional areas, such as skiing and wine tasting. Ideally, the campaigns could be co-branded (and co-funded).

**Example 1:** one participant noted that the line-ups for ski lifts in the EU were quite long in comparison with Whistler and Banff. Even worse, the coffee that was available was vastly overpriced (3€ or ~\$4.5 in France). A “Tired of the line-ups?” campaign, complete with flyers and free, Canadian coffee along with a chance to win a ski trip to Canada could prove very effective.

**Example 2:** several participants were quite interested in Canadian wines and wanted to know if they were available in the UK. A combined export push supported by DFAIT, the wine industry and the CTC, coupled with stories in publications, wine tasting events, and one or more regional wine tour vacation trips would enhance both the knowledge of Canada’s wine growing regions and the country in general.

### 4.3 British Columbia Specifics for the U.K.

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British Columbia is one of the best know destinations in Canada, and has three iconic destinations: Vancouver, Whistler and the Rocky Mountaineer. Despite this, general knowledge of BC is quite limited even amongst respondents who had previously travelled there. Furthermore, BC is frequently (~50%) linked with Alberta, i.e. Calgary, Banff, Lake Louise as a fly-drive option.

General reactions to the website were quite positive and, even amongst people who had been to BC before; they were, on the whole, impressed with the variety of options available. The reaction to available activities amongst the non-visitors was even more extreme

*Well, I've overcome the website problems<sup>[6]</sup> and have thoroughly familiarized myself with British Columbia and what it has to offer - pretty much everything! It's more a case of having to scrub all the things I don't want to do on my Canadian odyssey, so that I am just left with the core of what I'd really love to do.*

Throughout their discussions of BC, the respondents showed a fairly consistent underlying perceptual bias towards "Civilized Nature" – i.e. clean cities with polite people living close to vast natural beauty. Concerns were primarily with travel times, medical facilities (especially important amongst older visitors), general comfort, authenticity, and getting off the "beaten trail". These two final points need some expansion.

Many of the respondents were interested in accessing "nature" and outdoor activities (the British have a long history of this, especially hiking, intimately tied into the development of tourism in England). They do not, however, have the cultural or social background that gives them the survival skills for "real" nature. As a result, while they have a great desire to "contact nature" in an "authentic" manner, they really wouldn't know how to handle it by themselves. As such, positive interactions with "nature" need to have a solid safety net, including guides and "decent" accommodation and food.

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<sup>6</sup> These "problems" appear to have been at the respondents end.

### 4.3 British Columbia Specifics for U.K.

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#### Product Discussion

The three iconic destinations for BC are Vancouver, Whistler and the Rocky Mountaineer. These destinations enjoy an excellent reputation as “must see” icons, although there is some variance on them. Vancouver is primarily a rest / shopping destination that acts as a gateway to either Whistler (for the Ski traveler) or the Rocky Mountaineer (for the Civilized Nature traveler).

Many different product options were mentioned, although the two key ones were a Vancouver Islands excursion (2-3 days) and a car rental road trip (4-7 days). Excursions to the wine region were not that well known, probably due to a lack of general knowledge of the BC wine industry in the UK market.

Despite different products being mentioned (and web resources being provided with the information), the respondents were, on the whole, quite ignorant of the actual products available, outside of the icons. This indicates that the best way to “sell” BC products is to establish associations between products (old or new) and existing icons.

For example, Whistler is an icon of skiing and snowboarding, but it is only one of many. Other products can be linked with Whistler and defined in the UK market by their “distance” (in terms of price, quality of snow, accommodation, technical difficulty, etc.) from Whistler in order to play to different need states (e.g. skiing / boarding community status, social prestige in terms of exclusivity, etc.).

Roughly half of the respondents talked about renting a car and driving to various places to see “nature”. In addition to concerns about distance and time, some people expressed concerns about accommodation quality, available events, etc. As one respondent noted

*To be honest I love this stuff but if time is short and anything less than 3 weeks is pretty short there's a feeling that you don't want to waste any time taking wrong turns and heading to places that are a bit of a waste of time. The worst feeling is spending 3 days at an OK place to find out there's an amazing place 10 miles down the road.*

This concern highlights one of the most important roles for detailed geographical/ product information either in some form of geo-tagging itinerary generator or in print form.

### 4.3 British Columbia Specifics for U.K.

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The following itinerary created by one respondent highlights many of these points:

Flight from London to Calgary (1 night).

Rent car (4 x 4) drive to Banff – selected hotel after arriving.

- Walking tour (looking at “scenery”)
- Driving tour (looking at “scenery”)

Drive through Rockies

- Lake Louise (1 night)
- Columbia Icefields.
- Jasper (1 night)

Either

- Drive to Whistler (3 nights) then drive to Vancouver, or
- Kamloops and take Rocky Mountaineer to Vancouver (2 nights)

From Vancouver fly to Victoria (2 nights)

Fly back to Vancouver to shop and then back to London.

The desirability of road trips also points towards a class of products that involve experiencing nature with a safety net. In the case of BC, many of these are well covered on the web site and it is more a matter of bringing them out. It is interesting to note that Hiking, which is a British cultural icon, does not have its own heading in the Natural Sights, Parks & Wildlife page,<sup>7</sup> even though there is a Hiking page available on the site.<sup>8</sup> We would recommend that it also be listed on the Natural Sights, Parks & Wildlife page.

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<sup>7</sup> <http://www.hellobc.com/en-CA/SightsActivitiesEvents/NaturalSightsParksWildlife/BritishColumbia.htm>

<sup>8</sup> <http://www.hellobc.com/en-CA/SightsActivitiesEvents/AirLandActivities/Hiking/BritishColumbia.htm?Lev1=1>

### 4.3 British Columbia Specifics for U.K.

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Vancouver Island is an interesting case of an “add-on” that is very poorly understood by the UK respondents. In answer to a question about what people knew about what was available on the Island, the response were disappointing, but illustrative of the problem of non-iconic destinations.

*Have heard it mentioned by people and of course its accessible from Vancouver, know its got skiing, but would have to look at the link to find out more about it.*

*Not a great deal to be honest, interest is purely based on recommendations, during which the word beautiful came up a lot. Having looked at the website I can see there's plenty of outdoor activities to do - whale watching, hiking, mountain biking, canoeing etc, which I'd enjoy.*

These responses indicate several things. First and foremost, they have “heard about it” from friends. Second, their immediate response is to go (or not) to the web site for details, but only after being asked. Once again, we can see that the problem is not with the products but, rather, with a) the respondents knowledge of the products and b) the “hook” to get them to travel there.

The likeliest “hook”, mentioned by several respondents, is a customizable 3-5 day excursion. Given the variety of existing products, the mild climate and the generally more “relaxed” pace, we would suggest that such an excursion use Victoria as the start/stop point and be aimed at the older travelers and/or those with young children. A start on such excursion packages has already been made by Tourism Victoria, but it would need to be expanded somewhat to include activities on the rest of the island.

#### 4.4 General French Product Discussion

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Planning tours and itineraries for the French tourist who is mainly Quebec-bound should probably allow for different levels of adventurousness: some of these people want to be more active, others less so. But all want to experience the intensity of the season (summer or winter); all want to feel they are getting closer to "nature", seeing creatures and vistas they would scarcely see in Europe.

One idea that would stem directly from this is the principle of offering a few days by a lake, in a cottage – preferably a log cabin with a fireplace. This could be summer or winter (preferably avoiding bug season). Those who are more soft adventure focused could skate or ski; others could snowshoe or simply watch. Everyone would probably want a ride on a dogsled. This is the kind of magical experience that delighted the French tourists who had been here:-

*"The "must-do" in winter is a week-end cottage! You go off for three days to a lakeside cottage. The lake is frozen over. On the program: trip across the lake, cross-country skiing, huge meals and chatting by the fireside... Happiness!"*

Within Quebec itself there was a lot of interest in going beyond just Montreal and Quebec City. For example:

- To the Gaspé (for fishing, scenery, climbing, Percé rock, Bonaventure Island, bird-watching)
- To Lac-St-Jean (passing by Tadoussac for whale-watching opportunities, a nature park, etc.)
- To the Laurentians , in particular to Mont Tremblant

Some particular experiences were well appreciated:

- Encounters with wild animals (raccoons, deer)
- Visiting a "cabane à sucre", joining in the singing and admiring the dancing
- Spa's which provide some outdoor contrasts in temperature
- The ice hotel, ice sculptures

#### 4.4 General French Product Discussion

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There were complimentary remarks about Montreal and Quebec City. But throughout there was greater emphasis on the huge expanses of natural beauty that Quebec offered. But it seems significant that particular aspects of each city that caught tourists' imagination were also linked closely to nature, e.g.:

- The Biodome in Montreal; the lookout on Mount Royal; the Botanical Gardens
- The terrace of the Château Frontenac where you can admire the curve of the St Lawrence while sipping a beer

The general implication here is that the major cities should be regarded as gateways or bases, not as ends in themselves.

Side-trips outside Quebec were mainly towards Niagara Falls, which is so famous it is hard to come to Canada without making time to get there at least once. Toronto is a convenient stopover on the way there or back: but the CN Tower had delighted more than one visitor. Ottawa was more like a day trip from Montreal. One respondent mentioned getting as far as Vancouver Island as part of an extended visit: in line with the importance of nature in Canada, the high point for her was a visit to Butchart Gardens.

One of the odd findings among both past and intending tourists to Quebec is that they knew little and did not seem to care much about Atlantic Canada. (This may be a by-product of having a small sample, but it seems important to note as a possibility.) While claiming to be "interested" in French influence in Quebec as part of North America, there was little sign of respondents applying the same curiosity to Acadian villages or to Louisburg. It may be that the French aspect of Quebec is here and now, whereas the Acadian side of Atlantic Canada is too much in the past.

In terms of itineraries then, extensions from Quebec might be more appealing to the West than to the East. To maximize appeal for French tourists the East-of-Quebec should probably be promoted in terms that correspond to feelings expressed when respondents actually looked at Atlantic Canada websites and were struck by:

- Nature and related activities as opposed to:-
- Pursuing French heritage

#### 4.4 General French Product Discussion

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That is to say, they were impressed by Gros Morne and by the Cabot Trail – for example:

*"Taking the Cabot Trail which displays the most attractive maritime track in the world, featuring forests, lakes, cliffs plunging into the sea: in the distance, whales, in the sky bald eagles."*

The same respondent went on to say that:

*"Sure it would be interesting to visit the historic sites where Canada was colonized by the French but going there just for that would not be the most important item for me."*

Wonderful scenery and the beauties of nature did it for him.

This is perhaps, then, the kind of introduction that an itinerary branching out from Quebec might take.

##### **Quebec → East - (2 weeks or 3)**

Arrive at Montreal: options for guided tours or independent visits (4-6 days)

Guided would include:

- Biodome and Botanical Gardens
- Mont Royal
- Old Montreal, Pointe-à-Callières
- Day-trip to Mont Tremblant – or Magog/Mont Orford
- Chalet experience

Transfer to Gaspé (2-4 days)

- Percé Rock, Bonaventure
- Mont Albert

Transfer to Sydney NS for Cabot Trail tour (2-4 days)

Return via Quebec City to Montreal

(A longer visit control involves an extension to Bay of Fundy (whale watching) and/or Gros Morne Park)

#### 4.4 General French Product Discussion

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##### Quebec → West - (2 weeks or 3)

Arrive at Montreal: (first section as Quebec → East)

Transfer to Ottawa/Hull (3-4 days)

- River Rouge (rafting) en route

- Museums

- Gatineau Park

Transfer to Toronto (3-4 days)

- CN Tower

Options:

- excursion to Grande River

- Niagara-on-the-Lake

- Toronto Islands, sailing

- Bruce Trail, hiking

Transfer to Niagara Falls (2 days)

Options for "more than just looking at it"

- Helicopter, Maid of the Mist, balloon, etc.

Return via boat through 1000 islands

Back to Montreal

(A longer visit could involve an extension to Collingwood, Georgian Bay; bird-watching at Point Pelee)

In each of the above suggestions, the driving consideration is to build on:

- What French tourists have told us they like (and have liked in Quebec)
- What they associate with Canada
- While drawing them towards a broader view of Canada than just Quebec
- Providing options, particularly
  - more active vs. less active
  - guided, organized vs. free-wheeling, independent

Each of them could work in summer or winter. The nature of the activities on offer (e.g. skating on the lake or swimming in it) obviously changes

## 4.5 British Columbia Specifics for France

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Outside Quebec, British Columbia is one of the best known destinations in Canada.

Despite this, general knowledge of BC is quite limited even amongst respondents who had previously travelled there.

It was very clear that even French tourists who had never given much thought to BC in the past were very impressed by what they saw on websites and what they heard about this part of Canada from others.

Vancouver formed a strong part of this attraction. But not just as a city: it was the position of the city, between the water and the mountains, with Stanley Park on one side, that seemed to capture the imagination. There was curiosity about Chinatown, Gastown and the contrast offered by a modern city in the midst of wild and varied scenery. But the focal point of interest was more often something like this:

*"Above all I imagine myself enjoying a trip that is basically concerned with sea activities: short cruises; meeting whales; beaches and diving."*

(FR1 – Previous visitor to Canada)

One of the obstacles to taking seriously a vacation in Western Canada was distance. It seemed a very long-haul, that would eat away a large chunk of available holiday time. There was also relatively more uncertainty among French tourists about distances between places worth seeing in BC, whereas they could picture the geography of the more travelled parts of Quebec fairly clearly. Not wanting to spend a lot of time in places and buses or even in hired cars, they sometimes urged tour operators to supply more details of how much inter-site travel time was required, for each day when there was an "organized" component. This was a particular concern among:

- The more active, adventurous and sports-oriented people
- Those who would be travelling with children

## 4.5 British Columbia Specifics for France

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Following are a list of things to see and do that particularly appealed in BC:

<p><b>Sports activities</b></p> <ul style="list-style-type: none"><li>➤ Walking tours ("real" trails, "not roads")</li><li>➤ Canoeing</li><li>➤ Skiing</li><li>➤ Snowmobiles</li><li>➤ Cycling</li><li>➤ Horseback riding</li></ul> <p><b>Animal watching</b></p> <ul style="list-style-type: none"><li>➤ Birds</li><li>➤ Orcas; other whales</li><li>➤ Bears</li><li>➤ Coyotes</li><li>➤ Moose</li><li>➤ Wapiti; elk; caribou</li></ul> <p><b>Vancouver City</b></p> <ul style="list-style-type: none"><li>➤ The old quarters</li><li>➤ Stanley Park</li><li>➤ Beaches</li><li>➤ Museums, galleries</li><li>➤ Grouse Mountain; Whistler</li><li>➤ Capilano Bridge</li><li>➤ Van Dusen Gardens</li></ul>	<p><b>Exploring, admiring scenery</b></p> <ul style="list-style-type: none"><li>➤ Vancouver Island</li><li>➤ Caribou Chilcotin</li><li>➤ Powell River</li><li>➤ Fjords</li><li>➤ Juan De Fuca Sraight</li><li>➤ Mount Revelstoke</li><li>➤ Garibaldi Park</li></ul> <p><b>Miscellaneous</b></p> <ul style="list-style-type: none"><li>➤ Rodeos</li><li>➤ Butchart Gardens</li><li>➤ Train ride through the Rockies</li></ul> <p><b>Other Cities</b></p> <ul style="list-style-type: none"><li>➤ Victoria</li><li>➤ Nanaimo (artists' colony)</li></ul>
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In many ways, what French tourists expected from BC was an extension of what they knew or imagined in Quebec: wide open spaces, the feeling of being free to roam (versus European constraints), seeing animals in their natural habitat, getting closer to nature and enjoying being active, with varying degrees of adventure.

## 4.5 British Columbia Specifics for France

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When it came to suggesting itineraries, several combined BC and Alberta. There were wonderful things they had never thought about in Alberta too (Banff, Jasper, Lake Louise). Being adjacent, it seemed to make sense to visit both in one vacation.

The distances and time spent on the road were a concern: some clearly wanted good advice about this. Especially if they wanted to swim, ski or cycle, or go for a pony ride – they wondered what they could fit in, and how.

Uncertainty about:

- Adequate communication in a foreign language, and
- Would the locals be as welcoming to visitors as the Québécois

These increased their concern about not taking on too arduous or too rushed a schedule.

## 4.5 British Columbia Specifics for France

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The more active French tourists, particularly those with limited vacation time, would probably be well advised to concentrate on just one province or the other. The two itineraries suggested below are on different time frames.

I BC (2 weeks)	II BC and Alberta (3 weeks)
<p>Arrive Vancouver            Explore city (3-4 days)            Choice of guided vs. independent)            Included:-</p> <ul style="list-style-type: none"> <li>➤ Stanley Park tour</li> <li>➤ Grouse Mountain</li> <li>➤ Harbour tour</li> <li>➤ Van Dusen</li> <li>➤ Museums</li> <li>➤ Tourist districts: Gastown, Chinatown, Granville Island</li> </ul> <p>Transfer to Vancouver Island (3-4 days)            Options:</p> <ul style="list-style-type: none"> <li>➤ Whale watching</li> <li>➤ Cycle tour</li> <li>➤ Nanaimo</li> <li>➤ Butchart Gardens</li> </ul> <p>Transfer back<sup>9</sup> to Vancouver (brief stop)            Up the coast to Powell River (3-4 days)</p> <ul style="list-style-type: none"> <li>➤ Exploration</li> <li>➤ Cycle/walking tour</li> <li>➤ Rafting (?)</li> </ul> <p>Back to Vancouver → Paris</p>	<p>Arrive Calgary (3-4 days)            Visit Amerindian Museum and rodeo<sup>10**</sup>            Visit Banff, Lake Louise, funicular, walking tour            Transfer to Vancouver (via train with observation car?)            (Continue as per I)</p>

<sup>9</sup> Preferably – different mode, different route (e.g. ferry one-way, seaplane the other)

<sup>10</sup> Possibly a working ranch; horseback riding option; rodeo skills demonstrations

## 4.6 General German Product Discussion

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The vast majority of German travelers desire a “modular” experience with a vast range of “plug and play” tourism products. Some of this derives from requirements to visit with family and/or friends, but the majority derives from how many Germans wish to travel (i.e. with a “safety net” but not too scheduled).

One of the primary concerns expressed by many respondents concerned the “infrastructure” of the country.

*“I don't have any concerns regarding the food. The language might be more of a problem. Also, staying overnight somewhere in nature might be problem if there are no accommodations available (booked or no accommodation at all). Also, the journey from one place to the other might be a problem (bus-or train connections, cancelled flights). I have the impression that Canada is civilized and safe (the opposite of Far East or Africa). I also just have smaller concerns regarding medical care.”*

When examined more closely, these concerns tended to revolve around a) what would happen if no one was within easy range to help them and b) how this would impact on their schedules.

*“My concerns are that the time schedules finally ends up to be too short and that we end up in stress. The rented car might be broken or we might have an accident. The weather could be bad. Unexpected construction places may tumble up our schedule.”*

These concerns led a fair number of respondents to pre-book and, in some cases, choose tour operators rather than book for themselves. On particular comment is especially illuminating in this regard:

*“I should be able to do all scheduling from here. If there is a professional tour operator, I would book the trip there. It is important to me that everything, from hotel to departure, is perfectly organized so I can just focus on travelling. So if there are overnight stays during the round trip, I expect that everything is organized and I have a bed waiting for me. Of course, there is no guarantee for the weather. Of course, my highlights should be memorable nature impressions (in the mountains or in National Parks). The cities aren't that important to me. I expect a kind of European standard there.”*

## 4.6 General German Product Discussion

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This strong requirement for a safety net has several implications for tourism products beyond modularity. First, while “authenticity” should continue to be stressed, safety infrastructure components should also be highlighted: for example, links to cell phone rental sites, web-based geo-tagging, and call centre “help lines” (in German). Second, the linkages between “civilization” and “nature” should be stressed more heavily; for example, images of eating breakfast on a balcony overlooking “authentic nature”. It is important to note that Germany does not have a colonial tradition (as do France and the UK), even though many Germans came as colonists to North America. This means that the imagery (real or mental) of “roughing it in the colonies” is not a part of German heritage or culture.

### ***Road trips***

Road trips particularly appeal to respondents who want flexibility in their schedules. As one respondent noted:

*“In any case, I would plan with three weeks of vacation; everything else would be too short. Vancouver would be my starting point again for 3 to 4 days (maybe a bit shorter) to get used to the time difference (this usually takes us some time) and I personally like Vancouver a lot. In any case, we would do a round trip by car again. From Vancouver to Squamish where we would stay a bit longer because my husband is a passionate surfer. I would stay maybe a week there and then to Lillooet, Harrison Hot Springs (I am totally interested in hot springs). Concerning the individual length of each stop (besides Squamish) I don’t want to map out everything. It depends on what we want to see, in what mood are the children, do we like it or do we want to move on.”*

German respondents appear to have a love/hate relationship with road trips. The “love” part concerns the ability to travel as they will and to experience “authenticity” in their travels whether that be authentic nature or authentic people. The “hate” component shows up most clearly in concerns that their cars will break down and they won’t be able to get help.<sup>11</sup>

The production and dissemination of a “road trip tour guide” may well serve to reduce the tensions surrounding road trips. The deployment of geo-tagging would also serve to reduce any anxiety that may show up by allowing people more options.

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<sup>11</sup> It is somewhat inaccurate to refer to this as “hate” – it is really “fear”.

## 4.6 General German Product Discussion

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### ***On Skiing***

Skiing and winter sports have been the subject of intense advertising, and this has been compounded with the 2010 Olympics (mentioned several times by the respondents). What is, however, interesting is that while skiing in Canada is recognized, it is not really understood that well, and only in relation to BC.

*“Long slopes, no standing in line at the lift, powder, nature, good food, experience the huge area where the next Olympic Games will take place, good, funny, coltish après ski.”*

*“Enjoying the fascinating powder, go down the wide slopes and enjoy the nature. Unfortunately, you can't find this in the Alps.”*

As with the UK travelers, the potential for a solid viral marketing campaign exists in order to highlight Canadian ski destinations. Given the general German reluctance to deal with nature “in the raw”, it would be best to concentrate this campaign on the intertwining of “civilization” and “nature”.

### ***On guided tours***

Guided tours have a strong attraction at the city level. In addition to the “standard” cultural fare of such tours, it is recommended that some effort be made to highlight key city-cultural components (e.g. ethnic districts, local eating traditions, etc.). This has the advantage of showing where, and how, a German traveler can, if they choose, experience authentic city life.

Probably the greatest barrier to increasing German tourism is the perception of Canada as too focused on nature.

*“My highest priority is experiencing the nature. I would go snowboarding and skiing. I am up to do long hiking tours in the impressive forests of this area. It would be important to me to experience its nativeness and inviolacy. Of course, I would hope to see some rare local animals. If possible, I would like to visit a national park guided by a ranger. Staying overnight in a cabin would be the highlight of my trip. Sitting near a fire belongs to this as well.”*

*“I am expecting terrific nature impressions. I also picture a hike in the snow to be pretty amazing.”*

## 4.6 General German Product Discussion

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What is strange about this perception is that many respondents who had not visited Canada appeared to hold it while, at the same time, talking about Canadian cities. Unlike their counterparts who had visited Canadian cities, non-visitors really appear to have no perceptions of Canadian cities as “desirable”.

*“I expect to see lots of cities for sure. Culture is number one on my list. Maybe some museums and sights. And nature of course.”*

*“Especially attractive for me is the mixture of nature and city.”*

Since many German potential visitors want “culture” with their “nature”, we would strongly recommend that the “cleanliness” and authenticity of Canadian cities, as well as their close links to “nature”, be emphasized.

A corollary of the over emphasis on “nature” is the general lack of understanding about the cultural depth of Canada. For example, despite the fact that Toronto is a Tier 1 theatre city, no mention whatsoever was made of it. There were limited references to “festivals” (mainly un-named except for the Calgary Stampede), “art” and “museums” but, on the whole, there is a serious lack of knowledge in Germany about cultural activities in Canada.

The sole major exception to this lack of knowledge about culture in Canada is in the area of Aboriginal culture. In Germany, there is a general fascination with “First Nations”<sup>12</sup> and, while some respondents are not “into the Wild West”, many are fascinated with the “First Nations people”.

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<sup>12</sup> This fascination goes back well over 100 years. For example, there were “recreationist” “Indian” events in Bavaria in the 1880’s.

## 4.7 British Columbia Specifics for Germany

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British Columbia is one of the best know destinations in Canada to Germans. Vancouver itself, along with Whistler, are receiving increasing coverage as the 2010 Olympics draw closer, and both are iconic sites for German travelers.

In addition to viewing the mountains and nature watching, certain options appeared to catch the attention of the respondents; primarily kayaking/canoeing, whale watching and hiking.

*"From there (Vancouver) I would go to northern BC for whale watching. I don't want to miss that for sure. Already there, I would do kayaking as well."*

*"I find whale watching very attractive. I would spend a few days in Vancouver for sightseeing and shopping, after that to Vancouver Island for whale watching. I would do that with a bigger tour operator or by kayak. This sounds exciting and the direct contact with the animals is for sure amazing."*

For respondents who had been to British Columbia before, their suggested itineraries were in depth and road trip oriented.

*"We would travel from Vancouver in September with a rented car. Three days Vancouver – city tours, continuing from Banff to Jasper to experience the nature and wildlife, experience the Columbia Icefields, two weeks to Vancouver Island: Nature, huge trees, whales, beaches. Then visit the city of Victoria for two to three days."*

*"First of all, I would start again in Vancouver like the last time. This time, I would take some more time for sight seeing in the city and enjoy the city and its cultural variety than I did last time, four-five days. Then I would like to travel to Vancouver Island and have a closer look; there is so much to see that you can spend two weeks here to see everything, e.g. I am interested to see Ucluelet and Tofino on the Pacific coast. Here you can find a fantastic mixture of nature and culture. Rainforest, the Wild Pacific Trail or the Willowbrae Trail and the long beaches at Long Beach. Wildlife: gray whale, bald eagle, otter etc. then the interesting art of the Nuu-chah-nuth-people and the First Nations Art Galleries. In short, I could stay at least eight to 10 days here. If possible, I would like to come in July or August to experience the Summer Music Festival. If I would have a few more days, I would travel across the island by rented car."*

## 4.7 British Columbia Specifics for Germany

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What is readily apparent from these two respondents is that they are a) comfortable with traveling in Canada and b) interested in filling in details they missed last time. As was apparent with both UK and French travelers, Canada's biggest marketing tool is the actual experience of visiting.

Of particular interest is one of comments made by the second respondent quoted above: "*Here you can find a fantastic mixture of nature and culture*". This comment shows the radical differences between German and Canadian perceptions of both "nature" and "culture", and highlights the importance of intertwining the two in tourist product advertising in Germany. The comment, in its full context, also shows exactly how many Germans perceive aboriginals in Canada – i.e. through the lens of Rousseau's concept of the "Noble Savage"; someone who is in harmony with nature.

For respondents who had not been to Canada before, itineraries were much broader. At the same time, they were much less focused on "culture" in any form. For example:

- Day 1: flight to Vancouver
- Day 2,3: handling jetlag and sightseeing
- Day 4: trip to Victoria, sightseeing (history)
- Day 5,6: visiting Vancouver Island and whale watching in Port Hardy
- Day 7: day trip on a ship through the Inside Passage and crossing to Prince Rupert for whale watching
- Tag 8: trip to Queen Charlotte Island
- Day 9,10: watching wildlife on the island
- Day 11: trip to Prince Rupert
- Day 12-14: trip to Prince George and to Jasper and Banff national Park (watching wildlife, hiking)
- Day 15-17: trip to Revelstoke, Kelowna, and back to Vancouver
- Day 18, 19: trip to Seattle (Boeing)
- Day 20: departure to Germany
- Day 21; Arriving in Germany"

This type of itinerary was fairly common, and could easily be put together by a tour operator out of modular components.

#### 4.7 British Columbia Specifics for Germany

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A similar, although less exhaustive, itinerary is:

- “1. Flight from Frankfurt to Vancouver with three days of recreation, shopping (clothes and antiques), visiting several art galleries
  2. Travelling to Vancouver Island. Duration: three days. Activities: kayaking, whale watching, visiting art galleries
  3. travelling to Caribou/Chilcotin, especially to Bowron Lake Provincial Park for canoeing. Stay: about 2 days for relaxing
  4. travelling to northern BC. Stay: 15 days all in all. 1 days sightseeing and after that 10 days for multiday rafting t the Gataga-Kechika river. Last four days for relaxing.
  5. back to Vancouver, stay for 1 day and prepare for departure.
- We would do all the driving by coach or rented car. Duration of stay in total: 25-30 days.”

While this one shows a slightly greater interest on culture (“art galleries”), it is still primarily focused on nature. This nature focus is too strong to be easily overcome outside of the actual experience of visiting British Columbia. This suggests that the best form of “new product” be some form of general tour that introduces the German traveler to the cultural and urban aspects of BC, while still concentrating on “authentic nature” and, possibly, aboriginal product draws.

## 4.7 British Columbia Specifics for Germany

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One suggested itinerary for first time visitors would be

Arrive Vancouver

Explore city (3-4 days)

Choice of guided vs independent

Included:-

- Stanley Park tour
- Grouse Mountain
- Harbour tour
- Museums, Art Galleries
- Tourist districts: Gastown, Chinatown, Granville Island

Transfer to Vancouver Island (4-5 days)

Options:

- Whale watching
- kayaking
- Cycle tour
- Butchart Gardens
- Ucluelet, First Nations Art Gallery

Transfer back to Vancouver (brief stop)

Up the coast to Chilcotin (3-4 days)

- Exploration
- Cycle/walking tour
- Rafting, canoeing, kayaking
- Hiking

Back to Vancouver (2 days) → Frankfurt

For returning visitors, it will be more important to concentrate on in depth exploration opportunities via either road trips or longer stays in a single area. The key for road trips lies in proving assurances of safety and flexibility, while for longer stay options it relies on increasing the convergence of nature and culture.

## **Section 5: The Buy Cycle Model**

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## 5.1 The Buy Cycle Model

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### **A) HOW IT WORKS**

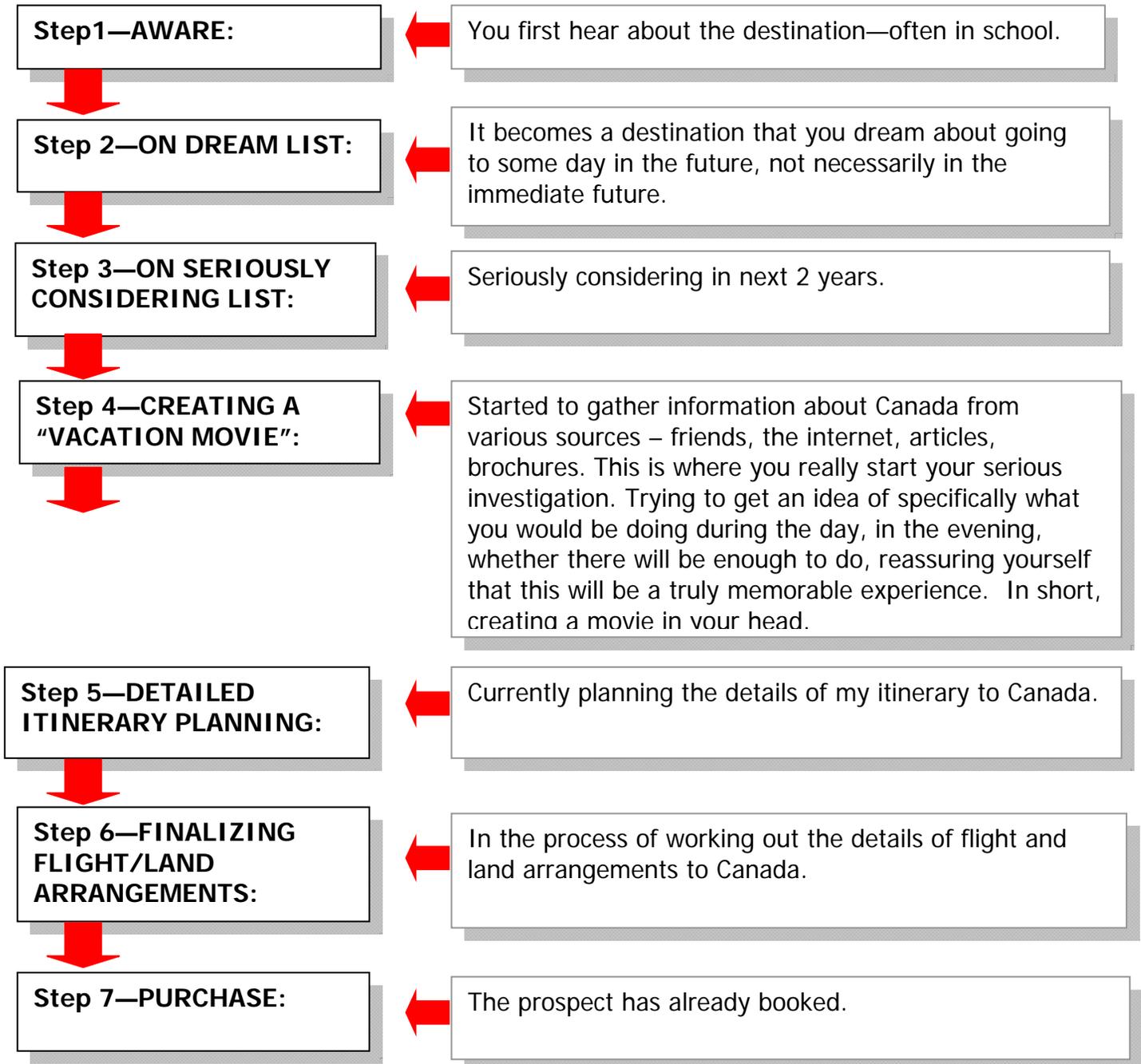
- The Buy Cycle Model was developed by Insignia during three separate tourism studies in China, Taiwan and South Korea examining in a real life environment the step by step planning process.
- The Buy Cycle was then subsequently evaluated in 18 focus groups in Europe-- the U.K., France and Germany. Those discussions further validated that this is the way people think.
- Finally, Insignia built a quantitative question into the 3 studies to measure where people are on the Buy Cycle path and where the barriers are. The findings confirm the focus group learning and direct us toward the importance of helping prospects build their own "movie".

## 5.1 The Buy Cycle Model

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### A) HOW IT WORKS

- The model is described below:



## 5.1 The Buy Cycle Model

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### **B) BUY CYCLE INFLUENCERS - GENERAL**

- The key influencers that drive prospective travellers to each stage are outlined below:

#### **Step 1 – First Aware**

- Awareness generally starts early in life for traditional destinations, usually in school. For relatively new prospective travel countries (e.g., Dubai), television travel shows or news coverage can create the initial awareness.

#### **Step 2 – Getting on the Dream List**

##### **U.K.**

- There are a number of factors that get a destination on the “Dream List”. Clearly, it is one (or a few) icons in that country that drives initial appeal.
  - *“I really want to see the Terracotta Warriors” (China)*
  - *“The Rockies” (Canada)*
  - *“The Great Barrier Reef” (Australia)*
  - *“Go on Safari” (Africa)*
  - *“The magic of New York City” (U.S.A.)*

##### **Germany**

- For Germany, there is a bit of a blending of Step 1 and Step 2. As a culture that enjoys travel a great deal, awareness of a travel destination places it on the dream list.
- What promotes a location up on the dream list is an overall sense of the place, its vastness, its vistas, and how the place contrasts with Germany. Germans want locations that offer things they can't get at home.
  - *“I want to experience a mountain climb.” (China/Nepal)*
  - *“There is dog sledding” (Canada)*
  - *“It's so huge” (Australia)*
  - *“Our winter is their summer” (South Africa)*
  - *“Lots of different places to explore by car” (U.S.A.)*

## 5.1 The Buy Cycle Model

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### France

- There are two common influencers that get a destination on the initial “dream list”.
  1. Travellers have seen a television program, travel show, a memorable image, or read an article about a destination that triggers a deep interest:
    - *“I must go there some day”*
  2. Friends who have previously visited are also very influential:
    - *“You must go there as well”*
    - *“Let me show you our slides/pictures”*
- To some degree, there is social pressure here to conform as well as to bond with a common experience.
  
- Common influencers to get a destination on the “Dream List” include:
  - TV shows
  - Friends who have been there
  - Feature films
  - General advertising

## 5.1 The Buy Cycle Model

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### **Step 3 – Getting on the Serious Consider List**

At this stage the dream has moved into the near term reality stage. This can be stimulated by:

- Finances – I've got the money now to take a long-haul trip
- Time – I have the time available
- Friends are raving about the place from a previous visit
- Pressure from family and friends at the destination to come and visit
- Aging – must see the country before my health does not permit it
- The persuasion of friends often creates peer pressure to conform.
  - *“My friends were going so I followed their advice”*
  - *“Friends told me about their trip”*
  - *“My friends said you have to go”*
  - *“Friends showed films”*
- Further, travel is important as status and to visit an uncommon destination **first** creates **bragging** rights.

## 5.1 The Buy Cycle Model

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### **Step 4 – Creating a Detailed “Movie”**

At this stage, prospects start to create a “movie” in their heads about what the trip could be like:

- Friends who have been there (highly influential)
- The internet (a multitude of site checks)
  - ***“There are hundreds and hundreds of sites I can click on”***
    - The most common types of sites searched appear to be:
      - Official tourism sites
      - Tour operator sites
      - Government sites
      - Cheap travel sites
    - Often travellers will simply enter the country name (e.g., Canada) and perhaps “travel” in a general search engine to begin the process. This confirms how important it is for the Partners to have techniques in place to land at the top of the search engine results.
- Brochures from travel agents (to get itinerary ideas, not necessarily to purchase)
- Friends and relatives at the destination
- Magazine articles
- Television shows

## 5.1 The Buy Cycle Model

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### **Step 5 –Detailed Itinerary Planning**

#### **U.K.**

- The internet is the key source to organize the itinerary, as well as agent brochures.

#### **Germany**

- The internet is the key source to select the airline, hotels and/or packages. They arrange the itinerary, have some concrete details, and then go to a travel agent to help them with further constructing and finalizing it and getting everything in order.

#### **France**

- Planning direction depends a great deal on two factors:
  - Age
  - Familiarity/comfort with destination
    - Younger or middle aged travellers are far more likely to book air only and travel “a la carte” using a guide book.
    - Over 50 travellers are much more likely to buy a tour or FIT package, not wanting to leave as much to chance and having greater reassurance of a smooth, trouble free journey.
    - For less familiar, more adventurous destinations (e.g., Southeast Asia, China), pre-paid packages are quite common.
    - For more comfortable destinations or repeat visits “a la carte” is preferred (this includes Canada, as discussed later).

## 5.1 The Buy Cycle Model

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### **Step 6 – Finalizing Flight/Land Arrangements**

#### **U.K.**

- Often on the net, but many use agents.

#### **Germany**

- As a travel agent has likely been used to help finalize the trip, they typically booked through them as well, allowing a single point of contact in case difficulties arise.

#### **France**

- More and more French people are buying direct on the internet. They are convinced that they will save money doing so. There is very little reluctance to book online.
- Further, more travellers are opting for air only, especially to Canada.

### **Step 7 – Purchased**

- The trip is now sold.

## 5.1 The Buy Cycle Model

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### **C) BUY CYCLE INFLUENCERS - CANADA**

- The process is fundamentally similar for Canada.

#### **Step 1 – First Aware**

- Typically learned about Canada in school.

#### **Step 2 – Getting on the Dream List**

##### **U.K.**

- Usually a desire to see the Rockies and, for many, Niagara Falls, to feel the vastness, clean and peaceful environment.
  - *“I saw the Rocky Mountaineer train on a television programme.”*
  - *“I carry this picture of a home in Nanaimo on a lake. It looks like a peaceful place. There is so much to see”*
- As discussed later, very important learning here is that the powerful desire to visit Canada is driven typically by a nature iconic image and the “movie” at this stage does **not** constitute a full or balanced concept of a viable vacation. There are still many unknowns about what else there is to do and places to stay.

##### **Germany**

- Usually a desire to be in a country with a great deal of space and the freedom to enjoy that space.
  - *“I feel better if people have already been there and they tell me about it.”*
  - *“You could go in your caravan and stop and stay wherever you’d like.”*
- As discussed later, very important learning here is that the powerful desire to visit Canada is driven typically by vistas (wide expanses that Germany lacks) and the “movie” at this stage does **not** constitute a full or balanced concept of a viable vacation. There are still many unknowns about what else there is to do and places to stay.

## 5.1 The Buy Cycle Model

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### France

- *“Saw a film on Canada”*
- Long held dream “to see French Canada way of life”.
- A recent movie about a trapper in Canada (very popular)

### Step 3 – Getting on the Serious Consider List

### U.K.

For those who have advanced beyond the dream stage, the drivers are usually:

- Ads that communicate affordability (e.g., Zoom ads).
- These budget airline ads are very important in bringing the destination closer perceptually.
  - *“It feels within reach”*
- A desire to go there before health deteriorates (a finding which supports the popularity of Canada among the age 50+).
- Friends who have been there raving about the beauty plus the English speaking factor, it is more sophisticated than expected, the good exchange rate (purchasing power).
- They have visited other priority destinations (particularly America) and it is now time for Canada.

## 5.1 The Buy Cycle Model

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### Germany

- For those who have advanced beyond the dream stage, the drivers are usually:
  - Additional information about Canada and Canadian culture.
  - This information (from ads, news, TV shows, etc.) helps to fill out what can be done in Canada, beyond nature touring, making it more interesting.
    - ***“Driving for hours and hours is boring. I want to explore the differences between French and English Canada.”***
  - A desire to go there before health deteriorates (a finding which supports the popularity of Canada among the age 50+ as with U.K. travellers).
  - They have visited other priority destinations (particularly America) and it is now time for Canada.

### France

- Here are the kinds of stimuli that got Canada on the near term consider list:
  - ***“Past visitor recommendations”***
  - ***“My son was there”***
  - ***“Saw a TV program”***
  - ***“Husband gave me a book on Canada for my birthday”***
  - ***“Saw recent film on Canada – a brilliant, ambitious doctor who went there”***
  - ***“Friends in Quebec”***
  - ***“My mother wants to go for her 70<sup>th</sup> birthday”***

## 5.1 The Buy Cycle Model

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### Step 4 – Creating a Detailed “Movie”

#### U.K.

- *“I saw myself sightseeing in the cities and seeing the lakes”*
- *“The movie became exciting when I could see we would be enjoying ourselves”*
- *“Collected brochures”*
- *“Began to design an itinerary”*
- *“Went to the library to get books”*
- *“The internet”*

#### Germany

- *“It’s not as difficult as going to the US”*
- *“We go to the travel agent and check out the absolute musts, how much it costs, and how long it takes”*
- *“I was really impressed by the pictures of Vancouver”*
- *“You can stay in a nice hotel and explore the city and area around it from there as your home base”*
- *“My wife and I want to drive coast to coast, to get to know the people.”*
- *“People who went there always said they had a good experience”*
- *“I talk to my travel agent”*
- *“The internet”*

## 5.1 The Buy Cycle Model

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### France

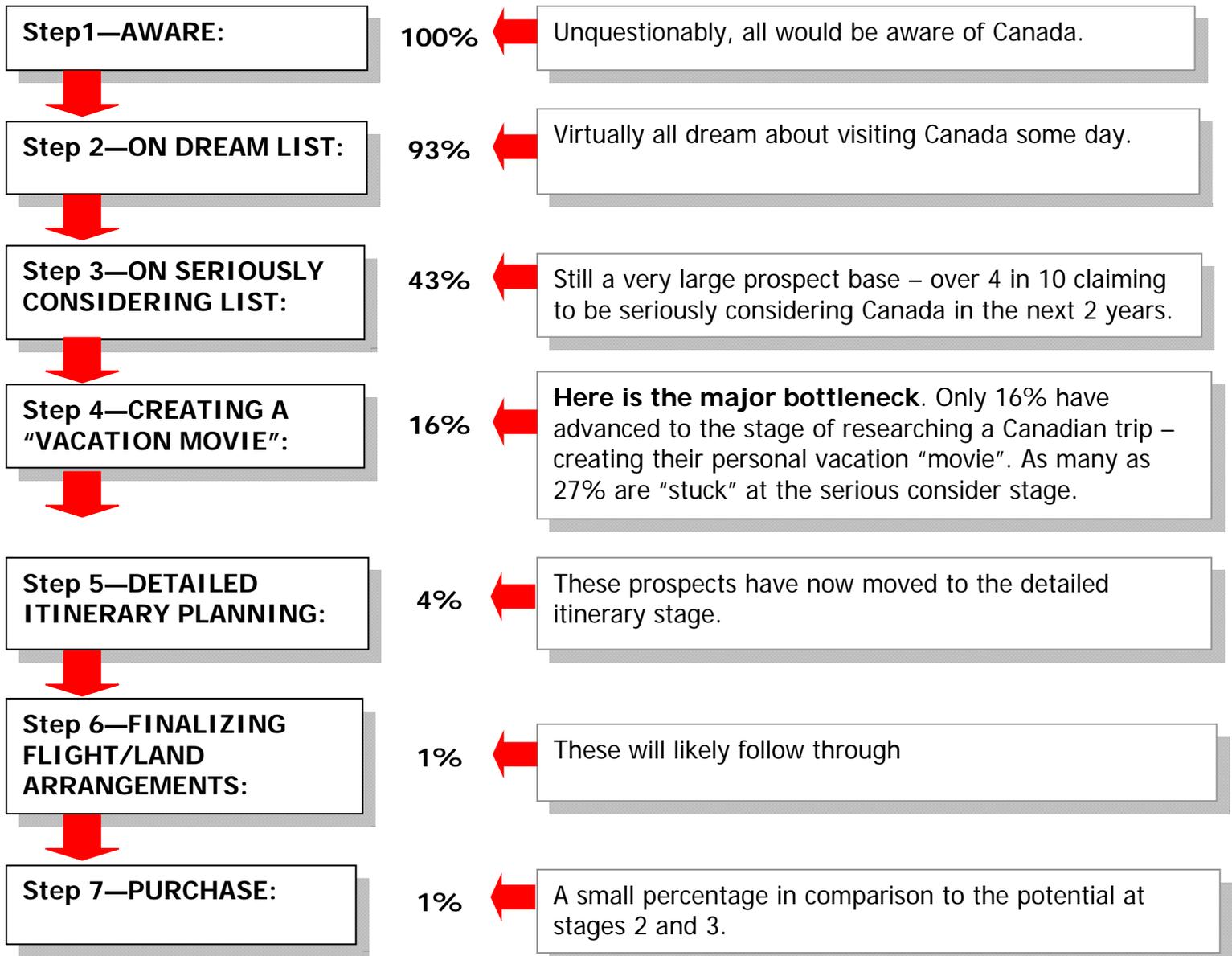
- *“Went to agency for tour information”*
- *“Guide du Boutard”*
- *“Michelin guide”*
- *“Looked at a map”*
- *“Search the net – click on pictures”*
- *“Read blogs”*
- *“Read novels on Canada”*
- *“Asked people who had been there”*

## 5.1 The Buy Cycle Model

### D) BOTTLENECKS AND BARRIERS – CANADA

- The chart below illustrates how far the long-haul travel market has advanced along the Buy Cycle path for a trip to Canada.

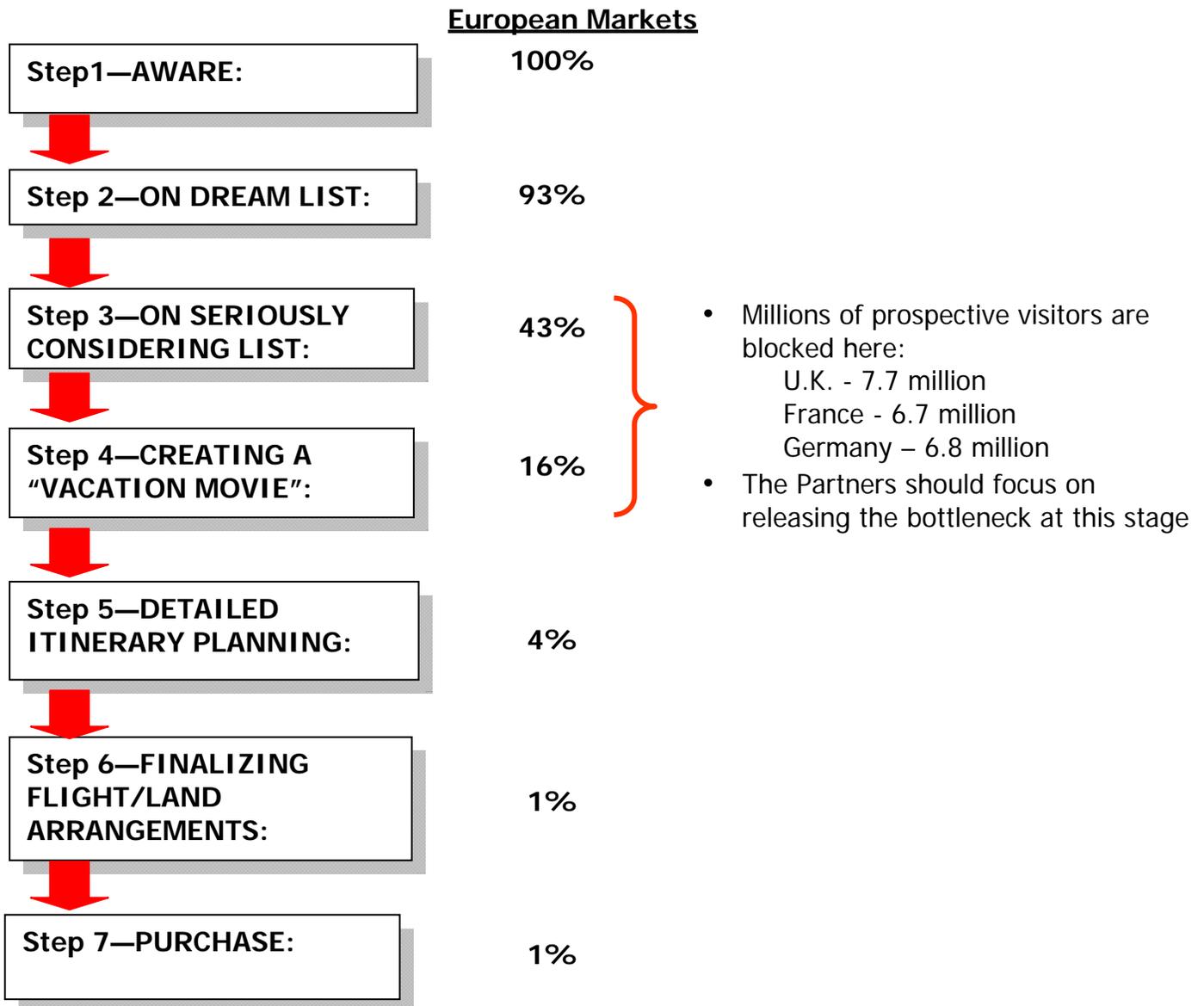
#### European Markets



## 5.1 The Buy Cycle Model

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### E) PROJECTED MARKET SIZE



## **Section 6: Breaking Down Buy Cycle Barriers**

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## **6.1 The Components of The Ideal Movie**

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Here are the key components of the ideal “movie” for most travellers:

1. A route or itinerary
2. A sense of time, distance
3. The promise of memorable moments/activities
4. Reassurance of fun and good times
5. Reassurance of comforts (accommodation, good food)
6. Approximate budget requirements

## **6.2 Where Do Travellers Go To Build That Movie?**

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Here are the most common places travellers go to build that movie:

1. Friends (past visitors or destination residents)
  - ◆ What better way to get a trusted recommendation on where to go and must sees.
2. Internet
  - ◆ Clearly the growth influencer
  - ◆ Word search engines most popular
  - ◆ Official government sites imply objectivity
3. Existing Packages
  - ◆ A great place to get itinerary ideas without any obligation to purchase
4. Travel Agents
  - ◆ Their advice is less important now because the internet has provided so much knowledge.

### 6.3 How Can Websites Be Enhanced?

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Most official sites appear built for the North American market.

They assume travellers are basically familiar with distances and travel times.

Yet, for Europeans, visitors express lack of awareness of place names, or distances involved.

They need:

- ◆ Maps
- ◆ Itinerary suggestions
- ◆ Routes with trip times by various forms of transportation
- ◆ "Must-sees" along the way
- ◆ Pictures, video tours, etc., of highlights along the way

## 6.4 Provincial/Territory Website Evaluation

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### Introduction

The Insignia team graded 26 websites on their ability to meet the requirements of European travelers in the planning process. The website addresses were given to us by the participating provinces and territories and provided to participants in Insignia's Forums for product reference.

### Background Learning From Forums

For European visitors, sites need to help create the imagery needed to build a trip movie. One of the key problems that many visitors expressed was that they don't know most of the place names and have little or no comprehension of the distances involved. This means that there are several crucial processes that have to be facilitated in order to get them to make their trip movie.

1. Maps, Maps, Maps. These can be "normal" maps or Google Earth maps (such as the one in Nova Scotia's Tourism page - <http://novascotia.com/en/home/googleearth/default.aspx>).
  - a. High tech version – geotagging such as google earth, but with extensive information, including video, planted.
  - b. Low tech – flat picture with image map links to specific area/city/town information.
2. Itineraries, including "must see" places and events (a la Fodors and Baedekers[<http://en.wikipedia.org/wiki/Baedeker>])
3. Routes with trip times by various forms of transportation. Ideally, this would be a map-driven planner, and would include "Things to see and do" along the way. NB: given the problems with size perception, it is also useful to note gas stations and cell phone zones.
4. Pictures, video tours (e.g. <http://www.canadaeastcoast.com/English/Video/index.html>) and web cams ([http://www.bluemountain.ca/winter\\_webcams.htm](http://www.bluemountain.ca/winter_webcams.htm))

The web site must help them makes sense of all the material offered. A "Help me plan" or "suggest an itinerary" component could prove very useful aimed at both place ("I'm in X for 3 days, what can I do here?") and at activity ("I want polar bears, where can I get them?"). Finally, there should be a "My Trip" folder that would allow saving itinerary components and producing a comprehensive itinerary.

## **6.4 Provincial/Territory Website Evaluation**

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### **Making the Dream Vacation a Real Vacation.**

In order to get many Europeans to come to Canada, they must feel a connection with the country. Often, this is done via VFR, but VFR can be simulated over the Internet. Constructing a CTC sponsored, but not moderated, online tour Canada community can help with this.

This can be enhanced by presenting images of Canada in permission based email marketing on the model used by the Austrian Tourism Office (see [http://www.austria.info/xxl/\\_site/us/\\_area/416153/home.html](http://www.austria.info/xxl/_site/us/_area/416153/home.html) for an example). This matches models of marketing discussed at the Canada E-Connect conference last November.

### **Specific Web Sites**

Many of the specific web sites tested out well, but were usually missing something (see individual listings below). The biggest problems are with maps and route planners, but there are also serious problems with virtual community linkages. A number of specialty sites, especially in Manitoba, just are not tourist oriented; they lack tourist relevant information (i.e. how do I get here, where do I stay, etc.).

One of the best specialty sites is the Blue Mountain Ski Resort, which can be used as a "best practice" for specialty sites.

### **Website Ratings**

#### **Criteria:**

1. Ease of finding visuals
2. Ease of finding suggested itineraries
3. Ease of finding route maps
4. Ease of trip planning
5. Ease of linking to online community (including rss feeds)

## 6.4 Provincial/Territory Website Evaluation

### Rating scale:

E – Excellent, included in main navigation or front page

A – Acceptable, fairly simple to find

P – Poor, difficult to find

N – not available

Web Site	Criterion				
	1	2	3	4	5
Banff Lake Louise <a href="http://www.banfflakelouise.com/">http://www.banfflakelouise.com/</a>	E	A	A	A	N
Canadian Badlands   Experience the <a href="http://www.canadianbadlands.com/">http://www.canadianbadlands.com/</a>	E	E	E	E	N
Edmonton.com: Travel, Tourism & Leisure - Tourism. <a href="http://www.edmonton.com/tourism/portal.asp?page=4">http://www.edmonton.com/tourism/portal.asp?page=4</a>	P	P	A	P	N
Reviews of holidays, hotels, resorts, holiday and travel packages - TripAdvisor. Available at: <a href="http://www.tripadvisor.co.uk/">http://www.tripadvisor.co.uk/</a>	N	N	P	P	E
Rocky Mountain Ski Vacations - Canadian Rockies   Travel Alberta. <a href="http://www1.skicanadianrockies.com/?country=CA&amp;state=-">http://www1.skicanadianrockies.com/?country=CA&amp;state=-</a>	P	N	P	P	N
Tourism Calgary. Available at: <a href="http://www.tourismcalgary.com/">http://www.tourismcalgary.com/</a>	E	A	N	N	N
Travel Alberta Canada - Wish You Were Here <a href="http://www1.travelalberta.com/en-ca/">http://www1.travelalberta.com/en-ca/</a>	E	A	A	A	N
Atlantic Canada Travel   Atlantik Kanada Reise   La côte Est du Canada. <a href="http://www.canadaeastcoast.com/">http://www.canadaeastcoast.com/</a>	E	P	P	P	N
novascotia.com - Nova Scotia's Official Tourism Website   Visit Canada's Atlantic Coast. <a href="http://novascotia.com/en/home/default.aspx">http://novascotia.com/en/home/default.aspx</a>	E+	E	E	E	N
Tourism BC   Official Travel Website of British Columbia. <a href="http://www.hellobc.com/en-CA/default.htm">http://www.hellobc.com/en-CA/default.htm</a>	P	N	E	E	E

## 6.4 Provincial/Territory Website Evaluation

Web Site	Criterion				
	1	2	3	4	5
Aboriginal Tourism site Available at: <a href="http://www.manitoahbee.com/">http://www.manitoahbee.com/</a>	N	N	N	N	N
CMHR - Canadian Museum for Human Rights. <a href="http://canadianmuseumforhumanrights.com/">http://canadianmuseumforhumanrights.com/</a>	N	N	N	N	N
Earth Rhythms customized travel to Riding Mountain National Park-Manitoba-Canada: Getaways, vacations, adventures, Elkhorn Resort and spa, retreats, team building, executive gifts. <a href="http://www.earthrhythms.ca/">http://www.earthrhythms.ca/</a>	A	E	E	E	E
FortWhyte Alive   Home. <a href="http://www.fortwhyte.org/">http://www.fortwhyte.org/</a>	P	N	E	A	N
Manitoba Theatre Centre <a href="http://www.mtc.mb.ca/">http://www.mtc.mb.ca/</a>	P	N	N	N	N
Oak Hammock Marsh Interpretive Centre. <a href="http://www.oakhammockmarsh.ca/">http://www.oakhammockmarsh.ca/</a>	N	A	N	P	N
Ten Spa : Winnipeg spa : luxury health spa Canada : Fort Garry Hotel, Winnipeg, Manitoba, Canada : 10 Spa. <a href="http://www.tenspa.ca/">http://www.tenspa.ca/</a>	N	N	P	N	N
The Manitoba Museum - Encouraging Discovery. <a href="http://www.manitobamuseum.ca/">http://www.manitobamuseum.ca/</a>	P	A	A	A	N
Aboriginal Experiences. <a href="http://www.aboriginalexperiences.com/">http://www.aboriginalexperiences.com/</a>	E	A	A	A	N
Blue Mountain Ski Resort, Ontario, Canada. <a href="http://www.bluemountain.ca/">http://www.bluemountain.ca/</a>	A	E	E	E	N
Prince Edward County, Ontario, Canada. <a href="http://www.pec.on.ca/Welcome.html">http://www.pec.on.ca/Welcome.html</a>	A	A	A	A	N

## 6.4 Provincial/Territory Website Evaluation

Web Site	Criterion				
	1	2	3	4	5
The Great Spirit Circle Trail - a Canadian Aboriginal Experience. <a href="http://www.circletrail.com/">http://www.circletrail.com/</a>	A	E	A	A	A
There's more to discover in Ontario: Welcome to Ontario <a href="http://uk.ontariotravel.net/">http://uk.ontariotravel.net/</a>	E	E	E	E	N
Travel Yukon -Tourism Yukon Deutschland. <a href="http://www.travelyukon.de/">http://www.travelyukon.de/</a>	E	E	E	E	N
CTC Website <a href="http://www.explore.canada.travel">http://www.explore.canada.travel</a>	A	E	P	E	E

### Comments On Specific Sites

- a) **Rocky Mountain Ski Vacations - Canadian Rockies | Travel Alberta.**  
<http://www1.skicanadianrockies.com/?country=CA&state=->

Has a trip planner, but is hard to navigate and is not very flexible. Basically consists of picking a resort and emailing it to your friends.

- b) **Reviews of holidays, hotels, resorts, holiday and travel packages - TripAdvisor.** Available at: <http://www.tripadvisor.co.uk/>

When you click on the map and enter Canada it comes up with No Accommodation Found.

- c) **Travel Alberta Canada - Wish You Were Here**  
<http://www1.travelalberta.com/en-ca/>

Has very nice suggested road trips but maps are very small and cannot be enlarged.

## 6.4 Provincial/Territory Website Evaluation

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- d) **Atlantic Canada Travel | Atlantik Kanada Reise | La côte Est du Canada.**  
**<http://www.canadaeastcoast.com/>**

This site has excellent information but it is VERY hard to find. I found the deeper information by accident through the accommodations section. There you can click on a particular province and you get great information that is not available through the main pages.

- e) **Available at: <http://www.manitohbee.com/>**

This site did not really have any tourist information.

- f) **Blue Mountain Ski Resort, Ontario, Canada.**  
**<http://www.bluemountain.ca/>**

A wealth of information on the site yet it is easy to navigate. Maps are coded with numbers depending on which route you are taking. Particularly impressive were the shuttle bus map which would be very reassuring to tourists who don't want to drive while visiting. It also has an interactive resort map.

- g) **Prince Edward County, Ontario, Canada.**  
**<http://www.pec.on.ca/Welcome.html>**

This site does have some good interesting maps which show things like country roads and bike routes. The main meat of the information about things to do is in their visitor guide which is awkward to view online but you can print it.

- h) **There's more to discover in Ontario: Welcome to Ontario.**  
**<http://uk.ontariotravel.net/>**

This site has excellent suggested itineraries, great maps and you can find everything from the first page.

- i) **Travel Yukon -Tourism Yukon Deutschland.**

Excellent interactive map at <http://www.travelyukon.de/html/maps.html>

NB : Navigation links do not show properly in Firefox.

## 6.4 Provincial/Territory Website Evaluation

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j) [WWW.explore.canada.travel](http://www.explore.canada.travel)

Maps are available from first page, but very poor detail once there.

Also, as a note, having "Gay Friendly Canada" right above "New Security Procedures" might not be the smartest link....

## 6.5 Summary

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It is critical that key websites provide the opportunity for Europeans to plan an itinerary easily and to create their own dream vacation “movie”.

The B.C. site evaluated falls short in providing itinerary suggestions and adequate visuals. These are both essential components for prospective travelers in building their own “movies” and creating a viable, workable vacation concept.

## **6.6 Campaign Needed To Drive Prospects to the Websites**

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The Internet used primarily as a planning tool, not as a source of inspiration.

Hence, the Partners should continue advertising/promotional campaigns to drive highly serious prospects to their websites.

These campaigns should inform prospects that they can find everything they need on the websites to plan their dream vacation.

With millions of European travellers at the Seriously Considering stage, there undoubtedly would be a payback from this type of campaign.

Clearly, necessary website content should be in place first to assist their planning.

## **6.7 Influential Media**

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Friends or relatives who have been to Canada recently (or who live in Canada) are the most powerful motivators for a trip to Canada. Consequently, viral (i.e. word of mouth) marketing is a direction worth exploring.

Blogs, forums and word of mouth promotional techniques are becoming more common place today and are natural channels for the tourism industry.

Non-commercial media (e.g. television travel shows and public relations) are also highly influential.

These avenues should be explored fully before considering a costly traditional advertising campaign.

**Section 7: The Travel Trade**

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## 7.1 The Evolution of The Travel Trade

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### **Fact**

With internet booking soaring, agents see their future survival in one or more of three directions:

1. Specializing in specific destinations/products (i.e. cruise specialists, Canada specialists, aboriginal tourism specialists, etc)
2. Winning back customers who have bad experiences booking direct, or
3. Developing their own website to attract internet bookers

### **Implications**

Clearly, the CTC Canada specialist programme benefits the first solution above. It is well regarded in the industry and should be continued.

With agents who are running advertising campaigns for Canada and with websites capable of promoting Canada, there is a definite role for the CTC and its partners in co-op promotional efforts to help stimulate demand.

### **Fact**

Although trending down, travel agents are still booking a significant share of trips:

- ◆ U.K.—44% in 2007
- ◆ Germany—59%, down from 89% in 2001
- ◆ France—53%, down from 73% in 1999

### **Implications**

With ground details, the trade still remains highly influential in directing prospects **within** the country to specific regions and to **specific products/ experiences** within a region.

- ◆ Consequently, it will be important for partners in particular to continue a significant level of trade activity.

## **7.1 The Evolution of The Travel Trade**

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### **Fact**

In 1997, 73% of U.K. travellers said that travel agents were influential in choosing Canada.

- ◆ Today, only 7% in the U.K. say that travel agents have any role in their choice of Canada.
- ◆ In Germany, the comparable figure is 7%, in France 16%.
- ◆ The travel trade interviews confirm these data.

### **Implications**

This raises the question about the agent's ultimate influence in selling Canada.

- ◆ It may be time for the CTC to evaluate how much of its resources should be directed toward the trade, since they are no longer primary sellers of Canada
- ◆ Funds could potentially be made available for a more robust consumer campaign.

## 7.2 New Product Must Be Brought to Market

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Tour operators are reluctant to experiment with new product until demand is proven

- ◆ Consequently, agents have only the same old product to sell.

Tour operators need to be convinced that demand exists for new product and how important it is to expand their product line.

Although packages still constitute a significant share of trips (46% for the U.K., 36% for German and 61% for French trips to Canada and British Columbia), the market will continue to swing more toward non-packaged FIT and, consequently, by pass the operator.

- ◆ This should be motivating enough to develop product for today's market

A type of product of particular interest to FIT travellers is a 2 or 7 day add-on excursion to their core vacation.

- ◆ In other words, for the FIT visitor to Vancouver, a side trip to Tofino, Victoria, the Gulf Islands, Whistler, or the Okanogan, for instance.

Websites need to package experience rich, add on excursions for overseas visitors.

Keep in mind that most overseas visitors want to see the icons of the region if they are travelling all the way to Canada, especially first time visitors. So Vancouver and the Rockies are likely to remain on most itineraries of the future.

The opportunity is for the industry to build on those core itineraries with value added "side trips" or excursions that hold visitors in the province longer and enhance the experience even more.