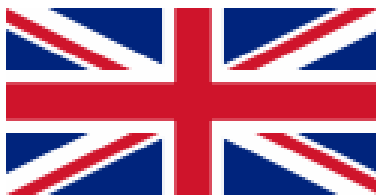


U.K. Consumer and Travel Trade Research

Final Report



February, 2008



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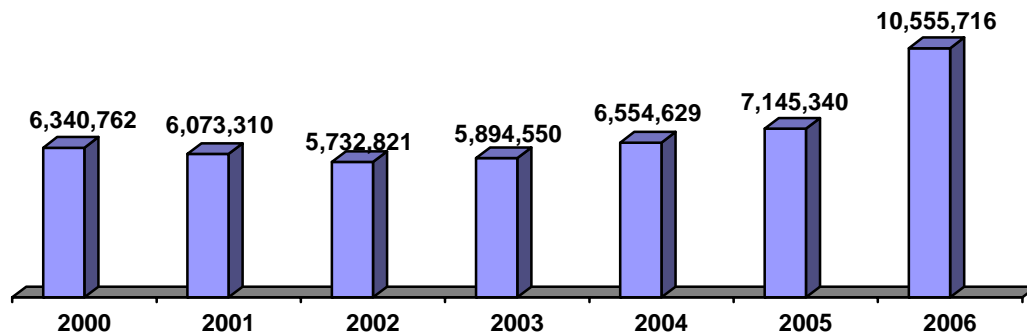
Foreword



Background

The UK's long-haul outbound market has been steadily increasing since 2002, with a sharp increase from 2005 to 2006.

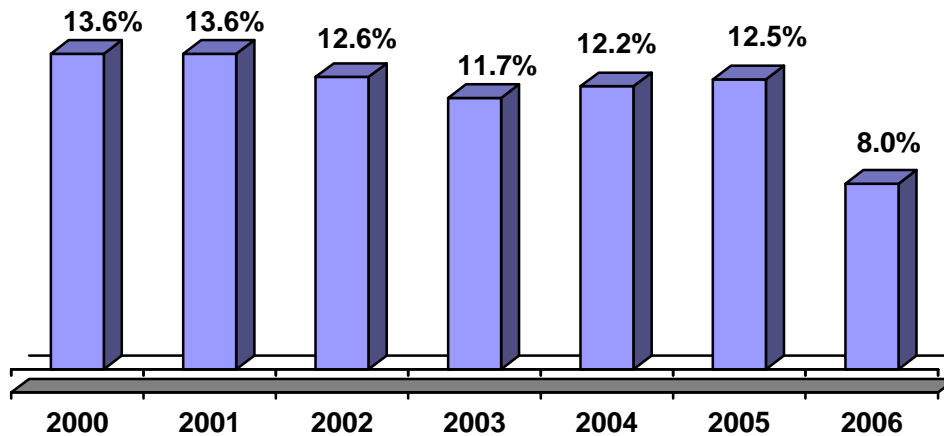
FOREWORD EXHIBIT 1: UK LONG-HAUL TRIPS, 2000 TO 2006



Source: EuroStat

In terms of share, Canada has been commanded a fairly steady 12 to 13% of the long-haul market during this period, with a drop to only 8% in 2006. Overall, while the UK is shifting away from the U.S. as a destination, it has not been rejecting Canada.

FOREWORD EXHIBIT 2: CANADA'S SHARE OF THE UK LONG-HAUL MARKET, 2000 TO 2006



Source: Statistics Canada



Background

The research was designed to meet the 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”).

This research must determine:

- ♦ What is causing the slide in travel to Canada
- ♦ What are the issues retarding growth
- ♦ How they need to be addressed
- ♦ What strategic action the Partners must take in order to steer the decline and capitalize on the enormous latent demand.

Failure to respond quickly and effectively to the decline in tourism could result in continued deterioration in visitors to Canada and ultimately undermine the Partners’ ROI.

The specific business goals, can be summarized as follows:

1. To understand **why** tourism to Canada has not grown faster.
 - Is it an awareness issue, an attitudinal issue or both?
 - Are sentiments toward other destinations at play (including the U.S.)?
2. To design the **most effective advertising and marketing communication** to reach the potential markets.
 - What are the triggers stimulating travel to Canada – current and potential?
 - How can they best be integrated into Canadian travel advertising?
 - From a media planning perspective, the ideal timing (season and lead time)?



Background

3. To make use of the most effective **communication channels** to reach the target market.
 - The internet
 - Advertising vehicles
 - Trade – agents/wholesalers
 - Other channels
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.
 - Motivational/product segments
 - Demographic segments
6. To create market-sensitive **product packages**.
 - Most appropriate activity/interest focus
 - Most effective price points
 - Best packaging components (the correct type of accommodation, duration, ground activities, etc)



Research Objectives

The research was focussed on 8 primary areas:

a) Defining the Target Market

- ♦ Insignia successfully generated product/motivational segments in Japan, South Korea, Australia and India some of which became prime targets, yet cut across the age spectrum. The same successful methodology was applied to the UK market.
- ♦ Aside from general target segments, there may be important niche markets that specific provinces and/or territories should be going after.
- ♦ What is the size of the potential market for Canada overall and for each of the partners?

b) Global Segmentation

- ♦ How do travellers define or segment global destinations?
- ♦ Do they cluster destinations in a way that helps us understand the destination decision process?
- ♦ In Asia/Pacific, destinations are clustered by region – Asia, Europe, North America. Each region has an overall personality and that analysis helps to sort and clarify the multitude of individual global destinations that exist.
- ♦ What are the primary motivators to those regions? What kinds of people/trips do they attract?
- ♦ What activities/benefits are satisfied by each?
- ♦ What cultural factors figure into the equation?



Research Objectives

c) Pinpointing The Triggers For Canada

- ♦ What is unique about Canada?
- ♦ What appeals to prospects?
- ♦ What has successfully triggered past visitors?
- ♦ What kinds of vacations hold the best potential – again not only for Canada generally, but for each of the partners as well?
- ♦ Are these products FIT? Group? Can they be packaged? How should they be priced?

d) What Are The Barriers To Visiting Canada

- ♦ Are there lingering political, social and/or health concerns undermining travel to Canada?
- ♦ Is lack of awareness, knowledge, relevant product at play?
- ♦ Negative sentiment toward the U.S.?
- ♦ The real challenge here is determining how to unlock the incredible latent demand for Canada in the UK market.
- ♦ The gulf that stands between that pinnacle and Canada's current visitor draw is immense and must be understood.
- ♦ In a later section Insignia explores in-depth the destination consideration process and elaborates on the best approach to clarifying the issues.



Research Objectives

e) Positioning Canada Effectively

- ♦ In a highly competitive marketplace Canada must be positioned effectively in order to strike a positive chord, a point of difference and to trigger an interest in travel.
- ♦ How should "Brand Canada" best be presented in the UK market?
- ♦ What is the driving brand relationship that will cause consumers to have a vested interest?
- ♦ Future advertising depends on this analysis to be effective.

f) Product Opportunities

- ♦ It is essential to get down to the nuts and bolts of marketing and pinpoint the types of specific products or packages that should be in place to appeal to each European country and to each identified target market.
- ♦ Recent research by Insignia for the Partners in the U.K. and Germany revealed the significant differences in product needs by each market. For example, Germans are eager to immerse themselves in Canada's outdoors and soft adventure. Brits are much happier with one foot out in nature and the other foot firmly planted in the security and familiarity of urban amenities and social interaction.
- ♦ Included in this analysis should be the perceptions of existing packages available to Canada – general knowledge, price, appropriateness.
- ♦ What can we learn from appealing competitive packages?

g) Planning/Booking Process

- ♦ The research must clarify:
 - ♦ Timing
 - ♦ Sources of inspiration for destination choices
 - ♦ Media influences
 - ♦ Information resources (including the internet)
 - ♦ Booking process



Research Objectives

h) Travel Trade

- ♦ Both retailers and tour operators/wholesalers can have a profound influence in where people travel.
- ♦ It is essential that they are on side:
 - ♦ Bringing the right products to market
 - ♦ Promoting them effectively with backup knowledge
- ♦ The research must explore their awareness, perceptions, motivation and product lineup.
- ♦ How to get them up to speed and onside is essential.



Methodology

Phase One: Review of Existing Data

An examination of existing available data on UK 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: U.K. 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. travellers.

Six groups (recruit 8 for 6 per group) were conducted in London. 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).

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



Methodology

	London		
	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

Phase Three: In-depth Interviews with the Travel Trade

As a great deal of the Partners' activities in the United Kingdom 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 the U.K.

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

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

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

- 8 Interviews with Tour Operators/Wholesalers
- 6 Interviews with Travel Agents/Retailers
- 1 Interview with Canadian representatives in the U.K.

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

Phase Four: Consumer Quantitative Survey

A national online panel operated by OpenVenue was conducted with 2,697 British long-haul travellers aged 18 and older from October 20 to November 15, 2007.



Methodology

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 to reach n=884 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 destination of the 884 past travellers to Canada.

B.C.	n=401
Alberta	n=281
Saskatchewan	n=50
Manitoba	n=45
Ontario	n=490
Quebec	n=215
Atlantic	n=102
Yukon	n=40
Northwest Territories	n=30
Nunavut	n=18

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

The average error range with a sample of 2,697 is $\pm 1.9\%$. This means that in 19 out of 20 cases, the results based on a sample of 2,697 will differ by no more than 1.9% from what would have been obtained by interviewing all consumers who meet the qualification criteria in the markets surveyed.



Methodology

Omnibus Survey

In addition to the online survey, a telephone omnibus survey was conducted among 949 British 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 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.



Results

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

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

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



Key Findings

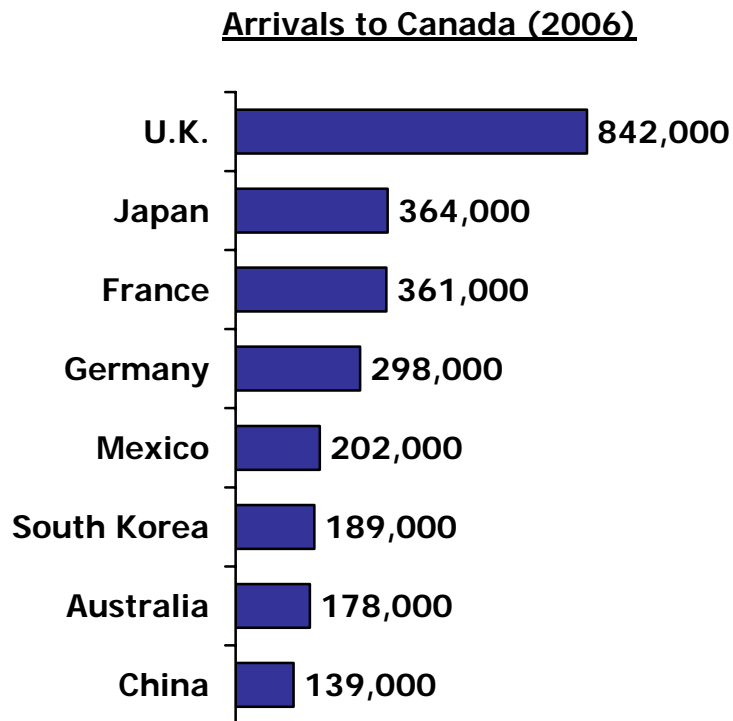


Key Findings

U.K. A Key Market

- The UK continues to be the most important foreign market for Canada, among the CTC's target countries in terms of trips arriving in Canada.

KEY FINDINGS EXHIBIT 1: TRIPS ARRIVING IN CANADA FROM FOREIGN MARKETS 2006



Source: Statistics Canada

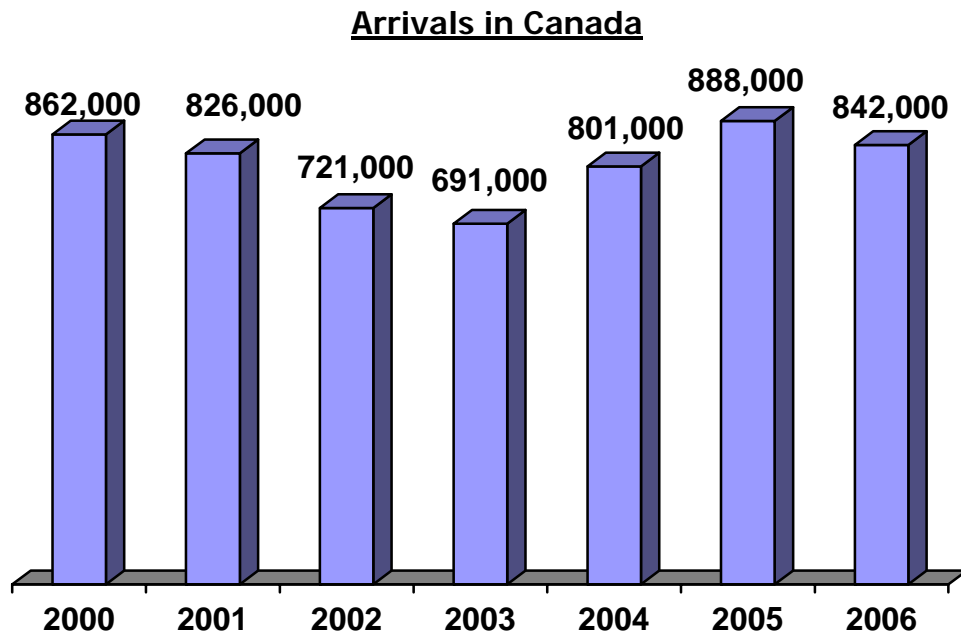


Key Findings

Trends to Canada

Tourism arrivals from the UK have regained their previous 2000/2001 levels, after plummeting in 2002/2003 due to the general unease with long-haul air travel that the 9/11 terrorist attacks caused. January to September, 2007 registers a positive 4.4% increase.

KEY FINDINGS EXHIBIT 2: UK TRIPS ARRIVING IN CANADA 2000 TO 2006



Source: Statistics Canada



Key Findings

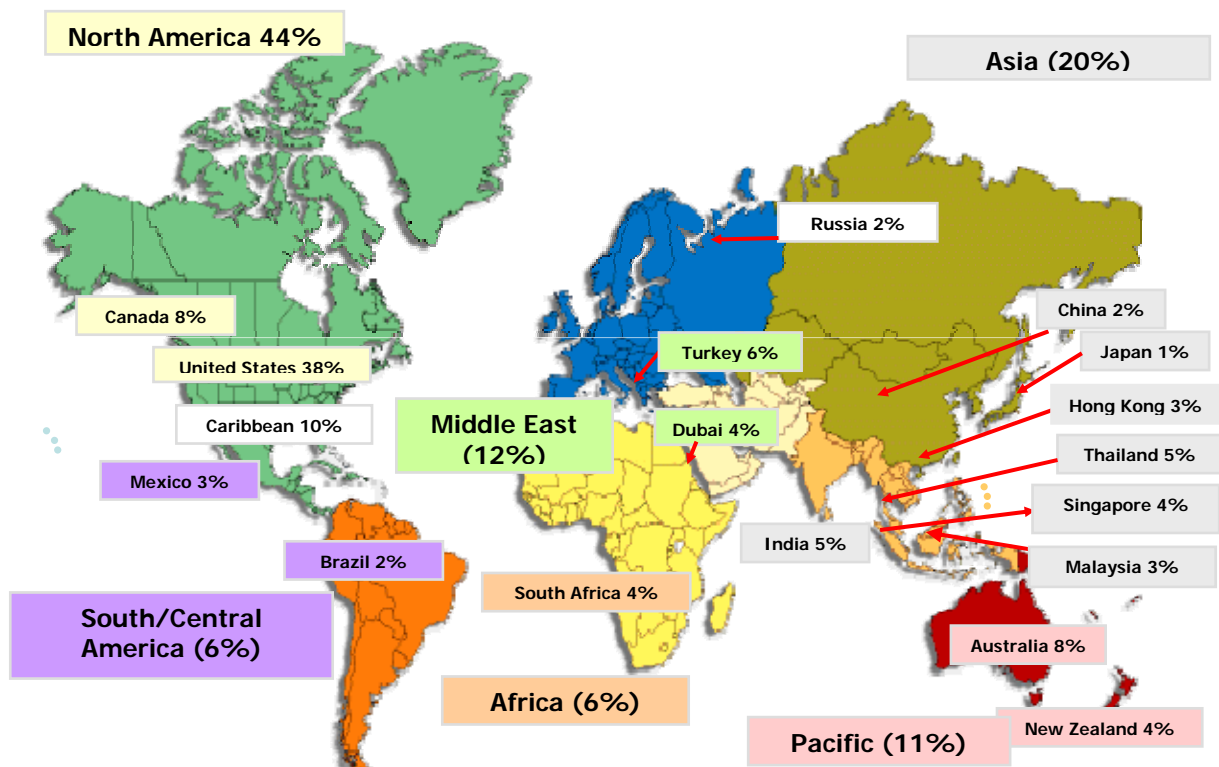
Canada in Perspective

Canada captures 8% of long-haul trips (based on most recent trip data), similar to Australia (8%).

The prime destinations are the U.S. (38%) and Asia (20%), followed by the Middle East (12%), the Pacific (11%), and the Caribbean (10%).

KEY FINDINGS EXHIBIT 3: LONG-HAUL COUNTRIES VISITED MOST RECENTLY

Long-Haul Destination on Last Trip



Key Findings

The Desired Canadian Experience

Canada is naturally high on the priority list for U.K. travellers for a number of fundamental heritage reasons:

1. Canada is part of the Commonwealth
2. It is English speaking
3. Many friends and relatives live in Canada

These strengths are shared with Australia, New Zealand, certain Caribbean countries and, with the exception of the Commonwealth connection, the U.S. All of these destinations, then, represent significant competitors.

The relatively unique selling points for Canada, beyond the heritage connection, include:

- Beautiful nature scenery
- Friendly, hospitable people
- The opportunity to experience local culture
- Much easier to get to than alternatives like Australia



Key Findings

The Barriers To Canada

The main barrier to travel to Canada is that its image is too singularly nature. U.K. travellers are highly social, they enjoy urban amenities, socializing with friends in a relaxing atmosphere, good food, good accommodation, some measure of entertainment and local culture.

The holiday concept prospective visitors typically have of Canada is an outdoor, nature viewing trip that lacks the urban side of the equation. Their trip concept is not properly balanced. The vastness of Canada is also intimidating.

As they expressed:

- ♦ *“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” (putting a doable vacation concept together)*
- ♦ *“If you have kids, that’s death” (vastness)*
- ♦ *“What’s missing is excitement, art, culture, places of interest”*
- ♦ *“East competes with West – how do I make a choice”?*

While nature is a core appeal, Brits also find it intimidating. For example, most have never been in or ever seen a kayak up close. Also, there is an awareness of bears in Canada which automatically implies that one must be careful in nature.



Key Findings

Clearly, to provide a more balanced vacation concept, Canada needs to market its nature in combination with urban amenities, both of which can be experienced in the same area, almost on the same day.

In other words, an opportunity to experience unique, grand nature but at the same time retreat to a comfortable environment with good food, quality accommodations and relaxed socializing with friends. On other days travellers can experience unique Canadian culture activities.

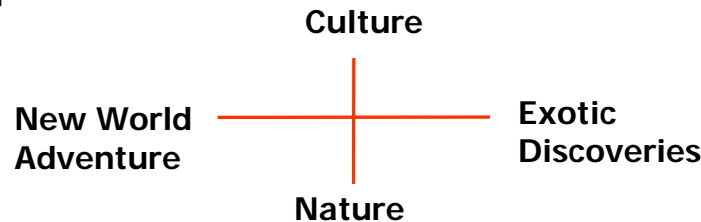
One of the higher order benefits of a visit to Canada is to feel the balance between the civility of Canadian cities in such close proximity and in harmony with an authentic, untouched (in European terms) natural environment.



Key Findings

Canada's Image vs. Competitors

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



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

Brand Positioning

Australia

Alone in the Southeast Quadrant, Australia aligns with relaxation, healthy lifestyle, with an element of exoticism from aboriginal culture.

U.S.A

This country dominates the Northwest sector and is strongly associated with modern, urban culture, luxury and a wide variety of activities.

S.E. Asia

In the Northeast quadrant, SE Asia is associated with sun, beaches and different cuisines.

Canada

Clearly entrenched in the Southwest sector, Canada aligns with the outdoors—active, spacious, clean, as well as a very safe environment.

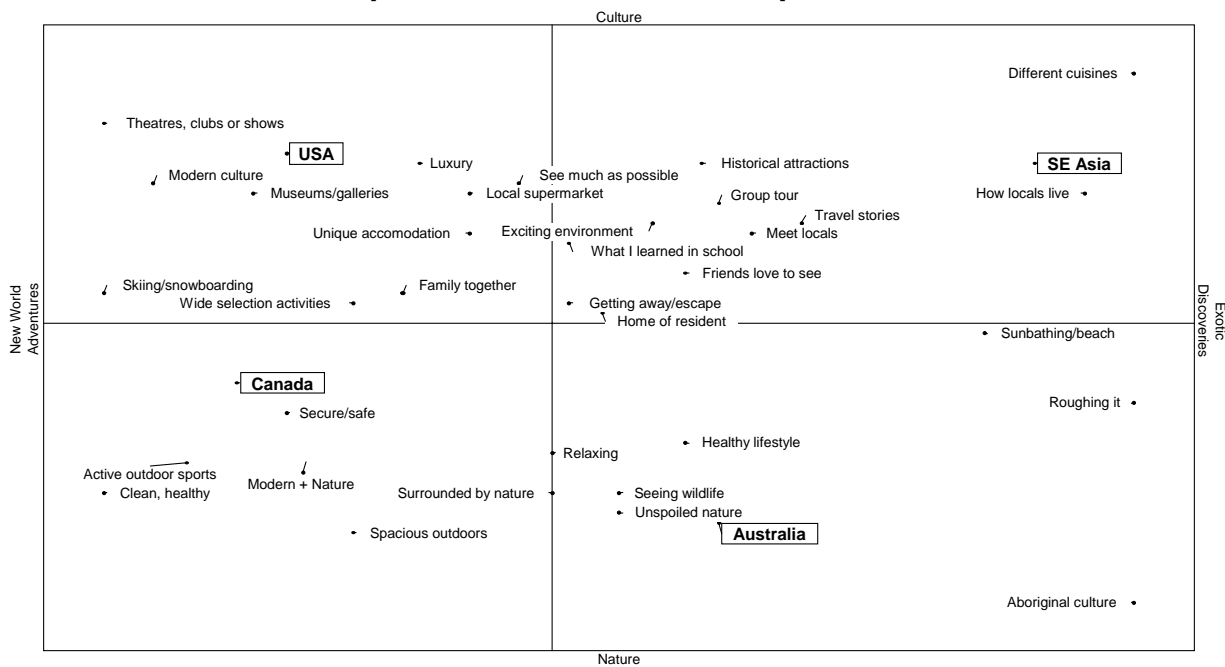
Its positioning well away from cultural activities and an exciting environment reinforces the weaknesses of the country's image discussed earlier. The strength of its nature is critical because of its importance to UK travellers, but the product concept is not balanced appropriately.



Key Findings

KEY FINDINGS EXHIBIT 4: BRAND ATTRIBUTE MAP

Perceptual Brand/Attribute Map



Key Findings

Canada's Strengths & Weaknesses

Canada's image clearly illustrates how it is well ahead of competitors in providing a natural environment, but dramatically lags in offering other benefits many consider vacation essentials.

KEY FINDINGS EXHIBIT 5: CANADA'S STRENGTHS AND WEAKNESSES VS. COMPETITORS

	Vs. U.S.	Vs. Australia	Vs. South East Asia
Canada's Strengths	<ul style="list-style-type: none"> Surrounded by beautiful, unspoiled nature Experiencing unspoiled nature Being in a clean, healthy environment Seeing wildlife in nature Attracts more historical sightseeing and experiencing communities 	<ul style="list-style-type: none"> Enjoying Alpine (downhill) skiing or snowboarding Rivers, waterfalls, autumn leaves, and glaciers 	<ul style="list-style-type: none"> Being in a clean, healthy environment Participating in active outdoor sports Experiencing a wide, spacious outdoor environment Feeling secure and safe Enjoying the convenience of the modern world while experiencing nature Surrounded by beautiful, unspoiled nature Seeing wildlife in nature
Canada's Weaknesses	<ul style="list-style-type: none"> Attending theatre, clubs, shows Sunbathing/beach activities Experiencing a modern culture Staying at luxury surroundings Visiting museums or art galleries 	<ul style="list-style-type: none"> Experiencing aboriginal culture Sunbathing or other beach activities Roughing it Wine/cultural tours Observing wildlife Visiting hot springs 	<ul style="list-style-type: none"> Opportunity to try different cuisines Sunbathing or other beach activities Experiencing local life in one area
Summary	<ul style="list-style-type: none"> Canada is way ahead in terms of a natural experience Also, Canadian history and way of life is more appealing But the U.S. provides more entertainment and luxury city stays 	<ul style="list-style-type: none"> Except on a very few dimensions Canada's image is very similar to Australia's. Canada is ahead on skiing, Australia on aboriginal attractions, beach and roughing it 	<ul style="list-style-type: none"> Canada is far ahead in experiencing a natural environment. S.E. Asia offers sun and exotic cuisine.



Key Findings

The Buy Cycle Model

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".



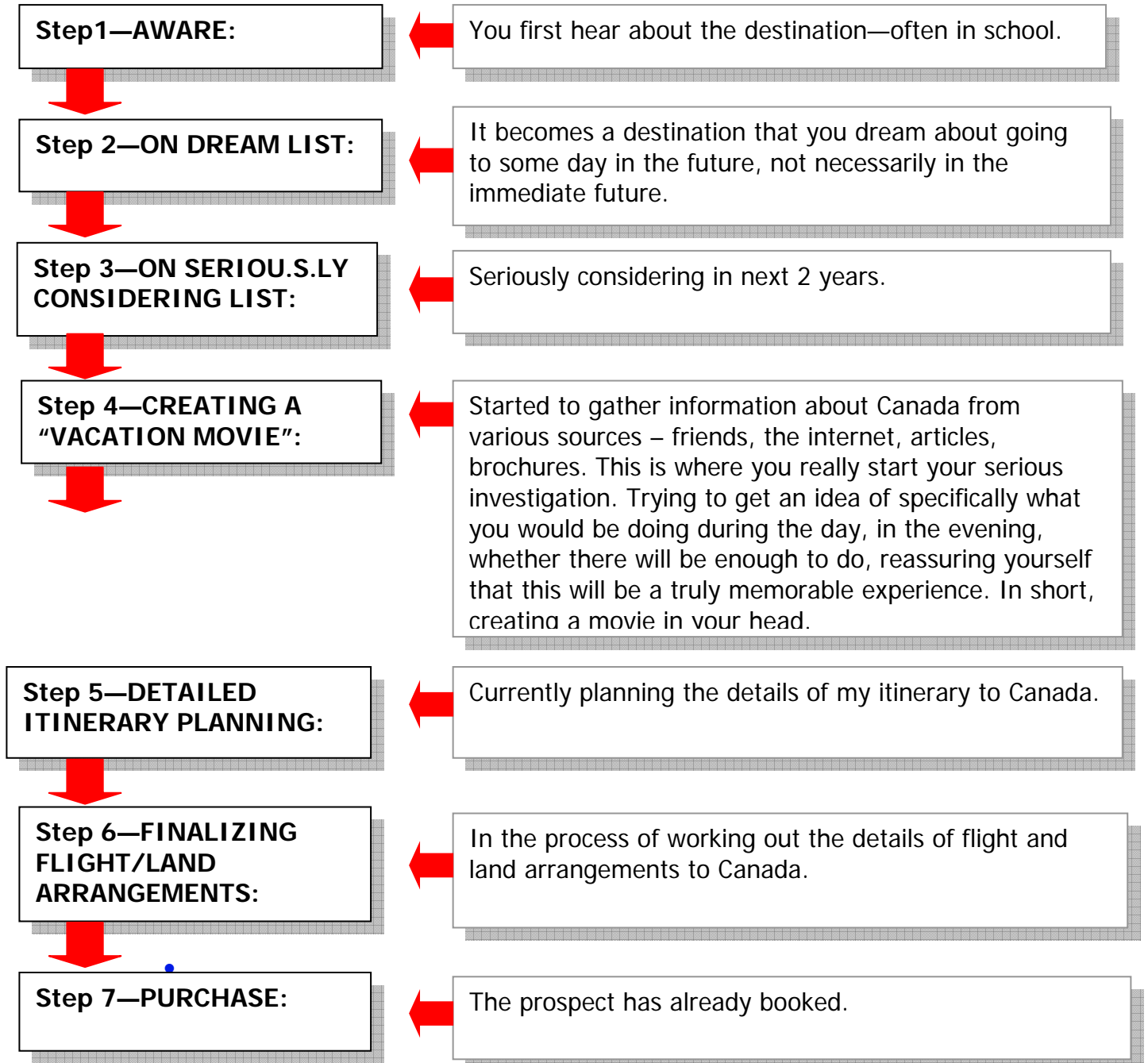
Key Findings

The Buy Cycle Model

a) How it Works

- The model is described below:

KEY FINDINGS EXHIBIT 6: BUY CYCLE MODEL — HOW IT WORKS



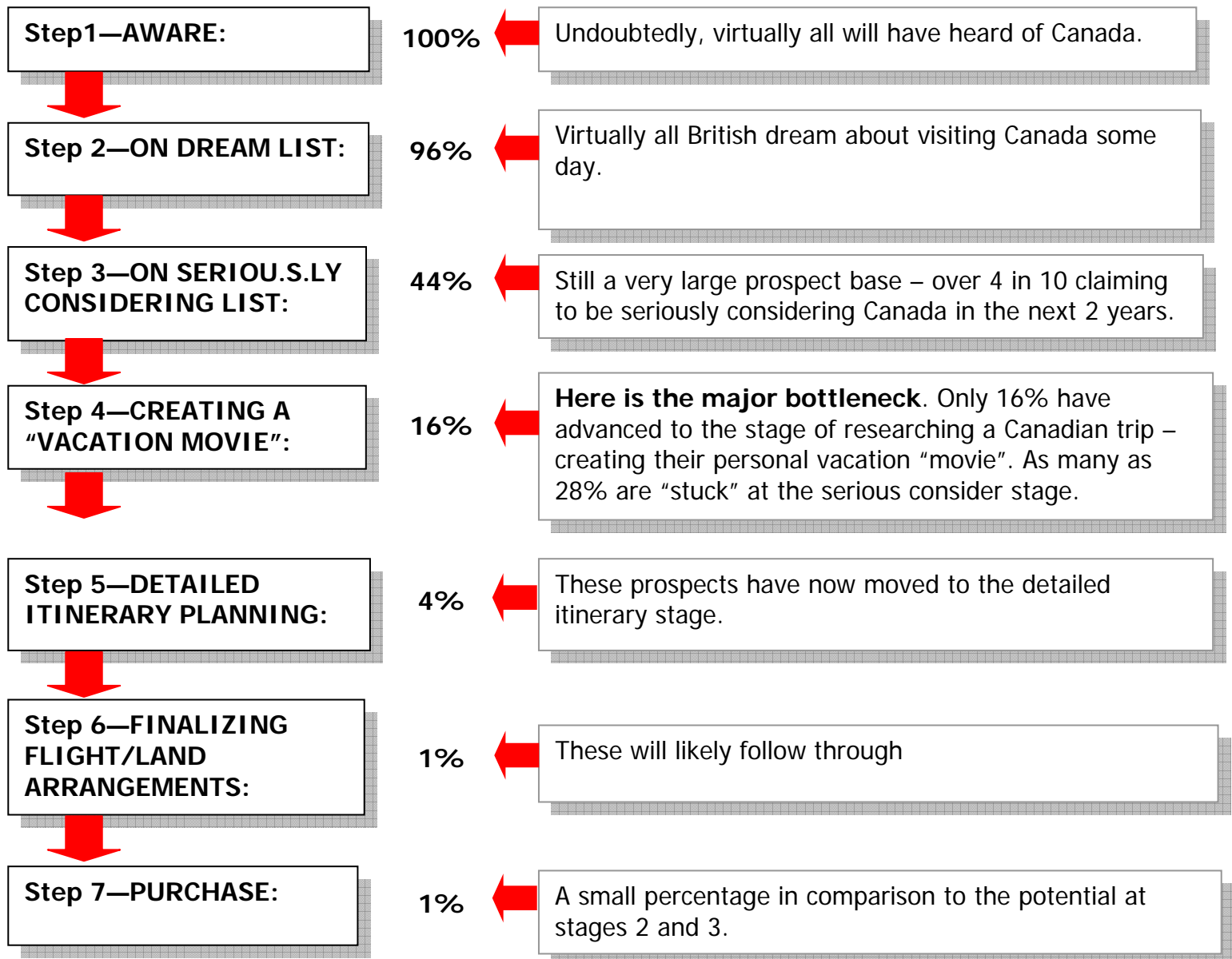
Key Findings

The Buy Cycle Model

b) Bottlenecks and Barriers – Canada

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

KEY FINDINGS EXHIBIT 7: BUY CYCLE MODEL – BOTTLENECKS AND BARRIERS - CANADA



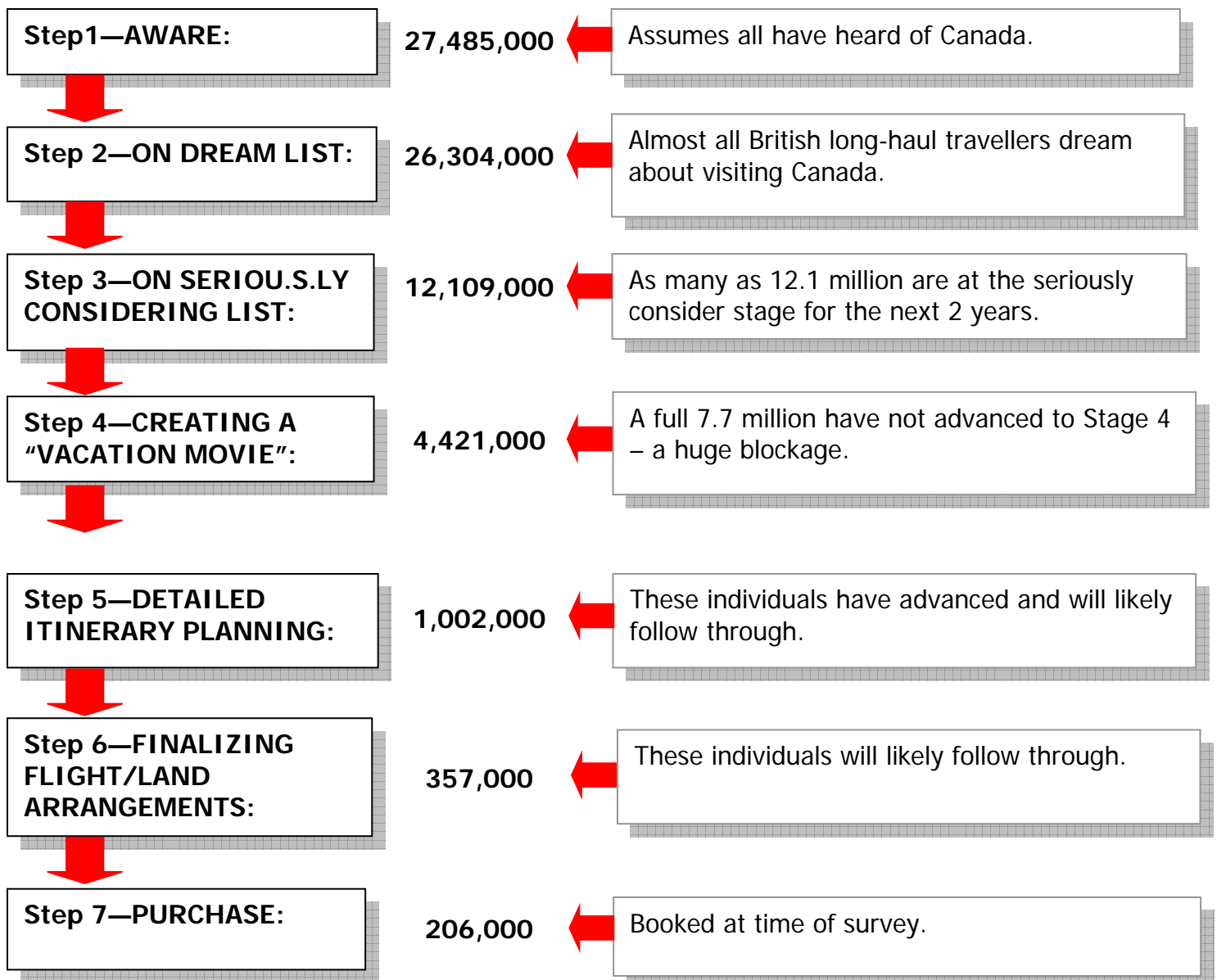
Key Findings

The Buy Cycle Model

c) Projected Market Size

- There are 27.5 million potential long-haul travellers in the U.K. out of a population of 47,634,000 age 18 and over.

KEY FINDINGS EXHIBIT 8: BUY CYCLE MODEL – PROJECTED MARKET SIZE



Key Findings

The Buy Cycle Model

Implications

The Partners need to focus more on **Stage 4** – helping serious prospects create their personal Canadian vacation movie, rather than building initial awareness, (Stage 1), getting Canada on the Dream List (Stage 2) or even on the Serious Consider List (Stage 3).

Access to Detail

To create a “movie”, prospects need access to detail – especially itinerary ideas.

- Given the importance of the internet they must be strongly encouraged to visit the most appropriate Canadian websites.
- Once on these sites they need help in creating itinerary ideas.
- Then, to elaborate on key attractions and locations on route, short video clips can work very effectively, as well as any other descriptive material that will aid the prospect in visualizing him/herself in the scene having a wonderful time.
- Blogs from past visitors are also welcome, as long as they are trustworthy as legitimate experiences by real travellers.

Viral Marketing

- Friends, especially previous visitors or residents are so highly influential that the Partners need to seriously explore viral marketing ideas.
- Ways must be developed to encourage friends or past visitors to “spread the word”.

Itinerary Ideas

- One of the reasons agent/operator brochures are popular sources of “movie” planning is because they provide itinerary ideas and help the prospects get their heads around their personal vacation concept. Consequently, advertising can focus on promising “brilliant” itinerary ideas on the Partners’ websites.



Key Findings

The Buy Cycle Model

Fighting Procrastination

- Facilitating personal “movie” creation helps the prospective visitor to stimulate themselves and drive them toward moving on their dream.
- However, industry advertising for low cost flights also helps to communicate viability (“Canada seems so much closer when the fare is so low”), as do ads featuring time specific special events.
- Procrastination is Canada’s worst enemy. Helping prospective visitors generate their own excitement is the best route to stimulating near term travel.



Key Findings

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

Five segments emerged.

Resort-Style (23%)

This segment is family vacation oriented and wanting a wide selection of activities, particularly sun and beach.

Culture Seekers (22%)

Observing the country's unique culture is a dominant interest here—especially museums, galleries, historical sites, entertainment and nightlife and local cuisine.

Relaxation (21%)

Rest and Relaxation is the common bond here.

Nature Viewing (21%)

Being in a clean, healthy and spacious environment, surrounded by beautiful nature and observing wildlife, but all within reach from an urban environment appeals to this group

Nature Participation (13%)

This group is not satisfied with visual stimuli. They want to get involved. Soft adventure prevails.

Canada's Prime Targets

- 1. Nature Viewing (21%)**
- 2. Nature Participation (13%)**
- 3. Culture Seekers (22%)**



Key Findings

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

KEY FINDINGS EXHIBIT 9: IDEAL CANADIAN VACATION — BY TARGET SEGMENT

Ideal Canadian Vacation	<u>Target Segment</u>		
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>Culture Seekers</u>
Season of travel	<ul style="list-style-type: none"> April to September 	<ul style="list-style-type: none"> April to September 	<ul style="list-style-type: none"> April to September
Multi-country visit	<ul style="list-style-type: none"> Only 44% would include U.S. 	<ul style="list-style-type: none"> Only 46% would include U.S. 	<ul style="list-style-type: none"> Only 48% would include U.S.
Duration in Canada	<ul style="list-style-type: none"> 2 weeks 	<ul style="list-style-type: none"> 2 weeks 	<ul style="list-style-type: none"> 2 weeks
Fully Independent Travel (FIT)	<ul style="list-style-type: none"> Majority 85% – package: 29%, non-package: 56% 	<ul style="list-style-type: none"> Majority 86% – package: 28%, non package: 58% 	<ul style="list-style-type: none"> Majority 83% – package: 27%, non package: 56%
Preferred regions	<ul style="list-style-type: none"> B.C., Ontario— Quebec, Alberta and Atlantic also appealing 	<ul style="list-style-type: none"> B.C., Ontario— Quebec, Alberta, Nova Scotia, Newfoundland/ Labrador and Territories also appealing 	<ul style="list-style-type: none"> B.C., Ontario, and Quebec
Preferred accommodation	<ul style="list-style-type: none"> Resorts close to nature(mountain, lakeside),as well as authentic cabins or lodges. 	<ul style="list-style-type: none"> Resorts (mountain, lakeside), city hotels relatively low on their preferred list. 	<ul style="list-style-type: none"> City hotels and resorts (mountain, lakeside).



Key Findings

Ideal Canadian Vacation	<u>Target Segment</u>		
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>Culture Seekers</u>
Preferred activities	<ul style="list-style-type: none"> • They want a wide and varied nature viewing experience. • Viewing rivers or waterfalls. • Viewing mountains • Viewing wilderness and observing wildlife. 	<ul style="list-style-type: none"> • As a younger group, these individuals share particular interest in outdoor activity. • Trail riding, canoeing/kayaking, cycling, dog sledding, snowmobiling, heli/cat skiing as well as traditional skiing and snowboarding. 	<ul style="list-style-type: none"> • They want to see the Canadian culture — taking city tours, seeing old architecture, museum and art galleries as well as getting to know local inhabitants.
<u>Segment Profile</u>			
<u>Gender</u>			
Male	50	58	45
Female	50	42	55
<u>Age</u>			
18 to 29	11	35	13
30 to 39	16	22	20
40 to 49	22	18	18
50+	51	25	49



Key Findings

Influential Media

For the British, friends and relatives are the primary source of inspiration to visit Canada (for 49% of recent visitors).

The internet used more for a planning and booking tool, is the prime source of inspiration for only 5%.

Given the strong heritage connection with Canada (58% have friends and/or relatives living there) and the sociability of British travellers, the word of mouth influence is not surprising.

What it does is remind marketers of the importance of developing viral marketing programmes.

Also, it points to the opportunity to build in the “voice” of a local friend or relative into advertising – for example:

“Come on over. You won’t believe this place”

In the case of Australia, an even higher 64% of recent trips were inspired by friends and/or relatives. It is not surprising then that Australia adopted the theme in its recent advertising: ***“Where the Bloody Hell Are You”***.

In addition to communicating friendliness and hospitality (so important to British travellers and believable for Australians), it also mimics what a friend or relative living there might say.

Trip Planning

The British plan their Canadian trips 8 months in advance and book them 5 months in advance of travel.

Only 44% book through a travel agent. Most trips to Canada are booked direct – to an airline (47%) and/or a hotel (23%)

Regardless of the ultimate retailer, as many as 63% of bookings to Canada are now made online.



Key Findings

The Travel Trade

- ♦ The key piece of learning from the UK travel trade interviews is that, according to agents, virtually all prospective visitors to Canada that contact them have **already made up their mind to visit Canada** prior to engaging them.
- ♦ In other words, while the agent may be influential in choosing the specific itinerary within Canada, they are not driving the decision to choose Canada.
- ♦ The internet is the new powerful influencer in this behavioural shift. Consumers are now empowered with a source of knowledge that they never had before.
- ♦ The implication for the Partners is that the travel trade becomes less important as a route to driving travel to Canada. The focus must now shift even more to promoting Canada direct to the consumer—especially via the net.
- ♦ On the product side. Agents strongly agree that there is not enough new product on the market for Canada, yet there are endless opportunities to expand the product offering— the countless interesting and unique experiences beyond the well known attractions (e.g. The Rockies, The Rocky Mountaineer train, Niagara Falls, Vancouver, Toronto, etc).
- ♦ These include unique nature based attractions as well as urban focused.
- ♦ Receptives confirm that clients are looking for more experiential product today.
- ♦ However, one of the major barriers to broadening the product offering lies with the operators who are reluctant to experiment with new packages unless there is proven demand in advance.
- ♦ Traditionally, with product distribution, the consumer purchased what the travel agent offered which, in most cases, was what the tour operators put together in their brochures.
- ♦ The narrowness of their offering restricts consumer appeal because many of the most exciting vacation ideas never make it to market. Receptives confirm that they have plenty of ideas, but there is real resistant by operators to pick up those product ideas.



Key Findings

The Travel Trade

1. The trend now is toward the consumer going directly to the internet (among other sources like past visitors) for ideas, less reliant on tour operator offerings.
2. This reinforces how important it is for the Partners to develop their websites and ensure that the right kind of product is available on the internet.



Key Findings

Canada's Current Visitor

The profile of Canada's current visitors from U.K. is outline below.

KEY FINDINGS EXHIBIT 10: CANADA'S CURRENT VISITOR'S PROFILE

Multi-country visits	<ul style="list-style-type: none">• 70% Canada only. In combo with U.S.-30%
Trip Duration (average)	<ul style="list-style-type: none">• Average nights on trip: 18, average in Canada:13
Season	<ul style="list-style-type: none">• May to September
Party Composition	<ul style="list-style-type: none">• With spouse (62%), alone (16%), with children (only 17%)• Average party size: 3.1 persons
FIT	<ul style="list-style-type: none">• Mostly FIT (87%)
Top Five Activities in Canada	<ul style="list-style-type: none">• Viewing rivers or waterfalls• Visiting places of historical interest• Visiting small towns• Viewing mountains• Taking city tours
Purpose of Trip	<ul style="list-style-type: none">• VFR• Enjoying natural scenery, local culture
Accommodation	<ul style="list-style-type: none">• Home of friend or relative (only 33% in spite of 58% having close contacts in Canada)• City hotels (broad price range)
Expenditure (average)	<ul style="list-style-type: none">• £ 3,300 per trip
Profile	<ul style="list-style-type: none">• London, Southeast and Scotland key markets• 43% under 40, 41% 50+• 58% close friends/relatives in Canada



Key Findings

U.K. Travel Market Trends to Canada —1997 to 2007

The following are key trends that have developed in the UK market for Canada over the past ten years.

1. **Potential Long-haul market Grows Dramatically**
 - From 13.5 million potential long-haul travellers in 1997 to 27.5 million in 2007.
 - More Brits are both interested in and have taken long-haul trips.
2. **Canada Maturing as a Pleasure Destination beyond VFR**
 - In 1997, 47% travelled to Canada mainly to visit friends or relatives. This has now dropped to 32%.
 - Staying with friends/relatives has declined from 61% to 33%.
 - In 1997, 74% of visitors had close friends or relatives in Canada. Now, it is still high but down to 58%.
3. **British Travellers Are Younger**
 - The average age in 1997 was 51 years old, now down to 44 years old, for Canadian visitors.
4. **Western Canada Growing in Appeal**
 - B.C. and Alberta now attract 44% and 31% of U.K. visits, respectively, up from 29% and 22% in 1997.
5. **Travel Agents Losing their Influence**
 - In 1997, 73% stated that travel agents were influential in their choosing Canada.
 - In 2007, only 4% said that travel agents had any role in their visiting Canada.
6. **Internet Now Dominating Booking Process**
 - In 1997, the Internet was in its infancy. In 2007, as many as 63% of trips to Canada were booked on-line—42% direct with an airline.



SWOT Analysis



SWOT Analysis

Strengths

- The U.K. economy remains healthy.
- The outbound travel market has been growing annually since 2002.
- Canadian arrivals are showing signs of recovery (January to September, 2007 at +4.4%).
- Canada ranks as high as third as a dream destination.
- Canada is part of the Commonwealth.
- The majority of Canadians speak English.
- As many as 58% of all British long-haul travellers have close friends or relatives in Canada.
- Canada's nature is highly appealing.
- A clean, healthy environment.
- Opportunity to see wildlife in nature.
- The Eastern Canada is a relatively short flight.
- The British are prepared to focus on one region, not trying to see the whole country on one trip (as do many Asians).
- Canada has a wide choice of historical and cultural attractions that would interest U.K. travellers (if they were aware of them).
- Excellent skiing and other soft adventure.
- The opportunity to personally connect with nature.
- Canada has a high value for money rating.
- The Rocky Mountaineer train (very popular).
- Solid interest in both Western Canada and Eastern Canada.



SWOT Analysis

Strengths

- Canada is considered welcoming and friendly to U.K. travellers.
- In the same geographical area, being able to experience the conveniences of the modern world while experiencing nature.
- Canada is a very popular long-haul destination.
- Nine out of ten recent travellers to Canada would recommend it to others.
- Canada has an excellent environmentally responsible rating, although it is not a destination motivator.

Weaknesses

- Canada is so vast it can intimidate those without a clear view of a future itinerary.
- Canada is cold in winter.
- Many believe there is an absence of cultural attractions.
- Prospects do not have a clear vision of a balanced Canadian vacation (nature plus culture and urban).
- Distance is often perceived as greater than reality.
- Existing brochures focuses too much on scenery and not enough people, culture, socializing and a sense of fun.
- The U.S. provides a much greater array of cultural activities and excitement – shopping, night life and entertainment.
- Existing packages are too narrow and limited to traditional product.
- Nature can be intimidating (especially the fear of encountering bears).
- Enormous latent demand (12.1 million British are seriously considering a Canadian trip in the next 2 years. Only 1.0 million have advanced to the itinerary planning stage). The CTC's current budget may be too low to effectively stimulate this demand.



SWOT Analysis

Opportunities

- Positioning Canada as a broader experience than just nature – including urban activities, cultural experiences.
- Building on warm, hospitable, friendly people image.
- Leverage the friends and relatives connection.
- Provide FIT travellers with add-on itinerary ideas.
- Sell Toronto as alternative to NYC for pre-Christmas shopping.
- Promoting Canada as a family destination – educational nature based experiences, ranch/farm stays, etc.
- The Partners need to work more closely together to create synergy (trade).
- Focus on the unique attractions in Atlantic Canada and how close it is.
- Assist the 12.1 million British seriously considering Canada in the next 2 years to create their own vacation “movie” and advance through the Buy Cycle.
- Improvements to the official websites to assist vacation planning.
- Ensure high placement of CTC/partner sites on the dominant word search engines.
- More itinerary ideas for the dominant FIT traveller.
- The prospective British visitors typically want to focus on specific regions of Canada, so provide regional itineraries.
- Provide films for television travel shows, an influential medium.
- Providing more trip modules (i.e. add-on vacations) which are growing in popularity among FIT travellers.

Threats

- The strengthening of the Pound against the American dollar may encourage greater British travel to that country.
- As the travel trade becomes less influential in the decision to travel to Canada (due largely to the internet’s influence), the ROI of CTC funds directed to the trade may diminish.



The Way Forward: Considerations



The Way Forward: Considerations

There are 8 key areas that the Partners should focus on to accelerate market growth within the UK.

- 1. Reposition The Canadian Brand to Broaden Appeal**
- 2. Positioning Pitfalls To Avoid**
- 3. Break The Buy Cycle Bottleneck**
- 4. Enhance User Friendly Websites**
- 5. Campaign Needed To Drive Prospects to the Websites**
- 6. Influential Media**
- 7. Trade Support**
- 8. New Product Must Be Brought To Market**



The Way Forward: Considerations

1. Reposition The Canadian Brand To Broaden Appeal

The Appeal of Canada

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

Barriers to Canada

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.



The Way Forward: Considerations

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”?*

The Ideal Positioning

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.



The Way Forward: Considerations

2. Positioning Pitfalls to Avoid

Do's	Don'ts
<ul style="list-style-type: none">♦ 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.)	<ul style="list-style-type: none">♦ Overly emphasize Canadian cities<ul style="list-style-type: none">♦ 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<ul style="list-style-type: none">♦ Europeans are intimidated by remoteness, bears – too scary.♦ Use images that would be considered cliché—not unique to Canada

3. Break The Buy Cycle Barrier

a) The Buy Cycle model

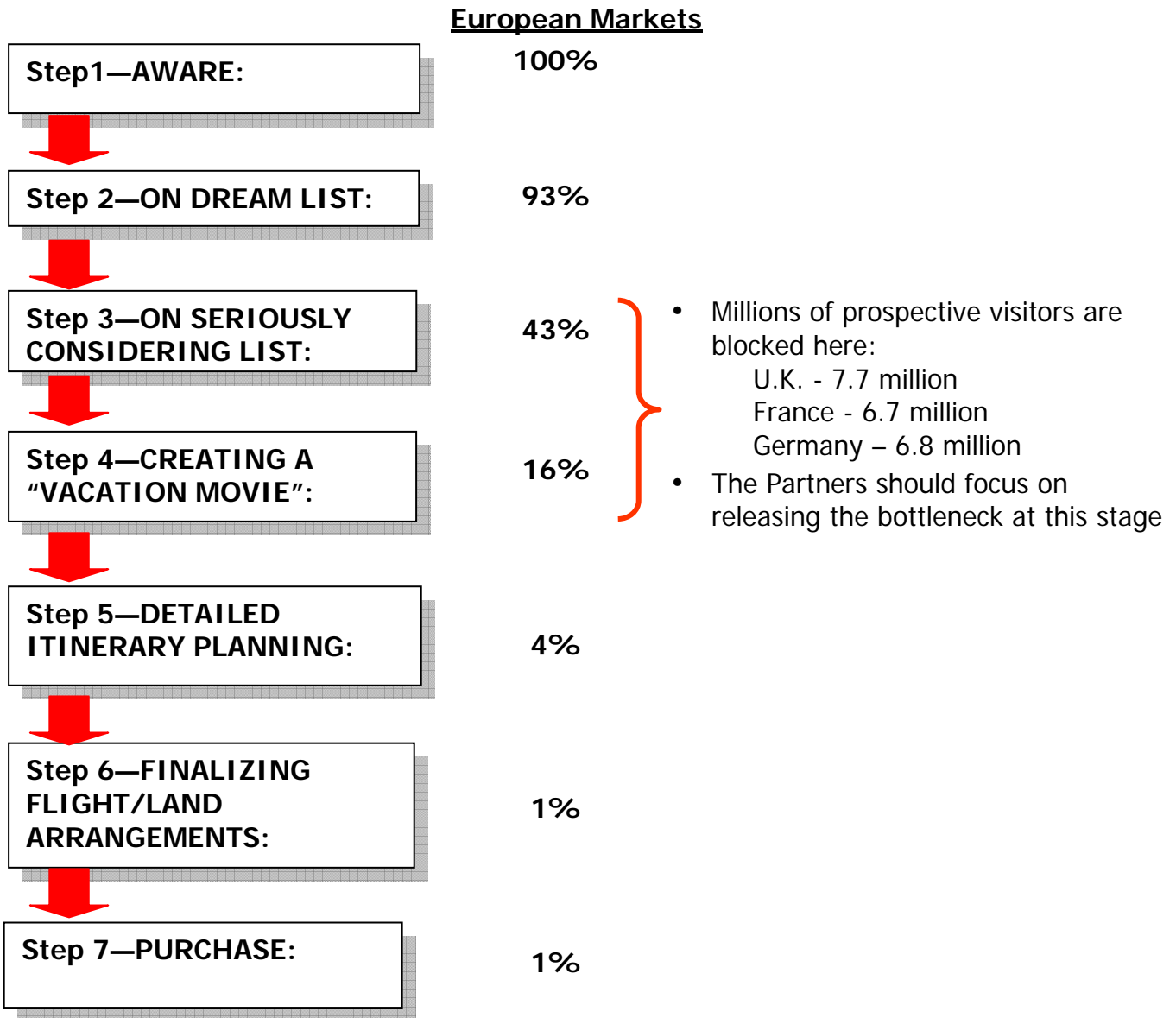
- ♦ Insignia's Buy Cycle Model has now been validated by Insignia in 6 countries:
 - ♦ China
 - ♦ South Korea
 - ♦ Taiwan
 - ♦ UK
 - ♦ France
 - ♦ Germany
- ♦ In all markets travellers can relate to the path to purchase process.
- ♦ Buy Cycle a 7-step model.



The Way Forward: Considerations

Buy Cycle Model

KEY FINDINGS EXHIBIT 1 1: BUY CYCLE MODEL — EUROPEAN MARKETS



The Way Forward: Considerations

What Are The Components of The Ideal Movie?

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

Where Do 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.



The Way Forward: Considerations

4. Enhance User Friendly Websites

The Partners Should Enhance User Friendly Websites

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

Website Report Card

The Insignia team evaluated the 26 key sites provided by provincial/territory partners for the online Forum sessions

Only 1 in 26 scored Excellent or Acceptable on all 5 criteria
(www.earthrhythms.ca)

Criteria	Excellent	Acceptable	Poor	N/A
1. Ease of finding visuals	9	6	6	5
2. Ease of finding suggested itineraries	8	7	3	8
3. Ease of finding route maps	8	8	5	5
4. Ease of trip planning	8	7	6	5
5. Ease of linking to online community (including RSS feeds)	4	1	--	21



The Way Forward: Considerations

5. Campaign Needed To Drive Prospects to the Websites

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

Hence, the Partners should continue with its advertising/promotional campaign to drive highly serious prospects to their website(s).

The campaign 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. Influential Media

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.



The Way Forward: Considerations

7. Trade Support

Fact

With internet booking soaring, agents see their future survival depending on 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 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 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.



The Way Forward: Considerations

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.

8. New Product Must Be Brought to Market

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 (38% for the U.K., 36% for German and 49% for French trips to Canada), 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



The Way Forward: Considerations

A type of product of particular interest to FIT travellers is a 2 or 3 day add on excursion to their core vacation.

- ♦ In other words, for the FIT visitor to Toronto and Niagara Falls, a 2 day side trip to the Prince Edward County wine region or hiking near Georgian Bay, for example.
- ♦ For the FIT visitor to Vancouver, a side trip to Tofino, the Gulf Islands, Whistler, or the Okanagan, for instance.

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

Top Five Priorities

1. Encourage the industry to redesign their websites to make it easy for prospective visitors to create their own “movie”
2. Continue campaigns to drive prospects to the websites promising them that they can easily create their own dream vacation to Canada
3. Ensure that the core CTC campaign is customized enough to reflect unique market needs
4. Ask the agency for suggestions for a viral marketing programme building on the powerful VFR linkage with Canada
5. Consider co-op campaigns with travel agencies who have promotional programmes beyond their own offices



Findings in Detail



Travel Trends



Section 1: U.K. Economic Outlook



1.1 Economic Overview

GDP:	1,301,914 million pounds (\$2.1 trillion PPP)
Inflation:	2.3%
Exchange:	1 pound = 2.18 Canadian Dollars (avg. to Nov. '07)
Population:	60,622,964
Unemployment:	5.3%
Leave Entitlement:	23 days
2008 Issues:	Domestic pricing concerns and lending issues point towards economic slowdown. The pound is weakening slightly and a high degree of uncertainty about the housing market and other economic issues is reducing consumer confidence. Use of disposable income on luxuries (such as travel) is likely to decrease in 2008, in response to the uncertainty, but as the situation becomes clearer towards the end of next year will most likely resume as the UK has a strong economic base and no long term difficulties in economic structure.
Overall:	Strong, but with uncertainty ahead

Currently, the UK has one of the highest economic growth rate of the G7 countries (average 2.6% between 2002 and 2006 vs. France 1.7% and Germany 0.9%). With an efficient economy backed by a strong manufacturing segment and a currency that, despite recent devaluation, still trades strongly, the UK economy has a solid base.

This is reflected on the individual level, with Cdn\$49,196 as the preliminary average disposable income among the workforce in 2007. This figure represents money for luxury items as well as what can be contributed to savings.

However, 2008 will be a period marked by a high degree of uncertainty in the UK market. An economic slowdown linked to lowering interest rates and the softening of the housing market is negatively impacting consumer confidence. With no clear forecasts in terms of the housing market's performance, consumer confidence is expected to remain low until events of 2008 settle the matter.

Given that, GDP growth is expected to be lower than in previous years. There are no expectations of increased inflation or unemployment. The UK economy should remain strong during the slowdown and ready to pick back up as consumer confidence increases and growth stabilizes.



1.2 Population and Demographics

The UK is the third most populous country in the European Union (behind Germany and France). Recent population growth has been driven largely by immigration; however increased life expectancy and a rising birthrate have also played a significant part.

While the current fertility rate of 1.86 is below replacement level, it is up from the low of 1.63 in 2001. This is largely attributed to immigrant mothers and expected to continue. As a result, the aging of the population seen in most western countries is not as pronounced in the UK.

EXHIBIT SECTION 1-1: UK POPULATION BY AGE - 2000 TO 2006

	2000	2001	2002	2003	2004	2005	2006
Under 5	3,546,277	3,482,415	3,423,407	3,392,736	3,400,748	3,439,350	3,507,009
5 to 9	3,799,548	3,740,495	3,690,751	3,648,287	3,606,725	3,554,000	3,481,776
10 to 14	3,853,786	3,885,033	3,901,148	3,889,875	3,862,598	3,813,900	3,748,735
15 to 19	3,642,198	3,687,328	3,763,662	3,855,987	3,931,147	3,983,300	4,014,223
20 to 24	3,515,089	3,578,581	3,646,554	3,734,526	3,831,276	3,932,850	4,063,044
25 to 29	4,044,992	3,911,342	3,773,226	3,692,605	3,693,002	3,760,050	3,875,133
30 to 34	4,595,433	4,551,490	4,490,837	4,398,487	4,280,110	4,152,500	4,028,979
35 to 39	4,594,310	4,661,099	4,698,768	4,704,413	4,682,032	4,644,050	4,587,546
40 to 44	4,074,923	4,182,065	4,290,601	4,394,550	4,497,299	4,587,150	4,650,583
45 to 49	3,745,401	3,762,128	3,807,894	3,868,653	3,943,744	4,037,400	4,148,565
50 to 54	4,010,904	3,980,281	3,868,985	3,756,129	3,695,750	3,673,650	3,690,609
55 to 59	3,262,712	3,423,326	3,629,311	3,785,092	3,863,095	3,893,850	3,856,370
60 to 64	2,890,487	2,889,663	2,901,600	2,945,803	3,019,460	3,116,550	3,273,791
65+	9,316,459	9,373,444	9,440,918	9,501,636	9,572,732	9,637,800	9,696,654
Total	58,892,514	59,108,687	59,327,658	59,568,776	59,879,864	60,226,500	60,622,964

Source: EuroStat



1.3 Exchange Rates

The pound exchanges favourably, particularly with key long-haul destinations for the UK (particularly English speaking destinations). While there has been some weakening of the pound against the Canadian dollar, the exchange rate is still favourable.

In addition, the purchase power of the pound at home is relatively low. Items often cost the same number of pounds in Britain as they would in dollars in Canada. Thus, when going abroad to destinations such as Canada, a pound stretches almost twice as far.

EXHIBIT SECTION 1-2: POUND EXCHANGE RATES 2000 TO 2006

Currency	2000	2001	2002	2003	2004	2005	2006
U.S. Dollar	1.52	1.44	1.50	1.64	1.83	1.82	1.84
CAD Dollar	2.25	2.23	2.36	2.29	2.38	2.21	2.09
AUD Dollar	2.61	2.79	2.77	2.52	2.49	2.39	2.45

Source: FXHistory, from Interbank Rates



1.4 Economic Trends

As mentioned earlier, the UK economy has had a solid growth rate built on a strong manufacturing section contributing to the economy. While GDP and Disposable Income continue to increase at good rates and unemployment remains relatively steady, inflation has been increasing. A mix of consumer price inflation and uncertainty about the housing market has not yet made its mark on the UK economy, though the forecasts are not overly negative.

The UK does not face any major difficulties in terms of overall structure of the economy, labour market, or financial sector. It is tied to the economic health of the rest of the EU even though it has not adopted the Euro. As a result, the general slowdown predicted for the EU will impact the UK as well. However, in the past the UK has shown growth over the EU average and otherwise demonstrated a vigorous economy.

EXHIBIT SECTION 1-3: UK ECONOMIC INDICATORS TRENDS

Indicator	2000	2001	2002	2003	2004	2005	2006	2007(p)
GDP Growth (% over last year)	3.8	2.4	2.1	2.8	3.3	1.8	2.9	3.1
Gross National Disposable Income per person (Converted to CAD\$)	39,180	40,359	42,274	40,506	43,452	44,630	46,692	49,196
Inflation	.8	1.2	1.3	1.4	1.3	2.1	2.3	-
Unemployment	5.3	5.0	5.1	4.9	4.7	4.8	5.3	-

Source: National Statistics Online, EuroStat (project)



Section 2: Outbound Travel Trends



2.1 Size of Potential Market

The U.K. potential long-haul travel market has doubled in size since 1997, largely due to more U.K. residents either having travelled abroad in the past 3 years or seriously intending to in the next 2 years.

EXHIBIT SECTION 2-1: UK LONG-HAUL MARKET TRENDS

<u>UK Long-Haul Market Trends</u>		
	<u>1997</u>	<u>2007</u>
Adult population	46,000,000	47,600,000
Incidence of long-haul travel*	29.4%	57.7%
Projected market size	13,506,000	27,485,000

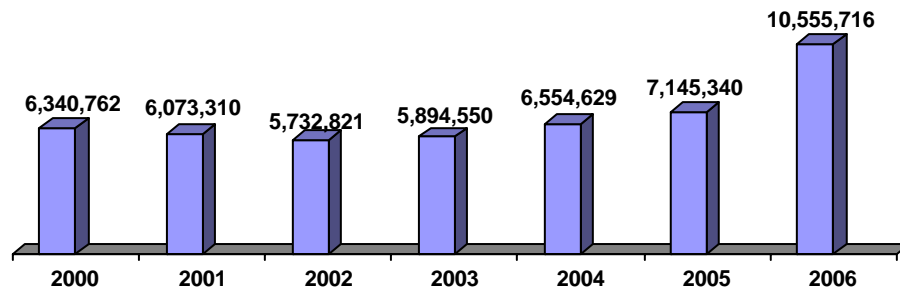
Source: CTC Surveys 1997¹

¹ * Travelled beyond Europe in the past 3 years or seriously intend to in next 2 years.



2.2 Long-haul Market Size

EXHIBIT SECTION 2-2: UK LONG-HAUL¹ TRIPS — 2000 TO 2006



Source: EuroStat

UK holiday visits abroad to non-European destinations increased by 66.5% from 2000 to 2006. While the UK shared a 2002-2003 low point with other European markets, it picked up again most rapidly and has sharply increased in the past 3 years to a current level of 10.6 million long-haul trips. The long-haul market shows steady growth from 2002 on, and is likely to remain a healthy size (10 million+).

Given the strong interest in international destinations in the UK, significant drops due to world events are unlikely to be persistent. Likewise, any decreases seen in 2008 due to the housing market slowdown are likely to be limited to the start of the year as consumers adjust.

¹ Definition used is the sum of outbound trips to the Americas, Asia, Africa, and Oceania.



2.3 Travel Trends

Looking at major destination regions, no losers emerge between 2000 and 2006. The smallest gains were seen in the well developed markets of the Americas, with Asia and Oceania showing the greatest gains and Africa close behind. Africa's tourism destinations are improving infrastructural offerings while prices remain reasonable.

This overall increase was mostly seen between 2004 and 2006, with 2005 to 2006 showing a sharp spike.¹

EXHIBIT SECTION 2-3: DESTINATION CHANGES 2000 vs. 2006

	2000	2006	% Change
North America	2,996,798	3,353,816	+11.9
Central and South America	975,558	1,357,543	+39.2
Africa	1,019,509	2,203,637	+116.1
Asia	1,078,784	2,942,962	+172.8
Oceania	270,113	697,758	+158.3

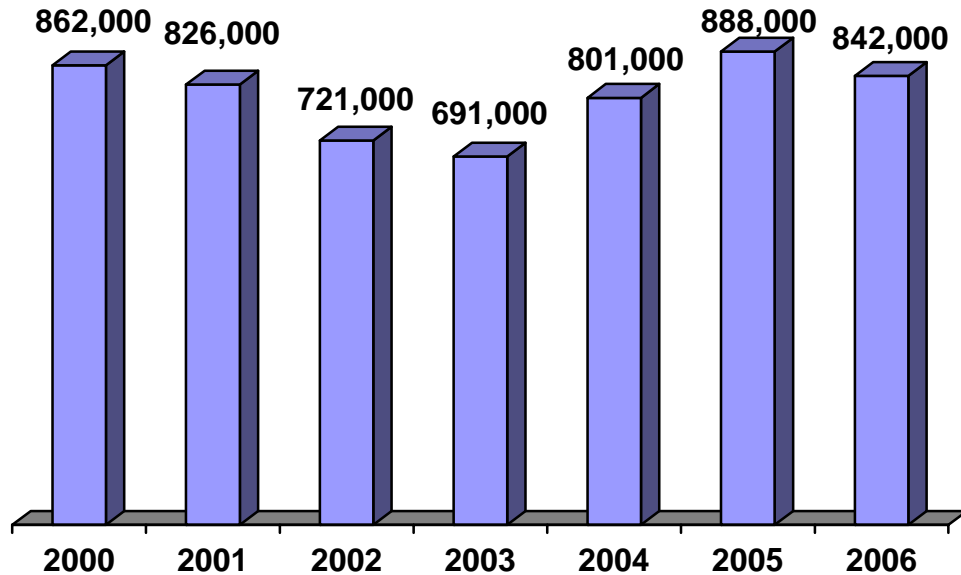
Source: EuroStat

¹ The 2006 EuroStat numbers were updated in January 2008.



2.4 Arrivals in Canada

EXHIBIT SECTION 2-4: UK TRIPS ARRIVING IN CANADA 2000 TO 2006



Source: Statistics Canada

UK arrivals in Canada have decreased by 2.3 percent since 2000. However, the interim period indicated sharp decline into 2003, followed by a strong bounce back with a peak in 2005. The drop from 2005 to 2006 is not necessarily indicative of the start of another overall decline, and may reflect British travellers going to Germany for the world cup. Supporting this is the 4.4% increase in UK arrivals in January to September 2007 compared to the same period in 2006. Using only 4% as a projection of 2007's growth over 2006 would yield 876 thousand UK arrivals in Canada, not as high as 2005's peak, but above those of 2000.

Comparing outbound trends, the number of UK residents declaring Canada as their primary destination indicates an increase of 57.5%. This indicates that while more people are stating that Canada is the primary reason they are travelling, there are fewer overall actually engaging in travel to Canada.



Consumer Surveys – Qualitative and Quantitative Analyses



Section 3: Destination Motivators



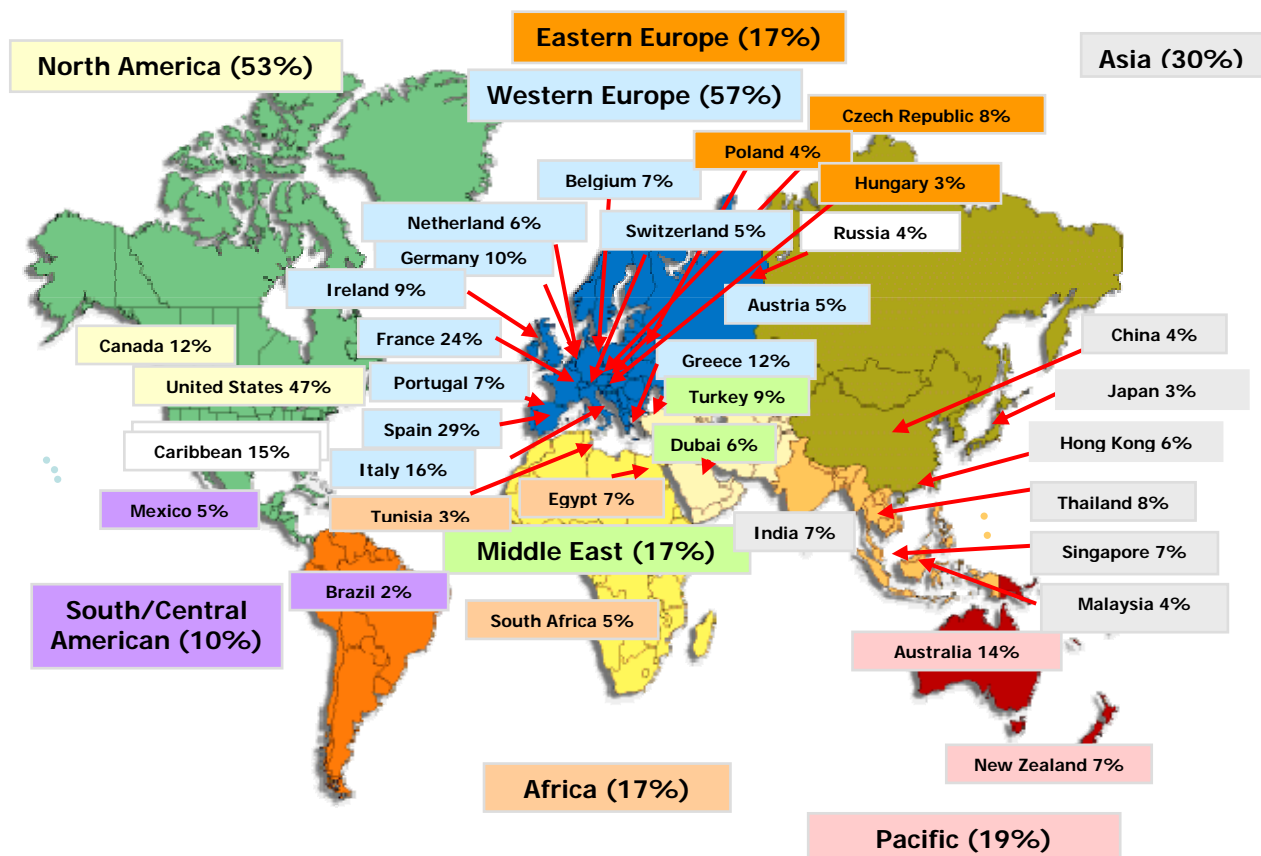
3.1 Current Destinations Outside Home Country (Past 3 Years)

Long-haul travellers take many trips within the EU—in the past 3 years Western Europe (57%), particularly France (24%), being highly popular.

Among long-haul destinations, the U.S. (47%) and Asia (30%) dominate.

Canada attracted a significant 12%, similar to Australia (14%), during the past 3 years.

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



Source: Quantitative Survey Q7¹

¹ Base=Past 3 year long-haul traveller (n=2,232)

Q.7 During the past 3 years which of these countries or destinations outside **United Kingdom** did you visit for pleasure and stayed for 3 nights or longer with at least one night in paid accommodation, if any?



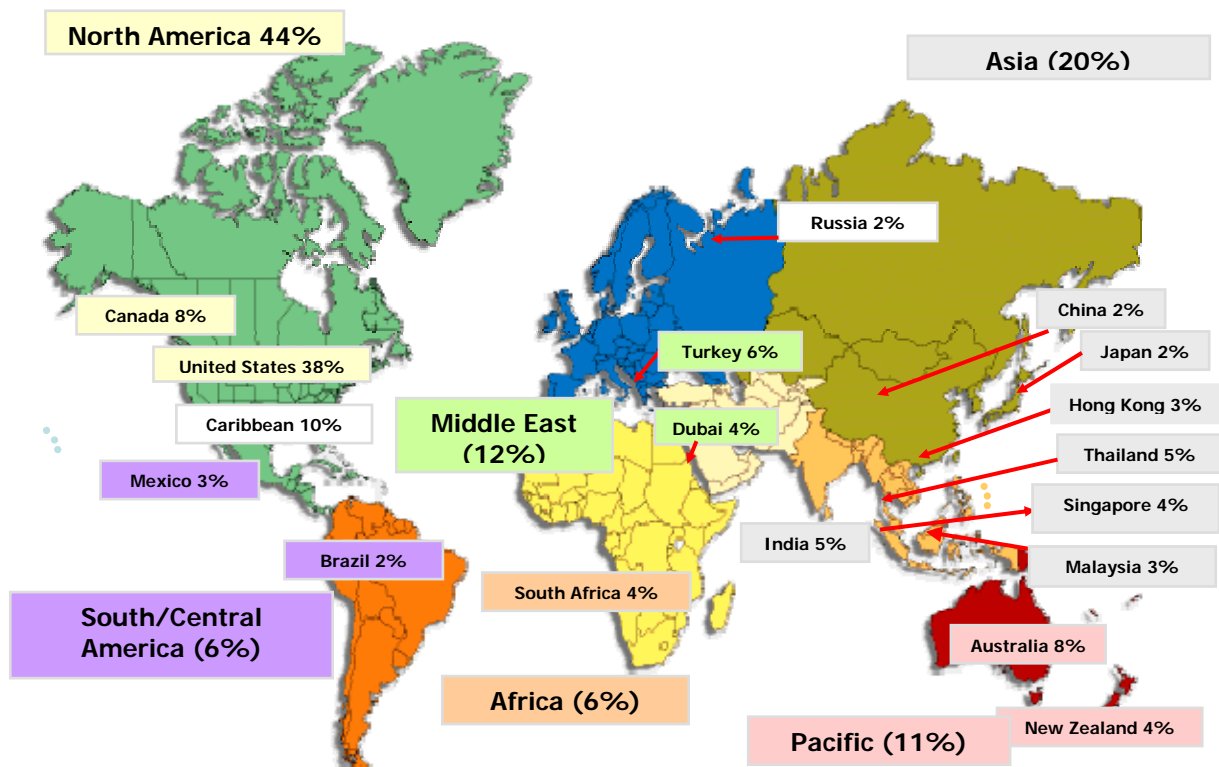
3.2 Long-Haul Destination Market Share

Canada captures 8% of long-haul trips (based on most recent trip data), similar to Australia (8%).

The prime destinations are the U.S. (38%) and Asia (20%), followed by the Middle East (12%), the Pacific (11%), and the Caribbean (10%).

Since the survey was conducted in the fall, there is a potential bias toward the recent (summer/fall) season travel. However, since travellers typically only take one long-haul trip per year (average for past 3 years under 3 - see Exhibit 6-1), the bias is unlikely to be significant.

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



Source: Quantitative Survey Q8¹

¹ Base= those who have taken a most recent trip (n=2,232)

Q.8a Thinking about your **most recent** pleasure trip of 3 nights or longer with at least one night in paid accommodation to somewhere **beyond the European Union countries, North Africa and the Mediterranean**, which of these places did you visit on that trip?



3.3 Long-Haul Destination Trends

Trend data from 1997 reveal a growing interest in Asia, with a decline in travel to Australia.

EXHIBIT SECTION 3-3: DESTINATION TRENDS — MOST RECENT TRIPS

	<u>1997</u>	<u>2007</u>
	%	%
<u>Destination Most Recent Trip</u>		
U.S.	38	38
SE Asia / Far East	16	20
Australia	13	8
Other Asia	10	14
Caribbean	9	10
Canada	8	8
Other Africa	6	2
New Zealand	5	4
Central/South America	4	6
South Africa	4	4
Mexico	1	3

Source: CTC survey 1997



3.4 Destination Imagery – Focus Group Feedback

1. Canada's Image

a) Strengths

- ♦ The appeal of Canada is rooted in nature without question.
 - ♦ Rockies
 - ♦ Beautiful lakes
 - ♦ Wildlife (with a particular fascination for bears)
 - ♦ Tranquility
 - ♦ Clean
- ♦ The vastness is a double edged sword – on one hand very appealing to a geographically and physically “compressed” society, yet discomfoting in terms of how to deal with it – especially wanting a vacation concept devoid of long stretches of “emptiness” figuratively and in reality.
- ♦ Canada's English heritage factors (English speaking, Commonwealth and the presence of many friends and relatives) are major pulls as well.



3.4 Destination Imagery – Focus Group Feedback

b) Picture Sort

- ♦ The scenes that appeal most to U.K. residents (among over 50 scenes shown) relate to the outdoors but also interesting and comforting city scenes and unique cultural experience.



3.4 Destination Imagery – Focus Group Feedback

c) Canada's Weaknesses

- ♦ Negative comments, particularly by those who have not been to Canada (yet have it on their dream list):
 - ♦ Cold, especially in winter
 - ♦ A cultural vacuum
 - ♦ Could be boring
 - ♦ Nature by itself doesn't cut it, it needs to focus on culture as well
 - ♦ Scale is so massive
 - ♦ Lack of culture
 - ♦ Need to know more about its history
 - ♦ Needs to bring nature and the cities together (As the travel trade noted, the Rockies, the Rocky Mountaineer train and a few days in Vancouver is by far the most popular itinerary and does successfully combine urban and rural).

2. Barriers to Canada

- ♦ A number of international surveys place Canada very high on the "Dream List" – often first or second globally. This is the case in the U.K., Canada has a magical draw which makes it a "must see" at some point in their lives, largely because of its nature beauty and aspirational environment. In the U.K., the Rockies is the single most appealing icon.
- ♦ However, the number of individuals who are in the process of planning a visit, and/or who eventually visit, drops off extremely sharply. **Clearly, there are significant barriers that block the Canadian dream visit from becoming a reality.**
- ♦ This research has uncovered what the core issues are:
 1. Without doubt, the number one reason for the dream not becoming a reality is that prospective travellers do not have a clear concept of a vacation in Canada.
 - ♦ They know there is amazing nature beauty but "what else is there to do" – especially on the infrastructure and culture side.



3.4 Destination Imagery – Focus Group Feedback

- ♦ As they expressed:
 - ♦ *“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” (putting a doable vacation concept together)*
 - ♦ *“If you have kids, that’s death” (vastness)*
 - ♦ *“What’s missing is excitement, art, culture, places of interest”*
 - ♦ *“East competes with West – how do I make a choice”?*
- ♦ Many want to try soft adventure. Others simply want to observe. Regardless, Canadian nature can be scary.
- ♦ As the trade noted “most Brits have never seen anyone in a Kayak before”. They have no idea of how easy or difficult it is.
 - ♦ Bears are very, very appealing. Most want to see them in nature, but are also very aware that there are dangers.
- ♦ Further, most U.K. travellers are highly social and want the comforts of good dining, sociability and good accommodation. Consequently, it becomes critical to communicate that nature can be observed (or participated in) safely with a warm, friendly and comforting infrastructure close at hand.
- ♦ The current impression of many is that they are not certain of the availability of a **balanced** vacation.
- 2. The country is so vast that many do not know where to start and, hence, simply defer the decision to go. Current travellers are buying regional based trips (see travel trade comments). The U.S. is purchased on a regional basis – New York, Boston, or Florida, for example. Consequently, Canada needs to be sold regionally to help formulate viable vacation concepts.



3.4 Destination Imagery – Focus Group Feedback

3. Brits really like the comfort of an English speaking country. Quebec appears to have limited appeal to many because they may have to speak in French.
- The bottom line is that the decision to act on the “dream” of a Canadian vacation is easily deferred, as long as it is taken before *“I am too old and my health won’t permit it”*.
- The key barrier 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. And, reassurance that the Canadian “wilderness” can be experienced safely and easily.
- However, while it is important to reassure travellers of good restaurants, accommodation and sociability, they still need to know what is **unique** about Canada beyond spectacular nature. As discussed later, this can include aboriginal culture experiences, driving in a unique natural setting, polar bear viewing, dog sledding, etc.

3. Building Better Product

a) The Ideal Trip

- ♦ When group participants described their ideal trip, it invariably included elements of nature and of infrastructure. For some, the ideal experience leaned toward nature and involvement, for others toward cultural experience, but always with a significant dose of Canada’s unique nature.
 - ♦ *“Seeing nature and shopping, visiting art galleries, museums, gardens and theatre”*
 - ♦ *“One or two big cities, museums, a few days in the Rocky Mountains. Then my cultural spirit needs to be fulfilled”*
 - ♦ *“I’d like to see the first nations– but (authentically), not through a museum with people dressed up as natives”.*
 - ♦ *“Want some city life and remoteness”*
 - ♦ *“On a motor bike like in Easy Rider (freedom), stopping in towns to get fed (comfort) and safe travel through the countryside (safety)”*



3.4 Destination Imagery – Focus Group Feedback

b) The Perfect Day

- ♦ These experiences represent elements of a trip that would be highly appealing.
 - ♦ *“White water rafting and canoeing”*
 - ♦ *“White water rafting and walking. Seeing the bears”*
 - ♦ *“Horseback riding”*
 - ♦ *“Walking around and seeing the buildings in the cities”*
 - ♦ *“Walk around the lakes, seeing the bears”*
 - ♦ *“Helicopter ride over Niagara Falls and a round of golf”*
 - ♦ *“Looking at buildings, shopping, seeing French Canadian cities”*
 - ♦ *“The morning in Niagara Falls or on observation platform, then back to the city”*
- ♦ Once again this market needs exposure to nature (with reassurance of safety) plus infrastructure (could be a city, town or resort) as a significant component.

c) Existing Brochures

- ♦ Group participants were given for review a range of U.K. market package brochures featuring Canada.
- ♦ They first used them to help create their ideal trip (discussed earlier) and then were asked to what degree this existing “product” reflected their needs.
- ♦ Many of the comments about the brochure package presentations reflect prospective traveller perceptions that Canada may **only** be about nature, without a balance of infrastructure activities.
 - ♦ *“Not enough people”*
 - ♦ *“It needs some life – packed bars, restaurants, a Jazz Festival, something you don’t want to miss”*



3.4 Destination Imagery – Focus Group Feedback

- ♦ *“The emerging scene in the cities like Montreal”*
 - ♦ *“Pictures are stereotypical. I would want more people in the pictures”*
 - ♦ *“It doesn’t tell us what we would be doing in the wilderness”*
 - ♦ *“Will there be guides”? (to ensure we will be safe)*
 - ♦ *“They should sell the cities a bit more, like the restaurants and museums”*
 - ♦ *“No people enjoying themselves”*
 - ♦ *“Pictures are too small”*
 - ♦ *“Some of these photos could be anywhere”*
 - ♦ *“The hotel (Chateau Frontenac) is really nice”*
 - ♦ *“I still have the impression there may not be enough to see”*
 - ♦ *“I still can’t make a “movie” (as discussed earlier in the session)*
 - ♦ *“It is hard to really get a feel for Canada in these brochures”*
-
- ♦ Overall, these comments plead for an urban or infrastructure comfort, or at least people enjoying themselves to allay concerns about the Canadian experience being too singularly focused on nature.
 - ♦ However, a word of caution – Canada’s primary unique selling proposition remains its incredible nature and this must remain central to its marketing positioning and to the majority of vacation itineraries promoted.
 - ♦ By the same token, if urban scenes do not imply the uniqueness of Canada (e.g., by only depicting restaurants, bars and attractions that could be anywhere), Canada is unduly thrown into a competitive arena with thousands of other cities around the world that offer similar amenities.



3.4 Destination Imagery – Focus Group Feedback

- ♦ As one respondent said:
 - ♦ ***“Don’t just show us people at a restaurant (like any other city would), but focus in on the type of food on the plate that appears relatively unique to Canada (e.g., lobster)”***
- ♦ Another concern are the brochures that include the U.S. and Canada, the latter representing a minority of pages. U.K. residents do not like Canada shown in the same folder as America because they say it is very different. Also, it diminishes the perceived value or importance of Canada when only represented on a few of the pages.
- ♦ Finally, a comment on a visual showing older people reinforces the notion that there is no sense of urgency to visit Canada by “younger” individuals.
 - ♦ ***“When I see an older person on the train it means I can wait”***

This is very important learning and is a reminder of how critical it is to put forward the right visuals.

4. The Olympics 2010

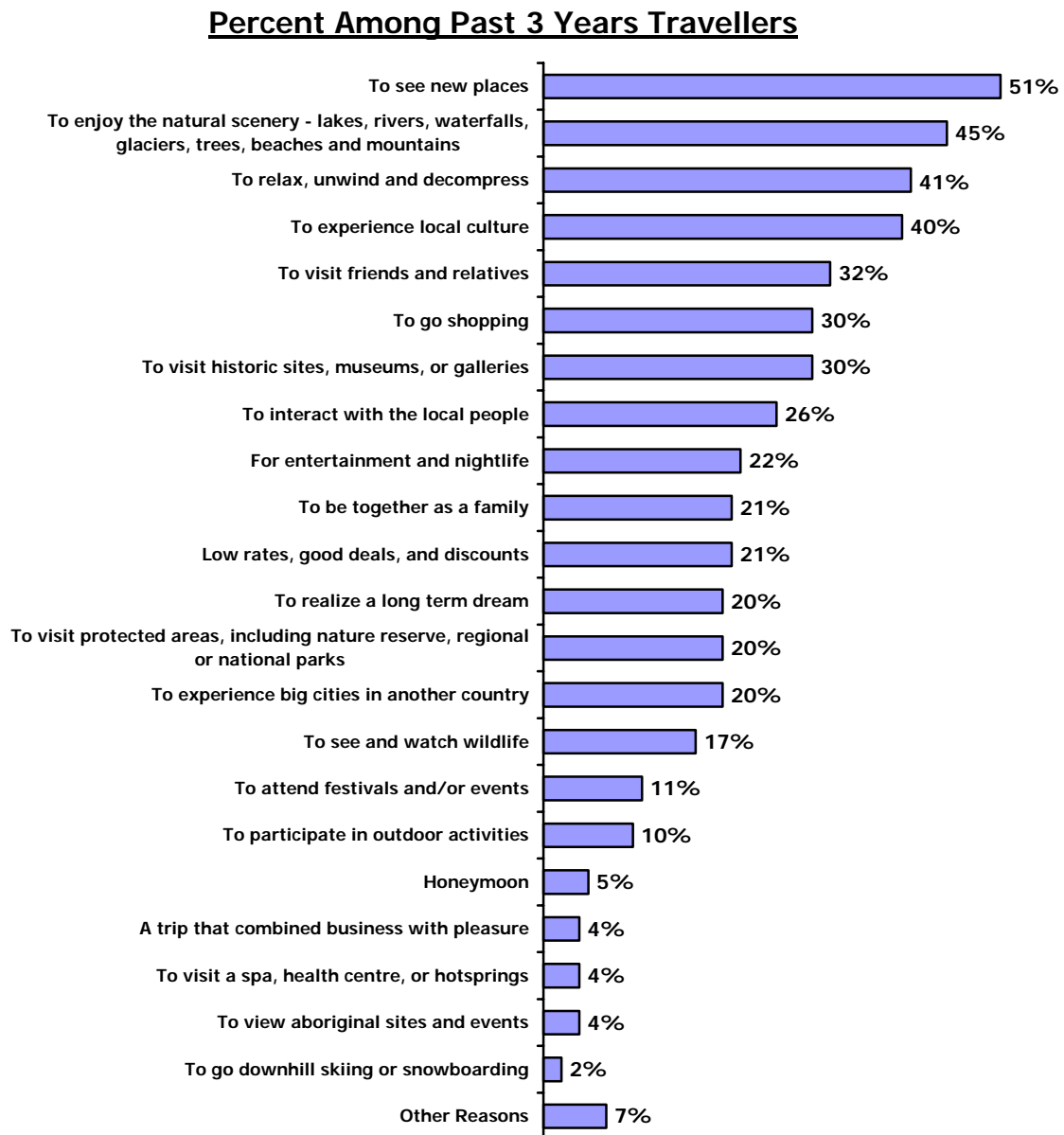
- ♦ Respondents in all three markets had the same opinion of the Olympics in 2010:
 - ♦ There is very little interest in visiting during the Olympics due to crowds, high prices, etc.
- ♦ However, they do provide an opportunity to showcase Canada through film footage, on television during the Games. However, a note of caution:
 - ♦ Footage should cover the summer season as well as the winter.
 - ♦ Great care must be made to re-enforce that Canada in many seasons is warm.
 - ♦ Footage should re-enforce the research learning – that the Canadian vacation experience provides a balanced and memorable vacation experience – beyond just nature but including first class amenities in natural surroundings, an interesting unique culture and activities for all ages.



3.5 Purpose of Trip - All

The destination drivers for British travelers reveal their need for a balanced vacation—to explore new places, enjoy nature, relax and unwind, experience local culture and socialize with friends.

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



Source: Quantitative Survey Q.9a¹

¹ Base=n=2,232

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



3.6 Purpose of Trip – All – By Destination

The appeal of Canada is clearly nature driven, but also visiting with friends/relatives, experiencing local culture, and interacting with the people.

What Canada is not about, where the U.S. excels, is shopping, nightlife and entertainment—reflecting the Brand Map discussed later. With aboriginal tourism, Canada is far behind leader Australia.

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

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>All Reasons for Taking Trip</u>				
To see new places	49	49	53	55
To enjoy the natural scenery – lake, rivers, waterfalls, glaciers, trees, beaches and mountains	50	62	37	68
To relax, unwind, and decompress	39	27	35	36
To experience local culture	59	34	29	39
To visit friends and relatives	33	65	31	48
To go shopping	29	20	46	27
To visit historic sites, museums, or galleries	35	27	26	34
To interact with the local people	34	28	21	32
For entertainment and nightlife	14	24	31	15
To be together as a family	17	24	24	24
Low rates, good deals, and discounts	23	15	24	14
To realize a long term dream	18	28	24	25
To visit protected areas, including nature reserve, regional or national parks	21	34	19	34
To experience big cities in another country	17	24	29	24
To see and watch wildlife	18	26	13	29
To attend festivals and/or events	14	14	11	11
To participate in outdoor activities	9	11	11	13
Honeymoon	7	4	4	4
A trip that combined business with pleasure	7	6	4	6
To visit a spa, health centre, or hot springs	8	6	3	5
To view aboriginal sites and events	6	23	2	6
To go downhill skiing or snowboarding	3	3	1	8
Other reasons	5	7	7	6

Source: Quantitative Survey Q.9a

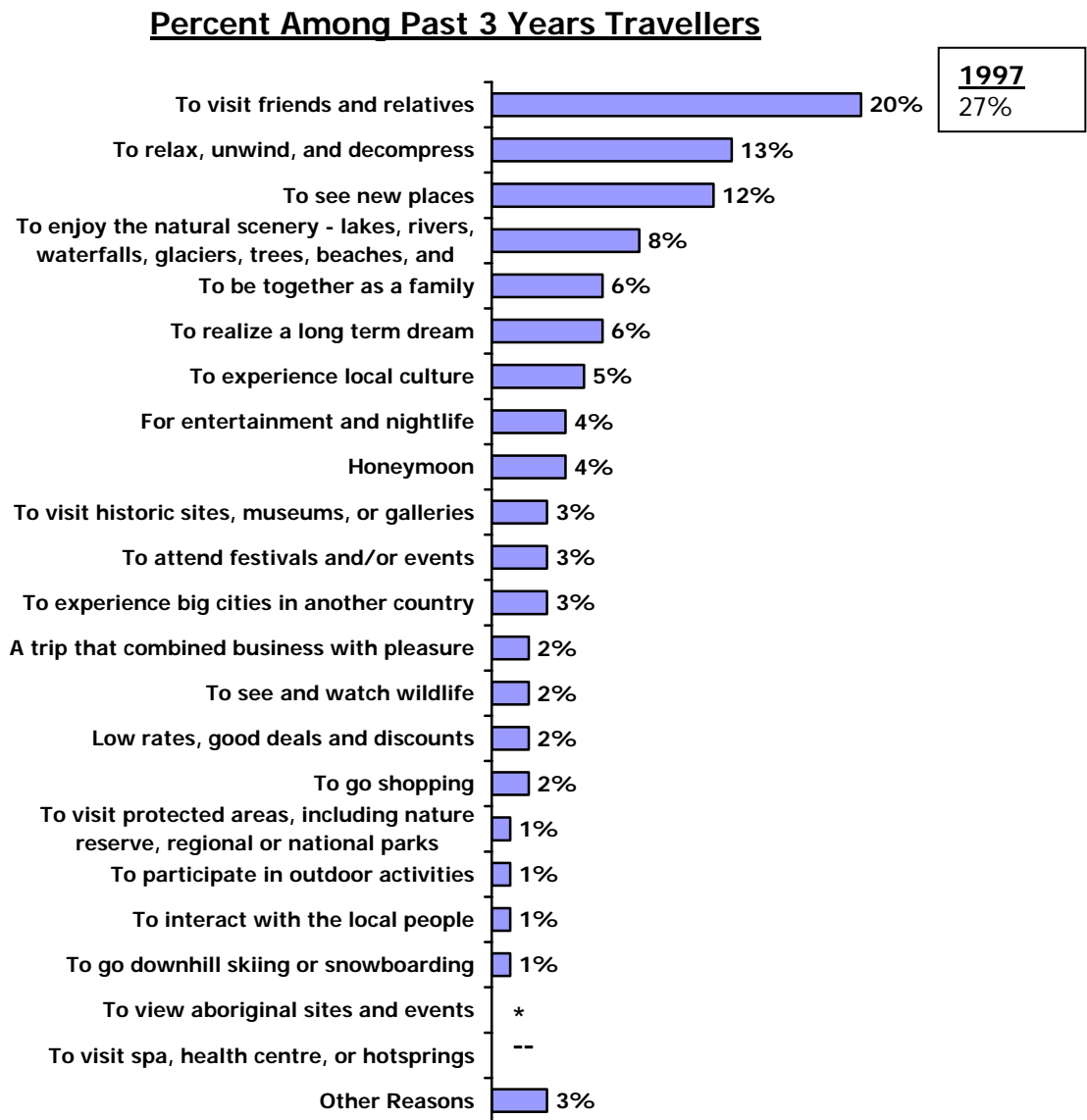
Q.9a What were your reasons for travelling to (Q.8a DESTINATION)



3.7 Purpose of Trip – Main

Nature experiences do not dominate UK travel motivations as they do for Germans and the French. Visiting friends/relatives, relaxing and unwinding and seeing new places all rank higher.

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



Source: Quantitative Survey Q.9b¹

¹Base n=2,232

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

*Less than 0.5%



3.8 Purpose of Trip – Main – By Destination

People oriented activities actually outrank nature as a motive to visit Canada for the British. Again, this reinforces the need for socializing in creating a balanced positioning concept for marketing Canada. However, VFR travel is well down from 1997.

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

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>Main Reason for Taking Trip</u>				
To visit friends and relatives	18	45	20	32
To relax, unwind, and decompress	12	2	9	4
To see new places	15	10	14	11
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	10	8	7	22
To be together as a family	5	6	7	4
To realize a long term dream	4	8	7	5
To experience local culture	12	2	2	1
For entertainment and nightlife	1	1	8	1
Honeymoon	3	2	3	3
To visit historic sites, museums, or galleries	5	1	2	1
To attend festivals and/or events	2	5	3	1
To experience big cities in another country	1	2	6	1
A trip that combined business with pleasure	4	1	1	3
To see and watch wildlife	1	2	*	1
Low rates, good deals, and discounts	1	-	2	1
To go shopping	2	-	3	1
To visit protected areas, including nature reserve, regional or national parks	1	3	1	1
To participate in outdoor activities	1	-	2	*
To interact with the local people	2	*	*	1
To go downhill skiing or snowboarding	-	1	1	4
To view aboriginal sites and events	-	*	-	*
To visit a spa, health centre, or hot springs	*	-	-	-
Other reasons	3	2	3	3

**Canada
1997**

47%

Source: Quantitative Survey Q.9b

*Less than 0.5%

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



3.9 Destination Activities – Culturally Oriented

Culturally dominated activities for UK travellers include visiting places of historical interest and seeing old architecture, but also meeting the people—visiting small towns, getting to know the local inhabitants and enjoying good food.

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



Source: Quantitative Survey Q.19a¹

¹ Base: n=2,232

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

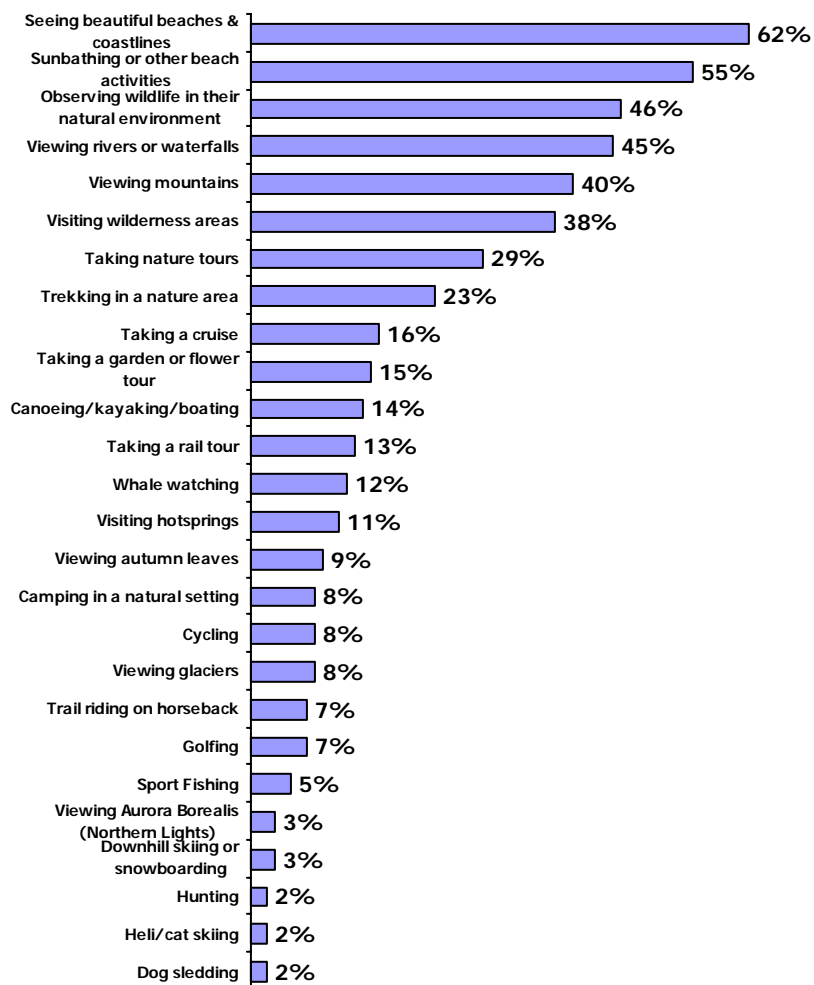


3.10 Destination Activities – Nature Oriented

On the nature side, passive activities far outweigh soft adventure—particularly seeing coastlines, sunbathing and viewing authentic nature.

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

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19a¹

¹Base: n=2,232

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



3.11 Destination Activities – Culturally Oriented – by Destination

With culturally oriented activities, the British want to see Canada's historical attractions, but they also desire getting close to the culture—small towns, the people, friends/relatives.

Relative to the U.S., Canada is far more often visited to see historic sites, including world heritage sites, and the Canadian way of life in both cities (e.g., city tours) and smaller towns. The U.S. is more about entertainment.

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

	Percent Among Travellers Visiting Each			
	Asia	Australia	U.S.	Canada
	(382) %	(165) %	(832) %	(884) %
<u>Culturally Oriented Activities Participated In</u>				
Visiting places of historical interest	74	69	56	67
Fine dining	60	67	61	58
Visiting small towns	68	78	53	67
Getting to know the local inhabitants	62	63	46	51
Seeing old architecture	58	47	42	48
Taking city tours	60	58	48	57
Visiting museums or art galleries	52	59	46	52
Attending theatres, clubs or shows	38	44	52	36
Visiting friends or relatives	46	75	37	54
Seeing modern architecture	41	57	41	45
Visiting world heritage sites	42	43	30	41
Staying at a luxury resort	38	28	25	16
Attending festivals or fairs	33	35	28	26
Aboriginal cultural experiences, celebrations, and attractions	28	56	10	19
Visiting a spa	28	25	10	14
Visiting casinos	16	28	23	13
Taking a wine/cultural tour	17	39	9	13
Attending professional sports events	11	25	14	17
Attending rodeos	10	8	5	5

Source: Quantitative Survey Q.19a



3.12 Destination Activities – Nature Oriented – By Destination

Beaches and sunbathing dominate Australia outdoor activities, while in Canada rivers, waterfalls and mountains as well as seeing wildlife in nature are the main attractions on the nature side. Only a minority aspires to soft adventure.

A trip to the U.S. is rarely nature focussed, clearly providing a clear point of difference for Canada.

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

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>Nature Oriented Activities Participated In</u>				
Seeing beautiful beaches and coastlines	66	85	48	40
Sunbathing or other beach activities	58	79	41	18
Observing wildlife in their natural environment	48	71	38	55
Viewing rivers or waterfalls	51	65	37	77
Viewing mountains	45	54	33	61
Visiting wilderness areas	38	62	32	49
Taking nature tours	39	46	18	35
Trekking in a nature area	29	35	17	30
Taking a cruise	23	22	13	16
Taking a garden or flower tour	27	21	10	19
Canoeing/kayaking/boating	20	19	10	15
Taking a rail tour	23	28	11	19
Whale watching	15	22	11	19
Visiting hot springs	17	26	8	15
Viewing autumn leaves	11	8	11	22
Camping in a natural setting	14	19	4	10
Cycling	13	11	6	10
Viewing glaciers	10	12	6	25
Trail riding on horseback	10	8	5	8
Golfing	10	10	9	5
Sport fishing	8	13	4	7
Viewing Aurora Borealis (Northern Lights)	8	11	2	7
Downhill skiing or snowboarding	6	5	2	9
Hunting	6	4	2	3
Heli/cat skiing	6	6	1	3
Dog sledding	4	3	1	5

Source: Quantitative Survey

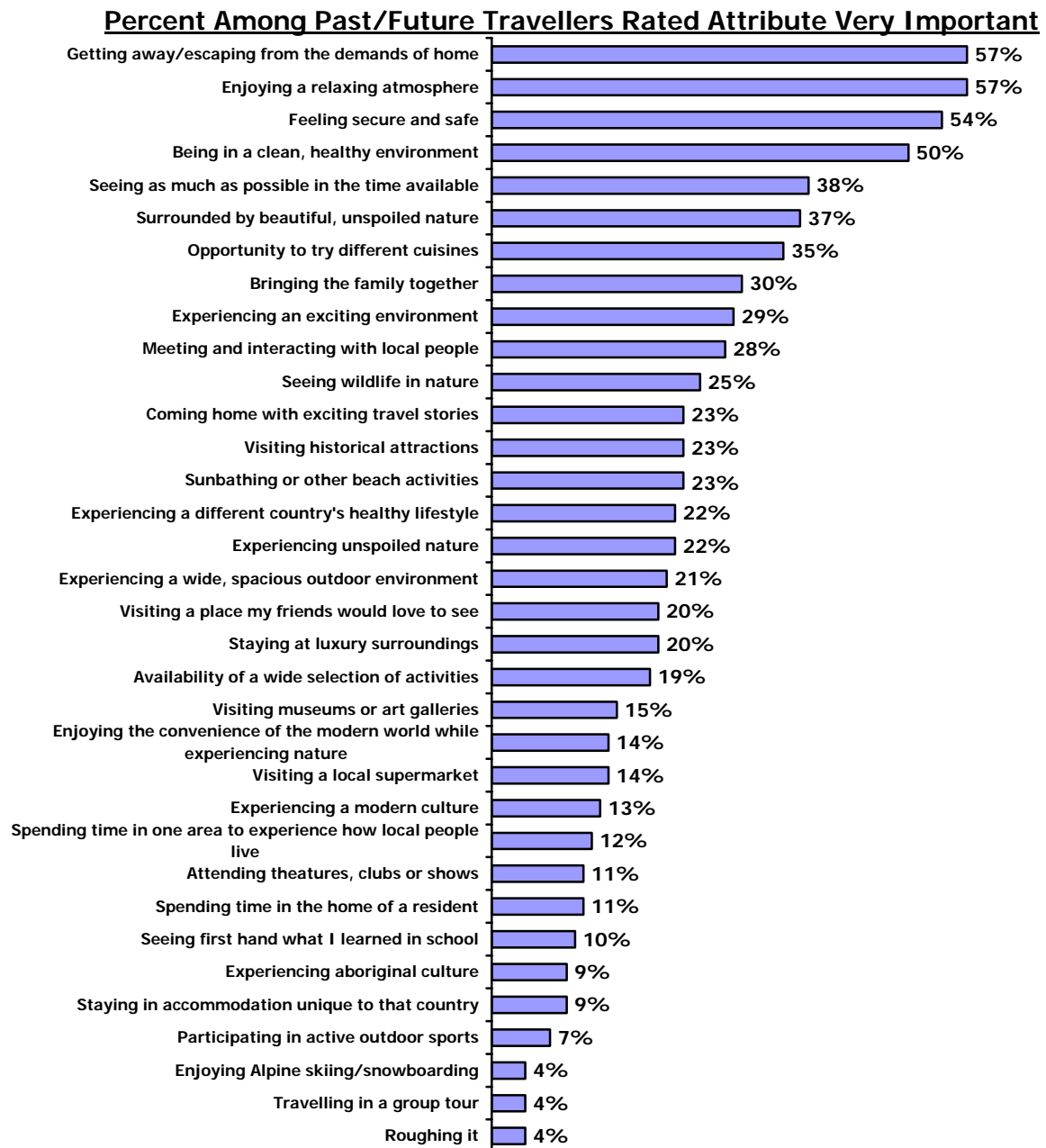
Q.19a Which, if any, of the following activities did you participate in while on that trip to (DESTINATION IN Q. 8a)



3.13 Importance of Attributes in Destination Selection

This chart ranks 34 destination selection attributes on importance.

EXHIBIT SECTION 3-12: IMPORTANCE OF ATTRIBUTE IN DESTINATION SELECTION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.20¹

¹ Base=n=2,697

Q.20 Please imagine that you are taking an overseas pleasure trip **beyond the European Union countries, North Africa and the Mediterranean** for 3 nights or longer with at least one night in paid accommodation. For each statement on this page check one box to show how important that reason is to you when considering such a trip.



3.14 Destination Rating

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

EXHIBIT SECTION 3-13: CANADA'S STRENGTHS AND WEAKNESSES VS. COMPETITORS

	Vs. U.S.	Vs. Australia	Vs. South East Asia
Canada's Strengths	<ul style="list-style-type: none"> • Surrounded by beautiful, unspoiled nature • Experiencing unspoiled nature • Being in a clean, healthy environment • Seeing wildlife in nature • Attracts more historical sightseeing and experiencing communities 	<ul style="list-style-type: none"> • Enjoying Alpine (downhill) skiing or snowboarding • Rivers, waterfalls, autumn leaves, and glaciers 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Participating in active outdoor sports • Experiencing a wide, spacious outdoor environment • Feeling secure and safe • Enjoying the convenience of the modern world while experiencing nature • Surrounded by beautiful, unspoiled nature • Seeing wildlife in nature
Canada's Weaknesses	<ul style="list-style-type: none"> • Attending theatre, clubs, shows • Sunbathing/beach activities • Experiencing a modern culture • Staying at luxury surroundings • Visiting museums or art galleries 	<ul style="list-style-type: none"> • Experiencing aboriginal culture • Sunbathing or other beach activities • Roughing it • Wine/cultural tours • Observing wildlife • Visiting hot springs 	<ul style="list-style-type: none"> • Opportunity to try different cuisines • Sunbathing or other beach activities • Experiencing local life in one area
Summary	<ul style="list-style-type: none"> • Canada is way ahead in terms of a natural experience • Also, Canadian history and way of life is more appealing • But the U.S. provides more entertainment and luxury city stays 	<ul style="list-style-type: none"> • Except on a very few dimensions Canada's image is very similar to Australia's. Canada is ahead on skiing, Australia on aboriginal attractions, beach and roughing it 	<ul style="list-style-type: none"> • Canada is far ahead in experiencing a natural environment. • S.E. Asia offers sun and exotic cuisine.



3.14 Destination Rating

EXHIBIT SECTION 3-14: DESTINATION RATING

	Among Those Who Claimed Each Attribute Very/Somewhat Important When Considering a Trip			
	S.E. Asia	Australia	U.S.	Canada
	%	%	%	%
<u>Attribute Applies Extremely Well to Each Destination*</u>				
Getting away/escaping from the demands of home	43	60	53	53
Enjoying a relaxing atmosphere	31	56	36	48
Feeling secure and safe	25	55	48	57
Being in a clean, healthy environment	15	56	48	63
Seeing as much as possible in the time available	40	46	57	43
Surrounded by beautiful, unspoiled nature	36	61	33	61
Opportunity to try different cuisines	68	41	39	34
Bringing the family together	23	39	43	34
Experiencing an exciting environment	44	50	50	43
Meeting and interacting with local people	55	55	49	48
Seeing wildlife in nature	36	62	34	55
Coming home with exciting travel stories	54	57	54	49
Visiting historical attractions	50	46	51	44
Sunbathing or other beach activities	39	61	45	18
Experiencing a different country's healthy lifestyle	33	51	29	46
Experiencing unspoiled nature	38	62	33	59
Experiencing a wide, spacious outdoor environment	25	65	43	59
Visiting a place my friends would love to see	42	51	46	43
Staying at luxury surroundings	35	45	61	41
Availability of a wide selection of activities	30	54	57	47
Visiting museums or art galleries	29	40	59	43
Enjoying the convenience of the modern world while experiencing nature	26	53	40	52
Visiting a local supermarket	40	46	57	46
Experiencing a modern culture	22	38	55	36
Spending time in one area to experience how local people live	51	41	30	33
Attending theatres, clubs or shows	20	35	63	35
Spending time in the home of a resident	26	36	34	29
Seeing first hand what I learned in school	31	39	41	32
Experiencing aboriginal culture	23	65	15	16
Staying in accommodation unique to that country (e.g., guest ranch, lodge, etc.)	36	40	44	47
Participating in active outdoor sports	20	49	47	42
Enjoying Alpine (downhill) skiing or snowboarding	8	18	41	53
Travelling in a group tour	32	34	35	29
Roughing it	34	38	21	21

Source: Quantitative Survey Q.21

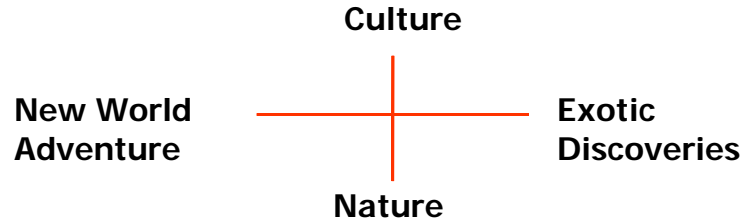
Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, experiences or anything else that you have seen,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

* In order of importance when deciding an overseas pleasure trip (exhibit 3-12)



3.15 Perceptual Brand Map

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



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

The map should be interpreted in a “big picture” sense — which groups of attributes are most related to which areas of the map; in turn, which countries are most associated with these areas.

Part of the map interpretation is to see if there is any continuum as one moves from left to right or top to bottom. It is a subjective interpretation of the chart pattern, New World Adventure is chosen because the attributes associated with North America are on the left side of the chart, while the attributes that are more SE Asia and Southern Hemisphere related tend to fall on the right hand side. The attributes with a cultural component tend to fall towards the top and those with a nature component tend to fall towards the bottom, hence the interpretation of the vertical axis.

Note that the map is created based on the interaction of all the attributes with the four countries; the interpretation of the axes emerges from the map after it has been created.

Brand Positioning

Australia

Alone in the Southeast Quadrant, Australia aligns with relaxation, healthy lifestyle, with an element of exoticism from aboriginal culture.

U.S.A

This country dominates the Northwest sector and is strongly associated with modern, urban culture, luxury and a wide variety of activities.



3.15 Perceptual Brand Map

S.E. Asia

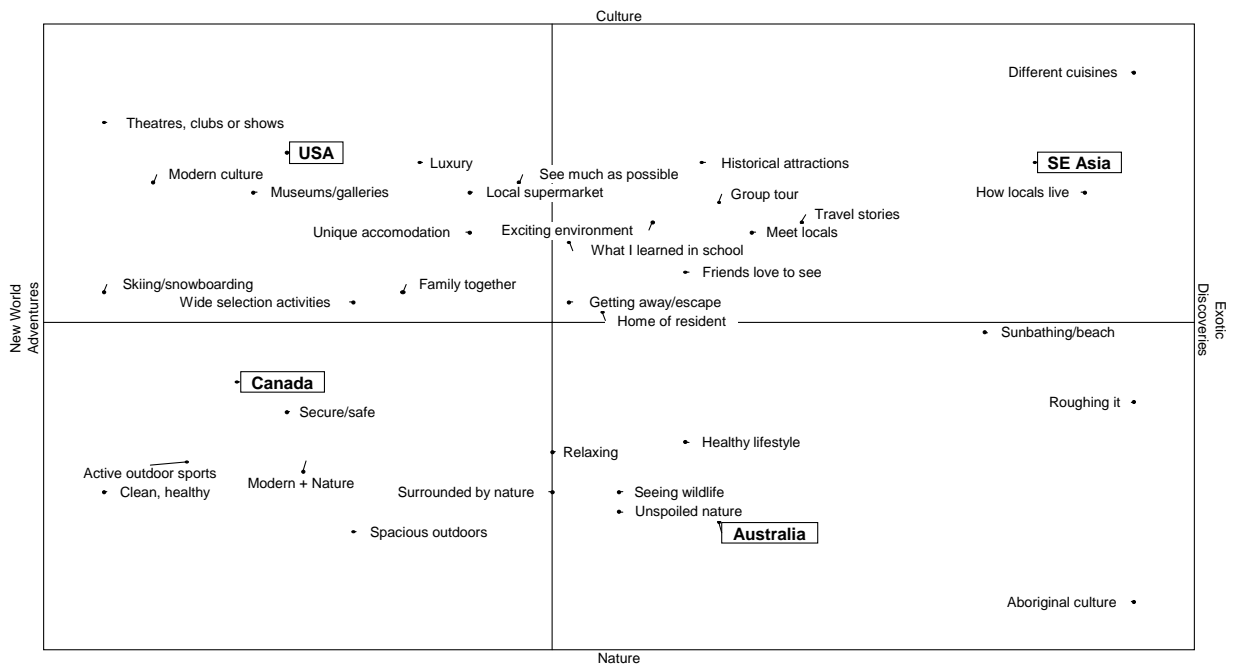
In the Northeast quadrant, SE Asia is associated with sun, beaches and different cuisines.

Canada

Clearly entrenched in the Southwest sector, Canada aligns with the outdoors—active, spacious, clean, as well as a very safe environment.

Its positioning well away from cultural activities and an exciting environment reinforces the weaknesses of the country's image discussed earlier. The strength of its nature is critical because of its importance to UK travellers, but the product concept is not balanced appropriately.

EXHIBIT SECTION 3-15: BRAND ATTRIBUTE MAP



Source: Quantitative survey Q.21

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



3.16 U.K. -- Product Benefit Laddering

To further probe traveller motivation, Insignia used their Inner Consciousness Laddering Model to draw out the “higher order” benefits that travellers are seeking in a Canadian vacation.

The hierarchy process:

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

For the British, the Canadian vacation experience at the product/activity level is grounded in nature involvement, grand nature observation, and city life.

At the Benefits level, these nature and personal experiences lead to:

- Grounding
- Rejuvenation of the spirit
- Personal connection with nature
- Feeling the balance between the civility of Canadian cities so close and in harmony with authentic, untouched nature

At the highest order, the Value received is:

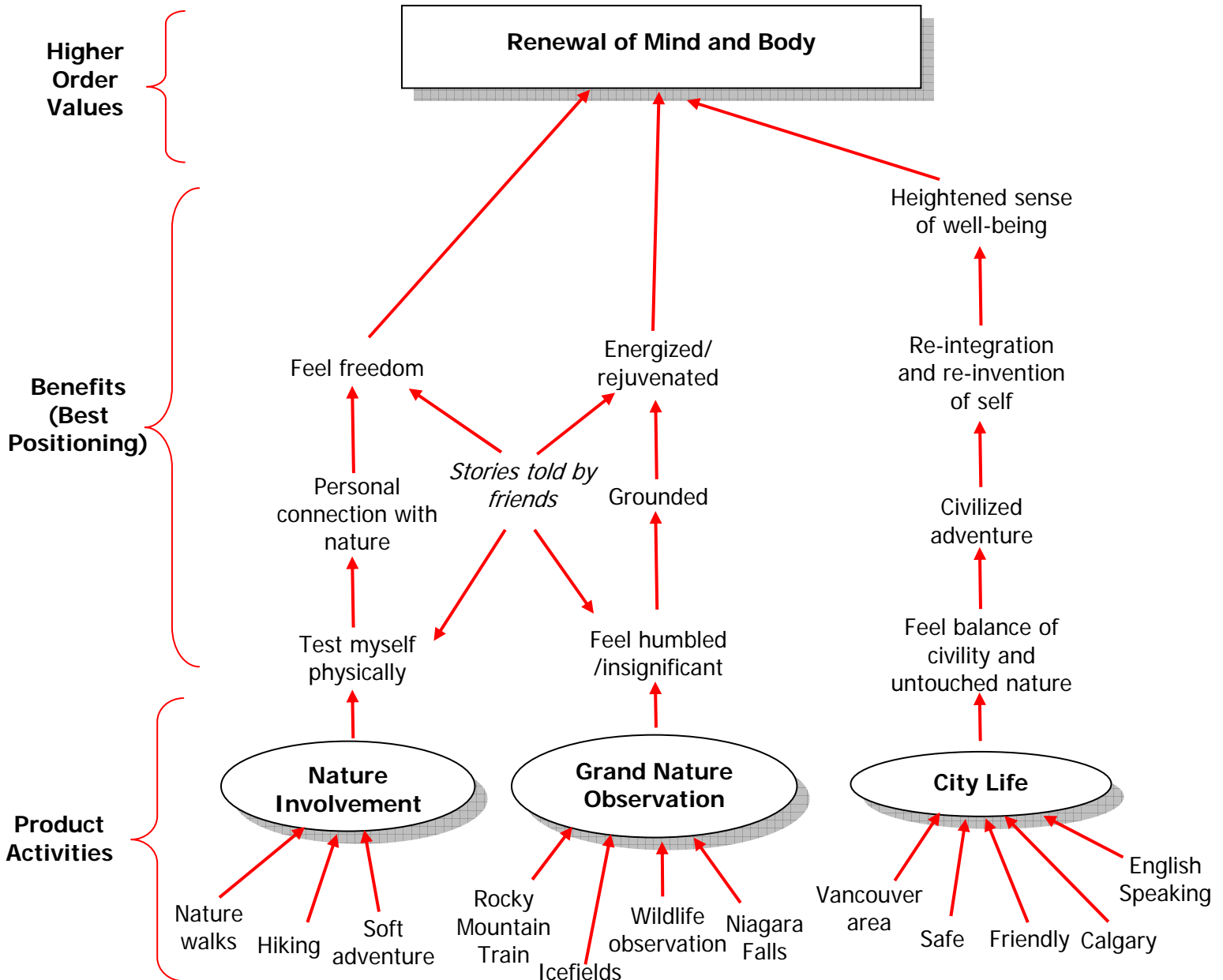
- Renewal of body and mind

Implications

The best way to position Canada’s products (city, cultural, and nature) is to focus on the physical and emotional rewards that they provide.



3.16 U.K. -- Product Benefit Laddering



Section 4: Destination Trip Profile

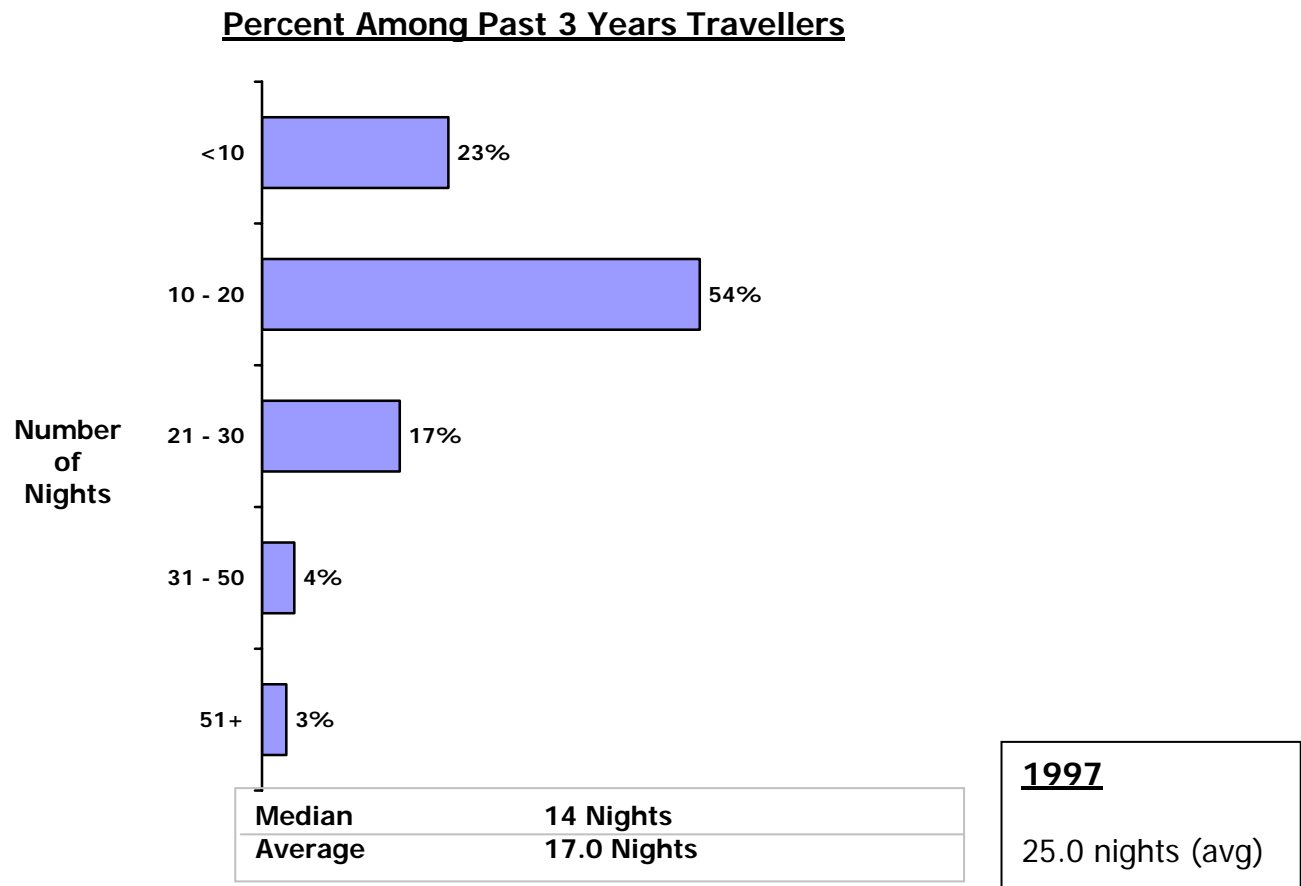


4.1 Duration

The British typically travel for 2 weeks when going abroad. The average long-haul trip lasts 17 nights.

In 1997, the average duration was 25 nights away, providing clear evidence that travellers are taking shorter trips abroad.

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



Source: Quantitative Survey Q.10a¹

¹ Base: n=2,232

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



4.2 Duration – By Destination

Trips to the U.S. or Canada are more likely to last 2 weeks, while a journey to Australia last much longer. This is a reminder that a trip to Canada is far less onerous from a time perspective than one to Australia.

The duration of a Canadian trip is only slightly shorter (18.1 nights away) than in 1997 (21.4 nights)

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

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>Number of Nights</u>				
<10	19	8	23	21
10 – 20	47	20	57	54
21 – 30	24	44	16	18
31 – 50	6	15	3	4
51+	5	14	2	3
Median of nights	15	24	14	14
Average # of nights	20.4	35.2	16.3	18.1

**Canada
1997**

21.4 (avg)

Source: Quantitative Survey Q.10a



Nights Spent in Canada	
	#
Median	12
Average	12.9

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

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



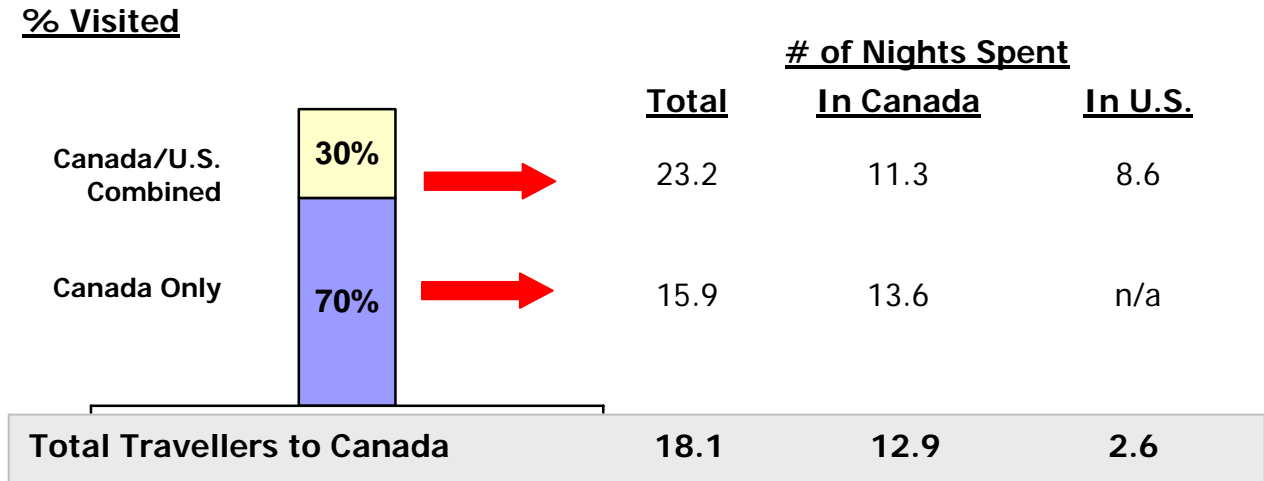
4.3 Multi-Country Visits

Three in ten British travellers are combining a trip to Canada with a stay in the U.S..

And, when they do, they tend to split their time between the 2 countries—11 nights in Canada, 9 in the U.S..

EXHIBIT SECTION 4-3: INCIDENCE/DURATION OF VISIT IN CANADA/U.S.

Among Past 3 Years Travellers to Canada



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

¹ Base: n=884

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

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

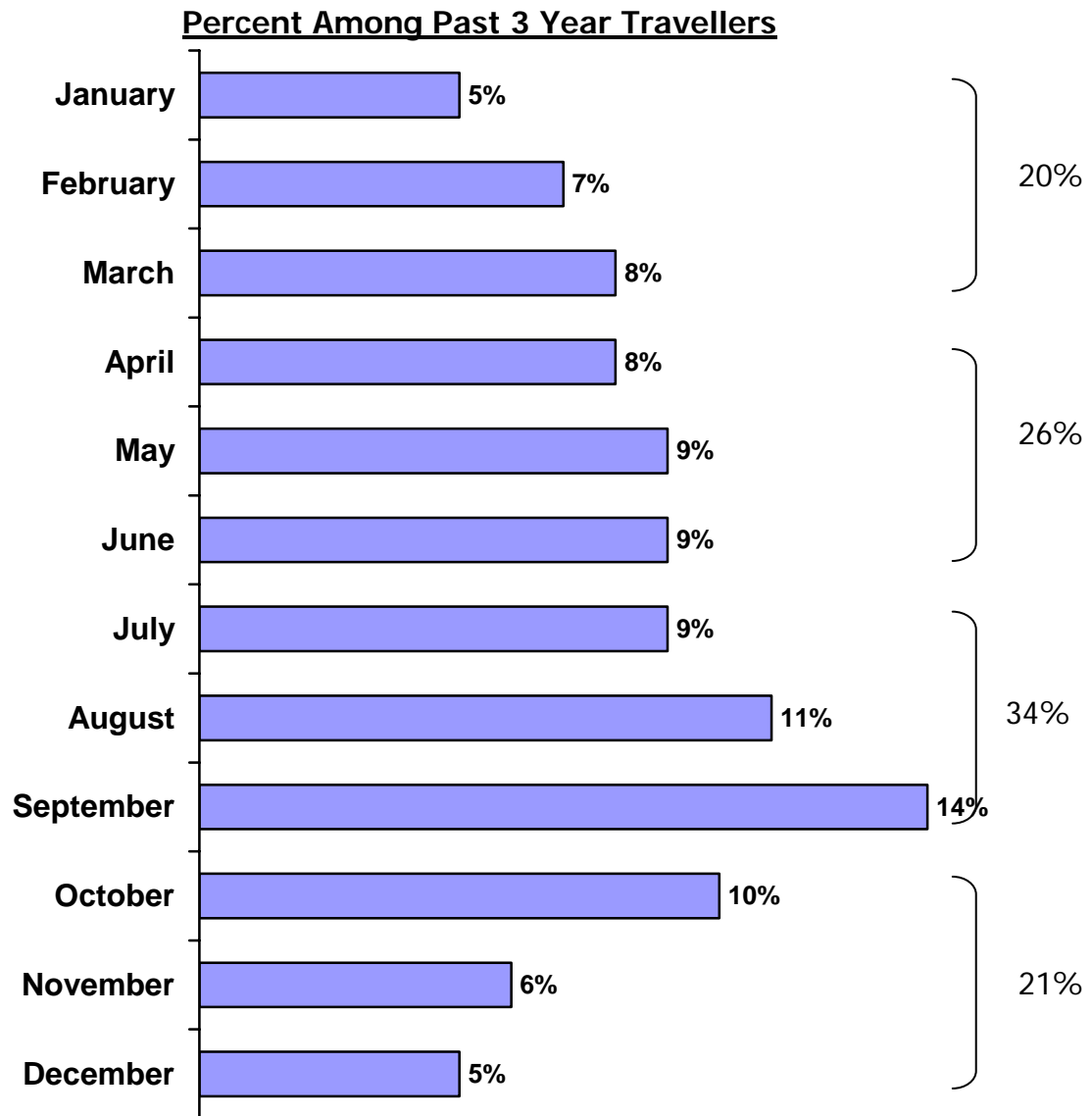
10.c IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in the United States on that trip, if any?



4.4 Time of Travel

The travel season is quite broad for the British. They travel actively from February to October.

EXHIBIT SECTION 4-4: MONTH OF TRAVEL — BY ALL DESTINATIONS



Source: Quantitative Survey Q.11¹

¹ Base=n=2,232

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



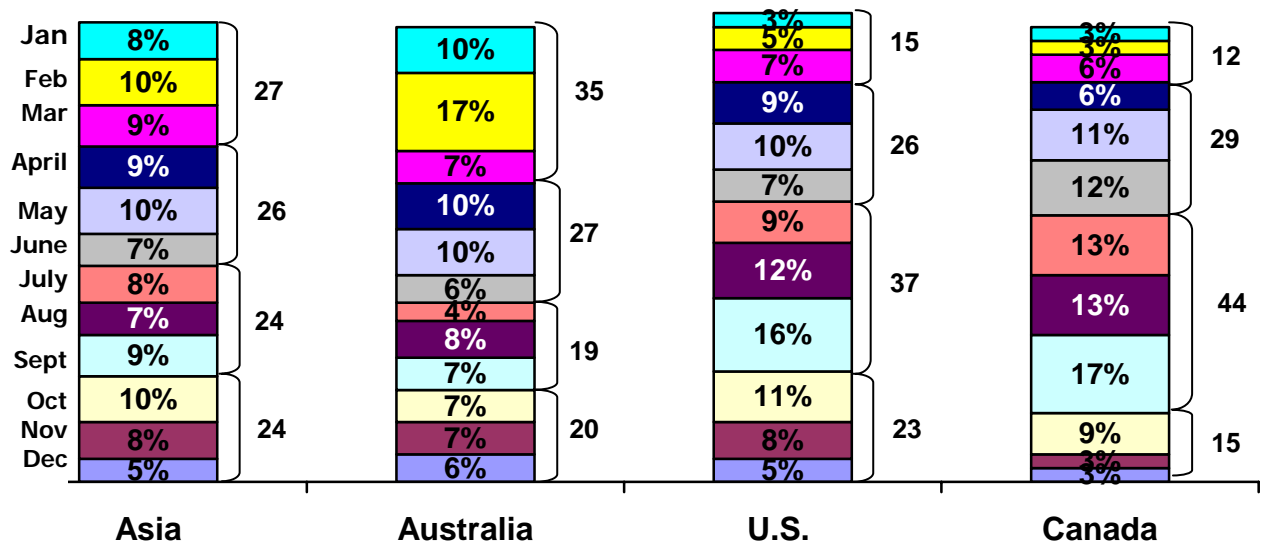
4.5 Time of Travel – By Destination

May to September is the preferred time of travel to Canada. This is a little narrower than the U.S. trip pattern (where better weather can prevail longer)—April to October.

Asia destined trips are year round, Australia from January to May primarily.

EXHIBIT SECTION 4-5: MONTH OF TRAVEL — BY DESTINATION

Percent Among Travellers Visiting Each Destination



Source: Quantitative Survey Q.11

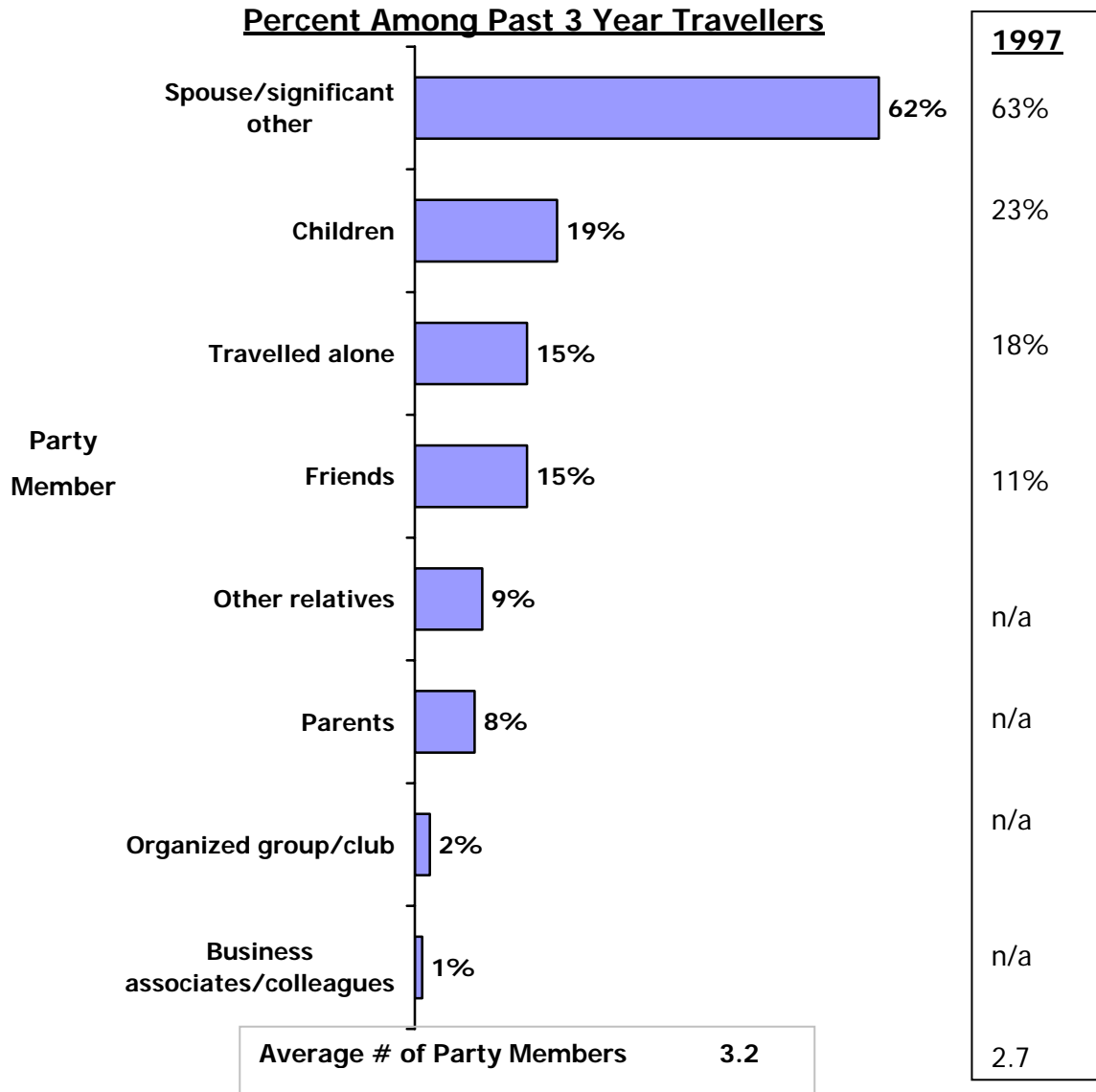
Q.11 And when did you take that trip to **(DESTINATION IN Q.8a)?** Please tell me the year and month you started that trip?



4.6 Party Size and Composition

Only 19% of British long-haul travellers take children along. Most travel as couples (62%), similar to 1997 (63%)

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



Source: Quantitative Survey Q.12, 13a¹

¹ Base=n=2,232

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

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



4.7 Party Size and Composition – by Destination

Canada is preferred by couples. Australia often attracts solo travellers (1 in 4), the U.S.--families (1 in 4).

EXHIBIT SECTION 4-7: PARTY SIZE AND COMPOSITION – BY DESTINATION

	Percent Among Travellers Visiting Each				Canada 1997
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %	
<u>Party Member</u>					
Spouse/significant other	56	54	63	62	56%
Children	12	14	24	17	20%
Travelled alone	19	27	12	16	28%
Friends	15	13	16	13	10%
Other relatives	8	8	11	9	n/a
Parents	8	4	9	7	n/a
Organized group/club	3	4	1	2	n/a
Business associates/colleagues	2	*	1	1	n/a
Average # of party members	3.2	2.5	3.1	3.1	2.3

Source: Quantitative Survey Q. 12, 13a

* Less than 0.5%

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

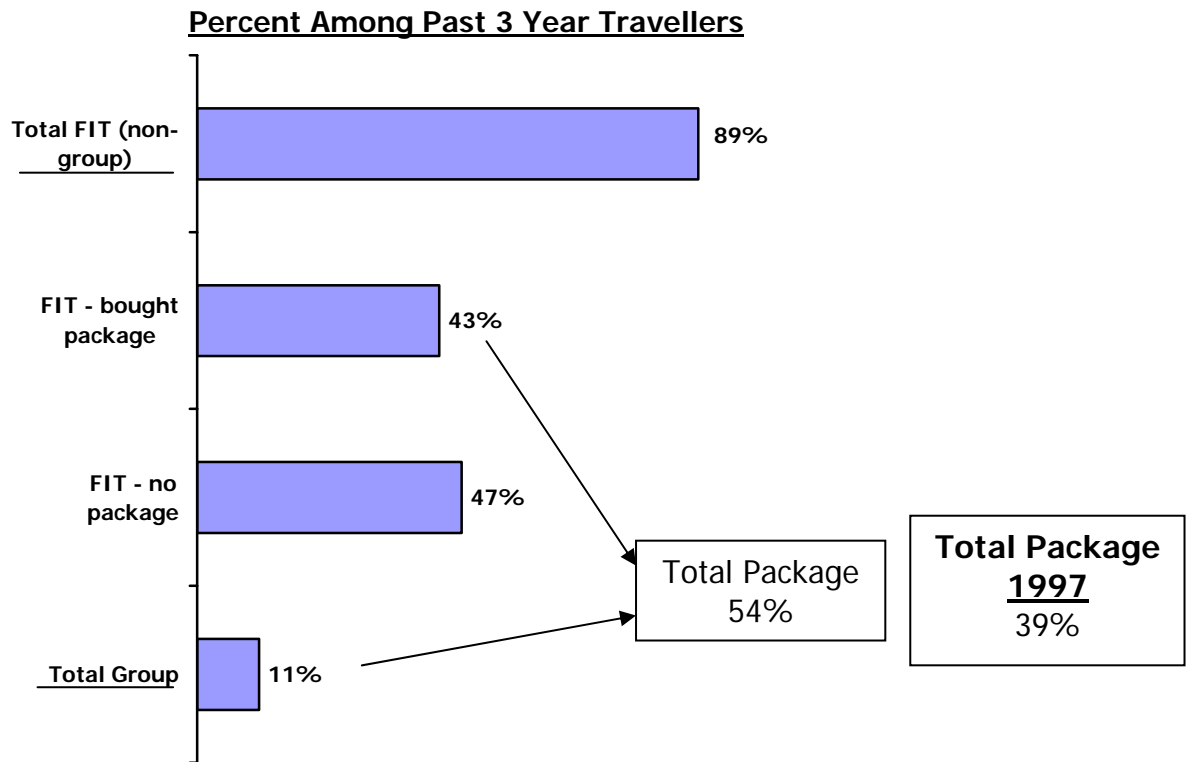
Q.13a Including yourself, how many people were there in your immediate travel party?



4.8 Travelled as FIT vs. Group

FIT dominates British long-haul travel (89%). However, half do buy packages (43% an FIT package, 11% a group). This is higher than in 1997 — when 39% used packages.

EXHIBIT SECTION 4-8: FIT VS. GROUP TRAVEL — BY ALL DESTINATIONS



Source: Quantitative Survey Q.16,17a¹

¹ Base: n=2,232

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

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



4.9 Travelled as FIT vs. Group – By Destination

Packages are not very popular to Canada. Only 37% of trips to Canada are on a package. Nine in ten to Canada are FIT—mostly no package (62%).

FIT packages are far more common to the U.S. and Asia.

In 1997, only 23% used a package to Canada, also lower than now (37%)

EXHIBIT SECTION 4-9: FIT VS. GROUP – BY DESTINATION

	Percent Among Travellers Visiting Each			
	<u>Asia</u>	<u>Australia</u>	<u>U.S.</u>	<u>Canada</u>
	(382)	(165)	(832)	(884)
	%	%	%	%
<u>Travelled as:</u>				
<u>Total FIT (non-group)</u>	<u>86</u>	<u>92</u>	<u>94</u>	<u>87</u>
Total FIT – bought package	45	33	40	24
Total FIT – no package	41	58	54	62
<u>Total Group</u>	<u>14</u>	<u>9</u>	<u>6</u>	<u>13</u>

Source: Quantitative Survey Q.16,17a

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

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

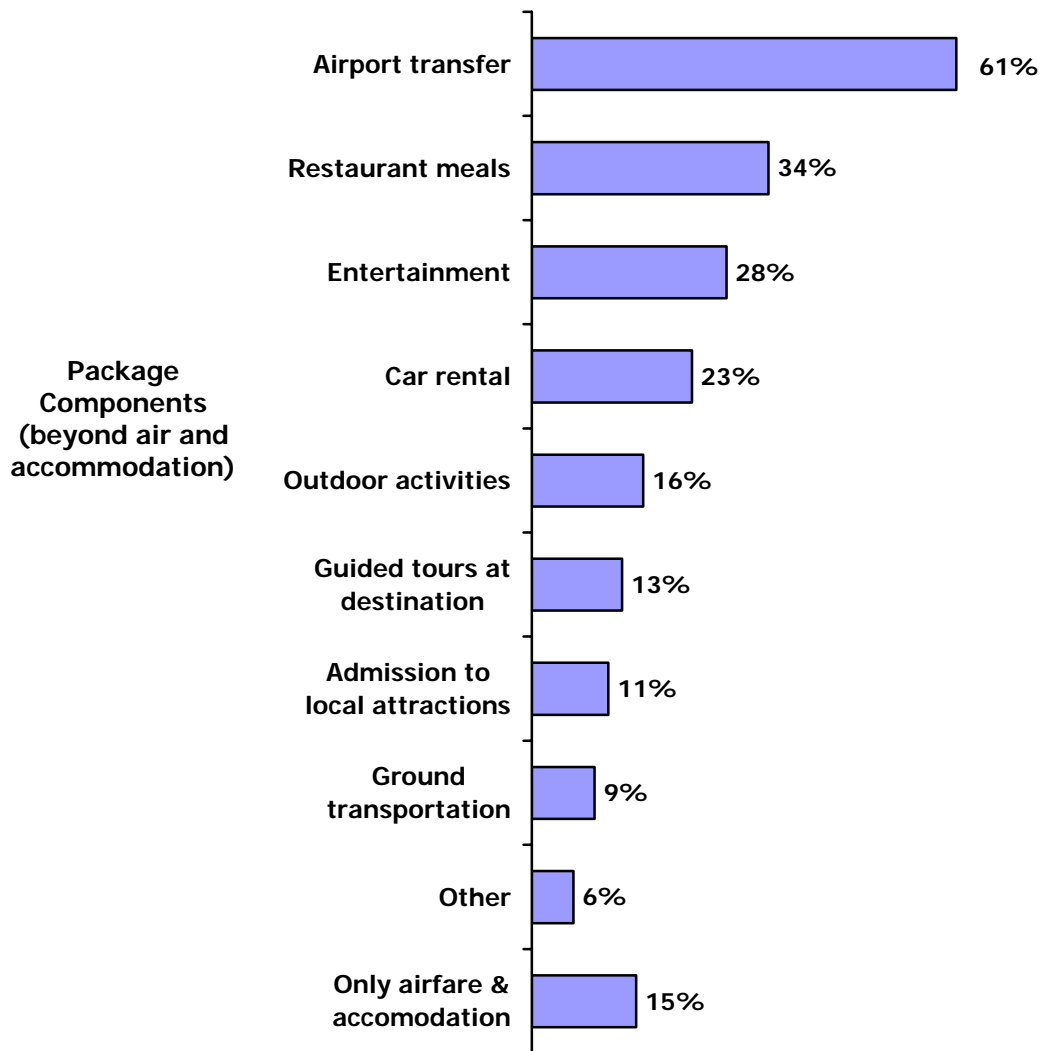


4.10 FIT Package Components

The 43% who bought an FIT package (air and accommodation) on their most recent long-haul trip usually include airport transfers, but inclusions thin out after that.

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

Percent Among Those Who Travelled on FIT Package



Source: Quantitative Survey Q.17b¹

¹ Base: n=816

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



4.11 FIT Package Components – By Destination

Canadian packages are typical in that they often include airport transfers (52%), sometimes car rental (32%) but little else on a consistent basis.

EXHIBIT SECTION 4-1 1: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION
– BY DESTINATION

	Percent Among Those Who Travelled on FIT Package			
	<u>Asia</u> (165) %	<u>Australia</u> (58) * %	<u>U.S.</u> (290) %	<u>Canada</u> (205) %
Package Components (beyond air/accommodation)				
Airport transfers	61	56	44	52
Restaurant meals	26	27	16	21
Entertainment	23	14	14	17
Car rental	22	30	41	32
Outdoor activities	13	9	7	12
Guided tours at destination	22	31	8	18
Admission to local attraction	12	14	16	12
Ground transportation between overnight destinations	16	15	5	21
Other	9	8	4	3
Only airfare and accommodation	11	15	20	21

Source: Quantitative Survey Q.17b¹

* Caution small base size

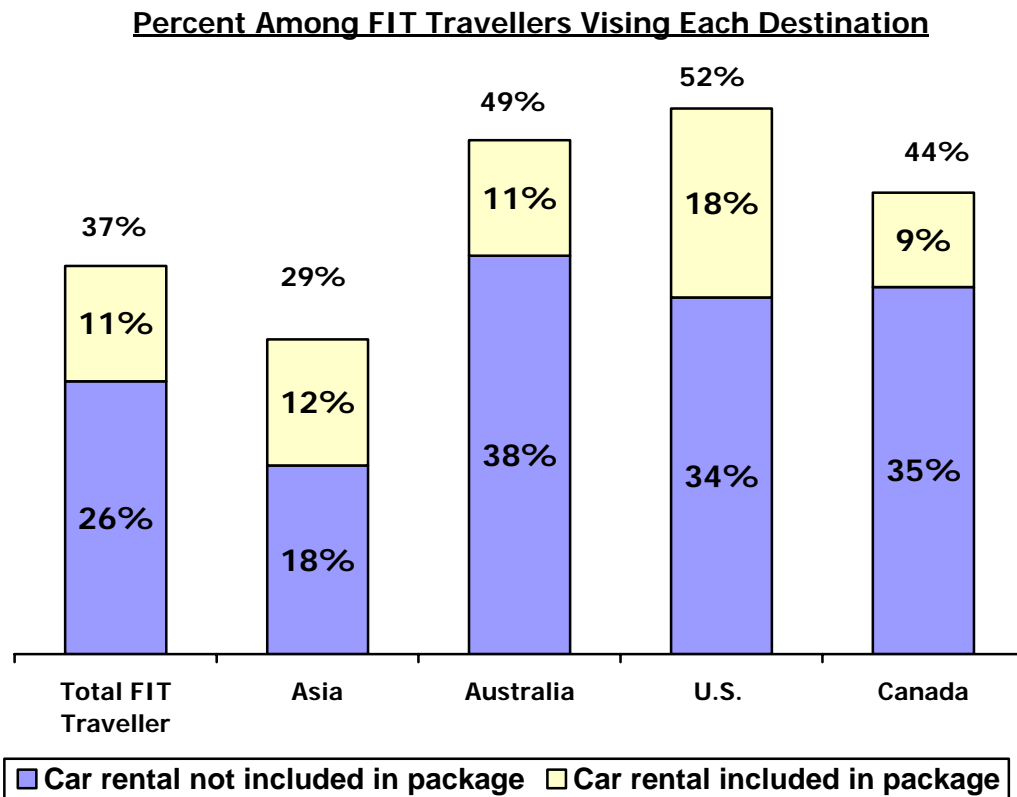
¹ 17b) What else was included in the package, if any?



4.12 FIT Car Rental

Renting a car is quite common in Canada (44%) and the U.S. (52%). Note that most rentals in Canada are not part of a package. Clearly many are picking up cars on arrival and proceeding on their own.

EXHIBIT SECTION 4-1 2: FIT CAR RENTAL



Source: Quantitative Survey Q.17b,c¹

¹Base: n=1,962

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

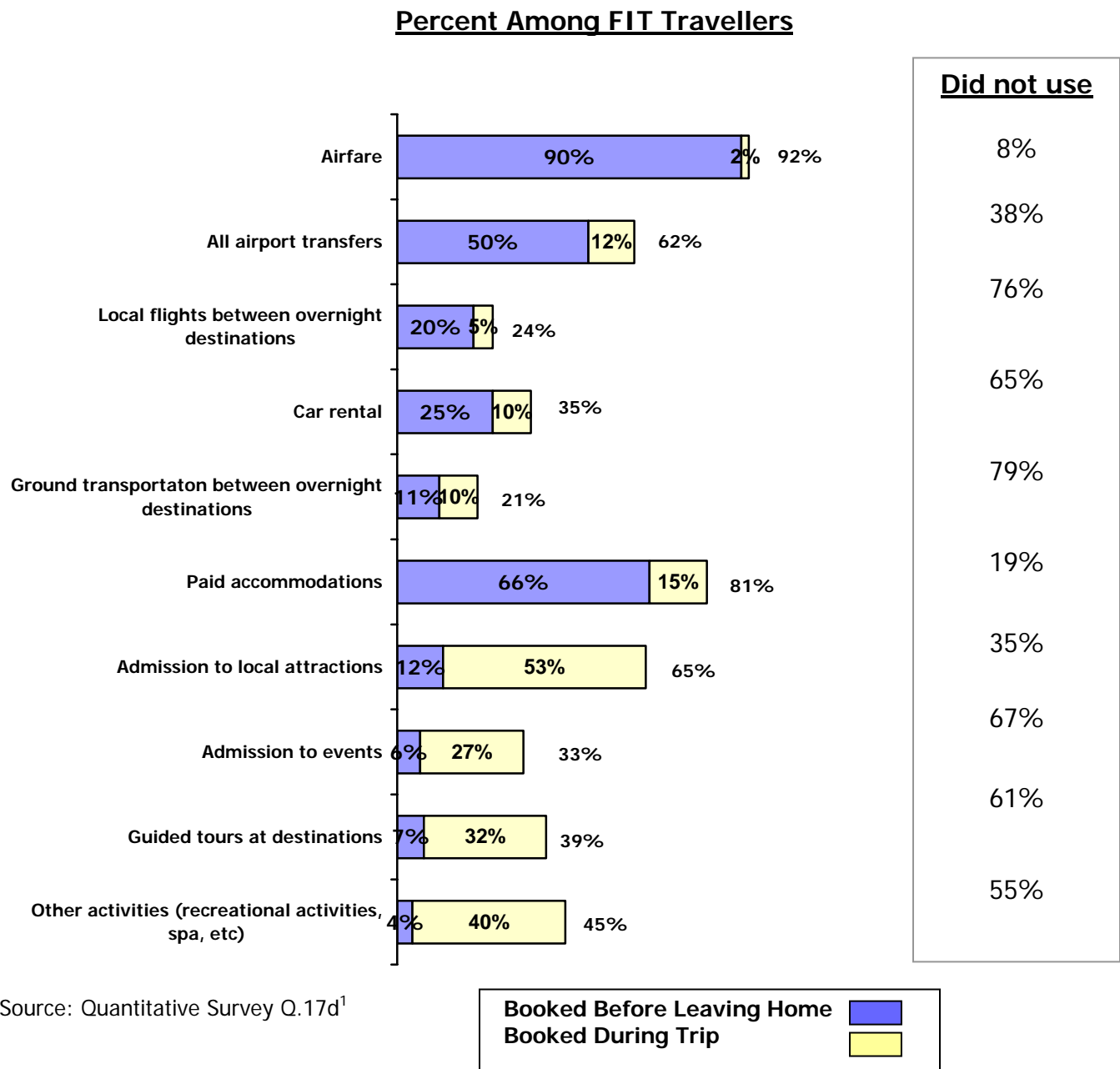
17c) (IF NO AT Q.17A OR IF CAR RENTAL NOT CHECKED IN Q.17B, ASK Q.17C. OTHERS SKIP TO Q.18) Did you rent a car on that trip?



4.13 FIT Trip Components Booked Before Departure vs. During Trip

Long-haul airfares, transfers, accommodation, local flights and often car rentals tend to be pre paid. Otherwise, trip components are usually purchased locally.

EXHIBIT SECTION 4-13: FIT TRIP COMPONENTS BOOKED BEFORE DEPARTURE VS. DURING TRIP



¹ Base: n=1,962

Q.17d On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?



4.14 FIT Trip Components Booked Before Departure vs. During Trip – by Destination

The pattern for Canada is quite typical.

EXHIBIT SECTION 4-14: FIT TRIP COMPONENT BOOKED BEFORE DEPARTURE VS. DURING TRIP – BY DESTINATION

	Percent Among FIT Travellers Visiting Each Destination			
	<u>Asia</u> (322) %	<u>Australia</u> (150) %	<u>U.S.</u> (761) %	<u>Canada</u> (757) %
<u>Airfare</u>	<u>92</u>	<u>96</u>	<u>93</u>	<u>93</u>
Booked before leaving home	87	92	92	91
Booked during trip	5	4	1	2
Did not use	8	4	7	7
<u>Airport Transfers</u>	<u>69</u>	<u>69</u>	<u>56</u>	<u>50</u>
Booked before leaving home	52	53	41	34
Booked during trip	17	16	15	16
Did not use	31	31	44	50
<u>Local Flights Between Overnight Destinations</u>	<u>40</u>	<u>59</u>	<u>21</u>	<u>24</u>
Booked before leaving home	30	44	18	19
Booked during trip	10	15	3	5
Did not use	60	41	79	76
<u>Car Rental</u>	<u>28</u>	<u>44</u>	<u>48</u>	<u>41</u>
Booked before leaving home	14	22	42	31
Booked during trip	14	22	7	10
Did not use	73	55	52	59
<u>Ground Transportation Between Overnight Destinations</u>	<u>35</u>	<u>38</u>	<u>15</u>	<u>24</u>
Booked before leaving home	14	22	8	12
Booked during trip	20	16	7	12
Did not use	65	62	85	76
<u>Paid Accommodation</u>	<u>81</u>	<u>82</u>	<u>85</u>	<u>74</u>
Booked before leaving home	58	52	72	55
Booked during trip	23	30	13	20
Did not use	19	18	15	26



4.14 FIT Trip Components Booked Before Departure vs. During Trip – by Destination

	Percent Among FIT Travellers Visiting Each Destination			
	<u>Asia</u> (322) %	<u>Australia</u> (150) %	<u>U.S.</u> (761) %	<u>Canada</u> (757) %
<u>Admission to Local Attractions</u>	<u>65</u>	<u>71</u>	<u>74</u>	<u>66</u>
Booked before leaving home	8	10	21	6
Booked during trip	57	62	53	60
Did not use	35	29	26	34
<u>Admission to Events</u>	<u>40</u>	<u>48</u>	<u>34</u>	<u>36</u>
Booked before leaving home	6	9	9	5
Booked during trip	34	39	25	31
Did not use	60	52	66	64
<u>Guided Tours at Destinations</u>	<u>50</u>	<u>54</u>	<u>32</u>	<u>37</u>
Booked before leaving home	12	11	5	5
Booked during trip	38	43	26	32
Did not use	51	46	68	64
<u>Other Activities (Recreational Activities, Spa, etc.)</u>	<u>51</u>	<u>62</u>	<u>43</u>	<u>46</u>
Booked before leaving home	7	6	3	5
Booked during trip	45	56	39	41
Did not use	49	38	57	54

Source: Quantitative Survey Q. 17d

Q.17d On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?

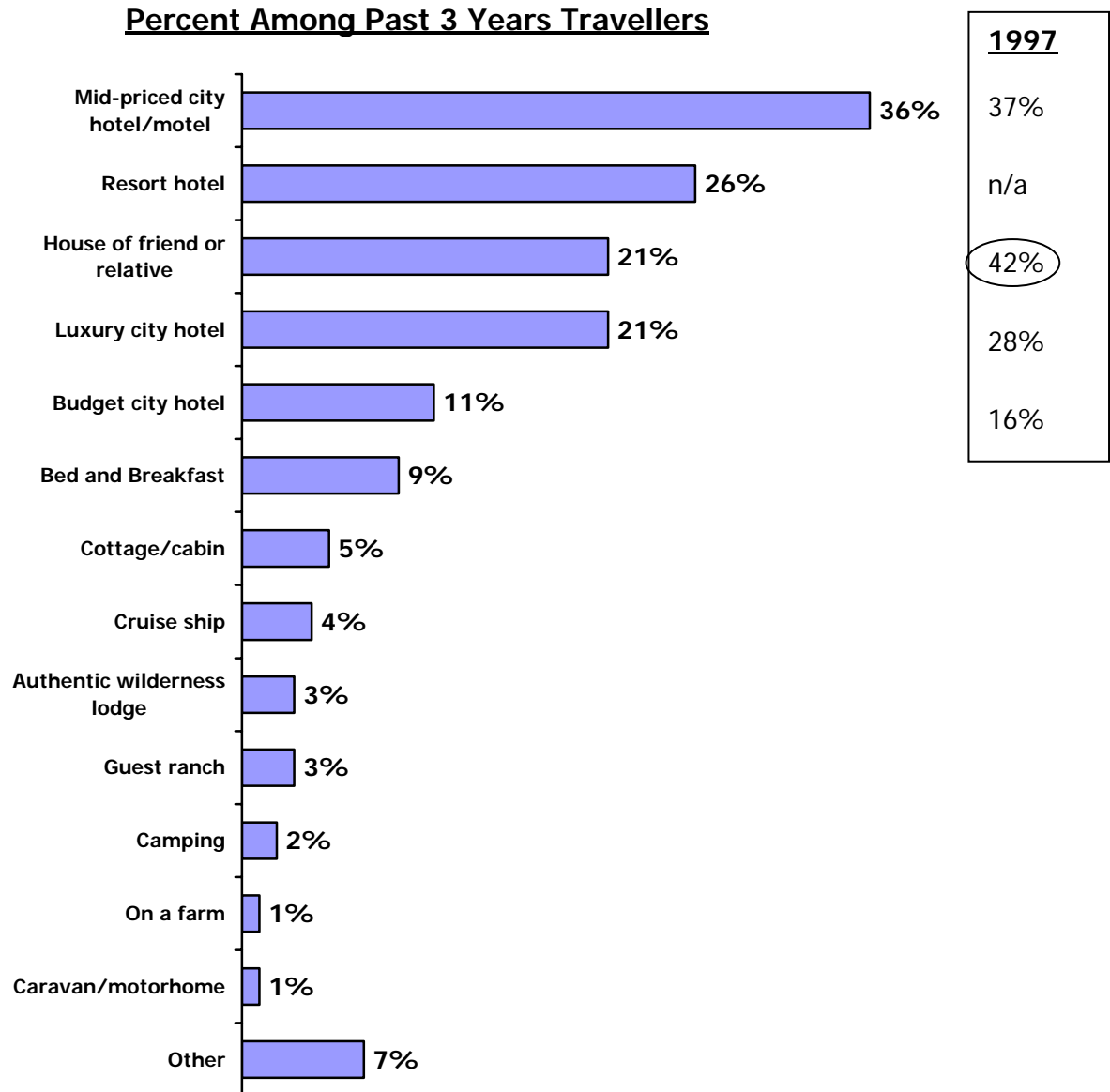


4.15 Accommodation

The British appear budget conscious with accommodation—preferring mid-priced to luxury city hotels. Resorts and the home of friends/relatives round out the top choices.

However, staying with friends/relatives is far less common now than in 1997.

EXHIBIT SECTION 4-15: TYPE OF ACCOMMODATION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.18¹

¹ Base: n=2,232

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



4.16 Accommodation-By Destination

Mid-priced city properties and the home of friends/relatives lead the preferences for Canada. However, the home of a relative or friend is far lower than in 1997 (61%), further evidence that travel for purely a pleasure purpose is expanding.

EXHIBIT SECTION 4-16: TYPE OF ACCOMMODATION — BY DESTINATION

	Percent Among Travellers Visiting Each				Canada 1997
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %	
<u>Accommodation Type</u>					
Mid-priced city hotel/motel	33	39	49	48	35%
Resort	28	23	16	18	n/a
Home of friend or relative	22	49	20	33	61%
Luxury city hotel	33	25	20	23	16%
Budget city hotel	17	24	11	15	22%
Bed and Breakfast	12	25	6	10	
Cottage/cabin	4	9	6	7	
Cruise ship	5	2	4	6	
Authentic wilderness lodge	3	4	2	2	
Guest ranch	3	6	2	2	
Camping	2	5	2	2	
On a farm	1	4	1	1	
Caravan/motor home	2	6	1	2	
Other	4	9	10	5	

Source: Quantitative survey Q.18

Q.18 In what type of accommodation did you stay?
*Less than 0.5%

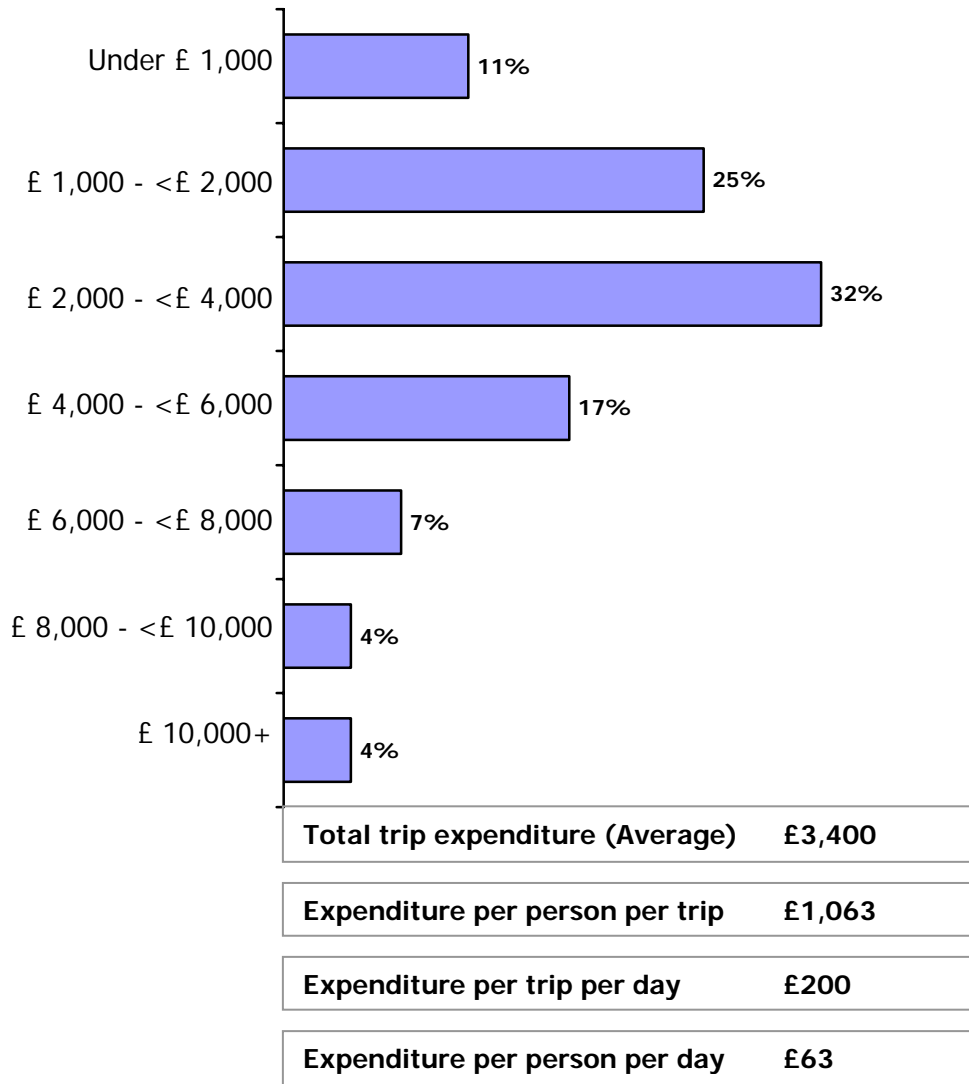


4.17 Trip Expenditure

The average trip expenditure is £3,400, £200 per trip per day.

EXHIBIT SECTION 4-17: TRIP EXPENDITURE — BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19b¹

¹ Base: n=2,232

£100=CAD \$204.99 (Bank of Canada exchange rate– Nov. 28, 2007)



4.18 Trip Expenditure – By Destination

The budget required for a trip to Australia is significantly higher than to Canada due to the longer duration. This is a reminder of one of the advantages of Canada over its Southern hemisphere competitor.

EXHIBIT SECTION 4-18: TRIP EXPENDITURE – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>Expenditure</u>				
Under £1,000	5	5	10	11
£1,000 - <£2,000	27	13	24	27
£2,000 - <£4,000	31	26	32	30
£4,000 - <£6,000	17	20	20	16
£6,000 - <£8,000	8	14	8	8
£8,000 - <£10,000	7	8	3	3
£10,000+	6	14	4	4
Total Trip Expenditure (Avg) £	3,900	5,500	3,400	3,300
Expenditure per person per trip £	1,219	2,200	1,097	1,065
Expenditure per trip per day £	191	156	209	182
Expenditure per person per day £	60	63	67	59

Source: Quantitative Survey Q.19b

£100=CAD\$204.99 (Bank of Canada exchange rate – Nov 28, 2007)

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



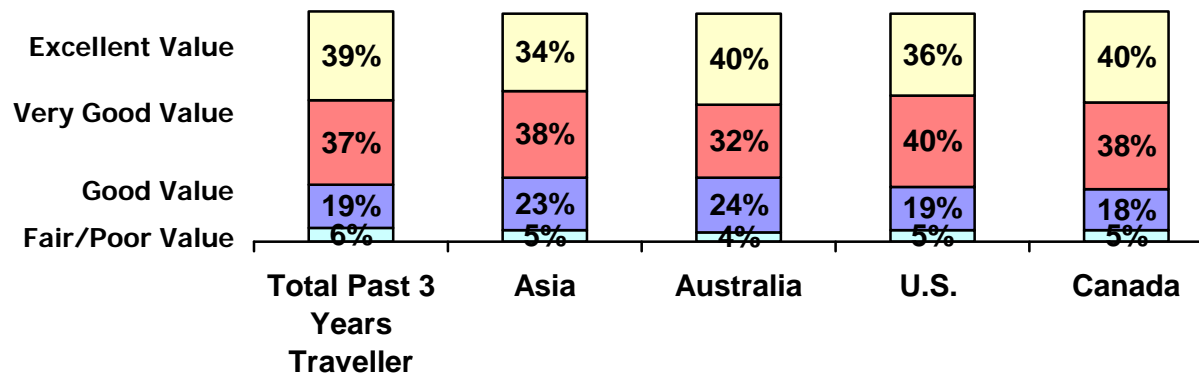
4.19 Value for Money

Canada receives a very good value for money rating. However, there is little difference from other destinations.

EXHIBIT SECTION 4-19: VALUE FOR MONEY

Percent Among Travellers Visiting Each Destination

Value Rating



Top Two Boxes

Excellent/Very Good	75%	72%	72%	76%	78%
---------------------	-----	-----	-----	-----	-----

Source: Quantitative Survey Q19c

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



4.20 Likelihood to Recommend Destination to Other

Nine in ten would recommend Canada to others, confirming solid trip satisfaction. However, again, this is not atypical of other destinations traveled to.

EXHIBIT SECTION 4-20: LIKELIHOOD TO RECOMMEND DESTINATION TO OTHERS

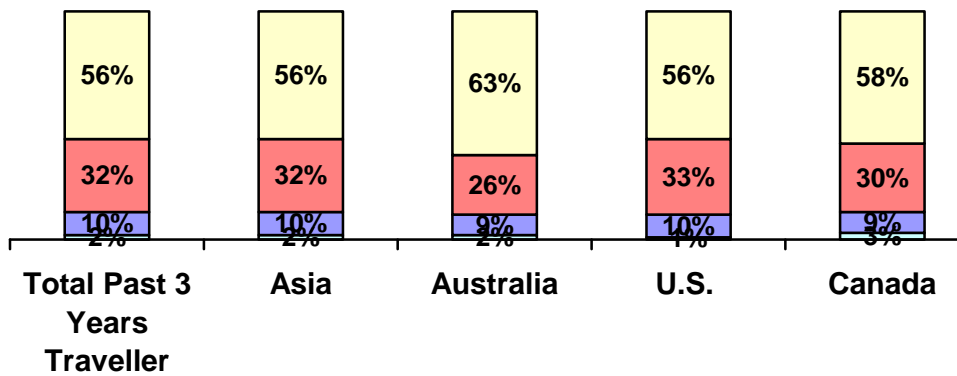
Percent Among Travellers Visiting Each Destination

Likelihood to Recommend

Definitely will

Very likely
Somewhat likely

Not very/at all/definitely not



Top Two Boxes

Definitely/very likely	87%	88%	89%	89%	88%
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Source: Quantitative Survey Q19d

Q. 19d How likely are you to recommend that destination to others?



Section 5: Market Segmentation

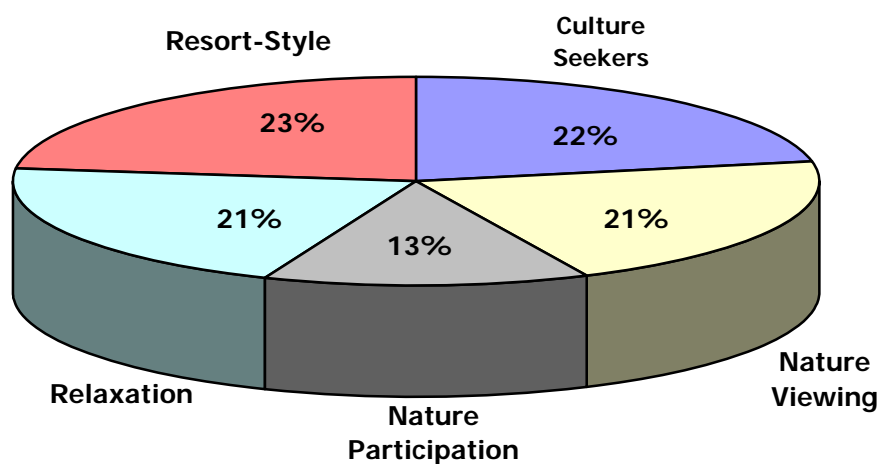


5.1 Segmentation Analysis

Assisted by grassroots learning from the preliminary focus groups, a multi-dimensional rating question was created for the quantitative survey. A modified Howard-Harris cluster analysis method was used to generate a number of segment solutions (2 to 8 groups). These segment solutions were examined in detail to determine the final segment solution of 5 groups, which most simply explained the targets' attitudes. They are named and described based on the attitudes associated with the membership of the segments.

Each of these segments is discussed in detail in the next section.

EXHIBIT SECTION 5-1: SIZE OF MARKET SEGMENT



Source: Quantitative Survey Q.20¹

¹ Base= Past/Future Travellers (n=2,697)

Q.20 Please imagine that you are taking an overseas pleasure trip **beyond the European Union countries, North Africa and the Mediterranean** for 3 nights or longer with at least one night in paid accommodation. For each statement on this page check one box to show how important that reason is to you when considering such a trip.



5.2 Segment Characteristics

Resort-Style (23%)

This segment is family vacation oriented and wanting a wide selection of activities, particularly sun and beach.

Culture Seekers (22%)

Observing the country's unique culture is a dominant interest here—especially museums, galleries, historical sites, entertainment and nightlife and local cuisine.

Relaxation (21%)

Rest and Relaxation is the common bond here.

Nature Viewing (21%)

Being in a clean, healthy and spacious environment, surrounded by beautiful nature and observing wildlife, but all within reach from an urban environment appeals to this group

Nature Participation (13%)

This group is not satisfied with visual stimuli. They want to get involved. Soft adventure prevails.



5.2 Segment Characteristics

EXHIBIT SECTION 5-2: SEGMENT CHARACTERISTICS

	Nature Viewing	Nature Participation	Culture Seekers	Resort Style	Relaxation
Segment Attitudinal Drivers	<ul style="list-style-type: none"> - Surrounded by beautiful unspoiled nature - Experiencing unspoiled nature - Seeing wildlife in nature - Experiencing a wide, spacious outdoor environment - Experiencing a different country's healthy lifestyle - Enjoying the convenience of the modern world while experiencing nature 	<ul style="list-style-type: none"> - Enjoying alpine (downhill) skiing or snowboarding - Participate in active outdoor sports - Staying in accommodations unique to that country - Roughing it - Experiencing aboriginal culture 	<ul style="list-style-type: none"> - Visiting museums or art galleries - Visiting historical attractions - Experiencing a modern culture - Attending theatres, clubs or shows - Seeing as much as possible in the time available - Meeting and interacting with local people - Visiting a local supermarket - Spending time in the home of a resident - Opportunity to try different cuisines 	<ul style="list-style-type: none"> - Sunbathing or other beach activities - Staying at luxury surroundings - Bringing the family together - Availability of a wide selection of activities 	<ul style="list-style-type: none"> - Enjoying a relaxing atmosphere - Feeling secure and safe - Getting away/escaping from the demand of home - Being in a clean, healthy environment - Visiting a place my friends would love to see - Coming home with exciting travel stories



5.2 Segment Characteristics

Resort Style

- Young families dominate

Culture Seekers

- Often older Empty Nestors

Relaxation

- Relatively young and with families

Nature Viewing

- Over 40 and Empty Nestors

Nature Participation

- Definitely under 40, often under 30



5.2 Segment Characteristics

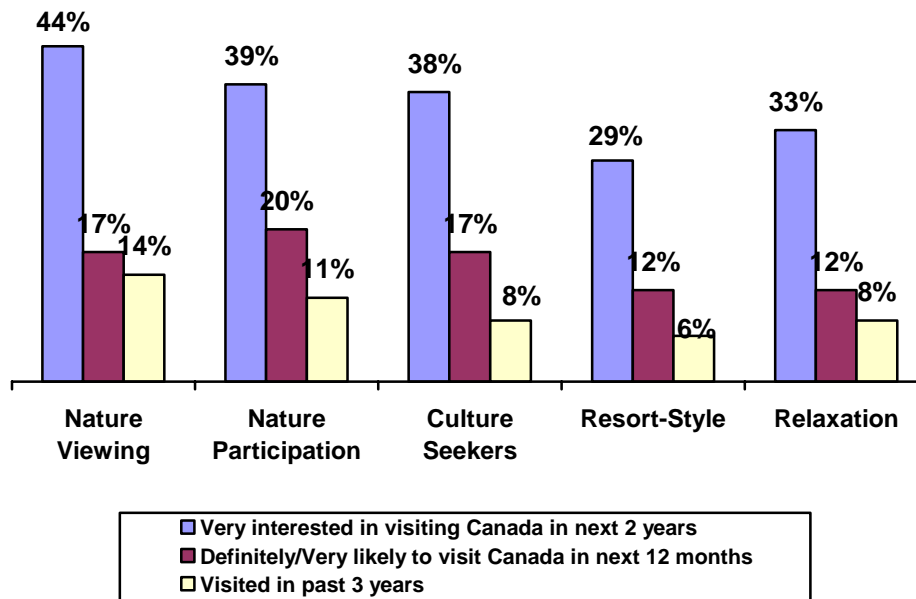
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>Culture Seekers</u>	<u>Resort-Style</u>	<u>Relaxation</u>
Profile Skews					
Gender					
Male	50	58	45	45	52
Female	50	42	55	55	48
Marital Status	Married with no young children at home	Mixed of married/living together and singles	Mixed of married and singles/ divorced/ widowed with no young children at home	Married with children	Married with children
Age					
18 to 29	11	35	13	29	23
30 to 39	16	22	20	28	27
40 to 49	22	18	18	20	18
50-59	19	13	16	10	19
60+	32	12	33	13	13
Household Income (annual gross £)					
Under £20,000	16	16	24	14	13
£20,000 - <£25,000	13	12	11	9	13
£25,000 - <£30,000	10	14	11	9	13
£30,000 - <£40,000	15	17	17	18	16
£40,000 - <£50,000	17	9	9	12	15
£50,000+	17	15	16	23	16
Recent Trip Expenditure (£)					
Under £2,000	32	38	44	32	36
£2,000 - <£4,000	32	30	29	34	34
£4,000 - <£6,000	18	20	14	16	16
£6,000 - <£8,000	8	7	5	8	8
£8,000+	10	6	8	10	6
Average (£ UK Pounds)	3,600	3,300	3,200	3,700	3,200



5.3 Current Plans to Visit Canada

Nature Viewing and Nature Participation segments are the two key targets for Canada along with Culture Seekers, based on interest and past experience.

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



Source: Quantitative Survey Q.7, 22, 23¹

¹ Base=Past/Future Travellers (n=2,697)

Q.7 (ASK THOSE WHO ANSWERED 1+ IN Q.4, OTHERS SKIP TO Q.20) (ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF NONE IN Q.4)
During the past 3 years which of these countries or destinations outside **U.K.** did you visit for pleasure and stayed for 3 nights or longer with at least one night in paid accommodation, if any?

Q.22 How interested are you in visiting United States, Canada, Australia or South East Asia in the **next two years**?

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



5.4 Ideal Trip to Canada by Segment

Here is the ideal Canadian trip for each of the 3 key target segments:

Nature Viewing

This segment wants a wide and varied nature viewing experience in Canada—including seeing rivers and waterfalls, wilderness areas and observing wildlife. They like the notion of staying in resorts close to nature (in particular lakeside and/or mountain resorts), but also express significant interest in authentic cabins or lodges.

April to September is the preferred season, 15 nights the ideal duration.

Key provinces of interest include BC and Ontario, but a significant minority would also like to see Quebec, Alberta and Atlantic Canada.

Nature Participation

As a younger group, these individuals show particular interest in outdoor activity—canoeing, kayaking, cycling, dog sledding, snowmobiling and serious skiing.

Less interested in city hotels, this group prefers mountain or lakeside resorts.

April to September the best months, 15 nights the ideal duration, BC and Ontario are the preferred provinces to visit.

Culture Seekers

Often empty nesters, this segment wants to see Canadian culture — taking city tours, seeing old architecture, museums and art galleries and getting to know local inhabitants.

While seeing Niagara Falls and the Rockies are very high on the agenda, active involvement in nature holds little appeal.

April to September is the preferred months of travel, 15 nights in duration, B.C., Ontario and Quebec all desirable destinations.



5.4 Ideal Trip to Canada

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

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>Culture Seekers</u>	<u>Resort- Style</u>	<u>Relaxation</u>
	(610) %	(326) %	(551) %	(494) %	(479) %
<u>Ideal Next Trip</u>					
<u>Season</u>					
January-March	6	13	4	11	8
April-June	31	30	32	26	23
July-September	52	45	47	46	54
October-December	11	12	17	17	15
<u>Duration</u>					
# of nights (avg)	15.0	14.8	14.5	14.2	13.9
<u>Provinces Likely to Visit</u>					
B.C.	66	59	60	60	60
Ontario	59	54	63	63	61
Quebec	35	35	44	40	35
Alberta	33	31	33	26	22
Nova Scotia	21	22	16	11	14
Newfoundland and Labrador	14	20	14	12	10
North West Territories	13	21	11	7	6
Yukon	13	16	9	7	5
Saskatchewan	8	10	9	7	4
PEI	11	12	11	6	8
Manitoba	6	12	6	3	4
New Brunswick	7	13	6	3	5
Nunavut	5	8	5	4	2
<u>Would Also Visit Overnight or Longer</u>					
U.S.A	44	46	48	48	47
Other countries	10	17	11	11	10
Canada only	51	43	47	49	50
<u>Type of Tour</u>					
<u>Group Tour</u>	15	14	17	9	11
Prefer: All days organized	7	7	8	3	5
Many free days	8	7	9	5	6
<u>FIT (non-group)</u>	85	86	83	91	89
Prefer: Package	29	28	27	46	49
Non-Package	56	58	56	45	40

Source: Quantitative Survey Q.25

Q.25 Thinking about your next trip to Canada, if you were to go, describe your ideal trip



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Nature Viewing	Nature Participation	Culture Seekers	Resort- Style	Relaxation
	(610) %	(326) %	(551) %	(494) %	(479) %
Transportation Between Centres					
Air	70	69	70	73	74
Rail	75	68	75	63	64
Rental car	63	61	57	68	64
Motor coach	33	35	37	25	30
Private car	22	27	24	26	26
Motor home/camper	24	33	16	17	16
Accommodation					
City hotel	32	21	48	42	44
Mountain resort	40	42	31	41	37
Lakeside resort	44	33	34	32	33
Seaside resort	11	13	13	24	26
Authentic wilderness cabin or lodge	22	25	14	15	10
Bed and Breakfast	18	19	20	10	10
Home of friend or relative	9	14	16	10	9
Ski resort	4	14	3	16	10
On a ranch	11	9	6	8	5
Coastal cruise ship	12	6	7	5	6
Canadian Spa	4	9	6	5	6
Caravan/motor home	7	9	4	4	2
On a farm	5	5	3	2	1
Camping	2	6	2	1	1

*Less than 0.5%



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Nature Viewing	Nature Participation	Culture Seekers	Resort -Style	Relaxation
	(610) %	(326) %	(551) %	(494) %	(479) %
Activities					
Viewing rivers or waterfalls	96	88	94	85	83
Viewing mountains	93	84	88	82	80
Observing wildlife in their natural environment	94	81	81	69	72
Visiting places of historical interest	90	68	92	69	67
Visiting small towns	84	78	86	69	72
Visiting wilderness areas	87	82	73	64	63
Seeing beautiful beaches and coastlines	82	64	71	71	68
Taking city tours	69	58	85	71	70
Experiencing French Canadian culture and cuisine	76	65	76	70	64
Getting to know the local inhabitants	76	74	81	62	57
Visiting world heritage sites	79	70	82	57	55
Seeing old architecture	77	63	81	54	53
Whale watching	73	70	63	60	60
Taking nature tours	80	72	68	48	54
Visiting museums or art galleries	70	57	86	51	47
Viewing Aurora Borealis (Northern Lights)	62	65	60	57	55
Taking a rail tour	65	54	67	46	53
Attending festivals or fairs	54	57	63	58	50
Attending theatres, clubs or shows	43	49	64	57	50
Seeing modern architecture	54	48	69	45	46
Trekking in a nature area	60	70	43	44	38
Aboriginal cultural experiences, celebrations, and attractions	53	56	53	36	36
Viewing autumn leaves	54	48	53	35	40
Taking a wine/culinary tour	42	41	49	39	37
Visiting a spa	29	38	34	44	40
Taking a cruise	37	38	40	34	36



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>Culture Seekers</u>	<u>Resort -Style</u>	<u>Relaxation</u>
	(610) %	(326) %	(551) %	(494) %	(479) %
<u>Activities</u>					
Visiting friends or relatives	31	41	37	32	32
Trail riding on horseback	30	47	26	34	27
Attending rodeos	28	38	29	31	26
Taking a garden or flower tour	37	30	40	19	24
Canoeing/kayaking/boating	25	55	16	30	22
Dog sledding	25	44	23	29	23
Snowmobiling	19	44	15	34	22
Cycling	22	41	16	28	19
Downhill skiing or snowboarding	10	45	11	32	20
Visiting casinos	9	24	14	21	26
Heli/cat skiing	7	33	7	18	12
Sports fishing	11	21	6	12	12
Golfing	6	17	7	13	14
Hunting	4	22	6	7	8

Source: Quantitative Survey Q.25

Q.25 Thinking about your next trip to Canada, if you were to go, describe your ideal trip



Section 6: Travellers Profile

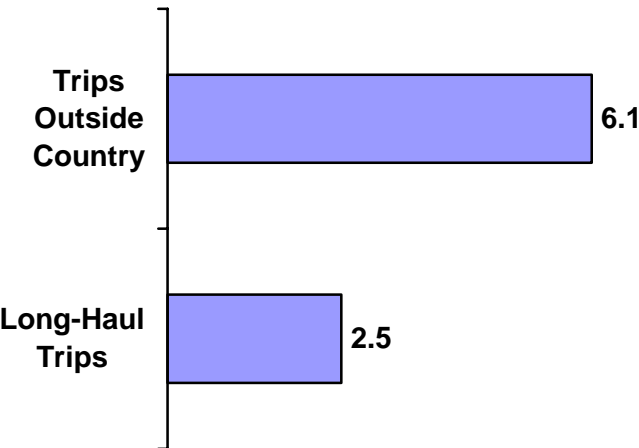


6.1 Trip Frequency

The British traveller took 6.1 trips outside their country during the past 3 years, about 4 in 10 long-haul (2.5).

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

Among Past 3 Years Travellers



Source: Quantitative Survey Q3c, Q4¹

¹ Base= past 3 year travellers (n=2,232)

- Q.3c In the past three years, that is since September, 2004, how many times have you, yourself, taken a **pleasure trip outside of your home country for 3 nights or longer with at least one night in paid accommodation**. Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.
- Q.4 In the past three years, that is since September, 2004, how many times have you, yourself, taken a **pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation?** Again, please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.



6.2 U.K. Long-haul Travel Market Profile

The age of the Canadian visitors is considerably younger than in 1997 (44 years vs. 51 years average).

However, they are still somewhat older than visitors from other countries. Four in ten (41%) are age 50+, compared to 25% for France and 24% among German visitors.

As many as 58% have close friends or relatives in Canada. This is a very high level and is a reminder of the influence those individuals must have in the decision process, discussed in more detail later. However, in 1997, a full 74% of recent visitors to Canada had friends or relatives here. This talks to how the market is broadening out over time including more purely pleasure driven trips.

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

	Percent Among Travellers Visiting Each				
	Asia	Australia	U.S.	Canada	
	(382)	(165)	(832)	(884)	
	%	%	%	%	
<u>Age</u>					
18 – 29	31	25	19	19	
30 – 39	20	20	25	24	
40 – 49	15	15	21	17	
50 – 59	13	12	14	22	
60+	22	28	20	19	
<u>Average age</u>	41.7	43.8	43.6	44.1	51.0
<u>Gender</u>					
Male	52	45	53	45	55%
Female	48	55	47	55	45%
<u>City</u>					
South East	18	25	19	22	
Greater London	20	20	13	13	
South West	13	11	9	9	
North West/Merseyside	9	4	12	9	
Scotland	6	7	12	14	
West Midlands	9	7	9	6	
Yorkshire/Humberside	6	9	6	6	
East Midlands	5	5	8	8	
North East	5	6	5	4	
Wales	5	2	4	5	
Eastern	5	4	3	4	
<u>Close friends/relatives in Canada</u>					
Yes	30	35	29	58	74%
No	68	64	69	42	26%



6.2 U.K. Long-haul Travel Market Profile

Percent Among Travellers Visiting Each					Canada 1997
	Asia	Australia	U.S.	Canada	
	(382) %	(165) %	(832) %	(884) %	
<u>Marital Status</u>					
Married/living with someone	69	63	69	73	61%
Single	22	21	21	19	23%
Divorced/widowed/separated	9	16	10	8	16%
<u>Household Composition</u>					
Adults only	64	65	68	70	78%
With children<18	36	35	32	30	22%
<u>Occupation</u>					
<u>Total employed</u>	<u>65</u>	<u>59</u>	<u>65</u>	<u>63</u>	<u>70%</u>
Semi or unskilled manual worker	4	5	5	3	
Skilled manual worker	6	6	5	5	
Supervisory or clerical / junior managerial / professional / administrative	19	19	23	20	
Intermediate managerial / professional / administrative	18	13	18	21	
Higher managerial / professional / administrative	8	7	5	7	
Self employed	6	5	6	6	
Employed part-time	4	5	4	3	
Student	9	6	7	6	
Housewife/husband	6	9	6	5	
Retired/semi-retired	19	23	19	20	
Other	*	1	1	1	

* Less than 0.5%



6.2 U.K. Long-haul Travel Market Profile

	<u>Percent Among Travelled on FIT Package</u>			
	<u>Asia</u> (382) %	<u>Australia</u> (165) %	<u>U.S.</u> (832) %	<u>Canada</u> (884) %
<u>Education</u>				
Less than secondary/secondary school	13	16	19	17
A levels/Scottish highers/GNVQ/BTEC	28	31	34	31
Undergraduate degree or equivalent	35	41	28	32
Post graduate degree or equivalent	23	12	18	19
<u>Household Income (annual gross £)</u>				
Under £20,000	15	11	14	14
£20,000 - <£25,000	10	8	11	8
£25,000 - <£30,000	13	14	10	10
£30,000 - <£40,000	18	19	18	16
£40,000 - <£50,000	10	11	13	13
£50,000+	19	21	21	21

Source: Quantitative Survey Q.1,2,3a,28-34 (basic data)

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

<£20,000 = <\$40,998 CAD

£20,000 - <£25,000 = \$40,998 - <\$51,248 CAD

£25,000 - <£30,000 = \$51,248 - <\$61,497 CAD

£30,000 - <£40,000 = \$61,497 - <\$81,996 CAD

£40,000 - <£50,000 = \$81,996 - <\$102,495 CAD

£50,000+ = \$102,495+ CAD



Section 7: The Canadian Opportunity



7.1 Aspirational Destinations

Canada ranks 3rd as a near term destination priority for British long-haul travellers.

The U.S. ranks 1st which clarifies that America as a significant competitor, as is Australia (ranking 2nd).

EXHIBIT SECTION 7-1: LONG-HAUL DESTINATION PRIORITY

Rank	
1	United States
2	Australia
3	Canada
4	Caribbean
5	New Zealand

Source: Quantitative Survey Q6¹

¹ Base=Past/Future Travellers (n=2,697)

- 6a Thinking of future travel **beyond the European Union countries, North Africa and the Mediterranean**, what countries would you be likely to visit on a pleasure trip for 3 nights or longer with at least one night in paid accommodation in the next two years? Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only. (Please select your most likely choices with up to 5 countries from the list below or write in your choices if not listed) (PN: LIST FROM Q.7 WITH CODES 14-31, 46-50, 52 SUPPRESSED)
- 6b From the countries you selected please rank those countries starting with the one you would likely to visit first, then second, third and so on.
(PROGRAMMING: SHOW Up to 5 DESTINATIONS SELECTED IN 6a)(If only one selected in Q6a skip to Q7)



7.2 Priority Analysis – by Segment

While Canada ranks 3rd overall, it is higher among certain sectors—namely repeat travellers (1st), and those with friends and relatives in Canada (2nd).

EXHIBIT SECTION 7-2: CANADA'S PRIORITY RANKING KEY SEGMENT

	Canada's Priority Ranking
	#
<u>Total</u>	3 rd
<u>Gender</u>	
Male	3 rd
Female	4 th
<u>Age</u>	
18 – 29	4 th
30 – 39	3 rd
40 – 49	4 th
50 – 59	2 nd
60+	3 rd
<u>Travelled to Canada in Past 3 Years</u>	1 st
<u>Friends and Relatives in Canada</u>	
Yes	2 nd
No	4 th

Source: Quantitative Survey Q.6b

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

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



7.3 Ideal Trip to Canada

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

Season:	Likely April to September
Duration in Canada:	2 weeks
Type of trip:	FIT
Many also visit:	The U.S. (47%)
Intercity:	Rail is exceptionally popular as an intercity mode (likely reflecting the high interest in The Rocky Mountaineer). Car rental and air are also appealing.
Accommodation:	Canadian resorts (mountain or lakeside) and/or city hotels.
Activities:	Prospective British visitors have a very active to do list—including viewing rivers, waterfalls, mountains and wildlife, historical sites, smaller towns and getting to know local inhabitants.



7.3 Ideal Trip to Canada

EXHIBIT SECTION 7-3: IDEAL TRIP TO CANADA — BY PROSPECTIVE MARKET

	Percent Among Prospective Market*
	(1152) %
<u>Ideal Next Trip</u>	
<u>Season</u>	
January – March	10
April – June	28
July – September	47
October – December	15
<u>Duration</u>	
# of nights (avg.)	14.8
<u>Provinces Likely to Visit</u>	
B.C.	63
Ontario	58
Quebec	38
Alberta	34
Nova Scotia	18
Newfoundland and Labrador	14
Northwest Territories	12
Yukon	11
Saskatchewan	10
PEI	10
Manitoba	7
New Brunswick	7
Nunavut	6
<u>Would also visit overnight or longer</u>	
U.S.A	47
Other countries	13
Canada only	47
<u>Type of tour</u>	
Group tour	13
Prefer: All days organized	5
Many free days	8
<u>FIT (non-group)</u>	88
Prefer: Package	33
Non-package	55



7.3 Ideal Trip to Canada

	Percent Among <u>Prospective Market*</u>
	(1152) %
<u>Transportation Between Centres</u>	
Air	69
Rail	67
Rental car	64
Motor coach	31
Private car	29
Motor home/camper	21
<u>Accommodation</u>	
Mountain resort	40
City hotel	35
Lakeside resort	34
Seaside resort	16
Authentic wilderness cabin or lodge	16
Home of friend or relative	16
Bed and breakfast	15
Ski resort	11
On a ranch	8
Canadian spa	6
Coastal cruise ship	6
Caravan/motor home	5
On a farm	3
Camping	2



7.3 Ideal Trip to Canada

	Percent Among Prospective Market*
<u>Activities</u>	(1152) %
Viewing rivers or waterfalls	90
Viewing mountains	85
Visiting places of historical interest	79
Visiting small towns	79
Observing wildlife in their natural environment	78
Visiting wilderness areas	75
Getting to know the local inhabitants	73
Taking city tours	72
Seeing beautiful beaches and coastlines	71
Visiting world heritage sites	71
Experiencing French Canadian culture and cuisine	70
Seeing old architecture	68
Taking nature tours	66
Visiting museums or art galleries	64
Whale watching	62
Attending festivals or fairs	58
Taking a rail tour	58
Viewing Aurora Borealis (Northern Lights)	57
Seeing modern architecture	55
Trekking in a nature area	53
Attending theatres, clubs or shows	53
Aboriginal cultural experiences, celebrations, and attractions	50
Viewing autumn leaves	48
Taking a wine/culinary tour	44
Visiting friends or relatives	40
Visiting a spa	37
Taking a cruise	37
Trail riding on horseback	35
Taking a garden or flower tour	31
Canoeing/kayaking/boating	30
Dog sledding	30



7.3 Ideal Trip to Canada

	Percent Among Prospective Market*
<u>Activities</u>	(1152) %
Attending rodeos	30
Snowmobiling	28
Cycling	26
Downhill skiing or snowboarding	25
Visiting casinos	17
Heli/cat skiing	15
Sports fishing	14
Hunting	12
Golfing	11

Source: Quantitative Survey Q.24

Q.25 Thinking about your next trip to Canada, if you were to go, describe your ideal trip

*Very interested in visiting Canada in next 2 years.



Section 8: The Buy Cycle Model



8.1 The Buy Cycle Model – U.K.

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".

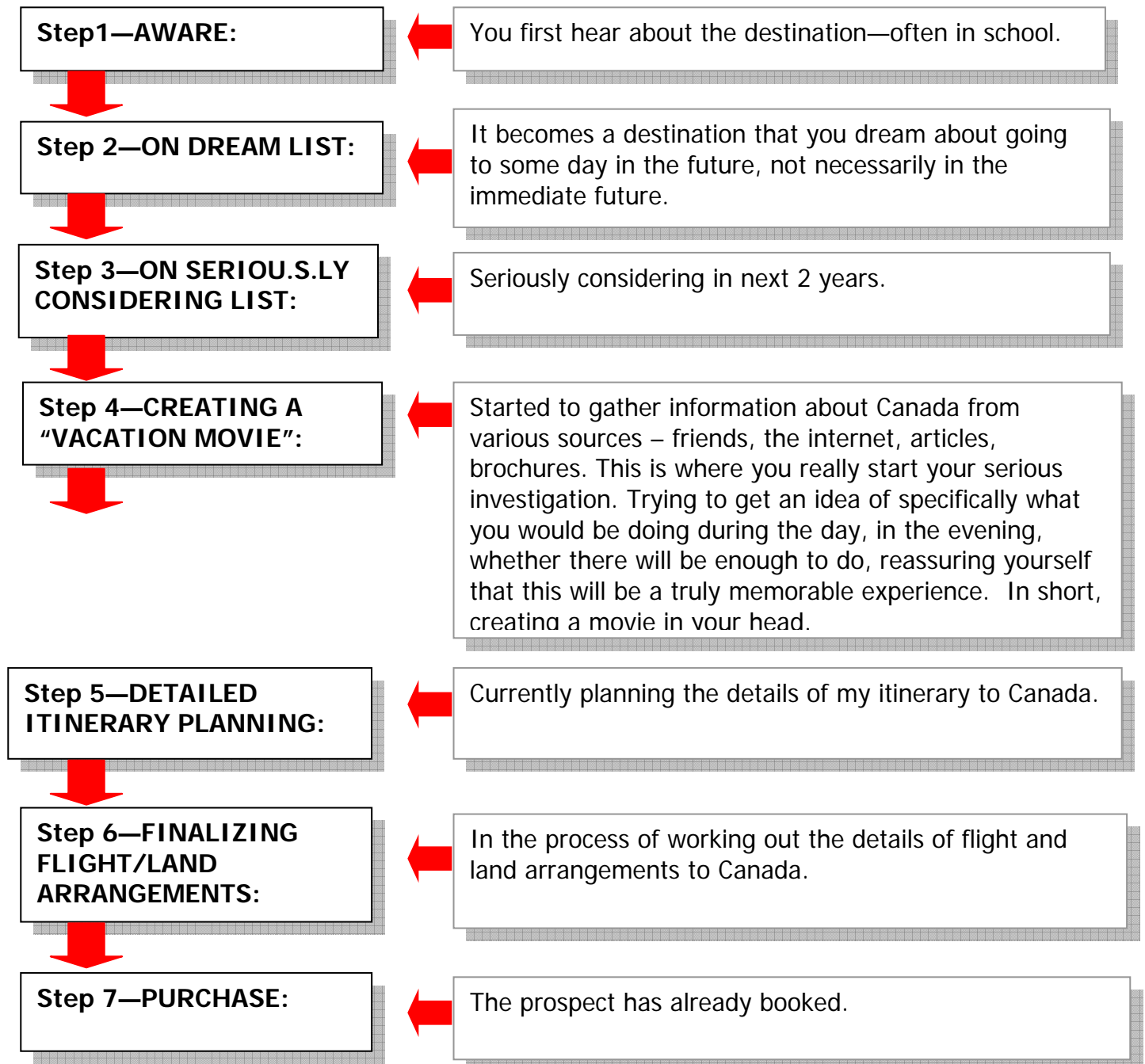


8.1 The Buy Cycle Model – U.K.

a) How it Works

- The model is described below:

EXHIBIT SECTION 8-1: BUY CYCLE MODEL – HOW IT WORKS



8.1 The Buy Cycle Model – U.K.

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

- 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.)*
- Common influencers to get a destination on the “Dream List” include:
 - TV shows
 - Friends who have been there
 - Feature films



8.1 The Buy Cycle Model – U.K.

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.

Further, travel is important as status and to visit an uncommon destination **first** creates **bragging** rights.

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)
- Brochures from travel agents (to get itinerary ideas, not necessarily to purchase)
- Friends and relatives at the destination
- Magazine articles
- Television shows



8.1 The Buy Cycle Model – U.K.

Step 5 –Detailed Itinerary Planning

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

Step 6 – Finalizing Flight/Land Arrangements

- Often on the net, but many are agents.

Step 7 – Purchased

- The trip is now sold.



8.1 The Buy Cycle Model – U.K.

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

- 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.

Step 3 – Getting on the Serious Consider List

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 feel within reach”*
- A desire to go there before health deteriorates (a finding which supports the popularity of Canada among the age 50+).



8.1 The Buy Cycle Model – U.K.

- 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.

Step 4 – Creating a Detailed “Movie”

- *“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”*

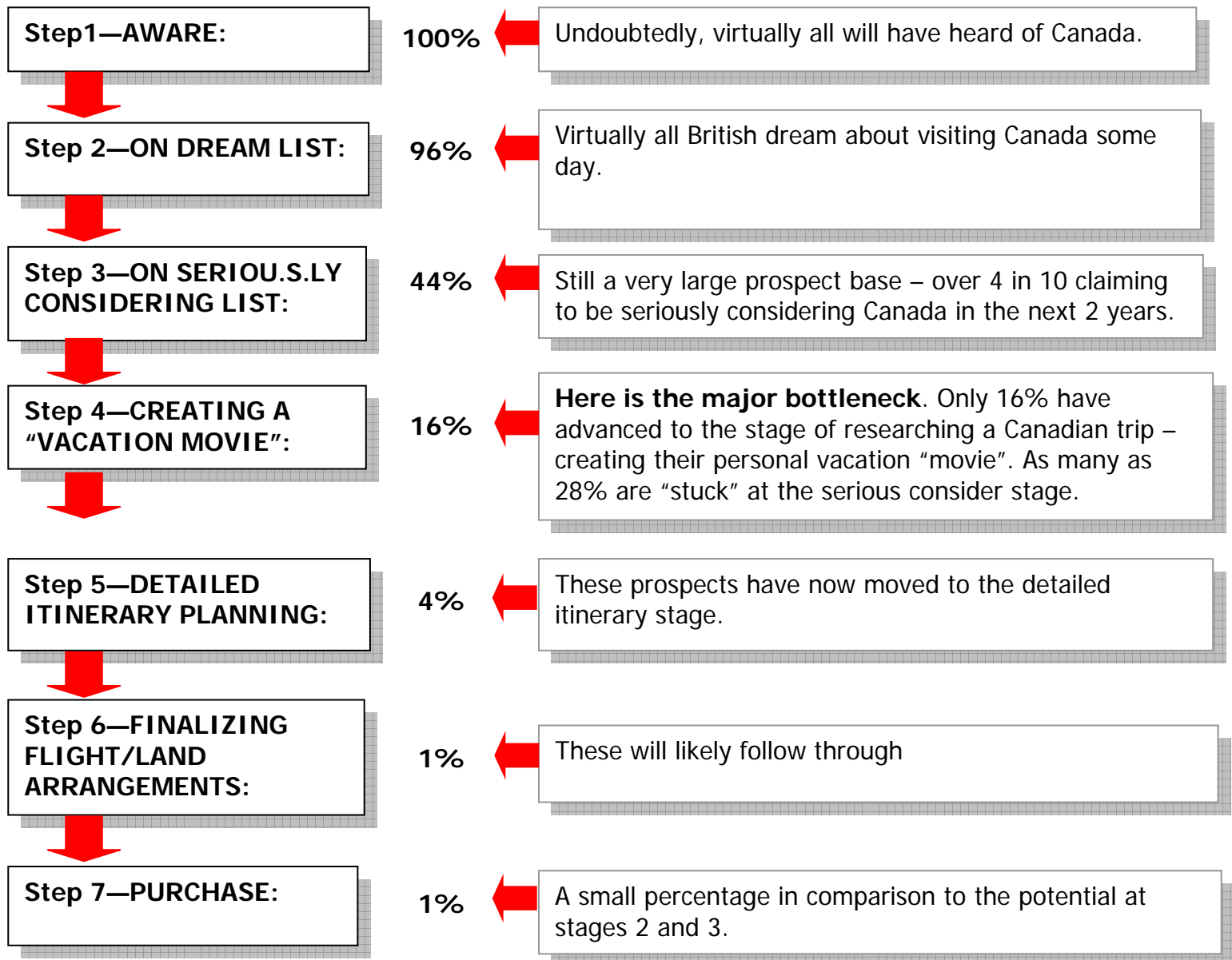


8.1 The Buy Cycle Model – U.K.

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.

EXHIBIT SECTION 8-2: BUY CYCLE MODEL – BOTTLENECKS AND BARRIERS - CANADA

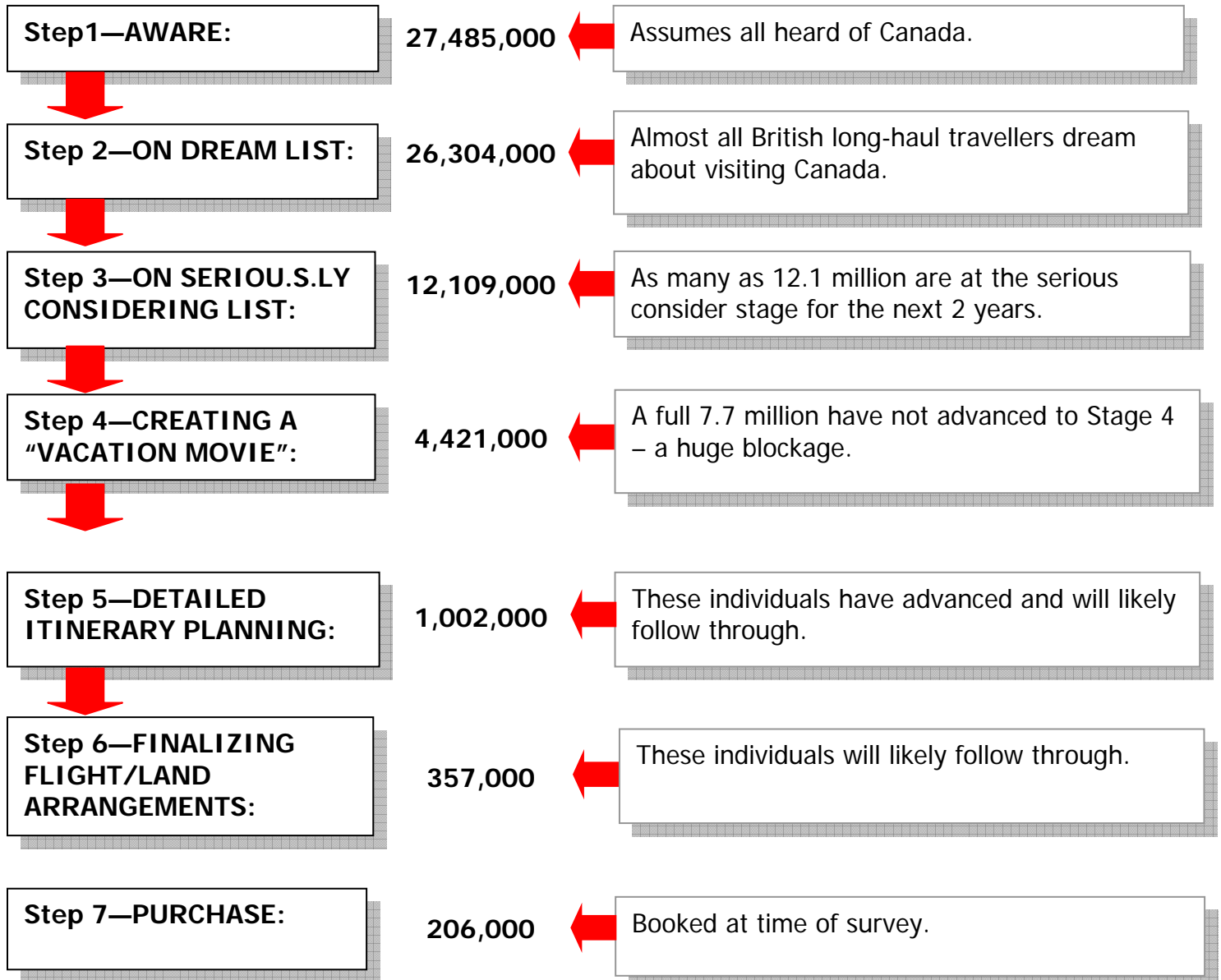


8.1 The Buy Cycle Model – U.K.

e) Projected Market Size

- There are 27.5 million potential long-haul travellers in the U.K. out of a population of 47,634,000 age 18 and over.

EXHIBIT SECTION 8-3: BUY CYCLE MODEL – PROJECTED MARKET SIZE



8.1 The Buy Cycle Model – U.K.

Implications

The Partners need to focus more on **Stage 4** – helping serious prospects create their personal Canadian vacation movie, rather than building initial awareness, (Stage 1), getting Canada on the Dream List (Stage 2) or even on the Serious Consider List (Stage 3).

Access to Detail

To create a “movie”, prospects need access to detail – especially itinerary ideas.

- Given the importance of the internet they must be strongly encouraged to visit the most appropriate Canadian websites.
- Once on these sites they need help in creating itinerary ideas.
- Then, to elaborate on key attractions and locations on route, short video clips can work very effectively, as well as any other descriptive material that will aid the prospect in visualizing him/herself in the scene having a wonderful time.
- Blogs from past visitors are also welcome, as long as they are trustworthy as legitimate experiences by real travellers.

Viral Marketing

- Friends, especially previous visitors or residents are so highly influential that the Partners need to seriously explore viral marketing ideas.
- Ways must be developed to encourage friends or past visitors to “spread the word”.

Itinerary Ideas

- One of the reasons agent/operator brochures are popular sources of “movie” planning is because they provide itinerary ideas and help the prospects get their heads around their personal vacation concept. Consequently, advertising can focus on promising “brilliant” itinerary ideas on the Partners’ websites.



8.1 The Buy Cycle Model – U.K.

Fighting Procrastination

- Facilitating personal “movie” creation helps the prospective visitor to stimulate themselves and drive them toward moving on their dream.
- However, industry advertising for low cost flights also helps to communicate viability (“Canada seems so much closer when the fare is so low”), as do ads featuring time specific special events.
- Procrastination is Canada’s worst enemy. Helping prospective visitors generate their own excitement is the best route to stimulating near term travel.



Section 9: Regional Opportunities

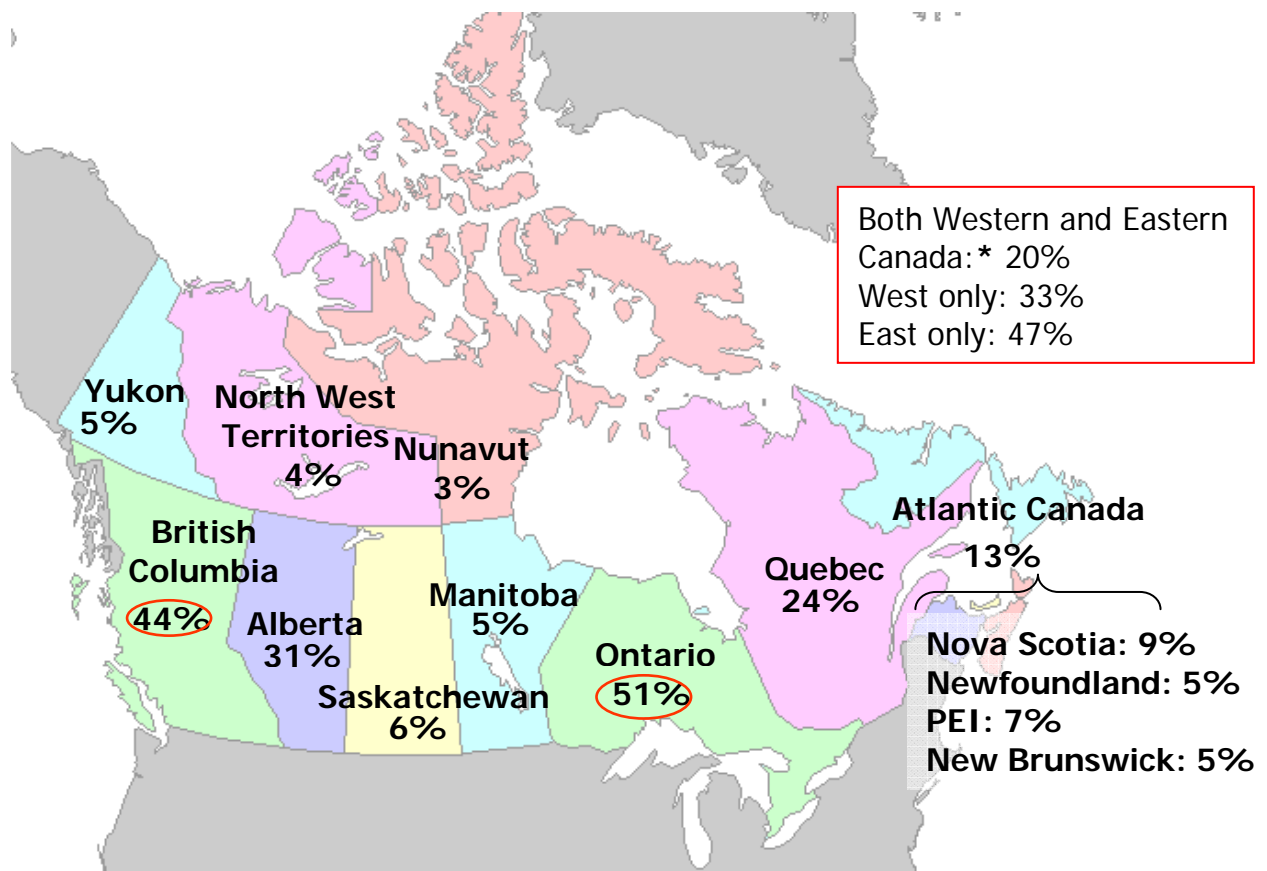


9.1 Places Visited in Canada

Ontario and British Columbia were the most popular provinces to visit by Brits (by 51% and 44%, respectively) on their last trip. Alberta and Quebec also generated solid traffic (31% and 24% respectively). Atlantic Canada attracted 13%.

Cross-Canada travel, though, appealed to only 20% while the majority focused on only one region (east or west).

EXHIBIT SECTION 9-1: PLACES VISITED IN CANADA



Source: Quantitative Survey Q.8b1

¹ Base = Past 3 years travellers to Canada (n=884)

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

*Eastern Canada includes Ontario, Quebec and Atlantic Canada

Western Canada includes Manitoba, Saskatchewan, Alberta, British Columbia



9.2 Provinces Visited in Canada — Trends

In the past 10 years, Western Canada has become far more popular than in 1997.

EXHIBIT SECTION 9-2: PROVINCES VISITED TRENDS

	<u>1997</u>	<u>2007</u>
	%	%
<u>Provinces Visited Most Recent Trip</u>		
Ontario	58	51
British Columbia	29	44
Quebec	25	24
Alberta	22	31
Newfoundland	5	5
Manitoba	1	5

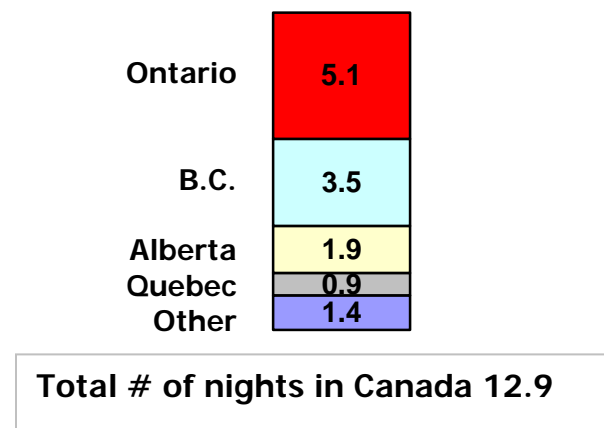


9.3 Duration – By Province

Ontario captured an average of 5.1 nights of the 12.9 spent in Canada, ahead of British Columbia (3.5 nights) and Alberta (1.9 nights) and each of the other regions.

EXHIBIT SECTION 9-3: NUMBER OF NIGHTS SPENT IN EACH PROVINCE

Among Past 3 Years Travellers to Canada



Source: Quantitative Survey Q.10d¹

¹ Base= n=884

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



9.4 Trip Characteristics

British Columbia

Among UK travellers visiting British Columbia, half also ventured into Alberta, one-quarter the Yukon, but only 4 in 10 Eastern Canada on the same trip.

Time in Canada averaged 20 nights, 8 of which were in British Columbia.

Other trip characteristics:

- Season – April to September.
- FIT – 84% FIT, as many as 54% no package.
- Accommodation—Mid-priced hotels/motels most common, followed by resort hotels and the home of friends/relatives.
- Purpose of Trip--Beyond nature, visitors wanted to see new places, experience the local culture and relax and unwind, often with local friends or relatives.

Alberta

Visits to Alberta are usually in conjunction with a BC visit (78%), but only in a minority of cases Eastern Canada (37%). As with BC, most UK residents are focused on one region, not a cross Canada trip.

Alberta captures 6.4 nights out of a 15.1 nights in Canada.

Other trip characteristics:

- Season – April to September preferred
- FIT – 79% FIT, 52% no package.
- Accommodation – resorts and mid-price city hotels dominate on the trip.
- Purpose of trip – very similar to B.C. Beyond nature, visitors wanted to see new places, experience the local culture and relax and unwind, often with local friends or relatives.



9.4 Trip Characteristics

Ontario

UK visitors to Ontario spent most of their time within the province—as many as 9 out of 13 nights in Canada on average. Only 30% also visited Western Canada and only 33% Quebec.

Further, only 10% of Ontario visitors spend less than 5 nights away from home, so the incidence of weekend trips to Toronto at this point will be quite low.

Other trip characteristics:

- Season – Spring and Summer most common.
- FIT – 86% FIT, as many as 62% no package.
- Accommodation – Mid-priced city hotels/motels most popular commercial accommodation.
- Purpose of trip – Enjoying nature, but also experiencing the Canadian way of life – seeing new places, visiting and socializing with friends/relatives and enjoying the culture.

Atlantic Canada

Many UK visitors to Atlantic Canada are on an extensive cross-Canada trip –47% visiting Western Canada, 49% Ontario and 47% Quebec on the same journey.

Atlantic Canada, however, does captures 6 nights out of a total of 13 nights in Canada on average.

Other trip characteristics:

- Season – April to September.
- FIT – 94% FIT, groups only 6%.
- Accommodation – A mix of hotels/motels at different price levels and B&B's are common commercial properties.
- Purpose of trip – Experiencing local culture and interacting with locals is very important. However, seeing beautiful nature as well as regional history are also popular.



9.4 Trip Characteristics

EXHIBIT SECTION 9-4: TRIP CHARACTERISTICS — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip			
	British	Alberta	Ontario	Atlantic
	Columbia			
	(401)	(281)	(490)	(102)
	%	%	%	%
<u>Other Canadian Regions Visited</u>				
Western Canada (net)	100	100	30	47
British Columbia	100	78	26	45
Alberta	54	100	18	28
Saskatchewan	11	18	6	16
Manitoba	9	11	7	17
Yukon/NWT/Nunavut	23	26	13	59
Eastern Canada (net)	38	37	100	100
Ontario	33	34	100	49
Quebec	19	20	34	47
Atlantic	13	11	11	100
Nova Scotia	9	10	8	74
Newfoundland/Labrador	8	8	6	41
PEI	8	9	6	52
New Brunswick	6	7	6	43
<u>Duration (Avg)</u>				
Total nights on trip	19.7	19.7	18.9	22.1
Nights in Canada	14.7	15.1	13.1	13.3
Nights in province	8.0	6.4	9.0	5.9
<u>Month of Travel</u>				
January-March	14	11	10	13
April-June	32	30	29	29
July-September	45	47	44	45
October-December	10	12	17	13
<u>FIT vs. Group</u>				
Total FIT	84	79	86	94
FIT – benefit package	30	28	23	46
FIT – no package	54	52	62	46
Total Group	16	21	14	6



9.4 Trip Characteristics

	Visited on Recent Canadian Trip			
	British Columbia (401) %	Alberta (281) %	Ontario (490) %	Atlantic (102) %
<u>Type of Accommodation</u>				
Mid-priced city hotel/motel	48	49	56	44
Resort hotel	30	39	13	17
Home of friend or relative	29	27	36	28
Luxury city hotel	24	25	24	27
Budget city hotel	14	13	16	13
Bed and breakfast	13	14	10	22
Cottage/cabin	9	10	6	9
On a cruise ship	11	10	3	10
Authentic wilderness lodge	4	5	1	2
Guest ranch	3	4	2	6
Camping	4	2	1	6
On a farm	2	2	1	4
Caravan/motor home	4	4	2	8
Other	6	7	5	5
<u>Trip Expenditure</u>				
Under £2,000	27	26	42	27
£2,000-<£4,000	28	29	32	24
£4,000-<£6,000	22	23	14	22
£6,000-<£8,000	14	11	7	17
£8,000+	10	11	6	11
Mean (£ UK Pound)	4,200	4,300	3,000	4,700
<u>Value for Money</u>				
Excellent value	44	44	39	41
Very good value	36	38	40	33
Good value	17	15	17	19
Fair value	2	3	3	7
Poor value	1	1	1	--
<u>Recommended to Others</u>				
Definitely will	65	66	54	49
Very likely	27	28	34	35
Somewhat likely	7	3	9	8
Not likely	1	3	3	7



9.4 Trip Characteristics

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(401) %	(281) %	(490) %	(102) %
<u>Purpose of Trip – All</u>				
To see new places	61	58	56	62
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	79	82	68	65
To relax, unwind and decompress	40	40	35	34
To experience local culture	42	42	41	49
To visit friends and relatives	42	42	54	39
To go shopping	24	21	33	25
To visit historic sites, museums, or galleries	36	39	38	43
To interact with the local people	32	33	32	41
For entertainment and nightlife	16	12	18	24
To be together as a family	21	22	24	24
Low rates, good deals, and discounts	15	15	15	19
To realize a long term dream	30	34	24	29
To visit protected areas, including nature reserve, regional or national parks	47	55	32	42
To experience big cities in another county	23	21	29	27
To see and watch wildlife	44	49	23	39
To attend festivals and/or events	10	12	12	13
To participate in outdoor activities	21	24	10	19
Honeymoon	6	8	4	16
A trip that combined business with pleasure	6	5	7	13
To visit a spa, health centre, or hot springs	8	11	5	14
To view aboriginal sites and events	11	12	7	14
To go downhill skiing or snowboarding	12	14	5	10
Other reason	4	6	5	5

Source: Quantitative survey Q.8b, 9a, 10, 11, 16, 18, 19b-d¹

¹ Q.8b **(IF CANADA IN Q. 8a) ASK)** While you were in Canada on that trip, which of the following places did you visit, if any?

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

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

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

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

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

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

Q.19c Overall, how would you rate that trip on value for money – excellent, very good, good, fair, poor value for money?

Q.19d How likely are you to recommend that destination to others?

*Less than 0.5%



9.5 Activities Participated In

The activity pattern for all regions is remarkably similar. In part this is due to the fact that the activity question is a trip based one – not a province specific one – and there is plenty of multiple province visiting.

However, the more relevant fact is that the British are essentially looking for the same fundamental product in all regions of the country.

- Seeing the region's unique natural beauty.
- Visiting places of historical interest.
- Spending time in smaller towns and getting to know the local inhabitants.

The VFR factor cannot be ignored. Between 50% and 59% visited with friends or relatives and those, of course, provide a conduit to get closer to the Canadian life style.

The unique natural features of each region came through as important attractions—mountains in BC and Alberta, glaciers in the latter, the coastline of Atlantic Canada and the urban benefits of Ontario.



9.5 Activities Participated In

EXHIBIT SECTION 9-5: ACTIVITIES PARTICIPATED IN — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip			
	British	Alberta	Ontario	Atlantic
	Columbia (401) %	(281) %	(490) %	(102) %
Activities Participated In				
Visiting places of historical interest	69	68	73	67
Seeing beautiful beaches and coastlines	56	49	36	61
Fine dining	60	61	59	51
Visiting small towns	74	80	69	67
Sunbathing or other beach activities	19	18	21	32
Getting to know the local inhabitants	51	49	54	58
Seeing old architecture	52	55	54	59
Taking city tours	64	61	64	66
Observing wildlife in their natural environment	74	81	46	62
Visiting museums or art galleries	55	54	55	57
Viewing rivers or waterfalls	83	86	81	73
Attending theatres, clubs or shows	36	31	42	43
Viewing mountains	88	91	48	72
Visiting friends or relatives	50	50	59	57
Visiting wilderness areas	70	76	41	61
Seeing modern architecture	47	44	50	49
Visiting world heritage sites	48	53	47	47
Staying at a luxury resort	24	26	15	26
Taking nature tours	48	53	31	41
Attending festivals or fairs	29	27	30	34
Trekking in a nature area	43	44	25	44
Aboriginal cultural experiences, celebrations, and attractions	28	28	21	26
Visiting a spa	22	23	15	26
Visiting casinos	11	12	17	24
Taking a cruise	26	24	15	32



9.5 Activities Participated In

	Visited on Recent Canadian Trip			
	British	Alberta	Ontario	Atlantic
	Columbia (401) %	(281) %	(490) %	(102) %
<u>Activities Participated In</u>				
Taking a garden or flower tour	31	32	17	26
Canoeing/kayaking/boating	21	23	15	26
Taking wine/culinary tour	16	14	17	24
Taking a rail tour	30	32	19	34
Attending professional sporting events	17	18	19	32
Whale watching	36	33	12	37
Visiting hotspots	27	35	12	20
Viewing autumn leaves	21	25	28	38
Camping in a natural setting	17	15	10	30
Cycling	16	17	10	22
Viewing glaciers	48	61	15	23
Trail riding on horseback	12	13	8	18
Golfing	8	9	7	16
Sport fishing	11	7	8	26
Attending rodeos	10	14	5	14
Viewing Aurora Borealis (Northern Lights)	11	12	8	20
Downhill skiing or snowboarding	14	16	6	19
Hunting	6	6	4	18
Heli/cat skiing	6	7	4	16
Dog sledding	8	10	4	18

Source: Quantitative Survey Q.19a¹

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



9.6 Travel Party

For each region, group travel is 20% or less.

Typical travel parties include:

- Spouses/significant others (57% to 67%)
- Adults only (82% to 86%)
- More than one person (80% to 86%)



9.6 Travel Party

EXHIBIT SECTION 9-6: TRAVEL PARTY — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CANADIAN TRIPS

	<u>Visited on Recent Canadian Trip</u>			
	<u>British</u>	<u>Alberta</u>	<u>Ontario</u>	<u>Atlantic</u>
	<u>Columbia</u> (401) %	(281) %	(490) %	(102) %
<u>FIT vs. Group</u>				
Immediate party only	84	79	86	94
Part of larger group	16	21	14	6
<u>Party Composition</u>				
Spouse/significant other	67	67	61	57
Children	16	17	18	14
Travelled alone	14	14	14	20
Friends	14	13	13	17
Other relatives	9	8	10	8
Parents	7	6	7	8
Organized group/club	3	4	3	4
Business associates/colleagues	1	1	2	2

Source: Quantitative survey Q.12, 16¹

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

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



9.7 Trip Planning

British Columbia

- Friends and relatives are prime sources of inspiration to travel to Canada and to include British Columbia.
- The internet, used more for planning purposes, is a source of inspiration for only 19%.
- The lead time is longer than for other provinces:
 - 42.3 weeks planning in advance
 - 21.0 weeks booking in advance
- Only half book through an agent. Direct to airline is high--at 45% and hotel at 24%.
- Use of the online channel for booking purposes, regardless of the retailer, is as high as 85%. Clearly, the British are very comfortable with the internet for transactions.

Alberta

- As with B.C., friends and relatives are prime sources of inspiration to travel to Canada and to include British Columbia.
- The internet, used more for planning, is a source of inspiration again for only 18%.
- The planning lead time is shorter than for BC, but not the booking:
 - 36.3 weeks planning in advance
 - 22.5 weeks booking in advance
- Online use for booking is a high 78%.



9.7 Trip Planning

Ontario

- The sources of inspiration are similar to those of Western Canada visitors – friends, relatives very dominant.
- Internet as an influencer is at only 17%. The average planning lead time is relatively short – 29.3 weeks.
- Only a minority book through agents (43%) – the rest direct.
- Online use for booking is at 86%.

Atlantic Canada

- Visitors are more inspired by published stories and television shows, suggesting that Atlantic Canada has seen some inspirational publicity in Britain recently. However, the inspiration driven by friends or relatives still leads.
- The majority are booking direct to airlines (57%) and/or hotels (35%). Agents handle only 40% of bookings.
- Promotion of direct flights into Halifax by carriers may be a factor driving direct bookings.



9.7 Trip Planning

EXHIBIT SECTION 9-7: TRIP PLANNING — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CAR TRIP

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlanta
	(401) %	(281) %	(490) %	(102) %
All Source of Inspiration for Trip Planning				
Friend or relative	57	55	59	52
The internet	19	18	17	24
Destination travel guide	17	19	12	21
Television travel shows	11	13	10	20
Travel agent/tour operator	10	11	7	10
Saw a film on destination	8	9	6	12
Story in magazine or newspaper	10	10	7	13
Business reasons	5	5	6	12
Other television show	5	6	4	13
Direct mail or email advertising	4	5	3	13
Consumer travel trade show	4	4	3	8
A news story	5	4	3	9
Celebrity travelled there	3	4	2	10
Planning Horizons				
Average # of weeks	42.3	36.3	29.3	37.9
Booking Horizons				
Average # of weeks	21.0	22.5	18.5	20.8
How Trip Was Booked				
Booked through a travel agent/package provider (net)	<u>51</u>	<u>56</u>	<u>43</u>	<u>40</u>
In person	27	27	22	27
Online	14	15	12	7
Via phone	14	17	11	14
Airline (net)	<u>45</u>	<u>41</u>	<u>49</u>	<u>57</u>
Via their website	41	36	42	49
Via phone, email or in person	7	7	9	14
Hotel (net)	<u>24</u>	<u>21</u>	<u>23</u>	<u>35</u>
Via their website	21	20	21	31
Via phone	7	5	5	9
Other online travel supplier	9	8	11	7
Other	5	6	4	3
Total Online	85	78	86	93

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

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

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

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

Q.15c How did you book that trip?



9.8 Traveller Profile

- The profiles of visitors to each region have many similarities:
 - Slight skew to females
 - Over half have close connections in Canada
 - Usually married/living together
 - Employed and well educated
 - Incomes over £25,000 annually
- Differences tend to relate to age:
 - Visitors to BC and Alberta often age 50+ with one in four retired
 - Ontario and Atlantic Canada attracting younger travelers (often under 40).



9.8 Traveller Profile

EXHIBIT SECTION 9-8: PROFILE OF THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIPS

	<u>Visited on Recent Canadian Trip</u>			
	<u>British</u>	<u>Alberta</u>	<u>Ontario</u>	<u>Atlantic</u>
	<u>Columbia</u> (401) %	(281) %	(490) %	(102) %
<u>Age</u>				
18-29	17	16	20	25
30-39	24	20	25	28
40-49	15	15	18	20
50-59	23	27	20	13
60+	21	23	17	15
<u>Gender</u>				
Male	47	46	43	52
Female	53	54	57	48
<u>City</u>				
South East	24	21	21	29
Greater London	16	15	13	21
South West	9	11	8	7
North West/Merseyside	8	7	9	4
Scotland	10	11	16	9
West Midlands	6	6	6	9
Yorkshire/Humberside	6	7	6	8
East Midlands	6	9	9	7
North East	6	4	4	2
Wales	6	6	5	3
Eastern	4	5	3	2
<u>Close Friends/Relatives in Canada</u>				
Yes	54	55	62	57
No	46	45	38	43
<u>Marital Status</u>				
Married/living with someone	78	79	71	80
Single	14	12	20	16
Divorced/widowed/separated	7	8	8	4
<u>Household Composition</u>				
Adults only	71	70	67	58
With children < 18	29	30	33	42



9.8 Traveller Profile

	Visited on Recent Canadian Trip			
	British Columbia (401) %	Alberta (281) %	Ontario (490) %	Atlantic (102) %
<u>Occupation</u>				
Total employed	63	61	63	69
Senior unskilled manual worker	2	2	3	4
Skilled manual worker	5	7	4	10
Supervisory or clerical/junior managerial/professional/administrative	18	17	20	19
Intermediate managerial / professional /administrative	19	18	22	23
Higher managerial / professional/ administrative	10	10	7	8
Self employed	6	5	5	3
Employed part time	4	3	3	2
Student	6	5	7	8
Housewife/husband	3	5	6	4
Retired/semi –retired	23	25	18	16
Other	1	1	2	1
<u>Education</u>				
Less than secondary/secondary school	17	17	16	18
A levels/AS levels/Scottish Highers/GNVQ/BTEC	25	28	31	23
Undergraduate degree or equivalent	31	32	33	38
Post graduate degree or equivalent	24	20	16	19
<u>Household Income (annual gross £)</u>				
Under £20,000	12	12	14	12
£20,000 - <£25,000	8	8	8	5
£25,000 - <£30,000	11	11	11	11
£30,000 - <£40,000	16	17	16	14
£40,000 - <£50,000	11	13	13	10
£50,000+	22	23	21	30

Source: Quantitative Survey Q.1,2,3a,28-34 (basic data)

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

<£20,000 = <\$40,998 CAD

£20,000 - <£25,000 = \$40,998 - <\$51,248 CAD

£25,000 - <£30,000 = \$51,248 - <\$61,497 CAD

£30,000 - <£40,000 = \$61,497 - <\$81,996 CAD

£40,000 - <£50,000 = \$81,996 - <\$102,495 CAD

£50,000+ = \$102,495+ CAD



Section 10: Claimed Barriers to Canada Travel



10.1 Major Barriers to Canada Travel

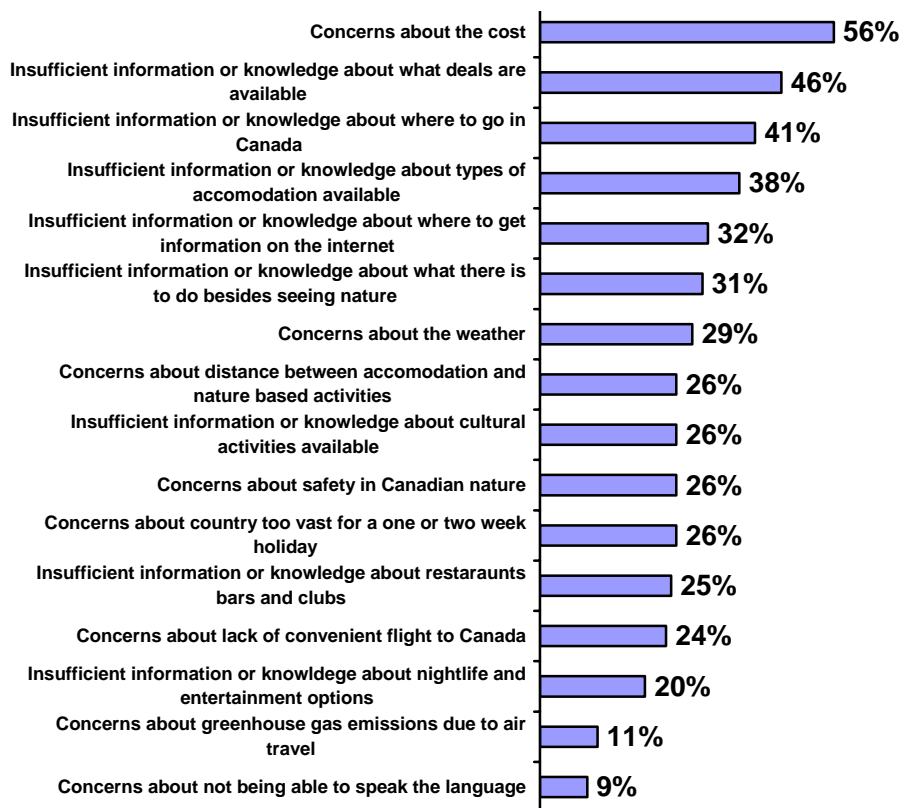
Concern about cost predictably surfaces as the top reason for procrastinating on a trip to Canada. Second, and related, is a desire for travel deals and not finding relevant ones.

Many of the other chief concerns are also about the need for information—where to go, accommodation available, where to get information on the internet and what else there is to do beyond nature viewing.

EXHIBIT SECTION 10-1: MAJOR BARRIERS TO CANADA TRAVEL

Among Those Not Likely to Visit Canada in Next 12 Months

Extremely/Very Important Barriers*



Source: Quantitative Survey Q. 26¹

¹ Base=n=1,576

Q.26 Some people are very interested in visiting Canada, yet have decided to put the trip off to a later year. From your personal point of view, how important are each of the following factors, if at all, in **preventing you from travelling to Canada in the next 12 months?**

* The list of potential barriers was derived from the focus groups. The question uses a scale approach to measure the magnitude of each of the prospective barriers.



Section 11: Media



11.1 Source of Inspiration

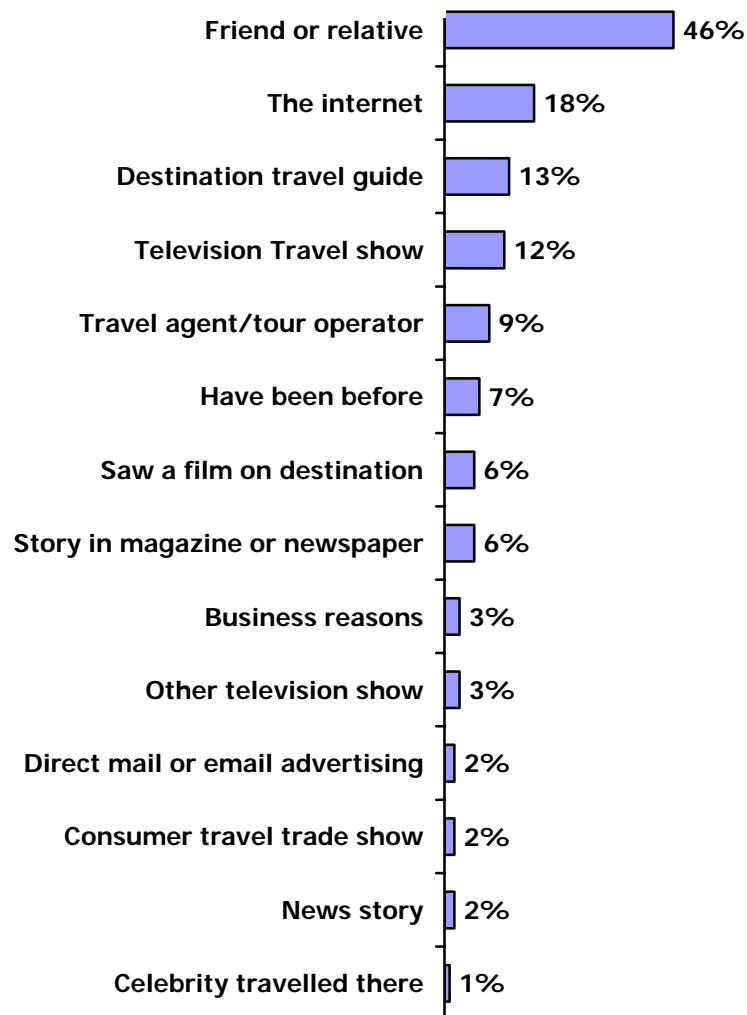
Friends and relatives are the principle source of inspiration for choosing a destination.

The internet and travel guides (which typically provide planning information including itinerary ideas) round out the top three.

EXHIBIT SECTION 11-1: ALL SOURCE OF INSPIRATION — BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers

All Source of Inspiration



Source: Quantitative Survey Q.14a¹

¹ Base=n=2,232

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



11.2 Source of Inspiration – by Destination

For trips to Canada, friends and relatives are unquestionably the dominant source of inspiration for UK travelers (as many as 57%).

The internet is second, but far behind in comparison (15%).

Friends are a major source of inspiration for other destinations as well—especially Australia. As discussed in the focus group findings, the British are highly social and to visit friends or listen to the advice of local friends upon returning is a natural path.

EXHIBIT SECTION 1 1-2: ALL SOURCE OF INSPIRATION – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>Source of Inspiration - All</u>				
Friend or relative	45	64	48	57
The internet	19	12	20	15
Destination travel guide	16	13	12	12
Television travel shows	13	12	11	8
Travel agent/tour operator	10	6	7	7
Have been before	5	--	7	4
Saw a film on destination	8	6	7	6
Story in magazine or newspaper	7	7	6	6
Business reasons	6	3	3	5
Other television show	4	4	4	3
Direct mail or email advertising	2	2	2	2
Consumer travel trade show	3	4	1	2
News story	4	1	1	2
Celebrity travelled there	3	5	1	1

Source: Quantitative Survey Q.14a

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



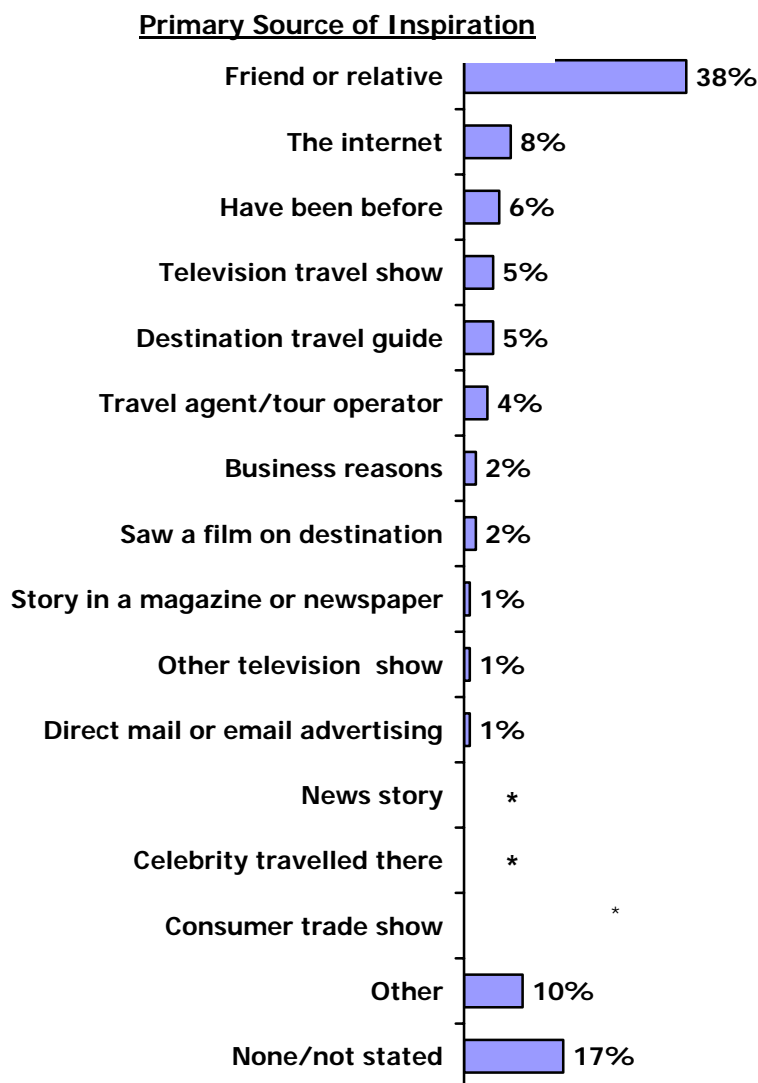
11.3 Primary Source of Inspiration

Further proof of the influence of friends/relatives--they are by far the dominant influencer for long-haul travel. Only 9% mentioned the internet, 5% travel television shows.

In 1997, as many as 73% of travel agents claimed that they were influenced in the specific destination chosen. However, here only 4% travellers cite them as a source of destination inspiration. Clearly, the source of influence has changed.

EXHIBIT SECTION 1 1-3: PRIMARY SOURCE OF INSPIRATION — BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.14b¹

¹ Base=n=2,232



11.4 Primary Source of Inspiration – by Destination

With Canada, friends and relatives far outweigh other sources of inspiration.

EXHIBIT SECTION 1 1-4: PRIMARY SOURCE OF INSPIRATION – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia	Australia	U.S.	Canada
	(382) %	(165) %	(832) %	(884) %
<u>Primary Source of Inspiration</u>				
Friend or relative	37	53	40	49
The internet	9	4	8	5
Have been before	5	--	7	3
Television travel shows	5	7	5	4
Destination travel guide	7	4	4	5
Travel agent/tour operator	2	*	3	3
Business reasons	4	2	1	3
Saw a film on destination	3	1	2	2
Story in magazine or newspaper	2	1	1	2
Other television show	1	1	1	1
Direct mail or email advertising	1	1	1	*
News story	1	--	--	1
Celebrity travelled there	1	1	*	*
Consumer travel trade show	*	--	*	*
Other	10	10	10	10
None/not stated	14	16	16	13

Source: Quantitative Survey Q.14b

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

*Less than 0.5%



11.5 Specific Sources Used for Trip Decision

Among the few who mentioned that television travel programming was influential, BBC Holiday, followed by Sky Travel, was the most often cited.

EXHIBIT SECTION 1 1-5: SPECIFIC TV TRAVEL SHOW AND OTHER TV SHOWS USED

Percent Among Travellers Using Each Medium

<u>Television Travel Shows (n=237)</u>		<u>Other Television Shows Used (n=57)*</u>	
<u>Major Mentions</u>	<u>%</u>	<u>Major Mentions</u>	<u>%</u>
BBC Holiday/Holiday	27	Sex and the City	13
Sky Travel/Sky Travel Shop	19	Wildlife/Nature programs (non-specific)	11
Wish You Were Here	10	BBC Holiday/Holiday	11
Travel programs/shows (non-specific)	4	Travel programs/shows (non-specific)	10
BBC Mentions (non-specific)	3	Friends	8
BBC Travel	3	Other TV shows/dramas	6
Various shows	3	Discovery Channel	6
Thompson Travel	3	Sky Travel/Sky Travel Shop	4
Thomas Cook	2	Movie mentions	3
Wildlife/Nature programs	2	Lonely Planet/Planet	3
		Pole to Pole	3
		Around the World in 80 Days	3

Source: Quantitative Survey Q.14 c, d

* Caution small base size

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

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



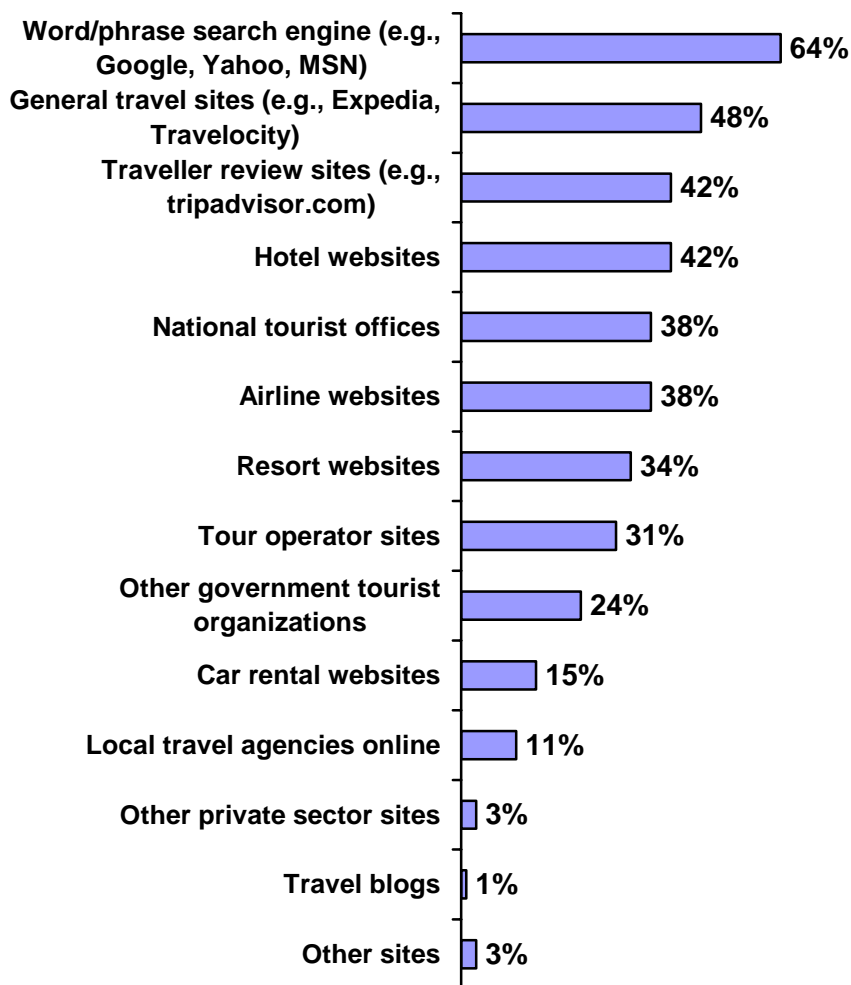
11.6 Specific Websites Used for Trip Decision

Popular word search sites are the main gateways to travel information (to 64%).

General travel sites (48%), traveler review sites (42%), hotel sites were next, followed by national tourist offices (38%).

EXHIBIT SECTION 1 1-6: SPECIFIC WEBSITES USED

Percent Among Travellers Using Internet



Source: Quantitative Survey Q.14e¹

¹ Base=n=385

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



Section 12: Trip Planning



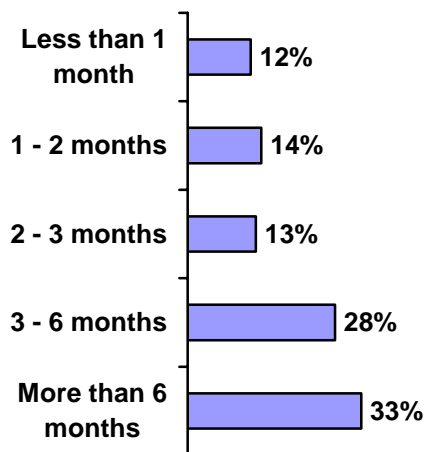
12.1 Trip Planning/Booking Leadtime

The British plan their trips 8 months in advance, booking them relatively early--5 months in advance.

EXHIBIT SECTION 12-1: TRIP PLANNING/BOOKING LEADTIME — BY ALL DESTINATIONS

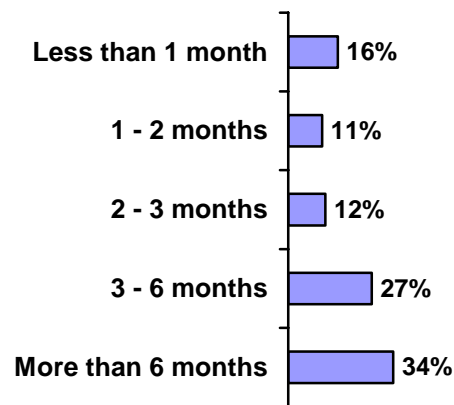
Percent Among Past 3 Year Travellers

Planning Leadtime



Average # of weeks 30.6

Booking Leadtime



Average # of weeks 18.7

Source: Quantitative Survey: Q. 15a,b¹

¹ Base=n=2,232

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

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



12.2 Trip Planning/Booking Leadtime – by Destination

Planning and booking lead times are quite typical for Canada—again, booking very early relative to France and Germany.

EXHIBIT SECTION 12-2: TRIP PLANNING/BOOKING LEADTIME — BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (382) %	Australia (165) %	U.S. (832) %	Canada (884) %
<u>Planning Leadtime</u>				
Less than 1 month	17	11	7	9
1 – 2 months	16	9	13	11
2 – 3 months	13	14	13	12
3 – 6 months	25	26	31	32
More than 6 months	30	42	36	36
<u>Average # of Weeks</u>	31.1	32.7	31.4	34.4
<u>Booking leadtime</u>				
Less than 1 month	23	15	13	12
1 – 2 months	11	6	11	10
2 – 3 months	14	12	11	12
3 – 6 months	23	35	26	29
More than 6 months	28	32	39	37
<u>Average # of Weeks</u>	17.6	17.3	20.1	19.6

Source: Quantitative Survey Q.15a,b

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

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

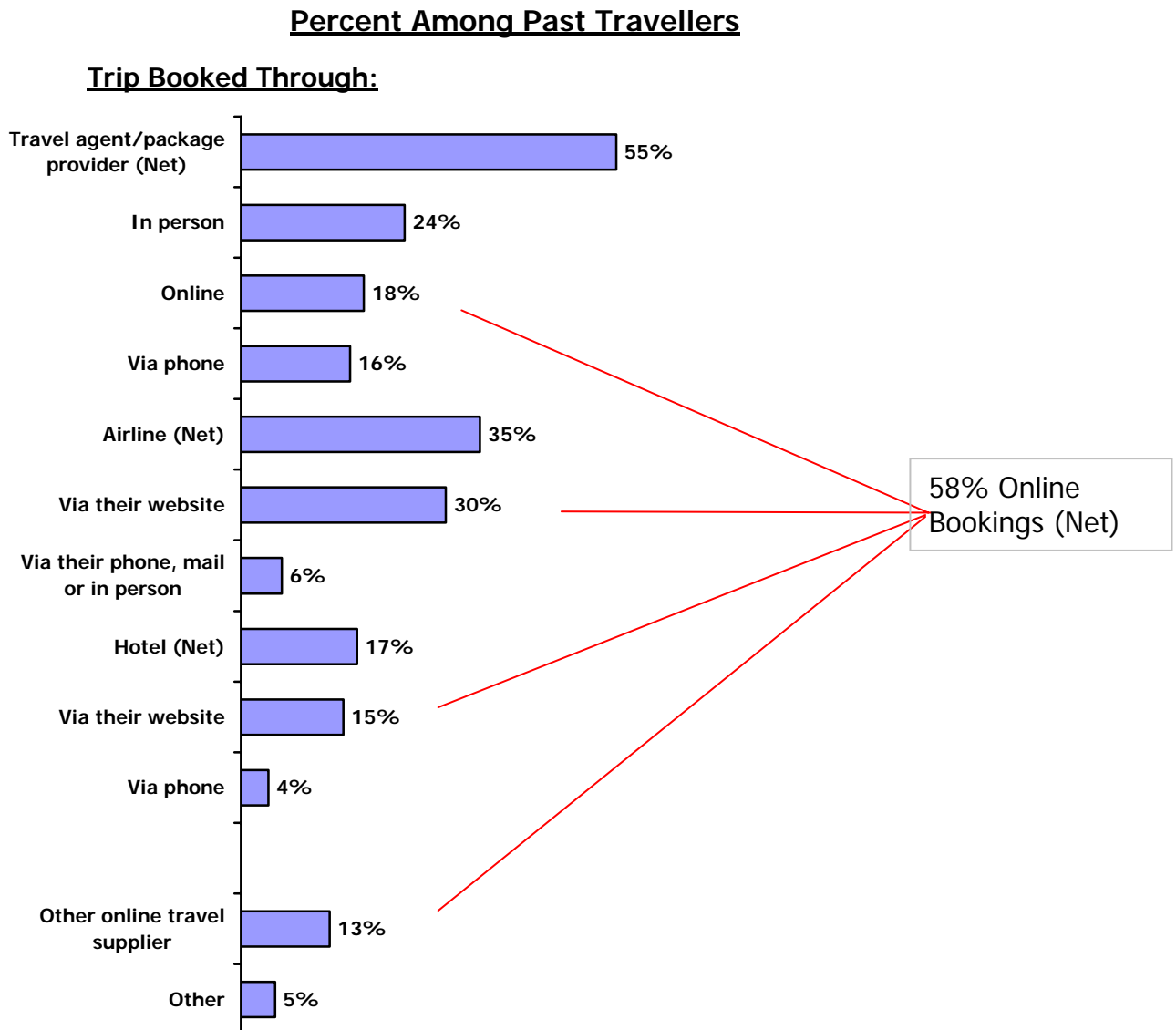


12.3 How Trip Was Booked

Just over half book their long-haul trips through a travel agent. It is very common to go direct to the airline (35%) and/or to an hotel site (17%) for booking.

The traditional in person visit to a travel agent has fallen to only 24%.

EXHIBIT SECTION 12-3: HOW TRIP WAS BOOKED – BY ALL DESTINATIONS



Source: Quantitative Survey Q.15c¹

¹ Base=n=2,232



12.4 How Trip Was Booked – by Destination

With travel to Canada, booking direct to an airline (47%) is actually more common today than using a travel agent (44%).

Regardless of who the ticket seller is, as much as 63% of transactions are done online in Canada's case.

EXHIBIT SECTION 12-4: HOW TRIP WAS BOOKED – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia	Australia	U.S.	Canada
	(382)	(165)	(832)	(884)
	%	%	%	%
<u>Trip Booked Through:</u>				
<u>Travel agent/package provider (net)</u>	<u>57</u>	<u>64</u>	<u>49</u>	<u>44</u>
In person	22	33	22	21
Online	15	16	18	13
Via phone	22	22	12	12
<u>Airline (net)</u>	<u>34</u>	<u>32</u>	<u>41</u>	<u>47</u>
Via their website	27	26	37	42
Via phone, email or in person	8	8	6	7
<u>Hotel (net)</u>	<u>19</u>	<u>21</u>	<u>21</u>	<u>23</u>
Via their website	16	17	18	21
Via phone	5	6	5	5
Other online travel supplier	13	18	13	9
Other	4	1	5	6
<u>Online Bookings (net)</u>	<u>56</u>	<u>55</u>	<u>64</u>	<u>63</u>

Source: Quantitative Survey Q.15c

Q.15c How did you book that trip?

Q.15c How did you book that trip?



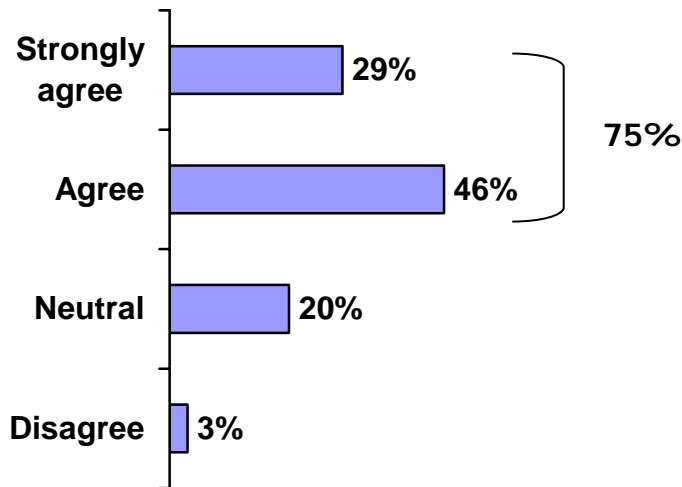
Section 13: Environmentally Responsible Destination



13.1 Long-Haul Traveller's Environmental Involvement

The vast majority of Brits claim to try to reduce the impact they have on the environment on a daily basis (75%).

EXHIBIT SECTION 13-1: LONG-HAUL TRAVELLER'S ENVIRONMENTAL INVOLVEMENT



Source: Quantitative Survey Q.27a¹

¹ Base=Past/future travellers n=2,697

Q.27a To what extent do you agree or disagree with the following statement?

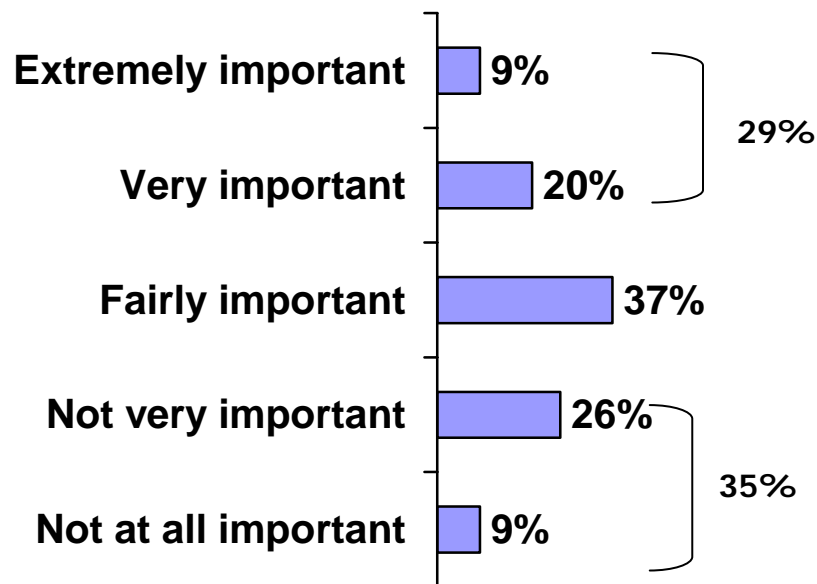
It is very important to me that I take action on a daily basis to reduce my impact on the environment by adopting environmentally-friendly measures such as recycling, conserving water.



13.2 Importance of Destination's Record on Environment

However, while most make a personal effort to reduce their impact, only 29% claim that their concern is enough to influence their choice of destination based on its environmental record—quite a low level.

EXHIBIT SECTION 13-2: IMPORTANCE OF DESTINATION'S RECORD ON ENVIRONMENT WHEN CHOOSING TRAVEL DESTINATION



Source: Quantitative survey Q.27b¹

¹ Base=Past/future traveller n=2,697

Q. 27b Thinking about the environment, some countries are making considerable effort to be more environmentally responsible, while other countries are much slower to react. When choosing a travel destination, how important to you is a destination's record on the treatment of its environment?

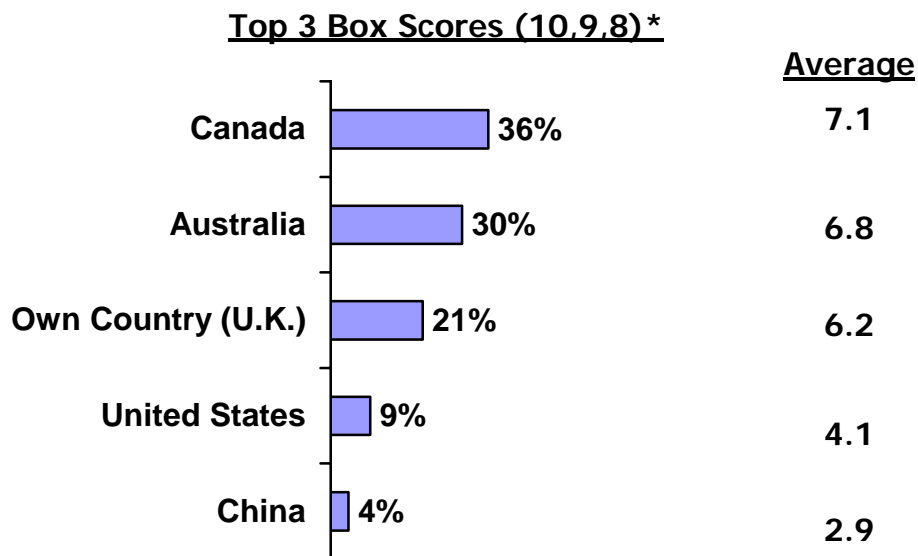


13.3 Destination Rating on Being Environmentally Responsible

The British believe that their own nation has a fairly poor record in terms of environmental responsibility.

Among four offshore destinations evaluated, Canada emerges as having the best reputation, ahead of Australia, with the U.S. and China trailing badly.

EXHIBIT SECTION 13-3: DESTINATION RATING ON BEING ENVIRONMENTALLY RESPONSIBLE



Source: Quantitative Survey Q. 27c¹

¹ Base=Past/future travellers n=2,697

27c How would you rate the following countries as an environmentally responsible destination? Using a scale of 1 to 10 where “10” means extremely good and “1” means extremely poor, or any number in between.

*Rating on a 10 pt. scale. 10 means extremely good and 1 means extremely poor.



Section 14: Consumer Product Idea Forums



14.1 Introduction—Online Forums

This section reports on a qualitative study conducted online amongst tourists from the United Kingdom 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 study were to formulate hypotheses bearing on the following issues:-

- Hope and expectations of tourists coming over to Canada from the UK
- 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 from the UK.



14.2 Canada as a Destination: General Observations

Canada rates highly as a “dream” destination, poorly as a planned destination, and rarely as an extended “city visit” destination. The primary conversion method for the UK tourists has been visiting friends and relatives (VFR) and/or strong recommendations by friends.

The key, for Canada, is shifting it from a “dream” destination to a reality destination. While the current major conversion factor is VFR, the introduction of “cheap” fares to Canada, and the increased frequency of flights and increase in Canadian destinations brought around when the new Open Skies agreement is signed should help.

Certain specific destinations in Canada are iconic for the UK

- Vancouver
- Whistler
- Rocky Mountains
- Niagara Falls
- Toronto.

General knowledge of Canada, even amongst previous visitors, is poor – especially in terms of the size of the country and travel distances.

Barriers identified are the same as those in the focus groups. NB: these barriers all involve the need for reassurance of “comfort”-- not in the sense of “luxury” but, rather, in the sense of feeling comfortable, safe and not bored with what they will do.



14.3 U.K. Stereotype Perceptions Of Canada

There are a number of stereotypical perceptions of Canada held by UK respondents, each of which holds advantages and disadvantages for the development of new products.

Clean; Friendly; Polite; Vast:

In general, Canada (and Canadians) are seen in a positive light and are considered more “civilized” than Americans – an attribute that extends to our cities.

The streets were “Very, Very clean” in comparison to the streets of London. The store assistants were very friendly and helpful but it seemed more like they were happy to help with what I wanted rather making me like I was troubling them.

Vancouver is slicker and much glitzier than Portland. it's super clean (i know Portland is too but..) and doesn't feel as crowded even though I'm sure it's a bigger city (not sure how they manage that one)

People were very friendly, it was clean and service was good. Standard of food was quite good too.

I often go to America because I have family there. Americans are brash and arrogant. The saying “have a nice day” sums them up (I hope there are no Americans doing this market research) they don't care what sort of day you have. The Canadians are different they seem to care. They are more polite, they give you time and are very friendly.

Although the web site is very informative and easy to use, I have my concerns in that the distances and areas do not compare with the UK. Canada is a vast country I believe that the UK could fit into British Columbia alone. I would need to call on professional advice to tell me what is and is not feasible.

All of these perceptions mean that Canada and Canadians “mesh” better with UK residents than Americans do, and our products need to highlight this difference in both overt and subtle ways. At the same time, the UK respondents were, for the most part, completely mentally unprepared for the size of Canada, and this is reflected in a number of their concerns.



14.3 U.K. Stereotype Perceptions Of Canada

Canada: a “winter nation”

The problems with the image of Canada as a winter nation are discussed somewhat in the section on Ontario, but this respondent's comment is worth repeating.

Canada would greatly benefit if they advertised their warm summers in a similar fashion to Florida by showing people in summer wear, drinking popular Canadian beers in bars (and not hidden by a brown paper bag), sitting outside restaurants having drinks and showing some hip trendy spots.

The current CTC campaign of Canada, Keep Exploring, highlights the diversity of activities and tourism products available in Canada quite well and is, on the whole, an excellent, year-round theme. But, as this and other respondents noted, we don't really combat the icon of Canada as a winter nation; an icon that operates at the level of a cultural sub-conscious. Indeed, our current advertising of ski products reinforces this image to some degree to the potential detriment of our summer based products.

Possibly, the simplest way to overcome this problem, while retaining the advantages of the winter nation icon, is to create a series of “double-binds” such as “ski in the morning, sun bath in the afternoon”.¹ Other examples could include the use of extreme stereotypes from the sub-conscious culture being presented and “refuted” such as black and white film of dog sleds in winter with a flash forward to people relaxing on a summer day at a trendy spot saying “glad we don't live like that anymore”.²

¹ The term “double-bind” was coined by Gregory Bateson and refers to bringing opposite views of the “same” thing into consciousness at the same time. Handled well, the presentation of a double-bind allows for the message that conveys the double-bind to include the desired solution.

² These are merely crude examples of double-binds.



14.4 Experiences of Canada

The following accounts of visits to Canada are fairly typical.

These accounts tend to highlight the iconic nature of many UK visits to Canada.

- i) Flew to New York then went on a cruise to see New England and Canada. We went to Halifax on the cruise.
On our return we flew to Niagara Falls (3 days), then drove to Toronto (3 Days). Flew back to New York (2 Days) then back to the UK.
- II) Flew to Vancouver (2 days), did a bit of shopping and experienced the nightlife.
Then flew and drove to Whitehorse, Dawson City and other areas in the Yukon Territory (7 days). Side trip to Skagway (3 days).
Returned to Vancouver (1 day) and flew home.

For many UK visitors, it was common to “dip into” the United States – either flying their originally or on side trips.



14.5 General Discussion of Tourism Products

The vast majority of UK travelers 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 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.



14.5 General Discussion of Tourism Products

The deployment of some type of geo-tagging system, whether it be using Google Maps Google Earth¹, 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.² 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".

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

² 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.



14.5 General Discussion of Tourism Products

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.

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.¹ 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 scepticism.² The optimal solution for tourism providers is to monitor key online communities and act as problem solvers and information sources.

¹ 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.

² "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.



14.6 Functional Product Areas for the UK Traveler

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

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 ski 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.



14.6 Functional Product Areas for the UK Traveler

On Wine

Many respondents from the UK know that Canada has a wine industry, but they are **not** aware of its placement or depth (they usually think of the Ontario VQA group in the Niagara region). Reactions to the development of the wine industry in BC, Nova Scotia and in Prince Edward Country (Ontario) suggest that there are opportunities for specialty wine tour products at a local / regional level that are co-branded by local wine growing associations and local tourism organizations and sold via word of mouth through the wine community in the UK.

During an on again, off again discussion of the PEC wineries, one respondent asked if they (PEC wines) were available in the UK because they would like to try them. Later on, the respondent said that they would probably hit the County to see the wineries. This is a fairly standard process amongst wine aficionados – taste a wine and, if good and relatively unknown in their area, go to the vineyard and purchase several cases. Why this is important is that a) it creates “bragging rights” for the person who does it, and b) they then act as a local source of information to their peers (i.e. a “friend referral”).



14.7 Barriers and Options

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”.

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.¹

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...

¹ 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.



14.7 Barriers and Options

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.

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.



14.8 British Columbia

British Columbia is one of the best known 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^[1] 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.

¹ These "problems" appear to have been at the respondents' end.



14.8 British Columbia

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.



14.8 British Columbia

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,¹ even though there is a Hiking page available on the site.² We would recommend that it also be listed on the Natural Sights, Parks & Wildlife page.

¹ <http://www.hellobc.com/en-CA/SightsActivitiesEvents/NaturalSightsParksWildlife/BritishColumbia.htm>

² <http://www.hellobc.com/en-CA/SightsActivitiesEvents/AirLandActivities/Hiking/BritishColumbia.htm?Lev1=1>



14.8 British Columbia

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.



14.9 Alberta

Alberta or, rather, the Calgary - Banff - Jasper corridor, is often conflated with British Columbia. In many ways, the perception of Alberta is similar to that of BC, although the desirability of both Calgary and Edmonton is lower than that of Vancouver. We certainly saw similar aspects in regard to "Civilized Nature" as we did with BC from the respondents.

Unlike BC, however, the UK traveler had a distinct concern that was apparent on the part of the respondents towards "commercialization". As one respondent noted

My main concern from a brief look at a website is possible commercialism. It all sounds a bit too good to be true. Here in UK we stay on working farms up and down the country. The kids like to help out if they are allowed but mostly we don't stay where the farm lays on activities or 'entertainment' itself. I'm tempted to 'experience' a farm in Alberta but wondering if it would be a bit made up. Another example, steam train rides - my son loves them and we've got into it now too but when looking at the website it seemed a bit contrived.

The issue of commercialization is an important one, since it strikes at one of the core perceptions of Canada as being "authentic":

The reason we love Canada is because it is beautiful, safe and peaceful. This is what gives us pleasure. It is not commercialized.

"Commercialization" is, generally, viewed as a property of the United States, and the lack of it is seen as a major differentiator with the U.S. (along with "safe", "clean" and "polite").

The concern over commercialization – "a bit contrived" – probably refers to the way the language is used, the "Wild West thing" as one respondent put it and, definitely, ties in with the "unreality" of a 20,000 acre farm for the British. Symbolically, this combination is more likely to evoke American images than Canadian images in the minds of UK respondents and, hence, raise concerns about "commercialization".



14.9 Alberta

Product Discussion

Alberta has several iconic status destinations: Banff - Lake Louise, Jasper and, to a lesser extent, Calgary (it is known, but not appreciated). The West Edmonton mall is not, for the UK traveler, an icon but, rather, not something to be "pushed"

The Cultural City of Canada 07 interested me about Edmonton but I found the website pretty cheesy. The most frequently asked was about the mall it seemed. Not so cultural.

As with British Columbia, the problem lies not so much with the existing products, but with the knowledge of these products amongst UK respondents. In particular, no additional work is required for the Banff – Lake Louise corridor, although some additional excursions to surrounding areas may well be developed in keeping with the Civilized Nature concept. The idea would be to draw on the existing knowledge of the area and expand on it, and a geo-tagging solution may be the best option here.

In developing the "Wild West" theme, there are some excellent existing products, but these appear to be misunderstood by many UK respondents. First of all, the term "Wild West" (used by several respondents) is American, and that brings all sorts of unwanted symbolic associations for many UK respondents ("brash", "not polite", and "uncaring" are just some of the terms used). These are symbolic associations that should be avoided.

A second problem lies with the graphics in the Badlands site – it is way too "Cowboy" oriented, especially in areas where it should not be (i.e. the Natural History section). The UK has had a long history of "gentlemen explorers", and this is part of the tradition of both Canada and Alberta, but it is not brought out (or known) to our UK respondents. "Gentlemen explorers", such as Joseph Tyrrell, should be brought out in the natural history area.¹

The concept of "gentlemen explorers" could be harnessed into serving as the basis for a number of specialized tourism products and, given the general popularity of dinosaurs; this would probably be a good place to start the marketing.

¹ For a good, short (1 min) video, see <http://www.histori.ca/minutes/minute.do?id=10181>



14.9 Alberta

The concept of “farm/ranch vacations” also needs more explanation and context for UK respondents, lest it be thought of as a) American, and b) “commercial” (i.e. not “authentic”). Part of the difficulty for UK respondents lies in the sheer scale of Alberta “farms” as the following exchange illustrates

VSW: The farm idea appealed to me most. I would want to look into it more. I'm sure I and the family would enjoy a lot of what is going on there. No idea what 20,000 acres would feel like but if we got to learnt to ride whilst there we would try to check a few 50 say out!!

*MT: I remember meeting up with a character who grew up on a “small family farm” (as he put it!) of 23,000 acres. He used to talk about going to high school (5th and 6th form, I think, in the British system) where they would have rodeos instead of track and field. He also used to ride into school each day. I don't *think* that is still going on, but it certainly gave me a new outlook on what I had thought was commercialism there.*

VSW: Not sure I catch your drift properly - perhaps I'm not explaining myself very well... I certainly would be overwhelmed by 20,000+ acres... I did mean only 50 acres would seem HUGE to me!

While the British have a tradition of vacationing on “working farms”¹, these are, however, radically different from Albertan farms and ranches. In UK farm vacation marketing, these products are tied to “getting back to nature” and food (especially “fresh” and “organic”). Given that Canada markets “nature” in a totally different way, our marketing of farm/ranch vacations will appear more contrived; i.e. it goes against the UK cultural expectation. This can be counteracted, in part, by simple statements such as “We have a long tradition of...”, and by providing historical context.

¹ See <http://www.cartwheel.org.uk/> for an example of how this is marketed in the UK.



14.9 Alberta

Itineraries

The vast majority of itineraries suggested (over 95%) were combined Alberta-BC itineraries along the Calgary-Banff-Lake Louise-Vancouver corridor. The primary blockage is ignorance

The main Alberta site was cool and nicely laid out but should have had an overview of Alberta on the front page. If you're not that familiar with the country you need to check whether Alberta is a state or a city and what cities it contains. Never assume we know anything is the best place to start. Once in though it's got lots of info.

As noted earlier, ignorance amongst the target is one of the core problems in marketing to the UK. On the whole, they know next to nothing of our history, geography, politics or culture. While they perceive us as “friendly” and “polite”, they are intimidated by our size and, sub-consciously, by their own ignorance.

They are not, however, stupid and, if given an incentive, will certainly spend the time to do some research. In particular, they react very well to “Did you know that...?” type questions as a spur, and these types of questions can be used a) to entice them deeper into the Alberta web sites and b) to differentiate and disassociate the “cowboy” image from the American Wild West theme. In particular, it is important to get rid of the “Wild” modifier, which they tend to subconsciously associate with American, Lawless, uncivilized, etc., and replace it with “Civilized”.



14.10 Ontario

Ontario has two main iconic destinations: Toronto and Niagara Falls. These two tend to dominate the perceptions of European travelers. One of the most interesting findings is that for respondents who had **not** been to Canada before, Ontario was viewed primarily as a **summer** destination. While this perception plays out differently between all three countries in particulars, it is held in common amongst them all.

For UK participants, there is an awareness of Toronto as a clean, cosmopolitan city but, with the exception of the CN Tower, very little specific knowledge. Niagara Falls is also recognized by UK travelers as a “must see” site. Knowledge of other areas of the province is “spotty” and relies usually on word of mouth information and, to a lesser degree, on personal research.

The Niagara wine country is also recognized, probably due to the increased awareness of Ontario VQA wines in the UK, but this awareness is separated from knowledge of the geography. Initial reactions by participants to the Prince Edward County site showed that they had no awareness of it at all, although many expressed a lively interest in it after viewing the site.

Product Discussion

One fairly consistent comment was that Canada, and Ontario, do **not** market themselves as a summer destination and, given all the summer activities, this is a mistake.

I don't think Canada promotes their summers enough which makes people think that its winter all year around.

Well I can truly believe that comment about the British guys because not only that people who have never been think its winter all year round the Canadian brochures promote the same.

Canada would greatly benefit if they advertised their warm summers in a similar fashion to Florida by showing people in summer wear, drinking popular Canadian beers in bars (and not hidden by a brown paper bag), sitting outside restaurants having drinks and showing some hip trendy spots.



14.10 Ontario

Most of the respondents who had not been to Canada before perceived Ontario in a much more summer oriented mode, despite the visits to <http://www.bluemountain.ca/>. This suggests that marketing of Summer/Fall oriented products has a good potential with the UK public.

In particular, these products should be linked with existing icons such as Toronto, Niagara Falls, and the Niagara wine industry. In addition, there is ample interest in summer Nature visits / trips of both a nature viewing type, hiking tours and, to a lesser degree, nature "explorations".

This last category needs some expansion, since it conflates interest with Aboriginal tourism products with environmental issues and previous UK cultural icons of Canada such as Grey Owl. Put simply, the British have an older "myth" of Canada being closer to nature than the UK. This myth, which is pretty much in their cultural sub-conscious by now, still influences how they perceive our interactions with nature and evokes a longing in them to experience it for themselves. The archetype of this process was Grey Owl, a British man (Archie Belaney) who came to Canada and managed to pass for an Ojibwa, while publishing books and articles in the late 1920's and 1930's (d. 1938). He was portrayed by Pierce Brosnan in the 1999 film *Grey Owl*.

The interest in this type of nature tour product has not abated.

Now this really would interest the kids, exploring Chapleau Crown Game Preserve by CANOE and try to spot most of the animal habitat (we would probably stay here the longest, a few days). Our daughter loves Winnie the Pooh, so we would then have to drive to Pukaskwa National Park. Then off to more canoeing at Quetico Provincial Park, the kids would love it.

Head to Northern Ontario, to see the coast near Hudson Bay. Hopefully see polar bears, take a boat trip, stay in remote lodges / hotels in beautiful locations - i am intrigued by the place called Moose Factory, with an eco-tourism lodge called Cree Village - about as away from it all as you can get. You reach it by helicopter!



14.10 Ontario

As with other parts of Canada, the general perception is still one of “Civilized Nature”.

... one of the liveliest, upfront cities in Canada (Toronto) contrasted with remote stays in pristine wilderness.

At the same time, there is really no perception of the size of the country – one person casually suggested that a week long hike around Lake Superior would be enjoyable!

The question of distance is crucial for the UK respondents as is the question of safety. Many respondents talked about hiking tours but, with no real feel for the distances involved, grossly underestimated the time required. All who expressed an interest in hiking tours also expressed a very strong interest in hiking planners and information on equipment rentals.

Most people listed Toronto as their start point, followed by visits to Niagara Falls, “nature” (usually Northern Ontario or the central lakes district), and then back to Toronto, Ottawa or Montreal for their exit. A number of respondents expressed an interest in renting a car and just “touring” – seeing what was available and around. This suggests the possibility of marketing “touring” vacations (flight, 2-3 city visit, car rental) and the production of “road touring” guides.



14.10 Ontario

Consider the following example of an itinerary:

Flying to Toronto (Summer; 1 day)

Drive to Blue Mountain Resort (3 days)

- rock climbing
- lazing around the beach

Drive to the Sandbanks (3 days)

- wind surfing
- kayaking
- jet skiing
- scuba diving

Toronto (3 days)

- educational experiences
- Casa Loma
- CN Tower

Drive to Montreal (3 days)

- Tour (bus or walking) of Old Montreal
- Jean- Drapeau Park

Drive to Ottawa (5 days)

- Rideau Falls
- Parliament Hill
- The Market

Fly to London

A second opportunity in the “road touring” category is suggested from the positive reactions to the Prince Edward Country products – specifically, a road tour product specialized for the Toronto – Kingston - Ottawa corridor, going along the lake and St. Lawrence to Prescott or Cornwall.



14.10 Ontario

Fly to Toronto (3 days)

- Shopping
- CN Tower
- Shows

Drive to Niagara Falls (2 days)

- The Falls
- Niagara on the Lake
- Niagara wine region

Drive along Lake Ontario to Kingston (2-4 days)

- Prince Edward County
- The Sandbanks
- 1000 Islands

Drive to Ottawa (2-4 days)

- Parliament Hill
- Museums

Fly home

Other possible itineraries were more “nature” focused:

Fly to Toronto (2 days)

- CN tower
- restaurants, bars and nightlife

Drive to Niagara Falls 1-2 days)

Drive to Lake Superior Provincial Park (1 day)

Either

Drive/Fly to Northern Ontario, to see the coast near Hudson Bay.

- Polar bears
- Boat trip
- Stay in remote lodges / hotels (e.g. Moose Factory, with an eco-tourism lodge called Cree Village)

Or

Drive to the Agawa Canyon Tour train

Explore the Chapleau Crown Game Preserve by canoe

Drive to Pukaskwa National Park.

Drive to Quetico Provincial Park

(Canoeing, nature/animal watching at all)

Return to Toronto and fly out



14.11 Manitoba

In general, the reaction of respondents who had been to Canada was moderately positive but, as one noted,

I don't wish to be negative, but I feel that the truth is more valuable to you in these types of situations. I know very little about Manitoba and having checked out the websites provided, I didn't really find anything to tempt me to go. As per a lot of Canada it seems to be exceedingly beautiful but that seems to be about it and at this particular time in my life I can't see a situation where I'd use my valuable vacation time to go there. If I had several weeks or months to tour Canada, sure. But given that I have to work most of the year at the moment, it's kind of a no-go.

This negative attitude was almost universal amongst the respondents who hadn't already visited Canada.

I'm not the sort of tourist who wants 'educating' on my holidays - I can learn anytime - holidays are for fun! So anything that's a bit, sciency, or anthropological or historical is a complete turn off for me. I definitely don't want 'custom programmes', 'human rights museums', 'aboriginal festivals', 'bird reserves', etc. I'm not into clinical spas either, or provincial theatre - what a load of old tat all of that was.

The negative attitude seems to primarily stem from reactions to the websites, since the travelmanitoba.com site was listed as actually enhancing people's perception of Manitoba and their desire to go there (especially the Top Ten page). The differing reactions imply that which the official site may work, and work well, the specific sites counter the official message to some degree.

Product Discussion

Of Polar Bears

In general, most respondents were mediocre to the proposed polar bear trips for a variety of reasons (time, cost, ethics, etc.). Even where the response was positive, it was only for a limited trip (~3 days maximum), and the responses to the Via Rail bear trip bore this out. At best, the bears are a limited product that, because of the season, most travelers would prefer to see incorporated with ski or other winter vacations.

The bottom line is that polar bear excursions will be a niche product in the UK.



14.11 Manitoba

Of Whales

The response to whale watching was much more positive amongst respondents, even though, as one respondent noted:

Whale watching is not really the biggest deal any more, I've been to many places where you can go whale watching and I wouldn't really go somewhere just because you could whale watch, regardless of what it was packaged with...

It does, however, have an ad-on appeal to many respondents who were thinking of road trip / camping in Manitoba. The rail option was, in general, received poorly.

It is, however, interesting to note that the responses to **both** the bears and the whales were more positive amongst the respondents who had not previously been to Canada. This suggests that both have a “grab” factor to focus potential thoughts of a Manitoba vacation amongst UK travelers who have not been to Canada before hand.

General

While the main travelmanitoba.com site enhanced the view of respondents, one said it was “exactly what I was looking for”, the same was not true of the other sites listed. This implies that greater care is needed in integrating the web presentation of tourist products in Manitoba. Furthermore, the integrated message portrayed on the main site is being undercut by the other sites, presenting an overall image of “so what?”. As several respondents noted, talking about the other sites:

I have looked through the links that you have provided and to be honest there is not too much that grabs me or shouts out to me about Manitoba. Don't get me wrong it looks a beautiful place, but it's not as exciting as BC or Alberta.

It's the location and the site information is quite boring, unless your a naturalist.

It doesn't seem to grab me like the other provinces of Canada have.



14.11 Manitoba

Given the UK love of exploring culture and heritage, as well as “Civilized Nature”, and the absolute lack of an iconic destination in Manitoba, we would recommend that a concerted effort be made to produce such an icon. While the discovery of what could be marketed as an icon in the UK market was beyond the scope of the current research, certain potentials definitely exist in Manitoba.

One possibility relies on the fact that Manitoba is home to some of the finest festivals in the world – the Winnipeg Folk Festival and the Winnipeg Fringe Theatre Festival come to mind as exemplars. A strong viral marketing and “buzz” campaign in the UK music and theatre communities could well pay off with something like a “See the Best, then take a Rest” campaign.

Itineraries

Many of the UK respondents when asked about possible itineraries felt that Manitoba would be good for a “road trip”. Consider the following suggested itinerary:

- Fly to Winnipeg and rent Winnebago
- Travel to Portage La Prairie (2 nights)
- Travel to Brandon (3 nights)
- Travel to Minnedosa (1 night)
- Travel to The Pas (6 days)
 - Clearwater park
 - Swimming, canoeing
- Return to Winnipeg (2 nights)
- Fly home

Note: *“Because they speak English in Canada we would ask people we met where are the best places as well as doing our homework before we leave.”*



14.12 The Atlantic Provinces

Overall, the reactions of respondents were very good to the opportunities in the Atlantic Provinces, albeit skewed towards Nova Scotia.

OK now you are talking, museums and art galleries, Canada festivals, Historic Sites, Golf, shopping, beaches WOW.

The general “plan” would be flying into Halifax (or Boston/Maine), staying in Halifax a few days and then car touring. The sole “complaint” about the site was that it lacked easy access to flight information.

One of the key advantages identified was that Halifax was close enough to allow for a city trip (~3-4 days). Other core advantages to the region as a whole included “seafood vacations”, a longer sense of history and extensive cultural opportunities in both an urban setting and a semi-rural setting.

As a note, the entire seaboard area from Labrador to Nova Scotia plays a part in English, Irish and Welsh mythography (e.g. The Voyage of St. Brendan the Navigator). In some ways, the Atlantic provinces were the “edge of the world” for pre-Columbian Europe, and this can be used as the basis for the development of tourist products throughout the region.

In addition, there are strong historical and emotional links between the UK (especially Scotland) and Nova Scotia. While generally unarticulated, these linkages show through in some comments:

I think getting a sense of history from these places that were the furthest flung destinations for sailors in the last few centuries.

On the whole, respondents who had not visited Canada before were more enthusiastic than those who had visited Canada. This is probably due to the lack of an iconic destination – something of a surprise given the general iconic status of Anne of Green Gables (who was not even mentioned once!) and the area being the home of the earliest European settlements in North America.



14.12 The Atlantic Provinces

Product Discussion

The Atlantic Provinces have several fantastic opportunities, primarily in the area of product integration and marketing. These centre around History and Culture, Food and Wine, and Nature.

History and Culture

Several potential iconic destinations are available in this area ranging from the Viking Vineland settlements (limited general appeal, but the oldest European settlements in the New World do have a certain iconic status in Europe), to the early European settlements throughout the region (e.g. Louisburg). Certain areas in the Atlantic Provinces, Halifax in particular, also have an extensive music and arts scene that could also be promoted as part of a “city trip” package.

Food and Wine

“Seafood Tour” products may well become very popular components of vacations over and above their potential draw in the sense of “fine dining”. The “Taste of Nova Scotia” Campaign¹ is an example of the start of such a campaign, but it is important to note that the canadaeastcoast.com site did not link through to either that site or the main listing of vineyards and wineries. With an almost 400 year old tradition of food and winemaking in the province, such a lack of linking is a major mistake.

One possible product would be a modular “Seafood: start to finish” product going from the catch, through the cooking to the dining. While this would, in all probability, only attract seafood aficionados and chefs, it would create a solid seafood “buzz” placing the region in the top of mind for seafood. It could also serve as excellent advertising in fine dining magazines.

Cape Breton also has an extremely good potential draw as a “road tour” destination with a focus on “pub culture”, music and food given the strong links with Scotland. This potential is enhanced by the folk music tradition and would resonate strongly with UK cultural practices.

The Annapolis Valley Wineries also offer an excellent potential for short trip tour products, if marketed properly (i.e. as part of a city trip to Halifax).

¹ <http://www.tasteofnovascotia.com/>



14.12 The Atlantic Provinces

Nature

Certain images of nature (e.g. icebergs calving) as partially iconic and could definitely be used to create / enhance the marketing of iceberg viewing.¹ The imagery of “Nature” held by UK respondents regarding the Atlantic Provinces is quite different from that of the rest of Canada. In particular, they focus on shore lines, coves, icebergs, etc. – basically maritime imagery with a “frontier” or “boundary” motif.

I would then pick up a car for a 5-day driving tour of the south shore route to go see Mahone Bay and Lunenburg and going past Yarmouth on the Evangeline Trail. We would then walk along the ocean floor at Fundy Bay if the timing of the tide was right and then go for a hike in the local area.

Well there is certainly a sense of familiarity and a kind of rugged romance to this part of Canada. Newfoundland, Nova Scotia and the like are very evocative place names with a history that you would be interesting to view. I would fly into Halifax and from there make sure I took in the coastal drives (stopping a lot along the way to explore) the Cabot trail in Nova Scotia looks interesting.

The imagery of “Nature” resonates with the West coast of the UK (except for Newfoundland and Labrador) and creates a sense of “familiarity” and historical connection with the “frontier that was”. Given that the amenities available on the coast are much better than those available in the UK, there is an excellent potential to develop the “sea cottage” rental business that has been popular in the UK for several centuries.

¹ NB: Looking through the Newfoundland and Labrador tourism website is somewhat frustrating in that there is no simple, easily found link to booking an iceberg tour.



14.12 The Atlantic Provinces

On the Website (canadaeastcoast.com)

While the response was generally positive to the site initially, there were some particular problems noted.

I didn't find much factual information on this website - how did you all know you fly into Halifax? So it's hard to give an itinerary as I couldn't find the facts.

I find the web site could be more informative and would appreciate if I could speak to the Canadian Tourist Board and take advice as to a possible itinerary.

Most of the information respondents were looking for was quite readily available on the provincial tourism sites, and we would strongly recommend that there be a very strong effort to increase links between this website and the appropriate provincial sites in the text.



14.12 The Atlantic Provinces

Itineraries

Several different itinerary suggestions appeared ranging from a “shotgun” approach

- Fly to Halifax (2-3 days)
- Drive through Nova Scotia (2-3 days)
 - The fossil and Gem hunt
 - Highlands Nature Park
 - The Cabot Trail
- Transfer to Prince Edward Island (2 days)
 - Golf
 - “Peace”
 - Beaches
 - Shellfish/Lobster
- Transfer to New Brunswick (2-3 days)
- Transfer to Newfoundland (2-3 days)
- Fly home

Through to more in-depth itineraries.

- Fly into Halifax (3 - 5 days)
 - Culture and night life
 - Food
- “Explore” Nova Scotia by car (3-5 days)
- Fly to Newfoundland (3-5 days)
 - Puffins, Whales, Icebergs
 - Northern Lights
 - Side trip to Torngat Mountains National Park (2 days)
- Fly home

For the UK travelers, a key to their itineraries is the ability to “explore”, usually in the form of a “road trip”.



14.13 Forum Summary

Canada has an historical connection with the UK, which has both been beneficial and troublesome. In some ways, the UK still view us as “the colonies” and, barring a few iconic destinations, discount us as an “exotic” destination. This is probably one of the reason why we place so high in the “Dream” category, but poorly in the “actual” category.¹

One of the key findings of this research is the vast level of ignorance of the UK respondents about Canada. In some cases, this plays to our advantage (e.g. “polite”, “caring”, “authentic”), but in some it doesn’t (e.g. “winter nation”, “vast”). This ignorance is especially important when we consider how to develop new products because, in most cases, they actually are unaware of **existing** products – they frequently substitute colonial stereotypes for actual knowledge; knowledge that they only gain by actually coming here.

For our UK respondents, the best tool for selling Canada is **experiencing** Canada, with friend referrals coming second. This has a number of implications for both our tourism strategy and for our products. First of all, the CTC’s Canada: Keep Exploring campaign is exactly right for the UK market since it tags into the UK stereotype of us as a colonial frontier.

But, in order to get them to keep exploring, we have to get them over here in the first place. Given their general ignorance of Canada, this means that we have to influence what Sociologists call their “reference group” (family, friends, co-workers, fellow hobbyists and enthusiasts, etc.). This implies that we need to create a series of viral marketing campaigns to sell our existing tourism products, while creating new ones in line with the desires of these reference groups.

¹ It should also be noted that for at least several respondents, Canada was viewed as an excellent place to immigrate to as well as vacation in.



Section 15: The Travel Trade



15.1 U.K. Travel Trade

1. Perceived Market Trends

a) Destination Trends

- ♦ The U.K. travel trade do not see any major shifting in long-haul destinations from their vantage points as individual retailers and wholesalers.
- ♦ Long-haul travel appears to be growing globally to all destinations in their view.
- ♦ However, noteworthy factors:
 - ♦ Difficulties in dealing with homeland security may be negatively affecting U.S. travel.
 - ♦ *"Everyone is targeting the U.K."* in their view, including newly aggressive players – India, China, Brazil, South Africa.
 - ♦ The U.S., New Zealand, South Africa and Australia have "huge" budgets.
 - ♦ The current New Zealand ("100% Pure Natural") and the Australian campaign ("Where the Bloody Hell Are You?") have received high exposure and positive reviews.

b) Changing Needs

- ♦ Greater use of the internet and the availability of detailed information on destinations appear to be producing a more confident traveller:
 - ♦ More online bookings
 - ♦ More aware of what they want
 - ♦ More independent
 - ♦ More self-drives
- ♦ More demanding of service and standards of accommodation.
- ♦ Older travellers (50+) want to be more active.
- ♦ The traditional "lie around" beach vacation is giving way to more active holidays



15.1 U.K. Travel Trade

c) Planning/Booking Trends

- ♦ Travellers are using the web for planning and destination decision making.
- ♦ Clearly more direct booking online of air, hotels, car rental and even packages.
- ♦ Virtually all agents surveyed said that travellers to Canada had **all** made up their mind to go to Canada **prior** to visiting the agent.
- ♦ Consequently, today the agent has little influence on selling Canada as a destination. However, this can be influential in promoting and marketing specific side trips, activities and other interesting choices.
- ♦ Hence, for peripheral regions and attractions (beyond the core itinerary) they can be highly important.

d) Product/Packaging Trends

- ♦ Existing packages tend to be narrow in range and limited in the trade's view and they see little evolvement in package designs.
- ♦ Agents are involved with travellers who want customized, more complex itineraries not easily purchased on the net.

e) Advertising/Promotion Trends

- ♦ Movies and television are major influencers (e.g. *Lord of the Rings* for New Zealand, soccer, rugby, cricket tournaments for Australia, film and television shows for the U.S.)
- ♦ New Zealand and Australia advertising campaign have received high recall and reviews, as noted earlier.

f) Forecast For The Next Five Years

- ♦ More internet booking, less sales for agents.
- ♦ Survivors will focus more on complex, customized travel.



15.1 U.K. Travel Trade

2. Canada's Image

a) Canada's Competition

- ♦ Agents have a difficult time defining who Canada's competitors are because the same clients go both to Europe and to a wide range of long-haul destinations, depending on the circumstances. However, among long-haul alternatives, common perceptions are:
 - ♦ New Zealand – similar product (nature), Commonwealth country, English spoken.
 - ♦ America – especially in fall and winter (e.g., pre-Christmas shopping, skiing).
 - ♦ South Africa

b) Canada's Strengths

- ♦ Predictably, Canada's natural icons are the major selling point – particularly the Rockies, the Rocky Mountaineer train, and the Vancouver area.
- ♦ Other key strengths:
 - ♦ English speaking
 - ♦ Hospitable people
 - ♦ Easy to get to with direct flights and relatively short flying times
 - ♦ Quality of product (e.g., accommodation excellent)
 - ♦ Exchange rate is favourable
 - ♦ Canada not "super expensive"
 - ♦ Toronto a viable alternative for a short city break
 - ♦ Toronto pre-Christmas can be viable alternative to New York for shopping
 - ♦ Can be in a city (e.g. Vancouver) and in nature on the same day
 - ♦ More viable for 2 weeks than New Zealand (often 6 weeks)



15.1 U.K. Travel Trade

c) Canada's Weaknesses

- ♦ A common perception is that Canada is cold (note: CTC website should provide current temperatures in major locations to demonstrate reality).
- ♦ Canada's image is too focused on nature and does not balance the image with reassurance of the comforts of infrastructure (discussed later).
- ♦ Packages available are quite limited – focusing on traditional, standard itineraries.
- ♦ Given the importance of popular films, Alberta, for example, missed an opportunity to inform the market that the highly appealing scenery in *"Brokeback Mountain"* was in fact in Alberta.

d) Ideal Brand Image

- ♦ Most in the trade believe that Canada's brand image must evolve beyond simply depicting nature and needs to reassure travellers that also present are the comforts and security of "infrastructure". This can include:
 - ♦ Showing people enjoying themselves in bars, clubs and restaurants, having a good time – not necessarily cities (that is what they came from) but rather civilized amenities with scenery in the background.
 - ♦ Spa resorts
 - ♦ Shopping
 - ♦ Good food
- ♦ The nature side can be enhanced with soft adventure and other experiential opportunities, but always featuring amenities close by to minimize the "fear" factor of wilderness.
- ♦ For the family market, the image can take a different twist. Agents believe there is a real opportunity to market Canada to families, positioning Canada as:
 - ♦ A "natural Disneyland"
 - ♦ An opportunity to expose children to whales, canoeing, seeing wildlife, ranches, horseback riding, resorts with hiking, kayaking, etc
 - ♦ But, taking great care to reassure parents that the nature based experiences are safe



15.1 U.K. Travel Trade

3. Travel Products

a) Common Itineraries

i) B.C./Rockies

- ♦ This is by far the most common destination for Brits, according to the trade. The itinerary is typically:
 - ♦ 2 weeks
 - ♦ Includes Vancouver area, up to the Rockies
 - ♦ Rocky Mountaineer rail excursion from Vancouver to Calgary is highly appealing (clearly well marketed in the UK).
- ♦ Examples of memorable moments:
 - ♦ *"Vancouver is a "brilliant" city to live in"*
 - ♦ *"Going onto (Columbia Ice Fields) glacier"*

ii) Toronto and Niagara Falls

- ♦ Toronto is viewed as quite accessible—a medium haul flight
- ♦ Often a long weekend city break
- ♦ Becoming popular as a pre-Christmas shopping opportunity (instead of New York).

iii) Alaskan Cruise

- ♦ Likely including a visit to Vancouver area
- ♦ Overall, there are a number of other relevant observations.
 - ♦ Packages do not have to include too many extra activities, since clients are often reluctant to pay in advance. They would rather make the decision while in Canada and book locally (e.g. heli tours over Niagara Falls).
 - ♦ Fly-drive is very popular
 - ♦ Outdoor activity preferences tend to be relatively passive – walking, fishing, Niagara Falls boat ride, wildlife viewing from bus or highway.



15.1 U.K. Travel Trade

b) Atlantic Canada

- ♦ Atlantic Canada has relatively low interest as a tourist destination from the U.K. One issue is the perceived similarities with the U.K. especially the Devon and Cornwall regions and Scotland.
- ♦ Agents say that the region needs to focus on its uniqueness and its strengths – for example:
 - ♦ Proximity--relative short and direct flights into region (e.g. Halifax)
 - ♦ Lighthouses
 - ♦ Whale watching
 - ♦ Iceberg viewing
 - ♦ Put tourists into light house or unique type of accommodation
 - ♦ Unique dancing

c) Product Opportunities

- ♦ Most claim that their existing markets are older (e.g., 40+, 50+, 55+, 60+)
- ♦ However, they see an opportunity with the family markets, given the educational and entertainment opportunities in Canada's natural environment, discussed earlier.
- ♦ Many also believe that selling Toronto during November and December pre-Christmas for extended weekend trips to shop has real potential. Toronto can be positioned as a viable alternative to New York with the advantage of avoided home security concerns.
- ♦ Current packages are not considered to be very interesting or inventive. In the view of agents, tour operators are offering only "tried and true" packages that they can market worldwide.
- ♦ The trade would like to see more focus on unique, interesting experiences – for example:
 - ♦ First nations
 - ♦ Dinosaurs fossil site – Alberta
 - ♦ Tremendous fishing
 - ♦ Wildlife viewing
 - ♦ Extreme sports for younger travellers (e.g., white water rafting, heli skiing).



4. Repositioning Canada

- ♦ Canada's core selling proposition is clearly the opportunity to get close to world class nature. However, to strengthen the appeal of Canada to UK travellers requires some modification.
- ♦ **Intimidating nature** – while a key appeal of Canada is to see and experience its nature, the trade reminds us that it can be very intimidating to prospective travellers. Consequently, presenting nature products must be done very carefully.
 - ♦ *"It must be showcased in a way to minimize fears, especially for 50+ travellers"*
 - ♦ *"Remember most have never been in a kayak before"*
 - ♦ *"A mountain hike sounds scary"*
 - ♦ *"The notion of meeting up with a bear is very intimidating"*
- ♦ **Balancing the image**– while nature gets Canada on the priority list and is its principle drawing card, prospects need to be reminded of the comforts of infrastructure are also present.
 - ♦ *"After seeing the lakes, can I go and relax in a pub with my friends, or will I end up sitting there with a bear?"*
 - ♦ It is critical then to communicate that British travellers can literally experience authentic nature, yet have the other foot firmly planted in the infrastructure (not necessarily a city. It could be a resort).
 - ♦ **Weather** – it is perceived to be cold November to April. Given the popularity of Vancouver, actual temperatures should be shown on the website to reassure travellers.



15.1 U.K. Travel Trade

5. Trade Support

a) Improving Marketing

Suggestions include:

- ♦ Big opportunity to target age 60+, now not a CTC target.
- ♦ Target families – positioning Canada as a “Natural Disneyland”
- ♦ Promote Toronto as an extended weekend trip for shopping prior to Christmas as an alternative to New York.
- ♦ Small resorts should form regional partnerships to promote their area. Come in and chat with us. Pitch the area as one region to be added on to a traditional itinerary (e.g., Georgia Triangle as add-on to Toronto/Niagara Falls visit). (Remember that while agents may no longer be influencers in selling Canada as a destination, they can be very influential in selling add-ons or in recommending itinerary adjustments.)
- ♦ Regions like Atlantic Canada should attend trade shows, get operators involved. Also, approach specialty niche markets directly on the internet (e.g., fishing, bird watching societies, etc.).

b) CTC Activity

- ♦ Some agencies, especially those in the Canadian specialist program, are well aware of the CTC and find them very helpful:
 - ♦ Help with agency promotional evenings
 - ♦ Listed on their website as a specialist
 - ♦ Really good training program
 - ♦ Staff (“Roger”) always there to answer questions
 - ♦ Better support than Australia or New Zealand provide
 - ♦ They give us what we ask for (in terms of materials)
- ♦ However, if they are not part of the specialist programme, there is a likelihood that the agency has little or no contact with the CTC.



15.1 U.K. Travel Trade

c) Improving CTC Service

- ♦ Come out and do more Canada evenings
- ♦ More trade show involvement
- ♦ More information on each region
- ♦ Especially for the family market, suggestions on or direction in how to find and sell product that could appeal to parents wanting an educational experience for their children:
 - ♦ A canoe trip combined with an explanation of how canoes are made
 - ♦ Maple syrup making demos
 - ♦ More information on home stays and how people can experience the Canadian way of life

6. Canadian Receptives

a) Product Needs

- As in other countries, the receptives working with the UK market reconfirm that the UK traveller is looking for an experiential product, experiences that create memorable moments that can be shared with friends and family long after the trip ends.
- For example, in Atlantic Canada, which many Brits and agents say suffers for a sameness with parts of Britain, the focus must be on unique and interesting experiences and on opportunities to get involved—with such activities as:
 - Ice berg viewing
 - Whale watching
 - Staying in lighthouses
 - The Acadian culture and history
 - The Scottish connection
 - Winery tours
 - Gastronomy
 - Educational touring



15.1 U.K. Travel Trade

b) Communication

- The constant theme played back by the trade and consumers in the UK comes out again here:
 - The traveller wants the comforts of an urban setting as well as getting out into nature
 - The real appeal of Canadian nature is not only that it is close by, but also that it is authentic.
 - You can go on real hikes, have real exposure to nature
- As well, the friendly nature of Canadian people is a highly saleable asset.

c) Trade Assistance

- As for other countries, Canadian receptives have a wide range of interesting product available, but tour operators are unwilling to pick them up. Unless it is proven that demand exists, they are reluctant to devote precious space in their brochures to them.
- Many would like the CTC to take on the challenge of pushing operators to pick up new product.
- The focus in their view should be packages that include the essential product (e.g. a short stay in the cities), then building in exciting lifestyle and nature experience add-ons.
- Again, they remind us that the cities should be positioned more as gateways to Canadian experiences, not destinations in themselves.
- Other remarks:
 - The CTC and provincial/ city partners need to work together to create more synergy.
 - They want a closer relationship with the CTC
 - Some criticism of events like Trafalgar Square Canada days, believing that CTC funds could be better directed to trade and its product positioning.



15.1 U.K. Travel Trade

Travel Trade Summary

- ♦ The key piece of learning from the UK travel trade interviews is that, according to agents, virtually all prospective visitors to Canada that contact them have **already made up their mind to visit Canada** prior to engaging them.
- ♦ In other words, while the agent may be influential in choosing the specific itinerary within Canada, they are not driving the decision to choose Canada.
- ♦ The internet is the new powerful influencer in this behavioural shift. Consumers are now empowered with a source of knowledge that they never had before.
- ♦ The implication for the CTC is that the travel trade becomes less important as a route to driving travel to Canada. The focus must now shift even more to promoting Canada direct to the consumer—especially via the net.
- ♦ On the product side. Agents strongly agree that there is not enough new product on the market for Canada, yet there are endless opportunities to expand the product offering— the countless interesting and unique experiences beyond the well known attractions (e.g. The Rockies, The Rocky Mountaineer train, Niagara Falls, Vancouver, Toronto, etc).
- ♦ These include unique nature based attractions as well as urban focused.
- ♦ Receptives confirm that clients are looking for more experiential product today.
- ♦ However, one of the major barriers to broadening the product offering lies with the operators who are reluctant to experiment with new packages unless there is proven demand in advance.
- ♦ The chart on the next page illustrates the Old Model of decision making.
- ♦ Under the old model of product distribution, the consumer purchased what the travel agent offered which, in most cases, was what the tour operators put together in their brochures.
- ♦ The narrowness of their offering restricts consumer appeal because many of the most exciting vacation ideas never make it to market. Receptives confirm that they have plenty of ideas, but there is real resistant by operators to pick up those product ideas.



15.1 U.K. Travel Trade

- ♦ The trend is now toward the consumer going directly to the internet (among other sources like past visitors) for ideas, less reliant on tour operator offerings.
- ♦ This reinforces how important it is for the Partners to develop their websites and ensure that the right kind of product is available on the internet.



Appendix



Questionnaire

Insignia Marketing Research Inc.

October 19, 2007
T703-07 FINAL

UK Travel Survey

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

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

- North East ☐
- Yorkshire / Humberside ☐
- East Midlands ☐
- Eastern ☐
- Greater London ☐
- South East ☐
- South West ☐
- West Midlands ☐
- North West/Merseyside ☐
- Wales ☐
- Scotland ☐
- None of the above (terminate) ☐

2) Are you...

- Male ☐
- Female ☐

50/50 Gender Split

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

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

END INTERVIEW

MINIMUM N=100 (UK, FRANCE) N=100 (GERMANY) OF AGED 60+

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

- Market research ☐
- Travel and tourism industry ☐
- An advertising agency ☐
- A newspaper, radio or TV station ☐
- None of the above ☐

- ☐ TERMINATE
- ☐ IF CHECKED

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3c) In the past three years, that is since September, 2004, how many times have you, yourself, taken a pleasure trip outside of your home country for 3 nights or longer with at least one night in paid accommodation. Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

_____ trips [ACCEPT RANGE 1-99]
None ☐

The following questions that we are going to ask you concern only long-haul pleasure trips. By that we mean pleasure trips beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation. It includes all trips for pleasure or personal reasons including to visit friends and relatives as well as trips where you combined business with a pleasure trip. However, it excludes any trips that were for business purposes only or for study purposes only. (IF NONE IN Q.3C SKIP TO Q.5)

4) In the past three years, that is since September, 2004, how many times have you, yourself, taken a pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation? Again, please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

_____ trips [ACCEPT RANGE 1-99] [MUST BE EQUAL OR LESS THAN Q.3C]
None ☐

5) In the next two years, that is before September, 2009, how likely is it that you will take a pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation? Are you: (Select one only)

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

IF NONE, IN Q.3c OR 4 AND IF SOMEWHAT, NOT VERY OR NOT AT ALL LIKELY IN Q.5 END INTERVIEW

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Questionnaire

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- 6a) Thinking of future travel beyond the European Union countries, North Africa and the Mediterranean, what countries would you be likely to visit on a pleasure trip for 3 nights or longer with at least one night in paid accommodation in the next two years? Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only. (Please select your most likely choices with up to 5 countries from the list below or write in your choices if not listed) (PN: LIST FROM Q.7 WITH CODES 14-31, 46-50, 52 SUPPRESSED)

Russia	Russia	<input type="checkbox"/>	
Orient/Asia	China	<input type="checkbox"/>	
	Hong Kong	<input type="checkbox"/>	
	Japan	<input type="checkbox"/>	
	Singapore	<input type="checkbox"/>	
	Malaysia	<input type="checkbox"/>	
	Thailand	<input type="checkbox"/>	
	Vietnam	<input type="checkbox"/>	
	India	<input type="checkbox"/>	
	Other Orient/Asia	<input type="checkbox"/>	
	Pacific	Australia	<input type="checkbox"/>
	New Zealand	<input type="checkbox"/>	
	Other Pacific	<input type="checkbox"/>	
North America	Canada	<input type="checkbox"/>	
	United States	<input type="checkbox"/>	
South/Central America	Argentina	<input type="checkbox"/>	
	Brazil	<input type="checkbox"/>	
	Mexico	<input type="checkbox"/>	
	Other South/Central America	<input type="checkbox"/>	
Caribbean	Caribbean	<input type="checkbox"/>	
Middle East	Dubai	<input type="checkbox"/>	
	Iran	<input type="checkbox"/>	
	Israel	<input type="checkbox"/>	
	Lebanon	<input type="checkbox"/>	
	Turkey	<input type="checkbox"/>	
	United Arab Emirates	<input type="checkbox"/>	
	Other Middle East	<input type="checkbox"/>	
	South Africa	<input type="checkbox"/>	51 (52 BLANK)
	Other Africa, excluding North African countries	<input type="checkbox"/>	53
		Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	
	Other (specify) _____	<input type="checkbox"/>	
	None	<input type="checkbox"/>	SKIP TO Q.7

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Insignia Marketing Research Inc.

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

		1 st	2 nd	3 rd	4 th	5 th
Russia	Russia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orient/Asia	China	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Japan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	India	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Orient/Asia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Pacific	Australia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	New Zealand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Other Pacific	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
North America	Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	United States	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
South/Central America	Argentina	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Brazil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Other South/Central America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Caribbean	Caribbean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Middle East	Dubai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Iran	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Israel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Lebanon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	South Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Africa, excluding North African countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Africa	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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Questionnaire

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7) (ASK THOSE WHO ANSWERED 1+ IN Q.4, OTHERS SKIP TO Q.20) (ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF NONE IN Q.4) During the past 3 years which of these countries or destinations outside the United Kingdom did you visit for pleasure and stayed for 3 nights or longer with at least one night in paid accommodation, if any?

Russia	Russia	<input type="checkbox"/> 1
Orient/Asia	China	<input type="checkbox"/> 2
	Hong Kong	<input type="checkbox"/> 3
	Japan	<input type="checkbox"/> 4
	Singapore	<input type="checkbox"/> 5
	Malaysia	<input type="checkbox"/> 6
	Thailand	<input type="checkbox"/> 7
	Vietnam	<input type="checkbox"/> 8
	India	<input type="checkbox"/> 9
	Other Orient/Asia	<input type="checkbox"/> 10
Pacific	Australia	<input type="checkbox"/> 11
	New Zealand	<input type="checkbox"/> 12
	Other Pacific	<input type="checkbox"/> 13
Eastern Europe	Bulgaria	<input type="checkbox"/> 14
	Czech Republic	<input type="checkbox"/> 15
	Hungary	<input type="checkbox"/> 16
	Poland	<input type="checkbox"/> 17
	Romania	<input type="checkbox"/> 18
Western Europe	Other Eastern Europe	<input type="checkbox"/> 19
	Austria	<input type="checkbox"/> 20
	Belgium	<input type="checkbox"/> 21
	France	<input type="checkbox"/> 22
	Germany	<input type="checkbox"/> 23
	Greece	<input type="checkbox"/> 24
	Ireland	<input type="checkbox"/> 25
	Italy	<input type="checkbox"/> 26
	Netherlands	<input type="checkbox"/> 27
	Portugal	<input type="checkbox"/> 28
	Spain	<input type="checkbox"/> 29
	Switzerland	<input type="checkbox"/> 30
	Other Europe	<input type="checkbox"/> 31
North America	Canada	<input type="checkbox"/> 32
	United States	<input type="checkbox"/> 33
South/Central America	Argentina	<input type="checkbox"/> 34
	Brazil	<input type="checkbox"/> 35
	Mexico	<input type="checkbox"/> 36
	Other South Central America	<input type="checkbox"/> 37
Caribbean	Caribbean	<input type="checkbox"/> 38
	Dubai	<input type="checkbox"/> 39
Middle East	Iran	<input type="checkbox"/> 40
	Israel	<input type="checkbox"/> 41
	Lebanon	<input type="checkbox"/> 42
	Turkey	<input type="checkbox"/> 43
	United Arab Emirates	<input type="checkbox"/> 44
	Other Middle East	<input type="checkbox"/> 45
Africa	Egypt	<input type="checkbox"/> 47
	Kenya	<input type="checkbox"/> 48
	Morocco	<input type="checkbox"/> 49
	Tanzania	<input type="checkbox"/> 50
	Tunisia	<input type="checkbox"/> 51
	South Africa	<input type="checkbox"/> 52
	Other Africa	<input type="checkbox"/> 53
	Other (specify) _____	<input type="checkbox"/> 54
	Other (specify) _____	<input type="checkbox"/> 55
	Other (specify) _____	<input type="checkbox"/> 56
	None	<input type="checkbox"/>

[PN: MAKE SURE AT LEAST ONE COUNTRY IS CHECKED. IF NONE, TERMINATE]
[PN: IF CHECKED ANY OF THE BOXED DESTINATIONS (CODE 14-31,46-50), AND IF AT LEAST ONE COUNTRY OUTSIDE OF CODE 14-31, 46-50 IS NOT CHECKED TERMINATE.]

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(ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF CANADA IS NOT SELECTED IN Q.7) (QUOTA N=400 FOR AUGMENT IS BASED ON CANADA SELECTED IN Q.7)

(PN: AUGMENT QUOTA - 400 IN TOTAL MUST SELECT CANADA IN Q.7 (INCLUDES THOSE FROM THE MAIN SAMPLE (FOR EXAMPLE IF WE OBTAIN 100 FROM THE MAIN SAMPLE ONLY NEED 300 - FLAG THOSE FROM THE MAIN SAMPLE VS. AUGMENT)(Augment quotas per country?))

8a.) Thinking about your most recent pleasure trip of 3 nights or longer with at least one night in paid accommodation to somewhere beyond the European Union countries, North Africa and the Mediterranean, which of these places did you visit on that trip? (PN: LIST FROM Q.7 WITH CODES 14-31,46-50,52 SUPPRESSED)

Russia	Russia	<input type="checkbox"/>
Orient/Asia	China	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>
	Japan	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>
	India	<input type="checkbox"/>
	Other Orient/Asia	<input type="checkbox"/>
Pacific	Australia	<input type="checkbox"/>
	New Zealand	<input type="checkbox"/>
	Other Pacific	<input type="checkbox"/>
North America	Canada	<input type="checkbox"/>
	United States	<input type="checkbox"/>
South/Central America	Argentina	<input type="checkbox"/>
	Brazil	<input type="checkbox"/>
	Mexico	<input type="checkbox"/>
	Other South/Central America	<input type="checkbox"/>
Caribbean	Caribbean	<input type="checkbox"/>
Middle East	Dubai	<input type="checkbox"/>
	Iran	<input type="checkbox"/>
	Israel	<input type="checkbox"/>
	Lebanon	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>
Africa	South Africa	<input type="checkbox"/>
	Other Africa, excluding North African countries	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>

(PN: SHOW THE WHOLE LIST OF COUNTRIES FOR Q.8A. (PN: MULTIPLE DESTINATIONS ALLOWED. NO LIMITS)

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Questionnaire

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

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

9a) What were your reasons for travelling to (Q.8a DESTINATION -[PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS])? (check as many as apply).

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

	9a)	9b)
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches, and mountains	<input type="checkbox"/>	<input type="checkbox"/>
Honeymoon	<input type="checkbox"/>	<input type="checkbox"/>
To experience local culture	<input type="checkbox"/>	<input type="checkbox"/>
To interact with the local people	<input type="checkbox"/>	<input type="checkbox"/>
To visit historic sites, museums, or galleries	<input type="checkbox"/>	<input type="checkbox"/>
To visit protected areas, including Nature Reserve, Regional or National parks [UK ONLY]	<input type="checkbox"/>	<input type="checkbox"/>
To visit Naturschutzzone(n) und/oder Naturreservat(e) oder Nationalpark(s) [GERMANY ONLY]	<input type="checkbox"/>	<input type="checkbox"/>
To visit Parc naturel national ou Parc naturel régional [FRANCE ONLY]	<input type="checkbox"/>	<input type="checkbox"/>
To attend festivals and/or events	<input type="checkbox"/>	<input type="checkbox"/>
To see and watch wildlife	<input type="checkbox"/>	<input type="checkbox"/>
To view aboriginal sites and events	<input type="checkbox"/>	<input type="checkbox"/>
For entertainment and nightlife	<input type="checkbox"/>	<input type="checkbox"/>
To go shopping	<input type="checkbox"/>	<input type="checkbox"/>
To go downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
To see new places	<input type="checkbox"/>	<input type="checkbox"/>
To visit a spa, health centre, or hot springs	<input type="checkbox"/>	<input type="checkbox"/>
Low rates, good deals, and discounts	<input type="checkbox"/>	<input type="checkbox"/>
To relax, unwind, and decompress	<input type="checkbox"/>	<input type="checkbox"/>
To participate in outdoor activities	<input type="checkbox"/>	<input type="checkbox"/>
To visit friends and relatives	<input type="checkbox"/>	<input type="checkbox"/>
A trip that combined business with pleasure	<input type="checkbox"/>	<input type="checkbox"/>
To realize a long term dream	<input type="checkbox"/>	<input type="checkbox"/>
To experience big cities in another country	<input type="checkbox"/>	<input type="checkbox"/>
To be together as a family	<input type="checkbox"/>	<input type="checkbox"/>
Other reasons	<input type="checkbox"/>	<input type="checkbox"/>

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10a) On that trip to (Q. 8a) DESTINATION-[PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS], how many nights, in total, were you away from home? [ACCEPT RANGE 3-999]
_____nights

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

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

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

[PN: SKIP Q10C AND AUTO PUNCH NONE AT Q.10C IF ANSWER AT Q.10A EQUAL TO ANSWER AT Q.10B]

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

	NIGHTS
British Columbia (includes Vancouver, Victoria and Whistler)	_____
Alberta (includes Calgary, Edmonton, Banff, and Jasper)	_____
Saskatchewan (province)	_____
Manitoba (province)	_____
Ontario (includes Ottawa, Toronto and Niagara Falls)	_____
Quebec (includes Montreal and Quebec City)	_____
Nova Scotia (Atlantic Canada)	_____
New Brunswick (Atlantic Canada)	_____
Prince Edward Island (Atlantic Canada)	_____
Newfoundland and Labrador (Atlantic Canada))	_____
Yukon Territory (Northern Canada)	_____
Northwest Territories (Northern Canada)	_____
Nunavut (Northern Canada)	_____

TOTAL MUST EQUAL ANSWER TO Q.10b)

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Questionnaire

Insignia Marketing Research Inc.

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11. And when did you take that trip to (DESTINATION IN Q.8a-PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? Please tell me the year and month you started that trip?

Year	[ACCEPT 2004 TO CURRENT YEAR]
Month	
January	<input type="checkbox"/>
February	<input type="checkbox"/>
March	<input type="checkbox"/>
April	<input type="checkbox"/>
May	<input type="checkbox"/>
June	<input type="checkbox"/>
July	<input type="checkbox"/>
August	<input type="checkbox"/>
September	<input type="checkbox"/>
October	<input type="checkbox"/>
November	<input type="checkbox"/>
December	<input type="checkbox"/>

MUST
CHECK
ONE

12. With whom did you travel on that trip to (DESTINATION IN Q.8a-PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? (check as many as apply)

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

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

_____ People [2-99]

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

_____ People [0-99]

PN: SHOULD BE
LESS THAN Q.13A

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- 14a) Were any of the following a source of inspiration for you to decide to travel to PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS (DESTINATION IN Q.8A)? (please select as many as apply)

- 14b) Which of those was the main source of inspiration for choosing that destination? (please select one only) [PN: SHOW THOSE CHECKED IN Q.14A]

	14a	14b
Television travel show	<input type="checkbox"/>	<input type="checkbox"/>
Other television show	<input type="checkbox"/>	<input type="checkbox"/>
Saw a film on destination	<input type="checkbox"/>	<input type="checkbox"/>
Celebrity travelled there	<input type="checkbox"/>	<input type="checkbox"/>
Story in a magazine or newspaper	<input type="checkbox"/>	<input type="checkbox"/>
A news story	<input type="checkbox"/>	<input type="checkbox"/>
Friend or relative	<input type="checkbox"/>	<input type="checkbox"/>
Business reasons	<input type="checkbox"/>	<input type="checkbox"/>
Direct mail or email advertising	<input type="checkbox"/>	<input type="checkbox"/>
In-flight magazine	<input type="checkbox"/>	<input type="checkbox"/>
Destination travel guide	<input type="checkbox"/>	<input type="checkbox"/>
Consumer travel trade show	<input type="checkbox"/>	<input type="checkbox"/>
Radio advertising	<input type="checkbox"/>	<input type="checkbox"/>
The Internet	<input type="checkbox"/>	<input type="checkbox"/>
Travel agent/tour operator	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
NONE	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

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

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Questionnaire

Insignia Marketing Research Inc.

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T703-07 FINAL

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

- | | |
|---|--------------------------|
| Word/phrase search engine (e.g., Google, Yahoo, MSN) | <input type="checkbox"/> |
| Websites of national tourist offices | <input type="checkbox"/> |
| Websites of other government tourist organizations (e.g., provincial, regional or local government tourist offices) | <input type="checkbox"/> |
| General travel sites such as Expedia, Travelocity or Orbitz | <input type="checkbox"/> |
| Traveller review site (e.g., tripadvisor.com) | <input type="checkbox"/> |
| Local travel agency online | <input type="checkbox"/> |
| Tour operators websites | <input type="checkbox"/> |
| Resort websites | <input type="checkbox"/> |
| Hotel websites | <input type="checkbox"/> |
| Car rental websites | <input type="checkbox"/> |
| Airline websites | <input type="checkbox"/> |
| Other private sector website(s) | <input type="checkbox"/> |
| Travel blogs (please specify which sites) | <input type="checkbox"/> |

Other sites (please specify which sites) ☐

15a) How long before your trip did you definitely decide to go on that trip to (DESTINATION IN Q.8a - (PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? RECORD NUMBER. (Did you want to expand year limit?)

____ Days OR ____ Weeks OR ____ Months OR ____ Years
[1-365] [1-99] [1-99] [1-10]

15b) And how long before your trip to (DESTINATION IN Q.8a) did you actually book it? (PN: ANSWER IN Q15B - SHOULD BE LESS THAN OR EQUAL TO Q15A)

____ Days OR ____ Weeks OR ____ Months OR ____ Years
[1-365] [1-99] [1-99] [1-10]

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

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

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

- | | |
|--------------------------------|---------------------------------------|
| Immediate party only/self only | <input type="checkbox"/> |
| Part of a larger group tour | <input type="checkbox"/> SKIP TO Q.18 |

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

- | | |
|-----|--|
| Yes | <input type="checkbox"/> |
| No | <input type="checkbox"/> SKIP TO Q.17c |

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

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

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

- | | |
|-----|--------------------------|
| Yes | <input type="checkbox"/> |
| No | <input type="checkbox"/> |



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17d) On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?

Trip Components	Booked Before Leaving Home		Booked During Trip		Does not apply
Example:	75%	+	25%	= 100%	<input type="checkbox"/>
Airfare	_____	+	_____	= 100%	<input type="checkbox"/>
All airport transfers	_____	+	_____	= 100%	<input type="checkbox"/>
Local flights between overnight destinations	_____	+	_____	= 100%	<input type="checkbox"/>
Car rentals	_____	+	_____	= 100%	<input type="checkbox"/>
Ground transportation between overnight destinations	_____	+	_____	= 100%	<input type="checkbox"/>
Paid accommodation	_____	+	_____	= 100%	<input type="checkbox"/>
Admission to local attractions	_____	+	_____	= 100%	<input type="checkbox"/>
Admission to events (festivals, concerts, etc.)	_____	+	_____	= 100%	<input type="checkbox"/>
Guided tours at destinations	_____	+	_____	= 100%	<input type="checkbox"/>
Other activities (recreational activities, spa, etc.)	_____	+	_____	= 100%	<input type="checkbox"/>

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

- Luxury city hotel ☐
- Mid-priced city hotel/motel ☐
- Budget city hotel ☐
- Resort hotel (e.g., mountain resort, seaside resort, lakeside resort, ski resort, etc.) ☐
- Bed & breakfast ☐
- Guest ranch ☐
- On a farm ☐
- On a cruise ship ☐
- Cottage/cabin ☐
- Camping ☐
- Caravan/Motor home ☐
- Authentic wilderness lodge ☐
- Home of friend or relative ☐
- Other ☐

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19a) Which, if any, of the following activities did you participate in while on that trip to (DESTINATION IN Q. 8a - (PA: SHOW MULTIPLE DESTINATIONS. NO LIMITS). Please check all that apply. RANDOMIZE STATEMENTS

	Yes	No
Seeing old architecture	<input type="checkbox"/>	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>	<input type="checkbox"/>
Visiting world heritage sites	<input type="checkbox"/>	<input type="checkbox"/>
Seeing modern architecture	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>	<input type="checkbox"/>
Visiting friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Viewing mountains	<input type="checkbox"/>	<input type="checkbox"/>
Viewing glaciers	<input type="checkbox"/>	<input type="checkbox"/>
Viewing rivers or waterfalls	<input type="checkbox"/>	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful beaches and coastlines	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>	<input type="checkbox"/>
Sport fishing	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
Helicopter skiing	<input type="checkbox"/>	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>	<input type="checkbox"/>
Taking a rail tour	<input type="checkbox"/>	<input type="checkbox"/>
Fine dining	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Visiting hot springs	<input type="checkbox"/>	<input type="checkbox"/>
Staying at a luxury resort	<input type="checkbox"/>	<input type="checkbox"/>
Taking a garden or flower tour	<input type="checkbox"/>	<input type="checkbox"/>
Observing wildlife in their natural environment	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>
Studying English (FRANCE AND GERMANY ONLY)	<input type="checkbox"/>	<input type="checkbox"/>
Viewing autumn leaves	<input type="checkbox"/>	<input type="checkbox"/>
Viewing aurora borealis (Northern lights)	<input type="checkbox"/>	<input type="checkbox"/>
Camping in a natural setting	<input type="checkbox"/>	<input type="checkbox"/>
Attending festivals or fairs	<input type="checkbox"/>	<input type="checkbox"/>
Attending professional sports events	<input type="checkbox"/>	<input type="checkbox"/>
Attending rodeos	<input type="checkbox"/>	<input type="checkbox"/>
Trail riding on horseback	<input type="checkbox"/>	<input type="checkbox"/>
Taking a wine/culinary tour	<input type="checkbox"/>	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>	<input type="checkbox"/>
Visiting small towns	<input type="checkbox"/>	<input type="checkbox"/>
Visiting casinos	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
Taking city tours	<input type="checkbox"/>	<input type="checkbox"/>
Taking nature tours	<input type="checkbox"/>	<input type="checkbox"/>

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- 19b) What was the total cost of that trip in British pounds to (DESTINATION IN Q. 8a - PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS). for you and your immediate travel party, including airfare and all other costs? (ACCEPT ONE ANSWER ONLY)
(Currency the same for all sample countries?)

Under £1,000	<input type="checkbox"/>
£1,000 - £1,999	<input type="checkbox"/>
£2,000 - £3,999	<input type="checkbox"/>
£4,000 - £5,999	<input type="checkbox"/>
£6,000 - £7,999	<input type="checkbox"/>
£8,000 - £9,999	<input type="checkbox"/>
£10,000+	<input type="checkbox"/>

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

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

- 19d) How likely are you to recommend that destination to others?

Definitely will recommend to others	<input type="checkbox"/>
Very likely	<input type="checkbox"/>
Somewhat likely	<input type="checkbox"/>
Not very likely	<input type="checkbox"/>
Not at all likely	<input type="checkbox"/>
Definitely will not recommend to others	<input type="checkbox"/>

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

PN: THE MAXIMUM TIMES THE RESPONDENT IS ASKED IS TWO TIMES. IF TWICE, ONCE REGARDING MOST RECENT TRIP, THE OTHER TIME REGARDING THE TRIP TO CANADA (PN: PLEASE LABEL THEM AS Q.8A-1 TO Q.19D-1)

FORCING ANSWER CANADA IN Q.8A-1 IF Q7 HAS CANADA (LAST TRIP TO CANADA SECTION)

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ASK EVERYONE

20. Please imagine that you are taking an overseas pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation. For each statement on this page check one box to show how important that reason is to you when considering such a trip.

	Very Important	Somewhat Important	Not very Important	Not at all Important
Getting away/escaping from the demands of home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a clean, healthy environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying a relaxing atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coming home with exciting travel stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a place my friends would love to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surrounded by beautiful, unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing as much as possible in the time available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing first hand what I learned in school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a modern culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing aboriginal culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roughing it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in active outdoor sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying alpine (downhill) skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying in accommodation unique to that country (e.g. guest ranch, lodge, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in one area to experience how local people live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling in a group tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling secure and safe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a wide, spacious outdoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a different country's healthy lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in the home of a resident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a local supermarket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to try different cuisines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting and interacting with local people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying the convenience of the modern world while experiencing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a wide selection of activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bringing the family together	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing an exciting environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying at luxury surroundings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting historical attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

RANDOMIZE ORDER OF DESTINATION LIST

	United States	Canada	Australia	South East Asia	Not Applicable
Getting away/escaping from the demands of home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a clean, healthy environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying a relaxing atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coming home with exciting travel stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a place my friends would love to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surrounded by beautiful, unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing as much as possible in the time available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing first hand what I learned in school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a modern culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing aboriginal culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roughing it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in active outdoor sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying alpine (downhill) skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying in accommodation unique to that country (e.g. guest ranch, lodge, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in one area to experience how local people live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling in a group tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling secure and safe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a wide, spacious outdoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a different country's healthy lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in the home of a resident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a local supermarket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to try different cuisines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting and interacting with local people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying the convenience of the modern world while experiencing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a wide selection of activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bringing the family together	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing an exciting environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying at luxury surroundings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting historical attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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- 22) How interested are you in visiting United States, Canada, Australia or South East Asia (ROTATE DESTINATION) in the next two years? (Please select one only)

	United States	Canada	Australia	South East Asia
Very Interested	<input type="checkbox"/> 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat Interested	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Very Interested	<input type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all Interested	<input type="checkbox"/> 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(PN: PROGRAMMING: FOR NEXT QUESTION SHOW COUNTRIES WITH CODES 4 OR 3.)

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

	United States	Canada	Australia	South East Asia
Definitely Will Visit	<input type="checkbox"/> 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Likely	<input type="checkbox"/> 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat Likely	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Very Likely	<input type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all Likely	<input type="checkbox"/> 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely Will Not Visit	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 24a) (IF CODES 2 OR 1 FOR CANADA IN Q. 22 ASK) Is Canada a country that you would like to visit some day, even if it is not in the next 2 years?

Yes ☐
No ☐ SKIP TO Q.26

- 24b) (IF CODES 4 OR 3 FOR CANADA IN Q. 22 OR 'YES' IN Q.24A ASK) Thinking about a future pleasure trip to Canada, please check the one box which best describes how far along you are in planning/booking that trip.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Still just dreaming about it	Seriously considering a trip to Canada in the next 2 years	Have started to gather information about Canada from friends, the internet, articles or brochures	Currently planning the details of my itinerary for a trip to Canada	In the process of working out the details of flight and land arrangements while in Canada	Already booked my flight

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

Season		
January – March	<input type="checkbox"/>	1
April – June	<input type="checkbox"/>	2
July – September	<input type="checkbox"/>	3
October – December	<input type="checkbox"/>	4
Type of Tour		
Group tour	<input type="checkbox"/>	1
Non-group (immediate party only)	<input type="checkbox"/>	2
(IF GROUP TOUR) Would you prefer:		
All days organized with the group, or	<input type="checkbox"/>	1
Many free days on your own	<input type="checkbox"/>	2
(IF NON-GROUP) Would you:		
Buy air, accommodation, etc. as part of a package, or	<input type="checkbox"/>	1
Buy air, accommodation, and other components separately	<input type="checkbox"/>	2
Would Also Visit Overnight or Longer (ALLOW MORE THAN ONE ANSWER)		
U.S.A.	<input type="checkbox"/>	
Other countries	<input type="checkbox"/>	
Provinces Likely to Visit (Please check all that apply)		
British Columbia (includes Vancouver, Victoria and Whistler)	<input type="checkbox"/>	1
Alberta (includes Calgary, Edmonton, Banff, and Jasper)	<input type="checkbox"/>	2
Saskatchewan (province)	<input type="checkbox"/>	3
Manitoba (province)	<input type="checkbox"/>	4
Ontario (includes Ottawa, Toronto and Niagara Falls)	<input type="checkbox"/>	5
Quebec (includes Montreal and Quebec City)	<input type="checkbox"/>	6
Nova Scotia (Atlantic Canada)	<input type="checkbox"/>	7
New Brunswick (Atlantic Canada)	<input type="checkbox"/>	8
Prince Edward Island (Atlantic Canada)	<input type="checkbox"/>	9
Newfoundland and Labrador (Atlantic Canada)	<input type="checkbox"/>	10
Yukon Territory (Northern Canada)	<input type="checkbox"/>	11
Northwest Territories (Northern Canada)	<input type="checkbox"/>	12
Nunavut (Northern Canada)	<input type="checkbox"/>	13
Preferred type of accommodation for one or more nights on trip (MAXIMUM 3).		
Mountain resort	<input type="checkbox"/>	
Seaside resort	<input type="checkbox"/>	
Lakeside resort	<input type="checkbox"/>	
Ski resort	<input type="checkbox"/>	
City hotel	<input type="checkbox"/>	
On a farm	<input type="checkbox"/>	
On a ranch	<input type="checkbox"/>	
B&B (bed & breakfast)	<input type="checkbox"/>	
Coastal cruise ship	<input type="checkbox"/>	
Canadian spa	<input type="checkbox"/>	
Authentic wilderness cabin or lodge	<input type="checkbox"/>	
Camping	<input type="checkbox"/>	
Caravan/motor home	<input type="checkbox"/>	
Home of friend or relative	<input type="checkbox"/>	
Participate in any of the following activities (RANDOMIZE)	Yes	No
Downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
Snowmobiling	<input type="checkbox"/>	<input type="checkbox"/>
Helicopter skiing	<input type="checkbox"/>	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>	<input type="checkbox"/>
Sports fishing	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Trail riding on horseback	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>	<input type="checkbox"/>
Seeing modern architecture	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing French Canadian culture and cuisine	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Taking a garden or flower tour	<input type="checkbox"/>	<input type="checkbox"/>
Observing wildlife in their natural environment	<input type="checkbox"/>	<input type="checkbox"/>
Viewing mountains	<input type="checkbox"/>	<input type="checkbox"/>
Viewing rivers or waterfalls	<input type="checkbox"/>	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Viewing autumn leaves	<input type="checkbox"/>	<input type="checkbox"/>
Viewing aurora borealis (Northern lights)	<input type="checkbox"/>	<input type="checkbox"/>
Taking a wine/culinary tour	<input type="checkbox"/>	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>	<input type="checkbox"/>

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Taking a rail tour	<input type="checkbox"/>	<input type="checkbox"/>
Visiting small towns	<input type="checkbox"/>	<input type="checkbox"/>
Visiting friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>
Attending festivals or fairs	<input type="checkbox"/>	<input type="checkbox"/>
Attending rodeos	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful beaches and coastlines	<input type="checkbox"/>	<input type="checkbox"/>
Seeing old architecture	<input type="checkbox"/>	<input type="checkbox"/>
Visiting world heritage sites	<input type="checkbox"/>	<input type="checkbox"/>
Visiting casinos	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
Taking city tours	<input type="checkbox"/>	<input type="checkbox"/>
Taking nature tours	<input type="checkbox"/>	<input type="checkbox"/>
Other activities (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

Travel in Canada between centres by any of the following:

Air	<input type="checkbox"/>	<input type="checkbox"/>
Rental car	<input type="checkbox"/>	<input type="checkbox"/>
Motor coach	<input type="checkbox"/>	<input type="checkbox"/>
Motor home/camper	<input type="checkbox"/>	<input type="checkbox"/>
Rail	<input type="checkbox"/>	<input type="checkbox"/>
Private car	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

Duration in Canada _____ nights [1 to 999]

(IF CODES 5, 4 OR 3 FOR CANADA IN Q. 23 SKIP TO Q.27A)

26. Some people are very interested in visiting Canada, yet have decided to put the trip off to a later year. From your personal point of view, how important are each of the following factors, if at all, in preventing you from travelling to Canada in the next 12 months. [RANDOMIZE LIST UNDER EACH HEADING]

	Extremely Important	Very Important	Fairly Important	Not Very Important	Not at all Important
Insufficient information or knowledge about:					
• Where to go in Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• What there is to do besides seeing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Types of accommodation available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Cultural activities available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Nightlife and entertainment options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Restaurants, bars and clubs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• What deals are available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Where to get information on the internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concerns about:					
• The weather	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Not being able to speak the language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Safety in Canadian nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Country too vast for a one or two week holiday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• The cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Lack of convenient flight to Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Distance between accommodation and nature based activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Greenhouse gas emissions due to air travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Questionnaire

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ASK EVERYONE

27a) To what extent do you agree or disagree with the following statement?

It is very important to me that I take action on a daily basis to reduce my impact on the environment by adopting environmentally-friendly measures such as recycling, conserving water.

Strongly agree ☐
Agree ☐
Neutral ☐
Disagree ☐
Strongly disagree ☐

27b) Thinking about the environment, some countries are making considerable effort to be more environmentally responsible, while other countries are much slower to react. When choosing a travel destination, how important to you is a destination's record on the treatment of its environment? Would you say it is:

Extremely important, ☐
Very important, ☐
Fairly important, ☐
Not very important, or ☐
Not at all important? ☐

27c) How would you rate the following countries as an environmentally responsible destination? Using a scale of 1 to 10 where "10" means extremely good and "1" means extremely poor, or any number in between. (ROTATE COUNTRIES)

	Extremely Good	9	8	7	6	5	4	3	2	1	Extremely Poor	Don't Know
United States	10	9	8	7	6	5	4	3	2	1		<input type="checkbox"/>
Canada	10	9	8	7	6	5	4	3	2	1		<input type="checkbox"/>
Australia	10	9	8	7	6	5	4	3	2	1		<input type="checkbox"/>
China	10	9	8	7	6	5	4	3	2	1		<input type="checkbox"/>
United Kingdom	10	9	8	7	6	5	4	3	2	1		<input type="checkbox"/>

(PN: PROGRAMMING: ASK ALL RESPONDENTS)

DEMOGRAPHICS:

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

28) Do you have any close friends or relatives living in Canada at the present time? (Please select one)

Yes ☐
No ☐
Don't know ☐

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

1 person 1
2-3 people 2
4-5 people 3
6 or more people 4

(PN: PROGRAMMING: IF CODE 1 SKIP TO Q.31)

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

1 person 1
2 people 2
3 people 3
4 people 4
5 people 5
6 or more people 6
None 7

31) What is your marital status? (Please select one)

Married or living with someone ☐
Single ☐
Divorced / separated ☐
Widow / widower ☐
Prefer not to answer ☐

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

Student 1
Semi or unskilled manual worker (e.g., manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant). 2
Skilled manual worker (e.g., skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, AA patrolman, pub/bar worker, etc.) 3
Supervisory or clerical / junior managerial / professional / administrative (e.g., office worker, student doctor, foreman with 25+ employees, salesperson, etc.) 4
Intermediate managerial / professional / administrative (e.g., newly qualified (under 3 years) doctor, solicitor, board director in small organization, middle manager in large organization, principle officer in civil service/ local government) 5
Higher managerial / professional / administrative (e.g., established doctor, solicitor, board director in a large organization (200+ employees), top level civil servant/public service employee) 6
Self-employed 7
Employed part-time 8
Housewife/husband 9
Unemployed 10
Retired / Semi-retired 11
Other 12
Prefer not to answer 99

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

Less than secondary school ☐
Secondary school ☐
A levels/AS levels/Scottish
Highers/GNVQ/BTEC ☐
Undergraduate degree or equivalent ☐
Postgraduate degree or equivalent ☐
Prefer not to answer ☐

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34) Which of the following categories best describes your gross annual household income before taxes in 2006? Please include all wages, salaries, pensions and income from other sources. Please choose one answer that applies. (does this change based on the country? YES)

Less than £20,000 ☐
£20,000 - £24,999 ☐
£25,000 - £29,999 ☐
£30,000 - £39,999 ☐
£40,000 - £49,999 ☐
£50,000 - £69,999 ☐
£70,000 or more ☐
Prefer not to answer ☐

THANK YOU



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U.K. Travel Trade Interview

Organization: _____

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

Name: _____

Title/Position: _____

Proportion of Long Haul to Short Haul Business: _____

Current Perceived Trends in the U.K. Travel Market

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

- Destinations
- Travel retailing.

- 1) Thinking over the past few years, what trends or changes have you seen in the long-haul travel market in terms of destinations? For example, are some countries becoming more popular and are some becoming less? If so, which ones? (Assess trends with Canada.)

- 2) Have consumer needs changed in any way? PROBE ON MORE EXPERIENTIAL TRIPS, INTERESTS OR ACTIVITIES, PLANNING/BOOKING LEAD TIMES, PARTY COMPOSITION, ETC

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

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- 4) Have the products or packages available changed over the past few years—including the kinds of experiences travelers are seeking, duration, etc? If so, in what way?

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

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

Canada's Image vs. Competitors

Objective: this section is to understand the trade's perceived competition set for Canada and its image.

- 7) Who are Canada's main competitors among other long-haul destinations? Why? (ONCE THE RESPONDENT HAS HAD A CHANCE TO GIVE THEIR OPINION THEN PROBE SPECIFICALLY ON THE FOLLOWING COUNTRIES: EUROPE GENERAL, UNITED STATES, CHINA, ASIA, MIDDLE EAST, AUSTRALIA/NEW ZEALAND).

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- 8) In your opinion, are these a different set of competitors from a few years ago or the same? If different, why? (AGAIN DRILL DOWN ON ABOVE MENTIONED COUNTRIES)

- 9) What are Canada's **strengths/advantages** over competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC AND ATTACHED TO THE COMPETING COUNTRY)

- 10) What are Canada's **weaknesses/disadvantages** compared to competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC TO THE COMPETING COUNTRY)

- 11) What kind of Brand Image do you think Canada **should have** as a pleasure destination? What aspects should it promote about itself?

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- 12) What are your current attitudes towards U.S. travel and its products? Have they changed over the past few years? Are they likely to change in the near future? (ASSESS IN WHAT WAY THESE PERCEPTIONS ARE RUBBING OFF ON CANADA IN EITHER A POSITIVE OR NEGATIVE WAY)

Travel Products

The objective of this section is to gather impressions that the trade has about travel products.

- 13) On what basis do U.K. people choose their vacation products or packages? What is the relative importance of price, itinerary, accommodations, destination appeal, convenience, availability of flights, good food, safety, shopping opportunities, reputation, etc.? Can you rank or prioritize those for me? (PROBE SPECIFICALLY IF ANY CHANGES HERE HAVE AFFECTED TRAVEL TO CANADA) Have there been any changes?

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



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- 15) What are the most desired or popular travel products or packages for Canada that U.K. people are buying? In other words, what are they asking for? Detail independent vs. group tour, duration of trip, places visited, main activities. Obtain wholesale/agent brochures and mark on them the most popular products. (ASSESS IF THEY ARE STILL CONSIDERED TO BE CURRENT AND ATTRACTIVE OR HAVE THEY BECOME LESS RELEVANT AND ATTRACTIVE)

- 16) To what degree do you encourage travel to all or any of the regions in Canada? (PROBE BRITISH COLUMBIA, ALBERTA, NORTHERN TERRITORIES, PRAIRIES, ONTARIO, QUEBEC, ATLANTIC CANADA)

- 17) How is the profile of your Canada destined clients different from those destined to other long-haul destinations, if at all? (LOOK FOR DEMOGRAPHIC DIFFERENCE – e.g. AGE, INCOME, EDUCATION, FAMILY STATUS, ETC. PROBE FOR CHANGES IN ANY OF THE TARGETS)

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New Product Ideas

- 18) What kinds of vacations should Canada now be offering to attract either existing or new targets. (Details independent vs. group tour, duration, places visited, main activities.) (MAKE SURE THE FEEDBACK IS SPECIFIC, THIS IS A VERY IMPORTANT QUESTION.)

- 19) What travel packages or products are available to other destinations that would be ideal for Canada? Can we get an idea for new packages for Canada from them? (Detail destinations and relevant package details. Obtain brochures where possible and mark the key vacation product opportunities.) (MAKE SURE THE FEEDBACK IS VERY SPECIFIC)

Travel Barriers

Objective: To uncover the trade's perceptions of barriers and weaknesses in selling Canada.

- 20) What are the major barriers or weaknesses holding people back from vacationing in Canada? (Obtain details, probe why and how to resolve.) (For example, if airline capacity is an issue, determine details on desired frequency, timing, and to what cities.) What complaints have you heard from clients? Barriers could include airline capacity, pricing, lack of knowledge, lack of packages, destinations choice issues, activity issues, accommodation issues, loss of "wow" factor.)



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- 21) What specific problems have you experienced in selling Canada? Can you provide suggestions on anything Canada can do to overcome these weaknesses or barriers?

- 22) General interest in Canada as a dream vacation is very high – often at the top of the list. Yet, the number of travellers actually going to Canada is relatively small. Why is that? What is holding people back? What are they afraid of?

Trade Support

Objective: to understand the areas where the trade needs additional or more support in selling Canada.

- 23) What can Canadian travel industry do to improve its marketing in the U.K.? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC. PROBE DEEPLY)

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- 24) Specifically
i Assistance for the trade (RECORD DETAILS)

- ii Product development? (RECORD DETAILS)

- iii What key marketing messages/themes would you suggest to sell Canada to potential travelers from the U.K.? (RECORD DETAILS)

- 25) What would be your top 3 recommendations for the Canadian tourism industry to increase tourism from the U.K.?

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26) How much contact do you have with Canadian officials regarding increasing travel to Canada? What is the nature of this contact? What do you think they could do to help raise holiday travel? What could they do to help you raise holiday travel to Canada?

27) Do you have any comments on the Canadian Tourism Commission? Please be honest in your comments. Your concerns, suggested improvements, or complaints would be very valuable to us.

i Any complaints?

iii What is it doing right?

iii Ways it could improve its service to you?

iv Do you receive office e-mail correspondence from the Canadian Tourist office? Is it effective? How could it be improved?

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28) Are the brochures they provide to trade effective? Can you show me any outstanding brochures for other countries that are really effective? (ATTEMPT TO OBTAIN A COPY)

29) Do you have any other comments or questions?

THANK YOU

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European Discussion Guide – Prospective Visitors



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European Discussion Guide Prospective Visitors

1. Background and Introduction (10 min)

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

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

Background on Respondents

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

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Moderator Instruction:

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

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

Ask for:

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

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

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

- I would like you to take a look at these sheets of travel logs we have created and tell me if you can identify or see any kinds of patterns. (For example: certain types of travel depending on the year or, certain places that are popular depending on the time of year, etc.).
- Determine if:
 - Some patterns exist and why.
 - Some destinations are becoming more or less popular and why.
 - Interests in travel are changing, in other words peoples' interests in the type of holiday/vacation they take have changed (example: more sun or mini breaks).
 - New types of packages or offerings have emerged.

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European Discussion Guide – Prospective Visitors

2. Buy Cycle/ Behaviour Analysis (25 min)

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Moderator: Write the Buy Cycle Model on the board/ sheets for discussion.

- Here are the steps that many people tell us they go through when planning a trip overseas. REVIEW WITH GROUP
- Do you agree with this as a general model? Shall we modify it in some way? MODIFY AS APPROPRIATE

TRAVEL PLANNING BUY CYCLE

Step 1--AWARE: You first hear about the destination.

Step 2--ON DREAM LIST: It becomes a destination that you dream about going to some day in the future, not necessarily in the immediate future.

Step 3--ON CONSIDER LIST FOR NEAR FUTURE: Now you are thinking about going there in the next year or two. Something made you want to go there very soon.

Step 4--CHECK OUT TRIP VIABILITY: You start to gather information on the basic parameters—is it doable, is it affordable, how much time do I need, how long is the flight, will the trip be enjoyable?

Step 5--CREATING A "VACATION MOVIE" IN YOUR HEAD: This is where you really start your serious investigation. Trying to get an idea of specifically what you would be doing during the day, in the evening, whether there will be enough to do, reassuring yourself that this will be a truly memorable experience.

Step 6--PUTTING TOGETHER THE FINAL VACATION: This involves choosing the right package, or working out the details of flights and land arrangements at the destination.

Step 7--BUYING THE TICKET OR PACKAGE: This is the final planning step—committing to the trip.

Buy Cycle For Competitive Destination

- Now, let's talk about your one of your recent trips overseas (Moderator—for each respondent, pick one of Canada's key competitors, not Canada itself)
- For each step:
 - What actually happened to get you to that stage?
 - What/who were the influencers (e.g. media, friends, etc)?
 - What sources of information did you use?

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- For example, how did the destination get on your **dream list** as a place to visit sometime in the future?
 - What were the main influences—something you saw on television (what specifically)? A friend's advice (what did they say specifically)? Something you read?
- What made you feel comfortable enough to go on to the next stage?
 - What had you learned about the destination that motivated you to want to go to the next stage?
 - What was really appealing to you at this point?
 - What feelings or emotions did you have?
- **Moderator—capture very specific detail on influencers, source of information, destination appeals and feelings at each step**
- **Summarize** what the key influencers, sources of information, appeals and feelings at each step to move the traveler through the decision process.
- What are the most important media to promote a destination at each stage?

3. Buy Cycle For Canada

- Let's talk about Canada on the same Buy Cycle Model.
- Where are you now personally—at what step?
- What got you to that point? Probe all the influencers.
 - What sources of information got you there (probe or each step up to that point)?
 - What did you learn from that information about Canada that got you there?
- Why have you not moved farther?
 - Where are the bottlenecks?
 - What are the barriers?
 - What are your concerns? Your fears?
 - What information is missing that would allow you to move on?
 - What emotions are missing to make you want to go now?

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European Discussion Guide – Prospective Visitors

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4. Explore Free Association (In-Depth) Outbound Trips (15 min)

- I would like to do an interesting exercise with you on two destinations:
 - Canada
 - Other competing destination
- It is a type of free association, it is a way for us to write down as many thoughts, feelings, and associations with a particular destination. Here is an example that has been generated ahead of time. (Go through the example quickly to show how one association can branch off in a variety of ways, show how the mindmap captures thoughts as well as feelings, how both positives and negatives can emerge, and how symbols or drawings can be used instead of words).
- Work with the group to get mind mapping thoughts on an easel or board.
- Review branches for Canada first (listen for patterns/repeats).
- What is the one branch that stands out for you?
 - Understand:
 - Importance
 - Significance
 - Meaning
 - Discuss countries strengths and weaknesses and overall image.

REPEAT FOR OTHER COMPETING COUNTRIES

5. Canada's Current Image (15 min)

The main objective is to understand current perceptions of Canada—strengths and barriers

- Let's talk more specifically about the appeals of Canada.
 - What would be the main reasons to go?
 - What does Canada offer that appeals to people like yourself?
 - How do you see a typical day on a Canadian vacation?
 - What specific activities would you like to participate in?
 - What specific things would you like to see?
- Now let's talk about the negative side.
 - What is holding you back?

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- Why do so many people have Canada on their dream trip list, but never get around to going?
- What are all the possible reasons for holding back/putting the decision off?
- Would there be enough to do? Enough to see?
- Or is it the stronger appeal of other destinations?
- If so, what does Canada lack that they have?

6. Picture Sort (10 min)

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

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

7. Creating The Ideal Trip (15 min)

- I have some brochures on vacationing in Canada.
- I'd like each of you to work with this material and create an ideal vacation experience.
- Use the pictures that we previously looked at and the brochures as references and write down the details for your ideal trip on the paper provided
 - We need to know specifically where in Canada you would travel
 - In what season
 - For how long you would be away
 - What activities you would do in each place—whether active or simply sightseeing
 - Whether you would want to be involved in any hobbies or special interests you have personally
 - What you expect to be the most memorable highlights of the trip—especially stories that you would tell when you return home

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European Discussion Guide – Prospective Visitors

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- Summarize:
 - What types of trips are most appealing?
 - Have your impressions of a vacation in Canada changed in any way after reviewing this material? In what way and why?
- Do these brochures address the kinds of vacations you are looking for?
 - Do they provide the kind of information needed to entice you?
 - Is there enough detail and imagery for you to create that "movie" in your head?
 - In what way are they inadequate?
 - What do they need to focus on to appeal to more people?
- Now that you have been through this detailed information, describe that your personal "movie" about a trip to Canada—what you visualize, where, how you are feeling.

8. 2010 Olympics (5 min)

- The 2010 Olympics are to be held in Vancouver, British Columbia
- Were you aware of that?
- Any interest in attending?
- Will you be watching the Olympics on television?
- How do you expect the Olympics to change or enhance people's image of Canada?



European Discussion Guide – Recent Visitors



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European Discussion Guide Recent Visitors

1. Background and Introduction (10 min)

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

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Background on Respondents

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

Moderator Instruction:

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

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

Ask for:

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

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

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

- I would like you to take a look at these sheets of travel logs we have created and tell me if you can identify or see any kinds of patterns. (For example: certain types of travel depending on the year or, certain places that are popular depending on the time of year, etc.).
- Determine if:
 - Some patterns exist and why.
 - Some destinations are becoming more or less popular and why.
 - Interests in travel are changing, in other words peoples' interests in the type of holiday/vacation they take have changed (example: more sun or mini breaks).
- New types of packages or offerings have emerged.

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2. Story Telling (15 min)

- Can you read us the stories that you wrote out in advance of the group about your trip to Canada?
- Are there any common activities or feelings here among all these stories?

3. Buy Cycle/ Behaviour Analysis (25 min)

Moderator: Write the Buy Cycle Model on the board/ sheets for discussion.

- Here are the steps that many people tell us they go through when planning a trip overseas. REVIEW WITH GROUP
- Do you agree with this as a general model? Shall we modify it in some way? MODIFY AS APPROPRIATE

TRAVEL PLANNING BUY CYCLE

Step 1--AWARE: You first hear about the destination.

Step 2--ON DREAM LIST: It becomes a destination that you dream about going to some day in the future, not necessarily in the immediate future.

Step 3--ON CONSIDER LIST FOR NEAR FUTURE: Now you are thinking about going there in the next year or two. Something made you want to go there very soon.

Step 4--CHECK OUT TRIP VIABILITY: You start to gather information on the basic parameters—is it doable, is it affordable, how much time do I need, how long is the flight, will the trip be enjoyable?

Step 5--CREATING A "VACATION MOVIE" IN YOUR HEAD: This is where you really start your serious investigation. Trying to get an idea of specifically what you would be doing during the day, in the evening, whether there will be enough to do, reassuring yourself that this will be a truly memorable experience.

Step 6--PUTTING TOGETHER THE FINAL VACATION: This involves choosing the right package, or working out the details of flights and land arrangements at the destination.

Step 7--BUYING THE TICKET OR PACKAGE: This is the final planning step—committing to the trip.

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Buy Cycle For Canada

- Now, let's talk about your recent trip to Canada
- For each step:
 - What actually happened to get you to that stage?
 - What/who were the influencers (e.g. media, friends, etc)?
 - What sources of information did you use?
- For example, how did the destination get on your **dream list** as a place to visit sometime in the future?
 - What were the main influences—something you saw on television (what specifically)? A friend's advise (what did they say specifically)? Something you read?
- What made you feel comfortable enough to go on to the next stage?
 - What had you learned about the destination that motivated you to want to go to the next stage?
 - What was really appealing to you at this point?
 - What feelings or emotions did you have?
- **Moderator--capture very specific detail on influencers, source of information, destination appeals and feelings at each step**
- **Summarize** what the key influencers, sources of information, appeals and feelings at each step to move the traveler through the decision process.
- What are the most important media to promote a destination at each stage?

Buy Cycle For Competitive Destination Trip

- Now, let's talk about your one of your recent trips to another long haul destination
- REPEAT ABOVE FOR RECENT TRIP. TRY TO COVER A RANGE OF COMPETITIVE DESTINATIONS

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4. Explore Free Association (In-Depth) Outbound Trips (15 min)

- I would like to do an interesting exercise with you on two destinations:
 - Canada
 - Other competing destination
- It is a type of free association, it is a way for us to write down as many thoughts, feelings, and associations with a particular destination. Here is an example that has been generated ahead of time. (Go through the example quickly to show how one association can branch off in a variety of ways, show how the mindmap captures thoughts as well as feelings, how both positives and negatives can emerge, and how symbols or drawings can be used instead of words).
- Work with the group to get mind mapping thoughts on an easel or board.
- Review branches for Canada first (listen for patterns/repeats).
- What is the one branch that stands out for you?
 - Understand:
 - Importance
 - Significance
 - Meaning
 - Discuss countries strengths and weaknesses and overall image.

REPEAT FOR OTHER COMPETING COUNTRIES

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5. Canada's Current Image (15 min)

The main objective is to understand current perceptions of Canada—strengths and barriers

- Let's talk more specifically about the appeals of Canada.
 - What would be the main reasons to go?
 - What does Canada offer that appeals to people like yourself?
 - How do you see a typical day on a Canadian vacation?
 - What specific activities would you like to participate in?
 - What specific things would you like to see?
- Now let's talk about the negative side.
 - Why do so many people have Canada on their dream trip list, but never get around to going?
 - What are all the possible reasons for holding back/putting the decision off?
 - Are they concerned about not enough to do? Enough to see?
 - Or is it the stronger appeal of other destinations?
 - If so, what does Canada lack that alternatives have?

6. Picture Sort (10 min)

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

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

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7. Creating The Ideal Trip (15 min)

- I have some brochures on vacationing in Canada.
- I'd like each of you to work with this material and create an ideal vacation experience.
- Use the pictures that we previously looked at and the brochures as references and write down the details for your ideal trip on the paper provided
 - We need to know specifically where in Canada you would travel
 - In what season
 - For how long you would be away
 - What activities you would do in each place—whether active or simply sightseeing
 - Whether you would want to be involved in any hobbies or special interests you have personally
 - What you expect to be the most memorable highlights of the trip—especially stories that you would tell when you return home
- Summarize:
 - What types of trips are most appealing?
 - Have your impressions of a vacation in Canada changed in any way after reviewing this material? In what way and why?
- Do these brochures address the kinds of vacations you are looking for?
 - Do they provide the kind of information needed to entice you?
 - Is there enough detail and imagery for you to create that "movie" in your head?
 - In what way are they inadequate?
 - What do they need to focus on to appeal to more people?
- Now that you have been through this detailed information, describe that your personal "movie" about a trip to Canada—what you visualize, where, how you are feeling.

8. 2010 Olympics (5 min)

- The 2010 Olympics are to be held in Vancouver, British Columbia
- Were you aware of that?
- Any interest in attending?
- Will you be watching the Olympics on television?
- How do you expect the Olympics to change or enhance people's image of Canada?



Recruiting Specs

July:

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London Focus Groups Recruiting Specifications

- There are two different focus group traveller **types** being recruited for this study.

- Type 1** **Past 3 year long-haul traveler, or planning to travel long-haul within the next 2 years, have never been on a vacation to Canada.**
- This person has either travelled for pleasure purposes outside of Europe, the Mediterranean and North Africa over the past 3 years or is planning to in the next 2 years.
 - They have not yet traveled to Canada.
 - Are not rejecters of Canada.

- Type 2** **Past 3 years traveller to Canada**
- Have visited Canada on a pleasure trip in the past 3 years.

- Below is the grid for the 6 groups.

Group 1	
Type:	2
Gender:	Male/Female
Age:	50-69
Group 2	
Type:	2
Gender:	Male/Female
Age:	30-49
Group 3	
Type:	1
Gender:	Female
Age:	30-49
Group 4	
Type:	1
Gender:	Male
Age:	30-49
Group 5	
Type:	1
Gender:	Male
Age:	50-69
Group 6	
Type:	1
Gender:	Female
Age:	50-69



Recruiting Specs

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Common Specs – Type 1

- All must be born in the U.K. or have lived in the U.K. for the past 5 years.
- Currently employed full time and above national average income earners. (FOR GROUPS WITH AGED 50-69, MAXIMUM HALF PER GROUP CAN BE RETIRED)
- **All have travelled outside of Europe, the Mediterranean and North Africa on a pleasure trip during the past 3 years for 4 nights or longer, or are seriously planning to do so within the next 2 years.**
- Gather a mix of destinations that include the U.S., Australia/New Zealand, Asia, etc.
- All must be very interested in visiting Canada in the next 3 years—via:
 - **An open-ended question:** ask respondents what destinations are they likely to visit on a pleasure trip outside of the U.K. in the next 3 years.
 - Canada must be mentioned voluntarily as a destination they are very likely to visit on a pleasure trip
 - **Ask if trip to Canada would be mainly to visit friends or relatives.** If so, limit to maximum 3 per group.
- **None** have actually taken a pleasure trip to Canada in the past.
- All must be the key decision makers within the household in choosing foreign pleasure destinations or share the responsibility equally with their partner.
- All must be personally involved with booking pleasure trips.
- Recruit 8 for 6 to show.

Common Specs – Type 2

- All must be born in the U.K. or have lived in the U.K. for the past 5 years.
- Currently employed full time (females can be part time or homemakers). (FOR GROUPS WITH AGED 50-69, MAXIMUM HALF PER GROUP CAN BE RETIRED)
- Household income must be above national average.
- **Have travelled to Canada within the past 3 years for 4 nights or longer for a pleasure trip.**
- **Primary motivator of at least one of those trip(s) to Canada was pleasure, not just to visit friends or relatives.**
- All must be the key decision makers within the household in choosing foreign pleasure destinations or share the responsibility equally with their partner.
- All must be personally involved with booking pleasure trips.
- Recruit 8 for 6 to show.



European Forums

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European Forums

A. Past Visitors

<u>Day 1</u>	<u>Mine Knowledge</u> <ul style="list-style-type: none">♦ Provide exact details of your itinerary in the last trip to Canada.♦ What specific elements made it such an enjoyable trip?<ul style="list-style-type: none">♦ Lots of detail –e.g. at this hotel we did this, here we met these people, talked with locals, etc.
<u>Day 2</u>	<u>Build on Great Experience</u> <ul style="list-style-type: none">♦ Read each others comments.♦ Ask each other questions to clarify what the great experiences were and why.
<u>Day 3</u>	<u>Build Great Itineraries/Modules</u> <ul style="list-style-type: none">♦ Using that learning, let's build some great trip ideas.♦ Also, check out specific sites for each region (to be recommended) as input.
<u>Day 4</u>	<u>Build Great Itineraries/Modules Regionally</u> <ul style="list-style-type: none">♦ Build more itinerary modules specifically for each region (B.C., Alberta, Manitoba, Ontario, Atlantic Canada).
<u>Day 5</u>	<u>Reaction to Our Ideas</u> <ul style="list-style-type: none">♦ Reaction to our modules and ideas clients want checked out.



European Forums

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European Forums

B. Prospective Visitors

<u>Day 1</u>	<u>Current Plans</u> <ul style="list-style-type: none">♦ What parts of Canada do you want to visit?♦ What experiences are you looking for? Be specific on:<ul style="list-style-type: none">- things to see and do, feel, experience.
<u>Day 2</u>	<u>B.C. Great Itineraries/Modules</u> <ul style="list-style-type: none">♦ Read ideas from past visitor forums (to be inserted).♦ Go to suggested websites.♦ Build great itinerary modules.♦ Read each others comments♦ Refine your ideas on great trip modules in British Columbia.
<u>Day 3</u>	<u>Alberta Great Itineraries/Modules</u> <ul style="list-style-type: none">♦ Read ideas from past visitor forums.♦ Go to website.♦ Build great itinerary modules.♦ Read each others comments♦ Refine your ideas on great trip modules in Alberta.
<u>Day 4</u>	<u>Ontario Great Itineraries/Modules</u> <ul style="list-style-type: none">♦ Read ideas from past visitor forums.♦ Go to website.♦ Build great itinerary modules.♦ Read each others comments♦ Refine your ideas on great trip modules in Ontario.
<u>Day 5</u>	<u>Manitoba/Atlantic Canada Great Itineraries/Modules</u> <ul style="list-style-type: none">♦ Read ideas from past visitor forums.♦ Go to website.♦ Build great itinerary modules.♦ Read each others comments♦ Refine your ideas on great trip modules in Alberta/Atlantic Canada.

