

**European Segmentation Study**  
**Atlantic Summary**

**February, 2008**

*Prepared for:*

**Atlantic Canada Tourism Partnership**

## Table of Contents

---

<b>FOREWORD</b> .....	<b>3</b>
METHODOLOGY .....	4
REPORT LAYOUT.....	9
<b>KEY FINDINGS</b> .....	<b>11</b>
KEY FINDINGS .....	12
MARKETING CONSIDERATIONS.....	20
<b>FINDINGS IN DETAIL</b> .....	<b>21</b>
<i>Section 1: The Image of Canada</i> .....	22
<i>Section 2: Atlantic Canada Trip Characteristics</i> .....	40
<i>Section 3: Ideal Trip To Atlantic Canada</i> .....	54
<i>Section 4: Product Development Forums</i> .....	62
<i>Section 5: The Buy Cycle Model</i> .....	90
<i>Section 6: Breaking Down Buy Cycle Barriers</i> .....	106
<i>Section 7: The Travel Trade</i> .....	120

**Foreword**

---

## Methodology

---

The research was designed to meet 6 business goals of the Canadian Tourism Commission (CTC) and its partner including Tourism BC, Ontario Tourism Marketing Partnership, Alberta Tourism, Parks, Recreation and Culture, Travel Manitoba, Atlantic Canada Tourism Partnership, and Government of Yukon, Tourism and Culture.

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

This report focuses on the most relevant data for Atlantic Canada from the three European studies.

## Methodology

---

### Phase One: Review of Existing Data

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

Information of particular relevance to the existing research included:

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

### Phase Two: Long-haul traveller Focus Groups

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

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

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

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

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

## **Methodology**

---

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

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

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

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

Fifteen interviews in total were conducted in each market, including:

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

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

## Methodology

---

### Phase Four: Consumer Quantitative Survey

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

Respondents met the following criteria:

- Travelled outside of European Union countries, North Africa and the Mediterranean for 3 nights or more with at least 1 night in paid accommodation for pleasure or personal reasons, to visit friends and relatives or a trip that combined business and pleasure in the past 3 years, or
- Planned to take a pleasure trip outside of European Union countries, North Africa and the Mediterranean for 3 nights or more with at least 1 night in paid accommodation in the next 2 years.

An oversample was implemented among past travellers to Canada. This was achieved by screening the main panel fully for qualifying past Canadian travellers. The oversample of past travellers to Canada was then weighted down to the level in the cross-section survey.

The following chart shows regional destinations of the recent travellers to Canada.

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

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

## **Methodology**

---

### **Omnibus Survey**

In addition to the online survey, a telephone omnibus survey was conducted among 1,000 adults aged 18+ across the nation to obtain incidence and profile data of the past and future pleasure trip travellers. This provided a base from which to weight the online survey as required.

In this case, an age weight was applied to the online sample to reflect a more accurate distribution of past/future travellers among each age group.

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

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

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

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

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

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

## **Report Layout**

---

The report is laid out in the following sections:

### **Key Findings**

- ◆ This section highlights the most important findings for Atlantic Canada.

### **Marketing Considerations**

- ◆ What action the research suggests for Atlantic Canada is outlined here.

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

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

### **Section 2: Atlantic Canada Trip Characteristics**

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

### **Section 3: Ideal Trip to Atlantic Canada**

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

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

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

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

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

## **Methodology**

---

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

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

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

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

**Key Findings**

---

## **Key Findings**

---

### **Travel Product Review**

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

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

- ◆ Atlantic Canada is a minor yet significant destination for U.K. travelers. Nova Scotia, the most popular province, attracted 41,000 arrivals in 2006, 4.9% of total Canadian visitors.
- ◆ On average, they spend 6 nights in the region out of 13 in Canada. Very common is to visit Ontario, Quebec and/or Western Canada on the same trip.
- ◆ Only 39% are visiting friends and/or relatives, lower than among visitors to many other provinces. Clearly, current visitors are inspired by the vacation benefits of Atlantic Canada.
- ◆ For the British visitor, rounding out their primary focus of observing nature are other common interests—experiencing local culture, interacting with local people and visiting historic sites, museums and galleries.
- ◆ U.K. travellers tend to be far less adventurous than the Germans or French. While they want to see and feel true nature, they also want to keep one foot solidly planted in an urban setting which provides security, a chance to socialize, cultural attractions, good food and accommodation.
- ◆ This need for a balanced vacation dictates how Atlantic Canada should be positioned – the opportunity to experience Canadian cities and towns, its people and culture, as well as true nature all within the same area.
- ◆ The majority of U.K. visitors are FIT (94%), half no package, half on an FIT package. Consequently, many are likely creating their own customized itineraries.
- ◆ U.K. travelers prefer hotels or motels and often renting a car.
- ◆ High on the list of appealing attractions in the region are the historical significant of the region to the British past (the far flung destination of sailors in centuries past), regional culture, cuisine and beautiful scenery—Bay of Fundy, Cabot Trail, the birds and cliffs of Newfoundland and Labrador among them.

## **Key Findings**

---

- ◆ Clearly a barrier to an east coast vacation is a general lack of awareness and a belief among many that the coast will not be that different from what is available in many parts of the U.K. It will be essential to clarify with prospects how unique the region really is.

### **Germany**

- ◆ Atlantic Canada is also a minor destination for German travelers. Nova Scotia, the most popular province, attracted 21,300 in 2006, 7.1% of German arrivals to Canada.
- ◆ However, German visitors are typically travelling to multiple regions – particularly Ontario, Quebec and/or Western Canada. Hence, Atlantic Canada is only one stop on a much wider tour – averaging only 5 nights out of 16 in Canada.
- ◆ The implication is that Germans need to be convinced that the east coast is a very exciting and interesting destination on its own and easily accessible through Halifax.
- ◆ The prime interest of the German tourist is to get out into open spaces, authentic nature and to experience small town living.
- ◆ B&B's, wilderness lodges, cottages/cabins and farm vacations all have significant appeal since they facilitate those desires.
- ◆ The majority of German travellers to Atlantic Canada are FIT (92%) and typically not on a package (58%). Renting a car is of great interest on future trips so their product flexibility is quite broad.
- ◆ Reviewing Atlantic Canada websites for the online forums, German travellers became excited about immersing themselves in the region—renting a car and driving, sampling excellent and varied seafood, sighting whales and seeing both small towns and exceptional scenery.
- ◆ As with the U.K. market, awareness of these attractions is very low, and, as discussed later, directing prospects to regional websites is essential.

## Key Findings

---

### France

- ◆ The French market has an overwhelming preference for Quebec (81% of Canadian arrivals stay overnight in that province). Atlantic Canada attracts a small share of travelers at the present time—New Brunswick only 5,000 visitors, Nova Scotia 5,200 in 2006.
- ◆ On average, the French visitors to Atlantic Canada spend only 2 nights in the province out of 14 in Canada.
- ◆ The main interest of the French in Canada is to get close to the life of French Canadians – to feel their way of life which they perceive as a reflection of their own past – where French people lived close to and in harmony with nature.
- ◆ This French connection is so powerful that other provinces, including Atlantic Canada, would do well to focus on the opportunity to see first hand evidence of early French settlers or the routes of French voyageurs through the province. The French have an insatiable appetite to feel that presence.
- ◆ However, beyond the historical factor, the French want to see wonderful scenery and the beauty of nature. The east coast has many spectacular natural attractions that can appeal to French visitors.
- ◆ As with the other European markets, promoting the fact that Atlantic Canada is so close and ideal for a unique trip to Canada would be an important point to focus on.

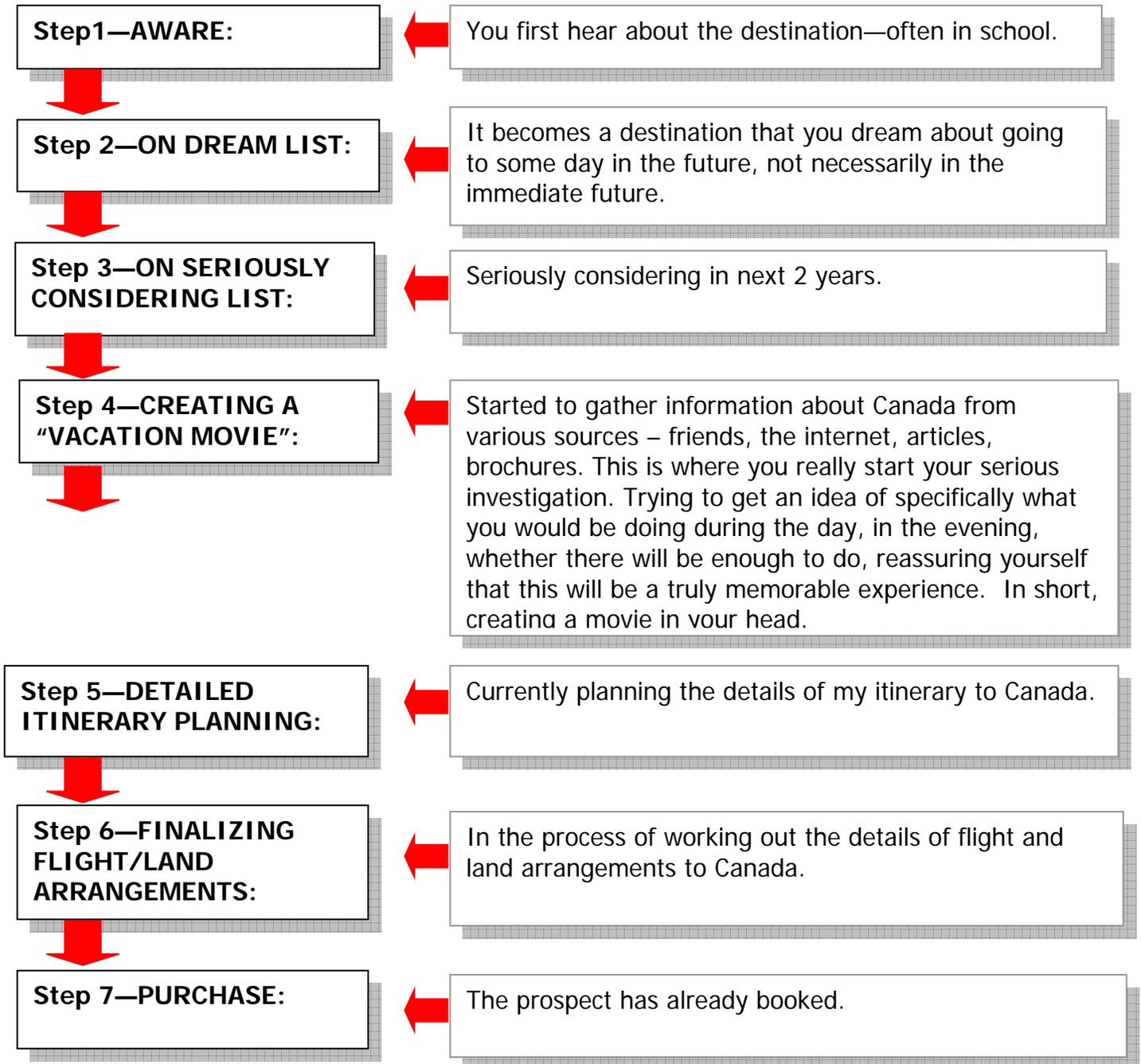
## Key Findings

---

### Breaking Down The Buy Cycle Barriers

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

The Buy Cycle Model is a 7-step process.

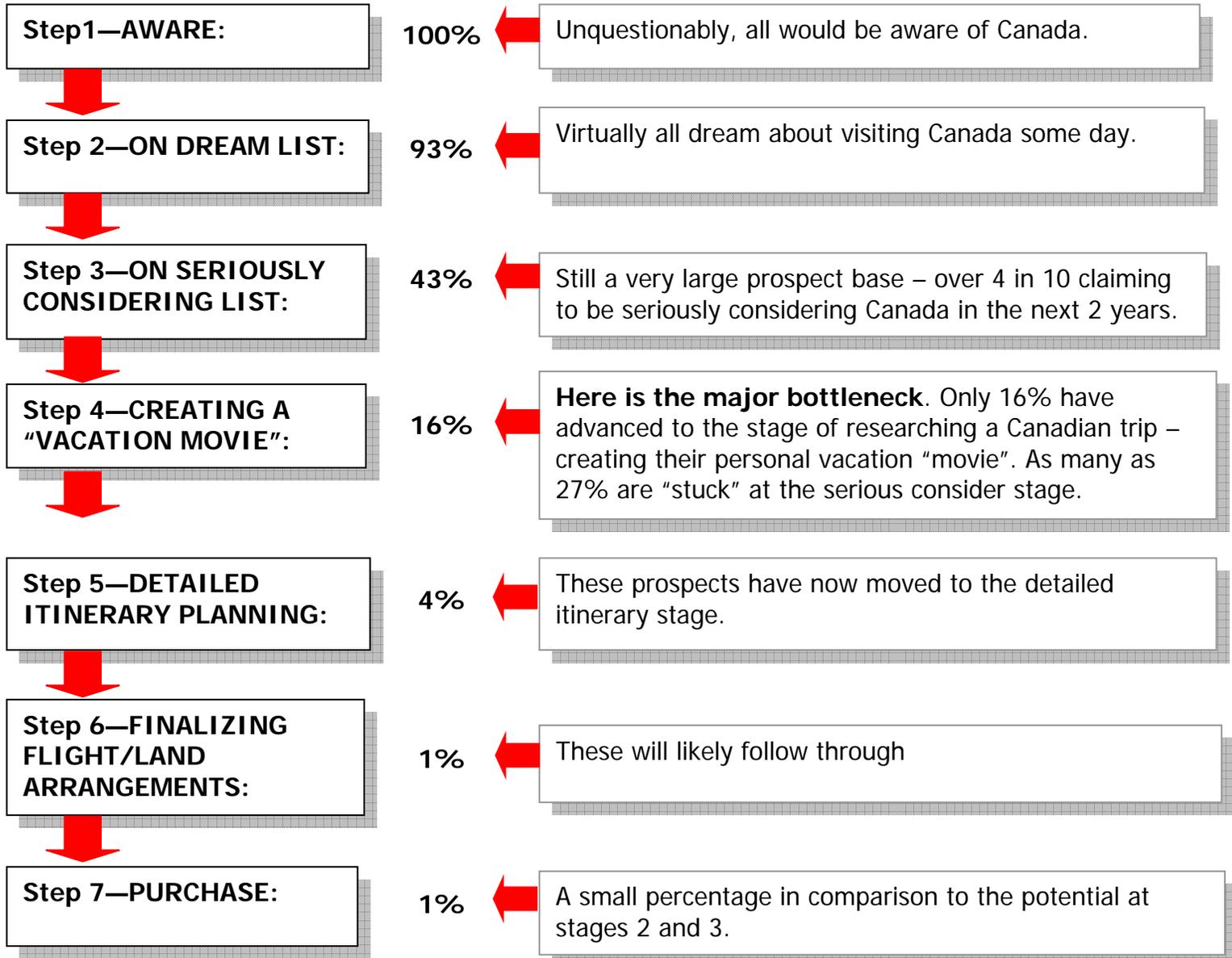


## Key Findings

---

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

### European Markets



## **Key Findings**

---

### **The Ideal Movie**

The ideal movie includes very specific parameters:

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

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

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

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

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

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

Clearly, they need:

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

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

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

## Key Findings

---

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

Two sites provided by Atlantic Canada were rated. The novascotia.com site was considered exceptional, the canadaeastcoast.com in serious need of reworking if it is to appeal to the European market and their need to create a "movie" from a base of little knowledge of the region.

### Criteria:

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

### Rating scale:

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

Web Site	Criterion				
	1	2	3	4	5
Atlantic Canada Travel   Atlantik Kanada Reise   La côte Est du Canada. <a href="http://www.canadaeastcoast.com/">http://www.canadaeastcoast.com/</a>	E	P	P	P	N
novascotia.com - Nova Scotia's Official Tourism Website   Visit Canada's Atlantic Coast. <a href="http://novascotia.com/en/home/default.aspx">http://novascotia.com/en/home/default.aspx</a>	E+	E	E	E	N

## **Key Findings**

---

### **Comments on Specific Sites**

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

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

### **The Travel Trade**

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

## **Marketing Considerations**

---

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

1. Encourage the industry to redesign their websites to specifically make it easy for prospective visitors to create their own “movie”.
2. Once the websites are at their optimal design, engage in advertising and promotion to drive prospects to those websites. This may involve partnering with the CTC, creating links between sites and ensuring high presence on word search engines. It must be remembered that the internet is more a tool for planning, not a source of destination inspiration. Hence, prospects need to be reached through a broader campaign to encourage website visits.
3. Position Atlantic Canada in advertising and promotion to reflect the core needs of each origin market:
  - U.K.** – Atlantic Canada is easy to reach, closer than America. Relive the history of past British sailors, settlers and pirates, experience a unique culture, friendly people and grand nature.
  - Germany** – Atlantic Canada is easy to reach, offers an opportunity to truly explore real nature, authentic small towns, unique culture, cuisine and friendly people.
  - France** – Experience Atlantic Canada’s incredible nature and the reconnect with the life of early French settlers throughout the region.
4. Encourage the industry to create 2 to 7 day excursions (packages or itinerary ideas) to different parts of the region that can be chosen once landing in Halifax by FIT travellers.
5. Promote how close the region is to Europe, how short the flight really is. Then, encourage carriers to offer low cost flights.

**Findings in Detail**

---

**Section 1: The Image of Canada**

---

## 1.1 Introduction: Arrivals To Atlantic Canada

---

Atlantic Canada attracts a small share of Canadian arrivals from Europe.

The weakest origin market among the 3 below is France. However, as discussed later, there are opportunities to tap into this market which is primarily destined to Quebec.

Clearly, the U.K. is the major source of visitors, about double the German visitors.

	<b><u>U.K.</u></b> #	<b><u>France</u></b> #	<b><u>Germany</u></b> #
<b><u>Arrivals to Atlantic Canada</u></b>	<b><u>842,000</u></b>	<b><u>361,000</u></b>	<b><u>298,000</u></b>
Arrivals to Newfoundland*	4,700	400	2,300
◆Share of Canada arrivals	0.6%	0.1%	0.8%
Arrivals to PEI*	14,000	400	4,300
◆Share of Canada arrivals	1.7%	0.1%	1.4%
Arrivals to Nova Scotia*	41,000	5,200	21,300
◆Share of Canada arrivals	4.9%	1.4%	7.1%
Arrivals to New Brunswick*	14,600	5,000	9,400
◆Share of Canada arrivals	1.7%	1.4%	3.2%

\*Overnight stays—2006 Statistics Canada

## 1.2 U.K. - 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

### 1.3 U.K. – 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.
- ◆ Their trip concept is not properly balanced.
  - ◆ *"Tell us what there is to do"*
  - ◆ *"When we think of Australia we think of great diversity of things to do. But, we don't know about Canada"*
  - ◆ *"What do you do in-between the cities? How far apart are they"?*
  - ◆ *"Canada is so vast, I didn't know where to start" (i.e. putting a doable vacation concept together)*
  - ◆ *"What's missing is excitement, art, culture, places of interest"*
  - ◆ *"East competes with West – how do I make a choice"?*

## 1.4 U.K. – The Ideal Positioning

---

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

## 1.5 U.K. – Implications For Atlantic Canada

---

European travelers need an iconic focal point within Atlantic Canada in order to get it on their serious consider list. Without a world famous waterfall or mountain range, the region must come up with a different strategy.

Based on the response in the forums, discussed later, viable strategies could be:

- **An historical focus**—the far flung destination of British sailors in centuries past. A land rich in history that is so relevant to the British
- **A cultural treasure chest**—the British love culture and the wide array of unique music, festivals, museums and historical sites should appeal to them. Even stay overnight in a lighthouse.
- **Grand nature**—one will not miss out on Canada’s grand nature. Atlantic Canada has incredible scenery and natural experiences—from the Bay of Fundy to the shores of Newfoundland and Labrador.

Given their need for urban comfort, a reminder of the first class accommodation and opportunities to stay, dine and socialize in a comfortable urban setting should be reinforced.

Another key selling proposition is how close the region is to the U.K.—a relatively short flight from London to Halifax.

## 1.6 France – The Appeal of Canada

---

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

## 1.6 France – The Appeal of Canada

---

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

## 1.7 France – Beyond Quebec

---

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

## 1.8 France – The Barriers To Canada

---

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

## 1.9 France – The Ideal Positioning

---

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

## 1.10 France – Implications For Atlantic Canada

---

Although the focus of the French is on Quebec, Atlantic Canada should be able to attract more French travelers—either as an extension to their trip to Quebec or as a dedicated destination for repeat travelers.

Although the French want to connect with their French “cousins” and way of life in Canada, they are also great explorers and highly interested in nature.

The key selling proposition in this market should be:

- **Atlantic Canada’s incredible nature experiences**—again from the Bay of Fundy to the ruggedness of Newfoundland and Labrador.

However, layered onto this should be the French history of the region and the opportunity to connect with the life of early French settlers throughout Atlantic Canada.

As with the British market, the closeness of the region and its accessibility to France should be emphasized. If the French can be made to think about the region as a relatively short (ideally inexpensive) flight, the greater the chance they will be open to a dedicated Atlantic Canada vacation.

As discussed later, in the forums there was a good deal of interest in visiting Boston first then adding on a trip to Canada’s east coast. This is another opportunity worth building on with package deals and inexpensive flights.

## 1.11 Germany – The Appeal of Canada

---

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

## 1.12 Germany – The Barriers To Canada

---

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

### 1.13 Germany – The Ideal Positioning

---

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

## **1.14 Germany – Implications For Atlantic Canada**

---

As mentioned the Germans love getting out into nature and smaller Canadian towns. As one Atlantic Canada tour operator said “the Germans don’t get excited until they get out into small towns of say 300 people where they can feel and see an “authentic” lifestyle, so different from Germany today.

Clearly, the Germans need to know about the real life experiences that are available in Atlantic Canada.

Beyond friendly people and their lifestyle the Germans are highly interested in incredible nature. It is not surprising that there is so much interest in Newfoundland and Labrador (discussed later), but they also need to be made aware of the unique natural experiences available in the Maritimes as well.

Beyond nature and meeting the people, Germans are intrigued by unique cultural experiences ( especially aboriginal), appreciate good quality accommodation and food available in an urban setting.

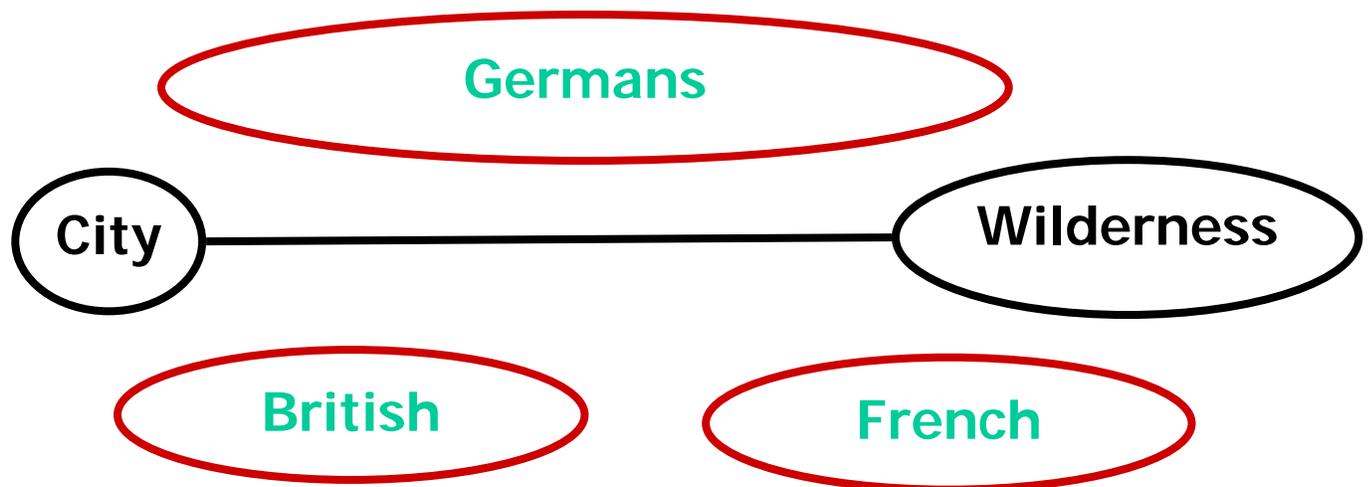
As avid motor home travelers, the region is ideal for German explorers.

As with the other two markets, a reminder of how close the region is to Europe would help solidify the appeal of a dedicated trip to Atlantic Canada.

## 1.15 Canada's Image: Summary

---

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



## 1.15 Canada's Image: Summary

---

### 1. Positioning Pitfalls to Avoid

<u>DO's</u>	<u>DONT's</u>
<ul style="list-style-type: none"><li>◆ Demonstrate vibrant cities on the edge of nature</li><li>◆ Visitors can enjoy both outdoor experiences and urban comforts virtually on the same day</li><li>◆ Feature unique nature experiences on one hand (e.g., icons, plus snowmobiling, dog sledding, openness, vistas, etc.)</li><li>◆ Feature unique cultural experiences (e.g., aboriginal, Canadian urban culture, meeting locals, log cabins, B&amp;B's, etc.)</li><li>◆ Re-enforce the availability of comfort (e.g., good food, accommodation, socializing, etc.)</li></ul>	<ul style="list-style-type: none"><li>◆ Overly emphasize Canadian cities<ul style="list-style-type: none"><li>◆ Too much like 1,000's of other cities around the world</li><li>◆ For the French and Germans treat them as gateways. Both want to get away from cities</li></ul></li><li>◆ Show too much remote wilderness<ul style="list-style-type: none"><li>◆ Europeans are intimidated by remoteness, bears – too scary.</li></ul></li><li>◆ Use images that would be considered cliché—not unique to Canada</li></ul>

## **Section 2: Atlantic Canada Trip Characteristics**

---

## 2.1 Regions Visited

U.K. visitors have a particular fondness for Nova Scotia. German and French visitors do as well, but they have been more keen on taking in Newfoundland/Labrador.

Those who currently visit only Atlantic Canada are an anomaly. Note the popularity of including other regions of Canada as well on the same trip.

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102)</b> %	<b>(142)</b> %	<b>(140)</b> %
<b><u>Other Canadian Regions Visited</u></b>			
<u>Western Canada (net)</u>	<u>47</u>	<u>72</u>	<u>46</u>
British Columbia	45	63	37
Alberta	28	46	20
Saskatchewan	16	24	16
Manitoba	17	26	28
Yukon/NWT/Nunavut	59	81	58
<u>Eastern Canada (net)</u>	<u>100</u>	<u>100</u>	<u>100</u>
Ontario	<u>49</u>	<u>62</u>	<u>68</u>
Quebec	<u>47</u>	<u>63</u>	<u>86</u>
Atlantic	100	100	100
Nova Scotia	<u>74</u>	<u>57</u>	<u>48</u>
Newfoundland/Labrador	41	<u>54</u>	<u>50</u>
PEI	52	37	34
New Brunswick	43	35	46

Source: Quantitative Survey: Q.8b

## 2.2 Duration of Trip

Four to six nights in Atlantic Canada is the norm, out of 13 to 16 in Canada. The two targets for Atlantic Canada marketing in future should be to encourage visitors to Canada to spend more nights in the region and, secondly, to sell the visitors on an exclusive trip to Atlantic Canada, especially given the relatively short travel time.

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102)</b>	<b>(142)</b>	<b>(140)</b>
	<b>%</b>	<b>%</b>	<b>%</b>
<b><u>Duration (Avg)</u></b>			
<u>Total nights on trip</u>	<u>22.1</u>	<u>28.3</u>	<u>19.0</u>
Nights in Canada	13.3	15.9	14.0
Nights in Atlantic Canada	5.9	4.6	1.6
<b><u>Nights in Province</u></b>			
British Columbia	2.0	3.4	0.3
Alberta	1.1	1.3	0.7
Manitoba	0.3	0.6	0.2
Yukon	0.1	0.9	0.2
Ontario	1.9	2.4	1.6
Quebec	1.3	1.3	6.3
Atlantic	5.9	4.6	3.6
Other	7.0	1.2	1.1
<b>Total in Canada</b>	<b>13.3</b>	<b>15.9</b>	<b>14.0</b>

Source: Quantitative Survey: Q. 10d

## 2.3 Month of Travel

---

The summer is the preferred season, followed by the spring.

	Among Past 3 Years Visitors to <u>Atlantic Canada</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(102) %	(142) %	(140) %
<b><u>Month of Travel</u></b>			
January-March	13	15	15
April-June	(29)	(31)	(24)
July-September	(45)	(42)	(46)
October-December	13	13	15

Source: Quantitative Survey: Q.11

## 2.4 FIT vs. Group

Most visitors to Atlantic Canada are FIT, fairly evenly split between on a FIT package and no package.

Most travel with their spouse, only occasionally with children (14% to 19% of parties).

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102)</b>	<b>(142)</b>	<b>(140)</b>
	<b>%</b>	<b>%</b>	<b>%</b>
<b><u>FIT vs. Group</u></b>			
<b><u>Total FIT</u></b>	<b>94</b>	<b>92</b>	<b>77</b>
FIT – benefit package	46	35	41
FIT – no package	<b>46</b>	<b>58</b>	38
<b><u>Total Group</u></b>	<b>6</b>	<b>9</b>	<b>23</b>
<b><u>FIT vs. Group</u></b>			
Immediate party only	94	92	77
Part of larger group	6	9	23
<b><u>Party Composition</u></b>			
Spouse/significant other	<b>57</b>	<b>59</b>	<b>69</b>
Friends	17	15	10
Travelled alone	20	17	9
Children	14	19	17
Parents	8	5	5
Organized group/club	4	2	6
Other relatives	8	2	11
Business associates/colleagues	2	4	3

Source: Quantitative survey Q.12, 16

## 2.5 Accommodation

City hotels dominate, but notice the appeal of B&B's, wilderness lodges, cottages/cabins and farm stays among the French and Germans anxious to get as close as possible to "authentic" Canada.

The British favour more "civilized" accommodation.

	Among Past 3 Years Visitors to <u>Atlantic Canada</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(102) %	(142) %	(140) %
<b><u>Type of Accommodation</u></b>			
Mid-priced city hotel/motel	44	28	53
Luxury city hotel	27	25	28
Home of friend or relative	28	11	32
Budget city hotel	13	24	8
Resort hotel	17	26	8
Bed and breakfast	22	24	26
Authentic wilderness lodge	2	12	10
On a cruise ship	10	5	1
Cottage/cabin	9	14	15
Camping	6	4	8
On a farm	4	10	10
Guest ranch	6	9	4
Caravan/motor home	8	8	5
Other	5	1	5

Source: Quantitative Survey Q.18

## 2.6 Expenditure For Trip

U.K. travellers provided high marks for value for money, the Germans the lowest.

However, all country's visitors would strongly recommend to others to visit Canada – a solid endorsement.

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b>UK</b>	<b>Germany</b>	<b>France</b>
	<b>(102) %</b>	<b>(142) %</b>	<b>(140) %</b>
<b><u>Trip Expenditure</u></b>	<b><u>(£)</u></b>	<b><u>Error! Not a valid link.</u></b>	<b><u>Error! Not a valid link.</u></b>
Under 2,000	27	7	25
2,000-<4,000	24	25	34
4,000-<6,000	22	26	22
6,000-<8,000	17	16	10
8,000+	11	27	9
<b>Mean</b>	<b>£4,700</b>	<b>€7,100</b>	<b>€4,400</b>
<b><u>Value for Money</u></b>			
Excellent value	41	22	30
Very good value	33	33	36
Good value	19	40	26
Fair value	7	5	9
Poor value	-	1	-
<b><u>Recommended to Others</u></b>			
Definitely will	49	60	65
Very likely	35	28	27
Somewhat likely	8	11	8
Not likely	7	2	-

\*Less than 0.5%

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

## 2.7 Purpose of Trip – All Reasons

Nature is unquestionably the most important reason for travel. Overseas visitors need to have significant icons on which to focus to justify the long-haul trip.

However, beyond those key draws, most also want to round out the vacation experience with local culture, interacting with people, and seeing new places. These help to provide a more enriching, balanced vacation experience.

	Among Past 3 Years Visitors to Atlantic Canada		
	UK	Germany	France
	(102) %	(142) %	(140) %
<b>Purpose of Trip – All</b>			
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	65	79	83
To see new places	62	41	53
To experience local culture	49	43	37
To interact with the local people	41	52	62
To relax, unwind and decompress	34	22	37
To visit historic sites, museums, or galleries	43	42	37
To realize a long term dream	29	33	39
To visit friends and relatives	39	23	29
To visit protected areas, including nature reserve, regional or national parks	42	57	52
To view aboriginal sites and events	14	19	29
To see and watch wildlife	39	42	46
To go shopping	25	29	23
To experience big cities in another county	27	31	28
To be together as a family	24	14	20
Low rates, good deals, and discounts	19	11	6
To participate in outdoor activities	19	27	18
For entertainment and nightlife	24	17	16
To attend festivals and/or events	13	12	21
A trip that combined business with pleasure	13	16	15
Honeymoon	16	10	9
To visit a spa, health centre, or hot springs	14	9	4
To go downhill skiing or snowboarding	10	7	12
Other reason	5	6	4

Source: Quantitative Survey Q.9a

## 2.8 Activities Participated In – Top Ten

Once again visiting small towns, places of historical interest, taking city tours and seeing old architecture are all key activities to round out a vacation that is primarily focused on nature.

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102) %</b>	<b>(142) %</b>	<b>(140) %</b>
<b><u>Activities Participated In – Top Ten</u></b>			
Viewing rivers or waterfalls	73	70	84
Viewing mountains	72	62	77
Visiting small towns	67	74	78
Visiting places of historical interest	67	70	78
Taking city tours	66	76	83
Observing wildlife in their natural environment	62	72	76
Seeing beautiful beaches and coastlines	61	69	61
Visiting wilderness areas	61	71	79
Seeing old architecture	59	57	73
Getting to know the local inhabitants	58	71	82

## 2.8 Activities Participated In – Also Popular

	Among Past 3 Years Visitors to Atlantic Canada		
	UK	Germany	France
	(102) %	(142) %	(140) %
<b>Activities Participated In – Also Popular</b>			
Canoeing/kayaking/boating	26	40	35
Attending festivals or fairs	34	47	49
Staying at a luxury resort	26	31	24
Cycling	22	26	27
Taking wine/culinary tour	24	36	29
Taking a rail tour	34	30	25
Visiting casinos	24	31	23
Studying English	n/a	44	29
Visiting a spa	26	29	22
Whale watching	37	49	48
Viewing autumn leaves	38	45	39
Sport fishing	26	27	26
Attending professional sporting events	32	20	23
Camping in a natural setting	30	30	16
Trail riding on horseback	18	38	18
Visiting hotsprings	20	44	17
Viewing glaciers	23	51	32
Viewing Aurora Borealis (Northern Lights)	20	31	18
Golfing	16	28	12
Dog sledding	18	29	24
Attending rodeos	14	28	19
Downhill skiing or snowboarding	19	26	16
Heli/cat skiing	16	29	16
Hunting	18	17	15
Visiting museums or art galleries	57	51	68
Visiting friends or relatives	57	39	53
Fine dining	51	53	76
Seeing modern architecture	49	41	74
Visiting world heritage sites	47	47	64
Trekking in a nature area	44	69	68
Attending theatres, clubs or shows	43	46	38
Taking nature tours	41	78	81
Sunbathing or other beach activities	32	38	41
Taking a cruise	32	19	56
Taking a garden or flower tour	26	60	54
Aboriginal cultural experiences, celebrations, and attractions	26	34	50

Source: Quantitative Survey Q.19a

## 2.9 Trip Inspiration

Friends and relatives are the most common source of information. Television travel shows and destination travel guides or even news stories all contribute to helping the visitor paint a picture of a visit and build on their initial enthusiasm.

The internet is a widely used planning tool, but less as a source of initial inspiration.

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102) %</b>	<b>(142) %</b>	<b>(140) %</b>
<b><u>All Source of Inspiration for Trip Planning</u></b>			
Friend or relative	52	33	48
Television travel shows	20	30	22
The internet	24	26	24
Destination travel guide	21	28	17
Saw a film on destination	12	17	9
Travel agent/tour operator	10	4	15
Story in magazine or newspaper	13	21	18
Other television show	13	10	8
Business reasons	12	4	3
Consumer travel trade show	8	3	6
Direct mail or email advertising	13	9	7
A news story	9	11	26
Celebrity travelled there	10	8	2
<b><u>Close Friends/Relatives in Canada</u></b>			
Yes	57	33	41
No	43	66	57

Source: Quantitative Survey Q.14a, 28

## 2.10 Horizons

---

European visitors plan their trips 5½ to 7 months in advance, booking 3½ to 5 months in advance.

	<b>Among Past 3 Years Visitors to <u>Atlantic Canada</u></b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102) %</b>	<b>(142) %</b>	<b>(140) %</b>
<b><u>Planning Horizons</u></b>			
Average # of weeks	37.9	47.8	39.2
<b><u>Booking Horizons</u></b>			
Average # of weeks	20.8	14.3	18.9

Source : Quantitative Survey Q.15a,b

## 2.11 How Trip Was Booked

U.K. travellers are becoming very comfortable booking direct with an airline (57%). The French and Germans still appreciate the reassurance of an agent.

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(102) %</b>	<b>(142) %</b>	<b>(140) %</b>
<b><u>How Trip Was Booked</u></b>			
<u>Booked through a travel agent/package provider (net)</u>	<u>40</u>	<u>50</u>	<u>56</u>
In person	27	29	37
Online	7	17	13
Via phone	14	6	11
<u>Airline (net)</u>	<u>57</u>	<u>38</u>	<u>37</u>
Via their website	49	26	24
Via phone, email or in person	14	13	14
<u>Hotel (net)</u>	<u>35</u>	<u>24</u>	<u>18</u>
Via their website	31	18	17
Via phone	9	6	5
Other online travel supplier	7	5	12
Other	3	5	10
<b>Online Bookings (net)</b>	<b>93</b>	<b>66</b>	<b>65</b>

## 2.12 Traveller Profile

European visitors are quite young (50%+ under 40, 70%+ under 50).

	<b>Among Past 3 Years Visitors to Atlantic Canada</b>		
	<b>UK (102) %</b>	<b>Germany (142) %</b>	<b>France (140) %</b>
<b>Age</b>			
18-29	25	30	29
30-39	28	28	21
40-49	20	21	28
50-59	13	7	11
60+	15	14	11
<b>Gender</b>			
Male	52	54	54
Female	48	46	46
<b>Marital Status</b>			
Married/living together/de-facto	80	72	75
Single	16	25	18
Divorced/widowed/separated	4	3	6
<b>Household Composition</b>			
Adults only	58	53	47
With children <18	42	47	53
<b>Occupation</b>			
<b>Total employed</b>	<b>69</b>	<b>81</b>	<b>65</b>
Senior unskilled manual worker	4	5	2
Skilled manual worker	10	14	5
Supervisory or clerical/junior managerial/professional/administrative	19	14	15
Intermediate managerial / professional /administrative	23	10	21
Higher managerial / professional/ administrative	8	16	16
Self employed	3	17	3
Employed part time	2	5	2
Student	8	8	6
Housewife/husband	4	3	4
Retired/semi-retired	16	3	11
Other	1	4	10

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

### **Section 3: Ideal Trip To Atlantic Canada**

---

### 3.1 Ideal Trip to Atlantic Canada

---

Those who would include Atlantic Canada on their ideal trip to Canada describe their future trip in this section.

The preferred season of travel is the summer, followed by the fall.

Average duration in Canada: 14 to 18 nights.

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(663) %</b>	<b>(683) %</b>	<b>(930) %</b>
<b><u>Ideal Next Trip</u></b>			
<b><u>Season</u></b>			
January-March	8	4	9
April-June	26	26	28
July-September	50	60	41
October-December	17	10	22
<b><u>Duration</u></b>			
# of nights (avg)	15.0	17.8	13.6

Source: Quantitative Survey Q.25

### 3.2 Provinces Likely to Visit

Newfoundland and Labrador is the province that captures the greatest interest among German and French travellers.

The U.K. puts Nova Scotia ahead, but Newfoundland/Labrador still out pulls the other maritime provinces handily.

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(663) %</b>	<b>(683) %</b>	<b>(930) %</b>
<b><u>Provinces Likely to Visit</u></b>			
B.C.	62	59	38
Alberta	32	30	16
Saskatchewan	16	17	12
Manitoba	15	17	14
Yukon	21	31	20
North West Territories	21	26	27
Nunavut	12	15	15
Ontario	60	61	60
Quebec	48	58	86
Nova Scotia	60	31	41
Newfoundland and Labrador	48	68	69
PEI	33	33	28
New Brunswick	22	25	23
<b><u>Would Also Visit Overnight or Longer</u></b>			
USA	52	47	39
Other countries	17	28	10
Canada only	41	40	54

Source: Quantitative Survey Q.25

### 3.3 Type of Tour

---

Most would travel FIT, split between FIT package and no package.

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(663) %</b>	<b>(683) %</b>	<b>(930) %</b>
<b><u>Type of Tour</u></b>			
<u>Group Tour</u>	<u>14</u>	<u>19</u>	<u>25</u>
Prefer: All days organized	6	10	16
Many free days	8	9	9
<u>FIT (non-group)</u>	<u>86</u>	<u>81</u>	<u>75</u>
Prefer: Package	(39)	(38)	(39)
Non-Package	(47)	(43)	(36)

Source: Quantitative Survey Q.25

### 3.4 Transportation

---

Air is clearly a logical inter city mode choice, but note the high interest in rental cars and in train travel.

Whenever possible, product should include a rail segment.

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(663)</b> %	<b>(683)</b> %	<b>(930)</b> %
<b><u>Transportation Between Centres</u></b>			
Rental car	64	79	76
Air	81	68	74
Rail	78	61	65
Motor coach	38	46	54
Private car	27	21	29
Motor home/camper	27	44	14

Source: Quantitative Survey Q.25

### 3.5 Accommodation

U.K. visitors gravitate to Canadian resorts – mountain, lakeside or seaside.

German and French travellers express particular interest in B&B's, ranch stays and wilderness lodges – all an effort to experience Canada at a grassroots level.

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(663)</b> %	<b>(683)</b> %	<b>(930)</b> %
<b><u>Accommodation</u></b>			
City hotel	35	29	33
Authentic wilderness cabin or lodge	23	21	29
Bed and Breakfast	17	29	28
Lakeside resort	41	33	24
On a ranch	9	27	21
On a farm	5	2	14
Home of friend or relative	7	7	8
Seaside resort	20	34	11
Mountain resort	47	14	11
Canadian Spa	9	10	7
Coastal cruise ship	8	5	4
Ski resort	10	4	3
Caravan/motor home	7	13	2
Camping	2	4	1

Source: Quantitative Survey Q.25

### 3.6 Activities – Top Ten

All European visitors want to balance their time spent in nature with culture and community experiences – visiting small towns, places of historical interest, getting to know the local inhabitants, and taking city tours.

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<b><u>UK</u></b>	<b><u>Germany</u></b>	<b><u>France</u></b>
	<b>(663) %</b>	<b>(683) %</b>	<b>(930) %</b>
<b><u>Activities – Top Ten</u></b>			
Viewing rivers or waterfalls	91	94	96
Viewing mountains	88	84	88
Visiting small towns	83	87	93
Observing wildlife in their natural environment	83	87	91
Visiting places of historical interest	82	87	87
Visiting wilderness areas	81	89	91
Getting to know the local inhabitants	77	86	94
Seeing beautiful beaches and coastlines	77	89	73
Visiting world heritage sites	76	76	86
Taking city tours	75	88	90

### 3.6 Activities – Also Popular

	<b>Among Those Who Would Include Atlantic Canada On Their Ideal Trip</b>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	<b>(663)</b> %	<b>(683)</b> %	<b>(930)</b> %
<b><u>Activities – Also Popular</u></b>			
Attending rodeos	32	42	42
Cycling	28	43	41
Trail riding on horseback	42	41	41
Study English	n/a	54	35
Visiting friends or relatives	32	25	30
Sports fishing	15	16	29
Downhill skiing or snowboarding	26	18	24
Heli/cat skiing	20	15	26
Visiting casinos	20	16	18
Golfing	11	10	12
Hunting	13	10	11
Viewing Aurora Borealis (Northern Lights)	74	73	83
Whale watching	74	72	81
Experiencing French Canadian culture and cuisine	73	84	93
Taking nature tours	73	93	93
Seeing old architecture	73	72	78
Visiting museums or art galleries	67	62	62
Taking a rail tour	67	57	55
Attending festivals or fairs	60	64	62
Trekking in a nature area	58	81	82
Seeing modern architecture	57	56	61
Viewing autumn leaves	56	63	76
Aboriginal cultural experiences, celebrations, and attractions	52	80	87
Attending theatres, clubs or shows	51	53	44
Taking a wine/culinary tour	46	41	60
Taking a cruise	45	28	47
Visiting a spa	41	37	43
Dog sledding	38	50	79
Taking a garden or flower tour	34	69	64
Canoeing/kayaking/boating	34	45	50
Snowmobiling	32	38	64

Source: Quantitative Survey Q.25

**Section 4: Product Development Forums**

---

## 4.1 Introduction – Online Product Development Forums

---

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

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

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

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

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

## 4.2 General British Product Discussion

---

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

### *On Itineraries and Location*

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

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

*A route master map would be useful.*

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

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

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

## 4.2 General British Product Discussion

---

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

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

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

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

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

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

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

---

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

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

## 4.2 General British Product Discussion

---

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

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

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

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

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

---

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

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

## 4.2 General British Product Discussion

---

### ***On Skiing***

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

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

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

### ***On Food***

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

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

## 4.2 General British Product Discussion

---

### *Not pushed enough...*

Many respondents feel that Canada does not push itself enough.

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

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

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

### Options

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

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

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

---

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

## 4.2 General British Product Discussion

---

### *Creating Customers rather than Consumers*

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

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

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

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

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

### 4.3 Atlantic Canada Specifics for the UK

---

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 mythology (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.

### 4.3 Atlantic Canada Specifics for the UK

---

#### **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” Campaign<sup>6</sup> is an example of the start of such a campaign, but it is important to note that the [canadaeastcoast.com](http://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).

---

<sup>6</sup> <http://www.tasteofnovascotia.com/>

### 4.3 Atlantic Canada Specifics for the UK

---

#### ***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.<sup>7</sup> 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.

---

<sup>7</sup> 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.

### 4.3 Atlantic Canada Specifics for the UK

---

#### *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.

### 4.3 Atlantic Canada Specifics for the UK

---

#### *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”.

#### 4.4 General French Product Discussion

---

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

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

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

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

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

Some particular experiences were well appreciated:

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

#### 4.4 General French Product Discussion

---

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

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

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

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

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

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

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

#### 4.4 General French Product Discussion

---

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

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

The same respondent went on to say that:

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

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

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

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

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

Guided would include:

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

Transfer to Gaspé (2-4 days)

- Percé Rock, Bonaventure
- Mont Albert

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

Return via Quebec City to Montreal

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

#### 4.4 General French Product Discussion

---

##### Quebec → West - (2 weeks or 3)

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

Transfer to Ottawa/Hull (3-4 days)

- River Rouge (rafting) en route

- Museums

- Gatineau Park

Transfer to Toronto (3-4 days)

- CN Tower

Options:

- excursion to Grande River

- Niagara-on-the-Lake

- Toronto Islands, sailing

- Bruce Trail, hiking

Transfer to Niagara Falls (2 days)

Options for "more than just looking at it"

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

Return via boat through 1000 islands

Back to Montreal

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

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

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

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

## 4.5 Atlantic Canada Specifics for France

---

It proved harder to develop enthusiasm for a trip to the Atlantic Provinces, than to open up French tourists' minds to the possibilities of going to Ontario or the West. This may come down to their being nothing that they can instantly recognize in the Atlantic Provinces as being on a par with a "must-see" item like Niagara Falls or the Rockies.

Several comments were made that there is little expectation of "dépaysement" of the kind they would be hoping for when spending a lot of money and time on a trip to Canada. This means not being convinced that the Atlantic Provinces really warrant a journey on this scale, since they would not make them feel they were experiencing something totally different from a local trip – to Brittany, for example. Even the name "Nova Scotia" implied for one respondent "like going to Scotland", which could be accomplished easily on a long week-end.

Another point to be made here is that there was little evidence of serious interest in exploring French history and influence outside Quebec. People were polite about the idea – e.g. "Yes certainly, the Acadian villages" – but there was little obvious magnetism. This aspect should probably not be ignored, but it only deserves secondary status.

Nevertheless, some of the respondents were impressed by what they saw on websites. In particular, the views of the Cabot Trail, of Gros Morne, of the Newfoundland coast in general, and of the promise of the Aurora Borealis in Labrador – all this was new information for them, on a spectacular scale. It added up to something worth making out a special itinerary for.

There was also the allure of the sports opportunities. One of them felt motivated to cycle right around Nova Scotia, including the Cabot Trail. In a less adventurous way, others liked the idea of exploring the Atlantic Provinces by ferry, offering a variety of seascapes and places to explore after landfall.

These tourists were struck by the fact that the Atlantic Provinces were surprisingly varied: it was not just the Breton or the Scottish coast, it showed a range of surprisingly different views. This unexpected variety was important.

The bird and animal life was also noteworthy as a magnet. As in other parts of Canada, seeing a range of exotic fauna in the wild proved to be a significant attraction.

## 4.5 Atlantic Canada Specifics for France

---

Even more than in the West, there was a tendency to want to cram too much into a short week. One of them felt like covering four provinces (including Newfoundland and Labrador) in eight days.

### *Itineraries*

i) As an add-on to a trip to Quebec (7-8 days)

Arrive Halifax (2 days)

- Harbour tour (Bluenose?)
- Shopping (Historic Properties)
- Citadel

Transfer to Lunenburg via Peggy's Cove (1 day)

- Fisheries Museum

- Walk-around

Transfer to Digby (2 days)

- Whale watching expedition
- Transfer to Cape Breton (2 days)

- Cabot Trail experience (walking)

Return

ii) As an add-on: sports-orientated (7-8 days)

Arrive – Halifax (1 day)

Transfer to Baddeck (1 day)

- Bell Museum

- Cycle tour of Cabot Trail

2 days to Ingonish Beach

1 day in Cape Breton Highlands National Park → Chéticamp

2 days back the East side to Inverness

Transfer to Halifax

## 4.5 Atlantic Canada Specifics for France

---

N.B. In both (i) and (ii) seafood and wild game would be offered frequently.  
In (ii) the best sites for bird/animal observation would be visited

iii) Longer visit (2-3 weeks)

Arrive - Corner Brook/Deer Lake NFL

- 3 days excursions in Gros Morne National Park

Transfer - Happy Valley/Goose Bay\*

- 2 days excursions – helicopter over glaciers

Transfer – St-John's NFL (2 days)

- Explore city, Signal Hill

- Tour of Avalon

Transfer – Îles de la Madeleine (2 days)

- Excursions

Transfer – Sydney NS (4 days)

- Cabot Trail experience (alternatives: walking tours, cycling, horseback riding)

Transfer – Halifax (2 days)

- Shopping

- Sightseeing

Transfer – Digby (2 days)

- Whale watching expedition

Return via Halifax (1 day)

\* N.B.: If possible, timing should be geared towards optimum time to see Aurora Borealis and have reasonable weather.

## 4.6 General German Product Discussion

---

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

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

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

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

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

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

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

## 4.6 General German Product Discussion

---

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

### ***Road trips***

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

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

German respondents appear to have a love/hate relationship with road trips. The “love” part concerns the ability to travel as they will and to experience “authenticity” in their travels whether that be authentic nature or authentic people. The “hate” component shows up most clearly in concerns that their cars will break down and they won’t be able to get help.<sup>8</sup>

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

---

<sup>8</sup> It is somewhat inaccurate to refer to this as “hate” – it is really “fear”.

## 4.6 General German Product Discussion

---

### ***On Skiing***

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

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

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

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

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

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

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

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

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

## 4.6 General German Product Discussion

---

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

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

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

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

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

The sole major exception to this lack of knowledge about culture in Canada is in the area of Aboriginal culture. In Germany, there is a general fascination with “Indians”<sup>9</sup> and, while some respondents are not “into the Wild West”, many are fascinated with the “natives”.

---

<sup>9</sup> This fascination goes back well over 100 years. For example, there were “recreationist” “Indian” events in Bavaria in the 1880’s.

## 4.7 Atlantic Canada Specifics for Germany

---

The reactions to the Atlantic Provinces by the respondents was not overly enthusiastic, with several respondents viewing it as a small module rather than a full trip. For example:

*"I would plan to stay only for a week and combine this with a trip to the U.S. I would fly to Boston, stay there for 2-3 days and go for sightseeing there and after that fly to Halifax. From there, I would go on a three-day trip to Cape Breton and back to Boston and then to Germany."*

Why this should be is difficult to say, although it may have to do, in part, with Germany having very little maritime (ocean going) heritage. It is also possible that sheer ignorance is playing a large part in the decision. For example, one respondent who had not been to Canada before, said that:

*"I think, for this trip, I would plan with one week. Maybe it is possible to combine this trip with Toronto. I would like to do a little sailing trip of 2-3 days. After that I would rent a car and go all along the coast. I especially would like to see Nova Scotia and Newfoundland. Duration: 2-3 days as well. On this trip, I would eat as much seafood as possible because I am sure that the local cuisine is excellent there. If I am lucky, I have the possibility to see the northern lights of Labrador. Hopefully, I would have time for a whale watching trip as well. After that, I would travel to Toronto."*

Obviously, such an itinerary would be insane due to the distances and travel time involved. The respondent does, however, point to some of the specific draws of the area: seafood, northern lights and whale watching. This level of ignorance also showed up with another respondent who said that "I would book an organized trip with a tour operator", implying that they would be lost without such.

## 4.7 Atlantic Canada Specifics for Germany

---

A more realistic itinerary, also suggested by a respondent who hadn't been to Canada before, was this:

*"Flight to Halifax, duration: 3 weeks because there is lot's to see there. We would stop for sure in Nova Scotia, Sydney, Newfoundland and Labrador. Planed activities; Drive along the coast, visit national parks, sightseeing in cities. I wouldn't plan a special amount of days for every stop because there is so much to see, especially the beautiful landscape and coasts, so that this trip lives from spontaneity. I would decide short-run if I would like to stay longer or not, depending on what kind of areas I like there. I would rent a car and of course take the ferry. Seeing whales is self-evident as well."*

Again, we see whale watching as a major attraction although in this respondent's case it is combined with a road trip. The road trip option appeared to be very popular for viewing the Atlantic Provinces. Another example is:

*"I would plan 4 weeks of vacation here as well. We would fly from Frankfurt to Boston because my whole city loves this city. After a few days there, we would drive up north by rented car. Because there are no bigger cities in this part of Canada, we would just enjoy the landscape, stop wherever we like; our main destination would be Halifax. Because Halifax is pretty small, two days of sightseeing should be enough there. If time permits, we would stay for a few days on PEI to relax on the beach. From Halifax we would travel back south, stay a few days in New York and would fly back to Germany."*

Once again, we see the ties into the United States with the US viewed as "Urban" and Canada viewed as "Rural" (or "Nature"). What is also interesting about this example is that they actually do not name any activities or places in the Atlantic Provinces outside of Halifax.

One of the more interesting points about the road trip options is that not a single respondent commented on the small villages and music culture in Nova Scotia. Very few commented on seafood either. This indicates that a food/music road trip "caravan route" may well be a viable option as a product for German travelers. In particular, such a product needs to stress the "authenticity" of both the food and the life to act as an attractor to the German market.

## 4.7 Atlantic Canada Specifics for Germany

---

“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” Campaign<sup>10</sup> 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.

Several different itinerary suggestions would be appropriate 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

---

<sup>10</sup> <http://www.tasteofnovascotia.com/>

## 4.7 Atlantic Canada Specifics for Germany

---

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

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

---

## 5.1 The Buy Cycle Model

---

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

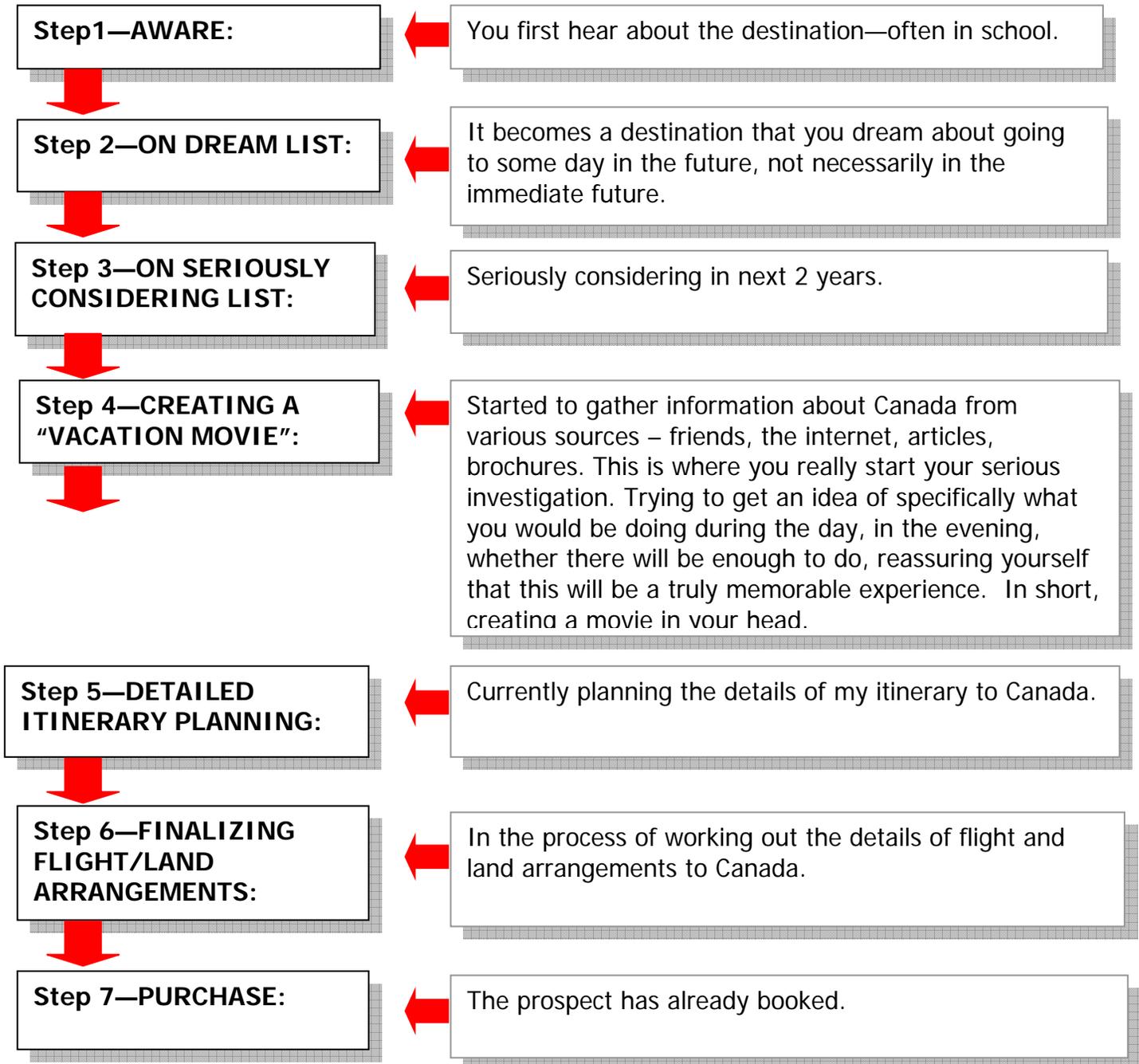
- The Buy Cycle Model was developed by Insignia during three separate tourism studies in China, Taiwan and South Korea examining in a real life environment the step by step planning process.
- The Buy Cycle was then subsequently evaluated in 18 focus groups in Europe-- the U.K., France and Germany. Those 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".

## 5.1 The Buy Cycle Model

---

### A) HOW IT WORKS

- The model is described below:



## 5.1 The Buy Cycle Model

---

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

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

#### **Step 1 – First Aware**

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

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

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

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

##### **Germany**

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

## 5.1 The Buy Cycle Model

---

### France

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

## 5.1 The Buy Cycle Model

---

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

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

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

## 5.1 The Buy Cycle Model

---

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

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

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

## 5.1 The Buy Cycle Model

---

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

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

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

#### **Germany**

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

#### **France**

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

## 5.1 The Buy Cycle Model

---

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

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

- Often on the net, but many use agents.

#### **Germany**

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

#### **France**

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

### **Step 7 – Purchased**

- The trip is now sold.

## 5.1 The Buy Cycle Model

---

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

- The process is fundamentally similar for Canada.

#### **Step 1 – First Aware**

- Typically learned about Canada in school.

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

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

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

##### **Germany**

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

## 5.1 The Buy Cycle Model

---

### France

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

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

### U.K.

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

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

## 5.1 The Buy Cycle Model

---

### Germany

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

### France

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

## 5.1 The Buy Cycle Model

---

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

#### U.K.

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

#### Germany

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

## 5.1 The Buy Cycle Model

---

### France

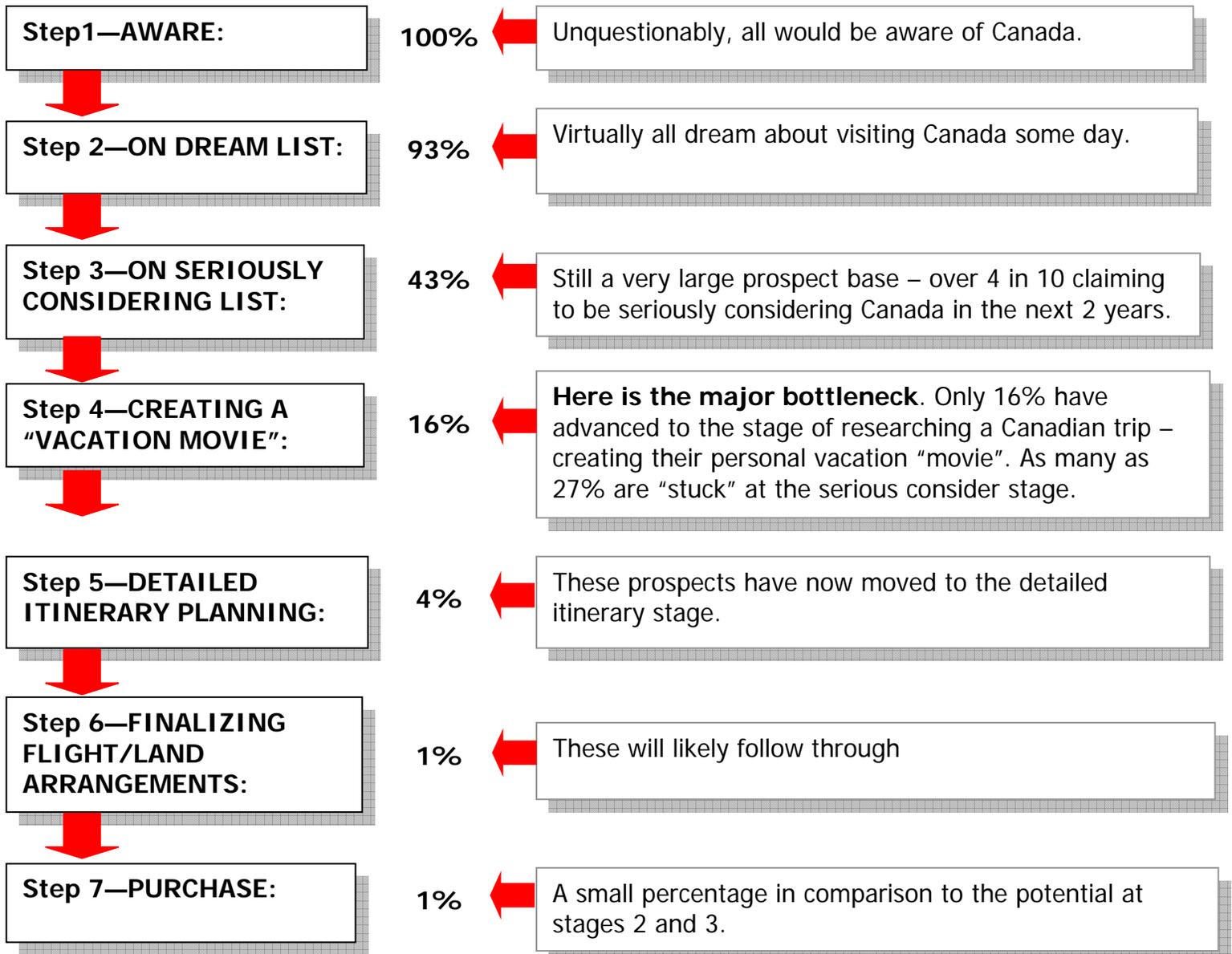
- *“Went to agency for tour information”*
- *“Guide du Boutard”*
- *“Michelin guide”*
- *“Looked at a map”*
- *“Search the net – click on pictures”*
- *“Read blogs”*
- *“Read novels on Canada”*
- *“Asked people who had been there”*

## 5.1 The Buy Cycle Model

### D) BOTTLENECKS AND BARRIERS – CANADA

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

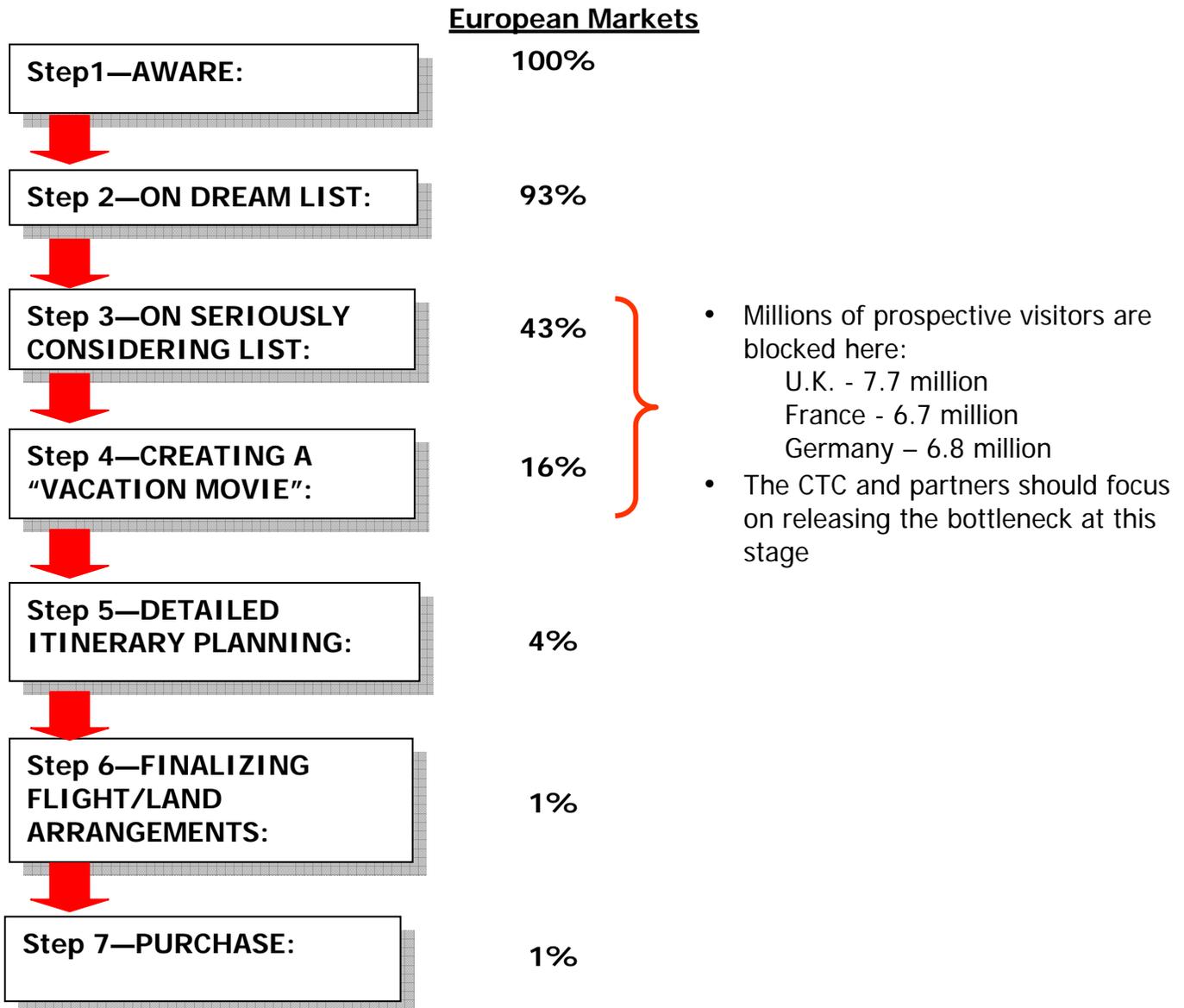
#### European Markets



## 5.1 The Buy Cycle Model

---

### E) PROJECTED MARKET SIZE



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

---

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

---

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

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

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

---

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

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

### 6.3 How Can Websites Be Enhanced?

---

Most official sites appear built for the North American market.

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

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

They need:

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

## 6.4 Provincial/Territory Website Evaluation

---

### Introduction

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

### Background Learning From Forums

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

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

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

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

---

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

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

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

### **Specific Web Sites**

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

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

### **Website Ratings**

#### **Criteria:**

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

## 6.4 Provincial/Territory Website Evaluation

### Rating scale:

E – Excellent, included in main navigation or front page

A – Acceptable, fairly simple to find

P – Poor, difficult to find

N – not available

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

## 6.4 Provincial/Territory Website Evaluation

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

## 6.4 Provincial/Territory Website Evaluation

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

### Comments On Specific Sites

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

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

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

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

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

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

## 6.4 Provincial/Territory Website Evaluation

---

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

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

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

This site did not really have any tourist information.

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

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

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

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

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

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

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

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

NB : Navigation links do not show properly in Firefox.

## 6.4 Provincial/Territory Website Evaluation

---

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

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

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

## 6.5 Summary

---

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

The [www.canadaeastcoast.com](http://www.canadaeastcoast.com) site needs to be revised significantly to work for the European market. However, the [www.novascotia.com](http://www.novascotia.com) site was one of the most highly rated.

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

---

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

Hence, CTC and its partners should continue advertising/promotional campaigns to drive highly serious prospects to their websites.

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

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

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

## **6.7 Influential Media**

---

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

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

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

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

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

---

## 7.1 The Evolution of The Travel Trade

---

### **Fact**

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

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

### **Implications**

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

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

### **Fact**

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

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

### **Implications**

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

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

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

---

### **Fact**

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

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

### **Implications**

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

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

## 7.2 New Product Must Be Brought to Market

---

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

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

- ◆ In other words, for the FIT visitor to 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.