

Germany Consumer and Travel Trade Research

Final Report



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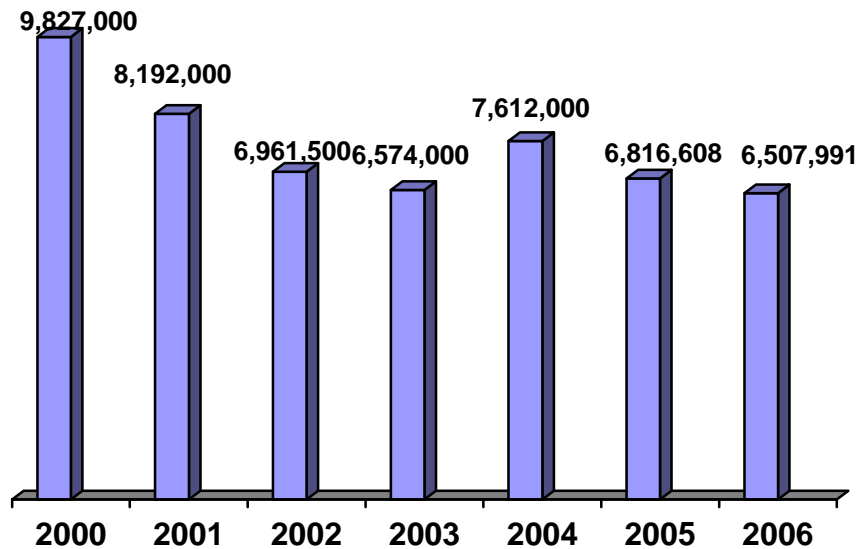
Foreword



Background

Germany's long-haul market experienced a 33.8% decline between 2000 and 2006, but most of the erosion was centred on 2001/2002 amid difficult times internationally. Since 2002, the market has remained relatively stable, but is still well under 2000 levels.

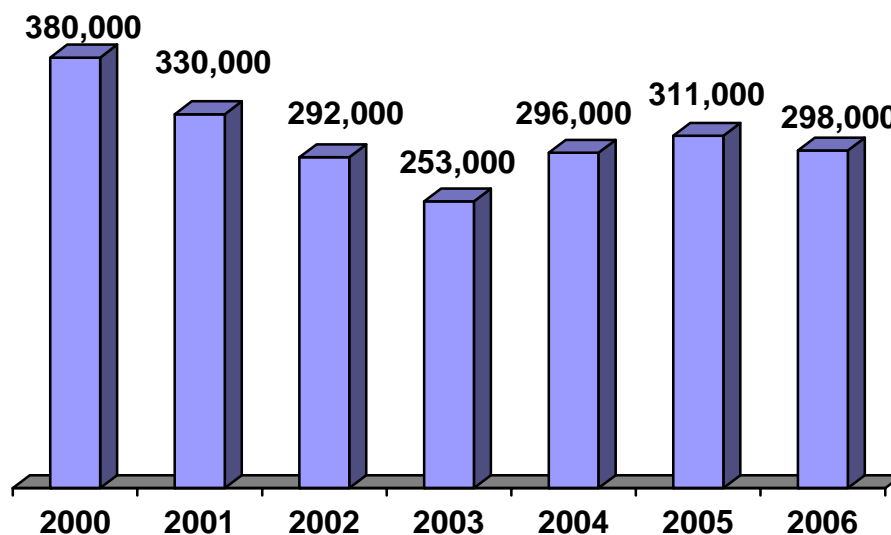
FOREWORD EXHIBIT 1: GERMAN LONG-HAUL TRIPS, 2000 TO 2006



Source: EuroStat

German arrivals in Canada are also down from 2000.

FOREWORD EXHIBIT 2: GERMAN TRIPS ARRIVING IN CANADA, 2000 TO 2006



Source: Statistics Canada



Background

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

This research must determine:

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

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

The specific business goals, can be summarized as follows:

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



Background

3. To make use of the most effective **communication channels** to reach the target market.
 - The internet
 - Advertising vehicles
 - Trade – agents/wholesalers
 - Other channels
4. To provide direction and **assistance for the travel trade** to accelerate the growth of pleasure travel to Canada.
5. To identify the **target segments** for travel to Canada.
 - Motivational/product segments
 - Demographic segments
6. To create market-sensitive **product packages**.
 - Most appropriate activity/interest focus
 - Most effective price points
 - Best packaging components (the correct type of accommodation, duration, ground activities, etc)



Research Objectives

The research was focussed on 8 primary areas:

a) Defining the Target Market

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

b) Global Segmentation

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



Research Objectives

c) Pinpointing The Triggers For Canada

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

d) What Are The Barriers To Visiting Canada

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



Research Objectives

e) Positioning Canada Effectively

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

f) Product Opportunities

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

g) Planning/Booking Process

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



Research Objectives

h) Travel Trade

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



Methodology

Phase One: Review of Existing Data

An examination of existing available data on 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 Euro vs. the currencies of major destinations

Phase Two: German 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 German travellers.

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

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



Methodology

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

Phase Three: In-depth Interviews with the Travel Trade

As a great deal of the CTC's activities in Germany 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 Germany.

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

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

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

- 5 Interviews with Tour Operators/Wholesalers
- 8 Interviews with Travel Agents/Retailers
- 2 Interviews with Canadian representatives in Germany

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

Phase Four: Consumer Quantitative Survey

A national online panel operated by OpenVenue was conducted with 2,548 German long-haul travellers aged 18 and older from October 24 to November 14, 2007.



Methodology

Respondents met the following criteria:

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

An oversample was implemented to reach n=692 past travellers to Canada.

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

The following chart shows regional destination of the 692 past travellers to Canada.

B.C.	n=349
Alberta	n=246
Saskatchewan	n=66
Manitoba	n=62
Ontario	n=392
Quebec	n=283
Atlantic	n=142
Yukon	n=77
Northwest Territories	n=72
Nunavut	n=34

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

The average error range with a sample of 2,548 is $\pm 1.9\%$. This means that in 19 out of 20 cases, the results based on a sample of 2,548 will differ by no more than 1.9% from what would have been obtained by interviewing all consumers who meet the qualification criteria in the markets surveyed.



Methodology

Omnibus Survey

In addition to the online survey, a telephone omnibus survey was conducted among 955 German adults aged 18+ across the nation to obtain incidence and profile data of the past and future pleasure trip travellers. This provided a base from which to weight the online survey as required.

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

Phase Five: Regional Products Innovation Online Forums

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

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

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

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

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



Results

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

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

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



Key Findings

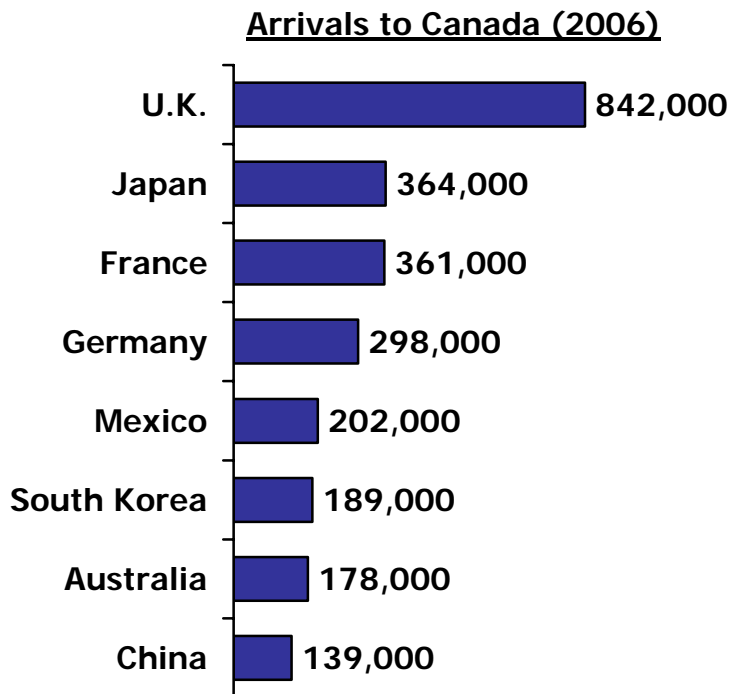


Key Findings

Germany a Key Market

- Germany is the fourth most important market for Canada, among the CTC's target countries in terms of trips arriving in Canada.

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



Source: Statistics Canada

- Furthermore, the total German long haul travel market has grown substantially since 2001—from 11.6 million prospective travellers to 26.2 million in 2007. In 1996, it had been at 18.1 million.
- This reflects an improved disposition toward overseas travel among Germans, undoubtedly driven to a great degree by the improved global political scene.
- The implication is that the travel market is stronger now than it likely has ever been, so the opportunity for growth to Canada is sizeable.

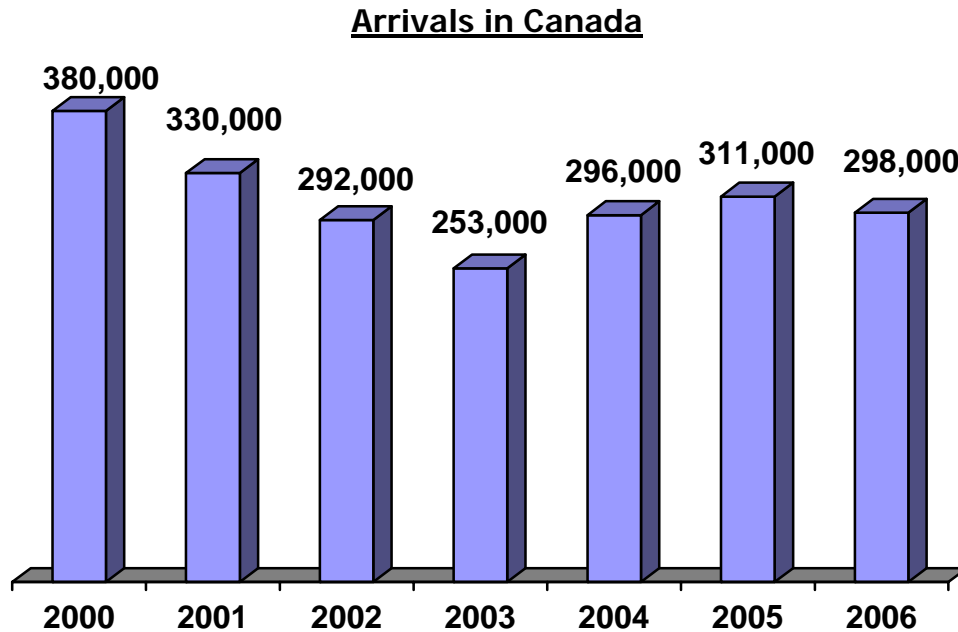


Key Findings

Trends to Canada

- In spite of the growth in the prospective travel market, German arrivals in Canada have remained relatively flat over the past 5 years.

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



Source: Statistics Canada



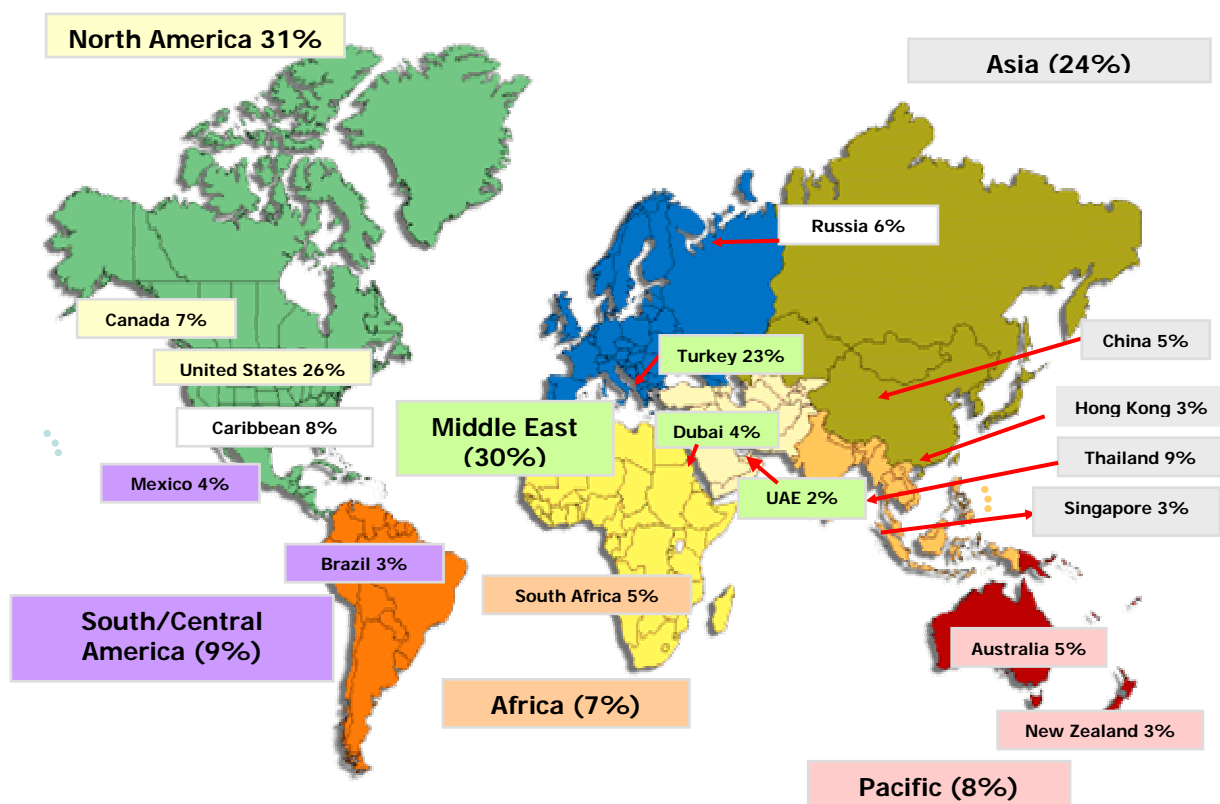
Key Findings

Canada in Perspective

- At the present time, the most popular destinations for Germans beyond the E.U. are the U.S. (26%), Asia (24%) and the Middle East (30% - especially Turkey at 23%).
- Canada attracts only 7% of long-haul trips (based on most recent trip data), a relatively minor destination. Australia is even less popular (5%).

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

Long-Haul Destination on Last Trip



Key Findings

The Desired Canadian Experience

- 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.



Key Findings

- Germans want to get in touch with an authentic way of life as well. It helps them switch off from their stressed life and get in touch with themselves.
- Smaller communities provide this opportunity and, as one receptive in Atlantic Canada noted:

“They are not so turned on by our cities as much as small villages. When they reach a place (in this case Atlantic Canada) with a population of 300 people, they get really excited. It’s just so real.”

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”

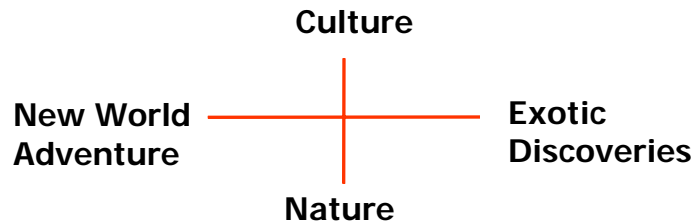
- However, while it is important to reassure travellers of good restaurants, accommodation and social interaction, they still need to know what is **unique** about Canada beyond spectacular nature. This can include aboriginal culture experiences, driving in a unique natural setting, polar bear viewing, dog sledding, etc.



Key Findings

Canada's Image vs. Competitors

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



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

Brand Positioning

Australia

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

U.S.A

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

S.E. Asia

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

Canada

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

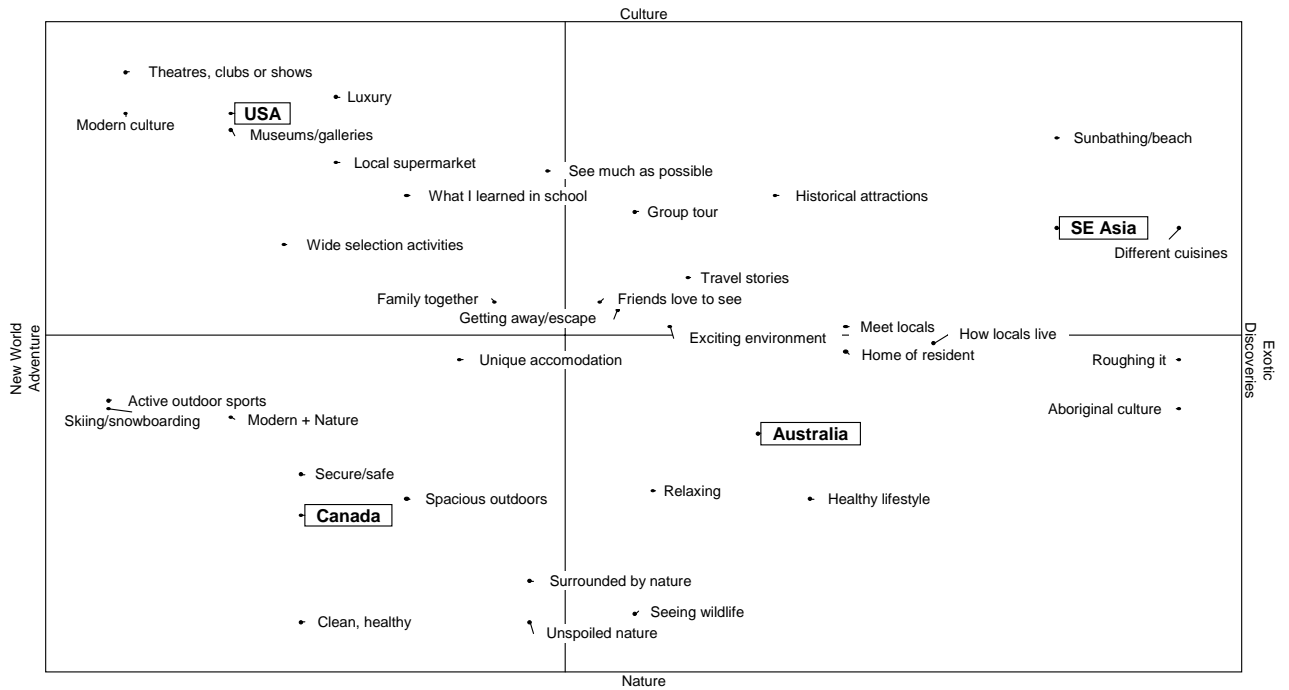
Canada is positioning well away from cultural activities and an exciting environment which reinforces the weaknesses of the country's image, discussed earlier. The strength of its outdoor focus is clearly positive, given its importance to German travellers, but the product concept is not appropriately balanced.



Key Findings

KEY FINDINGS EXHIBIT 4: BRAND ATTRIBUTE MAP

Perceptual Brand/Attribute Map



Key Findings

Canada's Strengths & Weaknesses

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

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

	Vs. U.S.	Vs. Australia	Vs. South East Asia
Canada's Strengths	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Experiencing unspoiled nature • Surrounded by beautiful, unspoiled nature • Seeing wildlife in nature • Outdoor activities • Whale watching, autumn leaves, glaciers 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Enjoying the convenience of the modern world while experiencing nature • Enjoying Alpine (downhill) skiing or snowboarding 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Surrounded by beautiful, unspoiled nature • Feeling secure and safe • Experiencing unspoiled nature • Experiencing a wide, spacious outdoor environment • Seeing wildlife in nature • Enjoying the convenience of the modern world while experiencing nature • Participating in active outdoor sports
Canada's Weaknesses	<ul style="list-style-type: none"> • Experiencing a modern culture • Attending theatre, clubs, shows • Staying at luxury surroundings • Visiting museums or art galleries • Historical, well known places • Low rates, good deals and discounts 	<ul style="list-style-type: none"> • Experiencing aboriginal culture • Sunbathing or other beach activities • Spending time in one area to experience how local people live 	<ul style="list-style-type: none"> • Opportunity to try different cuisines • Sunbathing or other beach activities • Old architecture, world heritage sites • Low rates, good deals and discounts
Summary	<ul style="list-style-type: none"> • Canada is way ahead in terms of a natural environment • But the U.S. provides more cultural amenities • This makes the US a key competitor to Canada 	<ul style="list-style-type: none"> • Australia has marketed its aboriginal tourism far better than Canada. 	<ul style="list-style-type: none"> • Canada is far ahead in experiencing a natural environment. • S.E. Asia offers sun and exotic cuisine.



Key Findings

The Buy Cycle Model

a) **How it Works**

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



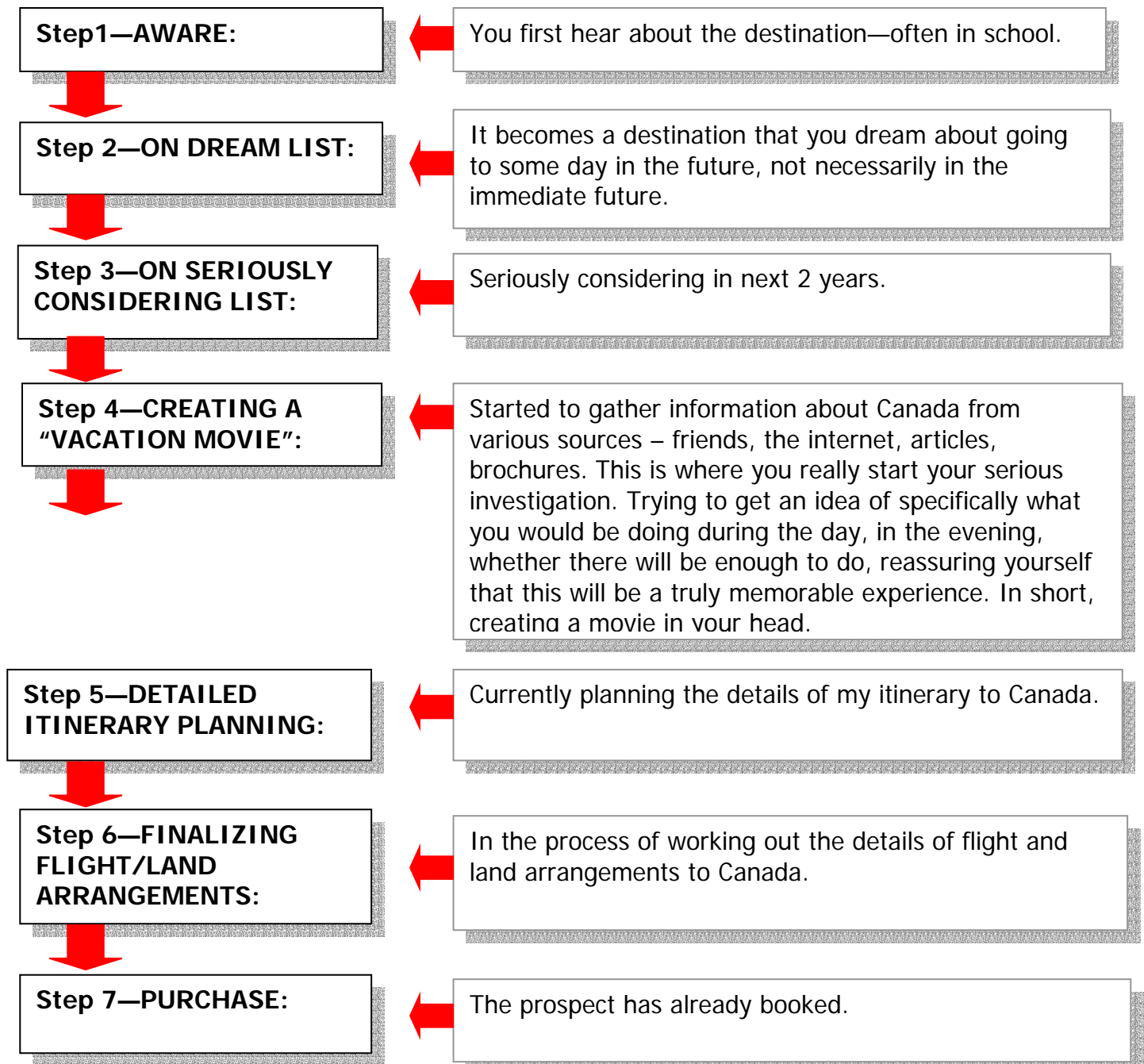
Key Findings

The Buy Cycle Model

a) How it Works

- The model is described below:

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



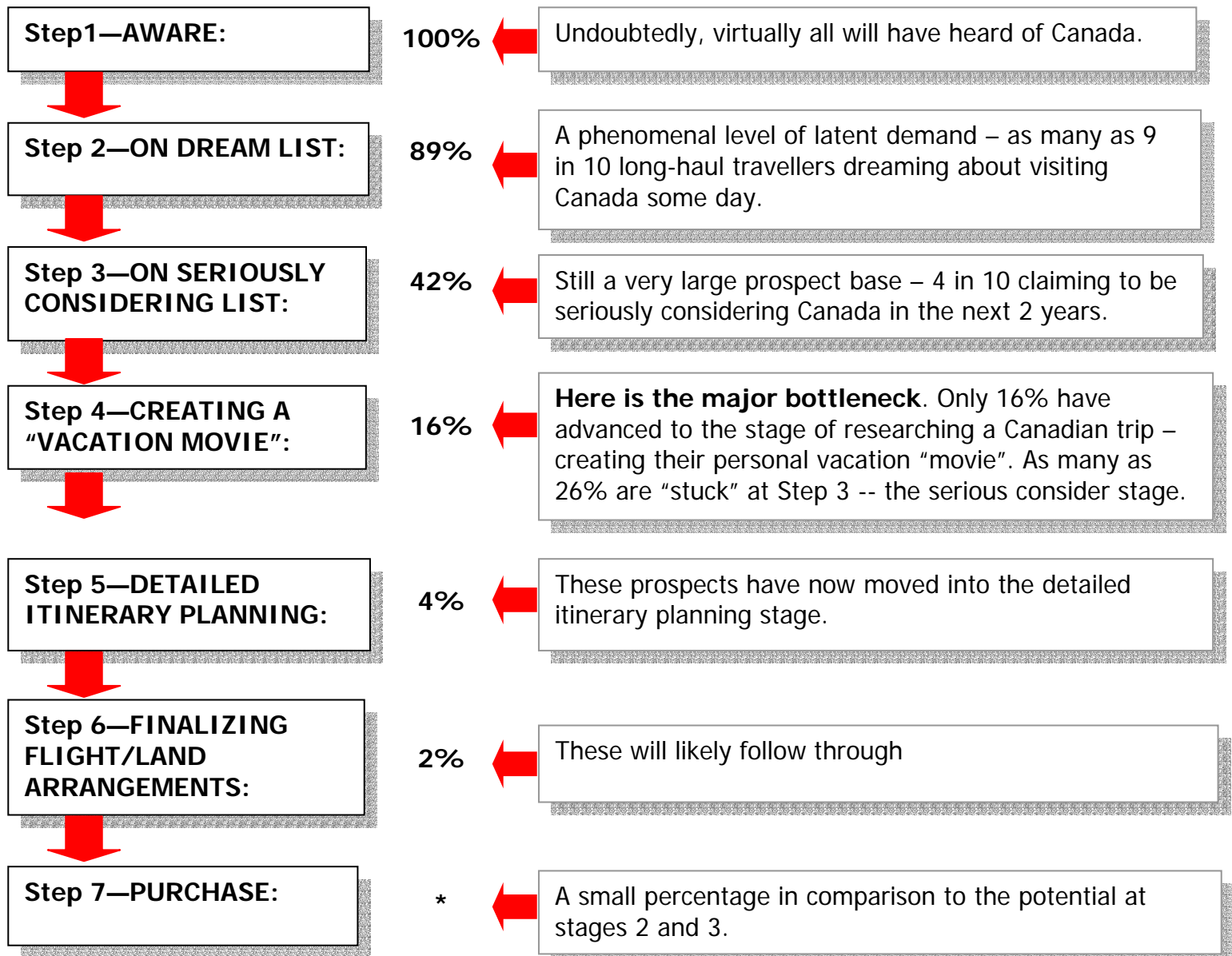
Key Findings

The Buy Cycle Model

b) Bottlenecks and Barriers – Canada

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

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



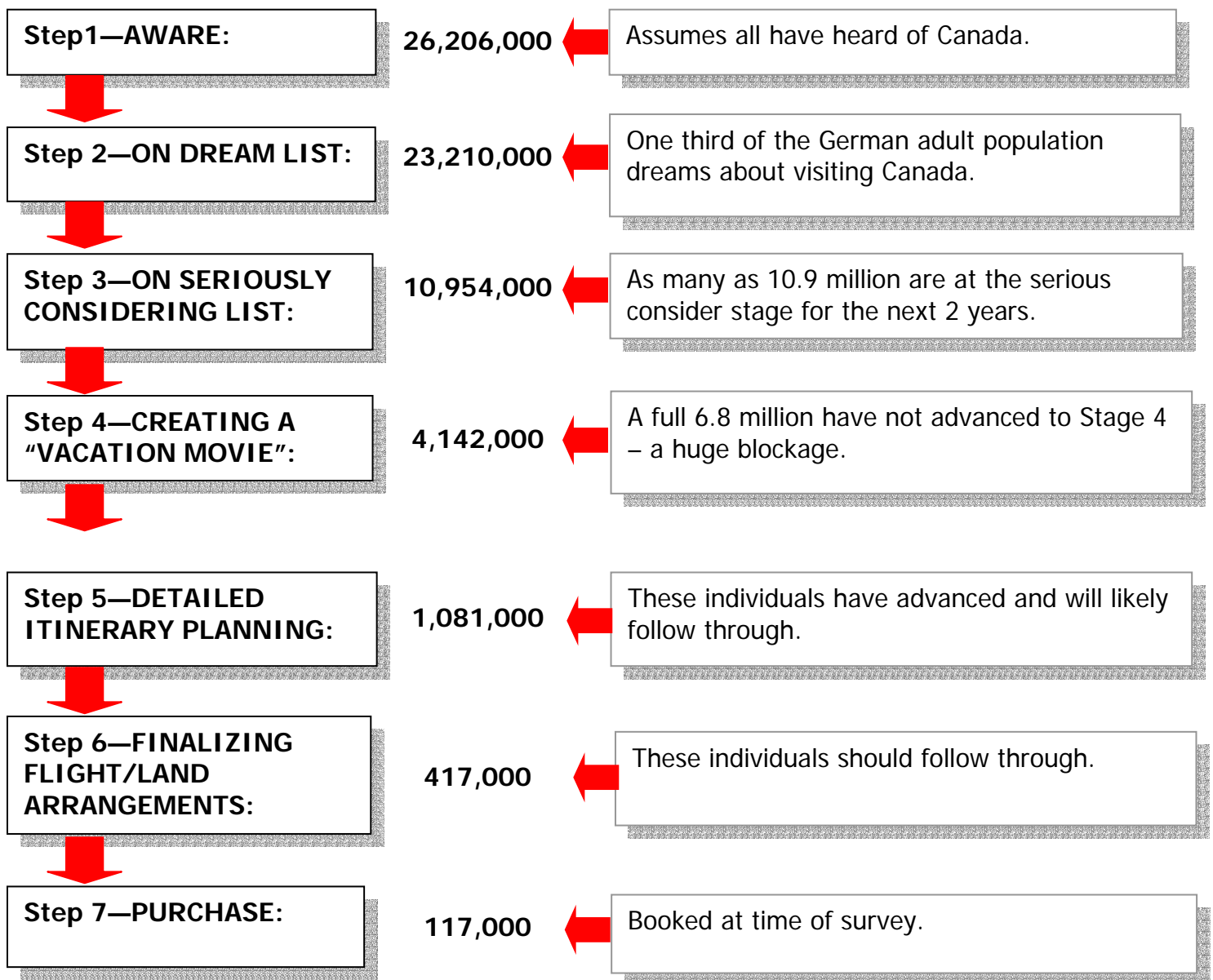
Key Findings

The Buy Cycle Model

c) Projected Market Size

- There are 26.2 million potential long-haul travellers in Germany out of a population of 67,892,000 aged 18 and over.

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



Key Findings

The Buy Cycle Model

Implications

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

Access to Detail

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

Viral Marketing

- Friends, especially previous visitors or residents are so highly influential that the CTC and its partners need to seriously explore viral marketing ideas.
- Ways must be developed to encourage friends or past visitors to “spread the word” about the virtues of a Canadian experience.

Itinerary Ideas

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



Key Findings

The Buy Cycle Model

Fighting Procrastination

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



Key Findings

Market Segmentation

The German long-haul market can be sub-divided into 5 benefit segments.

High Culture (27%)

This segment is attracted to city life and culture.

Local Culture (25%)

Meeting and interacting with local people and experiencing how they live at the grassroots level is the key focus of this group.

Resort Style (22%)

Relaxation, sun and luxury dominate here.

Nature Viewing (17%)

Being surrounded by beautiful nature and taking it all in sensually drives this segment.

Nature Participation (9%)

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

Canada's Prime Targets

- 1. Nature Viewing (17%)**
- 2. Nature Participation (9%)**

Canada's Secondary Market

- 1. Local Culture (25%)**



Key Findings

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

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

Ideal Canadian Vacation	Prime Target Segment	
	<u>Nature Viewing</u>	<u>Nature Participation</u>
Season of travel	<ul style="list-style-type: none"> July to September 	<ul style="list-style-type: none"> July to September
Multi-country visit	<ul style="list-style-type: none"> Half would include U.S. (53%) 	<ul style="list-style-type: none"> Over half would include U.S. (61%)
Duration in Canada	<ul style="list-style-type: none"> 2 1/2 weeks 	<ul style="list-style-type: none"> 2 weeks
Fully Independent Travel (FIT)	<ul style="list-style-type: none"> Majority 83% – package: 35%, non-package: 48% 	<ul style="list-style-type: none"> Majority 76% – package: 35%, non-package: 42%
Preferred regions	<ul style="list-style-type: none"> B.C., Ontario, Territories 	<ul style="list-style-type: none"> B.C. or Quebec
Preferred accommodation	<ul style="list-style-type: none"> Resort (mountain, seaside or lakeside) Motor home Authentic wilderness lodge 	<ul style="list-style-type: none"> Resort (ski, seaside or lakeside)
Preferred activities	<ul style="list-style-type: none"> Car rental Nature sightseeing See historical sites Getting to know local inhabitants Visiting smaller towns 	<ul style="list-style-type: none"> Soft adventure – particularly skiing/snowboarding, canoeing/kayaking, hiking/trekking, dog sledding, cycling Car rental Night life, wine tours, spas
<u>Segment Profile</u>		
<u>Gender</u>		
Male	55	61
Female	45	39
<u>Age</u>		
18 to 29	19	47
30 to 39	18	27
40 to 49	23	14
50+	40	13



Key Findings

Influential Media

Given the importance of Visiting Friends/Relatives (VFR) travel to Germans, it is not surprising that friends and relatives drive the destination decision for 41% of all long-haul trips to Canada.

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

- “Vox Tours” is the most influential television show, along with the documentary category generally.
- Word/phrase search engines are the main gateways to internet information (used by 78%).
- Resort websites (38%), general travel sites (35%), hotel websites (29%), tour operator sites (28%), and national tourist office sites (27%) follow.

Trip Planning

Germans plan their trip to Canada 9 months in advance and book 4 months in advance of travel. Consequently, product promotion must be timed well in advance of the travel season.

Over half book through travel agents or package providers (59%), but direct to airlines (32%) and hotels (15%) are also common.

The use of agents has change dramatically since 2001. In that year, as many as 89% of trips to Canada were booked through an agent, far higher than the 59% today.

Further, online bookings in that year represented only 5%. Today it has grown to 47%.

The Travel Trade

Virtually all travel agents surveyed said that travellers to Canada had all made up their mind to go to Canada prior to visiting the agent.

The agent today appears to have little influence on selling Canada to first time travellers. However, they can and do have significant influence on promoting and marketing specific side trips, activities and modular packages.



Key Findings

Also, they have significant influence with 2nd plus time travellers to Canada who have a huge appetite to see more. Repeat visitation to Canada was estimated by several members of the travel trade to be higher than 50%.

“When they come back from their first trip they come to me and say what can we do next in Canada?”

An underserved trend they identified is the consumers' interest in creating vacation modules which they could “plug” into as a mini trip or even an event. In other words, modular add-on vacation components need to be created and marketed.

The trade notes that German travellers often refer to Canada as their natural playground and the travel trade supports that perception.

They see real opportunities to generate repeat travel, especially given the amount of holiday time Germans typically have (5 to 6 weeks of vacation per year).

Further, they believe that Canada should be marketed as a series of regions, promoting the opportunities for Germans to immerse themselves in a particular area.

- Unlike many other foreign visitors (particularly those from Asia/Pacific countries), Germans do not feel a need to see all of Canada in one trip

Although Western Canada is a prime first time attraction, there is a particularly high interest in the North, including aboriginal experiences, wildlife viewing, etc.

- To facilitate repeat travel, they suggest reinforcing how close Canada is, how accessible it is.

“The east coast is only 6 hours away”

“Emphasize the ease of getting to Canada”

The Canadian specialist programme is viewed very favourably. Designated specialists appreciate the attentiveness they receive from the CTC.

However, on the other hand, the travel trade was somewhat critical of Canadian booths at the major shows. They do not appear to measure up to expectations and the level of quality that a Canadian exhibit should project. This includes shows in Stuttgart as well as Berlin.



Key Findings

Canada's Current Visitor

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

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

Multi-country visits	<ul style="list-style-type: none"> 69% Canada only. In combo with U.S. -- 31%
Trip Duration (average)	<ul style="list-style-type: none"> Average nights on trip:23, average in Canada:15
Season	<ul style="list-style-type: none"> May to September
Party Composition	<ul style="list-style-type: none"> With spouse (51%), alone (22%), with children (only 14%) Average party size: 3.4 persons
FIT	<ul style="list-style-type: none"> Mostly FIT (91%)
Top Five Activities in Canada	<ul style="list-style-type: none"> Taking city tours Taking nature tours Viewing rivers or waterfalls Visiting small towns Visiting places of historical interest
Purpose of Trip	<ul style="list-style-type: none"> Experiencing natural scenery first, enjoying local culture second.
Accommodation	<ul style="list-style-type: none"> Home of friend or relative (only 23% in spite of 36% having close contacts in Canada) City hotels (broad price range) Special interest in B&B's, authentic wilderness lodges and motor homes.
Expenditure (average)	<ul style="list-style-type: none"> 5,700 Euros per trip
Profile	<ul style="list-style-type: none"> Hamburg area, North Rhine key markets 54% under 40, only 24% 50+ 36% close friends/relatives in Canada



Key Findings

German Travel Market Trends to Canada 1996/2001 – 2007

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

1. Potential Long-haul Market Grows Substantially

- From 18.1 million potential long-haul travellers in 1996 to 26.2 million in 2007.

2. Ontario Has Become More Popular

- In 2001, Ontario attracted 42% of trips, now up to 58%. B.C. up more marginally from 45% to 53%, and Alberta following suit—30% to 38%.

3. German Travellers Are Younger

- In 2007, 77% of recent Canadian visitors are under 50 years of age, up from 63% in 2001 (1996 unavailable).

4. Travel Agents Losing Their Influence

- While still popular for booking travel, travel agents have declined from processing 89% of bookings to Canada in 2001 down to 59% in 2007.

5. Internet Bookings Climb Dramatically

- In 2001, only 5% of Canada bookings were on-line. Now, it has grown to 47%--26% direct to an airline.



SWOT Analysis



SWOT Analysis

Strengths

- The German economy is expected to remain healthy into the foreseeable future.
- The outbound travel market continues to be robust, although not expanding.
- Canadian arrivals, although fairly flat since 2004, are showing signs of recovering (+2% January to August, 2007).
- Spending on foreign travel by Germans is an annual 61.7 billion euros (2006), confirming the value placed on travel.
- Germans love the Canadian outdoors. The opportunity to connect with nature provides a sense of inner peace and freedom.
- The Canadian way of life (best exemplified by smaller towns) is highly appealing --considered "authentic", "real."
- The stressful German lifestyle and the lack of space (both emotional and physical) are big drivers for travel to Canada.
- Canada is considered welcoming and friendly to German travellers.
- In the same geographical area, being able to experience the conveniences of the modern world while experiencing nature.
- A clean, healthy environment.
- Unique, intriguing attractions such as the Territories, aboriginal tourism and superlative outdoor experiences.
- Canada has a plentiful supply of authentic wilderness lodges, B&B's and RV rental operations to appeal to the German's desire to get to the grassroots level.
- Past visitors note Canada's value for money favourably.
- Many Germans are prepared to treat Canada as their natural playground, driving repeat travel.
- Germans are entitled to 5 to 6 weeks of vacation per year.



SWOT Analysis

- Nine out of ten recent travellers to Canada would recommend it to others.
- German travellers show interest in most regions of Canada.
- Canada has an excellent environmentally responsible rating, although it is not a destination motivator.

Weaknesses

- Canada is too singularly nature focused.
- There is a lack of awareness that Canada can provide a highly interesting, rewarding and diverse vacation experience.
- Canada's aboriginal tourism is not as well promoted as in competitive destinations like Australia.
- Enormous latent demand (10.9 million Germans are seriously considering a Canadian trip in the next 2 years. Only 1.1 million have advanced to the itinerary planning stage). The CTC's current budget may be too low to effectively stimulate this demand.
- Canada is so vast it can intimidate those without a clear view of a future itinerary.
- Germans can be intimidated by images of Canada's true wilderness and wild animals (in particular bears).
- Canada is often positioned as too much of a hard adventure, according to the trade.
- Trade criticism of small, unimpressive CTC booths at the Stuttgart Fair and in Berlin.
- Canada is relatively expensive, according to the trade.

Opportunities

- Communicate that Canada can provide a balanced vacation experience – nature plus cultural activities, quality accommodations, cuisine and an opportunity to observe and experience the aspirational lifestyle of Canadians.
- Focus on the unique attractions – natural and cultural – including polar bear viewing, dog sledding, and aboriginal tourism.



SWOT Analysis

- Communicate to the youthful Nature Participation segment that Canada provides indulgence, pampering and fun (e.g. wine tours, spas and night life) in conjunction with excellent soft adventure.
- Assist the 10.9 million Germans seriously considering Canada in the next 2 years to create their own vacation “movie” and advance through the Buy Cycle.
- Improvements to the official websites to assist vacation planning.
- Ensure high placement of CTC/partner sites on the dominant word search engines.
- More itinerary ideas for the dominant FIT traveller.
- German prospective visitors typically want to focus on specific regions of Canada, so provide regional itineraries.
- Promotions should be sensitive to the German’s general fear of remote wilderness.
- Provide films for television travel shows, a highly influential medium.
- Providing more trip modules (i.e. add-ons to vacations) which are growing in popularity among FIT travellers.
- The friendly, welcoming nature of Canadians is an under-promoted asset.

Threats

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



The Way Forward: Considerations



The Way Forward: Considerations

There are 9 key areas that the CTC should focus on to accelerate market growth within Germany.

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



The Way Forward: Considerations

1. Reposition The Canadian Brand To Broaden Appeal

The Appeal of Canada

- ◆ 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.”*



The Way Forward: Considerations

- ◆ 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.

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.



The Way Forward: Considerations

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.”*



The Way Forward: Considerations

2. Positioning Pitfalls to Avoid

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

3. Break The Buy Cycle Barrier

a) The Buy Cycle model

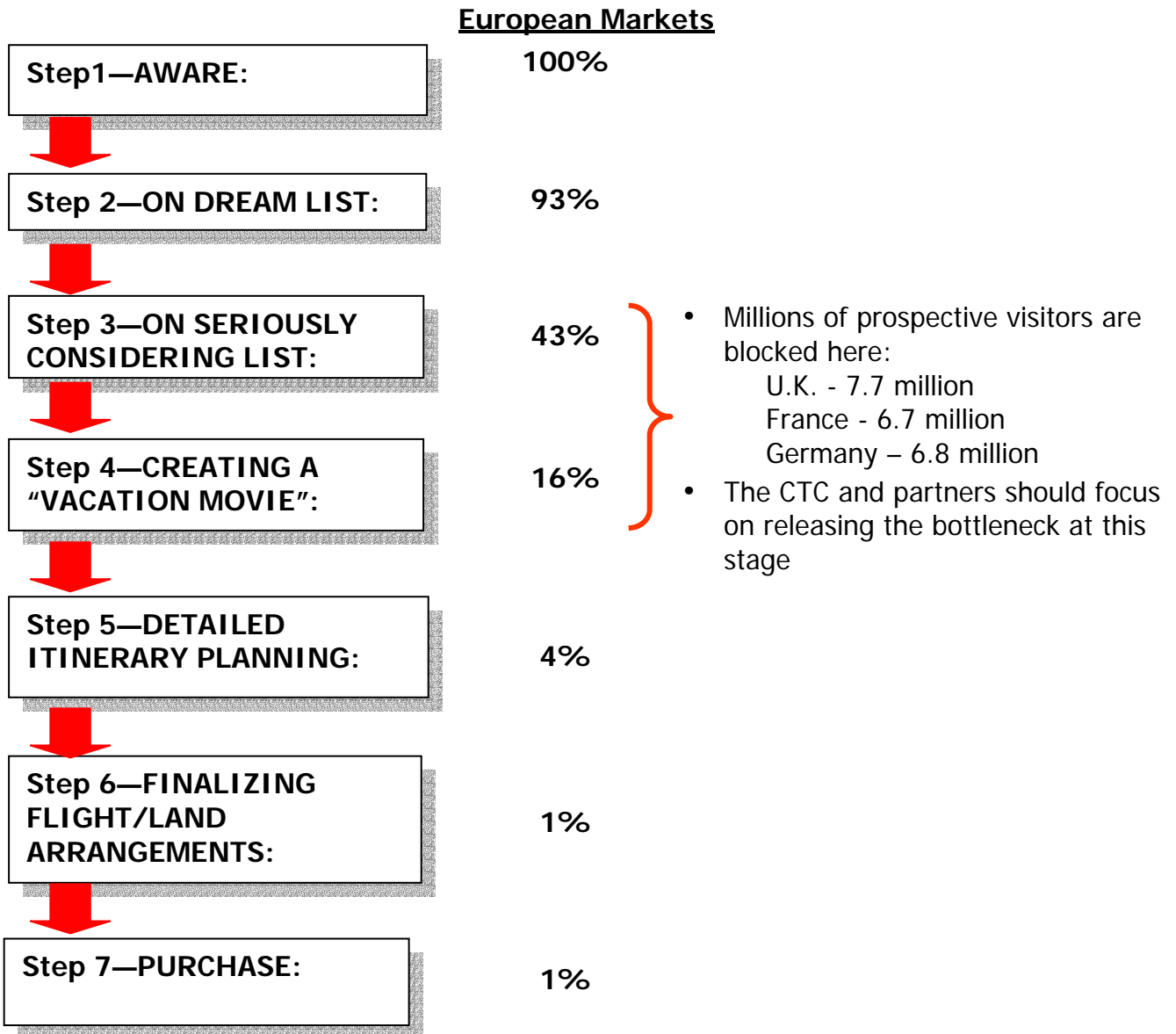
- ◆ Insignia's Buy Cycle Model has now been validated by Insignia in 6 countries:
 - ◆ China
 - ◆ South Korea
 - ◆ Taiwan
 - ◆ UK
 - ◆ France
 - ◆ Germany
- ◆ In all markets travellers can relate to the path to purchase process.
- ◆ Buy Cycle a 7-step model.



The Way Forward: Considerations

Buy Cycle Model

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



The Way Forward: Considerations

What Are The Components of The Ideal Movie?

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

Where Do Travellers Go To Build That Movie?

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



The Way Forward: Considerations

4. Enhance User Friendly Websites

CTC and Partners Should Enhance User Friendly Websites

Most official sites appear built for the North American market.

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

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

They need:

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

Website Report Card

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

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

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



The Way Forward: Considerations

5. Campaign Needed To Drive Prospects to the Websites

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

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

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

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

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

6. Influential Media

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

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

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

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



The Way Forward: Considerations

7. Trade Support

Fact

With internet booking soaring, agents see their future survival depending on three directions:

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

Implications

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

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

Fact

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

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

Implications

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

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



The Way Forward: Considerations

Fact

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

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

Implications

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

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

8. New Product Must Be Brought to Market

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

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

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

Although packages still constitute a significant share of trips (38% for the U.K., 36% for German and 49% for French trips to Canada), the market will continue to swing more toward non-packaged FIT and, consequently, by pass the operator.

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



The Way Forward: Considerations

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

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

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

Top Five Priorities

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



Findings in Detail



Travel Trends



Section 1: German Economic Outlook



1.1 Economic Overview

GDP:	2,322,200 million Euros (\$2.6 trillion PPP)
Inflation:	1.8%
Exchange:	1 Euro = 1.47 Canadian Dollars (avg. to Nov. '07)
Population:	82,376,451
Unemployment:	9.8%
Leave Entitlement:	5 to 6 weeks
2008 Issues:	Continuing difficulties with higher unemployment in the former Eastern Germany, as well as higher than expected inflation in the latest estimates, point towards a slow down in 2008 of the German economy. Consumer confidence may dip if the slow down is worse than predicted. Long term prospects are good, needed structural reforms are underway, and German manufactured goods remain popular on the global market.
Overall:	Strong and slowing down slightly

The German economy is one of the foundations for the European Economic Area. It is overall stable and has enjoyed good growth rates based on the international demand for goods manufactured in Germany.

However, citing global risks and instability, most forecasts for 2008 are conservative, with lower growth rates than previously seen as well as slightly higher inflation.

These are seen as short term problems given the overall health and sound structure of the German economy. There are long term issues lingering in the country, for instance the inequality of unemployment rates between West and East Germany. However, overall these problems are being addressed through reforms and most economists remain overall optimistic about Germany's economy in the mid and long term.



1.2 Population and Demographics

As is the case for most industrialized nations, Germany has an aging population. In addition to this, the birth rates have slipped relative to the death rates such that there has been a shrinking in the population since 2004.

The World Bank predicts that by 2015 the German population will be only 80.3 million people. Currently, the average of women having 1.4 children is expected to hold for the coming years. This will result in a sharp decrease in population that immigration will not overcome.

The issue of maintaining population and keeping the work force and social insurance beneficiaries balanced is a major concern in Germany, as with most Western nations. Regardless, the economic consequences of these trends have not yet been seen and are unlikely to come into play in the short to mid-term.

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

	2000	2001	2002	2003	2004	2005	2006
Under 5	3,945,739	3,918,414	3,848,753	3,764,421	3,690,321	3,612,590	3,536,502
5 to 9	4,162,474	4,045,252	4,011,500	3,995,013	3,979,585	3,971,753	3,934,678
10 to 14	4,728,915	4,734,378	4,656,960	4,529,412	4,373,479	4,201,922	4,073,439
15 to 19	4,622,769	4,626,530	4,657,032	4,707,821	4,765,035	4,811,827	4,799,077
20 to 24	4,585,325	4,699,187	4,797,570	4,860,247	4,884,844	4,872,012	4,851,039
25 to 29	5,076,408	4,840,453	4,713,526	4,691,671	4,724,593	4,798,663	4,885,603
30 to 34	6,823,750	6,561,489	6,247,553	5,864,384	5,472,813	5,146,001	4,896,881
35 to 39	7,183,404	7,241,945	7,248,219	7,179,404	7,030,542	6,814,397	6,544,281
40 to 44	6,306,442	6,496,132	6,685,035	6,876,960	7,046,957	7,152,500	7,200,925
45 to 49	5,682,551	5,748,750	5,841,512	5,951,201	6,090,029	6,258,247	6,440,506
50 to 54	4,796,696	5,109,639	5,326,238	5,465,996	5,549,446	5,598,906	5,660,402
55 to 59	5,150,374	4,686,005	4,467,742	4,428,231	4,457,783	4,675,944	4,980,453
60 to 64	5,624,031	5,761,886	5,734,587	5,570,011	5,337,115	4,933,900	4,486,985
65+	13,522,634	13,879,869	14,252,271	14,649,407	15,113,724	15,618,763	16,084,683
Total	82,211,508	82,349,925	82,488,495	82,534,176	82,516,260	82,469,422	82,376,451

Source: EuroStat



1.3 Exchange Rates

Germany uses the Euro, and thus its purchasing power abroad is tied to that of the whole of the Euro area.

Since 2000, the Euro has generally gained in strength against other currencies, allowing for greater international buying power. Gains have been particularly high against the US dollar (which has been slipping in value).

For the Canadian dollar, gains have been more modest. Still, the Euro trades favorably against the Canadian dollar, even with recent increases in strength. This is true in general of the Euro's value against foreign currencies used in popular German destinations: despite recent slips in value, the Euro has strong international buying power, facilitating German long-haul travel.

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

Currency	2000	2001	2002	2003	2004	2005	2006
US Dollar	.92	.90	.95	1.13	1.24	1.25	1.26
AUS Dollar	1.59	1.73	1.74	1.74	1.69	1.63	1.67
NZ Dollar	2.03	2.13	2.04	1.95	1.87	1.77	1.94
CAD Dollar	1.37	1.39	1.48	1.58	1.62	1.51	1.42
Thai Baht	37.09	39.91	40.72	47.05	50.12	50.14	47.68
HK Dollar	7.2	6.99	7.38	8.12	9.69	9.69	9.76

Source: FXHistory, from Interbank Rates



1.4 Economic Trends

While entering into a slight economic slowdown, the German economy will continue to expand and perform well overall.

Disposable income per inhabitant has risen consistently over the past 6 years, and is expected to continue to climb. The 2000 to 2006 change was 14.2%, and the estimated increase from 2006 to 2007 is 4.3%.

While inflation is increasing generally, it remains at an acceptable level and the various initial calculations for 2007 and forecasts for 2008 do not indicate overly high inflation. Likewise, unemployment is thought to have peaked and should continue to show a downward trend due to continued policies addressing issues in the labour market.

EXHIBIT SECTION 1-3: GERMAN ECONOMIC INDICATORS TRENDS

Indicator	2000	2001	2002	2003	2004	2005	2006	2007(p)
GDP Growth (% over previous year)	3.2	1.2	0	-.2	1.1	.8	2.9	2.5
Disposable Income (per inhabitant, converted to CAD\$)	36,235	36,971	37,413	37,855	39,328	39,917	41,390	43,305
Inflation	1.4	1.9	1.4	1.0	1.8	1.9	1.8	-
Unemployment	7.5	7.6	8.4	9.3	9.7	10.7	9.8	-

Source: EuroStat



Section 2: Outbound Travel Trends



2.1 Size of Potential Market

From a sharp drop in 2001, the German long-haul market has grown substantially – now numbering 26.2 million individuals, up from 11.6 in 2001.

Actual long-haul trips have not grown by the same magnitude. These figures simply reflect the enormous growth in latent demand as the political situation globally improved, as did the German economy.

<u>Germany Long-Haul Market Trends</u>			
	<u>1996</u>	<u>2001</u>	<u>2007</u>
Adult population	64,500,000	66,500,000	67,900,000
Incidence of long-haul travel*	27.6%	17.5%	38.6%
Projected market size	18,100,000	11,600,000	26,200,000

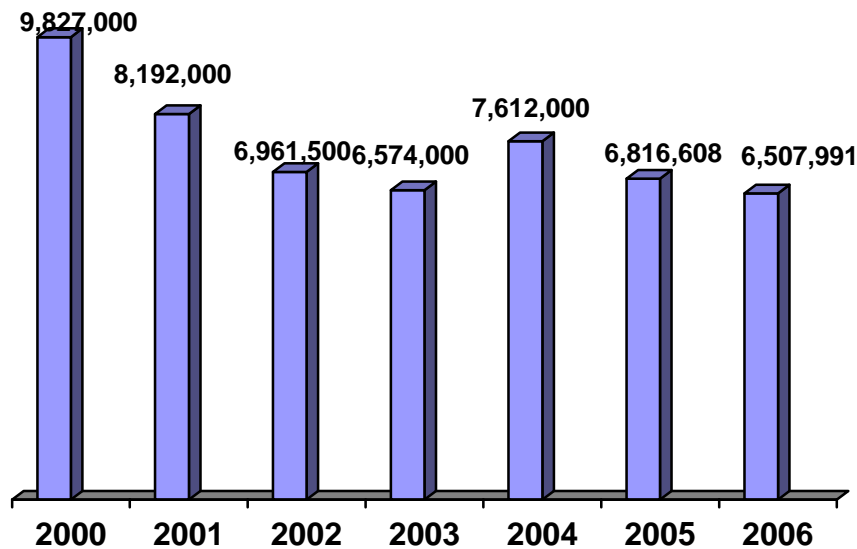
Source: CTC Surveys 1996, 2001¹

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



2.2 Long-Haul Market Size

EXHIBIT SECTION 2-1: GERMAN LONG-HAUL¹ TRIPS – 2000 TO 2006



Source: EuroStat

Despite a sharp reduction in market size from 2000 to 2002, the German market is quite healthy at 6.5 million outbound long haul trips in 2006. This is at the end of a relatively stable period from 2002 to 2006.

From 2000 to 2006 the market showed a decrease of 33.8%, but has not shown further signs of slipping below the 6.5 million mark.

¹ Definition used is the sum of outbound trips to the Americas, Asia, and Africa. Oceania data for this time period is not reliably available, but is projected to be below half a million.



2.3 Travel Trends

In terms of long-haul destination areas, all areas have experienced a decrease in outbound trips from Germany except for Asia. Even for Asia, the gains have been relatively small.

The biggest loser among the major outbound destination areas has been North America, with nearly 60% loss trips when comparing 2006 to 2000.

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

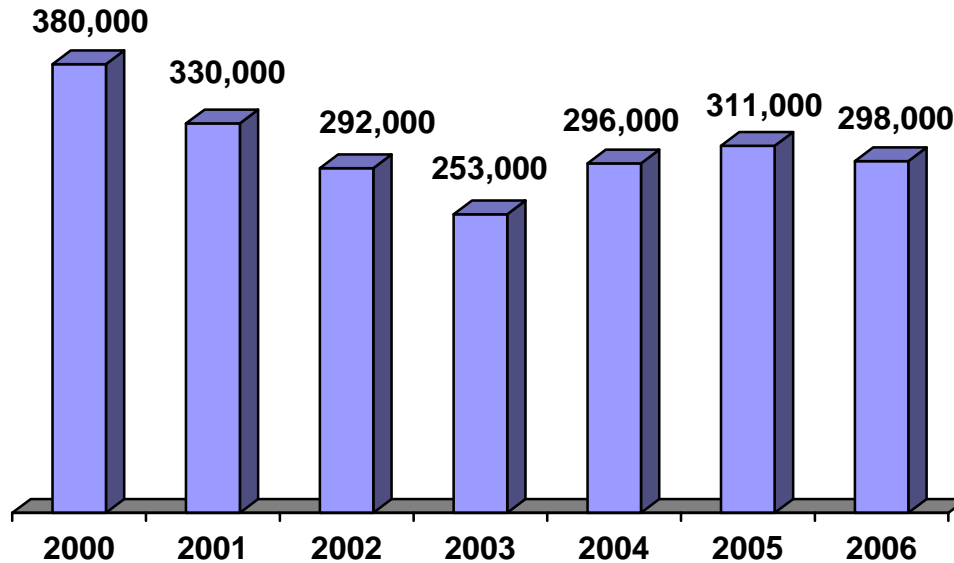
	2000	2006	% Change
North America	2,943,000	1,192,564	-59.5
Central and South America	1,503,000	971,088	-35.4
Africa	3,764,000	2,606,603	-30.7
Asia	1,617,000	1,737,736	+7.5

Source: EuroStat



2.4 Arrivals in Canada

EXHIBIT SECTION 2-3: GERMAN TRIPS ARRIVING IN CANADA 2000 TO 2006



German arrivals in Canada have shown a relatively flat pattern since 2003, a year with extremely low arrivals from Germany and elsewhere. This may be due to international events, including the initiation of the US's war in Iraq. The sharp declines leading into 2004 are not seen in the numbers after that point.

Comparing the change in arrivals from 2000 to 2006, there has been a change of -21.6%. This is less than the total loss of long-haul trips, indicating that Canada is not losing German travellers to the same degree as some competitive destinations.

Between 2000 and 2006 there was a 60% drop in Germans declaring Canada as their primary outbound destination for long-haul holiday trips. This is significantly more than the reduction in actual arrivals, indicating Canada becoming more of a secondary destination for German travellers.

Tourist arrival estimates from January to September in 2006 and 2007 show the German arrivals in Canada increasing by 2.4%, going from 256,698 to 262,764.



2.5 Expenditures

Between 2000 and 2006 the expenditures by Germans travelling out of Germany for 4+ days on holiday decreased, with a change of -19.2%. This overall trend, however, conceals the rise and fall of the general spending pattern. While overall the expenditures are resting at a lower point, they reached a peak of 85,519,000,000 Euros in 2003, followed by a sharp drop.

In general, this points to a trend for the big ticket trips to be taken en masse by the German people, with events arranging such that the market as a whole spends a great deal in a particular year.

Overall, German travellers spend a great deal and represent a large market in terms of tourism expenditures.

EXHIBIT SECTION 2-4: GERMAN TRAVEL EXPENDITURES 2000 TO 2006

2000	2001	2002	2003	2004	2005	2006
76,348,288	68,924,702	65,455,000	85,519,000	63,322,000	56,084,672	61,651,447

Source: EuroStat



Consumer Surveys – Qualitative and Quantitative Analyses



Section 3: Destination Motivators



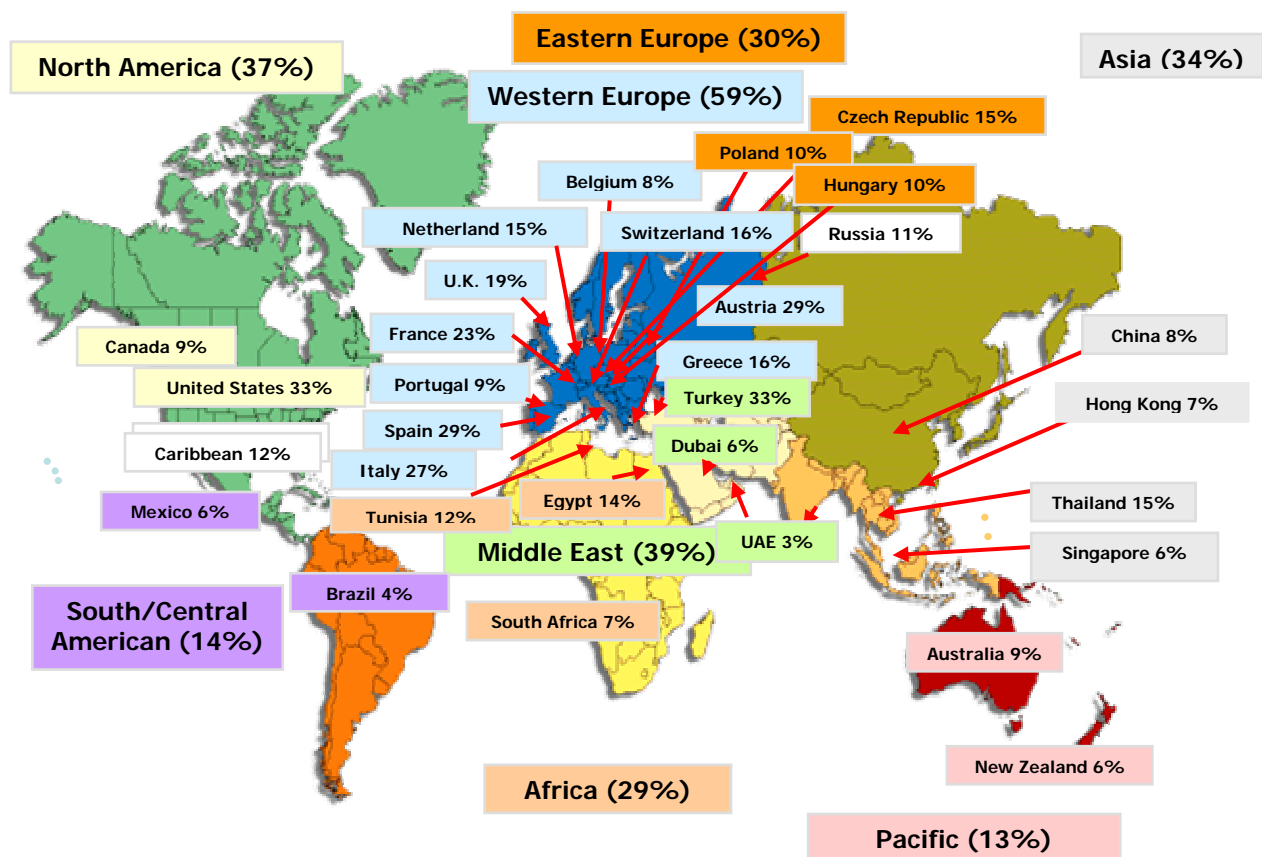
3.1 Current Destinations Outside Home Country (Past 3 Years)

Long-haul travellers take many trips within their own continent—in the past 3 years Western Europe (59%) and Eastern Europe (30%) being highly popular.

Among long-haul destinations, the Middle East (39%), Asia (34%) and the US (33%) dominate.

Canada attracted only 9% of long-haul German travellers over the past 3 years, a relatively minor destination.

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



Source: Quantitative Survey Q7¹

¹ Base=Past 3 year long-haul traveller (n=1,916)

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



3.2 Long-Haul Destination Market Share

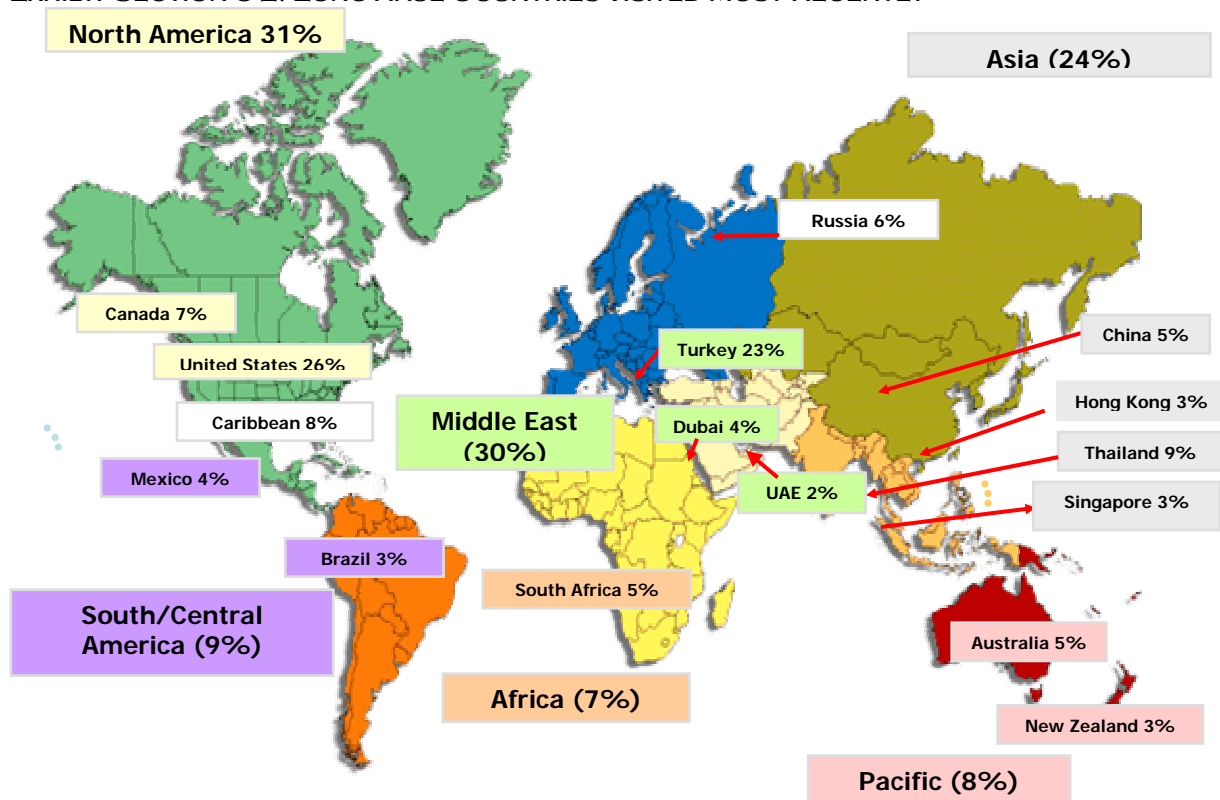
Among long-haul destinations, Canada captures 7% of long-haul trips (based on most recent trip data).

The prime destinations are the US (26%), Asia (24%), and the Middle East (30%)--especially Turkey (23%).

Other regions of the world--the Pacific (8%), Central/South America (9%), the Caribbean (8%), and Central/South Africa (7%) are all relatively minor destinations for German travellers.

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

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



Source: Quantitative Survey Q8¹

¹ Base= those who have taken a most recent trip (n=1,916)

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



3.3 Long-Haul Destination Trends

As with the UK, travel to Asia has clearly risen since the last decade.

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

	<u>1996</u>	<u>2001</u>	<u>2007</u>
	%	%	%
<u>Destination Most Recent Trip</u>			
U.S.	21	23	26
South East Asia/Far East	16	17	24
Caribbean	16	16	8
Other Africa	10	6	2
Central/South America	9	11	9
Australia	6	4	5
South Africa	6	7	5
Mexico	6	5	4
Canada	5	8	7
New Zealand	1	3	3

Source: CTC survey 1996, 2001



3.4 Destination Imagery-Focus Group Feedback

1. Canada's Image

a) Strengths

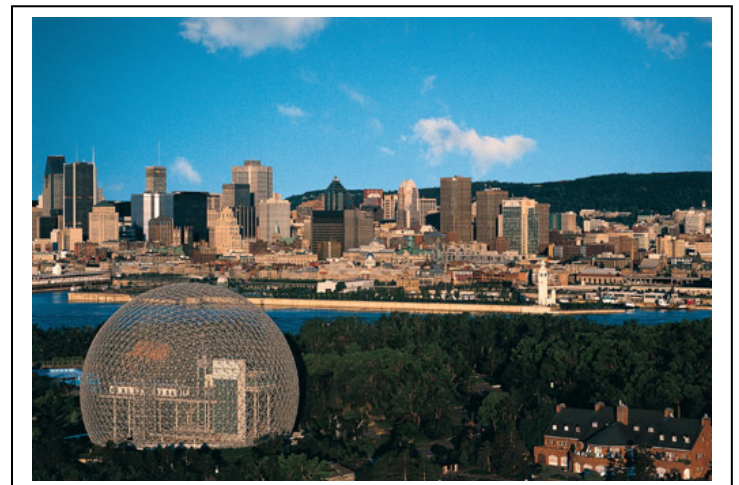
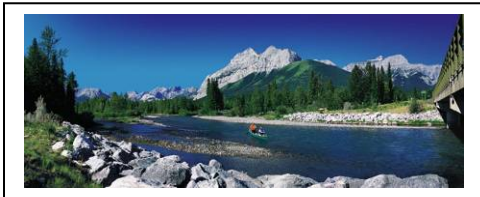
- ◆ The appeal of Canada is rooted in an idea of freedom and openness.
 - ◆ Vast prairies
 - ◆ Emptiness
 - ◆ Beautiful lakes
 - ◆ Wildlife
 - ◆ Tranquility
 - ◆ Purity
 - ◆ Friendly people with similar values
- ◆ The vastness is a double edged sword – on one hand very appealing to a geographically and physically “hemmed in” society. However, while the freedom to explore by caravan is attractive, there are worries that there will be a great deal of time spent going between interesting things, instead of encountering them throughout the trip.



3.4 Destination Imagery-Focus Group Feedback

b) Picture Sort

- ◆ The scenes that appeal most to German residents (among over 50 scenes shown) relate to the openness of Canada's nature, as well as the way in which the cities do not have a too harsh urban feel to them. Germans see the Canadian cities in these images as being open and clean.



3.4 Destination Imagery-Focus Group Feedback

c) Canada's Weaknesses

- ◆ Negative comments, particularly by those who have not been to Canada (yet have it on their dream list):
 - ◆ Cold, especially in winter
 - ◆ A cultural vacuum
 - ◆ Could be boring
 - ◆ Nature by itself doesn't cut it, it needs to focus on culture as well
 - ◆ Scale is so massive
 - ◆ Lack of culture/may have mostly US culture
 - ◆ Not enough information about history/culture/events
 - ◆ May be expensive

2. Barriers to Canada

- ◆ A number of international surveys place Canada very high on the "Dream List" – often first or second globally. This is the case in Germany, Canada has a magical draw which makes it a "must see" at some point in their lives, largely because of its openness and freedom. In Germany, the idea of wide open spaces and coasts are strong draws.
- ◆ However, the number of individuals who are in the process of planning a visit drops off extremely sharply. **Clearly, there are significant barriers that block the Canadian dream visit from becoming a reality.**
- ◆ This research has uncovered what the core issues are:
 - a. Without doubt, the number one reason for the dream not becoming a reality is that prospective travellers do not have a clear concept of a vacation in Canada.



3.4 Destination Imagery-Focus Group Feedback

- ◆ They know there is amazing nature beauty but “what else is there to do” – especially on the infrastructure and culture side. As they expressed:
 - ◆ *“I like nature, but I need something else.”*
 - ◆ *“It may be boring. I don’t know.”*
 - ◆ *“It seems more for older people, you can see things when you’re over 50.”*
 - ◆ *“I don’t know enough about it. There isn’t enough information available.”*
 - ◆ *“Many people think it is only a forest.”*
 - ◆ *“Will the French part have English speakers? How will that work?”*
- ◆ Due to the perception of it being nature dominated, Germans often worry about the safety of Canadian nature.
- ◆ There is not a sense of the prevalence of wild life or the actual interaction one has with them. They have no clear sense of how cities relate to the natural scenery.
 - ◆ Bears are very, very appealing. Most want to see them in nature, but are also very aware that there are dangers.
- ◆ While German travellers want to caravan and explore, they need to have a sense of the place in order to do this securely. They do not want to wander blindly through a strange country with just wilderness. In addition, they do want a “home base” abroad or a number of stops with city comforts.
- ◆ The current impression of many is that they are not certain of the availability of a **balanced** vacation.



3.4 Destination Imagery-Focus Group Feedback

- b. The country is so vast that many do not know where to start and, hence, simply defer the decision to go.

- ◆ The bottom line is that the decision to act on the “dream” of a Canadian vacation is easily deferred, as long as it is taken before *“I am too old and my health won’t permit it”*.

- ◆ The key barrier is a lack of awareness that Canada can be a highly interesting, rewarding and diverse vacation experience, rooted in nature, but balanced by urban activities and culture. And, reassurance that the Canadian “wilderness” can be experienced safely and easily.

- ◆ It is this idea that keeps the second time plus traveller to Canada coming back.
 - ◆ *“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 sociability, they still need to know what is **unique** about Canada beyond spectacular nature. As discussed later, this can include aboriginal culture experiences, driving in a unique natural setting, polar bear viewing, dog sledding, etc.



3.4 Destination Imagery-Focus Group Feedback

3. Building Better Product

a) The Ideal Trip

- ◆ When group participants described their ideal trip, there is a focus on a good hotel for a home base for whatever the rest of the trip includes. From there, elements of exploring the whole country (not just nature) are mentioned. The cleanliness, purity, and openness of the country come through in many of the descriptions and activities.
 - ◆ *“I want to experience the vastness of the country and the good air”*
 - ◆ *“Mixture of the free and unpopulated land and the large cities that have their own attraction”*
 - ◆ *“See lakes and experience how people live in the more populated areas.”*
 - ◆ *“With my kids, we’d arrive and spend two days in hotel in Halifax. Pick up the caravan. Pick a route. 6-7 days go to a larger city, go to national parks, go to a motel in the city. And see the destination to fly back from”*
 - ◆ *“Cities and rocky mountains, a good mix of nature and cities.”*

b) The Perfect Day

- ◆ These experiences represent elements of a trip that would be highly appealing.
 - ◆ *“Niagara Falls, eat well, and return to our nice accommodations”*
 - ◆ *“We want to see the ice and the bears”*
 - ◆ *“Looking at architecture that doesn’t conflict with nature”*
 - ◆ *“Would like to see Montreal, for a city trip.”*
 - ◆ *“Explore Toronto.”*
 - ◆ *“Enjoy the open space by myself.”*



3.4 Destination Imagery-Focus Group Feedback

- ♦ *“See beaches and lakes”*
- ♦ *“Camp with just my family.”*
- ♦ This market wants to experience the open vistas of Canada, as well as the way in which the city and wilderness mesh together in a way that appears seamless to Germans.

c) Existing Brochures

- ♦ Group participants were given for review a range of German market package brochures featuring Canada.
- ♦ They first used them to help create their ideal trip (discussed earlier) and then were asked to what degree this existing “product” reflected their needs.
- ♦ Many of the comments about the brochure package presentations reflect prospective traveller perceptions that Canada may **only** be about nature, without a balance of infrastructure activities.
 - ♦ *“Not enough people”*
 - ♦ *“It could be any country, any open country.”*
 - ♦ *“I want more on accommodations.”*
 - ♦ *“There is no life in the brochure.”*
- ♦ Overall, these comments show that the brochures do not show the advantages to Canada that Germans are looking for. They do not focus on the freedom and vast space while providing ideas of what to do. In addition, they also fail to show the unique quality of Canadian cities in how they relate to the wilderness.
- ♦ The urban and wilderness pictures must show the unique appeals of Canada to Germany, as well as the contrasts with Germany.
- ♦ Finally brochures and promotional material must show how Germans can live the Canadian lifestyle while traveling, not just observe it.



3.4 Destination Imagery-Focus Group Feedback

4. The Olympics 2010

- ◆ While the respondents indicated interest in the games, many said they watch them on TV and don't consider visiting them in person. The primary reason for avoiding the games in person is:
 - ◆ The hosting region and Olympic site is overrun with people viewing the games

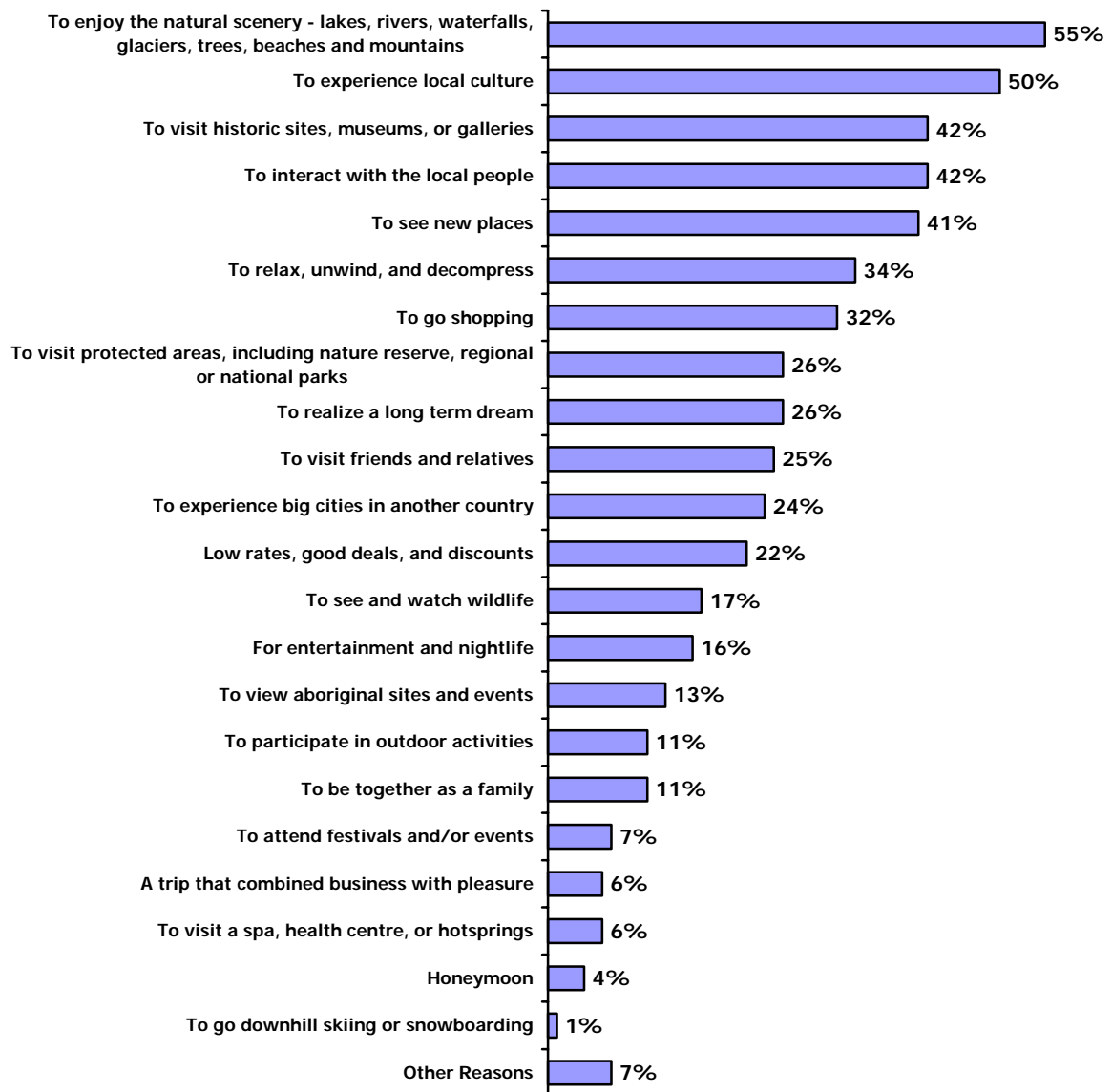


3.5 Purpose of Trip - All

The destination drivers for Germans are led by natural attractions, but right on their heels are experiencing local culture and interacting with people.

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

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.9a¹

¹ Base=n=1,916

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



3.6 Purpose of Trip – All – By Destination

The appeal of Canada is clearly nature dominated. Where it is particularly weak relative to other countries is in three areas—historic attractions, shopping and low rates/ good deals. Again it is clear that the Canadian experience needs to be broadened.

The appeal of Turkey is obvious here—good deals, shopping, a place to unwind that is not too far away.

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

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
All Reasons for Taking Trip				
To enjoy the natural scenery – lake, rivers, waterfalls, glaciers, trees, beaches and mountains	56	54	55	75
To experience local culture	61	50	43	44
To visit historic sites, museums, or galleries	50	50	41	36
To interact with the local people	48	33	41	41
To see new places	38	41	46	42
To relax, unwind, and decompress	32	50	24	24
To go shopping	34	41	46	26
To visit protected areas, including nature reserve, regional or national parks	27	10	33	46
To realize a long term dream	29	14	32	29
To visit friends and relatives	23	14	40	32
To experience big cities in another country	27	14	38	30
Low rates, good deals, and discounts	20	50	15	8
To see and watch wildlife	19	6	17	35
For entertainment and nightlife	16	16	23	13
To view aboriginal sites and events	18	9	13	13
To participate in outdoor activities	13	7	11	19
To be together as a family	9	18	11	12
To attend festivals and/or events	10	3	10	10
A trip that combined business with pleasure	10	3	9	12
To visit a spa, health centre, or hot springs	7	9	5	5
Honeymoon	9	5	4	5
To go downhill skiing or snowboarding	2	1	2	3
Other reasons	5	7	8	5

Source: Quantitative Survey Q.9a

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

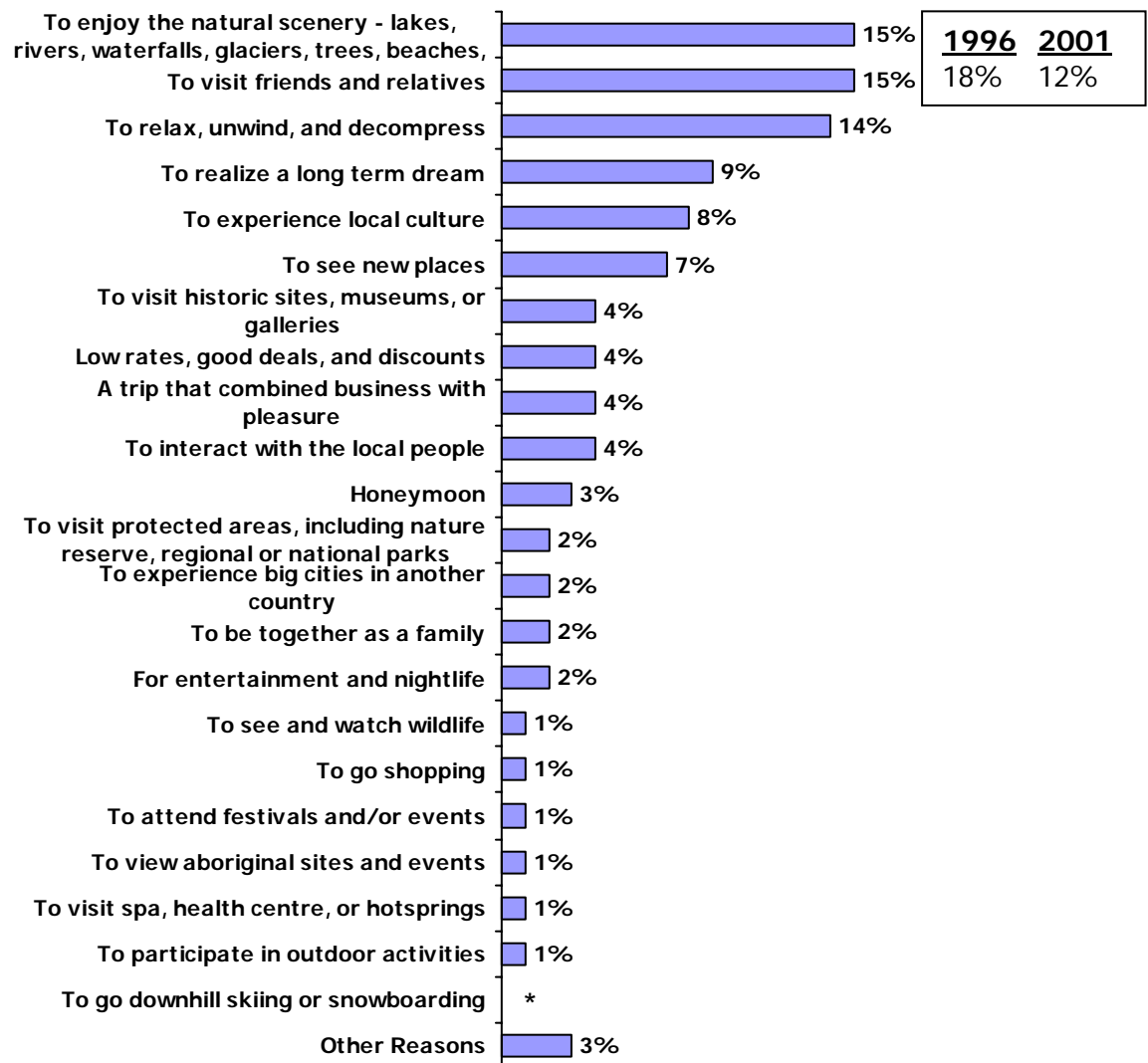


3.7 Purpose of Trip – Main

Nature experiences are the single most important reason for Germans to travel long-haul which definitely works in Canada’s favour. However, relaxation and unwinding is almost as important which talks to the importance of Canada building in that element to its positioning story. VFR travel also ranks in the top three for long-haul destinations.

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

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.9b¹

¹Base n=1,916

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

*Less than 0.5%



3.8 Purpose of Trip – Main – By Destination

Asia and Turkey dominate as places to unwind and decompress. This is not a key reason to travel to Canada. However, as noted in the previous section, Canada can provide those benefits via its nature. The focus groups reinforced this.

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

	Percent Among Travellers Visiting Each			
	Asia	Turkey	U.S.	Canada
	(412)	(354)	(567)	(692)
	%	%	%	%
<u>Main Reason for Taking Trip</u>				
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	15	14	11	34
To visit friends and relatives	11	5	23	19
To relax, unwind, and decompress	10	27	6	3
To realize a long term dream	6	3	12	7
To experience local culture	18	7	6	6
To see new places	7	8	9	5
To visit historic sites, museums, or galleries	5	8	3	1
Low rates, good deals, and discounts	1	13	1	*
A trip that combined business with pleasure	5	1	5	5
To interact with the local people	5	2	2	3
Honeymoon	4	2	2	2
To visit protected areas, including nature reserve, regional or national parks	1	*	4	2
To experience big cities in another country	3	1	4	2
To be together as a family	1	5	1	1
For entertainment and nightlife	2	1	2	1
To see and watch wildlife	1	--	*	1
To go shopping	1	1	1	1
To attend festivals and/or events	1	*	2	1
To view aboriginal sites and events	1	1	1	1
To visit a spa, health centre, or hot springs	*	1	--	*
To participate in outdoor activities	1	1	1	*
To go downhill skiing or snowboarding	--	--	*	1
Other reasons	2	1	3	2

**Canada
2001
22%**

Source: Quantitative survey Q.9b

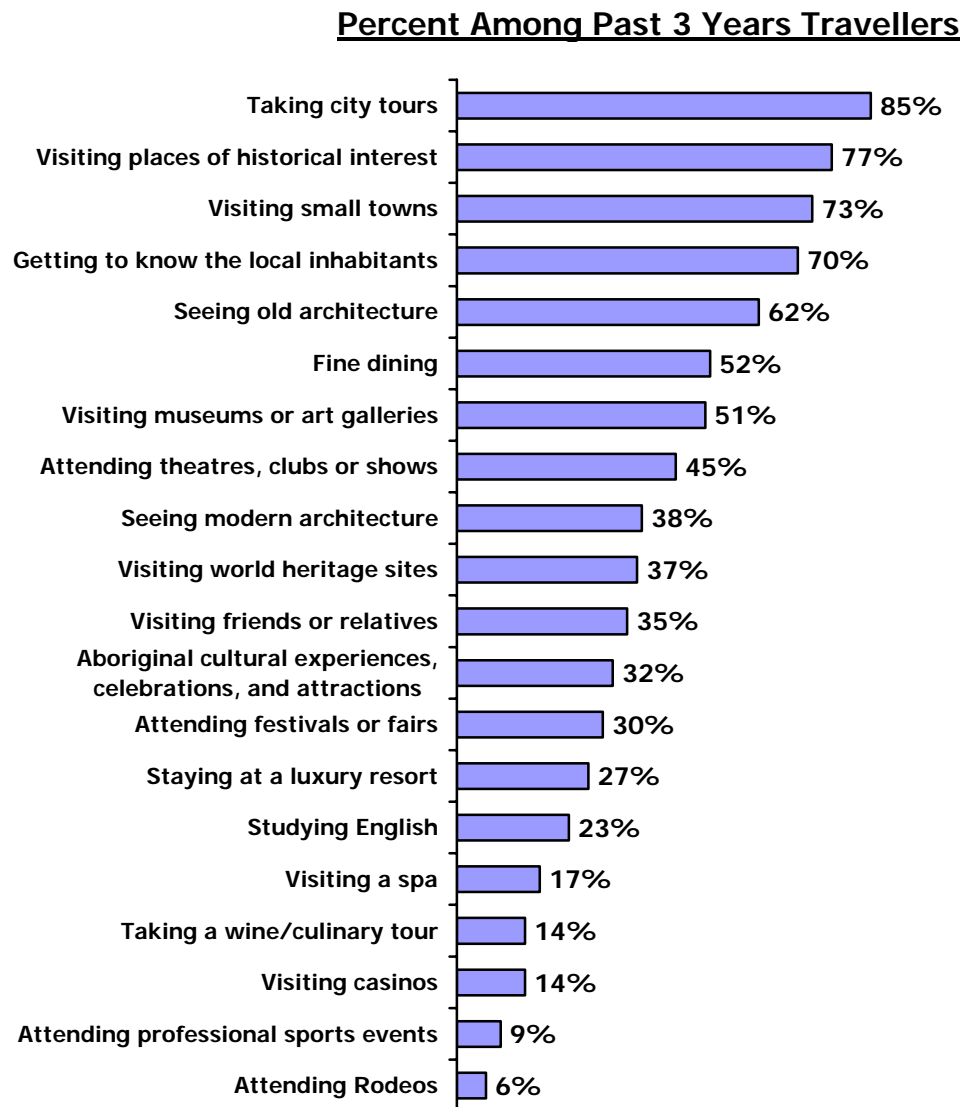
*Less than 0.5% Q. 9b Which of those was your **main reason** for travel?



3.9 Destination Activities – Culturally Oriented

Culturally dominated activities for German travellers include visiting small towns, getting to know the local inhabitants and seeing old architecture. The focus groups and trade interviews reinforced the importance of getting away from urban structure and feeling the authenticity of smaller villages and the local people. This is a product that Canada can provide.

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



Source: Quantitative Survey Q.19a¹

¹ Base: n=1,916

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

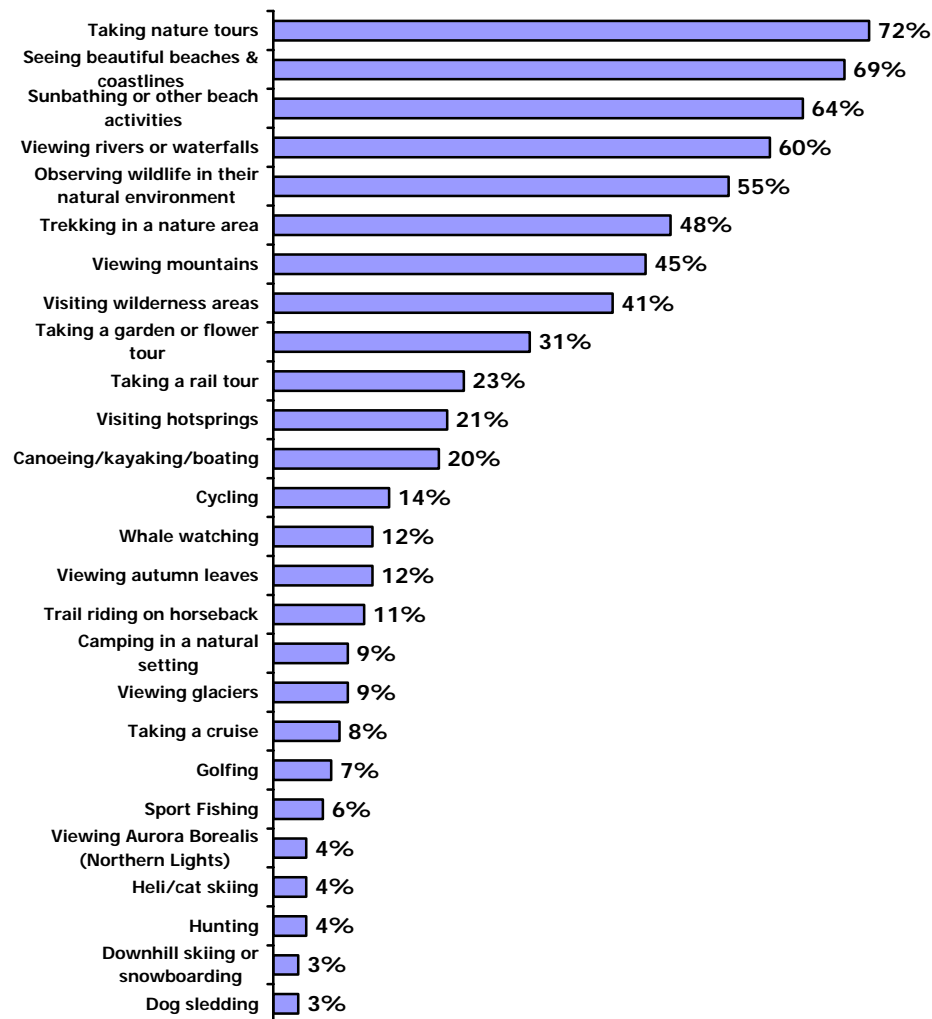


3.10 Destination Activities – Nature Oriented

On the nature side, viewing and observing out weigh actual soft adventure. This is a good reminder that, in spite of their enthusiasm for outdoor activity which German travellers are known for, not all are prepared to or interested in strenuous activity.

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

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19a¹

¹Base: n=1,916

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



3.11 Destination Activities – Culturally Oriented – by Destination

With culturally oriented activities, travellers to Canada are far less involved with seeing old architecture or visiting world heritage sites as in other countries. These are benefits that this country has and can be featured in an effort to round out the vacation concept.

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

	Percent Among Travellers Visiting Each			
	Asia	Turkey	U.S.	Canada
	(412)	(354)	(567)	(692)
	%	%	%	%
<u>Culturally Oriented Activities Participated In</u>				
Taking city tours	80	85	92	81
Visiting places of historical interest	79	80	74	67
Visiting small towns	69	74	71	71
Getting to know the local inhabitants	73	67	68	65
Seeing old architecture	72	68	57	47
Fine dining	62	45	57	46
Visiting museums or art galleries	55	41	60	47
Attending theatres, clubs or shows	48	39	57	41
Seeing modern architecture	40	23	55	42
Visiting world heritage sites	47	46	26	27
Visiting friends or relatives	34	20	51	44
Aboriginal cultural experiences, celebrations, and attractions	43	31	23	26
Attending festivals or fairs	37	21	32	32
Staying at a luxury resort	36	33	24	19
Studying English	23	9	45	37
Visiting a spa	25	21	17	15
Taking a wine/cultural tour	22	11	11	14
Visiting casinos	17	5	33	16
Attending professional sports events	11	3	14	13
Attending rodeos	8	2	11	14

Source: Quantitative Survey Q.19a



3.12 Destination Activities – Nature Oriented – By Destination

Observing nature is unquestionably where Canada excels vis-à-vis other destinations. Soft adventure activities are also considerably more common than elsewhere.

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

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
<u>Nature Oriented Activities Participated In</u>				
Taking nature tours	70	65	72	80
Seeing beautiful beaches and coastlines	66	78	64	50
Sunbathing or other beach activities	64	80	54	27
Viewing rivers or waterfalls	62	65	61	77
Observing wildlife in their natural environment	59	38	51	64
Trekking in a nature area	50	40	46	65
Viewing mountains	45	47	44	63
Visiting wilderness areas	42	18	46	61
Taking a garden or flower tour	33	24	30	47
Taking a rail tour	36	14	25	26
Visiting hot springs	21	35	15	26
Canoeing/kayaking/boating	25	17	16	31
Cycling	22	10	14	18
Whale watching	13	3	15	29
Viewing autumn leaves	12	10	19	31
Trail riding on horseback	16	7	12	21
Camping in a natural setting	11	5	9	19
Viewing glaciers	11	4	7	35
Taking a cruise	14	8	8	7
Golfing	10	4	8	11
Sport fishing	11	4	7	12
Viewing Aurora Borealis (Northern Lights)	8	2	4	13
Heli/cat skiing	8	2	4	9
Hunting	7	2	4	7
Downhill skiing or snowboarding	6	1	4	9
Dog sledding	7	2	3	11

Source: Quantitative Survey Q.19a

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

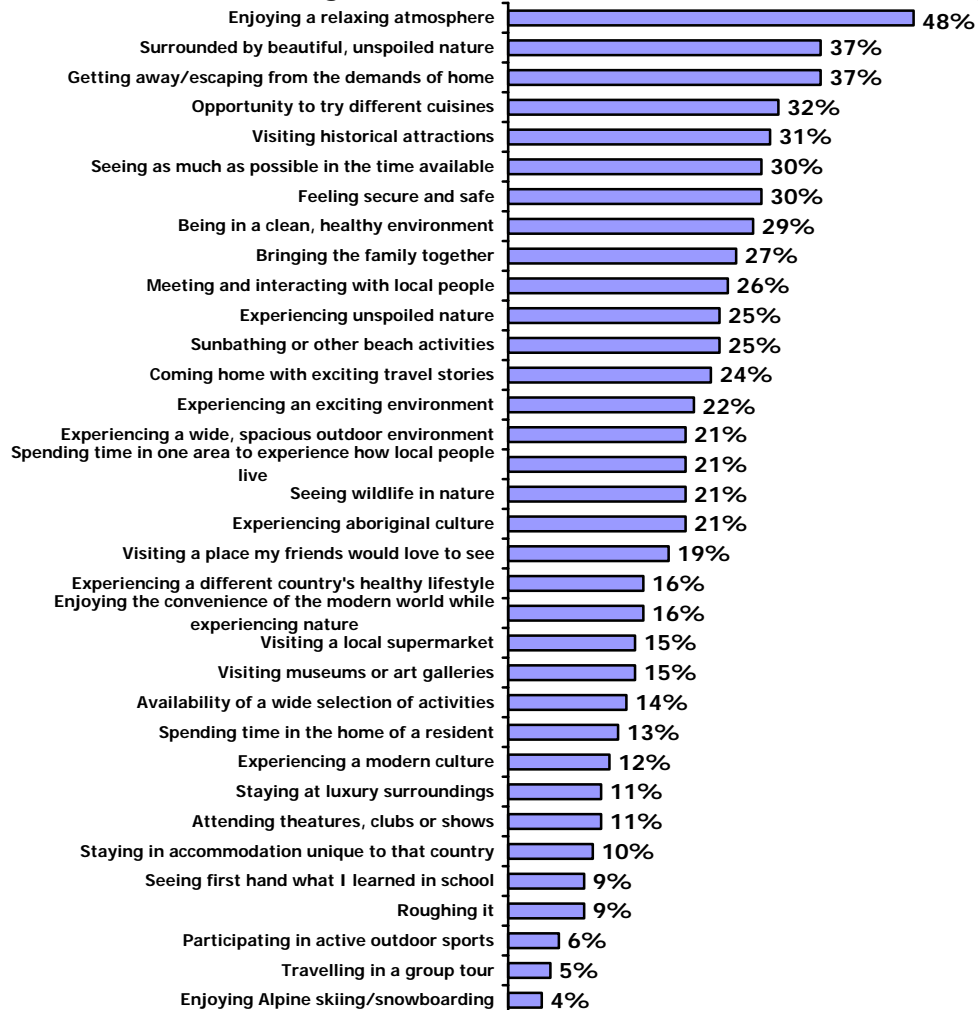


3.13 Importance of Attributes in Destination Selection

This chart ranks 34 destination selection attributes on importance.

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

Percent Among Past/Future Travellers Rated Attribute Very Important



Source: Quantitative Survey Q.20-¹

¹ Base=n=2,548

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



3.14 Destination Rating

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

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

	Vs. U.S.	Vs. Australia	Vs. South East Asia
Canada's Strengths	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Experiencing unspoiled nature • Surrounded by beautiful, unspoiled nature • Seeing wildlife in nature • Outdoor activities • Whale watching, autumn leaves, glaciers 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Enjoying the convenience of the modern world while experiencing nature • Enjoying Alpine (downhill) skiing or snowboarding 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Surrounded by beautiful, unspoiled nature • Feeling secure and safe • Experiencing unspoiled nature • Experiencing a wide, spacious outdoor environment • Seeing wildlife in nature • Enjoying the convenience of the modern world while experiencing nature • Participating in active outdoor sports
Canada's Weaknesses	<ul style="list-style-type: none"> • Experiencing a modern culture • Attending theatre, clubs, shows • Staying at luxury surroundings • Visiting museums or art galleries • Historical, well known places • Low rates, good deals and discounts 	<ul style="list-style-type: none"> • Experiencing aboriginal culture • Sunbathing or other beach activities • Spending time in one area to experience how local people live 	<ul style="list-style-type: none"> • Opportunity to try different cuisines • Sunbathing or other beach activities • Old architecture, world heritage sites • Low rates, good deals and discounts
Summary	<ul style="list-style-type: none"> • Canada is way ahead in terms of a natural environment • But the U.S. provides more cultural amenities 	<ul style="list-style-type: none"> • Australia has marketed its aboriginal tourism far better than Canada. 	<ul style="list-style-type: none"> • Canada is far ahead in experiencing a natural environment. • S.E. Asia offers sun and exotic cuisine.



3.14 Destination Rating

EXHIBIT SECTION 3-14: DESTINATION RATING

	Among Those Who Claimed Each Attribute Very/Somewhat Important When Considering a Trip			
	S.E. Asia	Australia	U.S.	Canada
	%	%	%	%
<u>Attribute Applies Extremely Well to Each Destination*</u>				
Enjoying a relaxing atmosphere	31	50	27	49
Surrounded by beautiful, unspoiled nature	30	58	28	64
Getting away/escaping from the demands of home	42	54	46	47
Opportunity to try different cuisines	69	48	35	38
Visiting historical attractions	57	46	50	42
Seeing as much as possible in the time available	45	47	58	43
Feeling secure and safe	21	46	34	53
Being in a clean, healthy environment	13	46	16	60
Bringing the family together	38	47	47	49
Meeting and interacting with local people	52	58	41	47
Experiencing unspoiled nature	28	60	25	65
Sunbathing or other beach activities	44	54	43	15
Coming home with exciting travel stories	52	61	54	52
Experiencing an exciting environment	49	59	48	52
Experiencing a wide, spacious outdoor environment	26	65	41	64
Spending time in one area to experience how local people live	52	56	35	44
Seeing wildlife in nature	28	61	24	55
Experiencing aboriginal culture	40	66	22	26
Visiting a place my friends would love to see	40	52	49	47
Experiencing a different country's healthy lifestyle	31	36	18	42
Enjoying the convenience of the modern world while experiencing nature	23	49	46	57
Visiting a local supermarket	41	48	64	47
Visiting museums or art galleries	33	40	63	42
Availability of a wide selection of activities	31	47	57	48
Spending time in the home of a resident	40	45	31	36
Experiencing a modern culture	27	32	53	33
Staying at luxury surroundings	34	36	55	34
Attending theatres, clubs or shows	32	42	67	38
Staying in accommodation unique to that country (e.g., guest ranch, lodge, etc.)	36	49	42	52
Seeing first hand what I learned in school	33	40	46	37
Roughing it	41	37	22	34
Participating in active outdoor sports	23	42	41	48
Travelling in a group tour	38	39	37	38
Enjoying Alpine (downhill) skiing or snowboarding	14	17	38	46

Source: Quantitative Survey Q.21

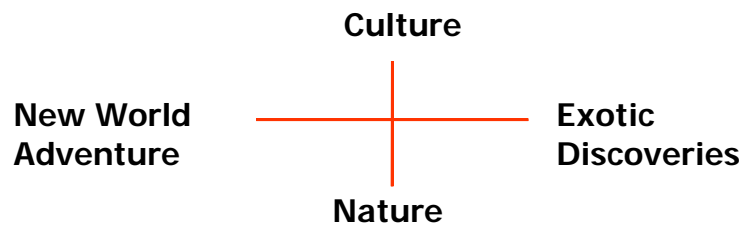
Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, experiences or anything else that you have seen,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

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



3.15 Perceptual Brand Map

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



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

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

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

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

Brand Positioning

Australia

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

U.S.A

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



3.15 Perceptual Brand Map

S.E. Asia

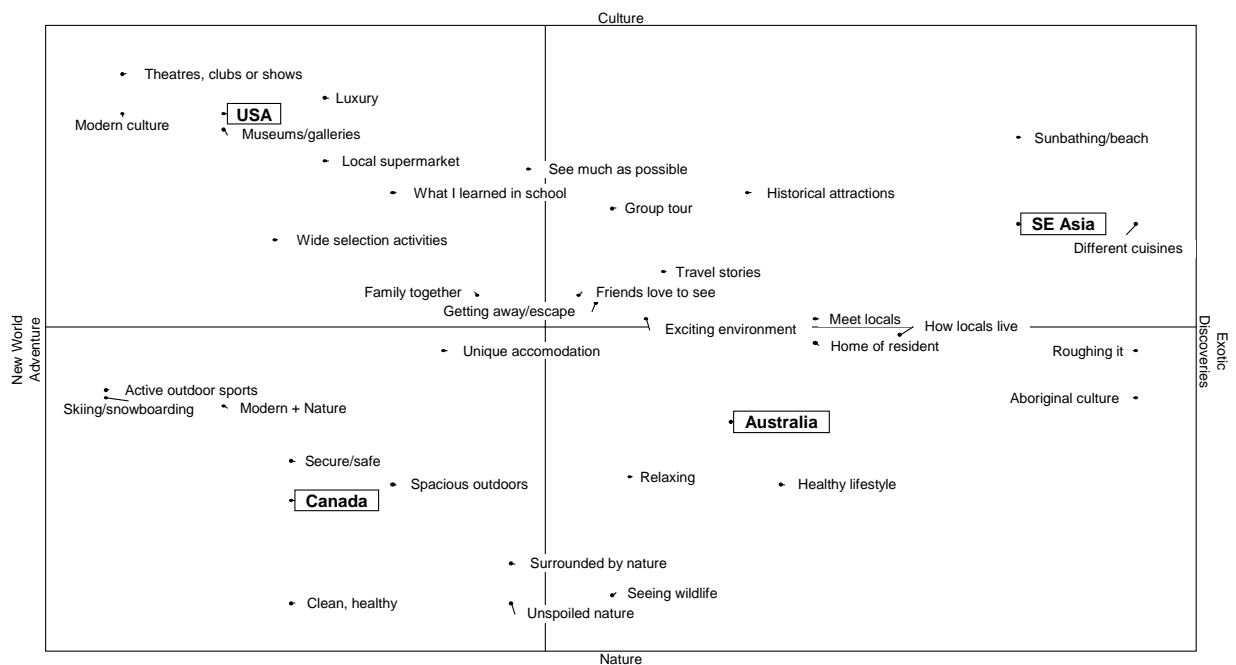
In the Northeast quadrant, SE Asia is associated with sun, beaches and different cuisines.

Canada

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

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

EXHIBIT SECTION 3-15: BRAND ATTRIBUTE MAP



Source: Quantitative survey Q.21

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



3.16 Germany -- Product Benefit Laddering

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

The hierarchy process:

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

For Germans, the Canadian vacation experience at the product/activity level is primarily nature focused along with being in an easy, friendly place.

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

- Release of stress/decompression
- Freedom/emancipation
- Switch off and reflect

At the highest order, the Value received is:

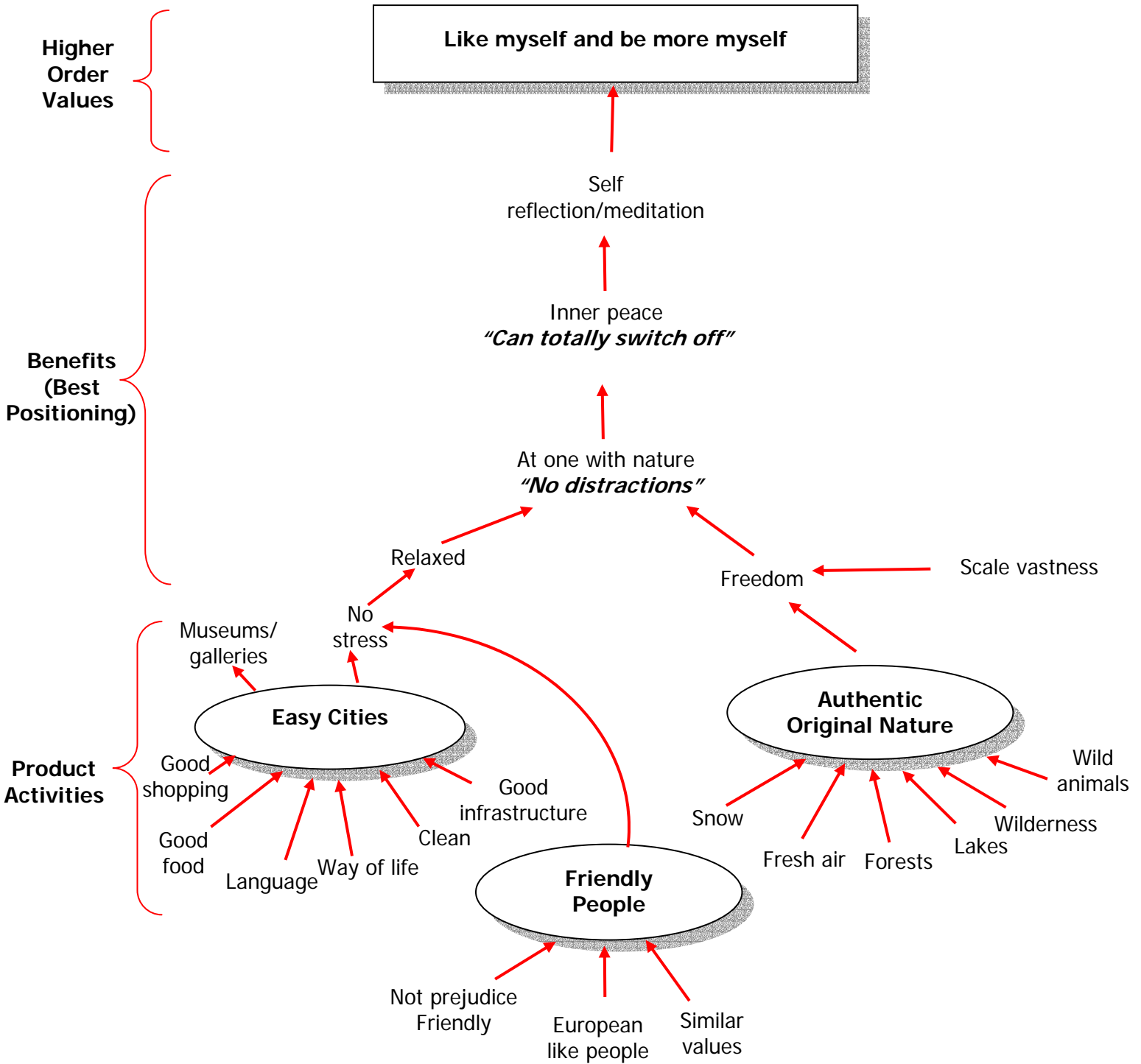
- The opportunity “to be more like myself”, a state lost in today’s life in Germany.

Implications

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



3.16 Germany -- Product Benefit Laddering



Section 4: Destination Trip Profile

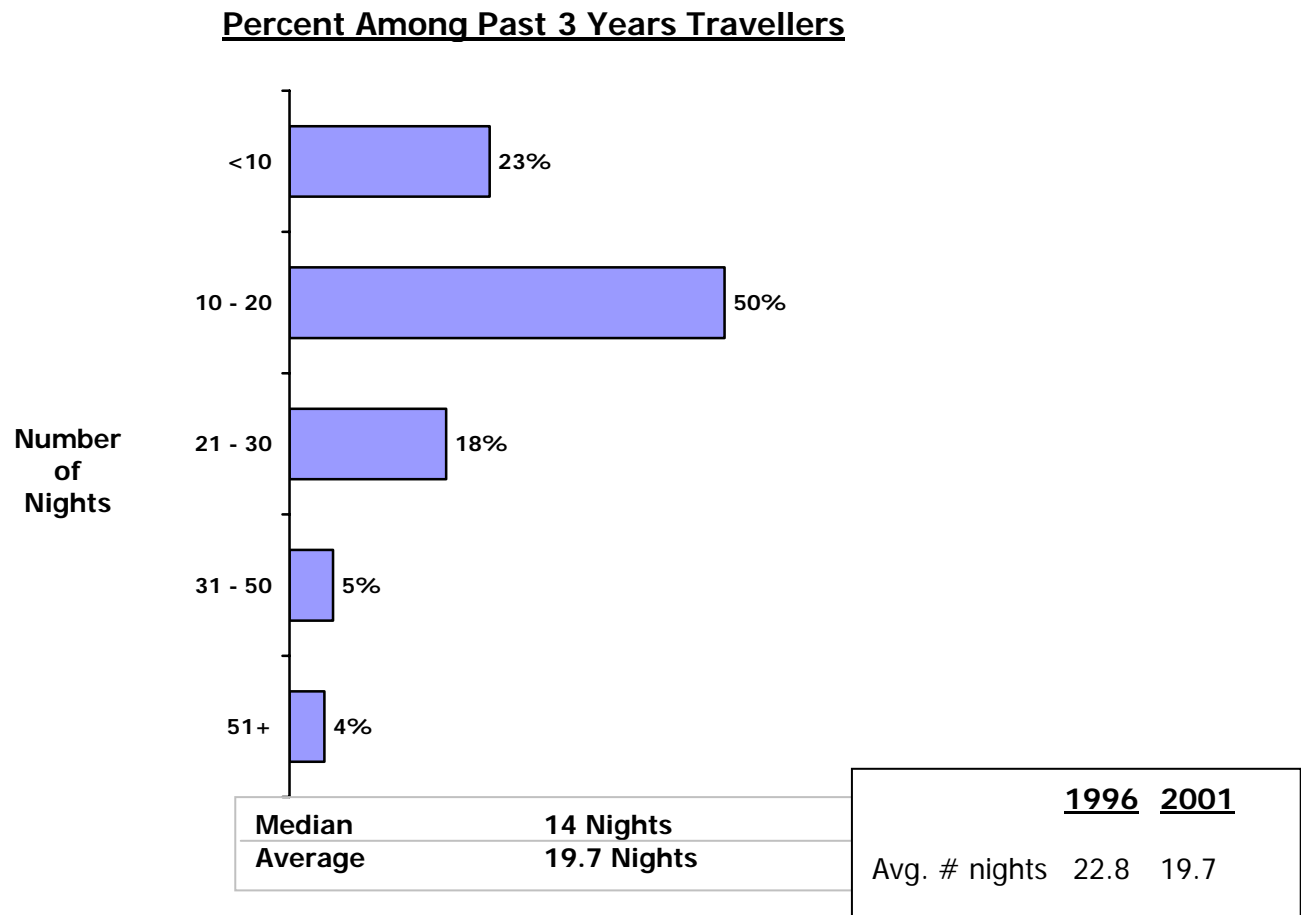


4.1 Duration

Germans often have 5 to 6 weeks vacation each year and, consequently, taking a 2 to 3 week vacation is not an issue.

The average long-haul trip lasts 19.7 nights. This is unchanged from 2001 (19.7) but both slightly down from 1996 (22.8 nights).

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



Source: Quantitative Survey Q.10a¹

¹ Base: n=1,916

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



4.2 Duration – By Destination

The average duration of a trip to Canada is 22.8 nights, quite typical of journeys to long-haul destinations. This is up from 2001 (18.8 nights) and 1996 (20.1).

Some visit the US on the same trip (discussed later). However, on average, as much as 2 weeks are spent in Canada (15.4 of those 22.8 nights).

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

	Percent Among Travellers Visiting Each			
	Asia	Turkey	U.S.	Canada
	(412) %	(354) %	(567) %	(692) %
<u>Number of Nights</u>				
<10	15	35	17	19
10 – 20	51	52	43	48
21 – 30	18	6	25	23
31 – 50	11	4	7	5
51+	6	2	7	5
Median of nights	15	12	18	15
Average # of nights	22.4	15.7	25.0	22.8

Canada
1996 2001
Avg. 20.1 18.8

Source: Quantitative Survey Q.10a

↓

<u>Nights Spent in Canada</u>	
	#
Median	12
Average	15.4

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

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



4.3 Multi-Country Visits

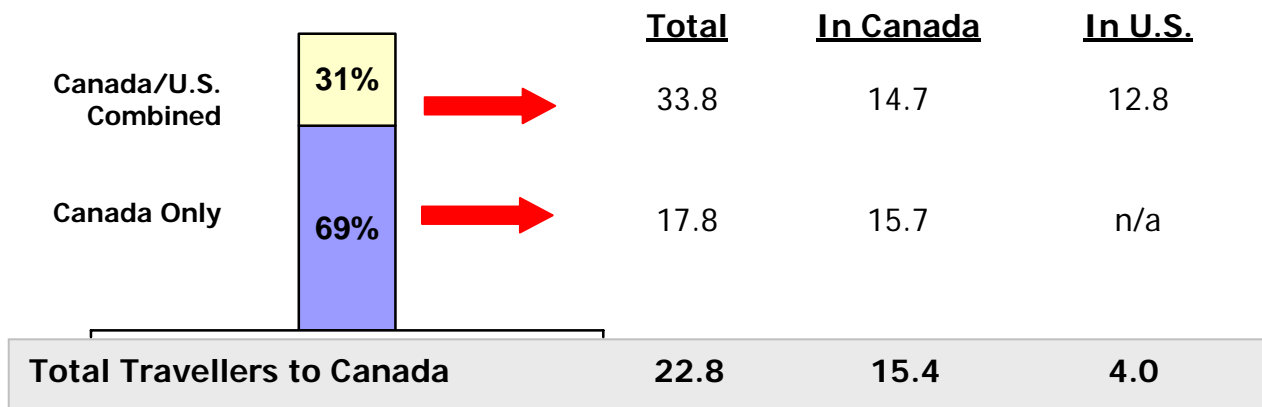
Three in ten German travellers are combining a trip to Canada with a stay in the US.

And, when they do, they tend to stay 2 weeks in Canada and 2 weeks in the US. Given that those staying only in Canada are also spending about 2 weeks in this country, it suggests that vacation product should be geared to that length of stay.

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

Among Past 3 Years Travellers to Canada

% Visited



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

¹ Base: n=692

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

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

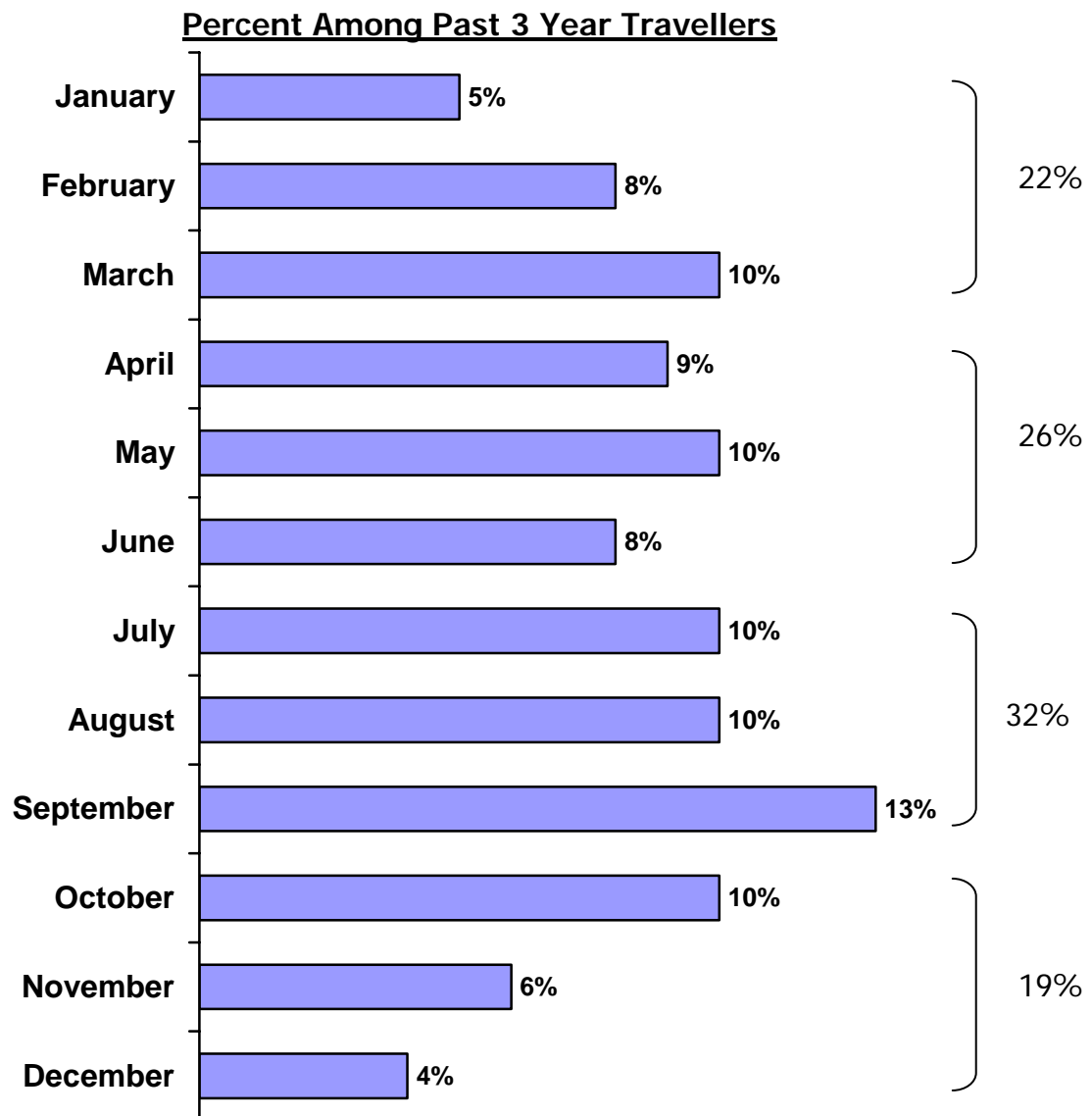
10.c IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in the United States on that trip, if any?



4.4 Time of Travel

There is no truly dominant season for German travellers. They travel actively from February to October.

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



Source: Quantitative Survey Q.11¹

¹ Base=n=1,916

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



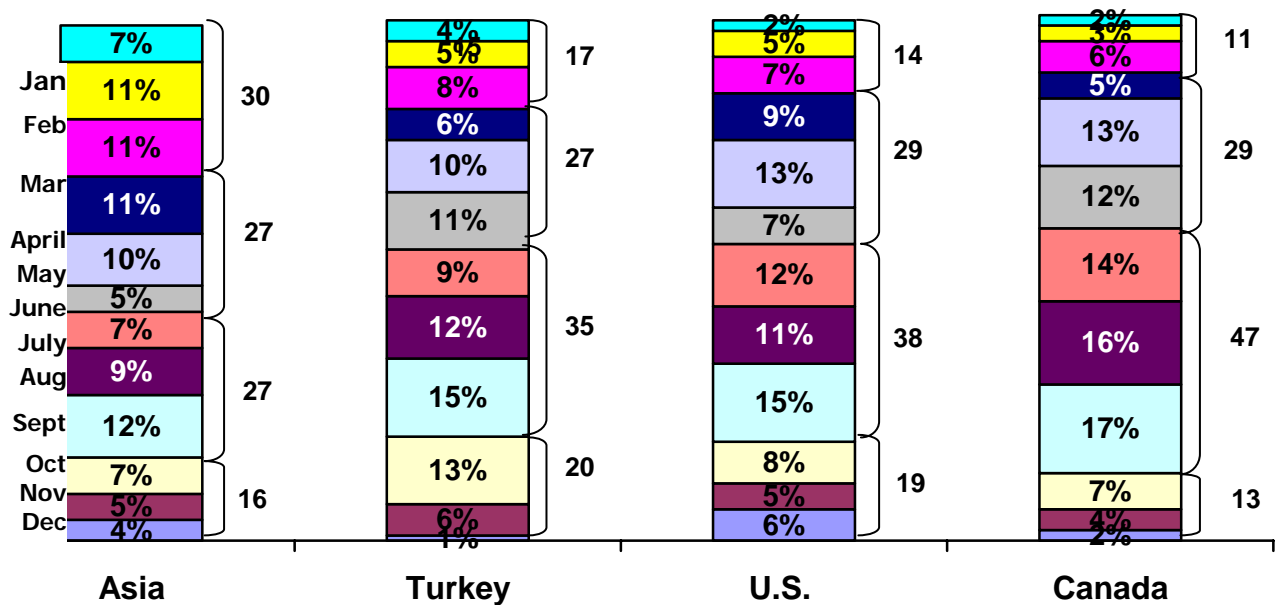
4.5 Time of Travel – By Destination

May to September is the preferred time of travel to Canada. This is similar to the US trip pattern.

Asia is common in the winter and spring and again in September.

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

Percent Among Travellers Visiting Each Destination



Source: Quantitative Survey Q.11

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

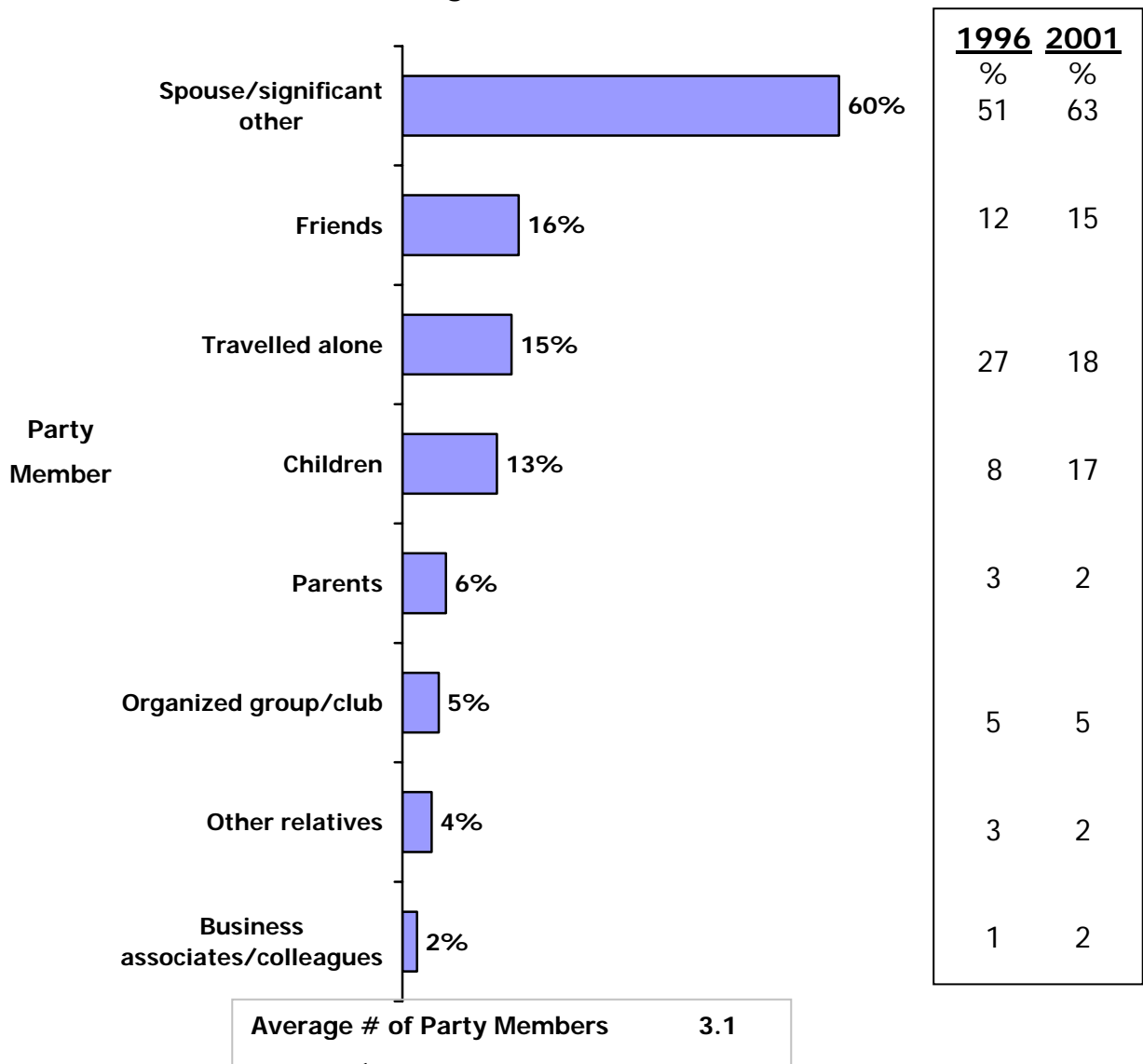


4.6 Party Size and Composition

Only 13% of German long-haul travellers take children along. Most travel as couples (60%). This is virtually identical to 2001 when 63% traveled as couples, 17% with children.

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

Percent Among Past 3 Year Travellers



Source: Quantitative Survey Q.12, 13a¹

¹ Base=n=1,916

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

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



4.7 Party Size and Composition – by Destination

Canada and the US tend to attract more solo travellers than other popular destinations (1 in 5). Otherwise, the most common travel companion is one's spouse or significant other.

In terms of change, there is no consistent trend for Canada between 1996 and 2007. The pattern here is quite typical.

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

	Percent Among Travellers Visiting Each				Canada	
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %	1996 %	2001 %
<u>Party Member</u>						
Spouse/significant other	62	70	53	51	54	63
Friends	16	14	18	13	11	8
Travelled alone	14	8	21	22	28	21
Children	12	20	11	14	7	20
Parents	6	6	6	8	3	2
Organized group/club	6	4	4	3	2	5
Other relatives	3	2	5	3	3	2
Business associates/colleagues	3	2	3	5	2	3
Average # of party members	3.4	2.9	3.0	3.4		

Source: Quantitative Survey Q. 12, 13a

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

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

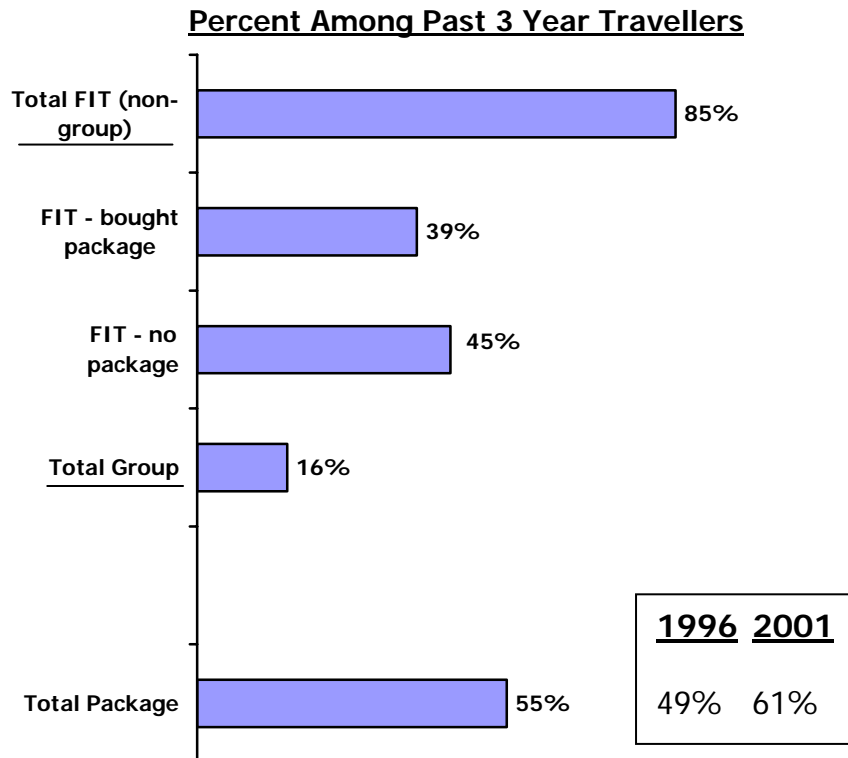


4.8 Travelled as FIT vs. Group

FIT dominates German long-haul travel (85%). However, over half do buy packages (39% an FIT package, 16% a group).

In total, 55% were on a package (group or FIT). This is down slightly from 2001 (61%), but both up from 1996 (49%).

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



Source: Quantitative Survey Q.16,17a¹

¹ Base: n=1,916

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

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



4.9 Travelled as FIT vs. Group – By Destination

Packages are very popular to Turkey, and to a lesser extent Asia. Only 36% of trips to Canada are on a package. Nine in ten to Canada are FIT—mostly no package (64%).

For Canada, the package activity (36%) is down from 2001 (52%), but similar to a politically more stable year-- 1996 (32%).

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

	Percent Among Travellers Visiting Each				
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %	
<u>Travelled as:</u>					
<u>Total FIT (non-group)</u>	<u>81</u>	<u>80</u>	<u>88</u>	<u>91</u>	
Total FIT – bought package	38	64	20	27	
Total FIT – no package	43	15	68	64	
<u>Total Group</u>	<u>19</u>	<u>21</u>	<u>12</u>	<u>9</u>	
<u>Total Package</u>	<u>57</u>	<u>87</u>	<u>32</u>	<u>36</u>	Canada 1996 2001 32% 52%

Source: Quantitative Survey Q.16,17a

- Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?
- Q.17a On that trip, did you buy a package that included airfare and accommodation?



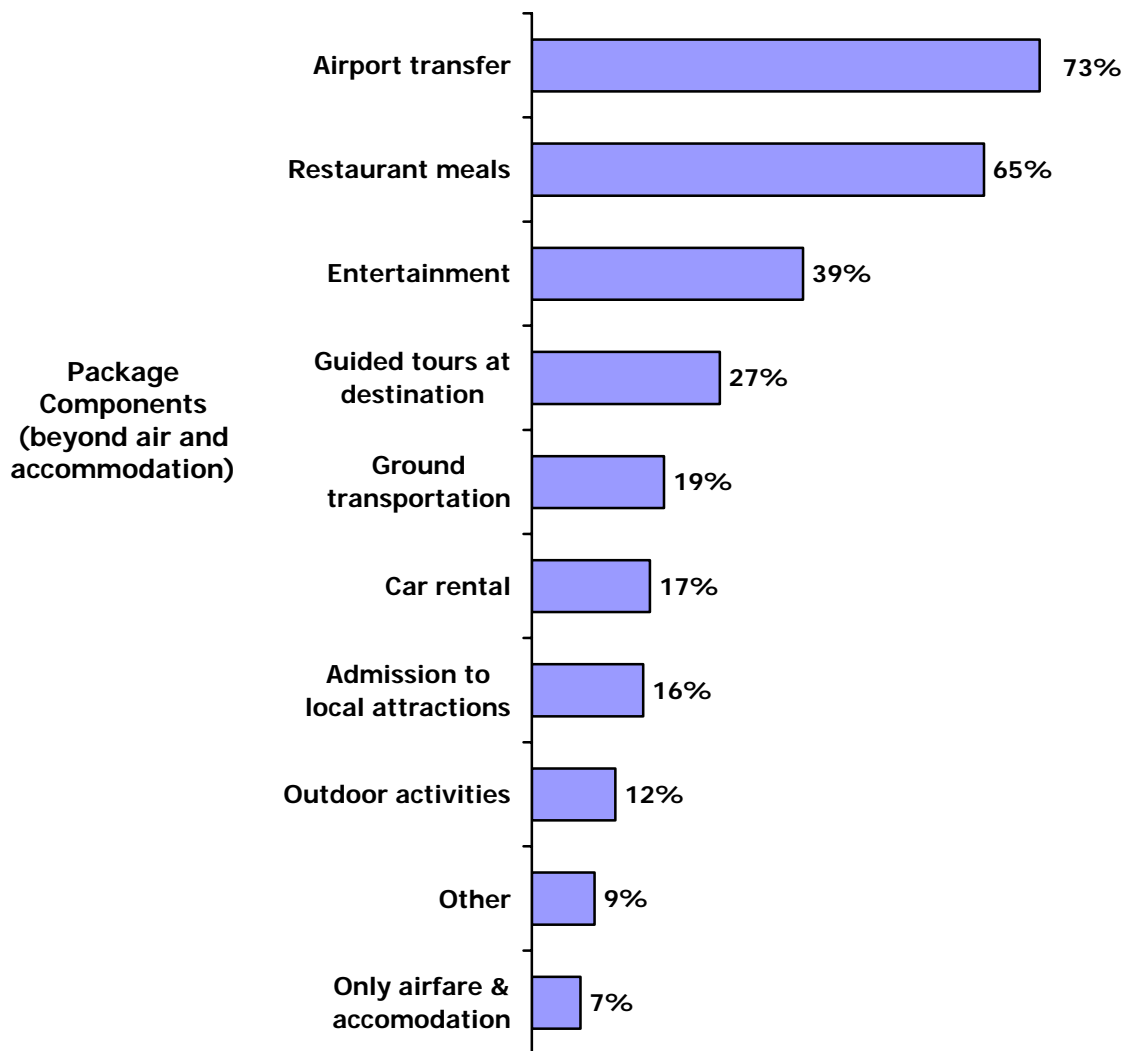
4.10 FIT Package Components

The 39% who bought an FIT package (air and accommodation) on their most recent long-haul trip usually include airport transfers and a significantly high 65% include restaurant meals.

Other components are considerably less common.

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

Percent Among Those Who Travelled on FIT Package



Source: Quantitative Survey Q.17b¹

¹ Base: n=700



4.11 FIT Package Components – By Destination

Canadian packages tend not to include meals (only 34% of FIT packages do) which may represent an opportunity, given their popularity in other destinations.

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

Package Components (beyond air/accommodation)	Percent Among Those Who Travelled on FIT Package			
	Asia	Turkey	U.S.	Canada
	(160) %	(224) %	(118) %	(173) %
Airport transfers	63	79	53	61
Restaurant meals	52	82	31	34
Entertainment	20	54	22	19
Guided tours at destination	24	32	27	25
Ground transportation between overnight destinations	12	20	17	15
Car rental	23	5	45	43
Admission to local attraction	15	19	23	21
Outdoor activities	15	12	12	10
Other	9	8	6	6
Only airfare and accommodation	9	6	15	12

Source: Quantitative Survey Q.17b¹

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

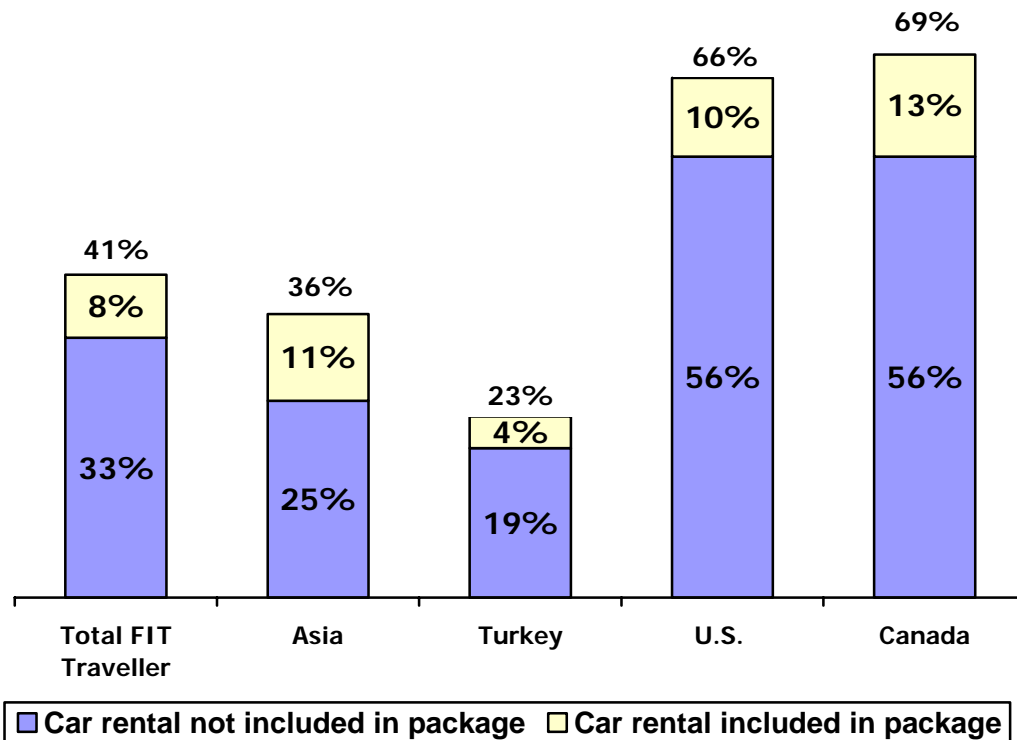


4.12 FIT Car Rental

Renting a car is very common in Canada and the US. Note that most rentals in Canada are not part of a package. Clearly non-package FIT travellers are picking up cars on arrival and proceeding on their own.

EXHIBIT SECTION 4-1 2: FIT CAR RENTAL

Percent Among FIT Travellers Visiting Each Destination



Source: Quantitative Survey Q.17b,c¹

¹Base: n=1,670

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

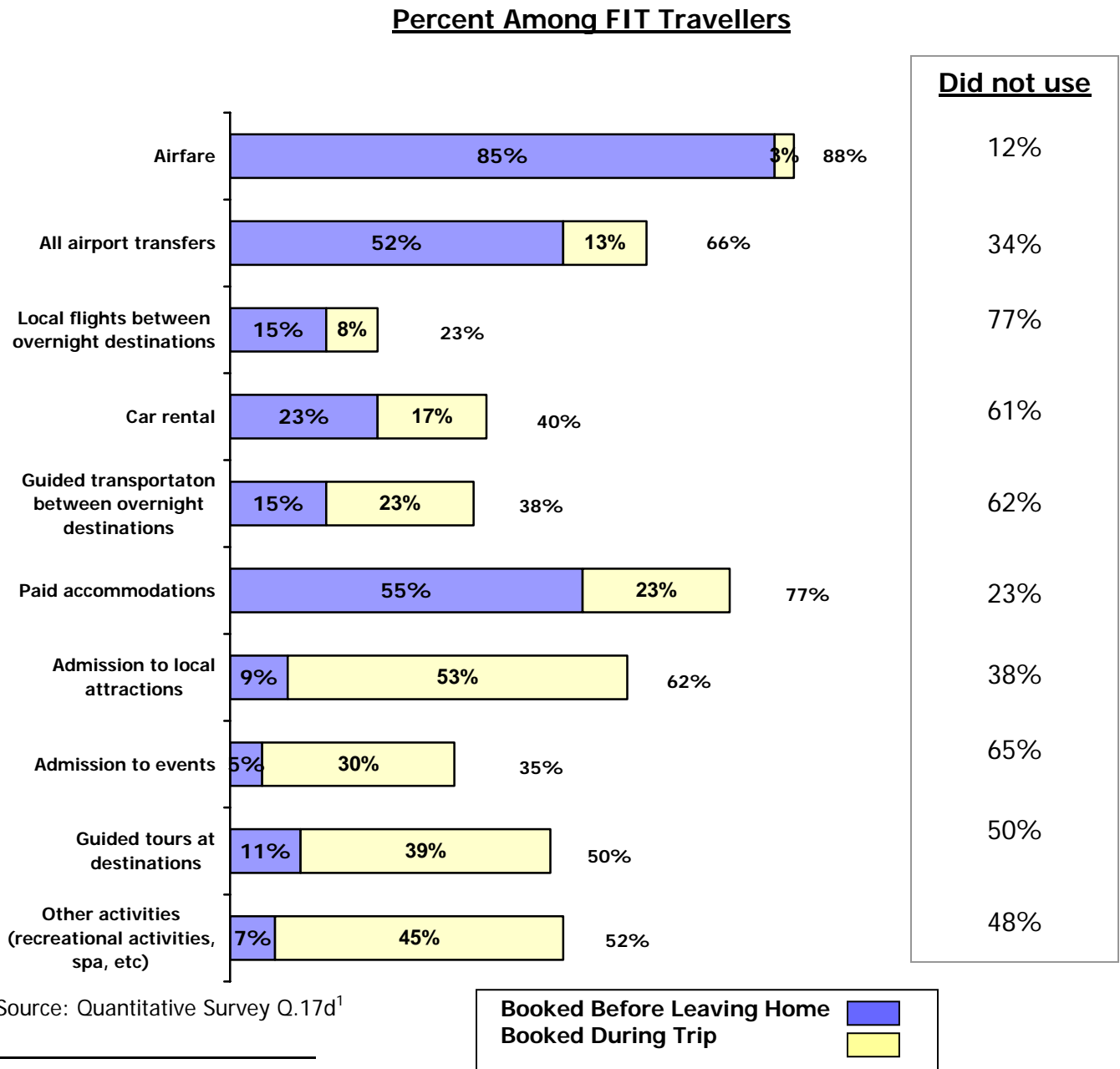
17c) (IF NO AT Q.17A OR IF CAR RENTAL NOT CHECKED IN Q.17B, ASK Q.17C. OTHERS SKIP TO Q.18) Did you rent a car on that trip?



4.13 FIT Trip Components Booked Before Departure vs. During Trip

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

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



¹ Base: n=1,670

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



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

The pattern for Canada is quite typical.

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

	Percent Among FIT Travellers Visiting Each Destination			
	Asia (348) %	Turkey (288) %	U.S. (506) %	Canada (620) %
<u>Airfare</u>	<u>88</u>	<u>82</u>	<u>93</u>	<u>89</u>
Booked before leaving home	82	80	90	85
Booked during trip	5	1	4	4
Did not use	12	18	7	11
<u>Airport Transfers</u>	<u>72</u>	<u>70</u>	<u>60</u>	<u>60</u>
Booked before leaving home	53	65	44	42
Booked during trip	19	6	15	19
Did not use	28	30	41	40
<u>Local Flights Between Overnight Destinations</u>	<u>32</u>	<u>13</u>	<u>26</u>	<u>31</u>
Booked before leaving home	22	10	19	24
Booked during trip	11	3	7	8
Did not use	68	87	74	69
<u>Car Rental</u>	<u>34</u>	<u>21</u>	<u>62</u>	<u>67</u>
Booked before leaving home	16	7	44	47
Booked during trip	18	14	18	20
Did not use	66	79	38	33
<u>Ground Transportation Between Overnight Destinations</u>	<u>50</u>	<u>31</u>	<u>37</u>	<u>36</u>
Booked before leaving home	17	18	13	14
Booked during trip	33	13	24	22
Did not use	50	69	63	64
<u>Paid Accommodation</u>	<u>78</u>	<u>74</u>	<u>78</u>	<u>75</u>
Booked before leaving home	52	67	46	41
Booked during trip	26	7	32	33
Did not use	21	26	22	25



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

	Percent Among FIT Travellers Visiting Each Destination			
	Asia (348) %	Turkey (288) %	U.S. (506) %	Canada (620) %
<u>Admission to Local Attractions</u>	<u>66</u>	<u>54</u>	<u>71</u>	<u>62</u>
Booked before leaving home	11	11	8	8
Booked during trip	55	43	63	54
Did not use	34	46	29	38
<u>Admission to Events</u>	<u>37</u>	<u>26</u>	<u>44</u>	<u>41</u>
Booked before leaving home	6	4	5	7
Booked during trip	31	22	40	34
Did not use	63	74	56	59
<u>Guided Tours at Destinations</u>	<u>54</u>	<u>59</u>	<u>44</u>	<u>38</u>
Booked before leaving home	14	14	7	9
Booked during trip	40	45	37	29
Did not use	46	42	56	62
<u>Other Activities (Recreational Activities, Spa, etc.)</u>	<u>54</u>	<u>49</u>	<u>55</u>	<u>50</u>
Booked before leaving home	9	8	6	5
Booked during trip	45	41	49	44
Did not use	46	51	45	51

Source: Quantitative Survey Q. 17d

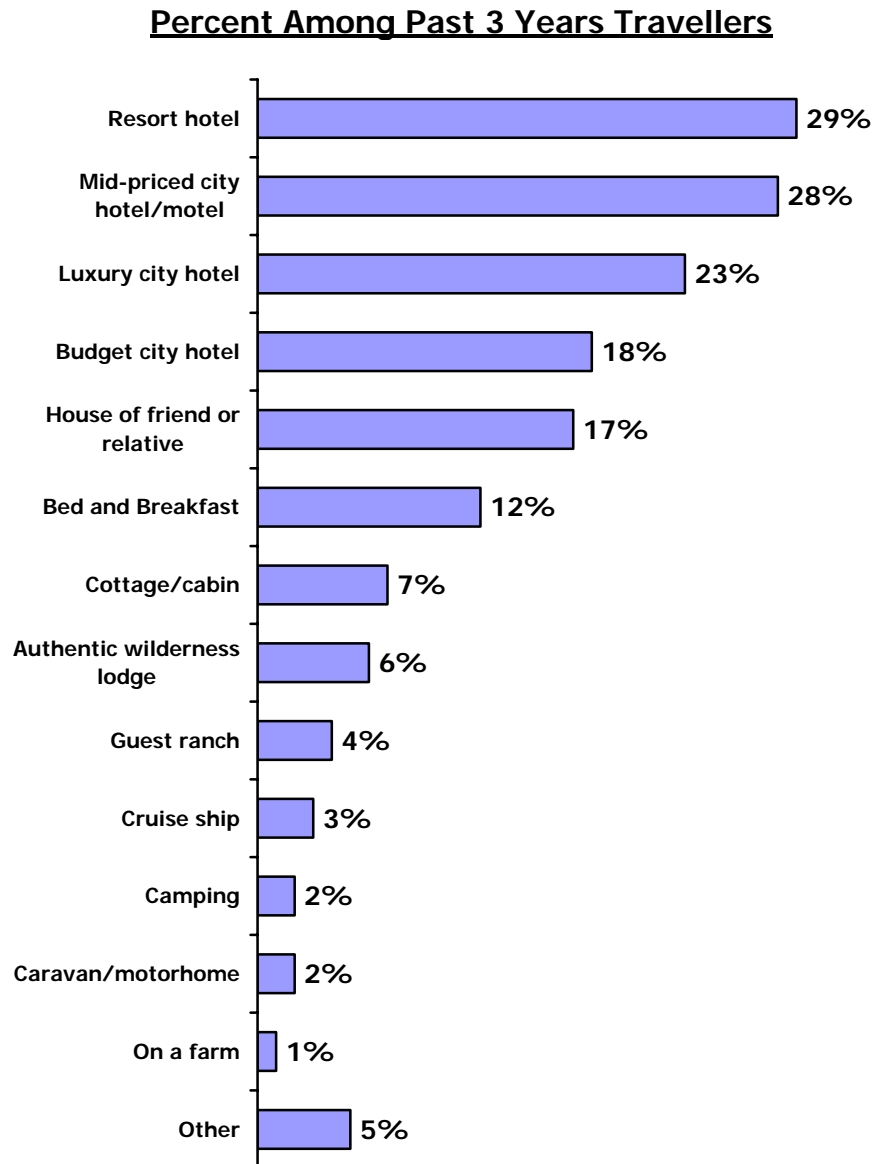
Q.17d On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?



4.15 Accommodation

Germans are not locked into luxury accommodation. With city stays they often stay in mid-priced properties and budget hotels.

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



Source: Quantitative Survey Q.18¹

¹ Base: n=1,916

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



4.16 Accommodation-By Destination

German travellers to Canada show special interest in B&B's, authentic wilderness lodges and motor homes.

In cities, they stay in a mix of hotel types.

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

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
<u>Accommodation Type</u>				
Resort	26	41	18	21
Mid-priced city hotel/motel	26	28	37	30
Luxury city hotel	34	23	22	22
Budget city hotel	22	8	26	24
Home of friend or relative	12	7	25	23
Bed and Breakfast	9	3	16	18
Cottage/cabin	7	3	8	8
Authentic wilderness lodge	6	1	6	10
Guest ranch	3	*	2	5
Cruise ship	3	1	3	2
Camping	2	1	3	6
Caravan/motor home	1	1	2	9
On a farm	2	*	*	3
Other	4	2	5	4

Source: Quantitative survey Q.18

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

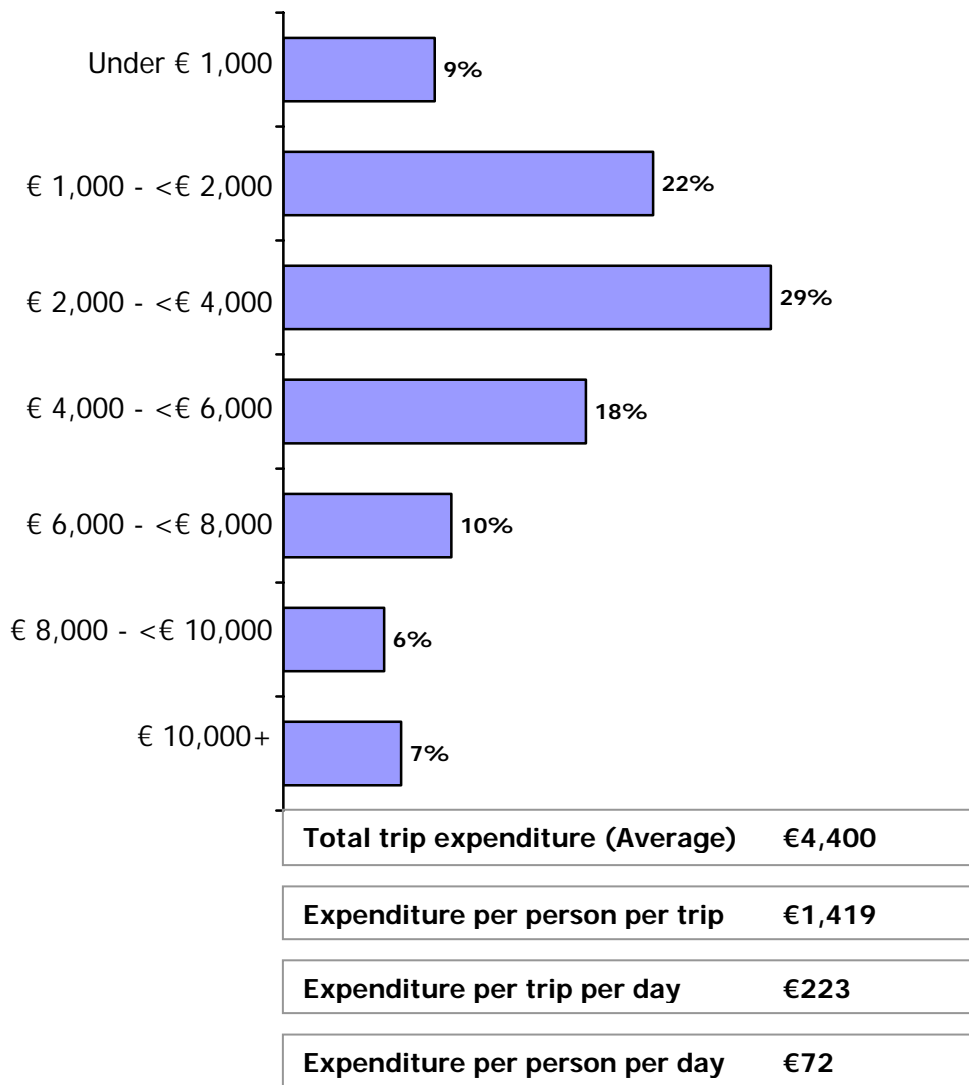


4.17 Trip Expenditure

The average trip expenditure is 4,400 Euros.

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

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19b¹

¹ Base: n=1,916

€100=CAD \$146.71 (Bank of Canada exchange rate– Nov. 21, 2007)



4.18 Trip Expenditure – By Destination

The expenditure per trip is lowest with Turkey, where deals prevail (as discussed earlier). In Canada, it is 5,700 Euros, relatively high on a per day basis (250 Euros).

EXHIBIT SECTION 4-18: TRIP EXPENDITURE – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
<u>Expenditure</u>				
Under €1,000	2	21	4	3
€1,000 - <€2,000	14	36	19	13
€2,000 - <€4,000	34	29	26	28
€4,000 - <€6,000	21	7	17	26
€6,000 - <€8,000	12	4	15	13
€8,000 - <€10,000	7	2	8	6
€10,000+	11	2	10	12
Total Trip Expenditure (Avg) €	5,400	2,600	5,300	5,700
Expenditure per person per trip €	1,588	897	1,767	1,676
Expenditure per trip per day €	241	166	212	250
Expenditure per person per day €	71	57	71	74

Source: Quantitative Survey Q.19b

€100=CAD\$146.71 (Bank of Canada exchange rate – Nov 21, 2007)

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

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

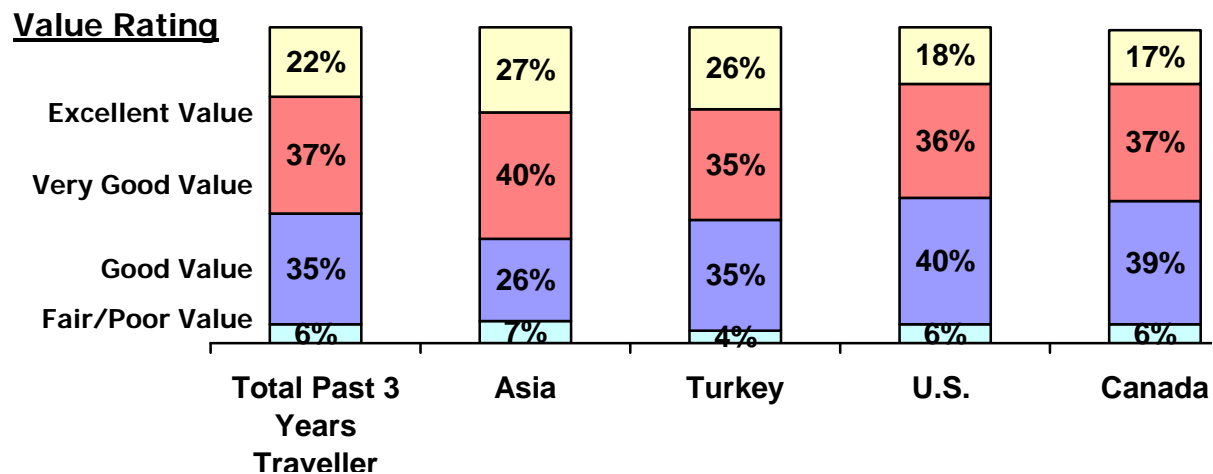


4.19 Value for Money

In spite of the above average expenditure, Canada receives good value ratings. However, top marks go to Asia and Turkey for value.

EXHIBIT SECTION 4-19: VALUE FOR MONEY

Percent Among Travellers Visiting Each Destination



<u>Top Two Boxes</u>	
Excellent/Very Good	59% 67% 61% 54% 55%

Source: Quantitative Survey Q19c

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

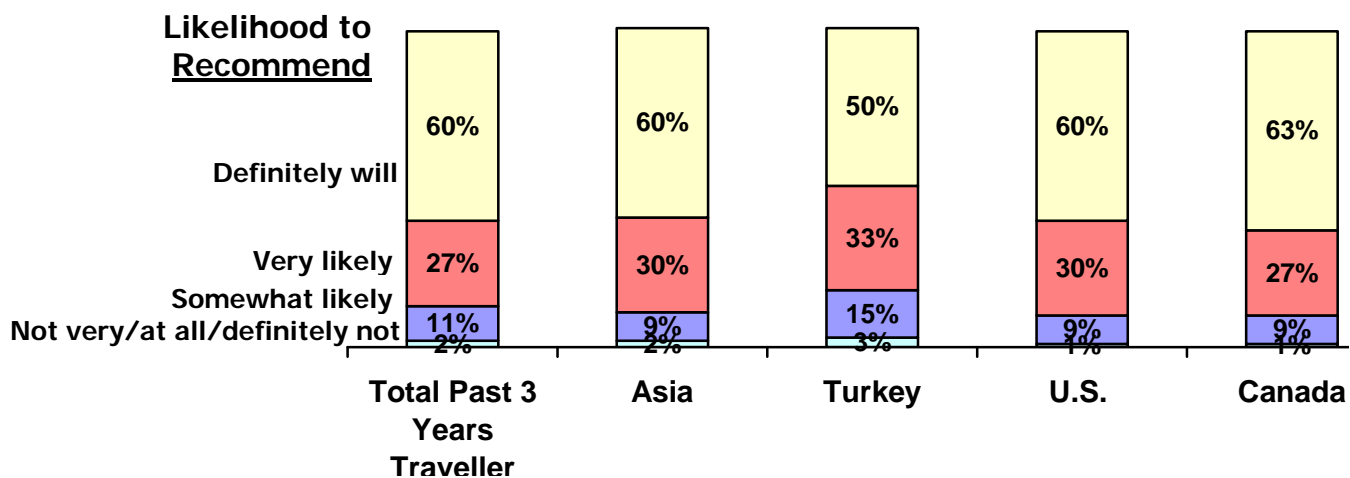


4.20 Likelihood to Recommend Destination to Other

Virtually no one would not recommend Canada to others, confirming solid trip satisfaction. However, this is not atypical of other destinations traveled to.

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

Percent Among Travellers Visiting Each Destination



<u>Top Two Boxes</u>					
Definitely/very likely	87%	90%	82%	91%	90%

Source: Quantitative Survey Q19d

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



Section 5: Market Segmentation

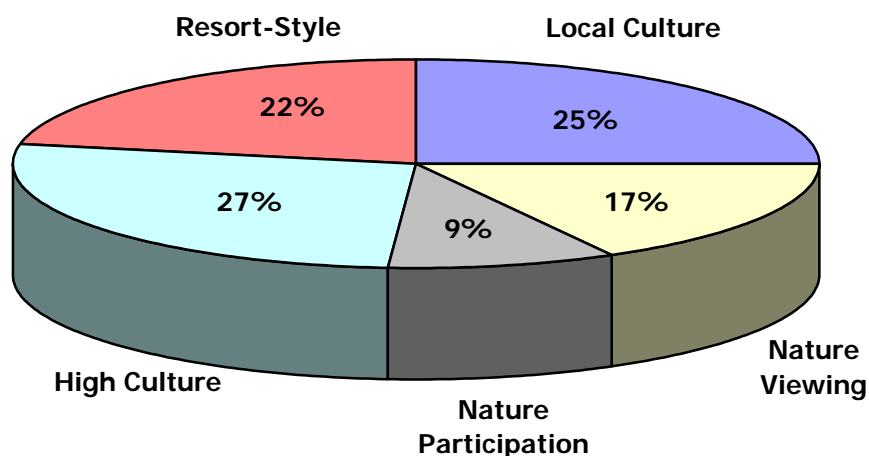


5.1 Segmentation Analysis

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

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

EXHIBIT SECTION 5-1: SIZE OF MARKET SEGMENT



Source: Quantitative Survey Q.20¹

¹ Base= Past/Future Travellers (n=2,548)

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



5.2 Segment Characteristics

High Culture (27%)

This segment is attracted to city life and culture.

Local Culture (25%)

Meeting and interacting with local people and experiencing how they live at the grassroots level is the key focus of this group.

Resort Style (22%)

Relaxation, sun and luxury dominate here.

Nature Viewing (17%)

Being surrounded by beautiful nature and taking it all sensually drives this segment.

Nature Participation (9%)

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



5.2 Segment Characteristics

EXHIBIT SECTION 5-2: SEGMENT CHARACTERISTICS

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



5.2 Segment Characteristics

	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort-Style</u>	<u>Local Culture</u>
Profile Skews					
Gender					
Male	55	61	52	46	51
Female	45	39	48	54	50
Marital Status	Married with no young children at home	Mixed of married/living together and singles	Married with no young children at home	Married with children	Married with no young children at home
Age					
18 to 29	19	47	16	28	15
30 to 39	18	27	11	23	18
40 to 49	23	14	14	21	20
50-59	15	8	15	11	22
60+	25	5	44	16	26
Household Income (monthly net €)					
Under €1,800	20	18	21	22	24
€1,800 - <€2,300	15	14	17	19	12
€2,300 - <€2,800	12	14	12	10	13
€2,800 - <€3,800	19	19	16	15	20
€3,800 +	16	21	14	16	14
Recent Trip Expenditure (€)					
Under €2,000	30	29	32	37	23
€2,000 - <€4,000	31	31	28	28	28
€4,000 - <€6,000	17	20	15	14	23
€6,000 - <€8,000	9	7	9	11	11
€8,000+	13	14	15	10	15
Average (€ Euro)	4,300	4,300	4,600	4,000	4,700

High Culture

- Skews older (60+)

Local Culture

- Appeals to a broad age and income range

Resort Style

- The family market dominates

Nature Viewing

- Appeals to a broad age and income range

Nature Participation

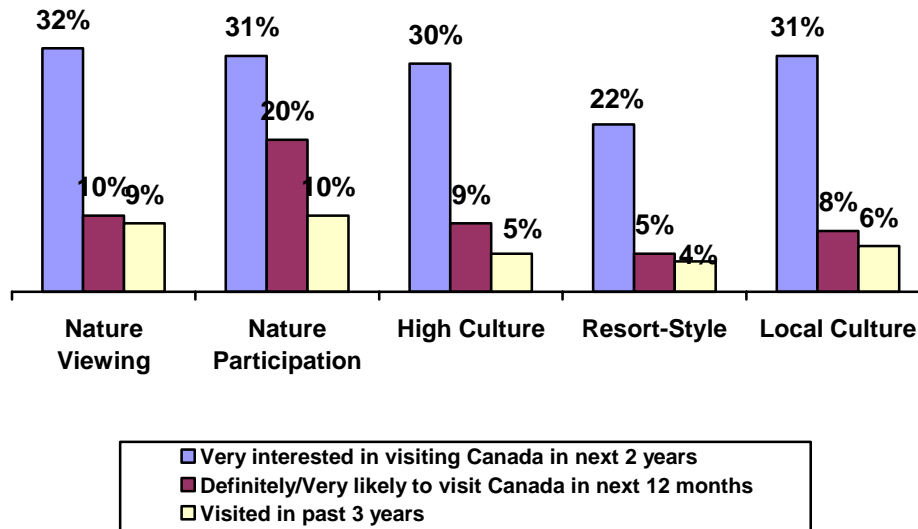
- Definitely under 40, often under 30



5.3 Current Plans to Visit Canada

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

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



Source: Quantitative Survey Q.7, 22, 23¹

¹ Base=Past/Future Travellers (n=2,548)

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

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

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



5.4 Ideal Trip to Canada by Segment

Here is the ideal Canadian trip for each of the 2 key target segments:

Nature Viewing

This segment wants a wide and varied nature viewing experience in Canada—including seeing rivers and waterfalls, wilderness areas and observing wildlife. They like the notion of staying in resorts close to nature (seaside, lake, mountain, etc), but also express significant interest in wilderness cabins or lodges, B&B's and motor homes which get them closer to the authentic, away from urban infrastructure.

July to September is the preferred season, 17.8 nights the ideal duration.

Key provinces of interest include BC, Ontario and Quebec, but there is a good deal of interest in the Yukon, NWT and Newfoundland and Labrador as well.

Nature Participation

As a younger group, these individuals show less interest in nature observation and greater interest in activity—canoeing, kayaking, cycling, snowmobiling and serious skiing.

However, in spite of the quest for outdoor activity, this segment also wants to indulge themselves—with wine/culinary tours, spa visits and nightlife.

Resorts are the preferred accommodation, July to September the best months, 15.7 nights the ideal duration, BC, Quebec and Ontario the desired provinces to visit.



5.4 Ideal Trip to Canada

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

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort-Style</u>	<u>Local Culture</u>
	(425) %	(238) %	(511) %	(483) %	(572) %
<u>Ideal Next Trip</u>					
<u>Season</u>					
January-March	3	9	4	5	3
April-June	23	27	23	27	23
July-September	64	54	63	57	63
October-December	9	10	10	10	10
<u>Duration</u>					
# of nights (avg)	17.8	15.7	15.9	15.5	19.0
<u>Provinces Likely to Visit</u>					
Ontario	52	36	68	68	63
B.C.	62	44	62	55	60
Quebec	44	42	59	51	58
Alberta	28	23	28	24	28
Yukon	26	10	22	13	27
Newfoundland and Labrador	23	16	22	18	23
North West Territories	19	12	15	16	18
Nova Scotia	9	11	8	8	14
Saskatchewan	10	14	10	6	11
Manitoba	8	14	9	7	13
Nunavut	8	4	7	5	11
PEI	10	7	8	10	15
New Brunswick	7	11	5	7	9
<u>Would Also Visit Overnight or Longer</u>					
USA	53	61	53	58	44
Other countries	19	28	16	19	16
Canada only	40	24	39	35	47
<u>Type of Tour</u>					
<u>Group Tour</u>	<u>17</u>	<u>24</u>	<u>29</u>	<u>16</u>	<u>13</u>
Prefer: All days organized	9	15	19	8	5
Many free days	8	9	10	9	7
<u>FIT (non-group)</u>	<u>83</u>	<u>76</u>	<u>71</u>	<u>84</u>	<u>87</u>
Prefer: Package	35	35	32	49	29
Non-Package	48	42	39	35	58

Source: Quantitative Survey Q.25

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



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort-Style</u>	<u>Local Culture</u>
	(425) %	(238) %	(511) %	(483) %	(572) %
Transportation Between Centres					
Rental car	80	76	73	84	78
Air	63	68	67	66	63
Rail	47	43	64	49	56
Motor coach	37	36	50	43	40
Motor home/camper	43	30	25	33	47
Private car	19	29	15	17	17
Accommodation					
Lakeside resort	39	33	32	36	34
City hotel	25	31	45	34	22
On a ranch	20	11	20	23	29
Seaside resort	27	26	23	30	27
Bed and Breakfast	21	21	27	21	30
Authentic wilderness cabin or lodge	19	8	14	12	27
Mountain resort	18	16	13	9	18
Caravan/motor home	13	5	9	10	17
Home of friend or relative	5	7	8	6	13
Canadian Spa	6	5	6	13	1
Ski resort	4	15	1	5	2
Coastal cruise ship	3	2	5	5	2
Camping	3	3	1	*	5
On a farm	3	1	2	2	3

*Less than 0.5%



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort-Style</u>	<u>Local Culture</u>
	(425) %	(238) %	(511) %	(483) %	(572) %
<u>Activities</u>					
Viewing rivers or waterfalls	92	67	96	94	97
Taking nature tours	90	70	94	89	97
Taking city tours	87	64	96	92	90
Visiting wilderness areas	88	55	89	81	93
Getting to know the local inhabitants	74	64	89	73	95
Visiting places of historical interest	78	63	94	79	87
Observing wildlife in their natural environment	86	56	87	77	91
Visiting small towns	79	62	90	75	91
Viewing mountains	87	60	88	75	85
Trekking in a nature area	82	60	78	70	87
Experiencing French Canadian culture and cuisine	75	66	84	79	87
Seeing beautiful beaches and coastlines	79	59	84	84	80
Aboriginal cultural experiences, celebrations, and attractions	64	52	81	60	85
Seeing old architecture	57	51	81	64	70
Taking a garden or flower tour	67	53	70	50	75
Visiting world heritage sites	61	48	83	61	71
Whale watching	67	51	64	63	68
Visiting museums or art galleries	46	53	80	53	57
Viewing Aurora Borealis (Northern Lights)	60	53	66	61	64
Attending festivals or fairs	45	51	65	59	64
Viewing autumn leaves	58	51	61	49	59
Seeing modern architecture	51	44	70	50	48
Taking a rail tour	46	46	64	44	52
Study English	49	54	46	54	48
Attending theatres, clubs or shows	36	54	63	55	41
Canoeing/kayaking/boating	40	56	32	39	48
Dog sledding	39	49	39	41	44



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort-Style</u>	<u>Local Culture</u>
	(425) %	(238) %	(511) %	(483) %	(572) %
<u>Activities</u>					
Attending rodeos	34	40	40	38	41
Trail riding on horseback	39	41	27	24	44
Taking a wine/culinary tour	30	48	41	36	29
Cycling	38	45	30	35	35
Snowmobiling	33	44	28	36	40
Visiting a spa	30	40	30	37	23
Visiting friends or relatives	20	36	25	18	26
Taking a cruise	24	35	20	24	15
Sports fishing	17	32	8	13	14
Visiting casinos	14	38	15	18	8
Downhill skiing or snowboarding	12	48	7	18	10
Heli/cat skiing	14	43	5	13	11
Golfing	8	30	8	7	5
Hunting	9	29	5	6	9

Source: Quantitative Survey Q.25

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



5.5 Segment Mapping

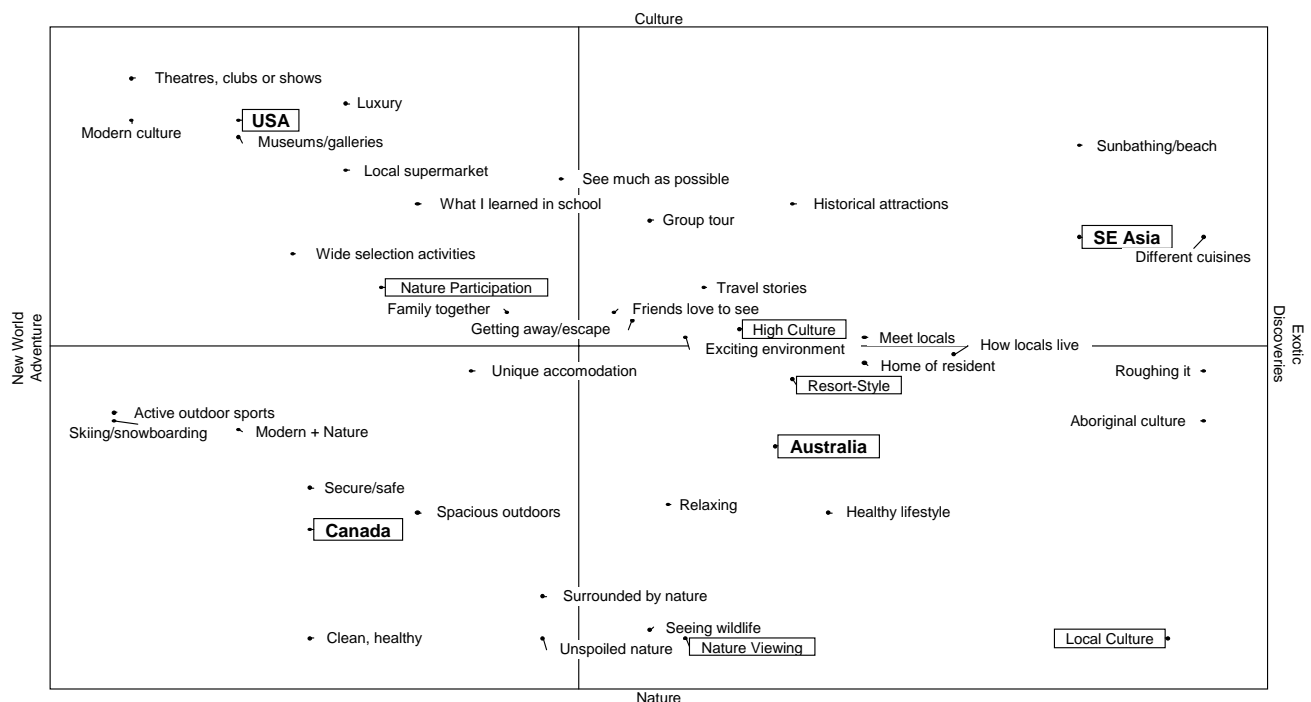
The following map illustrates that Canada is clearly in competition with the U.S. for the **Nature Participation** segment.

- This youthful segment wants excitement and fun as well as soft adventure.
- The U.S. image is much stronger here.
- This is further re-enforcement that Canada needs to broaden its image beyond a nature experience.

With the **Nature Viewing** segment Canada competes with Australia.

- Canada's advantage over Australia includes proximity and, of course, Australia is a minor destination for Germans, noted earlier.
- Clearly, the **Nature Viewing** segment is Canada's best target opportunity.

EXHIBIT SECTION 5-5: SEGMENT MAPPING



Section 6: Traveller Profile

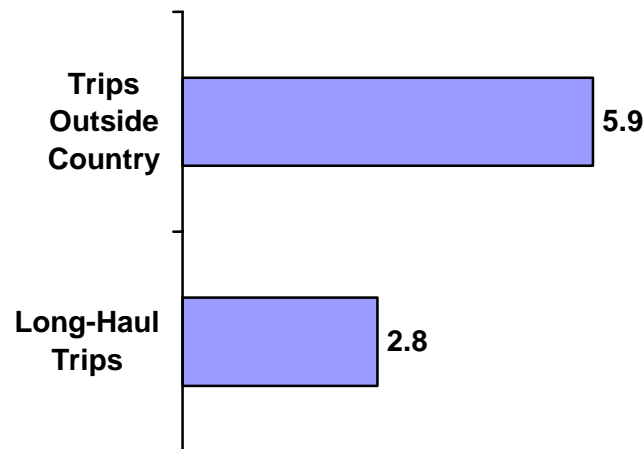


6.1 Trip Frequency

The German traveller took 5.9 trips outside their country during the past 3 years, half (2.8) long-haul.

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

Among Past 3 Years Travellers



Source: Quantitative Survey Q3c, 4¹

¹ Base= past 3 year travellers (n=1,916)

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

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



6.2 German Long-haul Travel Market Profile

Current visitors to Canada skew younger (77% under age 50) and from the Hamburg/ North Rhine regions.

Unlike other origin markets, retired individuals are not coming to Canada—likely because of an expectation of the physical activity required in such an outdoor environment.

As many as 36% have close friends or relatives in Canada. This is a reminder that these friends are key influencers in the travel decision process, as discussed elsewhere in the report.

From a trend perspective the Canadian visitor has shifted substantially younger—now 77% under 50, up from 63% in 2001.

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

	<u>Percent Among Travellers Visiting Each</u>				<u>Canada 2001</u> %
	<u>Asia</u> (412) %	<u>Turkey</u> (354) %	<u>U.S.</u> (567) %	<u>Canada</u> (692) %	
<u>Age</u>					
18 – 29	22	22	26	27	16
30 – 39	21	16	22	27	20
40 – 49	19	18	18	23	27
50 – 59	16	15	14	11	15
60+	23	29	21	13	22
<u>Gender</u>					
Male	58	48	52	54	55
Female	42	52	48	46	45
<u>City</u>					
Schleswig-Holstein/Hamburg/Lower Saxony/Bremen	19	18	16	24	
North Rhine	16	25	17	20	
Hesse/Rhineland/Saarland	15	11	19	15	
Baden-Wuerttemberg	15	12	15	11	
Bavaria	16	12	15	17	
Berlin	7	5	6	5	
Mecklenburg-Western Pomerania	5	8	5	4	
Thuringia/Saxony	6	9	5	4	
<u>Close friends/relatives in Canada</u>					
Yes	21	11	25	36	31
No	77	87	74	63	69



6.2 German Long-haul Travel Market Profile

	Percent Among Travellers Visiting Each				Canada 2001 %
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %	
<u>Marital Status</u>					
Married/living with someone	67	70	64	63	71
Single	20	17	27	30	17
Divorced/widowed/separated	12	13	7	6	11
<u>Household Composition</u>					
Adults only	69	72	74	69	69
With children <18	31	28	26	31	31
<u>Occupation</u>					
<u>Total employed</u>	<u>67</u>	<u>54</u>	<u>61</u>	<u>70</u>	
Semi or unskilled manual worker	4	4	1	4	
Skilled manual worker	9	12	6	8	
Supervisory or clerical / junior managerial / professional / administrative	16	14	18	19	
Intermediate managerial / professional / administrative	11	8	13	14	
Higher managerial / professional / administrative	7	2	6	8	
Self employed	14	8	13	13	
Employed part-time	6	7	3	4	
Student	8	8	13	13	
Housewife/husband	3	7	3	4	
Retired/semi-retired	18	24	18	9	
Other	4	6	5	4	



6.2 German Long-haul Travel Market Profile

	Percent Among Travelled on FIT Package			
	Asia	Turkey	U.S.	Canada
	(412) %	(354) %	(567) %	(692) %
<u>Education</u>				
Less than secondary/vocational school	18	28	22	16
Vocational continuing education	24	28	21	17
University	28	23	33	38
Graduate school	28	18	24	29
<u>Household Income (monthly net €)</u>				
Under €1,800	10	23	15	13
€1,800 - <€2,300	12	20	17	11
€2,300 - <€2,800	11	11	10	11
€2,800 - <€3,800	25	15	22	20
€3,800+	22	13	19	23

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

CAD Equivalent (Bank of Canada exchange rate, November 21, 2007)

<€1,800 = <\$2,641 CAD

€1,800 - <€2,300 = \$2,641 - \$3,374 CAD

€2,300 - <€2,800 = \$3,374 - \$4,108 CAD

€2,800 - <€3,800 = \$4,108 - \$5,575 CAD

€3,800+ = \$5,575+ CAD



Section 7: The Canadian Opportunity



7.1 Aspirational Destinations

Canada ranks 5th as a near term destination priority for German long-haul travellers. This is down from 3rd in 1996 and 2001.

The US ranks 1st which clarifies that the country as a significant competitor.

Note the rise in the Caribbean to 2nd spot from 10th in 1996.

EXHIBIT SECTION 7-1: LONG-HAUL DESTINATION PRIORITY

Rank	<u>2007</u>	<u>1996</u>	<u>2001</u>
1	United States	1	1
2	Caribbean	10	4
3	Turkey	--	--
4	Australia	2	2
5	Canada	3	3
6	Thailand	8	8
7	New Zealand	5	6

Source: Quantitative Survey Q6¹

¹ Base=Past/Future Travellers (n=2,548)

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

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



7.2 Priority Analysis – by Segment

While Canada ranks 5th overall, it is higher among certain sectors—namely repeat travellers (1st), and those with friends and relatives in Canada (2nd).

The focus groups shed light on the appeal of Canada as German's natural playground and the appeal of multiple visiting. Clearly, repeat visiting needs to be encouraged.

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

	Canada's Priority Ranking
	#
<u>Total</u>	5 th
<u>Gender</u>	
Male	5 th
Female	5 th
<u>Age</u>	
18 – 29	4 th
30 – 39	4 th
40 – 49	4 th
50 – 59	4 th
60+	6 th
<u>Travelled to Canada in Past 3 Years</u>	1 st
<u>Friends and Relatives in Canada</u>	
Yes	2 nd
No	6 th

Source: Quantitative Survey Q.6b

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

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



7.3 Ideal Trip to Canada

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

Season:	Likely July to September
Duration in Canada:	2 ½ weeks
Type of trip:	FIT
Many also visit:	The U.S. (50%)
Intercity:	Car rental highly popular
Accommodation:	Canadian resorts (lakeside or sea), B&B, authentic lodge or ranch, more mid-priced than luxury.
Activities:	Seeing Canada's natural scenery and wildlife, smaller towns, getting to know local inhabitants, trekking, aboriginal experiences all popular.



7.3 Ideal Trip to Canada

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

	Percent Among Prospective Market*
	(841) %
<u>Ideal Next Trip</u>	
<u>Season</u>	
January – March	4
April – June	(25)
July – September	(60)
October – December	11
<u>Duration</u>	
# of nights (avg.)	18.3
<u>Provinces Likely to Visit</u>	
Ontario	62
B.C.	62
Quebec	51
Alberta	30
Yukon	24
Newfoundland and Labrador	22
Northwest Territories	19
Nova Scotia	12
Saskatchewan	11
Manitoba	11
Nunavut	11
PEI	10
New Brunswick	8
<u>Would also visit overnight or longer</u>	
USA	50
Other countries	17
Canada only	42
<u>Type of tour</u>	
<u>Group tour</u>	<u>20</u>
Prefer: All days organized	11
Many free days	8
<u>FIT (non-group)</u>	(81)
Prefer: Package	32
Non-package	48



7.3 Ideal Trip to Canada

	Percent Among Prospective Market*
	(841) %
<u>Transportation Between Centres</u>	
Rental car	79
Air	64
Rail	55
Motor coach	41
Motor home/camper	38
Private car	20
<u>Accommodation</u>	
Lakeside resort	33
City hotel	32
On a ranch	25
Seaside resort	24
Bed and breakfast	24
Authentic wilderness cabin or lodge	20
Mountain resort	15
Caravan/motor home	13
Home of friend or relative	10
Canadian spa	7
Ski resort	3
Coastal cruise ship	3
Camping	3
On a farm	2



7.3 Ideal Trip to Canada

Activities	Percent Among Prospective Market* (841) %
Viewing rivers or waterfalls	92
Taking nature tours	92
Taking city tours	89
Visiting wilderness areas	87
Getting to know the local inhabitants	87
Visiting places of historical interest	86
Observing wildlife in their natural environment	86
Visiting small towns	85
Viewing mountains	85
Trekking in a nature area	83
Experiencing French Canadian culture and cuisine	81
Seeing beautiful beaches and coastlines	80
Aboriginal cultural experiences, celebrations, and attractions	74
Seeing old architecture	71
Taking a garden or flower tour	71
Visiting world heritage sites	69
Whale watching	67
Visiting museums or art galleries	64
Viewing Aurora Borealis (Northern Lights)	60
Attending festivals or fairs	61
Viewing autumn leaves	58
Seeing modern architecture	57
Taking a rail tour	53
Study English	53
Attending theatres, clubs or shows	50
Canoeing/kayaking/boating	44
Dog sledding	43



7.3 Ideal Trip to Canada

Activities	Percent Among Prospective Market* (841) %
Attending rodeos	41
Trail riding on horseback	39
Taking a wine/culinary tour	37
Cycling	37
Snowmobiling	37
Visiting a spa	33
Visiting friends or relatives	30
Taking a cruise	22
Sports fishing	17
Visiting casinos	16
Downhill skiing or snowboarding	14
Heli/cat skiing	14
Golfing	12
Hunting	10

Source: Quantitative Survey Q.25

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

*Very interested in visiting Canada in next 2 years.



Section 8: The Buy Cycle Model



8.1 The Buy Cycle Model – Germany

a) How it Works

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

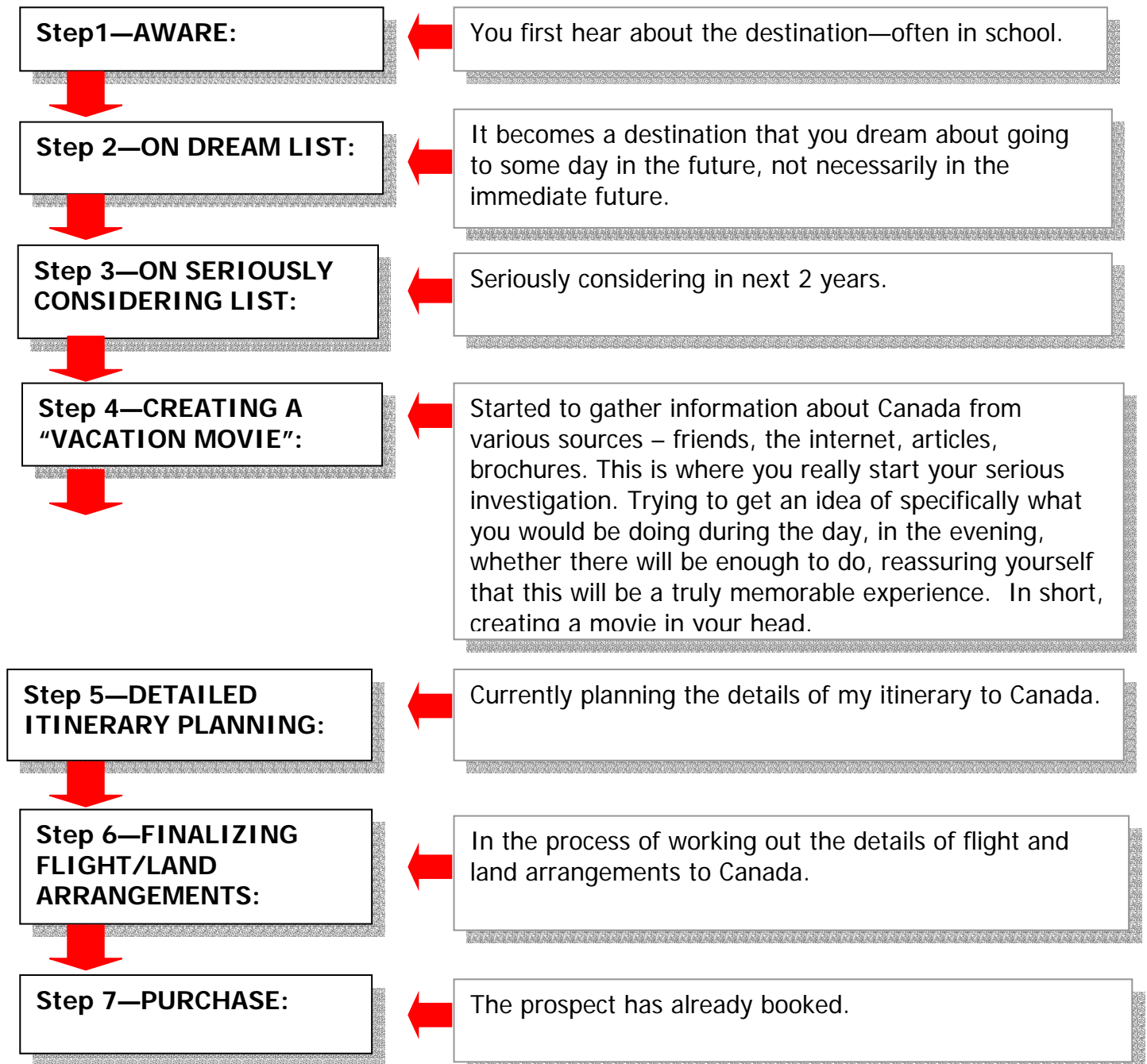


8.1 The Buy Cycle Model – Germany

a) How it Works

- The model is described below:

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



8.1 The Buy Cycle Model – Germany

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. Additionally, Germans enjoy talking about travel; it is a popular topic to discuss with friends.

Step 2 – Getting on the Dream List

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



8.1 The Buy Cycle Model – Germany

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 or equally the thing to do.

Step 4 – Creating a Detailed "Movie"

- Creating the "movie" involves a number of reference sources. Key ones here are:
 - Friends who have been there
 - The internet (a multitude of site checks)
 - Brochures from travel agents
 - Friends and relatives at the destination
 - Magazine articles
 - Television shows



8.1 The Buy Cycle Model – Germany

Step 5 –Detailed Itinerary Planning

- 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.

Step 6 – Finalizing Flight/Land Arrangements

- 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 that arise.



8.1 The Buy Cycle Model – Germany

c) Buy Cycle Influencers - Canada

- The process is fundamentally similar for Canada.

Step 1 – First Aware

- Typically learned about Canada in school. Canada gets discussion when talking about travel, but it was noted that there is a lack of press about Canada that could fuel greater discussion.

Step 2 – Getting on the Dream List

- 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.



8.1 The Buy Cycle Model – Germany

Step 3 – Getting on the Serious Consider List

- 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+).
 - They have visited other priority destinations (particularly America) and it is now time for Canada.

Step 4 – Creating a Detailed “Movie”

- ***“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”***

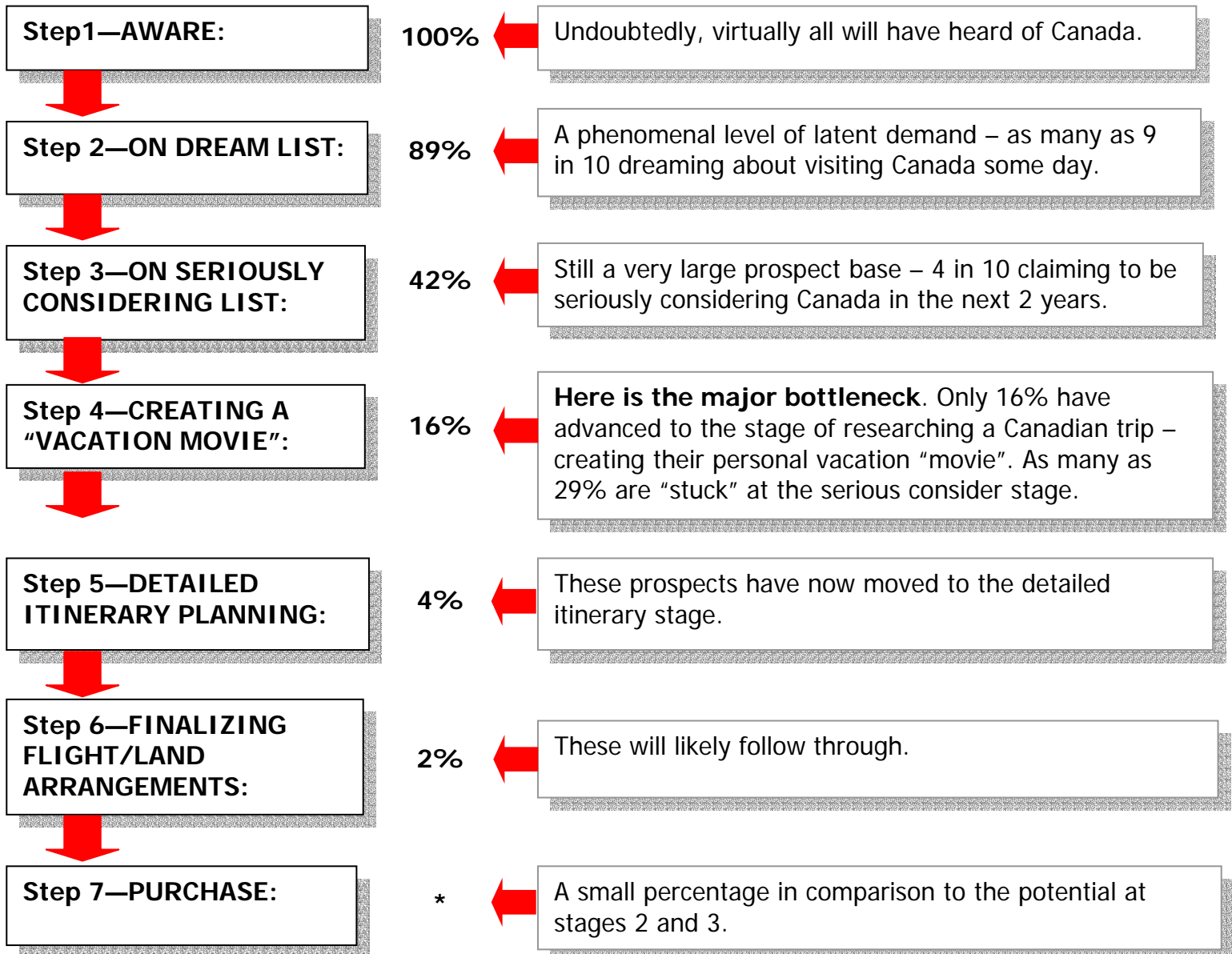


8.1 The Buy Cycle Model – Germany

d) Bottlenecks and Barriers – Canada

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

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

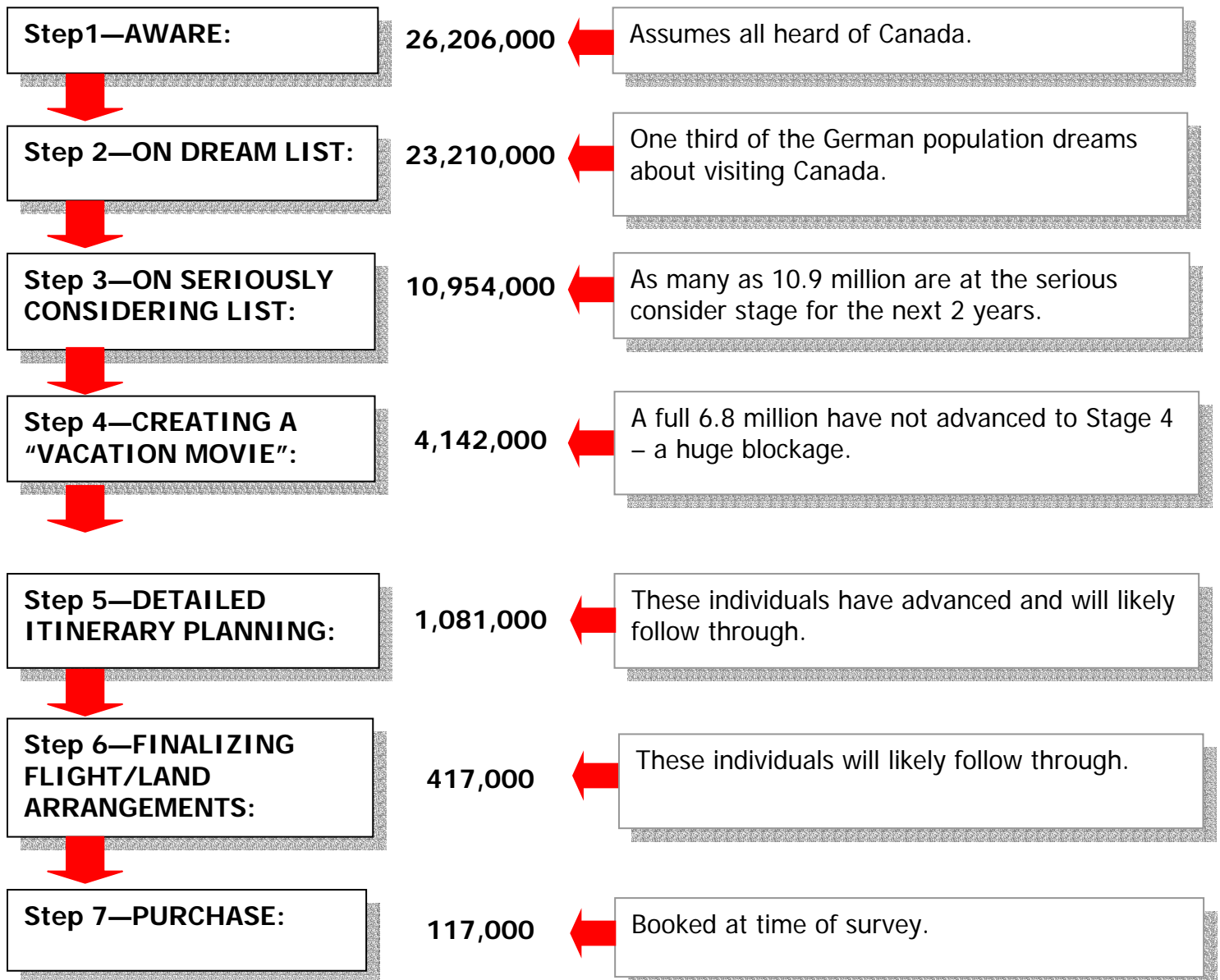


8.1 The Buy Cycle Model – Germany

e) Projected Market Size

- There are 26.2 million potential long-haul travellers in Germany out of a population of 67,892,000 age 18 and over.

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



8.1 The Buy Cycle Model – Germany

Implications

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

Access to Detail

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

Viral Marketing

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

Itinerary Ideas

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



8.1 The Buy Cycle Model – Germany

Fighting Procrastination

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



Section 9: Regional Opportunities



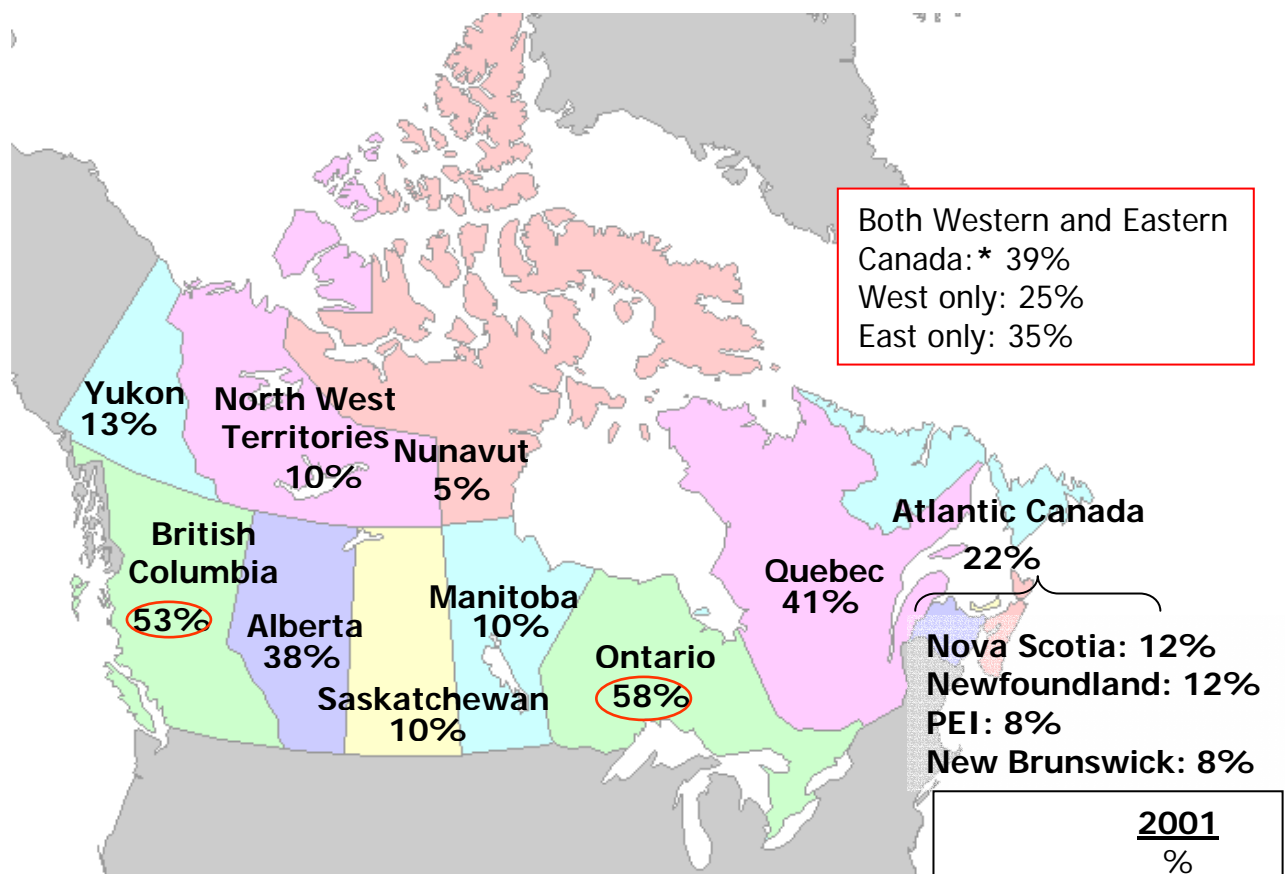
9.1 Places Visited in Canada

Ontario and British Columbia were the most popular provinces to visit by Germans (by 58% and 53%, respectively) on their last trip. Quebec and Alberta also generated solid traffic (41% and 38% respectively).

Cross-Canada travel, though, appealed to only 39% while the majority focused on only one region (east or west).

Of particular note are the Territories where the Yukon drew visits from as many as 13% and NWT—10%. As the qualitative work confirmed, German travellers have a high interest in the natural beauty of the north.

EXHIBIT SECTION 9-1: PLACES VISITED IN CANADA



Source: Quantitative Survey Q.8b1

¹ Base = Past 3 years travellers to Canada (n=692)

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

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

Western Canada includes Manitoba, Saskatchewan, Alberta, British Columbia



9.2 Duration – By Province

British Columbia captured an average of 4.6 nights of the 15.4 spent in Canada, bettering Ontario (3.8 nights) and each of the other districts.

EXHIBIT SECTION 9-2: NUMBER OF NIGHTS SPENT IN EACH PROVINCE

Among Past 3 Years Travellers to Canada

B.C.	4.6
Ontario	3.8
Alberta	2.6
Quebec	2.2
Other	2.3

Total # of nights in Canada 15.4

Source: Quantitative Survey Q.10d¹

¹ Base= n=692

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



9.3 Trip Characteristics

British Columbia

Among Germans visiting British Columbia, half also ventured into Alberta, one-quarter the Yukon and half Eastern Canada.

The trips tend to be quite lengthy (24.9 nights) with just over one week (8.6 nights) within B.C. Consequently, a visit to the province as only part of a more extensive trip to Canada is the norm.

Other trip characteristics:

- Season – Spring and Summer preferred.
- FIT – 93% FIT, as many as 64% no package.
- Accommodation--Hotels/motels most common with a range of price levels, followed by resort hotels.
- Purpose of Trip--Beyond nature, visitors sought out local culture, integrating with local people, as well as visiting historic sites, museums and galleries which provide another view of Canadian life.

Alberta

Visits to Alberta are usually in conjunction with a BC visit (79%), but also Eastern Canada in most cases (61%).

Alberta captures 6.8 nights out of a 27.7 night trip.

Other trip characteristics:

- Season – July to September preferred
- FIT – 90% FIT, as many as 65% no package.
- Accommodation – resorts and mid-price city hotels dominate on the trip. A significant minority (15%) are using a motor home.
- Purpose of trip – very similar to B.C. Being around nature, visitors sought out local culture, integrating with local people, as well as visiting historic sites, museums and galleries which provide another view of Canadian life.



9.3 Trip Characteristics

Ontario

About half of Ontario visitors also venture into Quebec (52%) and/or Western Canada (53%).

The Ontario visit is only 6.6 nights out of 26.7 trip nights.

Other trip characteristics:

- Season – Spring and Summer most common.
- FIT – 90% FIT, as many as 61% no package.
- Accommodation – City hotels/motels with a broad range of price levels.
- Purpose of trip – Enjoying nature, but also experiencing the Canadian way of life – talking with locals, experiencing local culture, visiting historic sites, museums and galleries.

Atlantic Canada

Those going to Atlantic Canada appear to be on an extensive cross-Canada trip – 72% visiting Western Canada, 62% Ontario and 63% Quebec.

Atlantic Canada only captures 4.7 nights out of a relatively long 28.3 night journey.

Other trip characteristics:

- Season – April to September.
- FIT – 92% FIT, groups only 9%.
- Accommodation – A range including hotels, B&B's, resort properties and "authentic" Canadian properties (authentic wilderness lodges, farms, guest ranches).
- Purpose of trip – Enjoying nature predictably dominates, but interacting with locals is very important.



9.3 Trip Characteristics

EXHIBIT SECTION 9-3: TRIP CHARACTERISTICS — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip			
	British Columbia (349) %	Alberta (246) %	Ontario (392) %	Atlantic (142) %
<u>Other Canadian Regions Visited</u>				
<u>Western Canada (net)</u>	100	100	53	72
British Columbia	100	79	45	63
Alberta	56	100	31	46
Saskatchewan	14	15	11	24
Manitoba	12	14	11	26
<u>Yukon/NWT/Nunavut</u>	26	27	19	49
<u>Eastern Canada (net)</u>	62	61	100	100
Ontario	49	48	100	62
Quebec	37	39	52	63
Atlantic	26	26	23	100
Nova Scotia	14	16	15	57
Newfoundland/Labrador	17	17	12	54
PEI	11	12	9	37
New Brunswick	8	10	9	35
<u>Duration (Avg)</u>				
<u>Total nights on trip</u>	24.9	27.7	26.7	28.3
<u>Nights in Canada</u>	16.8	19.6	16.6	15.9
<u>Nights in province</u>	8.6	6.8	6.6	4.7
<u>Month of Travel</u>				
January-March	11	10	12	15
April-June	29	27	30	31
July-September	47	52	44	42
October-December	13	11	14	13
<u>FIT vs. Group</u>				
<u>Total FIT</u>	93	90	90	92
FIT – benefit package	29	25	29	35
FIT – no package	64	65	61	58
<u>Total Group</u>	7	10	10	9



9.3 Trip Characteristics

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(349) %	(246) %	(392) %	(142) %
<u>Type of Accommodation</u>				
Resort hotel	26	32	24	26
Mid-priced city hotel/motel	30	32	33	28
Luxury city hotel	23	23	20	25
Budget city hotel	23	21	25	24
Home of friend or relative	22	22	24	11
Bed and breakfast	20	18	18	24
Cottage/cabin	10	10	8	14
Authentic wilderness lodge	13	14	9	12
Guest ranch	7	6	4	9
On a cruise ship	3	2	2	5
Camping	8	10	6	4
Caravan/motor home	11	15	7	8
On a farm	4	4	4	10
Other	3	4	3	1
<u>Trip Expenditure</u>				
Under €2,000	10	9	13	7
€2,000-<€4,000	24	19	32	25
€4,000-<€6,000	27	28	24	26
€6,000-<€8,000	14	16	14	16
€8,000+	24	27	18	27
Mean (€ Euro)	6,600	7,200	5,700	7,100
<u>Value for Money</u>				
Excellent value	18	17	17	22
Very good value	37	42	38	33
Good value	39	37	41	40
Fair value	6	4	4	5
Poor value	1	*	1	1
<u>Recommended to Others</u>				
Definitely will	66	73	66	60
Very likely	26	21	24	28
Somewhat likely	8	5	9	11
Not likely	1	1	1	2



9.3 Trip Characteristics

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(349) %	(246) %	(392) %	(142) %
<u>Purpose of Trip – All</u>				
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	82	85	76	79
To experience local culture	45	40	48	43
To visit historic sites, museums, or galleries	39	34	43	42
To interact with the local people	45	46	42	52
To see new places	40	40	49	41
To relax, unwind and decompress	28	28	25	22
To go shopping	27	23	30	29
To realize a long term dream	30	34	29	33
To visit protected areas, including nature reserve, regional or national parks	55	58	49	57
To visit friends and relatives	32	33	34	23
To experience big cities in another county	30	28	36	31
Low rates, good deals, and discounts	9	9	10	11
To see and watch wildlife	44	46	33	42
For entertainment and nightlife	13	9	14	17
To view aboriginal sites and events	19	19	13	19
To participate in outdoor activities	24	27	17	27
To be together as a family	13	10	13	14
To attend festivals and/or events	11	13	9	12
A trip that combined business with pleasure	14	13	11	16
To visit a spa, health centre, or hot springs	7	9	5	9
Honeymoon	4	4	5	10
To go downhill skiing or snowboarding	5	6	3	7
Other reason	3	3	5	6

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

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

*Less than 0.5%



9.4 Activities Participated In

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

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

- Seeing the region's unique natural beauty.
- Visiting places of historical interest.
- Spending time in smaller towns where they can experience authentic life.

The VFR factor cannot be ignored. Between 40% and 50% visited with friends or relatives and those, of course, provide a conduit to get closer to the Canadian life style.

Each region of Canada, of course, has its own unique appeals. Hence, the interest among Germans to come back to Canada on a regular basis, confirmed in the focus group sessions.



9.4 Activities Participated In

EXHIBIT SECTION 9-4: ACTIVITIES PARTICIPATED IN – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(349) %	(246) %	(392) %	(142) %
Activities Participated In				
Taking city tours	84	89	86	76
Visiting places of historical interest	73	75	71	70
Visiting small towns	77	82	75	74
Taking nature tours	85	92	79	78
Getting to know the local inhabitants	69	70	65	71
Seeing beautiful beaches and coastlines	63	60	50	69
Sunbathing or other beach activities	31	32	29	38
Seeing old architecture	50	51	46	57
Viewing rivers or waterfalls	79	84	82	70
Observing wildlife in their natural environment	70	78	64	72
Fine dining	47	46	50	53
Visiting museums or art galleries	49	48	50	51
Trekking in a nature area	73	76	66	69
Viewing mountains	78	86	60	68
Attending theatres, clubs or shows	41	41	44	46
Visiting wilderness areas	71	81	61	71
Seeing modern architecture	39	38	45	41
Visiting world heritage sites	32	33	30	47
Visiting friends or relatives	47	47	45	39
Aboriginal cultural experiences, celebrations, and attractions	33	31	28	34
Taking a garden or flower tour	55	55	47	60
Attending festivals or fairs	34	35	34	47
Staying at a luxury resort	26	25	18	31
Taking a rail tour	29	27	29	30
Studying English	34	37	36	44
Visiting hot springs	40	43	27	44



9.4 Activities Participated In

	<u>Visited on Recent Canadian Trip</u>			
	<u>British Columbia</u>	<u>Alberta</u>	<u>Ontario</u>	<u>Atlantic</u>
	<u>(349)</u> %	<u>(246)</u> %	<u>(392)</u> %	<u>(142)</u> %
<u>Activities Participated In</u>				
Canoeing/kayaking/boating	35	36	33	40
Visiting a spa	21	19	13	29
Taking wine/culinary tour	20	21	16	36
Cycling	21	21	20	26
Visiting casinos	19	18	17	31
Viewing autumn leaves	35	39	35	45
Whale watching	45	45	29	49
Trail riding on horseback	26	26	21	38
Camping in a natural setting	22	24	19	30
Viewing glaciers	54	64	29	51
Attending professional sporting events	16	18	13	20
Taking a cruise	12	10	6	19
Golfing	15	13	10	28
Sport fishing	16	17	10	27
Attending rodeos	18	24	14	28
Viewing Aurora Borealis (Northern Lights)	18	21	15	31
Heli/cat skiing	13	13	9	29
Hunting	10	11	8	17
Downhill skiing or snowboarding	14	17	10	26
Dog sledding	14	15	10	29

Source: Quantitative Survey Q.19a¹

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



9.5 Travel Party

For each region, group travel represents 10% or less of all parties.

Typical travel parties include:

- Spouses/significant others (51% to 59%)
- Adults only (81% to 84%)
- More than one person (80% to 83%)



9.5 Travel Party

EXHIBIT SECTION 9-5: TRAVEL PARTY – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CANADIAN TRIPS

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(349) %	(246) %	(392) %	(142) %
<u>FIT vs. Group</u>				
Immediate party only	93	90	90	92
Part of larger group	7	10	10	9
<u>Party Composition</u>				
Spouse/significant other	58	57	51	59
Friends	12	10	15	15
Travelled alone	18	17	20	17
Children	18	19	16	19
Parents	7	7	9	5
Organized group/club	2	3	3	2
Other relatives	4	4	3	2
Business associates/colleagues	4	7	2	4

Source: Quantitative survey Q.12, 16¹

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

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



9.6 Trip Planning

British Columbia

- Friends and relatives are prime sources of inspiration to travel to Canada and to include British Columbia. However, the general media is also critically important – television travel shows, films, stories read.
- The internet, used more for planning purposes, is a source of inspiration for only 25%.
- The lead time is similar to Ontario but shorter than for Alberta and Atlantic Canada.
 - 41.8 weeks planning in advance
 - 15.0 weeks booking in advance
- Most book through an agent, but direct to airline is at 31% and hotel at 17% -- significant levels.

Alberta

- As with B.C., friends and relatives are prime sources of inspiration to travel to Canada and to include British Columbia. However, the general media is also very important – television travel shows, films, stories used.
- The internet, used more for planning, is a source of inspiration again for only 26%.
- The planning time is longer (51.2 weeks planning) and more are booking through agents (68%).

Ontario

- The sources of inspiration are similar to those of Western Canada visitors – friends, relatives and general media story driven.
- Internet as an influencer is at 27%. The average planning lead time is relatively short – 37.8 weeks.
- Just over half (61%) of trips are booked through agents – the rest direct.



9.6 Trip Planning

Atlantic Canada

- Visitors seem relatively inspired by published stories and television shows, suggesting that Atlantic Canada has seen some inspirational publicity in Germany recently.
- Many are booking direct – airlines at 38%, hotels at 24%. Agents are involved only half the time in booking (50%).



9.6 Trip Planning

EXHIBIT SECTION 9-6: TRIP PLANNING – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CAR TRIP

	Visited on Recent Canadian Trip			
	British Columbia (349) %	Alberta (246) %	Ontario (392) %	Atlanta (142) %
All Source of Inspiration for Trip Planning				
Friend or relative	42	42	40	33
Television travel shows	28	25	21	30
The internet	25	26	27	26
Destination travel guide	26	26	23	28
Saw a film on destination	17	17	13	17
Travel agent/tour operator	7	8	6	4
Story in magazine or newspaper	16	16	14	21
Other television show	7	7	9	10
Business reasons	7	8	4	4
Consumer travel trade show	2	3	2	3
Direct mail or email advertising	4	3	3	9
A news story	5	5	4	11
Celebrity travelled there	4	4	2	8
Planning Horizons				
Average # of weeks	41.8	51.2	37.8	47.8
Booking Horizons				
Average # of weeks	15.0	16.5	16.0	14.3
How Trip Was Booked				
Booked through a travel agent/package provider (net)	60	68	61	50
In person	42	47	38	29
Online	14	17	18	17
Via phone	6	6	7	6
Airline (net)	31	27	31	38
Via their website	24	19	25	26
Via phone, email or in person	8	8	6	13
Hotel (net)	17	14	17	24
Via their website	13	12	13	18
Via phone	5	4	4	6
Other online travel supplier	4	4	6	5
Other	5	4	5	5
Total Online	55	53	63	66

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

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

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

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

Q.15c How did you book that trip?



9.7 Traveller Profile

- The profiles of visitors to each region are very similar:
 - Relatively young – typically under 50 years of age, half under 40
 - Slight skew to males
 - Hamburg area, North Rhine important origin markets
 - One-third with close connections in Canada
 - Usually married/living together
 - Employed and well educated
 - Incomes over 2,300 Euros per month or more



9.7 Traveller Profile

EXHIBIT SECTION 9-7: PROFILE OF THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIPS

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(349)	(246)	(392)	(142)
	%	%	%	%
Age				
18-29	23	18	26	30
30-39	26	30	25	28
40-49	23	20	24	21
50-59	10	15	11	7
60+	18	17	14	14
Gender				
Male	55	57	53	54
Female	45	43	48	46
City				
Schleswig-Holstein/Hamburg/Lower Saxony/Bremen	25	23	24	25
North Rhine	24	25	21	22
Hess/Rhineland/Saarland	14	13	14	14
Baden-Wuerttemberg	12	9	14	10
Bavaria	15	17	15	19
Berlin	5	6	4	7
Mecklenburg-Western Pomerania	1	1	2	1
Thuringia/Saxony	3	4	4	2
Close Friends/Relatives in Canada				
Yes	37	35	37	33
No	62	65	62	66
Marital Status				
Married/living together/de-facto	66	68	65	72
Single	23	21	28	25
Divorced/widowed/separated	10	11	6	3
Household Composition				
Adults only	68	64	69	53
With children <18	32	36	31	47



9.7 Traveller Profile

	Visited on Recent Canadian Trip			
	British Columbia	Alberta	Ontario	Atlantic
	(349) %	(246) %	(392) %	(142) %
<u>Occupation</u>				
Total employed	<u>70</u>	<u>73</u>	<u>69</u>	<u>81</u>
Senior unskilled manual worker	4	3	4	5
Skilled manual worker	9	8	9	14
Supervisory or clerical/junior managerial/professional/administrative	15	19	19	14
Intermediate managerial / professional /administrative	13	11	12	10
Higher managerial / professional/ administrative	10	11	8	16
Self employed	14	16	12	17
Employed part time	5	6	4	5
Student	11	6	13	8
Housewife/husband	3	3	4	3
Retired/semi –retired	13	13	8	3
Other	3	4	5	4
<u>Education</u>				
Less than secondary/vocational school	14	12	17	15
Vocational continuing education	19	20	19	19
University	37	36	39	41
Graduate School	30	31	25	24
<u>Household Income (monthly net €)</u>				
Under €1,800	9	7	13	6
€1,800 - <€2,300	11	8	11	13
€2,300 - <€2,800	10	9	11	9
€2,800 - <€3,800	20	24	21	27
€3,800+	29	30	25	35

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

CAD Equivalent (Bank of Canada exchange rate, November 21, 2007)

<€1,800 = <\$2,641 CAD

€1,800 - <€2,300 = \$2,641 - \$3,374 CAD

€2,300 - <€2,800 = \$3,374 - \$4,108 CAD

€2,800 - <€3,800 = \$4,108 - \$5,575 CAD

€3,800+ = \$5,575+ CAD



Section 10: Claimed Barriers to Canada Travel



10.1 Major Barriers to Canada Travel

Concern about cost predictably surfaces as the top reason for procrastinating on a trip to Canada.

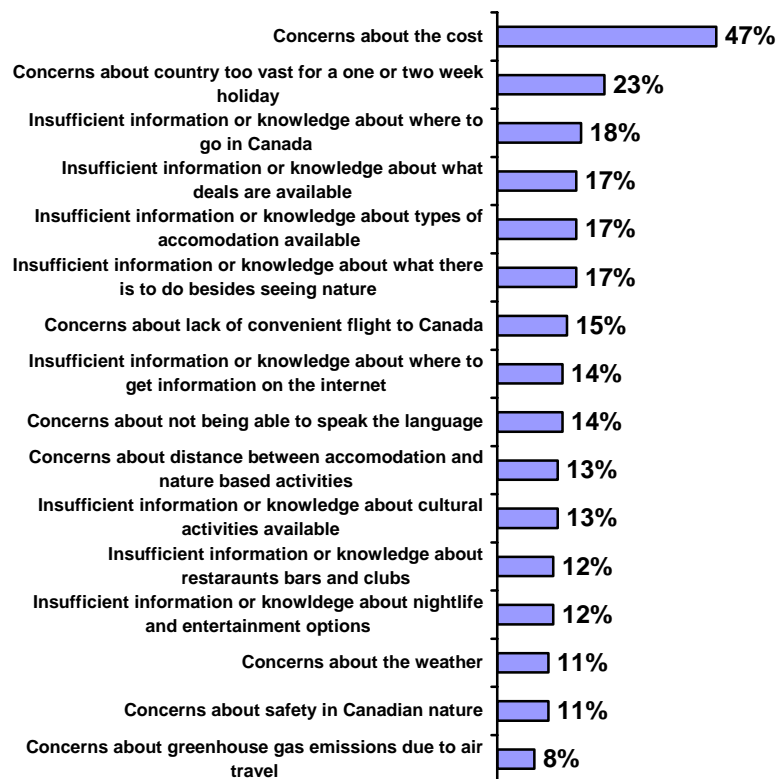
However, of significance is the second top factor—difficulty in getting their heads around a one or two week vacation concept when the country is so vast. This came up in the focus groups and points to the importance of assisting the traveller in their planning to put together viable itinerary ideas.

Many of the other chief concerns are also about the need for information.

EXHIBIT SECTION 10-1: MAJOR BARRIERS TO CANADA TRAVEL

Among Those Not Likely to Visit Canada in Next 12 Months

Extremely/Very Important Barriers*



Source: Quantitative Survey Q. 26¹

¹ Base=n=1,723

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



Section 11: Media

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



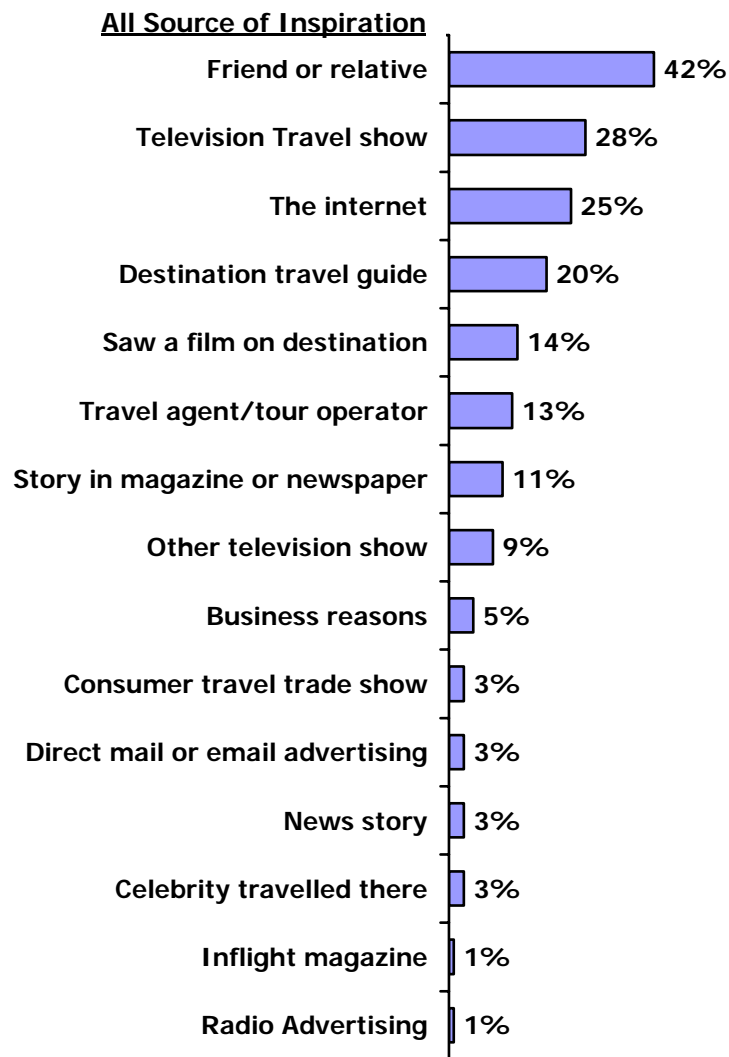
11.1 Source of Inspiration

Friends and relatives are the principle source of inspiration for choosing a destination. This came up in the focus groups as well and reminds travel marketers of the value of viral marketing—encouraging individuals to influence their friends.

Television travel shows and the internet round out the top three.

EXHIBIT SECTION 1 1-1: ALL SOURCE OF INSPIRATION – BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.14a¹

¹ Base=n=1,916

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



11.2 Source of Inspiration – by Destination

For trips to Canada, beyond friends and relatives, television shows, news stories, and films all helped to inspire recent travel.

The fact that the internet only inspired 23% to choose Canada suggests that it still functions more as a planning tool rather than a source of inspiration or lure.

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

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
<u>Source of Inspiration - All</u>				
Friend or relative	38	41	44	41
Television travel shows	37	24	25	22
The internet	25	33	25	23
Destination travel guide	22	15	21	20
Saw a film on destination	22	11	12	14
Travel agent/tour operator	10	23	7	6
Story in magazine or newspaper	15	7	9	13
Other television show	13	5	9	9
Business reasons	8	4	8	8
Consumer travel trade show	4	4	3	2
Direct mail or email advertising	3	7	1	2
News story	5	3	3	4
Celebrity travelled there	4	2	3	3
In-flight magazine	2	1	2	1
Radio advertising	1	1	1	1

Source: Quantitative Survey Q.14a

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

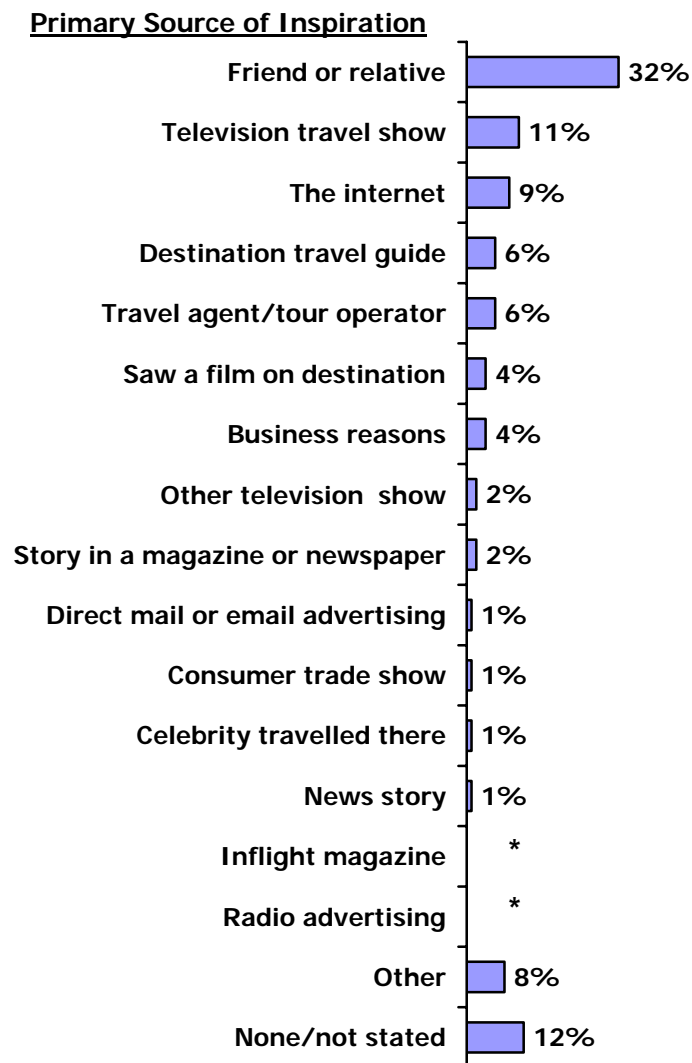


11.3 Primary Source of Inspiration

Friends and relatives are by far the dominant influencer for long-haul travel. With so many choices available to travellers and the importance of sound advice, it is not a surprising finding.

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

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.14b¹

¹ Base=n=1,916

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

*less than 0.5%



11.4 Primary Source of Inspiration – by Destination

Friends and television shows have been very inspiring for recent Canadian travellers. Again, the internet was the primary source of inspiration for only a fraction of travellers—10% to Canada.

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

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
<u>Primary Source of Inspiration</u>				
Friend or relative	25	30	32	32
Television travel shows	17	6	7	10
The internet	8	16	8	10
Destination travel guide	10	5	7	6
Travel agent/tour operator	3	10	3	2
Saw a film on destination	5	3	3	6
Business reasons	5	2	5	6
Other television show	2	1	3	3
Story in magazine or newspaper	2	1	2	3
Direct mail or email advertising	1	4	*	1
Consumer travel trade show	2	2	1	1
Celebrity travelled there	1	1	1	*
News story	1	1	*	1
Other	9	9	10	5
None/not stated	9	11	17	15

Source: Quantitative Survey Q.14b

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

*Less than 0.5%



11.5 Specific Sources Used for Trip Decision

Vox Tours is the most influential television programme in Germany. Generically, documentaries are highly influential.

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

Percent Among Travellers Using Each Medium

<u>Television Travel Shows (n=525)</u>		<u>Other Television Shows Used (n=174)</u>	
<u>Major Mentions</u>	<u>%</u>	<u>Major Mentions</u>	<u>%</u>
Vox Tours	23	Travel programs/shows (non-specific)	21
Travel programs/shows (non-specific)	22	Various shows	14
Documentaries	10	Documentaries	9
Vox	7	Vox Tours	8
Wolkenlos	5	Movies	7
Various shows	4	Wolkenlos	4
Sonneklar TV	3	Other TV Channels	4
Ard advisor	3	Sonneklar TV	4
Movies	2	Other TV shows/dramas	3
Travel channel (non-specific)	2	American series	3
		Vox	3
		Ard advisor	3

Source: Quantitative Survey Q.14 c, d

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

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



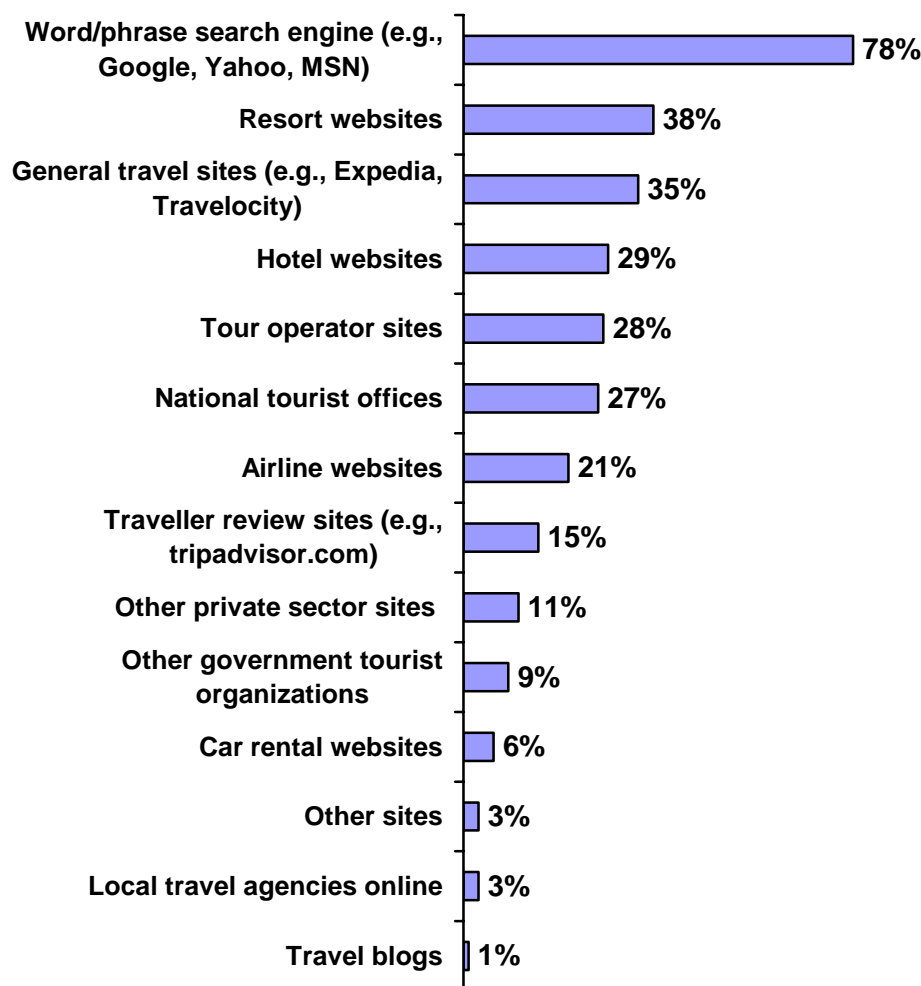
11.6 Specific Websites Used for Trip Decision

Popular word search sites are the main gateways to travel information (to 78%).

Resort websites and general travel sites follow (at 38% and 35% respectively). National tourist office sites rank 6th.

EXHIBIT SECTION 1 1-6: SPECIFIC WEBSITES USED

Percent Among Travellers Using Internet



Source: Quantitative Survey Q.14e¹

¹ Base=n=477

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



Section 12: Trip Planning



12.1 Trip Planning/Booking Leadtime

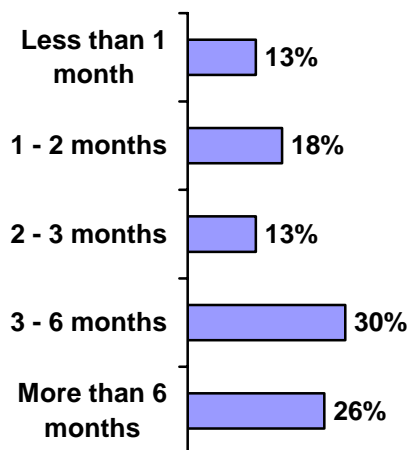
Germans plan their trips 8 months in advance which is a considerably longer lead time than in 2001 (5.3 months) and 1996 (5.5 months).

Booking lead time is 3.5 months, identical to 2001, but somewhat longer than in 1996 (2.7).

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

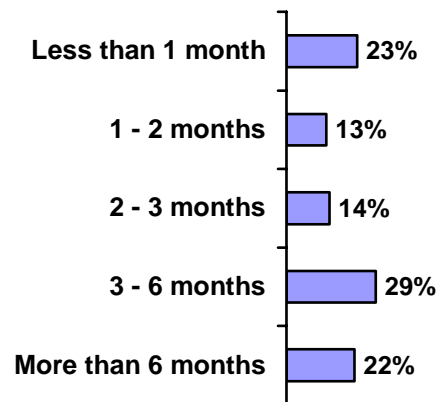
Percent Among Past 3 Years Travellers

Planning Leadtime



Average # of weeks 32.3

Booking Leadtime



Average # of weeks 14.3

Source: Quantitative Survey: Q. 15a,b¹

¹ Base=n=1,916

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

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



12.2 Trip Planning/Booking Leadtime – by Destination

Planning and booking lead times are quite typical for Canada. However, things have changed over the past few years—planning lead time longer (8 months vs. 5.5 in 2001 and 6.4 in 1996). Booking lead time is more similar (3.5 months in advance vs. 3.2 in 2001 and 2.7 in 1996).

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

	Percent Among Travellers Visiting Each			
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %
<u>Planning Leadtime</u>				
Less than 1 month	14	16	12	11
1 – 2 months	13	26	12	17
2 – 3 months	15	17	14	13
3 – 6 months	29	29	33	31
More than 6 months	29	13	29	28
<u>Average # of Weeks</u>	35.9	20.6	36.6	35.7
<u>Booking leadtime</u>				
Less than 1 month	24	29	21	18
1 – 2 months	11	16	12	12
2 – 3 months	15	12	14	16
3 – 6 months	26	26	30	32
More than 6 months	24	17	22	23
<u>Average # of Weeks</u>	14.4	11.6	14.3	15.4

Source: Quantitative Survey Q.15a,b

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

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



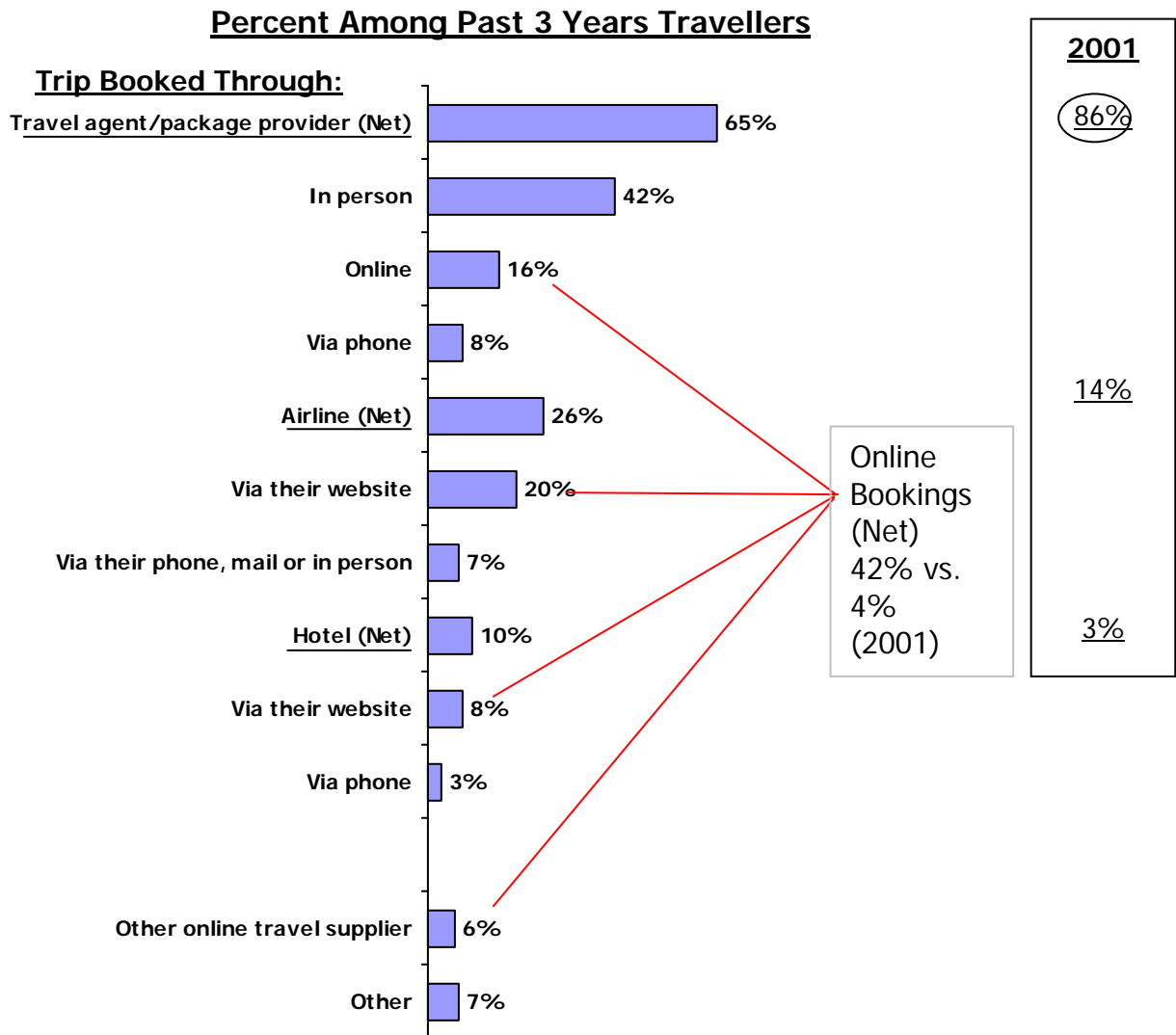
12.3 How Trip Was Booked

The focus groups noted that, while Germans may use the internet for trip planning, most still prefer the security of booking through an agent. This is confirmed here—65% booking long-haul trips through agents.

However, note that as many as 42% of sales are made online—16% online with an agent, the remainder direct--mainly with hotel facilities and airlines.

These are dramatic changes from 2001 when as many as 86% booked through an agent and total online was only 4%.

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



Source: Quantitative Survey Q.15c¹

¹ Base=n=1,916
Q.15c How did you book that trip?



12.4 How Trip Was Booked – by Destination

With travel to Canada, the majority (59%) still booked through an agent, 32% via an airline and 15% direct to an hotel. This is a similar pattern to the US.

However, dramatic change for Canada here-- 6 years ago as many as 89% booked through an agent and online was only 5%.

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

	Percent Among Travellers Visiting Each				Canada 2001 %
	Asia (412) %	Turkey (354) %	U.S. (567) %	Canada (692) %	
<u>Trip Booked Through:</u>					
<u>Travel agent/package provider (net)</u>	<u>65</u>	<u>77</u>	<u>56</u>	<u>59</u>	<u>89</u>
In person	46	47	38	40	
Online	13	21	16	14	
Via phone	9	10	4	6	
<u>Airline (net)</u>	<u>31</u>	<u>14</u>	<u>34</u>	<u>32</u>	<u>16</u>
Via their website	22	8	28	26	
Via phone, email or in person	10	6	8	7	
<u>Hotel (net)</u>	<u>13</u>	<u>6</u>	<u>14</u>	<u>15</u>	<u>4</u>
Via their website	10	4	11	12	
Via phone	4	2	4	4	
Other online travel supplier	5	5	8	6	
Other	3	6	7	6	
<u>Online Bookings (net)</u>	<u>40</u>	<u>35</u>	<u>51</u>	<u>47</u>	<u>5</u>

Source: Quantitative Survey Q.15c

Q.15c How did you book that trip?



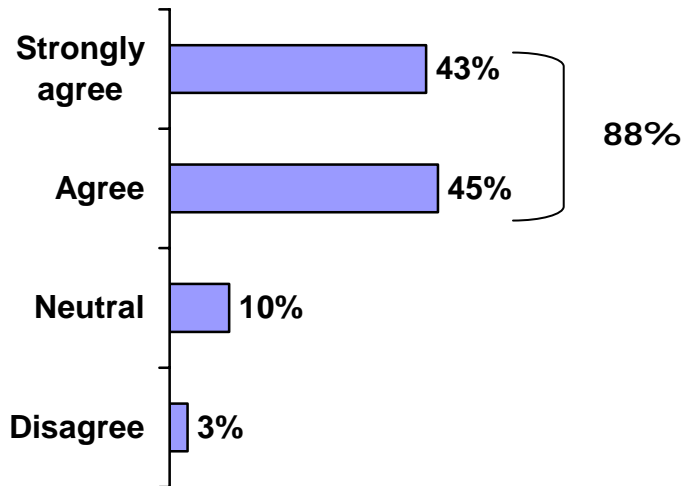
Section 13: Environmentally Responsible Destination



13.1 Long-Haul Traveller's Environmental Involvement

The vast majority of Germans claim to try to reduce the impact they have on the environment on a daily basis (88%).

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



Source: Quantitative survey Q.27a¹

¹ Base=Past/future travellers n=2,548

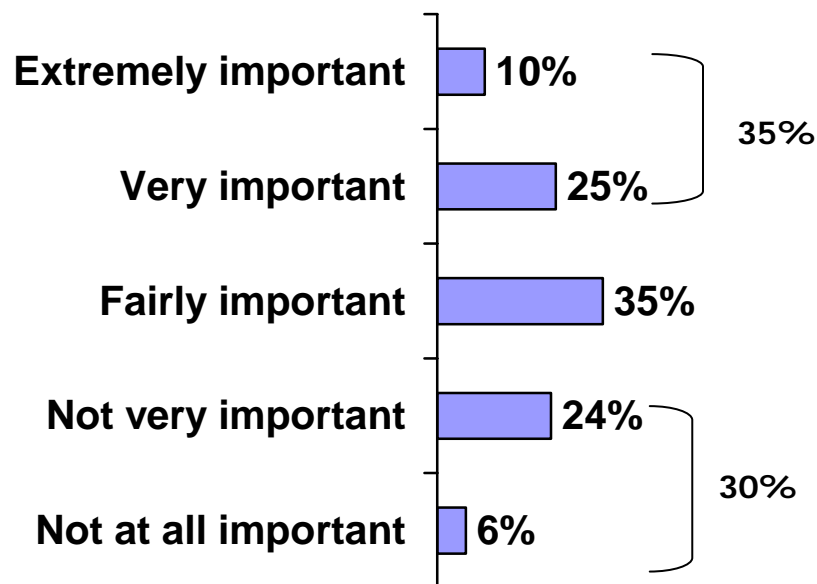
Q.27a To what extent do you agree or disagree with the following statement?
It is very important to me that I take action on a daily basis to reduce my impact on the environment by adopting environmentally-friendly measures such as recycling, conserving water.



13.2 Importance of Destination's Record on Environment

However, while most make a personal effort to reduce their impact, only 35% claim that their concern is enough to influence their choice of destination based on its environmental record.

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



Source: Quantitative survey Q.27b¹

¹ Base=Past/future traveller n=2,548

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

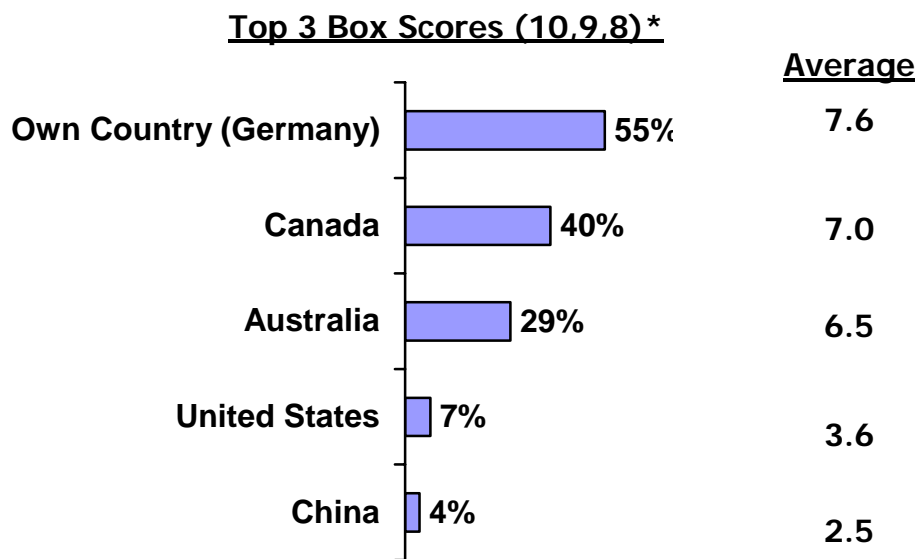


13.3 Destination Rating on Being Environmentally Responsible

Germans believe that their own nation has a very good record in terms of environmental responsibility.

Among four offshore destinations evaluated, Canada emerges as having the best reputation, with China and the US trailing badly.

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



Source: Quantitative Survey Q. 27c¹

¹ Base=Past/future travellers n=2,548

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

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



Section 14: Consumer Product Ideas Forum



14.1 Introduction

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

- Hope and expectations of tourists coming over to Canada from Germany
- 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 addressed in a separate section, revealed day by day to the participants. The forum started with an overview of Canada as a destination, providing a holistic picture of travel to Canada from Germany.



14.2 Canada as a destination: General observations

Canada rates highly as a “dream” destination, poorly as a planned destination, and rarely as an extended “city visit” destination.

The United States was listed as an entry/exit point by a number of respondents (especially Seattle, Boston and New York). This probably refers to a) the generally greater knowledge of the US and b) the generally greater number of flights to the US. The introduction of “cheap” fares to Canada, and the increased frequency of flights and increase in Canadian destinations brought around when the new Open Skies agreement is signed should help.

Certain specific destinations are in Canada and are iconic:

- Vancouver,
- Rocky Mountains,
- Niagara Falls / Toronto,
- Ottawa,
- Montreal/Quebec City.

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



14.3 Stereotypes of Canada

The Germans have fewer stereotypes of Canada than the UK or French travelers and they are, on the whole, more fragmented. The main stereotype they have is that of “authenticity”: authentic nature, authentic people/life, authentic aboriginals, etc.

Authentic Nature

For centuries, Germany has controlled its wilderness to the point where forests are frequently referred to as “tree farms” by Canadian and American tourists. Seeing nature in an uncontrolled state is, for Germans, both invigorating and, at the same time, frightening:

“It’s not like we don’t have any nature at home, but you can’t compare it (the nature in Germany) with the one in Canada. I had some expectations how the Canadian nature would be. Before your trip, you usually get yourself some information (internet, travel guide). And when you are finally in Canada, you expect to see this praised nature. But the reality is truly mind blowing! I found the view, the inviolacy and the feeling of endless vastness very touching and impressive.”

“I can imagine seeing the endless vastness, being close to wildlife and to see the wild nature. The streams where I am taking a bath, the trees under which I am sleeping, I can already smell them. A camp fire at night and the claret sky is reason enough to leave right away. Of course, after a few days in the wilderness, I am looking forward to a civilization as a warm shower and a warm bed near Niagara Falls.”

“I expect seeing an unbelievable vastness and a beautiful nature and wildlife. I also believe that my pleasant anticipation of French culture (architecture, cuisine, language) and meeting locals will come true.”

“I don’t know how good the infrastructure in the Canadian wilderness is. If I would hurt myself while hiking or something like that, my only concern would be that it takes longer to get help there.”



14.3 Stereotypes of Canada

For Germans, the positives and negatives of “authentic nature” tend to be almost too wearing on their emotions, and most strongly wish to combine the luxury of “civilization” with the “beauty of nature”. This longing showed clearly in one respondent’s off-hand description of Toronto:

“Toronto is supposed to be the city within the forests and I can’t miss that...”

The vast majority of respondents, while wishing for authentic nature, can only take it in small doses, and heavily mitigated by safety-nets (both infrastructure and city visits).

Authentic People/Life

One of the major attractions for Germans is the authenticity of life. In part, this probably goes back to population densities and high urbanization rates in Germany. Regardless of where it comes from, however, there is a strong desire to make contact with the “locals”, especially in smaller settings (e.g. B & B’s, pubs, Inns, “villages”, etc.).

“I don’t like the cold and because the destination is pretty up north, it could be chilly there. I am also afraid to get bored because the area is very rural; but I would hope to find lots of nice villages and B&Bs.”

“I would like to do a tour across the historic vineyards and the historic sights, although not longer than two weeks. The Heritage Park and the old paddle steamer should be included. I think Bed & Breakfast – inns are the ideal location to enjoy the culinary pleasures of each region.”

“I was lucky to see most of the city with Donovan, a local Torontonian. No hard feelings against travel guides but I prefer to meet the country and the people directly.”

Authenticity also played a major role in the descriptions of food, and this offers several opportunities for product creation/enhancement, especially given two key components of Germany culture

1. Their familiarity with the concept of and respect for local and regional cuisine, and
2. The key role played by eating/drinking establishments in Germany.



14.3 Stereotypes of Canada

Clean, Fresh and Beautiful

As with travelers from the UK and France, Germans who have been to Canada have been very impressed with how clean, fresh and beautiful the country, and the cities, are.

"The city of Vancouver amazed me, the most beautiful and liveable city I know. I also liked Vancouver Island and the hinterland. For me personally, Vancouver is the ideal mix of a cosmopolitan city and natural hinterland."

"I was surprised about the tidiness in Toronto – not comparable to any German bigger city."

This impression also extended to the people of the cities.

"Of course, the city [Quebec] has a European touch because of its historic background. Also it was very tidy there and everybody welcomed us warmly and the people there are very helpful."

"For me personally, Toronto is the cleanest city I have ever seen in my experienced travel life, the variety of the city districts and the multi cultural impressions were unforgettable for me."

What is most important about these observations is that they extend the potential for "authenticity" into urban centres; something which has not, so far, been adequately marketed to German non-visitors.



14.4 Experiences of Canada

The following accounts of visits to Canada are fairly typical and show several interesting patterns.

The purpose of this trip was to get to know Vancouver, a city that started to fascinate me long time ago. I arrived in Vancouver, where I stayed for 2 weeks. Within this time, I made a 2-days-trip to Chilliwack to visit friends there and to see the countryside. From Vancouver I travelled to Denver to visit relatives.

When I arrived in Montreal, my family picked me up and I spent the first 3 days with my family in Montreal. After that, I rented a car and travelled across Canada and stayed into Motels and guesthouses. After app. One week, I arrived at Niagara Falls and took a different route back. I spent the last day with my family and back to Frankfurt from Montreal with Air Canada.

We entered the country from Niagara by car. From there we went to Toronto for three days. On the fourth day, we travelled back to the USA to Detroit and crossed the border near Huron and visited an old friend in Grand Rapids.

I made a private trip with a friend. We arrived in Vancouver, then crossed over to Vancouver Island, from Nanaimo to Port Hardy, from there by boat to Prince Rupert, from Prince Rupert all across British Columbia to Hazelton, Burns Lake, Takysie Lake, to Jasper National Park, mountaineering Mount Robson, along Athabasca River to Hot Springs, then all along the beautiful route from Jasper to Banff, from Banff to Penticton in the almost subtropical Okanagan Valley, from there back to Vancouver. All in all, we were travelling for app. 3 weeks.

For many previous visitors, the presence of friends and/or relatives, in Canada or the US, is a motivator for travel, even if it isn't always listed as VFR travel. The particular travel patterns of these respondents indicate that they usually engaged in some form of a circle route, making certain that they at least tour through "nature".

It is also important to note that these respondents did **not** talk about adventure activities and, also, did not have strongly fixed itineraries.



14.5 General Discussion of Tourism Products

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

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

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

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

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

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

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



14.5 General Discussion of Tourism Products

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.¹

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.

¹ It is somewhat inaccurate to refer to this as “hate” – it is really “fear”.



14.5 General Discussion of Tourism Products

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.



14.6 Barriers and Options

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."

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"¹ and, while some respondents are not "into the Wild West", many are fascinated with the "natives".

¹ This fascination goes back well over 100 years. For example, there were "recreationist" "Indian" events in Bavaria in the 1880's.



14.7 British Columbia

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

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

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

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

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

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

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



14.7 British Columbia

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

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

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

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

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



14.7 British Columbia

A similar, although less exhaustive, itinerary is:

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

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



14.7 British Columbia

One suggested itinerary for first time visitors would be

Arrive Vancouver

Explore city (3-4 days)

Choice of guided vs independent

Included:-

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

Transfer to Vancouver Island (4-5 days)

Options:

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

Transfer back to Vancouver (brief stop)

Up the coast to Chilcotin (3-4 days)

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

Back to Vancouver (2 days) → Frankfurt

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



14.8 Alberta

In general, Alberta was viewed by most respondents as a road trip site and/or a skiing vacation site (Banff). While certain specific attractions were mentioned (e.g. the West Edmonton Mall and the Calgary Stampede), they did not appear to be major draws in the sense that the respondents would travel to Alberta with that as the main purpose.

As with travelers from France and the UK, many respondents conflated the Calgary - Banff - Lake Louise corridor with British Columbia. These two responses are fairly indicative of this attitude:

"There are so my options for Alberta and because I am not very sport interested, I would decide to come in the summer and do a roundtrip here as well because there is so much to see. Best, to take a non-stop flight from Germany to Calgary and from there rent a car. Lake Louise is said to be very beautiful, maybe I would stay there a bit longer. Then towards Vancouver and through the Rocky Mountains and maybe do a train ride. I would fly back from Vancouver."

"Alberta would only be attractive for me in the winter. For skiing in the Canadian Rockies, pretty sure, the snow is amazing, app. 10 days. Also, ice climbing and other sport activities sound interesting. I would stay a few more days in Calgary and then fly back or travelling to another province."

This suggests the possibility of co-branding a Calgary-Vancouver corridor tour product that would take advantage of the drawing potential of both cities and all the sites (Whistler, Banff, Lake Louise, etc.) in between.

The more common response to the Alberta sites involved a road trip form of exploration.

"I would plan three weeks here as well. Non-stop-flight to Calgary (might be a bit more expensive but you save time). Then I would rent a car. I would split the time in half. In Calgary, the Dinosaur Provincial Park and the Calgary Zoo would be on my list. If the time would be right for the Stampede, that would be awesome of course. The rest of my time, I would stay in Edmonton. West Edmonton Mall (The world's biggest shopping and entertaining mall). I am sure, I would spend a lot of time and money there."



14.8 Alberta

"If somehow possible, one of my highlights would be a trip with the Rocky Mountaineer. At home, we visit the zoo a lot, so it might be interesting to see a Canadian Zoo: Calgary Zoo. The Stampede in Calgary would top off this vacation. When do you ever have the chance to see a live rodeo? My itinerary should be the base for my vacation schedule, beside that, I don't want to plan everything strictly, but be flexible to arrange whatever I like. Nothing is more stressful for me as being under pressure on vacation."

This suggests the possibility of developing road trip oriented products that take advantage of existing products as stop points, while enhancing the freedom of visitors to travel.

Such products could include road tour guides, the creation of "caravan routes", and/or the deployment of a web-based road trip planner.

None of the German respondents in our sample had previously been to Alberta. As such, we have been unable to determine exactly how their perceptions shift once they have visited. This means that the following suggestions are aimed at product/marketing focused on new visitors.

First, given the German fascination with Aboriginals, we would suggest that a stronger emphasis be placed on aboriginal tourism products in the German marketing literature. Also, it should be noted, that the German infatuation with Aboriginals is more in keeping with a general fascination with "Cowboys and Indians", at least at the surface level. This would indicate that it would also be important to consider pushing the "Cowboy" image a touch more in the German marketing literature.

Second, for the German market, Alberta lacks an iconic site. We would strongly recommend that efforts to develop such a site be made and, possibly, the easiest one would be the Calgary Stampede. This would allow for the creation of a "Come for the Cowboys and Indians and stay for the ..." campaign.

Third, visiting friends and relatives is a key conversion draw for German travelers to Canada (as it is for the French and British as well). We would suggest that an emphasis be placed in the German marketing literature about the role of German settlers in Alberta. This would a) help to convince potential German tourists that Germans are "welcome", b) show that there is a Germanic "root" in the province, and c) show them that there actually is a German settler heritage.¹

¹ For more on German settlement in Alberta, see http://www.abheritage.ca/pasttopresent/settlement/german_settlement.html and <http://www.ualberta.ca/~german/PAA/German-speakingcommunitiesinAlberta.htm>



14.8 Alberta

Suggested Itineraries for Alberta, outside of generic road trips, are the same as those for the French traveler.

Winter	Summer
Arrive Calgary (2-3 days)	Arrive Calgary (2-3 days)
<ul style="list-style-type: none"> ➤ Amerindian Museum and Olympic sites 	<ul style="list-style-type: none"> ➤ Amerindian Museum ➤ Stampede (or smaller-scale rodeo/horse farm experience)
Transfer to Banff (5-6 days)	Transfer to Drumheller (3-4 days)
<ul style="list-style-type: none"> ➤ Walking tours/snowshoe ➤ Winter sports options ➤ Lake Louise ➤ Hot Springs, funicular ➤ Helicopter tour 	<ul style="list-style-type: none"> ➤ Prehistoric sites field trip ➤ Prehistoric museum
Transfer to Jasper (5-6 days)	Transfer to Red Deer (1-2 days)
<ul style="list-style-type: none"> ➤ Touring as in a) (above) with winter options 	<ul style="list-style-type: none"> ➤ Visit Aspen Beach prov. park
Transfer to Edmonton (2-3 days)	Transfer to Edmonton (3 days)
<ul style="list-style-type: none"> ➤ West Edmonton Mall and return 	<ul style="list-style-type: none"> ➤ Visit West Edmonton Mall ➤ Strathcona
	Transfer to Lac La Biche (3-4 days)
	<ul style="list-style-type: none"> ➤ Walking, cruising ➤ Sports activity options
	Transfer to Jasper (via Edmonton) (overnight) (3-4 days)
	<ul style="list-style-type: none"> ➤ Touring as in a) (above) with summer option
	Return via Edmonton



14.9 Ontario

For the German traveler, Ontario has two iconic destinations - Toronto and Niagara Falls – and two well-recognized but non-iconic destinations – Algonquin Park and Ottawa. One of the most interesting findings is that for all respondents, Ontario was viewed primarily as a non-winter destination. Furthermore, Toronto was seen as a viable destination for an extended city trip.

For German participants, there is a general awareness of Toronto as a clean city but, with the exception of the CN Tower, very little specific knowledge. Niagara Falls is also recognized by German travelers, and is a “must see” site. Knowledge of other areas of the province is almost non-existent, although Ottawa is quite well known, as is Algonquin Park (at least by name).

On the whole, Ontario is not a top of mind destination for the German traveler. Once it has been pointed out, however, it does have some excellent appeal.

*“To be honest, I never thought that much about Ontario. But after I opened its website, I found an appealing tour for me pretty fast, it offered an Ontario round trip: Toronto -- Niagara Falls -- Manitoulin Island -- Killarney Provincial Park -- Muskoka -- Algonquin Provincial Park -- Ottawa -- Kingston -- Toronto. To me, the recommended duration of 11 days seems not enough. Maybe 2-3 weeks would be better. Travel time: summer or fall.
I like this trip because there is “a bit from everything” I like (landscapes, culture, city tour/skyline, shopping).”*

As with many European travelers, the problem with selling Ontario lies in their ignorance rather than in our lack of products. Indeed, as shown by the quote above, the products actually have quite an appeal once people are aware of them. This level of ignorance, especially when coupled with some of the rather outrageous stereotypes held by Germans about Canada, is clearly shown in one respondent’s suggested “itinerary”:

*“CN Tower= skyline Toronto
Helicopter trip Niagara
Indian Summer – beautiful colours, hikes for every condition.
Over night stay in an Indian camp
Learn more about Indian customs, culture and history, buy a drum as a souvenir
Picnic at the lake
Visit picturesque little villages
Museum of civilization
Boat trip 1000 islands
Warehouse sales”*



14.9 Ontario

For travelers who had been to Ontario before, we see the same pattern as appears in British Columbia – a desire for more detail, more time in place and more flexibility. Rather than give detailed itineraries, previous visitors tended to use simple verbal descriptions such as:

“Again, we would plan a two-week-trip. We would fly in from Frankfurt to Toronto. I would like to stay there for a few days and visit the city. After that, for sure to Niagara Falls and check out the area there. Maybe we could schedule it like this that we would be there for the Shaw-Festival and see a few shows there.”

and

“For sure, one highlight would be the visit at the AGO [Art Gallery of Ontario], a view from the CN Tower, Niagara Falls and the drive there through the Indian Summer with its colourful leaves.”

One of the more interesting observations coming from this is how the perceptions have shifted from Canada=Nature to Canada as a sophisticated cultured place **surrounded by** authentic nature after visiting the suggested websites. Even when the perception has shifted, however, we still find that longing for “authentic nature” (with a suitable safety net) showing up.

“A highlight would be to visit Toronto and Canada's biggest park, Algonquin Park. I find it very charming to stay at a cabin for a few days. Of course, Niagara Falls would be highlight. (Everyone should see them at least once in a lifetime, I think).”

A second interesting observation is in what was **not** mentioned, or mentioned only in passing: hiking, canoeing, rafting, animal watching, etc. This lack of mention may have to do with the fact that these activities are not stressed so much as others, or the participants may have assumed them to be universally available in Canada.



14.9 Ontario

A third observation is that most participants appeared to be comfortable with some variety of road trip. For example:

“The trip would last about four weeks. I would fly in from Frankfurt to Toronto. After a few days of getting familiar with everything and sight seeing, we would start the recommended round trip: Toronto -- Kingston-- -Ottawa---Algonquin Provincial Park---Muskoka---Killarney Provincial Park -- -Manitoulin Island. Here, I would leave the scheduled route and drive along Lake Superior to Sault St. Marie to the West shore of Lake Michigan. From there all along the shore to Chicago. We would spend the last days in Chicago.”

This near universal acceptance of the safety of road trips in Ontario or, at least, in Southern and Eastern Ontario, would indicate that certain road trip itineraries would be highly marketable. In addition to the ones already noted and available online, the following suggested itineraries could be considered.

Fly to Toronto (3 days)

- Shopping
- CN Tower
- Shows

Drive to Niagara Falls (2 days)

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

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

- Prince Edward County
- The Sandbanks
- 1000 Islands

Drive to Ottawa (2-4 days)

- Parliament Hill
- Museums

Fly home



14.9 Ontario

Alternatively:

i) Arrive Ottawa (4 days)

- House of Parliament
- Museums (esp. Civilisation)
- Gatineau Park
- Museum of Civilization
- Short tours: canal and confluence of rivers
- Shopping

Transfer to Grand Calumet Island (3 days)

- Options: rafting, canoeing, kayaking, choice of camping/cottages, barbecues

Transfer to Algonquin Park (4 days)

- Options: walking, cycling, canoeing, observation of wild life, choice of camping/cottages, barbecues

(At some point: passing by an Indian village)

Transfer to Parry Sound (4 days)

- Options: longer boat cruise, sailing, kayaking, canoeing, barbecues or Muskoka restaurants

Transfer to Toronto (4-5 days)

- CN Tower
- Quick trip to Niagara Falls and back
- Shopping: Eaton Centre, etc.
- Day on the Island

Options: sailing, swimming,

Return

ii) An alternative would start and end the same way

(Ottawa – 4 days... Toronto – 6 to 7 days)

In between, the tourists would:-

Transfer to Algonquin Park (4 days)

- For a more leisurely stay, involving guided walking tours, some boat trips, lots of animal/bird watching, staying in Inns/B&B's

Transfer to Muskoka (3-4 days)

- Choice of an inn for some lakeside water sports, gastronomy, good scenery, walking tours nearby

Transfer to Toronto (6-7 days)

- With a longer trip to Niagara Falls returning via the wine country, Niagara-on-the-Lake

Return



14.10 The Atlantic Provinces

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.



14.10 The Atlantic Provinces

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.



14.10 The Atlantic Provinces

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

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

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

¹ <http://www.tasteofnovascotia.com/>



14.10 The Atlantic Provinces

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



14.11 The Yukon Territory

Overall, respondents were split in their reactions to the Yukon. This ranged from:

"This trip would be my dream. First of all, I would rent a boat and would go downstream on the river Yukon. Then I would rent a car to return to my starting point. I would bring my tent to stay overnight outdoors. The whole trip has to be three to four weeks so that I would have enough time to enjoy the nature."

though to:

"I wouldn't stay there that long because it seems to be more for sportsmen and nature freaks."

In many ways, this captures the German dilemma in considering Canada in general, and the Yukon in particular, as a vacation destination. They love "authentic nature" as long as they do not have to deal with it too much. As several respondents noted:

"This part of Canada is for sure very beautiful but not adequate for a family vacation. I don't like the cold, tents, RVs or solitude. I want hotels or B&Bs, restaurants and I like having a bit of comfort. I like watching movies about the Yukon, but enjoy sitting in my warm apartment."

"At the beginning, the vastness and solitude would be very impressive, for sure, but can turn out to be too much very soon."

For the past 30 years, the Yukon has had a successful marketing campaign aimed at German tourists. This campaign, and RV variant of a road trip, is still quite popular amongst respondents who had not been to Canada before.

"First, from Frankfurt to Whitehorse. I would stay there for one week only. I would try to rent an RV from Germany and start right away, as soon as I get there. From Whitehouse I would take the Kluane Loop route. Duration: 6 days. I would decide for this trip because I want to see Dawson Creek. During this trip you come along"



14.11 The Yukon Territory

One of the main reasons for this popularity, other than established tradition, is that it plays off on many of the German-held stereotypes about Canada: authentic nature, “Indians”, the “frontier”. Consider the following:

“Flight direct to Whitehorse. Duration: 1 week. From all route suggestions on the website, I liked the Golden Circle Route best because there are many different things to see and I have the impression that I will get a good overview of this area according to my personal interests. Besides, I have the possibility to see lots of ancient culture, the way of life and the art of the Tlingit Indians and the Southern Tutchones. I can decide myself, if I would like to stop to see that or if I just drive by. Kluane National Park sounds great too because you have the opportunity of horse riding trips, wild water rafting and a sightseeing flight to mountains and glaciers. The route of 585 km both ways for a week seems to be manageable. So, this would be my route: Whitehorse-Skagway-Haines, Alaska-Haines Junction, Yukon-Whitehorse. To be independent and to be able to decide what to see, a rented car might be the best option. Regarding accommodations and sights I would follow the recommended ones in the Golden Circle Route.”

As was illustrated in the perception changes of German travelers to British Columbia and Ontario, they may come for the nature, but they come back for the culture. Even getting them to come to a part of Canada they perceive to be “empty” is tricky. When asked about their concerns about going to the Yukon, amidst the usual concern about vehicles breaking down such as:

“Because of the low density of population, I would be afraid that my car would break down and I would need service (if necessary).”

A number of fairly serious fears emerged:

“If I would travel into such a lonesome area, I expect to see wildlife, especially bears. I would be a bit afraid that they may be aggressive.”

“I am afraid that I won't find an adequate travel partner for this. I wouldn't travel all by myself, then I would be scared in fact.”

“This area is much too lonesome for me – I would feel like in a Steven King novel there. For sure, nothing for me. I feel much safer right in the middle of NYC as in the middle of the Yukon.”

“Too many mountains, solitude, wild bears, too much isolation. Not applicable for a family with children.”



14.11 The Yukon Territory

Even when respondents were positive about traveling to the Yukon, some of these fears were evident:

"I always found the Yukon very interesting. Nature, vastness, solitude. With an adequate partner, I would like to travel along the Yukon for three weeks, either renting an RV or just rent a cabin and stay there and enjoy the wilderness."

This is not a fear of nature *per se* but, rather a fear of being lost and alone without being surrounded by people: autophobia approaching monophobia at a cultural level. This fear is so deep-seated within the modern German culture that there is no getting around it. In order to overcome it, the general strategy much be modified to take it into account. In particular, it is crucial that potential German tourists always feel that there is a human, as well as infrastructural, safety net available.

Following along this line of thought, and tied back into earlier discussions of how German tourists come for the nature but return for the culture, there are certain implications when it comes to tourism products and marketing.

First, and most important, is the presentation of the Yukon as a **cultural space**. This means that, in addition to the emphasis on "raw nature", and emphasis should be placed on towns, cultural activities and, most importantly, on how the "aboriginals" integrated into nature (this draws on pre-existing German stereotypes). This means that Whitehorse, especially, should advertise its cultural events.

Second, the **physical/infrastructural** safety net must be visible to German tourists. This can be in the form of integrated road trip planners and cell phones with a German speaking help desk call centre. The key theme to establish is something along the lines of "The Yukon – empty until you need it".

Third, and absolutely crucial to the acquisition and retention of tourists outside of the Nature Participation class, is the development and focused marketing of cultural events that are unique to the Yukon and, yet, recognizable in the European context. One interesting observation that may be developed into a saleable product is that Germans take their classical music very seriously. This could be transferred into a special, "Northern Lights" version of an international music festival that might well have a major appeal.



14.12 Conclusions

One of the key findings of this research is the vast level of ignorance of the German respondents about Canada. In some cases, this plays to our advantage (e.g. “polite”, “caring”, “authentic”, “clean”). This ignorance is especially important when we consider how to develop new products because, in most cases, they actually are unaware of **existing** products – they frequently substitute stereotypes for actual knowledge; knowledge that they only gain by actually coming here.

For our German respondents, the best tool for selling Canada is **experiencing** Canada, with friend referrals coming second. This has a number of implications for both our tourism strategy and for our products. First of all, the CTC’s Canada: Keep Exploring campaign is exactly right for the German market, but the frontier imagery implicit in the campaign may need to be subtly modified to encompass Canadian culture.

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

Overall, German travelers may be characterized as “They Come for the Nature and Return for the Culture”. What does this say about Canada in the minds of Germans? First of all, their culturally sub-conscious stereotypes of Canada are close to 150 years old. We need to communicate that, in addition to having “authentic nature”, we have an “authentic culture” that transcends the aboriginal stereotypes from the 1880’s.

Second, we need to convince the Germans that Canada is an originator of culture – a culture (or set of cultures) that has successfully integrated “authentic nature” into it without either destroying it (their vision of the US) or “taming” it (their vision of themselves). We need to present Canada as both a physical (“nature”) frontier and a “cultural” frontier.

Finally, we have to accept that our marketing efforts must be two-fold: to those who have never been to Canada and to those who have. This is because of the strength of the German cultural stereotypes of Canada.



Section 15: The Travel Trade



15.1 Germany Travel Trade

1. Perceived Market Trends

a) Destination Trends

- ◆ The German travel trade has identified a few shifts in long-haul destination travel.
- ◆ Travel to the U.S. is down significantly due to difficulties dealing with homeland security, the Germans are significantly put off by this.

“Land checkpoints with lineups and finger printing”

- ◆ This is perceived to be one of the reasons why tourism to Canada and Australia/New Zealand is up.

b) Changing Needs

- ◆ The travel trade has identified several needs that have shifted in the consumer market.
 - ◆ More online activity in terms of sourcing information
 - ◆ Moderate increase in online booking. Germans still rely heavily on their travel agent for this, especially for long-haul.
 - ◆ More independence. The desire to travel FIT with package modules (mini tours) is up significantly for the under 60 market.
 - ◆ Wanting to string together several modules to create a FIT trip.
 - ◆ A desire for smaller, more boutique like hotels.
 - ◆ Duration of long-haul trip length may be shrinking. Typically Germans like to take several weeks (up to 4 to 5 weeks) to travel long-haul, but given the tougher economy employers are less willing to facilitate this.
 - ◆ The desire to combine a trip with another experience (like learning a language, massage courses or sports and fitness, etc.).



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c) Planning/Booking Trends

- ◆ Travellers are using the web for planning and destination decision making.
- ◆ Limited amount of booking online. Still a strong dependence on trade travel, especially long-haul.
- ◆ Virtually all travel agents surveyed said that travellers to Canada had all made up their mind to go to Canada prior to visiting the agent.
- ◆ Word of mouth among friends and family tend to wet appetites to “check out” on the web and then after they will go to the travel agent.
- ◆ The agent has little influence on selling Canada to first time travellers. However, they can and do have significant influence on promoting and marketing specific side trips, activities and modular packages.
- ◆ Also, they have significant influence with 2nd plus time travellers to Canada who have a huge appetite to see more. Repeat visitation to Canada was estimated by several members of the travel trade to be higher than 50%.

“When they come back from their first trip they come to me and say what can we do next in Canada?”

- ◆ Hence, Canada divided into “doable” regions/provinces that require more than one visit has significant appeal among 2nd plus time travellers.
- ◆ This can also work for first time travellers who need a gateway point which is often B.C.

d) Product/Packaging Trends

- ◆ Overall the existing packages are considered to be both acceptable and plentiful. One of the main reasons for this is that several of the travel agents who sell Canada or specializes in Canada feel that they have the flexibility to customize a package or create a custom package trip.
- ◆ The only underserved trend they identified is the consumers’ interest in working vacation modules where they would “plug” into a mini trip or even an event.



15.1 Germany Travel Trade

“mini package within”

“a special night or special event”

“travel with your own guide”

e) Advertising/Promotion Trends

- ◆ The travel trade focused mainly on two issues:
 - A lack of promotion and advertising for Canada in the German market.
 - Customer travel fairs and trade shows are becoming more and more popular.
- ◆ Several members of the travel trade encouraged that the CTC maximize their funds in these two areas.

f) Forecast For The Next Five Years

- ◆ Internet sourcing and booking will increase.
- ◆ Clients will become more and more demanding.
- ◆ Travel agencies that can develop strong customized trips will succeed.

This last point lays the ground work for where the CTC can be most effective for the trade.



15.1 Germany Travel Trade

2. Canada's Image

a) Canada's Competition

- ◆ In Germany agents could very easily identify Canada's main competition.

Short haul:

- ◆ Scandinavia/Nordic countries – similar product (nature), less expensive, less travel time, requires less stay time.

Long-Haul:

- ◆ America still popular but down significantly – iconic attractions/regionalized (can do one state like California and see a lot or just New York City or Florida for beach and Miami life, etc.)
 - That said, there are significant issues with the U.S. on its politics, people and customs.
- ◆ Australia/New Zealand – similar product (nature, expanse, vastness) but really far to travel to.

b) Canada's Strengths

- ◆ Still the U.S. is the major competitor for Canada. Canada's perceived strength over the U.S. are many and can be divided into two categories — longstanding and potentially short lived.

Longstanding:

- ◆ Unique nature and city combination in Canada

“The fact that you can be in pure nature that is untouched by man and in a short period of time drive into a modern and vibrant city”

- ◆ The U.S. is not seen as having a strong purity contrast between its nature and city offerings—in both there is greater perceived potential for pollution and crowding
- ◆ Can travel easily, safely and feeling with few worries. Concerns over being as free in the U.S.



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"More cautious in the U.S."

"Afraid that they may land in a suburb of LA"

"They are afraid in the U.S."

- ♦ Very nice and relatable people. Canadians are seen as having European values, sensitivity and open-mindedness

"Americans can be plastic and superficial"

- ♦ The politics of Canada are more in tune with those of Germans. World sensitive and accepting.

Short Lived

- ♦ Canada has a more acceptable political leader. Germany is waiting for Bush to go.

c) Canada's Weaknesses

- ♦ There are 4 perceived weaknesses regarding Canada
 1. That there is little promotion or advertising in order to wet people's appetites to start to think and talk about it.

"The small booth at the Stuttgart Fair says that Canada doesn't need the German travellers"

2. Price, the travel costs are expensive in comparison to other long haul destinations.
3. Length of stay, people assume that it takes a minimum of 3 weeks and up to 6 weeks to vacation in Canada due to its size and vastness. Given the difficulty in the German economy people are getting a little reluctant to ask for this amount of time.

This "length of time" also inflates the perceived cost because there is at least one extra week to have to pay for.



15.1 Germany Travel Trade

4. Positioned as a hard adventure destination. What travellers to Canada love most about Canada is that it is a soft adventure/recreational destination.

People have been scared off by Heli-skiing promotions and confronting grizzly bears in their natural habitats.

“They want to see the bears but they want to feel safe”

“It’s better just to promote the great skiing conditions and not the Heliskiing, people will go to specific companies for that kind of adventure.”

d) Ideal Brand Image

- ♦ The “nature combined with city” positioning of Canada is understood in a vague sense. Hence, Canada is for the most part past being perceived as just a nature destination. The travel trade strongly feels that this idea needs to be further crystallized and promoted in a meaningful way to the consumer.
- ♦ Almost all of the travel trade interviewed said that the unique appeal of Canada is the juxtaposition of nature and city.

“Unlimited nature, outdoors, activities, with the kindness of people and exciting, approachable cities.”

“Canada is pure nature, endless woods, mountains, and lakes with interesting cities.”

- ♦ Clearly, the nature/city position needs to be further pursued.
- ♦ For Germans, this makes Canada unique among its key competitors.
 - US—not as much pure nature; its cities are overcrowded and potentially dangerous.
 - Australia/NZ—too far away; same on nature, but not many cities and the cities aren’t as sophisticated. Long distances to drive between the cities.
- ♦ In addition to being unique among key competitors, Canada’s nature/city offering differentiates it strongly from Germany and Europe in general. The Germans feel that their country is not structured in anyway like Canada is.



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- ◆ They find Canada's lifestyle and structure extremely appealing, if not actually essential. Hence, the high level of repeat travel.

"Germans need a wide landscape, space it is part of the people's personality...we have very limited recreational opportunities."

- 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."

- ◆ The city/nature combination position speaks to two deep desires of the German people. It is the physical German environment that produces the desire for pure and untouched nature. And, it is the German requirement for quality, comfort, and luxury that produces their desire for some city life.
- ◆ The perceived benefit of Canadian city culture to Germans is that it is relaxed, freer, and less restricted, judgmental, rigid, and work oriented than German city culture.
- ◆ Because of the friendliness of the Canadian people, Germans consider Canada to be a safe country to travel freely in.

"It is the fact that Germans can move around freely in Canada."

- ◆ This all points to the Canadian lifestyle being highly aspirational.
- ◆ Thus, when Germans travel to Canada they want to live the lifestyle through touring, caravanning, and experiencing cities. They find it very easy to execute this kind of trip. It is easier to do so in Canada than in most other countries.



15.1 Germany Travel Trade

3. Travel Products

a) Common Itineraries

i) Western Canada

- ◆ This is by far the most common destination for Germans, according to the trade. It is usually the trip that first time travellers take.
 - 3 to 4 weeks
 - Includes Vancouver, rest of BC, and can include Alaska and/or Alberta.
 - Self created itineraries or developed by travel agent
 - Car rental/accommodations or caravan
 - Has some mini-packages or “modules”
- ◆ This is the trip that drives German’s appetite for Canada, causing them to come back and see more.

ii) East Coast

- 2 to 3 weeks
- Halifax and surrounding provinces, including Newfoundland
- Car rental/accommodations or caravan
- Mini packages or “modules”

iii) Central Canada (Toronto and Montreal)

- 3 to 4 weeks
- Toronto, Niagara Falls, mini-tours, National Parks, Montreal/Quebec Tours.
- Car rental/accommodations or caravan



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iv) Yukon/Alberta/Alaska

- 3 to 5 weeks
- Alberta entry point
- Fly, drive, and hike

v) Northwest Territories/Alberta

- 3 to 5 weeks
- Alberta entry point
- Fly, drive, and hike

vi) Atlantic Canada

- ◆ Atlantic Canada is often the region of choice after the initial West coast trip is completed. Travel agents say that the draw is a different sea shore and a desire to experience another terrain and Irish influenced area.
- ◆ Agents believe that there is an opportunity to promote Atlantic Canada to both first and second time travellers through its strengths.
 - Proximity—relatively short and direct flights
 - Is doable in two weeks (because of shorter flight times), which feeds into the trend of needing to take shorter vacations.
 - Culturally unique
 - Iceberg viewing
 - Bird watching
 - Camping and caravanning opportunities



15.1 Germany Travel Trade

b) Product Opportunities

- ◆ Most travel trade interviewed felt that Canada has an abundance to offer the German consumer.
- ◆ They felt that the primary target is:
 - The independent traveller
 - Empty nesters, couples without children
 - Higher income
 - Higher education
 - Knows some English
 - Aged 40 plus, or pre-family
 - Recreational touring oriented
- ◆ A number of existing, appealing types of trips exist(as mentioned earlier), and the trade suggested the following additional ones:
 - Northwest Territories/Nunavut nature and aboriginal culture tours.
 - Icebergs
 - Manitoba bears
 - Shorter (2 week) excursions to: Toronto area, East Coast, Quebec.
 - Beach vacations
 - Fly passes for interior Canada
 - Toronto Christmas shopping
 - Specific wildlife tours: bird watch, animal tours/safari



15.1 Germany Travel Trade

4. Repositioning Canada

- ◆ It is less a matter of repositioning Canada than it is crystallizing existing perceptions and stressing city and cultural richness.
- ◆ Stay away from extreme sports and hard adventure.
 - *“People are afraid of the wildlife, even though they want to see it.”*
 - *“Too much focus on hard adventure makes Canada less accessible to the older target.”*
- ◆ Balance the image is crucial. Nature that is unique to Canada is still the draw; however include the benefits of having culturally vibrant cities. The two together creates a unique and very relevant product.
 - *“They can have as much nature or city as they want or need.”*
 - *“Civilization, if you like it.”*
- ◆ Emphasize the **ease**. First time travellers are unaware of how easy it is to travel to, and in, Canada.
 - *“There are so many things that are familiar and easy, and yet it is a unique environment and culture.”*



15.1 Germany Travel Trade

5. Trade Support

a) Improving Marketing

Suggestions include:

- ◆ More financial help for the marketing initiatives of the German travel trade.
- ◆ Partnerships/affiliation with globetrotter.de (a German travel site with travel supplies, a forum, information, etc.)
- ◆ While representing Canada as a whole, sensitivity to the need for regionalized travel is important. This will reduce the image of Canada as a huge destination that must be taken in through a single long trip into a collection of provinces that can be visited individually or together to form a fuller Canadian trip. For 1st time travellers this provides a point of entry and direction on what to do. For return visitors it feeds into their need to explore more of the country, telling them what region/province(s) is “next”. This kind of representation is considered to be vital in brochures.
- ◆ Canada needs to seem closer. Currently, the media presence of the US makes it seem like somewhere that isn’t too far away. However, Canada’s relative lack of media presence creates the impression that it is a very remote destination. Additional presence as well as stressing that the east coast is a 6 hour flight away can reduce this.
- ◆ The trade pointed out that the consumer booth at Stuttgart is not making a good impression. It needs more support, to look like it has received a good amount of attention, and thus Germany is considered important.
- ◆ Some wondered if marketing money was being spent effectively, citing some examples of moves they didn’t understand (for example the Coffee Shop promotions). Explaining to the trade the purpose of marketing initiatives was suggested as a way to improve those initiatives, get the trade involved in them, and all over increase ties and support.
- ◆ The key marketing message suggested is that Canada should be presented as an easy destination.



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b) CTC Activity

- ◆ The Canadian specialist program is considered effective and helpful. Specifically they appreciated the e-mail contact and responsiveness of the CTC to their questions and needs.

c) Improving CTC Service

- ◆ FAM program.
- ◆ Ensuring that vouchers and other promotions offered in Germany are understood/accepted by the Canadian hotels, restaurants, and other amenities they apply to.
- ◆ Greater support for marketing initiatives by travel agents.
- ◆ More information on each region.
- ◆ Materials that focus on the needs and wants of the German market. Because German consumers think of Canada as too large to do all at once, it needs to be broken up into clear pieces for them and laid out easily. For example:
 - Province by province explanations (what to do in which one)
 - Getting from province to province



15.1 Germany Travel Trade

6. Canadian Receptives

a) Product Needs

- Receptives are very close to the grounds when it comes to the needs of the German traveller. They reiterate the importance of:
 - Authentic experiences (a key selling point for Canada)
 - Getting out into rural communities

“They are not so turned on by our cities as much as small villages. When they reach a place (Atlantic Canada) with a population of 300 people, they get really excited. It’s just so real”

- In the smaller places they have a chance to relax and be themselves—so important as discussed in the Emotional Laddering section earlier.
- The friendly, gentle character of the Canadian people is also a real attraction.
- A sense of involvement in Canadian culture—past or present:

“They can make their own dream catchers in Western Canada (at aboriginal sites)”

b) Communication

- Receptives also agree that it is important :
 - Not to oversell the cities
 - Focus on the authenticity of experiences
 - Feature welcoming people—a real unique selling point of Canada
 - Talk about the extensive opportunities to get intimately involved with nature
 - Do not feature big chain hotels, but rather smaller lodges, chalets, etc



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c) Trade Assistance

- Canadian receptives have their own point of view when it comes to marketing ideas:
 - The CTC and the partners need to work together better to create synergy
 - Do joint ventures with outdoor clothing manufacturers, water companies and other organizations which can benefit from the Canadian brand association.
 - Invest more in its trade show presence
 - “The Canadian booth at the Berlin Trade Show was pathetic”*
 - “See how Australia does it”*
 - Consider activity in peripheral markets that have been abandoned in recent years. There is real potential here



15.1 Germany Travel Trade

Travel Trade Summary

- German travellers often refer to Canada as their natural playground and the travel trade supports that perception.
- They see real opportunities to generate repeat travel, especially given the amount of holiday time Germans typically have.
- Further, Canada should be marketed as a series of regions, promoting the opportunities for Germans to immerse themselves in a particular area.
 - Unlike many other foreign markets (particularly Asia/Pacific countries), Germans do not feel a need to see all of Canada in one trip
- Although Western Canada is a prime first time attraction, there is a particularly high interest in the North, including aboriginal experiences, wildlife viewing, etc.
- To facilitate repeat travel, they suggest reinforcing how close Canada is, how accessible it is.
 - *"The east coast is only 6 hours away"*
 - *"Emphasize the ease of getting to Canada"*
- The Canadian specialist programme is viewed very favourably. Designated specialists appreciate the attentiveness they receive from the CTC.
- However, on the other hand, the travel trade was somewhat critical of Canadian booths at the major shows. They do not appear to measure up to expectations and the level of quality that a Canadian exhibit should project. This includes shows in Stuttgart as well as Berlin.



Appendix



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

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October 10, 2007
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German Travel Survey

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

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

- Baden-Wuerttemberg
 - Bavaria
 - Berlin
 - Brandenburg
 - Bremen
 - Hamburg
 - Hesse
 - Lower Saxony
 - Mecklenburg-Western Pomerania
 - North-Rhine
 - Rhineland
 - Saarland
 - Saxony
 - Saxony-Anhalt
 - Schleswig-Holstein
 - Thuringia
 - None of the above
- TERMINATE

2) Are you...

- Male 50/50 GENDER SPLIT
- Female

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

- Under 18 END INTERVIEW
 - 18-19
 - 20-24
 - 25-29
 - 30-34
 - 35-39
 - 40-44
 - 45-49
 - 50-54
 - 55-59
 - 60-64
 - 65-69
 - 70-74
 - 75 and over
- MINIMUM N=100 OF AGED 60+

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

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

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

_____ trips [ACCEPT RANGE 1-99]

None

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

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

_____ trips [ACCEPT RANGE 1-99] [MUST BE EQUAL OR LESS THAN Q.3C]

None

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

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

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



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

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

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

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



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

Russia	Russia	<input type="checkbox"/>	1	
Orient/Asia	China	<input type="checkbox"/>	2	
	Hong Kong	<input type="checkbox"/>	3	
	Japan	<input type="checkbox"/>	4	
	Singapore	<input type="checkbox"/>	5	
	Malaysia	<input type="checkbox"/>	6	
	Thailand	<input type="checkbox"/>	7	
	Vietnam	<input type="checkbox"/>	8	
	India	<input type="checkbox"/>	9	
Pacific	Other Orient/Asia	<input type="checkbox"/>	10	
	Australia	<input type="checkbox"/>	11	
	New Zealand	<input type="checkbox"/>	12	
	Other Pacific	<input type="checkbox"/>	13	
Eastern Europe	Bulgaria	<input type="checkbox"/>	14	
	Czech Republic	<input type="checkbox"/>	15	
	Hungary	<input type="checkbox"/>	16	
	Poland	<input type="checkbox"/>	17	
	Romania	<input type="checkbox"/>	18	
	Other Eastern Europe	<input type="checkbox"/>	19	
	Western Europe	Austria	<input type="checkbox"/>	20
		Belgium	<input type="checkbox"/>	21
		France	<input type="checkbox"/>	22
		United Kingdom	<input type="checkbox"/>	23
Greece		<input type="checkbox"/>	24	
Ireland		<input type="checkbox"/>	25	
Italy		<input type="checkbox"/>	26	
Netherlands		<input type="checkbox"/>	27	
Portugal		<input type="checkbox"/>	28	
Spain		<input type="checkbox"/>	29	
	Switzerland	<input type="checkbox"/>	30	
	Other Europe	<input type="checkbox"/>	31	
North America	Canada	<input type="checkbox"/>	32	
	United States	<input type="checkbox"/>	33	
South/Central America	Argentina	<input type="checkbox"/>	34	
	Brazil	<input type="checkbox"/>	35	
	Mexico	<input type="checkbox"/>	36	
	Other South Central America	<input type="checkbox"/>	37	
Caribbean	Caribbean	<input type="checkbox"/>	38	
	Dubai	<input type="checkbox"/>	39	
Middle East	Iran	<input type="checkbox"/>	40	
	Israel	<input type="checkbox"/>	41	
	Lebanon	<input type="checkbox"/>	42	
	Turkey	<input type="checkbox"/>	43	
	United Arab Emirates	<input type="checkbox"/>	44	
	Other Middle East	<input type="checkbox"/>	45	
	Africa	Egypt	<input type="checkbox"/>	46
Kenya		<input type="checkbox"/>	47	
Morocco		<input type="checkbox"/>	48	
Tanzania		<input type="checkbox"/>	49	
Tunisia		<input type="checkbox"/>	50	
South Africa		<input type="checkbox"/>	51	
Other Africa	<input type="checkbox"/>	52		
	53 BLANK	<input type="checkbox"/>		
	Other (specify) _____	<input type="checkbox"/>	54	
	Other (specify) _____	<input type="checkbox"/>	55	
	Other (specify) _____	<input type="checkbox"/>	56	
	None	<input type="checkbox"/>		

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

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(ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF CANADA IS NOT SELECTED IN Q.7) (QUOTA N=400 FOR AUGMENT IS BASED ON CANADA SELECTED IN Q.7)
(PN: AUGMENT QUOTA – 400 IN TOTAL MUST SELECT CANADA IN Q7 (INCLUDES THOSE FROM THE MAIN SAMPLE (FOR EXAMPLE IF WE OBTAIN 100 FROM THE MAIN SAMPLE ONLY NEED 300 – FLAG THOSE FROM THE MAIN SAMPLE VS. AUGMENT)

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

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

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



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

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

9a) What were your reasons for travelling to (Q.8a DESTINATION -PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? (check as many as apply).
9b) Which of those was your main reason for travel? (please check one only) [PN: SHOW THOSE CHECKED IN Q.8a]

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

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

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

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

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

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

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

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

TOTAL MUST EQUAL ANSWER TO Q.10b)

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

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

MUST CHECK ONE

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

Travelled alone SKIP TO Q.14a

Wife/husband/girlfriend/boyfriend

Child(ren)

Parent(s)

Other relatives

Friends

Organized group/club/etc

Business associates/colleagues

Other (specify) _____

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

_____ People [2-99]

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

_____ People [0-99] **PN: SHOULD BE LESS THAN Q.13A**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- Yes
- No **SKIP TO Q.17c**

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

- Car rental
- Airport transfer
- Guided tours at destination
- Restaurant Meals
- Entertainments
- Admission to local attractions
- Outdoor activities
- Ground transportation between overnight destinations
- Other
- Nothing else included

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

- Yes
- No

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

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

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

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

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

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	Yes	No
Seeing old architecture	<input type="checkbox"/>	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>	<input type="checkbox"/>
Visiting world heritage sites	<input type="checkbox"/>	<input type="checkbox"/>
Seeing modern architecture	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>	<input type="checkbox"/>
Visiting friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Viewing mountains	<input type="checkbox"/>	<input type="checkbox"/>
Viewing glaciers	<input type="checkbox"/>	<input type="checkbox"/>
Viewing rivers or waterfalls	<input type="checkbox"/>	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful beaches and coastlines	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>	<input type="checkbox"/>
Sport fishing	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
Helicopter skiing	<input type="checkbox"/>	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>	<input type="checkbox"/>
Taking a rail tour	<input type="checkbox"/>	<input type="checkbox"/>
Fine dining	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Visiting hot springs	<input type="checkbox"/>	<input type="checkbox"/>
Staying at a luxury resort	<input type="checkbox"/>	<input type="checkbox"/>
Taking a garden or flower	<input type="checkbox"/>	<input type="checkbox"/>
Observing wildlife in their ^{Not in UK} environment	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or galleries	<input type="checkbox"/>	<input type="checkbox"/>
Studying English	<input type="checkbox"/>	<input type="checkbox"/>
Viewing autumn leaves	<input type="checkbox"/>	<input type="checkbox"/>
Viewing aurora borealis (Northern lights)	<input type="checkbox"/>	<input type="checkbox"/>
Camping in a natural setting	<input type="checkbox"/>	<input type="checkbox"/>
Attending festivals or fairs	<input type="checkbox"/>	<input type="checkbox"/>
Attending professional sports events	<input type="checkbox"/>	<input type="checkbox"/>
Attending rodeos	<input type="checkbox"/>	<input type="checkbox"/>
Trail riding on horseback	<input type="checkbox"/>	<input type="checkbox"/>
Taking a wine/culinary tour	<input type="checkbox"/>	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>	<input type="checkbox"/>
Visiting small towns	<input type="checkbox"/>	<input type="checkbox"/>
Visiting casinos	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
Taking city tours	<input type="checkbox"/>	<input type="checkbox"/>
Taking nature tours	<input type="checkbox"/>	<input type="checkbox"/>

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

- Under €1,000
- €1,000 - €1,999
- €2,000 - €3,999
- €4,000 - €5,999
- €6,000 - €7,999
- €8,000 - €9,999
- €10,000 - €14,999
- €15,000+

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

- Excellent value for money
- Very good value for money
- Good value for money
- Fair value for money
- Poor value for money

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

- Definitely will recommend to others
- Very likely
- Somewhat likely
- Not very likely
- Not at all likely
- Definitely will not recommend to others

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

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

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

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ASK EVERYONE

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

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

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

RANDOMIZE ORDER OF DESTINATION LIST

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

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

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

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

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

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

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

Yes
No **SKIP TO Q.26**

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

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

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

Season

January – March 1
 April – June 2
 July – September 3
 October – December 4

Type of Tour

Group tour 1
 Non-group (immediate party only) 2
 (IF GROUP TOUR) Would you prefer:
 All days organized with the group, or 1
 Many free days on your own 2
 (IF NON-GROUP) Would you:
 Buy air, accommodation, etc. as part of a package, or 1
 Buy air, accommodation, and other components separately 2

Would Also Visit Overnight or Longer (ALLOW MORE THAN ONE ANSWER)

U.S.A.
 Other countries
 Canada only

Provinces Likely to Visit (Please check all that apply)

British Columbia (includes Vancouver, Victoria and Whistler) 1
 Alberta (includes Calgary, Edmonton, Banff, and Jasper) 2
 Saskatchewan (province) 3
 Manitoba (province) 4
 Ontario (includes Ottawa, Toronto and Niagara Falls) 5
 Quebec (includes Montreal and Quebec City) 6
 Nova Scotia (Atlantic Canada) 7
 New Brunswick (Atlantic Canada) 8
 Prince Edward Island (Atlantic Canada) 9
 Newfoundland and Labrador (Atlantic Canada) 10
 Yukon Territory (Northern Canada) 11
 Northwest Territories (Northern Canada) 12
 Nunavut (Northern Canada) 13

Preferred type of accommodation for one or more nights on trip (MAXIMUM 3):

Mountain resort
 Seaside resort
 Lakeside resort
 Ski resort
 City hotel
 On a farm
 On a ranch
 B&B (bed & breakfast)
 Coastal cruise ship
 Canadian spa
 Authentic wilderness cabin or lodge
 Camping
 Caravan/motor home
 Home of friend or relative

Participate in any of the following activities (RANDOMIZE LIST)

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
Downhill skiing or snowboarding	<input type="checkbox"/>
Snowmobiling	<input type="checkbox"/>
Helicopt skiing	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>
Sports fishing	<input type="checkbox"/>
Golfing	<input type="checkbox"/>
Trail riding on horseback	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>
Seeing modern architecture	<input type="checkbox"/>
Experiencing French Canadian culture and cuisine	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>
Taking a garden or flower tour	<input type="checkbox"/>
Observing wildlife in their natural environment	<input type="checkbox"/>
Viewing mountains	<input type="checkbox"/>
Viewing rivers or waterfalls	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>
Viewing autumn leaves	<input type="checkbox"/>
Viewing aurora borealis (Northern lights)	<input type="checkbox"/>
Taking a wine/culinary tour	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>

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

Travel in Canada between centres by any of the following:

Air
 Rental car
 Motor coach
 Motor home/camper
 Rail
 Private car
 Other (please specify)

Duration in Canada _____
 _____ nights (1 to 999)

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

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

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



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ASK EVERYONE

27a) To what extent do you agree or disagree with the following statement?
It is very important to me that I take action on a daily basis to reduce my impact on the environment by adopting environmentally-friendly measures such as recycling, conserving water.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

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

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

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

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

(PN: PROGRAMMING: ASK ALL RESPONDENTS)

DEMOGRAPHICS:

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

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

- Yes
- No
- Don't know

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

- 1 person 1
- 2-3 people 2
- 4-5 people 3
- 6 or more people 4

(PN: PROGRAMMING: IF CODE 1 SKIP TO Q.31)

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October 10, 2007
T703-07 FINAL

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

- 1 person 1
- 2 people 2
- 3 people 3
- 4 people 4
- 5 people 5
- 6 or more people 6
- None 7

31) What is your marital status? (Please select one)

- Married or living with someone
- Single
- Divorced / separated
- Widow / widower
- Prefer not to answer

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

- Student 1
- Semi or unskilled manual worker (e.g., manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant) 2
- Skilled manual worker (e.g., skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, AA patrolman, pub/bar worker, etc.) 3
- Supervisory or clerical / junior managerial / professional / administrative (e.g., office worker, student doctor, foreman with 25+ employees, salesperson, etc.) 4
- Intermediate managerial / professional / administrative (e.g., newly qualified (under 3 years) doctor, solicitor, board director in small organization, middle manager in large organization, principle officer in civil service/ local government) 5
- Higher managerial / professional / administrative (e.g., established doctor, solicitor, board director in a large organization (200+ employees), top level civil servant/public service employee) 6
- Self-employed 7
- Employed part-time 8
- Housewife/husband 9
- Unemployed 10
- Retired / Semi-Retired 11
- Other 12
- Prefer not to answer 99

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

- Less than secondary school
- Secondary school level 1
- Secondary school level 2 / vocational school
- Vocational continuing education
- University
- Graduate school
- Prefer not to answer

34) Which of the following categories best describes your average monthly household income after taxes in 2006 and social security contribution? Please include all wages, salaries, pensions and income from other sources. Please choose one answer that applies.

- Less than €1,800
- €1,800 - €2,299
- €2,300 - €2,799
- €2,800 - €3,299
- €3,300 - €3,799
- €3,800 - €4,299

- €4,300 or more
- Prefer not to answer

THANK YOU



Travel Trade Interview Guide

Germany
July, 2007
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German Travel Trade Interview

Organization: _____
 Type: Retail [] Wholesale [] Both Retail/Wholesale [] Airline []
 Name: _____
 Title/Position: _____
 Proportion of Long Haul to Short Haul Business: _____

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Current Perceived Trends in the German Travel Market

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

- Destinations
- Travel retailing.

- 1) Thinking over the past few years, what trends or changes have you seen in the long-haul travel market in terms of destinations? For example, are some countries becoming more popular and are some becoming less? If so, which ones? (Assess trends with Canada.)

- 2) Have consumer needs changed in any way? PROBE ON MORE EXPERIENTIAL TRIPS, INTERESTS OR ACTIVITIES, PLANNING/BOOKING LEAD TIMES, PARTY COMPOSITION, ETC

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

- 4) Have the products or packages available changed over the past few years—including the kinds of experiences travelers are seeking, duration, etc? If so, in what way?

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

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

Canada's Image vs. Competitors

Objective: this section is to understand the trade's perceived competition set for Canada and its image.

- 7) Who are Canada's main competitors among other long-haul destinations? Why? (ONCE THE RESPONDENT HAS HAD A CHANCE TO GIVE THEIR OPINION THEN PROBE SPECIFICALLY ON THE FOLLOWING COUNTRIES: EUROPE GENERAL, UNITED STATES, CHINA, ASIA, MIDDLE EAST, AUSTRALIA/NEW ZEALAND).

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- 8) In your opinion, are these a different set of competitors from a few years ago or the same? If different, why? (AGAIN DRILL DOWN ON ABOVE MENTIONED COUNTRIES)

- 9) What are Canada's **strengths/advantages** over competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC AND ATTACHED TO THE COMPETING COUNTRY)

- 10) What are Canada's **weaknesses/disadvantages** compared to competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC TO THE COMPETING COUNTRY)

- 11) What kind of Brand Image do you think Canada **should have** as a pleasure destination? What aspects should it promote about itself?

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- 12) What are your current attitudes towards U.S. travel and its products? Have they changed over the past few years? Are they likely to change in the near future? (ASSESS IN WHAT WAY THESE PERCEPTIONS ARE RUBBING OFF ON CANADA IN EITHER A POSITIVE OR NEGATIVE WAY)

Travel Products

The objective of this section is to gather impressions that the trade has about travel products.

- 13) On what basis do German people choose their vacation products or packages? What is the relative importance of price, itinerary, accommodations, destination appeal, convenience, availability of flights, good food, safety, shopping opportunities, reputation, etc.? Can you rank or prioritize those for me? (PROBE SPECIFICALLY IF ANY CHANGES HERE HAVE AFFECTED TRAVEL TO CANADA) Have there been any changes?

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

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- 15) What are the most desired or popular travel products or packages for Canada that German people are buying? In other words, what are they asking for? Detail independent vs. group tour, duration of trip, places visited, main activities. Obtain wholesale/agent brochures and mark on them the most popular products. (ASSESS IF THEY ARE STILL CONSIDERED TO BE CURRENT AND ATTRACTIVE OR HAVE THEY BECOME LESS RELEVANT AND ATTRACTIVE)
- 16) To what degree do you encourage travel to all or any of the regions in Canada? (PROBE BRITISH COLUMBIA, ALBERTA, NORTHERN TERRITORIES, PRAIRIES, ONTARIO, QUEBEC, ATLANTIC CANADA)

- 17) How is the profile of your Canada destined clients different from those destined to other long-haul destinations, if at all? (LOOK FOR DEMOGRAPHIC DIFFERENCE – e.g. AGE, INCOME, EDUCATION, FAMILY STATUS, ETC. PROBE FOR CHANGES IN ANY OF THE TARGETS)

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New Product Ideas

- 18) What kinds of vacations should Canada now be offering to attract either existing or new targets. (Details independent vs. group tour, duration, places visited, main activities.) (MAKE SURE THE FEEDBACK IS SPECIFIC, THIS IS A VERY IMPORTANT QUESTION.)
- 19) What travel packages or products are available to other destinations that would be ideal for Canada? Can we get an idea for new packages for Canada from them? (Detail destinations and relevant package details. Obtain brochures where possible and mark the key vacation product opportunities.) (MAKE SURE THE FEEDBACK IS VERY SPECIFIC)

Travel Barriers

Objective: To uncover the trade's perceptions of barriers and weaknesses in selling Canada.

- 20) What are the major barriers or weaknesses holding people back from vacationing in Canada? (Obtain details, probe why and how to resolve.) (For example, if airline capacity is an issue, determine details on desired frequency, timing, and to what cities.) What complaints have you heard from clients? Barriers could include airline capacity, pricing, lack of knowledge, lack of packages, destinations choice issues, activity issues, accommodation issues, loss of "wow" factor.)

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21) What specific problems have you experienced in selling Canada? Can you provide suggestions on anything Canada can do to overcome these weaknesses or barriers?

24) Specifically
i Assistance for the trade (RECORD DETAILS)

22) General interest in Canada as a dream vacation is very high – often at the top of the list. Yet, the number of travellers actually going to Canada is relatively small. Why is that? What is holding people back? What are they afraid of?

ii Product development? (RECORD DETAILS)

Trade Support

Objective: to understand the areas where the trade needs additional or more support in selling Canada.

iii What key marketing messages/themes would you suggest to sell Canada to potential travelers from Germany? (RECORD DETAILS)

23) What can Canadian travel industry do to improve its marketing in Germany? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC. PROBE DEEPLY)

25) What would be your top 3 recommendations for the Canadian tourism industry to increase tourism from Germany?



Travel Trade Interview Guide

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- 26) How much contact do you have with Canadian officials regarding increasing travel to Canada? What is the nature of this contact? What do you think they could do to help raise holiday travel? What could they do to help you raise holiday travel to Canada?

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- 28) Are the brochures they provide to trade effective? Can you show me any outstanding brochures for other countries that are really effective? (ATTEMPT TO OBTAIN A COPY)

- 27) Do you have any comments on the Canadian Tourism Commission? Please be honest in your comments. Your concerns, suggested improvements, or complaints would be very valuable to us.

- 29) Do you have any other comments or questions?

i Any complaints?

ii What is it doing right?

iii Ways it could improve its service to you?

iv Do you receive office e-mail correspondence from the Canadian Tourist office? Is it effective? How could it be improved?

THANK YOU



European Discussion Guide – Prospective Visitors



T703-07
July, 2007

European Discussion Guide Prospective Visitors

1. Background and Introduction (10 min)

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

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

Background on Respondents

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

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Moderator Instruction:

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

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

Ask for:

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

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

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

- I would like you to take a look at these sheets of travel logs we have created and tell me if you can identify or see any kinds of patterns. (For example: certain types of travel depending on the year or, certain places that are popular depending on the time of year, etc.).
- Determine if:
 - Some patterns exist and why.
 - Some destinations are becoming more or less popular and why.
 - Interests in travel are changing, in other words peoples' interests in the type of holiday/vacation they take have changed (example: more sun or mini breaks).
 - New types of packages or offerings have emerged.

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European Discussion Guide – Prospective Visitors

2. Buy Cycle / Behaviour Analysis (25 min)

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Moderator: Write the Buy Cycle Model on the board/ sheets for discussion.

- Here are the steps that many people tell us they go through when planning a trip overseas. REVIEW WITH GROUP
- Do you agree with this as a general model? Shall we modify it in some way? MODIFY AS APPROPRIATE

TRAVEL PLANNING BUY CYCLE

Step 1—AWARE: You first hear about the destination.

Step 2—ON DREAM LIST: It becomes a destination that you dream about going to some day in the future, not necessarily in the immediate future.

Step 3—ON CONSIDER LIST FOR NEAR FUTURE: Now you are thinking about going there in the next year or two. Something made you want to go there very soon.

Step 4—CHECK OUT TRIP VIABILITY: You start to gather information on the basic parameters—is it doable, is it affordable, how much time do I need, how long is the flight, will the trip be enjoyable?

Step 5—CREATING A "VACATION MOVIE" IN YOUR HEAD: This is where you really start your serious investigation. Trying to get an idea of specifically what you would be doing during the day, in the evening, whether there will be enough to do, reassuring yourself that this will be a truly memorable experience.

Step 6—PUTTING TOGETHER THE FINAL VACATION: This involves choosing the right package, or working out the details of flights and land arrangements at the destination.

Step 7—BUYING THE TICKET OR PACKAGE: This is the final planning step—committing to the trip.

Buy Cycle For Competitive Destination

- Now, let's talk about your one of your recent trips overseas (Moderator—for each respondent, pick one of Canada's key competitors, not Canada itself)
- For **each** step:
 - What actually happened to get you to that stage?
 - What/who were the influencers (e.g. media, friends, etc)?
 - What sources of information did you use?

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- For example, how did the destination get on your **dream list** as a place to visit sometime in the future?
 - What were the main influences—something you saw on television (what specifically)? A friend's advise (what did they say specifically)? Something you read?
- What made you feel comfortable enough to go on to the next stage?
 - What had you learned about the destination that motivated you to want to go to the next stage?
 - What was really appealing to you at this point?
 - What feelings or emotions did you have?
- **Moderator—capture very specific detail on influencers, source of information, destination appeals and feelings at each step**
- **Summarize** what the key influencers, sources of information, appeals and feelings at each step to move the traveler through the decision process.
- What are the most important media to promote a destination at each stage?

3. Buy Cycle For Canada

- Let's talk about Canada on the same Buy Cycle Model.
- Where are you now personally—at what step?
- What got you to that point? Probe all the influencers.
 - What sources of information got you there (probe or each step up to that point)?
 - What did you learn from that information about Canada that got you there?
- Why have you not moved farther?
 - Where are the bottlenecks?
 - What are the barriers?
 - What are you concerns? Your fears?
 - What information is missing that would allow you to move on?
 - What emotions are missing to make you want to go now?

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European Discussion Guide – Prospective Visitors

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4. Explore Free Association (In-Depth) Outbound Trips (15 min)

- I would like to do an interesting exercise with you on two destinations:
 - Canada
 - Other competing destination
- It is a type of free association, it is a way for us to write down as many thoughts, feelings, and associations with a particular destination. Here is an example that has been generated ahead of time. (Go through the example quickly to show how one association can branch off in a variety of ways, show how the mindmap captures thoughts as well as feelings, how both positives and negatives can emerge, and how symbols or drawings can be used instead of words).
- Work with the group to get mind mapping thoughts on an easel or board.
- Review branches for Canada first (listen for patterns/repeats).
- What is the one branch that stands out for you?
 - Understand:
 - Importance
 - Significance
 - Meaning
 - Discuss countries strengths and weaknesses and overall image.

REPEAT FOR OTHER COMPETING COUNTRIES

5. Canada's Current Image (15 min)

The main objective is to understand current perceptions of Canada—strengths and barriers

- Let's talk more specifically about the appeals of Canada.
 - What would be the main reasons to go?
 - What does Canada offer that appeals to people like yourself?
 - How do you see a typical day on a Canadian vacation?
 - What specific activities would you like to participate in?
 - What specific things would you like to see?
- Now let's talk about the negative side.
 - What is holding you back?

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- Why do so many people have Canada on their dream trip list, but never get around to going?
- What are all the possible reasons for holding back/putting the decision off?
- Would there be enough to do? Enough to see?
- Or is it the stronger appeal of other destinations?
- If so, what does Canada lack that they have?

6. Picture Sort (10 min)

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

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

7. Creating The Ideal Trip (15 min)

- I have some brochures on vacationing in Canada.
- I'd like each of you to work with this material and create an ideal vacation experience.
- Use the pictures that we previously looked at and the brochures as references and write down the details for your ideal trip on the paper provided
 - We need to know specifically where in Canada you would travel
 - In what season
 - For how long you would be away
 - What activities you would do in each place—whether active or simply sightseeing
 - Whether you would want to be involved in any hobbies or special interests you have personally
 - What you expect to be the most memorable highlights of the trip—especially stories that you would tell when you return home

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European Discussion Guide – Prospective Visitors

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- Summarize:
 - What types of trips are most appealing?
 - Have your impressions of a vacation in Canada changed in any way after reviewing this material? In what way and why?
- Do these brochures address the kinds of vacations you are looking for?
 - Do they provide the kind of information needed to entice you?
 - Is there enough detail and imagery for you to create that “movie” in your head?
 - In what way are they inadequate?
 - What do they need to focus on to appeal to more people?
- Now that you have been through this detailed information, describe that your personal “movie” about a trip to Canada—what you visualize, where, how you are feeling.

8. 2010 Olympics (5 min)

- The 2010 Olympics are to be held in Vancouver, British Columbia
- Were you aware of that?
- Any interest in attending?
- Will you be watching the Olympics on television?
- How do you expect the Olympics to change or enhance people’s image of Canada?



European Discussion Guide – Recent Visitors



T703-07
July, 2007

European Discussion Guide Recent Visitors

1. Background and Introduction (10 min)

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

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Background on Respondents

- Have participants introduce themselves.
 - Name.
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 - Do you pick travel destinations based on any of your interests?
 - If so, what have you done, where have you gone?

Moderator Instruction:

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

Ask for:

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

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

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

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

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European Discussion Guide – Recent Visitors

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2. Story Telling (15 min)

- Can you read us the stories that you wrote out in advance of the group about your trip to Canada?
- Are there any common activities or feelings here among all these stories?

3. Buy Cycle/ Behaviour Analysis (25 min)

Moderator: Write the Buy Cycle Model on the board/ sheets for discussion.

- Here are the steps that many people tell us they go through when planning a trip overseas. REVIEW WITH GROUP
- Do you agree with this as a general model? Shall we modify it in some way? MODIFY AS APPROPRIATE

TRAVEL PLANNING BUY CYCLE

Step 1--AWARE: You first hear about the destination.

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Step 4--CHECK OUT TRIP VIABILITY: You start to gather information on the basic parameters—is it doable, is it affordable, how much time do I need, how long is the flight, will the trip be enjoyable?

Step 5--CREATING A "VACATION MOVIE" IN YOUR HEAD: This is where you really start your serious investigation. Trying to get an idea of specifically what you would be doing during the day, in the evening, whether there will be enough to do, reassuring yourself that this will be a truly memorable experience.

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Step 7--BUYING THE TICKET OR PACKAGE: This is the final planning step--committing to the trip.

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Buy Cycle For Canada

- Now, let's talk about your recent trip to Canada
- For each step:
 - What actually happened to get you to that stage?
 - What/who were the influencers (e.g. media, friends, etc)?
 - What sources of information did you use?
- For example, how did the destination get on your **dream list** as a place to visit sometime in the future?
 - What were the main influences—something you saw on television (what specifically)? A friend's advise (what did they say specifically)? Something you read?
- What made you feel comfortable enough to go on to the next stage?
 - What had you learned about the destination that motivated you to want to go to the next stage?
 - What was really appealing to you at this point?
 - What feelings or emotions did you have?
- **Moderator--capture very specific detail on influencers, source of information, destination appeals and feelings at each step**
- **Summarize** what the key influencers, sources of information, appeals and feelings at each step to move the traveler through the decision process.
- What are the most important media to promote a destination at each stage?

Buy Cycle For Competitive Destination Trip

- Now, let's talk about your one of your recent trips to another long haul destination
- REPEAT ABOVE FOR RECENT TRIP. TRY TO COVER A RANGE OF COMPETITIVE DESTINATIONS

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European Discussion Guide – Recent Visitors

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4. Explore Free Association (In-Depth) Outbound Trips (15 min)

- I would like to do an interesting exercise with you on two destinations:
 - Canada
 - Other competing destination
- It is a type of free association, it is a way for us to write down as many thoughts, feelings, and associations with a particular destination. Here is an example that has been generated ahead of time. (Go through the example quickly to show how one association can branch off in a variety of ways, show how the mindmap captures thoughts as well as feelings, how both positives and negatives can emerge, and how symbols or drawings can be used instead of words).
- Work with the group to get mind mapping thoughts on an easel or board.
- Review branches for Canada first (listen for patterns/repeats).
- What is the one branch that stands out for you?
 - Understand:
 - Importance
 - Significance
 - Meaning
 - Discuss countries strengths and weaknesses and overall image.

REPEAT FOR OTHER COMPETING COUNTRIES

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5. Canada's Current Image (15 min)

The main objective is to understand current perceptions of Canada—strengths and barriers

- Let's talk more specifically about the appeals of Canada.
 - What would be the main reasons to go?
 - What does Canada offer that appeals to people like yourself?
 - How do you see a typical day on a Canadian vacation?
 - What specific activities would you like to participate in?
 - What specific things would you like to see?
- Now let's talk about the negative side.
 - Why do so many people have Canada on their dream trip list, but never get around to going?
 - What are all the possible reasons for holding back/putting the decision off?
 - Are they concerned about not enough to do? Enough to see?
 - Or is it the stronger appeal of other destinations?
 - If so, what does Canada lack that alternatives have?

6. Picture Sort (10 min)

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

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



European Discussion Guide – Recent Visitors

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7. Creating The Ideal Trip (15 min)

- I have some brochures on vacationing in Canada.
- I'd like each of you to work with this material and create an ideal vacation experience.
- Use the pictures that we previously looked at and the brochures as references and write down the details for your ideal trip on the paper provided
 - We need to know specifically where in Canada you would travel
 - In what season
 - For how long you would be away
 - What activities you would do in each place—whether active or simply sightseeing
 - Whether you would want to be involved in any hobbies or special interests you have personally
 - What you expect to be the most memorable highlights of the trip—especially stories that you would tell when you return home
- Summarize:
 - What types of trips are most appealing?
 - Have your impressions of a vacation in Canada changed in any way after reviewing this material? In what way and why?
- Do these brochures address the kinds of vacations you are looking for?
 - Do they provide the kind of information needed to entice you?
 - Is there enough detail and imagery for you to create that "movie" in your head?
 - In what way are they inadequate?
 - What do they need to focus on to appeal to more people?
- Now that you have been through this detailed information, describe that your personal "movie" about a trip to Canada—what you visualize, where, how you are feeling.

8. 2010 Olympics (5 min)

- The 2010 Olympics are to be held in Vancouver, British Columbia
- Were you aware of that?
- Any interest in attending?
- Will you be watching the Olympics on television?
- How do you expect the Olympics to change or enhance people's image of Canada?



Recruiting Specs

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**Frankfurt Focus Groups
Recruiting Specifications**

- There are two different focus group traveller **types** being recruited for this study.

Type 1 **Past 3 year long-haul traveller, or planning to travel long-haul within the next 2 years, have never been on a vacation to Canada.**

- This person has either travelled for pleasure purposes outside of Europe, the Mediterranean and North Africa over the past 3 years or is planning to in the next 2 years.
- They have not yet traveled to Canada.
- Are not rejecters of Canada.

Type 2 **Past 3 years traveller to Canada**

- Have visited Canada on a pleasure trip in the past 3 years.

- Below is the grid for **the 6 groups**.

Group 1	
Type:	2
Gender:	Male/Female
Age:	50-69
Group 2	
Type:	2
Gender:	Male/Female
Age:	30-49
Group 3	
Type:	1
Gender:	Female
Age:	30-49
Group 4	
Type:	1
Gender:	Male
Age:	30-49
Group 5	
Type:	1
Gender:	Male
Age:	50-69
Group 6	
Type:	1
Gender:	Female
Age:	50-69



Recruiting Specs

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Common Specs – Type 1

- All must be born in Germany or have lived in Germany for the past 5 years.
- Currently employed full time and above national average income earners. (FOR GROUPS WITH AGED 50-69, MAXIMUM HALF PER GROUP CAN BE RETIRED)
- **All have travelled outside of Europe, the Mediterranean and North Africa on a pleasure trip during the past 3 years for 4 nights or longer, or are seriously planning to do so within the next 2 years.**
 - Gather a mix of destinations that include the U.S., Australia/New Zealand, Asia, etc.
- All must be very interested in visiting Canada in the next 3 years—via:
 - **An open-ended question:** ask respondents what destinations are they likely to visit on a pleasure trip outside of Germany in the next 3 years.
 - Canada must be mentioned voluntarily as a destination they are very likely to visit on a pleasure trip
 - **Ask if trip to Canada would be mainly to visit friends or relatives.** If so, limit to maximum 3 per group.
- **None** have actually taken a pleasure trip to Canada in the past.
- All must be the key decision makers within the household in choosing foreign pleasure destinations or share the responsibility equally with their partner.
- All must be personally involved with booking pleasure trips.
- Recruit 8 for 6 to show.

3

Common Specs – Type 2

- All must be born in Germany or have lived in Germany for the past 5 years.
- Currently employed full time (females can be part time or homemakers). (FOR GROUPS WITH AGED 50-69, MAXIMUM HALF PER GROUP CAN BE RETIRED)
- Household income must be above national average.
- **Have travelled to Canada within the past 3 years for 4 nights or longer for a pleasure trip.**
- **Primary motivator of at least one of those trip(s) to Canada was pleasure, not just to visit friends or relatives.**
- All must be the key decision makers within the household in choosing foreign pleasure destinations or share the responsibility equally with their partner.
- All must be personally involved with booking pleasure trips.
- Recruit 8 for 6 to show.

4



European Forums

October 1, 2007, 2007
 T703-07

European Forums

A. Past Visitors

<u>Day 1</u>	<u>Mine Knowledge</u> <ul style="list-style-type: none"> ♦ Provide exact details of your itinerary in the last trip to Canada. ♦ What specific elements made it such an enjoyable trip? <ul style="list-style-type: none"> ♦ Lots of detail –e.g. at this hotel we did this, here we met these people, talked with locals, etc.
<u>Day 2</u>	<u>Build on Great Experience</u> <ul style="list-style-type: none"> ♦ Read each others comments. ♦ Ask each other questions to clarify what the great experiences were and why.
<u>Day 3</u>	<u>Build Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Using that learning, let's build some great trip ideas. ♦ Also, check out specific sites for each region (to be recommended) as input.
<u>Day 4</u>	<u>Build Great Itineraries/Modules Regionally</u> <ul style="list-style-type: none"> ♦ Build more itinerary modules specifically for each region (B.C., Alberta, Manitoba, Ontario, Atlantic Canada).
<u>Day 5</u>	<u>Reaction to Our Ideas</u> <ul style="list-style-type: none"> ♦ Reaction to our modules and ideas clients want checked out.



European Forums

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European Forums

B. Prospective Visitors

<u>Day 1</u>	<u>Current Plans</u> <ul style="list-style-type: none"> ♦ What parts of Canada do you want to visit? ♦ What experiences are you looking for? Be specific on: <ul style="list-style-type: none"> - things to see and do, feel, experience.
<u>Day 2</u>	<u>B.C. Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums (to be inserted). ♦ Go to suggested websites. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in British Columbia.
<u>Day 3</u>	<u>Alberta Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums. ♦ Go to website. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in Alberta.
<u>Day 4</u>	<u>Ontario Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums. ♦ Go to website. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in Ontario.
<u>Day 5</u>	<u>Manitoba/Atlantic Canada Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums. ♦ Go to website. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in Alberta/Atlantic Canada.

