

European Segmentation Study

Alberta Summary

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Prepared for:

Alberta Tourism, Parks, Recreation & Culture

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Foreword

Methodology

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

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

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

Methodology

Phase One: Review of Existing Data

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

Information of particular relevance to the existing research included:

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

Phase Two: Long-haul traveller Focus Groups

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

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

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

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

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

Methodology

Phase Three: In-depth Interviews with the Travel Trade

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

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

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

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

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

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

Methodology

Phase Four: Consumer Quantitative Survey

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

Respondents met the following criteria:

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

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

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

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

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

Methodology

Omnibus Survey

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

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

Phase Five: Regional Products Innovation Online Forums

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

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

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

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

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

Report Layout

The report is laid out in the following sections:

Key Findings

- ◆ This section highlights the most important findings for Alberta.

Marketing Considerations

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

Section 1: The Image of Canada

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

Section 2: Alberta Trip Characteristics

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

Section 3: Ideal Trip to Alberta

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

Section 4: Product Forums

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

Section 5: The Buy Cycle Model

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

Methodology

Section 6: Breaking Down Buy Cycle Barriers

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

Section 7: The Travel Trade

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

Key Findings

Key Findings

Travel Product Review

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

U.K.

- ◆ Alberta is a favourite destination for U.K. travellers to Canada (27% of Canada bound trips spend one or more nights in the province).
- ◆ On average, they spend 6 nights in the province out of 15 in Canada. Alberta visitors more often than not travel only to Western Canada, 78% including British Columbia in their itinerary.
- ◆ Just under half (42%) are visiting friends and/or relatives, a significant travel motivator in the U.K. market. However, beyond VFR, the U.K. traveler wants not only to take in the spectacular scenery, but also experience local culture, interact with people and relax and unwind.
- ◆ As with most foreign visitors, their principle reason to visit Canada is to experience nature, but the British tend to be far less adventurous than the Germans or French. They have a desire to keep one foot solidly planted in an urban setting which provides security, a chance to socialize, cultural attractions, good food and accommodation.
- ◆ This need for a balanced vacation between urban and rural dictates how Alberta should be positioned – the opportunity to experience urban centres, their people and culture, as well as true nature in the same area.
- ◆ The majority of U.K. visitors are FIT (79%), typically with no package (52%). Consequently, they have and are likely creating their own customized itineraries.
- ◆ U.K. travellers express strong interest in 2 to 7 day modular packages that take them to interesting, less well known areas. These clearly would appeal to those with customized itineraries.
- ◆ Beyond a common itinerary of Vancouver and the Rockies (often via the Rocky Mountaineer train), high on the list of appealing “side trips” are Calgary, Drumheller, Edmonton and Alberta ranch and/or farm stays.

Key Findings

- ◆ One of the major barriers to marketing Alberta is that prospective visitors are very unaware of the province itself and the attractions beyond the National Parks and the train. However, their positive response to a wide range of available attractions, based on website perusal during the online forums, confirms significant potential.

Germany

- ◆ Alberta also attracts a solid share of German travellers destined to Canada (23%).
- ◆ In the majority of cases (79%), B.C. is also visited and in just over half, Eastern Canada (61%). Alberta captures 7 nights on average out of 20 in Canada. So for visitors that ventured as far as Alberta, the stay is a significant part of their overall trip.
- ◆ However, given that 6 in 10 trips also visited Eastern Canada, Germans need to be convinced that Western Canada and Alberta in particular is worth a unique trip to Canada—a destination that can satisfy all their needs.
- ◆ German travelers do want city experiences on their vacations, but only in a measured dose. Their prime interest is getting out into open spaces and authentic nature and experiencing small town living, as well as cultural experiences.
- ◆ Their key difference from U.K. travelers is that Germans are more adventurous when it comes to venturing into nature. They are also more interested in aboriginal attractions and other cultural experiences outside of the cities. The British need less time deep into nature and a rural environment, more time in a civilized setting with urban comforts and culture.
- ◆ B&B's, resort hotels, authentic lodges and motor homes all have significant appeal to Germans since they facilitate those desires.
- ◆ The majority of German travellers to British Columbia are FIT (90%), typically no package (65%). Consequently, most are not locked into existing packages.
- ◆ Reviewing the Alberta industry websites in the online forums, German travellers became particularly excited about Drumheller, aboriginal experiences and caravan or self drive routes that get them out into the countryside.
- ◆ As with the U.K. market, awareness of these attractions is very low, and, as discussed later, directing prospects to Alberta websites is essential.

Key Findings

France

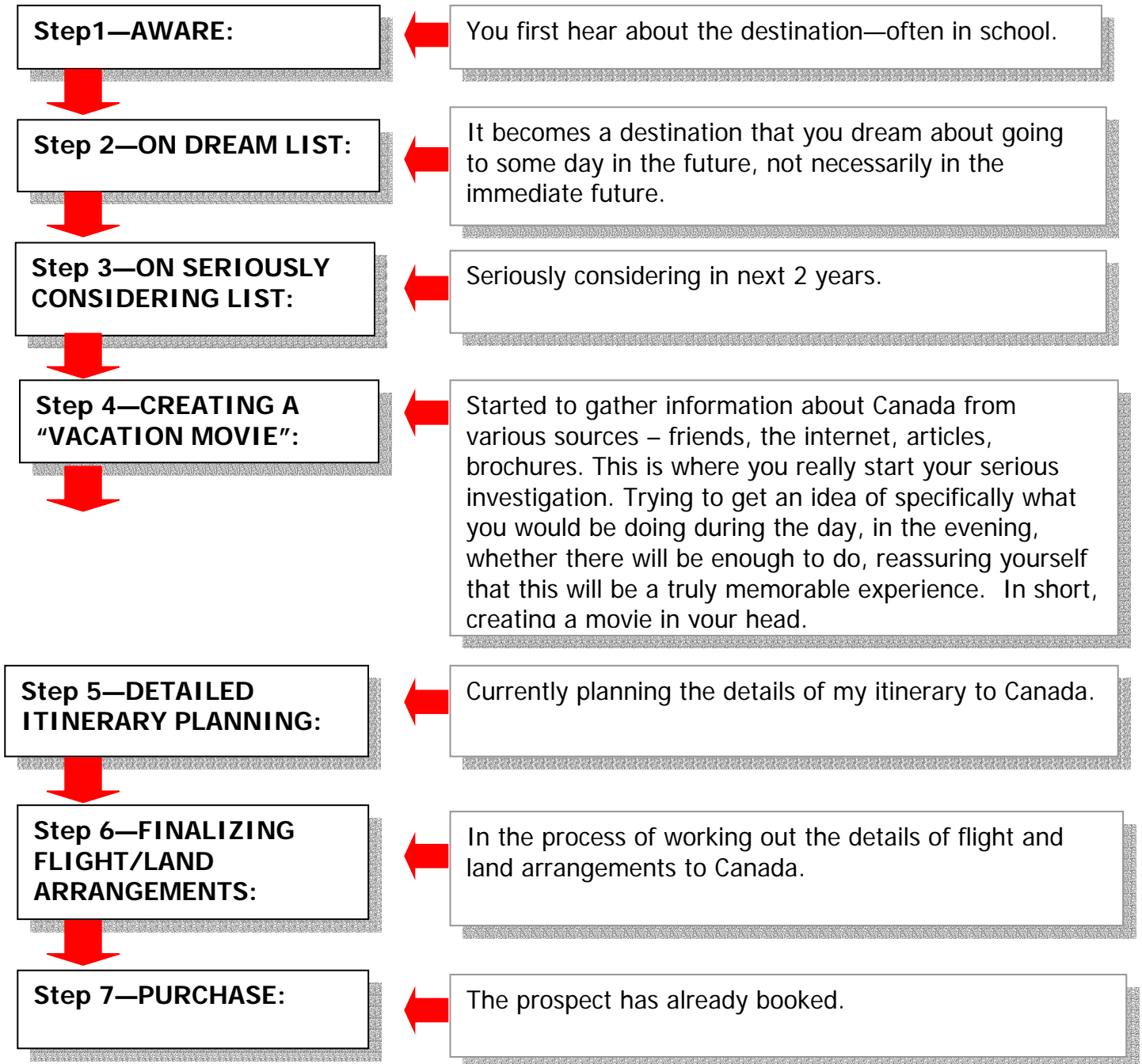
- ◆ The French market has an overwhelming preference for Quebec (81% of Canadian arrivals stays overnight in that province). Alberta tends to be a very minor destination at present—only attracting 4% of Canadian arrivals.
- ◆ On average, the French visitors to Alberta spend only 4 nights in the province out of 19 in Canada and almost invariably spend time in Eastern Canada on the trip (74%).
- ◆ The main interest of the French in Canada is to get close to the life of French Canadians – to feel their way of life which they perceive as a reflection of their own past – where French people lived close to and in harmony with nature.
- ◆ This French connection is so powerful that other provinces, including Alberta, would do well to focus on the opportunity to see first hand evidence of early French settlers or the routes of French voyageurs through the province. The French have an insatiable appetite to feel that presence.
- ◆ However, beyond the historical factor, the French want to see wonderful scenery and the beauty of nature. Interacting with local people and aboriginal attractions are also high on their list of appealing activities.

Key Findings

Breaking Down The Buy Cycle Barriers

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

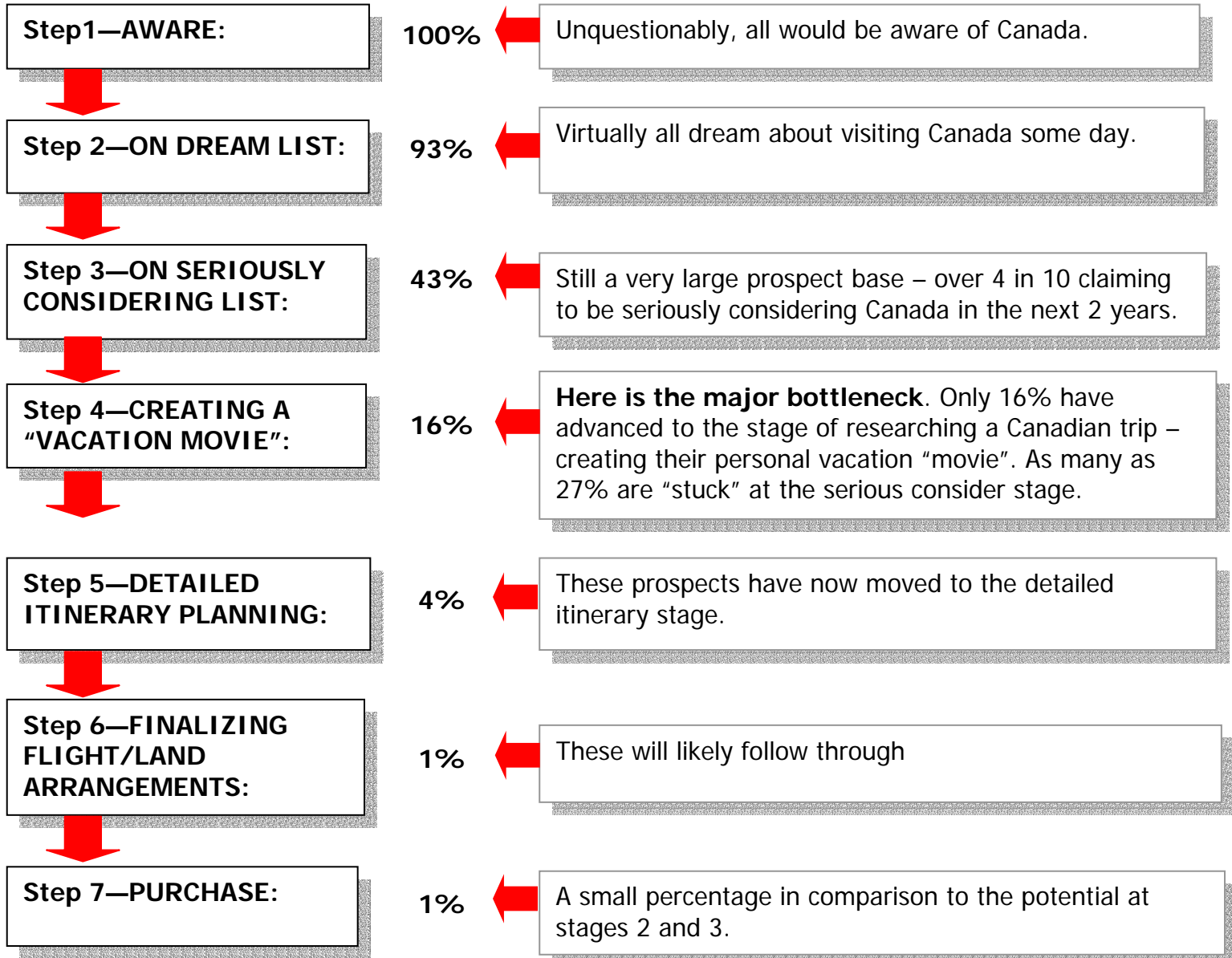
The Buy Cycle Model is a 7-step process.



Key Findings

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

European Markets



Key Findings

The Ideal Movie

The ideal movie includes very specific parameters:

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

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

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

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

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

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

Clearly, they need:

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

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

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

Key Findings

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

Seven sites provided by Alberta were rated less than ideal and could clearly use some improvement to address the needs of the European market.

Criteria:

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

Rating scale:

E – Excellent, included in main navigation or front page

A – Acceptable, fairly simple to find

P – Poor, difficult to find

N – Not available

Web Site	Criterion				
	1	2	3	4	5
Banff Lake Louise http://www.banfflakelouise.com/	E	A	A	A	N
Canadian Badlands Experience the http://www.canadianbadlands.com/	E	E	E	E	N
Edmonton.com: Travel, Tourism & Leisure - Tourism. http://www.edmonton.com/tourism/portal.asp?page=4	P	P	A	P	N
Reviews of holidays, hotels, resorts, holiday and travel packages - TripAdvisor. Available at: http://www.tripadvisor.co.uk/	N	N	P	P	E
Rocky Mountain Ski Vacations - Canadian Rockies Travel Alberta. http://www1.skicanadianrockies.com/?country=CA&state=-	P	N	P	P	N
Tourism Calgary. Available at: http://www.tourismcalgary.com/	E	A	N	N	N
Travel Alberta Canada - Wish You Were Here http://www1.travelalberta.com/en-ca/	E	A	A	A	N

Key Findings

Comments on Specific Sites

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

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

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

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

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

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

The Travel Trade

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

Marketing Considerations

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

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

U.K. – Alberta is a must see province on a trip to Western Canada. It has incredible nature in close proximity to interesting and unique Canadian cities where travelers can take part in a wide range of cultural experiences, stay in comfortable accommodation, dine and socialize with both new and old friends. Check the dinosaurs at Drumheller, consider a farm or ranch vacation for an unforgettable vacation experience.

Germany – Calgary is an ideal gateway to the Rockies for Europeans. Explore the National Parks, dinosaur park, aboriginal attractions, train travel through the mountains and follow exciting caravan/driving routes through the spectacular countryside and wide open spaces.

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

4. To entice travelers to get off the beaten path (Banff/Lake Louise/Jasper), provide itineraries and packages that encourage visitors to take in key attractions in southern Alberta, ranch and/or farm vacations as well as Calgary and Edmonton highlights.

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

Findings in Detail

Section 1: The Image of Canada

1.1 Arrivals to Alberta

The U.K. is clearly the strongest market for Alberta among the three European target countries. And, Alberta attracts as many as one in four visitors to Canada from the U.K.

However, Germany is also a very valuable source of visitors, with Alberta being equally successful in attracting German arrivals to Canada (again one in four arrivals).

France is well back in visits and share of arrivals, given very high French interest in Quebec, but as discussed later there are significant opportunities to draw French travelers to Western Canada.

	Arrivals To Canada #	Arrivals to Alberta* #	Alberta Share of Canadian Arrivals %
U.K.	842,000	224,600	26.7
France	361,000	16,000	4.4
Germany	298,000	69,800	23.4

*Overnight stays—2006 Statistics Canada

1.2 U.K. - The Appeal of Canada

- ◆ Three underlying reasons why travel from the U.K. market to Canada is well developed:
 - ◆ Predominantly English speaking
 - ◆ Reasonable close (vis-à-vis Australia, New Zealand)
 - ◆ One in four long-haul travellers (7.8 million to be precise) have close friends and relatives in Canada.

- ◆ Primary physical attraction
 - ◆ Canada's natural beauty (Rockies, Niagara Falls)

- ◆ Secondary attractions
 - ◆ Experiencing unique Canadian culture
 - ◆ Meeting friendly, hospitable people
 - ◆ Experiencing Canadian cities

1.3 U.K. – Barriers to Canada

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

1.4 U.K. – The Ideal Positioning

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

1.5 U.K. – Implications For Alberta

Not surprising, Alberta is a very popular destination for the British, given its exceptional natural beauty.

As discussed later, the Rocky Mountaineer train in particular is well marketed in the U.K. and the trip from Vancouver to Banff is receiving strong demand.

However, in marketing to the British it must be kept in mind that they are intimidated by wilderness and need to know that they can venture out safely and then easily return to the comforts of an urban setting.

What that means is that vacation product should emphasize not only natural attractions, but also the availability of resorts, good accommodation, excellent food and the opportunity to socialize with friends all close at hand.

Since the British also want unique Canadian cultural experiences, the wide range of cultural opportunities in Alberta should also be promoted in conjunction with nature and urban comforts.

The more that promotional material can capture a widely balanced vacation concept, the better in the British market.

1.6 France – The Appeal of Canada

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

1.6 France – The Appeal of Canada

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

1.7 France – Beyond Quebec

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

1.8 France – The Barriers To Canada

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

1.9 France – The Ideal Positioning

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

1.10 France – Implications For Alberta

Although the focus of the French is on Quebec, they are interested in getting beyond the province, particularly on subsequent trips.

The three most important hooks for the rest of Canada are:

1. Some type of French connection (e.g. historical)
2. The opportunity to see incredible nature
3. Cultural experiences (e.g. aboriginal)

The French connection can be following the routes of early French voyageurs and/or learning about early French settlers. These linkages to their past are very powerful draws.

One operator in Winnipeg, to the intrigue of their French clients, asked for their measurements prior to a Manitoba tour. Upon arrival at a special event commemorating early French explorers, each was given a voyageur outfit. This kind of promotion and experiential involvement is extremely powerful.

Linking those kinds of French historical encounters with nature based experiences—especially unique ones like dog sledding or snowmobiling, dinosaur park and the badlands—and/or cultural experiences like aboriginal tourism, can be very compelling.

1.11 Germany – The Appeal of Canada

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

1.12 Germany – The Barriers To Canada

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

1.13 Germany – The Ideal Positioning

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

1.14 Germany – Implications For Alberta

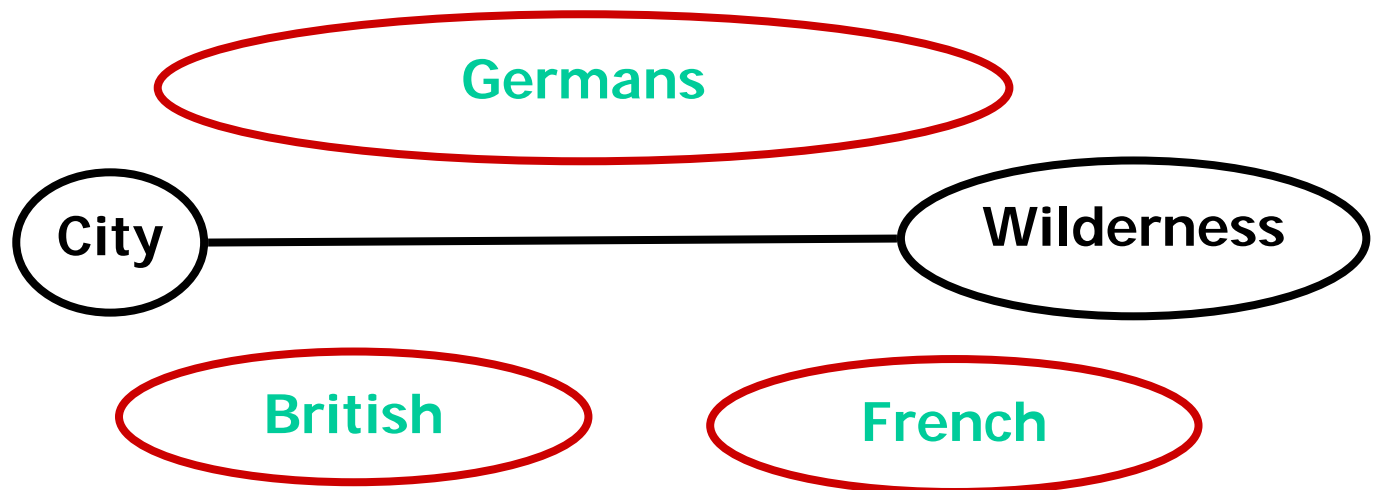
The Germans are the most attracted to Canada's authentic, unspoiled nature. They love to venture out in motorhomes, stay in lodges and really get close to the land.

Alberta can deliver on these product needs more than most provinces in Canada.

However, in spite of their adventurousness, it must be remembered that the comforts and security of an urban setting at night are also very important to this market.

1.15 Canada's Image: Summary

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



1.15 Canada's Image: Summary

1. Positioning Pitfalls to Avoid

DO's

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

DONT's

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

Section 2: Alberta Trip Characteristics

2.1 Regions Visited

For the vast majority of European visitors to Alberta, the province is almost always visited in conjunction with British Columbia.

Further, for French and Germans visiting, Eastern Canada is also very often in the itinerary.

For U.K. visitors, most fly directly to Western Canada, bi-passing Eastern Canada.

This reflects the qualitative findings which revealed the huge popularity of the B.C./Alberta combination.

	Among Past 3 Years Visitors to Alberta		
	UK	Germany	France
	(281) %	(246) %	(70) %
<u>Other Canadian Regions Visited</u>			
<u>Western Canada (net)</u>	<u>100</u>	<u>100</u>	<u>100</u>
British Columbia	(78)	(79)	(87)
Alberta	100	100	100
Saskatchewan	18	15	25
Manitoba	11	14	27
Yukon/NWT/Nunavut	26	27	36
<u>Eastern Canada (net)</u>	<u>37</u>	(61)	(74)
Ontario	34	48	64
Quebec	20	39	64
Atlantic	11	26	43
Nova Scotia	10	16	33
Newfoundland/Labrador	8	17	31
PEI	9	12	24
New Brunswick	7	10	26

Source : Quantitative Survey, Q.8b

2.2 Duration of Trip

Visitors from the U.K. and Germany spend 6 to 7 nights in Alberta, a significant proportion of the overall 15 to 20 nights in Canada.

Of particular significance is that their time in Western Canada is evenly split between B.C. and Alberta. Hence, Alberta appears to be an equally important trip component.

With French travellers visiting Alberta, they only spend 4 nights in the province (out of 19 in the country). They are inclined to spend more time in B.C.

	<u>Among Past 3 Years Visitors to Alberta</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(281) %	(246) %	(70) %
<u>Duration (Avg)</u>			
<u>Total nights on trip</u>	<u>19.7</u>	<u>27.7</u>	<u>26.5</u>
Nights in Canada	15.1	19.6	18.5
Nights in Alberta	6.4	6.8	3.7
<u>Nights in Province</u>			
British Columbia	5.7	7.0	8.2
Alberta	6.4	6.8	3.7
Manitoba	0.2	0.6	0.3
Yukon	0.2	0.6	0.2
Ontario	1.6	1.7	1.5
Quebec	0.6	1.0	3.0
Atlantic	0.5	1.2	1.1
Other	1.0	0.7	1.0
Total in Canada	16.0	19.6	26.5

Source: Quantitative Survey Q.10d

2.3 Month of Travel

The preferred season of travel to Alberta is the summer (July to September). Followed by the spring season (April to June).

	<u>Among Past 3 Years Visitors to Alberta</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(281) %	(246) %	(70) %
<u>Month of Travel</u>			
January-March	11	10	14
April-June	30	27	22
July-September	47	52	51
October-December	12	11	13

Source: Quantitative survey Q.11

2.4 FIT vs. Group

European visitors to Alberta are usually on an FIT trip, not in a group.

For U.K. and German travellers over half are travelling completely on their own with no package.

The French are more inclined to be on an FIT package.

The majority travel with their spouse, typically only 1 in 5 with children.

	<u>Among Past 3 Years Visitors to Alberta</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(281) %	(246) %	(70) %
<u>FIT vs. Group</u>			
<u>Total FIT</u>	<u>79</u>	<u>90</u>	<u>85</u>
FIT – benefit package	28	25	<u>44</u>
FIT – no package	<u>52</u>	<u>65</u>	38
<u>Total Group</u>	<u>21</u>	<u>10</u>	<u>15</u>
<u>FIT vs. Group</u>			
Immediate party only	79	90	85
Part of larger group	21	10	15
<u>Party Composition</u>			
Spouse/significant other	<u>67</u>	<u>57</u>	<u>67</u>
Friends	13	10	12
Travelled alone	14	17	13
Children	17	19	22
Parents	6	7	2
Organized group/club	4	3	2
Other relatives	8	4	9
Business associates/colleagues	1	7	3

Source: Quantitative survey Q.12, 16

2.5 Accommodation

Preferred accommodation in Canada (not necessarily during their Alberta stay) is a city hotel.

However, many U.K. and German travellers stayed in resort hotels on their trip which may be while in Alberta section in many cases.

The French have a real fondness for B&B's which provides them an opportunity to "meet real people", especially important in Quebec.

	<u>Among Past 3 Years Visitors to Alberta</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(281) %	(246) %	(70) %
<u>Type of Accommodation</u>			
Mid-priced city hotel/motel	49	32	42
Luxury city hotel	25	23	32
Home of friend or relative	27	22	27
Budget city hotel	13	21	18
Resort hotel	39	32	8
Bed and breakfast	14	18	22
Authentic wilderness lodge	5	14	5
On a cruise ship	10	2	3
Cottage/cabin	10	10	13
Camping	2	10	7
On a farm	2	4	5
Guest ranch	4	6	5
Caravan/motor home	4	15	1
Other	7	4	5

Source: Quantitative Survey Q.18

2.6 Expenditure For Trip

The average trip expenditure is higher for Germans (€7,200) and the British (£4,300), than the French (€5,400).

The British are more inclined to be satisfied with value for money on their Canadian trip, but all three markets would be likely to recommend Canada to others.

	Among Past 3 Years Visitors to Alberta		
	UK	Germany	France
	(281)	(246)	(70)
	%	%	%
<u>Trip Expenditure</u>	<u>(£)</u>	<u>(€)</u>	<u>(€)</u>
Under 2,000	26	9	23
2,000-<4,000	29	19	26
4,000-<6,000	23	28	19
6,000-<8,000	11	16	12
8,000+	11	27	20
Mean	£4,300	€7,200	€5,400
<u>Value for Money</u>			
Excellent value	44	17	29
Very good value	38	42	35
Good value	15	37	27
Fair value	3	4	8
Poor value	1	*	-
<u>Recommended to Others</u>			
Definitely will	66	73	71
Very likely	28	21	26
Somewhat likely	3	5	3
Not likely	3	1	-

* Less than 0.5%

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

2.7 Purpose of Trip – All Reasons

Spectacular nature is clearly the main reason for visiting, especially visiting parks and seeing wildlife.

Note, however, the importance of interacting with local people – especially for German and French travellers, as discussed earlier.

	Among Past 3 Years Visitors to Alberta		
	UK (281) %	Germany (246) %	France (70) %
Purpose of Trip – All Reasons			
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	82	85	84
To see new places	58	40	54
To experience local culture	42	40	44
To interact with the local people	33	46	63
To relax, unwind and decompress	40	28	31
To visit historic sites, museums, or galleries	39	34	39
To realize a long term dream	34	34	43
To visit friends and relatives	42	33	16
To visit protected areas, including nature reserve, regional or national parks	55	58	65
To view aboriginal sites and events	12	19	28
To see and watch wildlife	49	46	54
To go shopping	21	23	26
To experience big cities in another county	21	28	28
To be together as a family	22	10	12
Low rates, good deals, and discounts	15	9	8
To participate in outdoor activities	24	27	15
For entertainment and nightlife	12	9	15
To attend festivals and/or events	12	13	20
A trip that combined business with pleasure	5	13	11
Honeymoon	8	4	13
To visit a spa, health centre, or hot springs	11	9	7
To go downhill skiing or snowboarding	14	6	7
Other reason	6	3	6

Source: Quantitative Survey Q.9a

2.8 Activities Participated In – Top Ten

Nature tours, rivers and waterfalls, mountains, wildlife and glaciers are all within the top ten activities – benefits that Alberta can provide in spades.

However, Alberta visitors also want to experience small towns and take city tours while in Canada to balance their vacation.

Clearly, Alberta should reinforce its towns and cities to provide a broad vacation experience while in the province.

	Among Past 3 Years Visitors to Alberta		
	UK (281) %	Germany (246) %	France (70) %
<u>Activities Participated In – Top Ten</u>			
Viewing mountains	91	86	94
Viewing rivers or waterfalls	86	84	81
Observing wildlife in their natural environment	81	78	75
Visiting small towns	80	82	74
Visiting wilderness areas	76	81	76
Visiting places of historical interest	68	75	73
Taking city tours	61	89	89
Fine dining	61	46	79
Viewing glaciers	61	64	62
Taking nature tours	53	92	85

2.8 Activities Participated In – Also Popular

	Among Past 3 Years Visitors to Alberta		
	UK	Germany	France
	(281) %	(246) %	(70) %
<u>Activities Participated In – Also Popular</u>			
Seeing old architecture	55	51	66
Visiting museums or art galleries	54	48	62
Visiting world heritage sites	53	33	66
Visiting friends or relatives	50	47	46
Getting to know the local inhabitants	49	70	86
Seeing beautiful beaches and coastlines	49	60	62
Seeing modern architecture	44	38	71
Trekking in a nature area	44	76	70
Visiting hotspots	35	43	27
Whale watching	33	45	37
Taking a garden or flower tour	32	55	49
Taking a rail tour	32	27	36
Attending theatres, clubs or shows	31	41	38
Aboriginal cultural experiences, celebrations, and attractions	28	31	52
Attending festivals or fairs	27	35	51
Staying at a luxury resort	26	25	25
Viewing autumn leaves	25	39	34
Taking a cruise	24	10	53
Canoeing/kayaking/boating	23	36	37
Visiting a spa	23	19	24
Sunbathing or other beach activities	18	32	36
Attending professional sporting events	18	18	29
Cycling	17	21	36
Downhill skiing or snowboarding	16	17	25
Camping in a natural setting	15	24	20
Taking wine/culinary tour	14	21	31
Attending rodeos	14	24	26
Trail riding on horseback	13	26	20
Visiting casinos	12	18	24
Viewing Aurora Borealis (Northern Lights)	12	21	29
Dog sledding	10	15	29
Golfing	9	13	19
Sport fishing	7	17	32
Heli/cat skiing	7	13	21
Hunting	6	11	17
Studying English	n/a	37	48

Source: Quantitative Survey Q.19a

2.9 Trip Inspiration

The advice of friends or relatives either living in Canada or having visited there, is a very important source of inspiration – especially for British travellers.

The internet is more of a planning tool than a source of inspiration, but is still mentioned by one in four. Television travel shows and other media are also very influential.

	Among Past 3 Years Visitors to Alberta		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(281)	(246)	(70)
	%	%	%
<u>All Source of Inspiration for Trip Planning</u>			
Friend or relative	55	42	41
Television travel shows	13	25	24
The internet	18	26	27
Destination travel guide	19	26	13
Saw a film on destination	9	17	15
Travel agent/tour operator	11	8	21
Story in magazine or newspaper	10	16	13
Other television show	6	7	8
Business reasons	5	8	8
Consumer travel trade show	4	3	9
Direct mail or email advertising	5	3	4
A news story	4	5	19
Celebrity travelled there	4	4	4
<u>Close Friends/Relatives in Canada</u>			
Yes	55	35	25
No	45	65	73

Source: Quantitative Survey Q.14a, 28

2.10 Horizons

U.K. visitors plan their trip 9 months in advance and book them 5½ months out.

Germans have an even longer lead-time for planning (one year in advance) although a shorter booking horizon (4 months).

The French are the most spontaneous with even shorter horizons.

	<u>Among Past 3 Years Visitors to Alberta</u>		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(281) %	(246) %	(70) %
<u>Planning Horizons</u>			
Average # of weeks	36.3	51.2	29.0
<u>Booking Horizons</u>			
Average # of weeks	22.5	16.5	14.3

Source: Quantitative Survey Q.15a, b

2.11 How Trip Was Booked

Travel agents book just over half of the trips out of the U.K. and France, somewhat more (68%) among Germans who are generally more dependent on agents for transactions.

These levels are far below historical travel agent use and point to the shifting distribution system, discussed later.

	Among Past 3 Years Visitors to Alberta		
	UK	Germany	France
	(281)	(246)	(70)
	%	%	%
<u>How Trip Was Booked</u>			
<u>Booked through a travel agent/package provider (net)</u>	<u>56</u>	<u>68</u>	<u>59</u>
In person	27	47	37
Online	15	17	14
Via phone	17	6	10
<u>Airline (net)</u>	<u>41</u>	<u>27</u>	<u>41</u>
Via their website	36	19	31
Via phone, email or in person	7	8	11
<u>Hotel (net)</u>	<u>21</u>	<u>14</u>	<u>10</u>
Via their website	20	12	10
Via phone	5	4	-
Other online travel supplier	8	4	2
Other	6	4	1
Online Bookings (net)	78	53	57

Source: Quantitative Survey Q.15c

2.12 Traveller Profile

Visitors from the U.K. skew somewhat older than German and French visitors. One in four is retired.

However, on the whole, the age distribution reaches down the much younger levels, confirming the appeal of Canada (and Alberta) to a wide age range.

	Among Past 3 Years Visitors to Alberta		
	UK	Germany	France
	(281) %	(246) %	(70) %
<u>Age</u>			
18-29	16	18	28
30-39	20	30	31
40-49	15	20	24
50-59	27	15	10
60+	23	17	7
<u>Gender</u>			
Male	46	57	47
Female	54	43	53
<u>Marital Status</u>			
Married/living together/de-facto	79	68	77
Single	12	21	17
Divorced/widowed/separated	8	11	6
<u>Household Composition</u>			
Adults only	70	64	50
With children < 18	30	36	50
<u>Occupation</u>			
Total employed	61	73	75
Senior unskilled manual worker	2	3	1
Skilled manual worker	7	8	4
Supervisory or clerical/junior managerial/professional/administrative	17	19	16
Intermediate managerial / professional /administrative	18	11	29
Higher managerial / professional/ administrative	10	11	15
Self employed	5	16	9
Employed part time	3	6	2
Student	5	6	7
Housewife/husband	5	3	3
Retired/semi-retired	25	13	8
Other	1	4	8

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

Section 3: Ideal Trip To Alberta

3.1 Ideal Trip to Alberta

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

Note that the preferred season of travel is the summer.

The typical trip would last 15 to 18 nights in Canada.

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Ideal Next Trip</u>			
<u>Season</u>			
January-March	10	4	10
April-June	28	25	23
July-September	48	62	51
October-December	13	9	17
<u>Duration</u>			
# of nights (avg)	15.4	18.1	14.9

Source: Quantitative Survey Q.25

3.2 Provinces Likely to Visit

In addition to Alberta, B.C. is invariably included on the itinerary wish list, with Ontario and/or Quebec as well as the U.S. high on the inclusion list as well.

Without doubt, prospects for Alberta would rarely want to visit the province exclusively, especially first time visitors. This means that package design and FIT marketing should treat the province as part of a larger Canada destination journey—or at least in combination with B.C.

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Provinces Likely to Visit</u>			
B.C.	76	75	72
Alberta	100	100	100
Saskatchewan	17	20	35
Manitoba	13	19	32
Yukon	16	31	33
North West Territories	14	24	38
Nunavut	9	13	27
Ontario	57	61	66
Quebec	43	54	79
Nova Scotia	21	14	37
Newfoundland and Labrador	19	27	46
PEI	14	16	35
New Brunswick	12	12	32
<u>Would Also Visit Overnight or Longer</u>			
USA	48	54	47
Other countries	12	18	8
Canada only	48	39	50

Source: Quantitative Survey Q.25

3.3 Type of Tour

The preferred trip would be FIT. However, about half would like to be on a package—either FIT or group.

Typically, if a destination is relatively unfamiliar, travelers favour packages over going it alone.

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Type of Tour</u>			
<u>Group Tour</u>	<u>17</u>	<u>20</u>	<u>23</u>
Prefer: All days organized	9	11	15
Many free days	8	8	9
<u>FIT (non-group)</u>	<u>83</u>	<u>81</u>	<u>77</u>
Prefer: Package	30	29	36
Non-Package	53	51	40

Source: Quantitative Survey Q.25

3.4 Transportation

Rail travel is highly interesting to prospective Alberta visitors. Hence, the tremendous popularity of the Rocky Mountaineer train—especially in the U.K. as the focus groups confirmed.

A rental car is also high on the priority list for the majority, implying a desire for freedom and flexibility.

As many as 41% of prospective German travelers like the idea of a motor home. This form of travel/accommodation provides them with a sense that they can get close to the ground, immersing themselves both in nature and in the Canadian way of life at the grassroots level.

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Transportation Between Centres</u>			
Rental car	62	80	80
Air	74	68	76
Rail	74	59	65
Motor coach	38	42	57
Private car	21	20	28
Motor home/camper	24	41	20

Source: Quantitative Survey Q.25

3.5 Accommodation

Canadian resorts really intrigue European travelers—especially the British.

The Germans and French respond to the opportunity to stay in an authentic wilderness cabin or lodge, on a ranch, or in a motorhome (Germans).

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Accommodation</u>			
City hotel	36	33	32
Authentic wilderness cabin or lodge	20	22	31
Bed and Breakfast	15	29	29
Lakeside resort	42	34	21
On a ranch	8	22	22
On a farm	5	2	11
Home of friend or relative	10	10	5
Seaside resort	16	25	12
Mountain resort	51	19	16
Canadian Spa	7	6	8
Coastal cruise ship	8	2	7
Ski resort	13	4	6
Caravan/motor home	6	15	3
Camping	2	2	1

Source: Quantitative Survey Q.25

3.6 Activities – Top Ten

The top ten activities on the ideal trip to Canada again include taking in natural scenery and observing wildlife, but also visiting small towns, historic sites and city tours.

Clearly, the value of a vacation is enhanced by including activities that reach beyond the nature focus.

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Activities – Top Ten</u>			
Viewing rivers or waterfalls	93	93	96
Viewing mountains	93	88	89
Visiting wilderness areas	87	87	90
Visiting small towns	83	87	89
Observing wildlife in their natural environment	81	86	91
Visiting places of historical interest	81	86	91
Visiting world heritage sites	75	70	88
Taking city tours	74	89	91
Seeing beautiful beaches and coastlines	73	82	76
Taking nature tours	72	93	93

3.6 Activities – Also Popular

	Among Those Who Would Include Alberta On Their Ideal Trip		
	<u>UK</u>	<u>Germany</u>	<u>France</u>
	(802) %	(641) %	(275) %
<u>Activities – Also Popular</u>			
Attending rodeos	36	45	50
Cycling	23	37	44
Trail riding on horseback	33	40	44
Study English	n/a	52	41
Visiting friends or relatives	33	27	30
Sports fishing	11	15	31
Downhill skiing or snowboarding	24	18	33
Heli/cat skiing	14	15	27
Visiting casinos	15	18	21
Golfing	11	12	18
Hunting	8	11	12
Experiencing French Canadian culture and cuisine	72	79	91
Getting to know the local inhabitants	72	82	92
Seeing old architecture	70	69	78
Whale watching	69	70	80
Visiting museums or art galleries	66	62	64
Viewing Aurora Borealis (Northern Lights)	65	65	82
Taking a rail tour	64	59	53
Attending festivals or fairs	56	62	64
Trekking in a nature area	55	83	83
Seeing modern architecture	53	57	65
Attending theatres, clubs or shows	52	49	47
Aboriginal cultural experiences, celebrations, and attractions	51	77	89
Viewing autumn leaves	50	61	79
Taking a wine/culinary tour	45	37	64
Taking a cruise	39	21	49
Visiting a spa	38	34	47
Taking a garden or flower tour	34	69	65
Canoeing/kayaking/boating	30	47	56
Dog sledding	29	47	83
Snowmobiling	28	42	67

Source: Quantitative Survey Q.25

Section 4: Product Development Forums

4.1 Introduction – Online Product Development Forums

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

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

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

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

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

4.2 General British Product Discussion

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

On Itineraries and Location

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

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

A route master map would be useful.

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

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

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

4.2 General British Product Discussion

The deployment of some type of geo-tagging system, whether it be using Google Maps Google Earth¹, PlanetEye (planeteye.com) or some similar system, would go a long way towards alleviating some of these concerns. Another solution which would also be useful would be a simple mileage chart or drop down menu with different transport options available and information links.² As one respondent noted:

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

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

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

On "Word of Mouth"

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

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

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

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

4.2 General British Product Discussion

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

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

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

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

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

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

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

4.2 General British Product Discussion

On Skiing

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

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

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

On Food

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

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

4.2 General British Product Discussion

Not pushed enough...

Many respondents feel that Canada does not push itself enough.

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

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

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

Options

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

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

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

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

4.2 General British Product Discussion

Creating Customers rather than Consumers

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

How can this be done?

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

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

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

4.3 Alberta Specifics for the UK

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

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

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

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

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

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

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

4.3 Alberta Specifics for the UK

Product Discussion

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

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

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

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

A second problem lies with the graphics in the Badlands site – it is way too “Cowboy” oriented, especially in areas where it should not be (i.e. the Natural History section). The UK has had a long history of “gentlemen explorers”, and this is part of the tradition of both Canada and Alberta, but it is not brought out (or known) to our UK respondents. “Gentlemen explorers”, such as Joseph Tyrrell, should be brought out in the natural history area.⁶

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

⁶ For a good, short (1 min) video, see <http://www.histori.ca/minutes/minute.do?id=10181>

4.3 Alberta Specifics for the UK

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

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

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

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

While the British have a tradition of vacationing on “working farms”⁷, these are, however, radically different from Albertan farms and ranches. In UK farm vacation marketing, these products are tied to “getting back to nature” and food (especially “fresh” and “organic”). Given that Canada markets “nature” in a totally different way, our marketing of farm/ranch vacations will appear more contrived; i.e. it goes against the UK cultural expectation. This can be counteracted, in part, by simple statements such as “We have a long tradition of...”, and by providing historical context.

⁷ See <http://www.cartwheel.org.uk/> for an example of how this is marketed in the UK.

4.3 Alberta Specifics for the UK

Itineraries

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

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

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

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

4.4 General French Product Discussion

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

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

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

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

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

Some particular experiences were well appreciated:

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

4.4 General French Product Discussion

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

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

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

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

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

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

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

4.4 General French Product Discussion

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

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

The same respondent went on to say that:

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

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

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

Quebec → East - (2 weeks or 3)

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

Guided would include:

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

Transfer to Gaspé (2-4 days)

- Percé Rock, Bonaventure

- Mont Albert

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

Return via Quebec City to Montreal

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

4.4 General French Product Discussion

Quebec → West - (2 weeks or 3)

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

Transfer to Ottawa/Hull (3-4 days)

- River Rouge (rafting) en route

- Museums

- Gatineau Park

Transfer to Toronto (3-4 days)

- CN Tower

Options:

- excursion to Grande River

- Niagara-on-the-Lake

- Toronto Islands, sailing

- Bruce Trail, hiking

Transfer to Niagara Falls (2 days)

Options for "more than just looking at it"

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

Return via boat through 1000 islands

Back to Montreal

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

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

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

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

4.5 Alberta Specifics for France

Respondents sometimes combined a few days in Alberta with a longer stay in BC. (See previous section). Yet the kinds of things they expected to see and do in Alberta made it clear that a longer stay in this province could definitely be attractive. As with any part of English Canada, it goes without saying that even a longer stay in Alberta might well be preceded or followed by a stopover of a few days in Quebec.

For these French tourists, "Alberta" does not mean much. What is much more impressive is The Rockies. This grips their imagination. The Rockies, the wild life associated with them and the activities that could be practiced there add up to a formidable package. This is a kind of extreme extension of what they already know about or have in their minds in Quebec. Here all the wide open spaces and the opportunity to do and see things in the wilderness, just as in Quebec, but on a grander scale, with majestic, unexpected scenery.

Focussing on the Rockies, or on "the West" as a general area leads to a blurring of the boundary between BC and Alberta or even regarding it as irrelevant.

Note that although Banff and Jasper tended to dominate the positive responses to the websites that they visited, the French were also very impressed by the tourist opportunities around Drumheller. These came as a surprise as well as something unique to Canada and possibly the world.

4.5 Alberta Specifics for France

Below are the places, points of interest and activities that incited the respondents to want to visit Alberta:

Places	Attractions	Routes towards→
Calgary	Olympic Sites	Starting/finishing point for visiting Banff; or for The Badlands
Edmonton	West Edmonton Mall	Lac La Biche Sir. W. Ch. National Park Ellen Island National Park Athabasca Glacier
Banff	Hot Springs Funicular Sports, walking tours Lake Louise	
Jasper	National Park Mount Robson Maligne Lake	Valemount (BC) Rail connection → Rockies → Vancouver
Drumheller	Prehistoric sites Museums	

4.5 Alberta Specifics for France

There were a number of more adventurous activities mentioned by soft adventure seeking tourists:

- Helicopter rides over the Rockies and the glaciers
- Heli-skiing
- Skiing (alpine and cross-country)
- Rafting
- Kayaking
- Snowmobiles
- 4 X 4
- Horseback riding

At a less adventurous level, they wanted to be able to walk around and see hoodoos, scenery, wildlife; boat trip on lakes. The Calgary Stampede was not often mentioned: but judging from responses to BC and Quebec, horse shows, rodeos and possibly tracking could have considerable appeal. The chance of seeing the Aurora Borealis was an added attraction.

Itineraries

- a) A popular itinerary which would allow for a few days in Jasper (presumably via Edmonton airport) for:

Walking tours

Summer options: horseback tour; 4X4 tour

Winter options: ski-ing; snowshoeing; dogsled

Helicopter tour of glaciers, Mount Robson

B and B alternatives ("to meet real people") should be offered alongside a hotel. Then the tourists would go by train to Vancouver.

- b) A holiday based in Alberta would be for 2 to 3 weeks. There would be a different pattern depending on the season:

4.5 Alberta Specifics for France

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

4.6 General German Product Discussion

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

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

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

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

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

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

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

4.6 General German Product Discussion

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.⁸

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.

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

4.6 General German Product Discussion

On Skiing

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

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

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

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

On guided tours

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

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

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

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

4.6 General German Product Discussion

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

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

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

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

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

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

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

4.7 Alberta Specifics for Germany

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 many 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."

4.7 Alberta Specifics for Germany

"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 Aborigines, 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 Aborigines 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.¹⁰

¹⁰ 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>

4.7 Alberta Specifics for Germany

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

Section 5: The Buy Cycle Model

5.1 The Buy Cycle Model

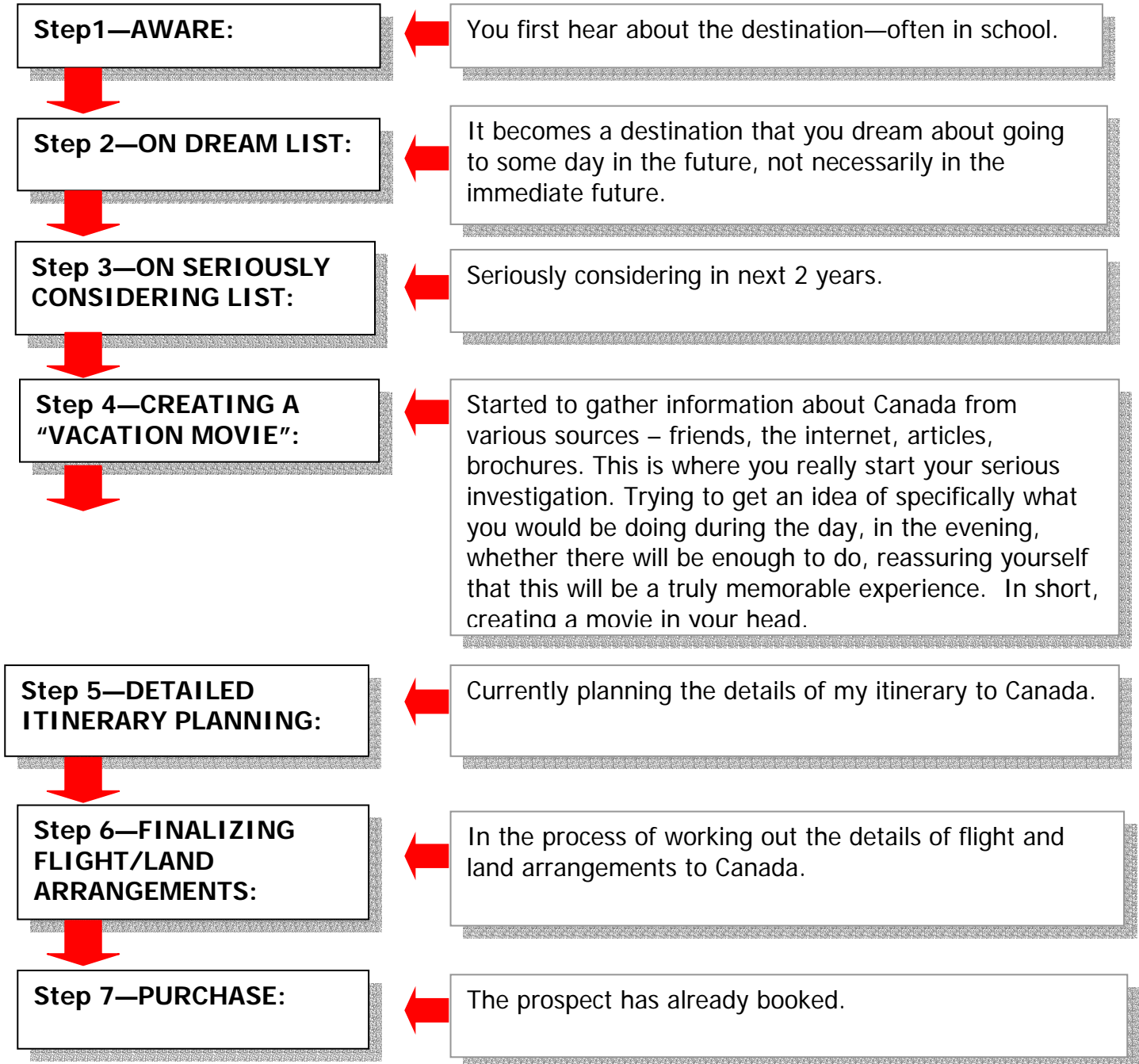
A) HOW IT WORKS

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

5.1 The Buy Cycle Model

A) HOW IT WORKS

- The model is described below:



5.1 The Buy Cycle Model

B) BUY CYCLE INFLUENCERS - GENERAL

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

Step 1 – First Aware

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

Step 2 – Getting on the Dream List

U.K.

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

Germany

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

5.1 The Buy Cycle Model

France

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

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

5.1 The Buy Cycle Model

Step 3 – Getting on the Serious Consider List

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

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

5.1 The Buy Cycle Model

Step 4 – Creating a Detailed “Movie”

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

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

5.1 The Buy Cycle Model

Step 5 –Detailed Itinerary Planning

U.K.

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

Germany

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

France

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

5.1 The Buy Cycle Model

Step 6 – Finalizing Flight/Land Arrangements

U.K.

- Often on the net, but many use agents.

Germany

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

France

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

Step 7 – Purchased

- The trip is now sold.

5.1 The Buy Cycle Model

C) BUY CYCLE INFLUENCERS - CANADA

- The process is fundamentally similar for Canada.

Step 1 – First Aware

- Typically learned about Canada in school.

Step 2 – Getting on the Dream List

U.K.

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

Germany

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

5.1 The Buy Cycle Model

France

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

Step 3 – Getting on the Serious Consider List

U.K.

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

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

5.1 The Buy Cycle Model

Germany

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

France

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

5.1 The Buy Cycle Model

Step 4 – Creating a Detailed “Movie”

U.K.

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

Germany

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

5.1 The Buy Cycle Model

France

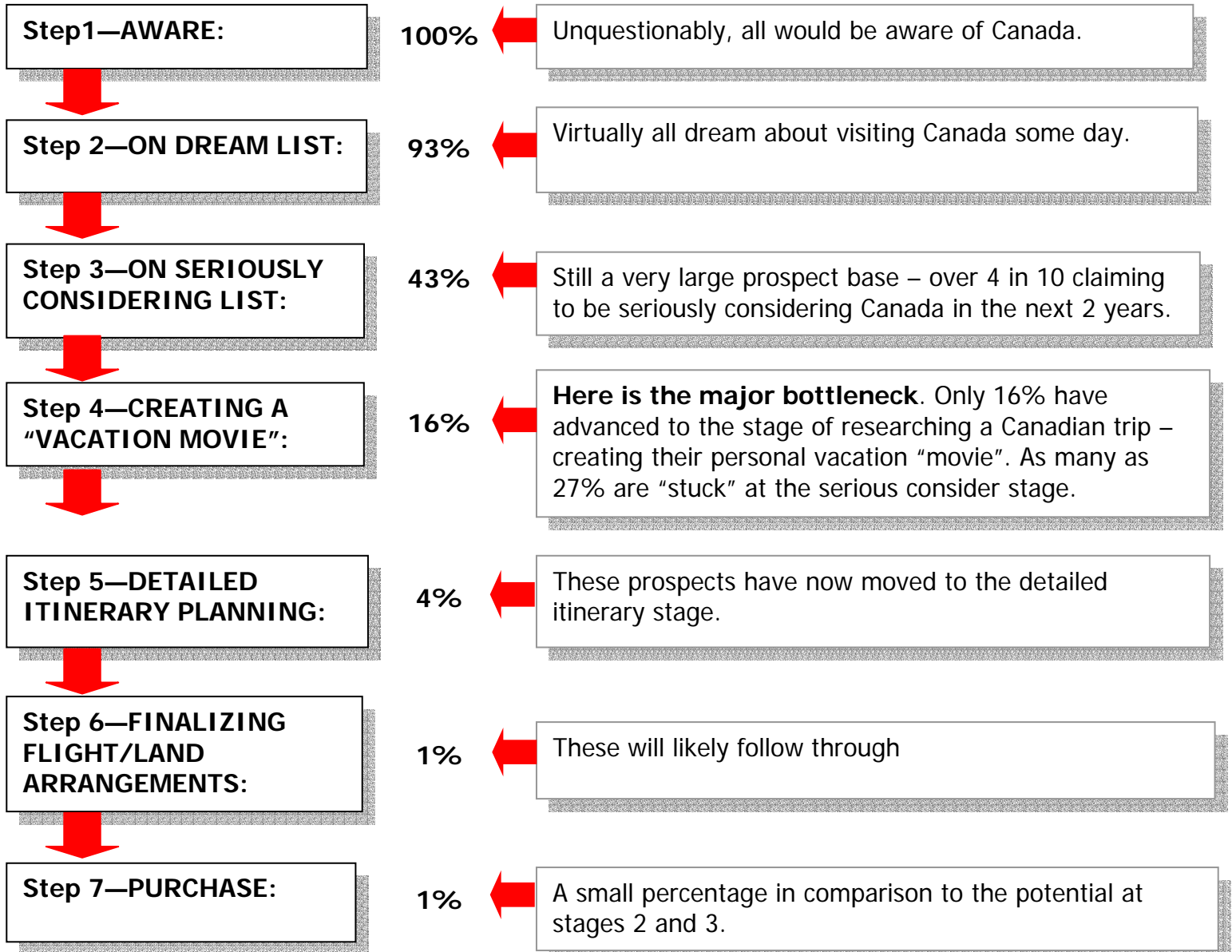
- *“Went to agency for tour information”*
- *“Guide du Boutard”*
- *“Michelin guide”*
- *“Looked at a map”*
- *“Search the net – click on pictures”*
- *“Read blogs”*
- *“Read novels on Canada”*
- *“Asked people who had been there”*

5.1 The Buy Cycle Model

D) BOTTLENECKS AND BARRIERS – CANADA

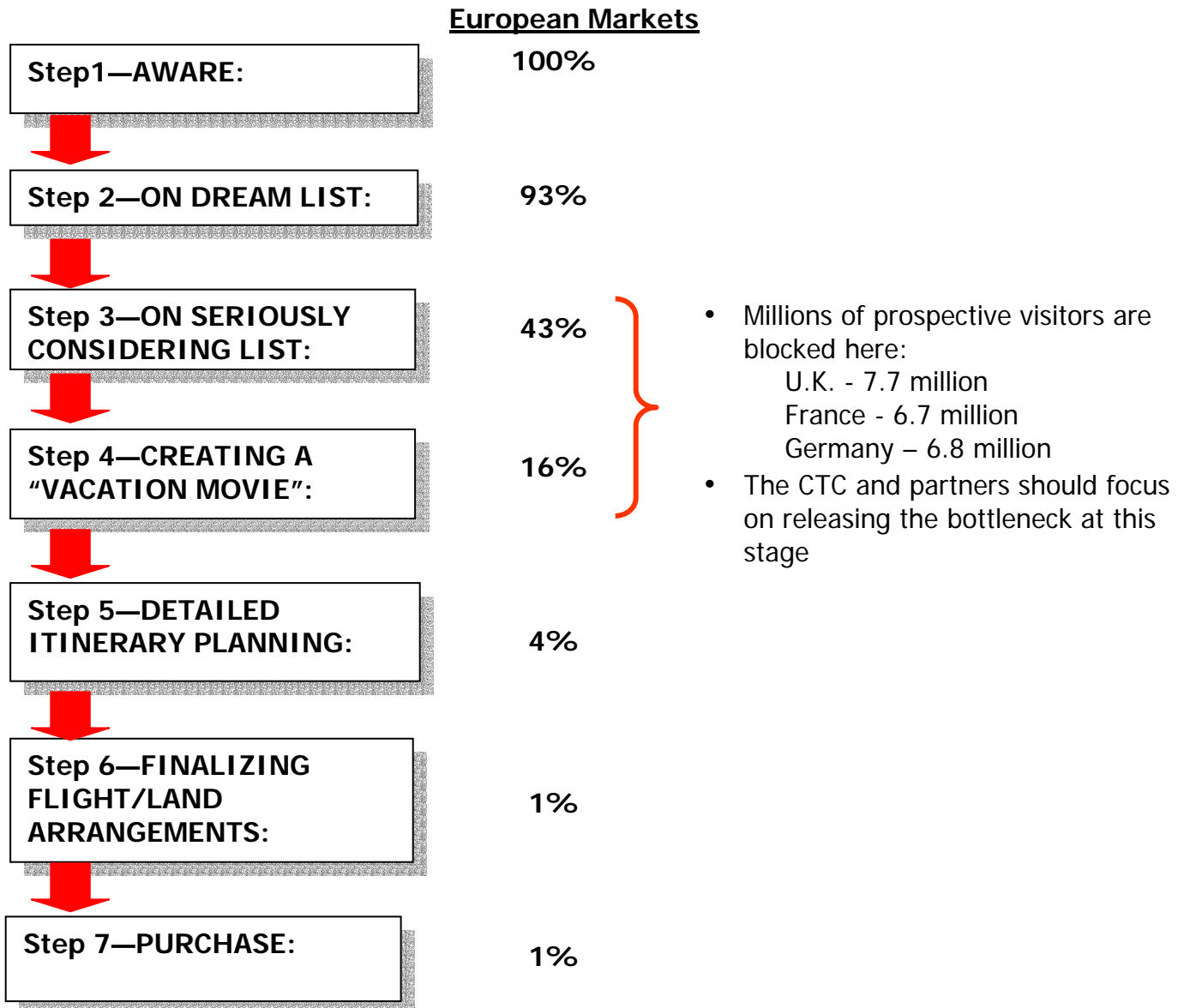
- The chart below illustrates how far the long-haul travel market has advanced along the Buy Cycle path for a trip to Canada.

European Markets



5.1 The Buy Cycle Model

E) PROJECTED MARKET SIZE



Section 6: Breaking Down Buy Cycle Barriers

6.1 The Components of The Ideal Movie

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

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

6.2 Where Do Travellers Go To Build That Movie?

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

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

6.3 How Can Websites Be Enhanced?

Most official sites appear built for the North American market.

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

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

They need:

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

6.4 Provincial/Territory Website Evaluation

Introduction

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

Background Learning From Forums

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

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

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

6.4 Provincial/Territory Website Evaluation

Making the Dream Vacation a Real Vacation.

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

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

Specific Web Sites

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

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

Website Ratings

Criteria:

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

6.4 Provincial/Territory Website Evaluation

Rating scale:

E – Excellent, included in main navigation or front page

A – Acceptable, fairly simple to find

P – Poor, difficult to find

N – not available

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

6.4 Provincial/Territory Website Evaluation

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

6.4 Provincial/Territory Website Evaluation

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

Comments On Specific Sites

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

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

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

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

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

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

6.4 Provincial/Territory Website Evaluation

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

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

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

This site did not really have any tourist information.

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

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

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

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

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

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

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

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

NB : Navigation links do not show properly in Firefox.

6.4 Provincial/Territory Website Evaluation

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

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

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

6.5 Summary

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

As can be seen from the ratings, many of the Alberta websites are not ideal for European visitors.

Travellers from these countries have little idea of distances, where attractions are located relative to better known landmarks or even the province of Alberta itself.

More itinerary ideas, especially those which draw the FIT traveller throughout Alberta, away from the icons in or near the Rockies, and maps that provide perspective are essential.

6.6 Campaign Needed To Drive Prospects to the Websites

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

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

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

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

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

6.7 Influential Media

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

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

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

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

Section 7: The Travel Trade

7.1 The Evolution of The Travel Trade

Fact

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

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

Implications

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

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

Fact

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

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

Implications

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

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

7.1 The Evolution of The Travel Trade

Fact

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

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

Implications

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

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

7.2 New Product Must Be Brought to Market

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

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

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

Although packages still constitute a significant share of trips (48% for the U.K., 35% for German and 62% for French trips that include Alberta), the market will continue to swing more toward non-packaged FIT and, consequently, bypass the operator.

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

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

- ◆ In other words, travelers planning to visit Vancouver and then travel on to the Rockies, possibly stopping in or exiting through Calgary (or visa versa), should be provided with add-on itineraries that include Drumheller, the ranches and farms of the foothills, Edmonton and other highlights of the province beyond the National Parks.

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