

RESEARCH

2002 GERMANY ADVERTISING EVALUATION STUDY

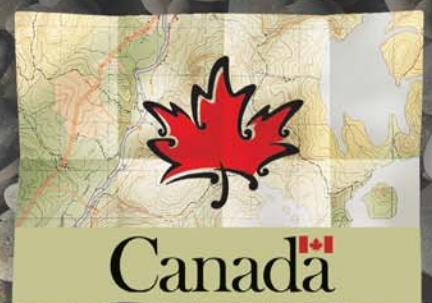
Evaluation
Report
2003-2

Discover our true nature

CANADIAN
TOURISM
COMMISSION



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CANADIENNE
DU TOURISME



2002 Germany Advertising Evaluation Study

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Executive Summary

The Canadian Tourism Commission (CTC), in conjunction with several partners, launched a number of advertising initiatives in Germany in 2002/03. These included a major new television campaign, supported by a national magazine initiative. IBM Business Consulting Services was commissioned to conduct an evaluation study to determine the effectiveness and impact of this advertising on the marketplace. Highlights of this study are presented below.

Advertising Awareness

- Immediately following the CTC's television campaign, unaided awareness of travel-related advertising for Canada hit the 5 per cent mark (6% among the targeted age group). This is far higher than in the 2001 study, when unaided awareness among the target audience stood at only 1 per cent following the advertising.
- At 5 per cent, unaided advertising awareness for Canada was on par with that of its key long-haul competitors, with Africa, Australia, the Caribbean, Asia and the U.S. all in the same range (i.e., 5% to 8%). These results should be taken in context of the fact that the overwhelming majority of long-haul travellers (75%) were not aware of any travel-related advertising whatsoever.
- When prompted (i.e., aided awareness), close to a quarter (22%) of all long-haul travellers said they had seen or heard travel-related advertising for Canada in the last two months.
- Awareness of CTC-specific advertising was very strong at 20 per cent. This represents more than 1.9 million German long-haul travellers who saw either the television or magazine advertising. The campaigns achieved particularly good penetration in the Thuringia / Saxony region, with awareness at a remarkable 34 per cent.
- "Canada" was clearly the major brand recognized within Germany, with little recollection of advertising for the individual provinces on an unaided basis.

Audience Impressions and Recall of the Advertising

- An astonishing 98 per cent of all viewers felt that the CTC television ads were visually appealing. On top of this, the advertising was felt to create interest (87%) and be informative (78%). However, the ads were felt to be lacking in uniqueness (34%), which led viewers to rate them as somewhat unmemorable (70%).
- Overall, four of the top five images recalled from the advertising for Canada were related to images of "nature," which is consistent with the imagery that dominated the CTC ads.
- There was considerably greater recall of slogans and logos in Germany than in the U.K., which may have been attributable to the magazine advertising (10% recalled the *Discover our True Nature* slogan, while 6% remembered the CTC maple leaf logo).
- When asked to recall specific destinations from the advertising for Canada, Vancouver, Toronto, British Columbia and Ontario were the top four mentions, each recalled by 10 per cent or more of all viewers.

Destination Awareness, Travel Intentions and Perceptions of Canada

- Unaided awareness of Canada as a long-haul holiday destination was 12 per cent, placing it sixth behind the U.S., Asia, Australia, Africa and the Caribbean. Awareness was far higher for “Canada” per se than for the individual provinces, which reinforces the dominance of the “Canada” brand in this market.
- Approximately 2.7 per cent or 264,000 travellers said that they were definitely or very likely to visit Canada in the next 12 months. Adding in travellers somewhat likely to visit brings the total *potential* for Canada to more than 578,000 travellers in the next year.
- When specifically asked, almost three-quarters (74%) of these prospective travellers identified Canada’s East Coast as a likely destination, followed by Ontario (67%), British Columbia (66%) and the Northwest Territories (50%).
- Key travel barriers in this market included competition from other destinations and the perceived expense of a trip to Canada (particularly for airfare). The distance and long flights were also a deterrent, which suggests that one reason for the East Coast’s popularity is its proximity. Given German long-haul travellers’ penchant for beach destinations, it is not surprising that Canada’s colder weather was also cited as a factor.
- Notably, fear of terrorism and war in Iraq were not significant travel barriers, being mentioned by only a small fraction of respondents (under 1%).
- Canada is perceived by German travellers as a place to enjoy the great outdoors (85%) and connect with nature (77%). The market also views Canada as a once-in-a-lifetime destination (78%) that offers diverse and unique things to see and do.

Impact of the CTC Advertising Campaign

- Almost 70 per cent of viewers felt that the television advertisements made them feel more positive about Canada as a vacation destination, while 63 per cent believed the ads made them more likely to vacation in Canada. The magazine ads were rated somewhat lower at 54 per cent and 56 per cent, respectively.
- Approximately 7 per cent of those who saw the CTC advertising sought additional information on travelling to Canada, representing 133,000 long-haul travellers who responded to the campaigns’ call for action. Most travellers turned to travel agents or the internet for further information on Canada.
- Close to 5 per cent of viewers took or booked a trip to Canada in the weeks following the campaign (although more than half had already planned these trips prior to seeing the advertising).
- The CTC television campaign significantly enhanced future travel intentions among those who saw it. The likelihood of visiting Canada (definitely or very likely to visit) during the next year was 8.2 per cent for advertising viewers, compared with only 1.7 per cent for non-viewers. Although awareness of Canada was also higher among those who saw the CTC ads, this difference was not significant due to the small sample of ad viewers.

1. Introduction

The Canadian Tourism Commission (CTC), in conjunction with several partners, undertook a number of advertising initiatives in Germany in 2002/2003. These included a television campaign that ran from December 26, 2002 to February 16, 2003, and a magazine campaign that launched in mid-January. The television initiative included a series of 40-second advertisements, with each ad spotlighting a different partner to the campaign. The magazine ads were also partner-oriented, with insertions in publications such as *GeoSaison*, *Mare* and *Mens Health*. Provincial partners included British Columbia, Alberta, Ontario, Atlantic Canada and the Northwest Territories. The airline partner was Air Transat, and the tour operator partner was Dertour.

The overall objectives of this year's advertising in Germany were to create awareness of the Canada brand, to promote specific partner offers, and to generate inquiries and response from the target audience. In contrast to previous years, the advertising was more tactical and focused on response rather than on general awareness building. The theme of the advertising, which positioned Canada as an exciting, trendy destination with diverse experiences, was *Aufbrechen nach Kanada* ("Go for Canada").

Being the first new television campaign to be launched in this market in over three years, the CTC recognized the importance of assessing the effectiveness and impact of the advertising on the marketplace. As a result, IBM Business Consulting Services was commissioned to conduct an advertising evaluation study in Germany, with a conversion study to come later in the year.

This report presents the key findings of the evaluation study, including advertising awareness, audience impressions and recall of the advertising, awareness, travel intentions and perceptions of Canada, the impact of the advertising campaign, and audience demographics.

Methodology

For this evaluation study, a total of 1,030 interviews were conducted with German residents between February 10 and February 23, 2003. The target population for the survey was adults aged 25 to 64, earning median or above incomes, that have either taken a long-haul pleasure trip in the past three years or intend to take one in the next two years.

Respondents were randomly selected from the general population on a nationally representative basis, with those meeting the target criteria proceeding to the survey itself. A copy of the evaluation questionnaire can be found in *Appendix I*.

The results for the advertising evaluation study are accurate to plus or minus 3.1 per cent, 19 times out of 20. The margins of error are correspondingly higher for specific sub-groups (e.g., those who saw the CTC television or magazine advertisement).

In reading the report, there are a few things to keep in mind:

- A pre-advertising wave was not conducted prior to the start of the campaign, so there is no baseline against which to measure the post-advertising wave results. This makes it difficult to assess the extent to which the advertising actually improved market awareness and interest in Canada.

-
- Unlike past evaluation studies that were focused on the general population, the survey population for this year's study was the specific target audience for the advertising campaign. Thus the overall study results are not directly comparable with previous studies.
 - The survey was conducted 4 to 6 weeks after the launch of the magazine campaign, which actually runs until the end of April. Because of this, the study does not measure the full effects of this campaign. In other words, results for the magazine advertising can be viewed as a conservative estimate of its impact.

2. Advertising Awareness

This chapter looks at awareness of advertising for Canada and its long-haul competitors in the German market.

Awareness of Advertising for Canada

Awareness of advertising can be examined in terms of both unaided (unprompted) and aided (prompted) awareness. To address *unaided awareness*, respondents were asked to name the places for which they had seen or heard any destination advertising in the last two months. As shown in *Exhibit 1*, approximately 5 per cent of German long-haul travellers recalled seeing recent destination advertising for Canada. While this may seem low at first, it is important to note that a very large proportion of the market (75% of all respondents) did not recall any travel advertising whatsoever.

Respondents were also asked if they had seen or heard any destination advertising specifically for Canada in the past two months (*aided awareness*). When prompted in this way, approximately 22 per cent of long-haul travellers indicated that they had seen advertising for Canada.

When asked specifically if they had seen the CTC television advertisements, 13 per cent responded affirmatively. Based on a population of 9.8 million long-haul travellers (aged 25 to 64, with above median incomes), this means almost 1.3 million travellers saw the CTC television advertising. Approximately 9 per cent said they definitely saw the CTC television ads, while 4 per cent think they saw them.

Approximately 8 per cent of long-haul travellers (784,000) said they saw the CTC magazine advertisements. Of these, almost 5 per cent said they definitely saw the ads, and 3 per cent said they think they saw them. As noted earlier, the CTC magazine campaign was just gearing up at the time the survey was conducted, so this is a conservative estimate of advertising awareness. The strength of these initial results, however, suggests that final awareness levels may approach that of the television advertising by the time the magazine campaign runs its full course.

Overall, 20 per cent saw either the television or magazine advertising, representing a total of more than 1.9 million German long-haul travellers who saw CTC advertising. Combined awareness of the two CTC campaigns was significantly higher in the Thuringia/Saxony region (34%), particularly when compared with regions such as Berlin (10%) and Schleswig-Holstein/Hamburg/Bremen/Lower Saxony (11%). There were no significant differences in the level of campaign recall by age group or by income category.

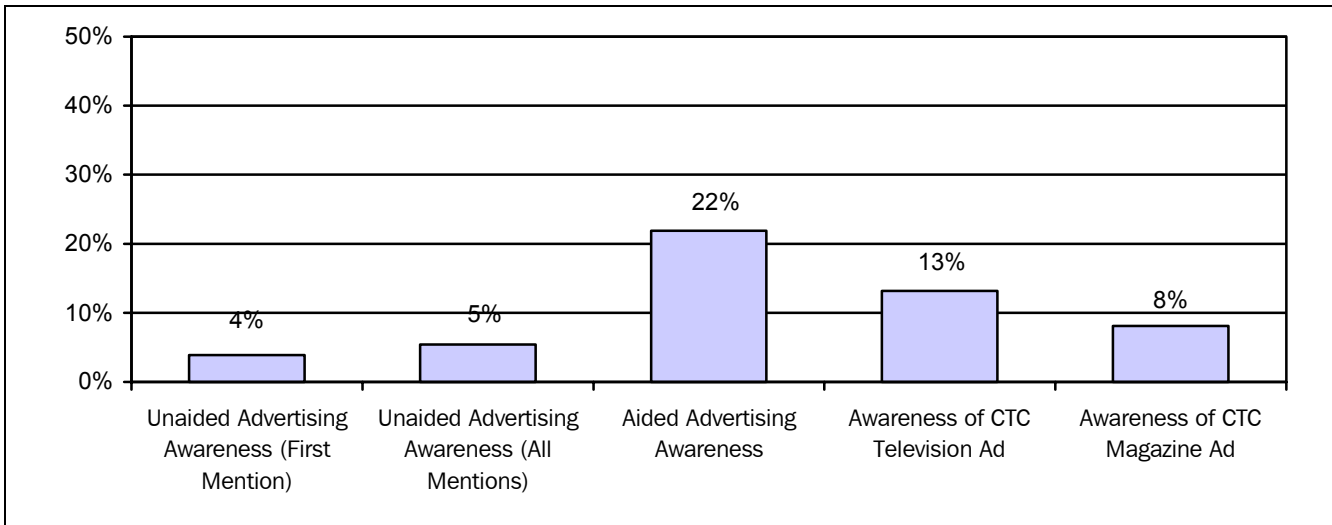


Exhibit 1 – Awareness of Travel-Related Advertising for Canada

Base: (n=1030).

In Germany, the CTC’s specific target audience consists of travellers aged 30 to 54. In total, there were 696 people in the sample meeting this age criterion. As shown in **Exhibit 2**, awareness levels among the target audience were virtually identical to that of travellers as a whole. In general, the CTC’s advertising campaign achieved fairly good penetration of the target market, with 19 per cent of those aged 30 to 54 who saw either the television or magazine advertising.

Although the target population this year is not exactly the same as the previous study, it is worth pointing out that unaided advertising awareness of Canada was significantly higher this year than in the 2001 study. In fact, at 6 per cent, unaided advertising levels were six times higher than the 1 per cent awareness seen for the target audience in 2001.

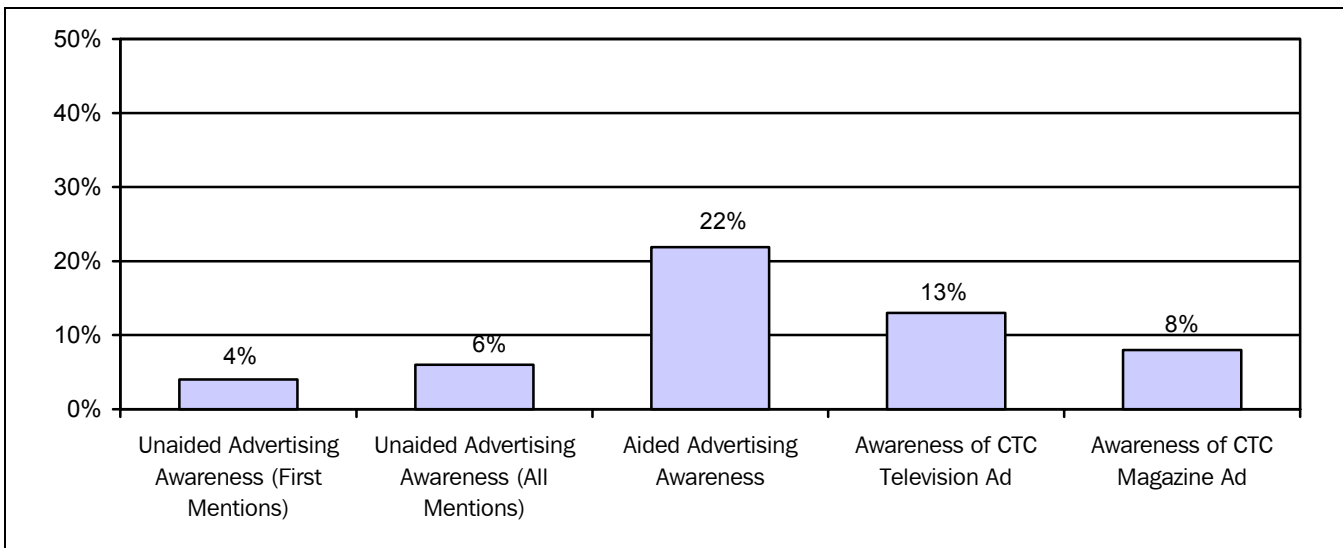


Exhibit 2 – Awareness of Travel-Related Advertising for Canada Among Target Audience

Base: Travellers aged 30-54 (n=696).

Awareness of Competitor Advertising

Exhibit 3 shows unaided advertising awareness levels for different long-haul destinations. In contrast to the U.K. market, recognition was not high for any long-haul destination. This may have been a lull period for long-haul destination advertising, and certainly the high proportion of travellers who did not recall any travel-related advertising whatsoever (75%) seems to support this.

Africa topped the list for advertising recall, being mentioned by 8 per cent of travellers, with Australia / New Zealand close behind at 6 per cent. The 5 per cent awareness level for Canada placed it on par with the Caribbean, Asia and the U.S.

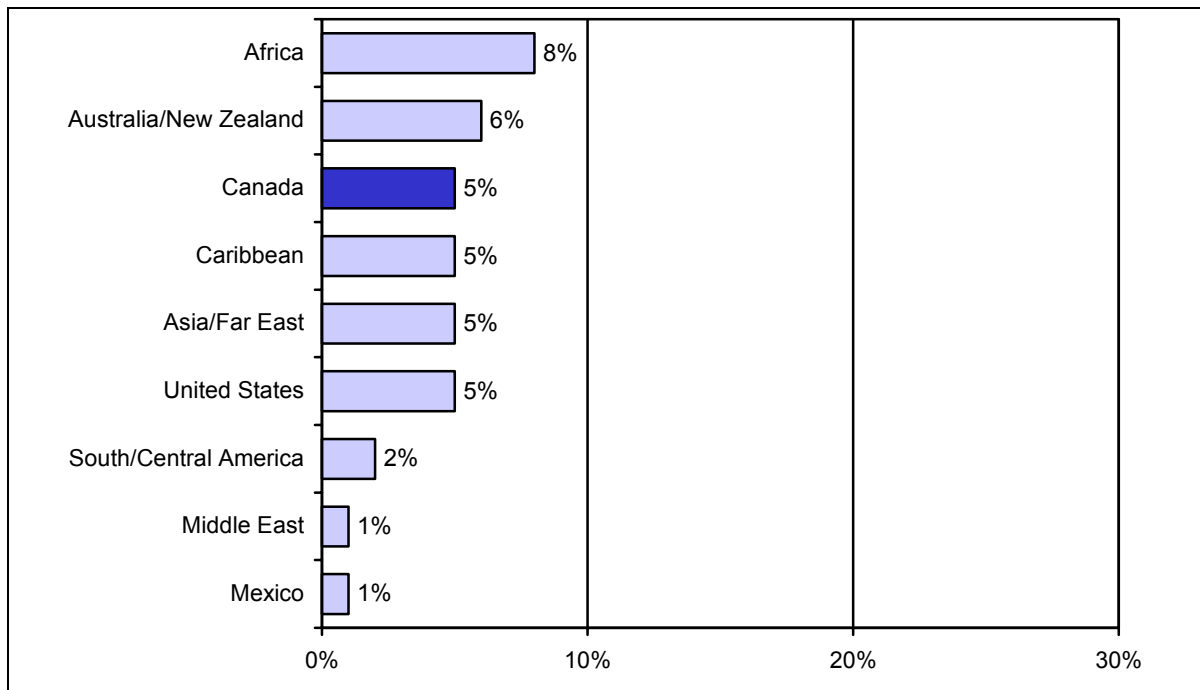


Exhibit 3 – Unaided Advertising Awareness for Long-Haul Destinations (All Mentions)
Base (n=1030).

Awareness of Advertising for Canadian Destinations

Unaided advertising awareness levels for different Canadian destinations is shown in *Exhibit 4*. Among those mentioning Canadian destinations, a general mention of “Canada” was most common (4.5%). This shows that “Canada” is the major brand recognized in Germany, with considerably lower awareness of advertising for the individual provinces.

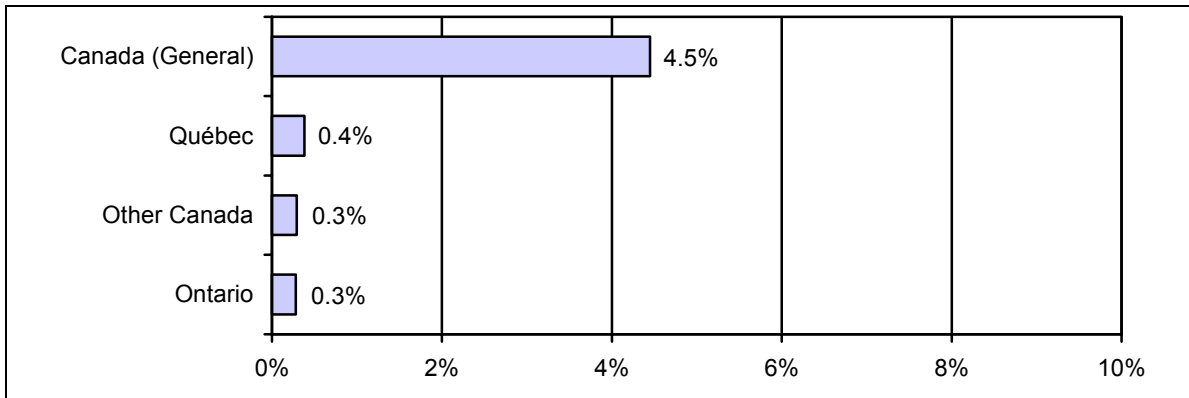


Exhibit 4 – Unaided Advertising Awareness for Canadian Destinations (All Mentions)
 Base (n=1030).

Media Recall

Travellers who were aware of advertising for Canada were asked to specify in which media they had seen or heard the advertising (see *Exhibit 5* below). Respondents were far more likely to have seen Canadian travel advertising on television (62%), than in other media sources.

Awareness of print advertising for Canada was also fairly strong, with magazine recall particularly high at 20 per cent, and newspaper ranking third at 11 per cent. As noted earlier, the CTC magazine campaign had only been running for about a month prior to the tracking study, and these results indicate a strong preliminary showing for the campaign.

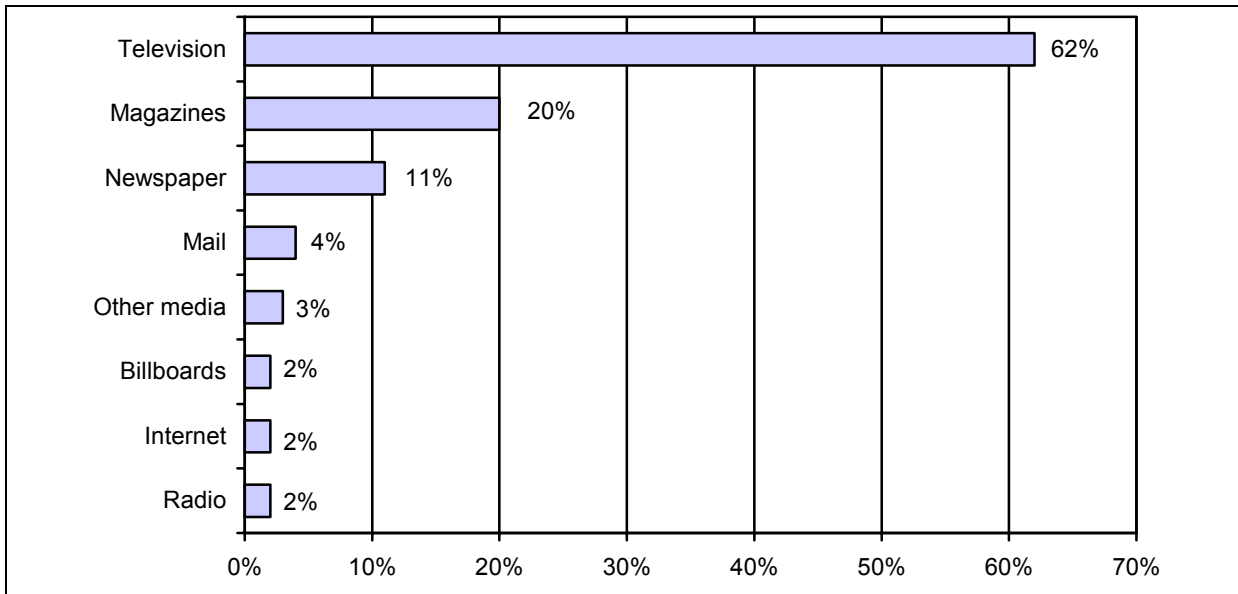


Exhibit 5 – Media in Which Advertising for Canada Was Seen or Heard

Base: Those who saw advertising for Canada (n=252).

Note: Percentages add to more than 100 per cent due to multiple responses.

3. Audience Impressions and Recall of the Advertising

This chapter examines audience impressions of the CTC television advertisements, followed by a look at the images and destinations recalled from the advertising.

Impressions of the Television Advertising

As shown in *Exhibit 6*, audience reaction to the television advertising was mixed. While the advertisements rated highly on some attributes, others did not fare so well.

On the positive side, a remarkable 98 per cent of viewers agreed that the ads were visually appealing. Clearly, viewers appreciated the many beautiful images of Canada contained in the advertising. Around 87 per cent also said the ads were interesting, while close to 80 per cent thought the ads were informative. So on top of being nice to look at, the ads successfully met the all-important objectives of informing viewers about Canada and generating destination interest.

However, the ads were generally felt to be lacking in uniqueness, which may have led viewers to feel they were somewhat unmemorable (70%). In addition, only 39 per cent of respondents indicated that the ads were better than other travel advertisements they had seen on television, which is significantly lower than in past campaigns, and also lower than the U.K. rating. Again, this impression may stem from the feeling that the advertising was not really distinctive.

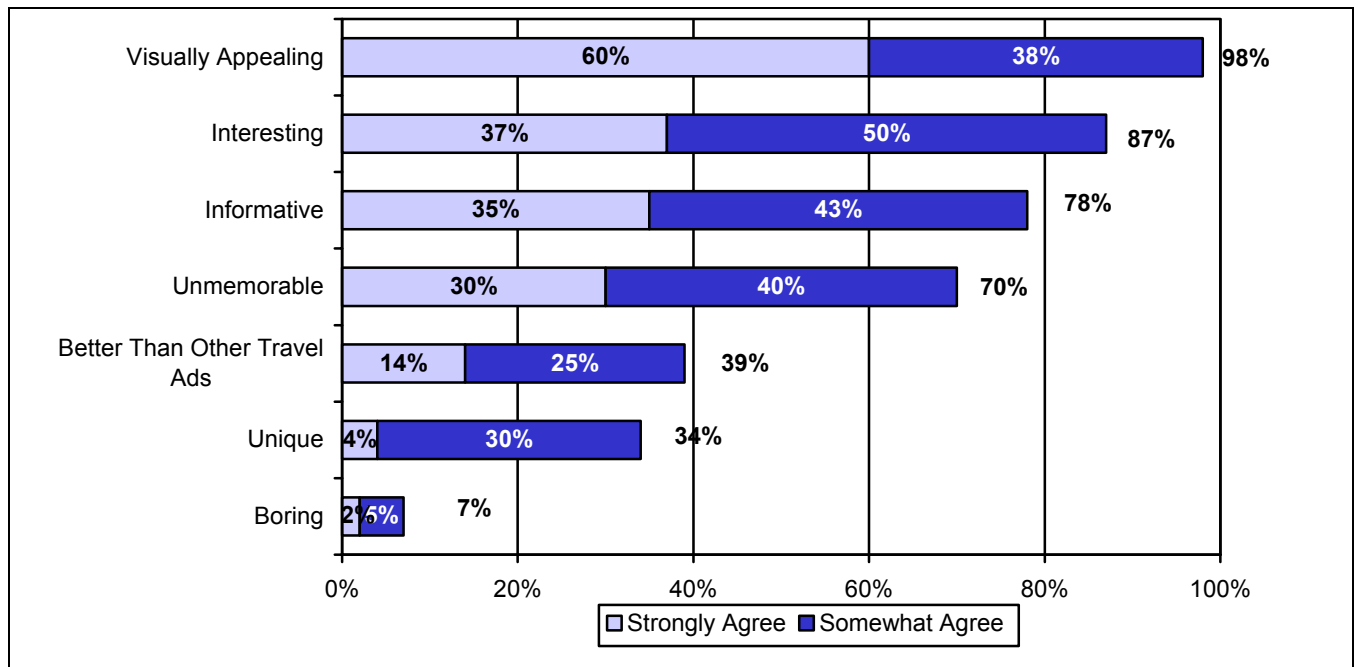


Exhibit 6 – Impressions of CTC Television Advertisements

Base: Those who saw CTC television advertisement (n=129).

Image and Destination Recall

People who saw television or magazine advertising for Canada were asked to indicate what images they remembered from the advertising. *Exhibit 7* shows the top images recalled by respondents. Over a third (35%) of viewers recalled images of lakes and rivers, and almost a quarter (22%) recalled seeing mountains. As in the U.K., the top images were all related to nature. Again, this is consistent with the CTC television and magazine advertising, both of which used extensive imagery of nature and outdoor-based activities.

There was considerably greater recall of slogans and logos in Germany than in the U.K., which may have been attributable to the magazine advertising. Notably, almost 10 per cent of those who saw advertising for Canada recalled the CTC slogan “*Discover our True Nature,*” while 6 per cent remembered seeing the CTC maple leaf logo.

While the CTC television advertising also contained urban imagery, these images were not as well remembered by viewers, with cities/skyline being the only one to make the top 10 list.

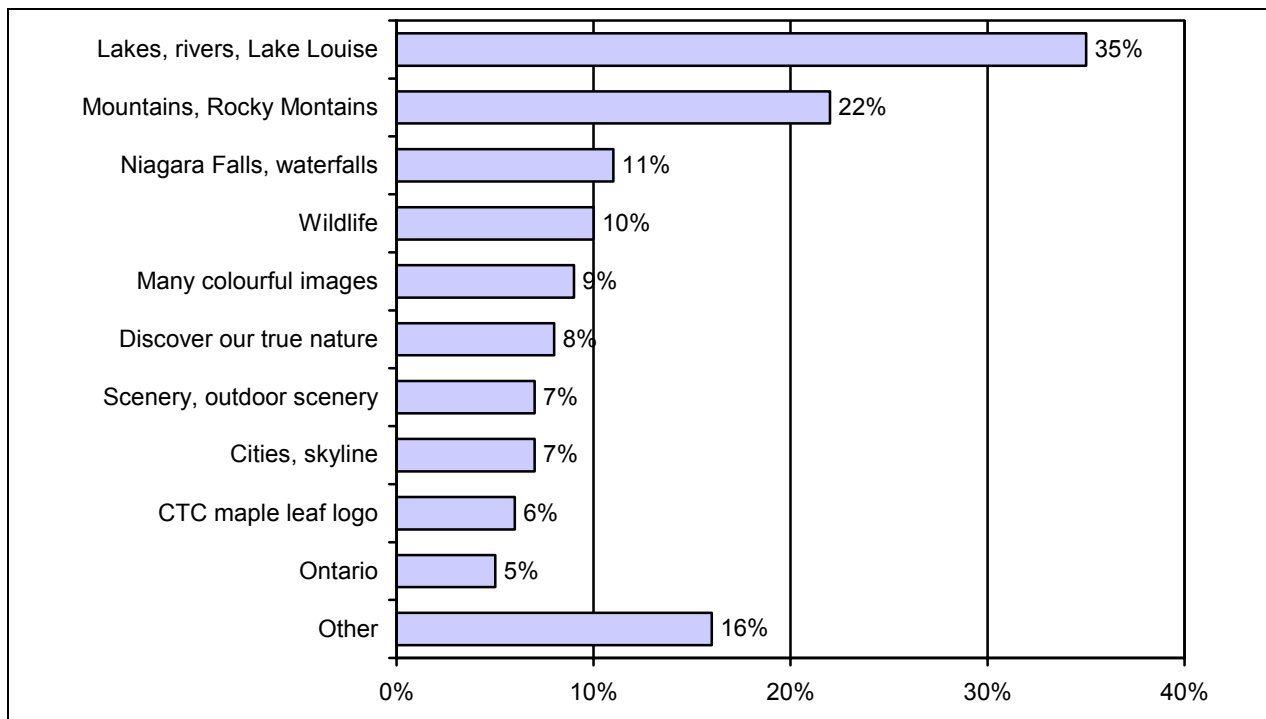


Exhibit 7 – Unaided Recall of Images from Television and Magazine Advertising for Canada

Base: Those who saw television or magazine advertising for Canada (n=200).

Note: Percentages add to more than 100 per cent due to multiple responses.

Travellers who said they saw television or magazine advertising for Canada were also asked if they remembered specific destinations from the advertising. **Exhibit 8** shows the results for destination recall.

Top-of-mind destinations from the advertising were the cities of Vancouver (12.8%) and Toronto (12.3%), followed by British Columbia (10.5%) and Ontario (9.9%), both of which were provincial partners on the campaign.

Recall for the Atlantic region was somewhat lower, with all results falling below 2 per cent.

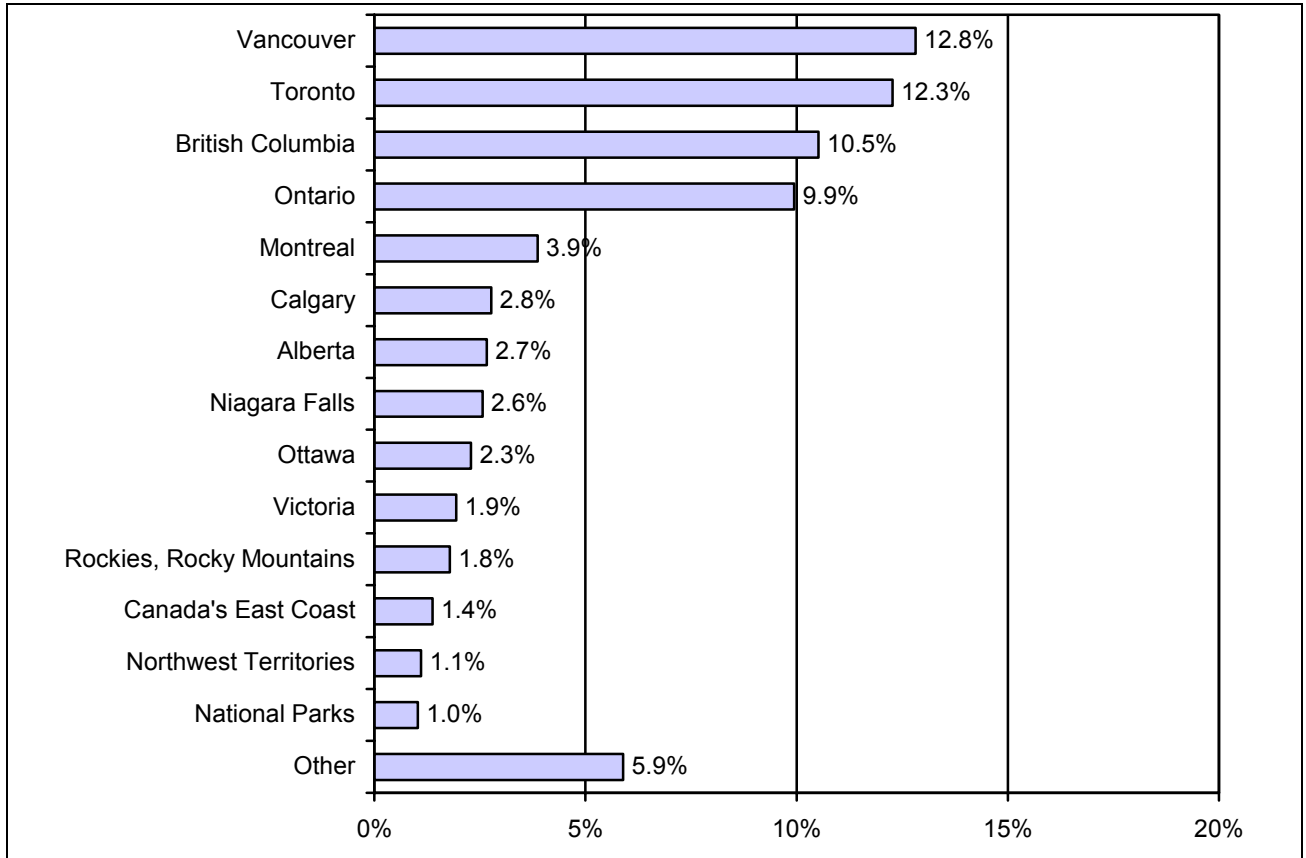


Exhibit 8 – Unaided Recall of Destinations from Television and Magazine Advertising for Canada
Base: Those who saw television or magazine advertising for Canada (n=194)

4. Awareness, Travel Intentions and Perceptions of Canada

This chapter discusses key performance indicators such as destination awareness and future travel intentions, followed by a look at perceptions of Canada in the marketplace.

Destination Awareness

Respondents were asked to name places that come to mind for a holiday trip outside of Europe and the Mediterranean. **Exhibit 9** shows the results. The U.S. was most frequently mentioned (at 35% of all respondents), which is not surprising given that it is the top long-haul vacation destination for this market. The U.S. was followed closely by Asia, Australia and Africa.

Canada was mentioned by 12 per cent of respondents, placing it sixth, behind the Caribbean. This translates into almost 1.2 million German long-haul travellers who were aware of Canada as a travel destination on a totally unprompted basis.

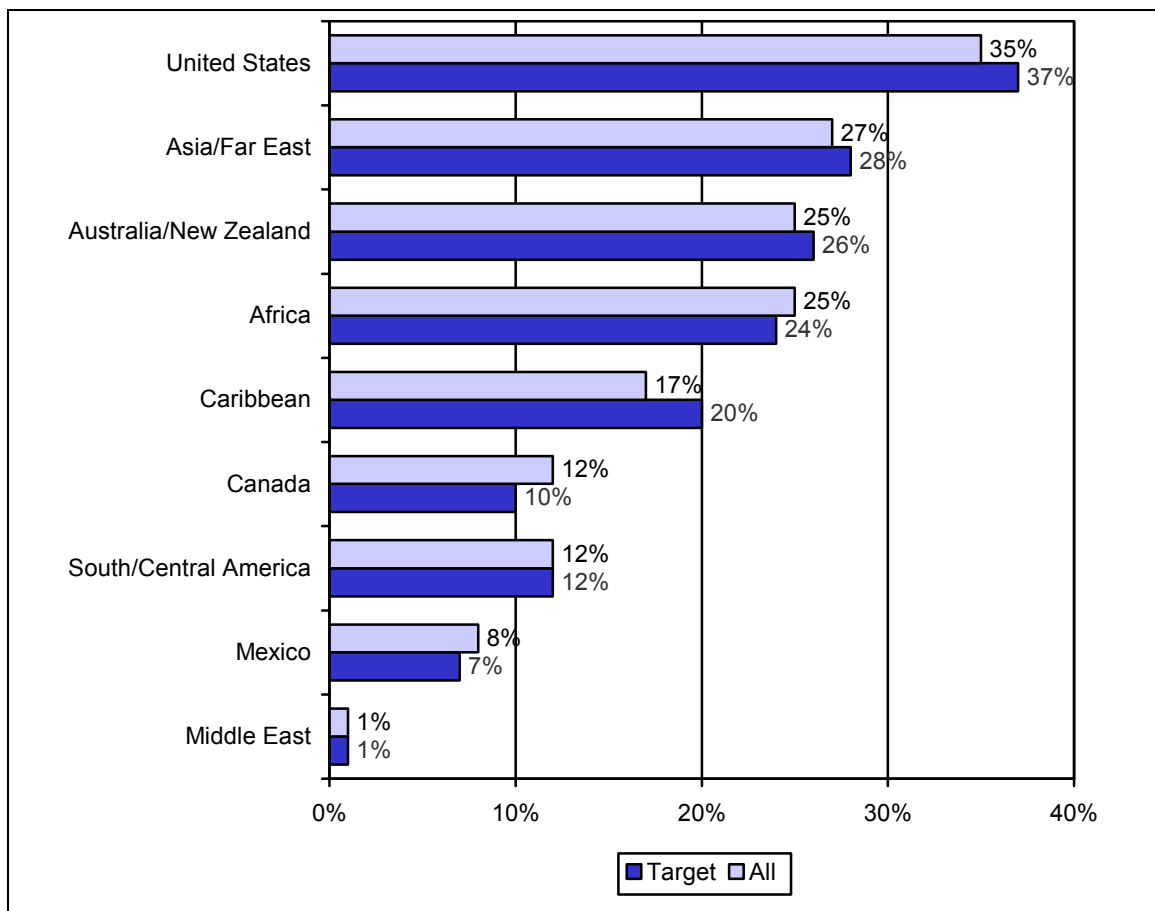


Exhibit 9 – Awareness of Long-Haul Holiday Destinations
Base: All respondents 25-64 (n=1030), Target population 30-54 (n=696).

Unaided awareness of Canadian holiday destinations is shown in **Exhibit 10**. The most frequent response, by far, was “Canada” in general (9.9%). Specific mentions of other holiday destinations were below 1 per cent. This reinforces the dominance of the “Canada” vacation brand among potential German travellers, with considerably lower recall of provincial brands such as Alberta, Ontario or B.C.

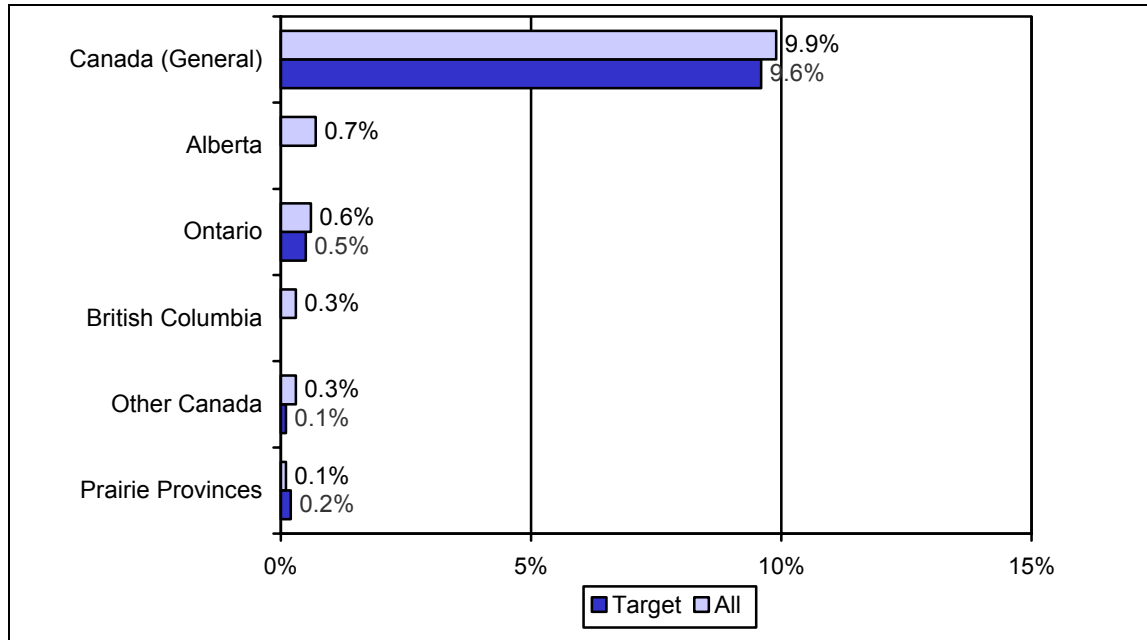


Exhibit 10 – Unaided Awareness of Canadian Destinations
 Base: All respondents 25-64 (n=1030), Target population 30-54 (n=696).

Future Travel Intentions

Respondents were asked to state the likelihood of visiting Canada in the next 12 months as a means of understanding future travel intentions. Approximately 2.7 per cent of respondents said that they were definitely or very likely planning to visit (see **Exhibit 11**). Travel intentions in this market are somewhat lower than in the U.K., but this has traditionally been the case for Germany and is consistent with previous ad tracking and consumer research studies.

Given a population of 9.8 million travellers in Germany this translates into over 264,000 long-haul travellers with above-average incomes who intend to visit, with close to 60,000 who are definitely planning a trip to Canada. Adding in travellers somewhat likely to visit brings the total *potential* to more than 578,000 travellers in the next year.

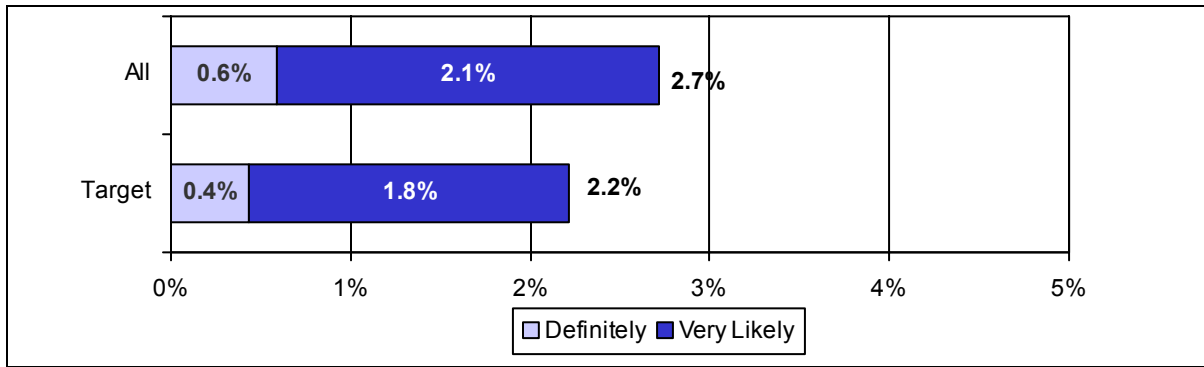


Exhibit 11 – Likelihood of Visiting Canada in the Next 12 Months

Base: All respondents 25-64 (n=1030), Target population 30-54 (n=696).

Those who were likely to visit Canada in the next 12 months (“definitely”, “very likely” or “somewhat likely”) were asked to indicate their likelihood of visiting selected provincial destinations (see **Exhibit 12**). Almost three-quarters of these prospective travellers identified Canada’s East Coast as a likely destination, followed closely by Ontario (67%) and British Columbia (66%). Half of all respondents mentioned the Northwest Territories, and almost 40 per cent mentioned Alberta.

These results are somewhat surprising, given the previous results for unaided awareness. Despite the low to non-existent awareness of Canada’s East Coast and the Northwest Territories, travel intentions to these regions are actually fairly healthy when travellers are specifically prompted. This suggests that the low unaided awareness level is simply a branding issue, with German travellers more aware of “Canada” per se, than of individual destinations within Canada.

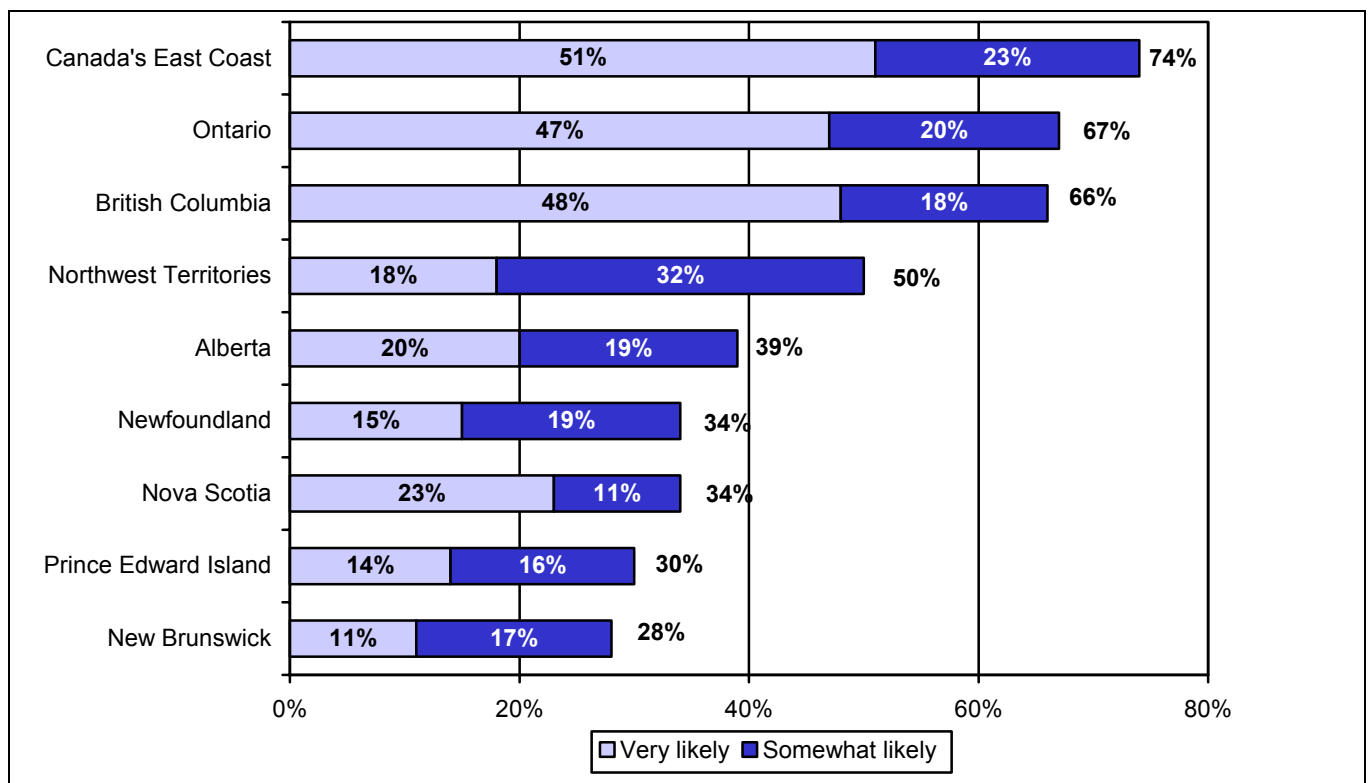


Exhibit 12 – Likelihood of Visiting Canadian Provinces

Base: Those who were “Definitely”, “Very likely”, or “Somewhat likely” to visit Canada in the next 12 months (n=51).

Note: Caution should be used in interpreting these results due to the small sample size.

In order to assess barriers to visitation, respondents who were unlikely to visit Canada in the next 12 months were asked to provide a reason. *Exhibit 13* shows the reasons most frequently mentioned by travellers. The top travel barrier was that there were other destinations that respondents wanted to visit more, mentioned by over a third (35%) of those unlikely to visit.

A second major barrier related to the perceived expense of a trip to Canada (16%), with the high cost of airfare (7%) being singled out as a deterrent. This has been observed repeatedly in previous studies, including both the 2001 German consumer study and previous conversion studies. Clearly, at 23 per cent mentioning an expense-related reason, many German travellers continue to feel that Canada is an expensive place to visit. Moreover, this is a more prevalent travel barrier in Germany than it is in the U.K. (16%).

German travellers typically seek out the sun and gravitate towards beach destinations. Therefore, it comes as no surprise that Canada's perceived colder weather was cited as a key travel barrier (9%). Approximately 8 per cent also mentioned that they prefer more exotic places (for example, the Caribbean is a top vacation spot for Germans). Again, this preference for warmer climates has been observed in numerous previous studies, and suggests that it is important to get across the message that Canada's summers are sunny and warm.

Distance also appears to be a major barrier for this market, more so than for the U.K. Proximity may be one reason why Canada's East Coast is so appealing.

Compared with these other factors, fear of terrorism and the war in Iraq were not significant travel barriers, with each being mentioned by only by a *small minority* of respondents (1%). It should be noted, however, that the study was conducted in February, before the war had begun.

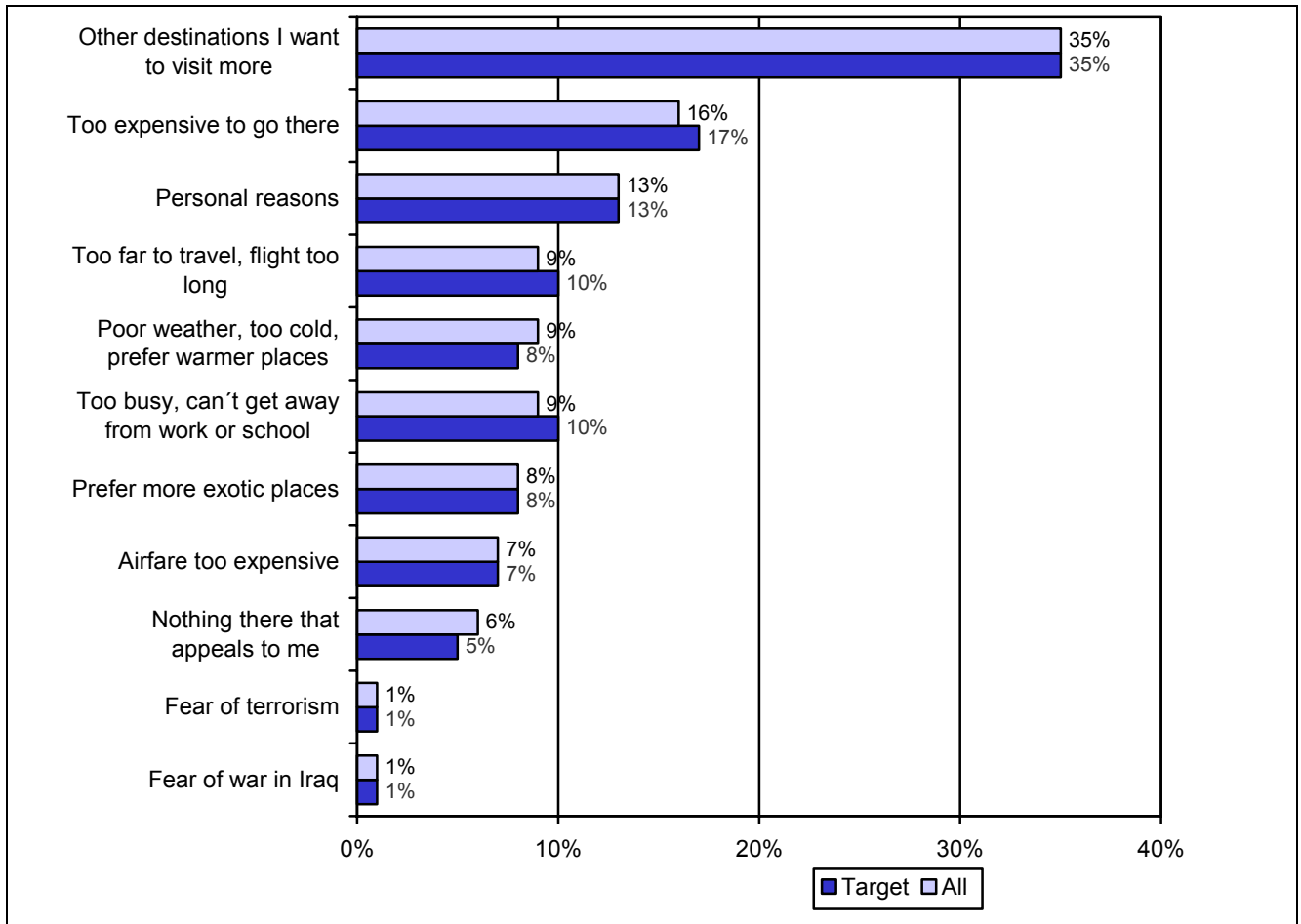


Exhibit 13 – Reasons Unlikely to Visit Canada

Base: Those unlikely to visit Canada in the next 12 months (n=965), Target population (n=696).

Note: Percentages may sum to more than 100 per cent due to multiple responses.

Perceptions of Canada

Respondents likely to visit Canada in the next 12 months were asked to rate a variety of attributes to determine how they perceive Canada as a travel destination (see *Exhibit 14*).

Generally, travellers feel that Canada is a place to enjoy the great outdoors (85%) and connect with nature (77%). As noted earlier, these attributes were prominent in the CTC’s advertising and communicated through its slogan “*Discover our true nature*”.

Respondents also see Canada as a place with lots to see and do (77%), and is felt to provide opportunities to see things they’ve never seen before (72%). In addition, it is viewed as a place for creating once in a lifetime memories (78%). Notably, Canada’s diversity and uniqueness were also keynotes of the CTC campaign.

As in the U.K., Canada is not viewed as a popular, trendy destination, a place to be pampered, or a destination for romance. Learning and exploring is also rated fairly poorly, significantly lower, in fact, than in the U.K.

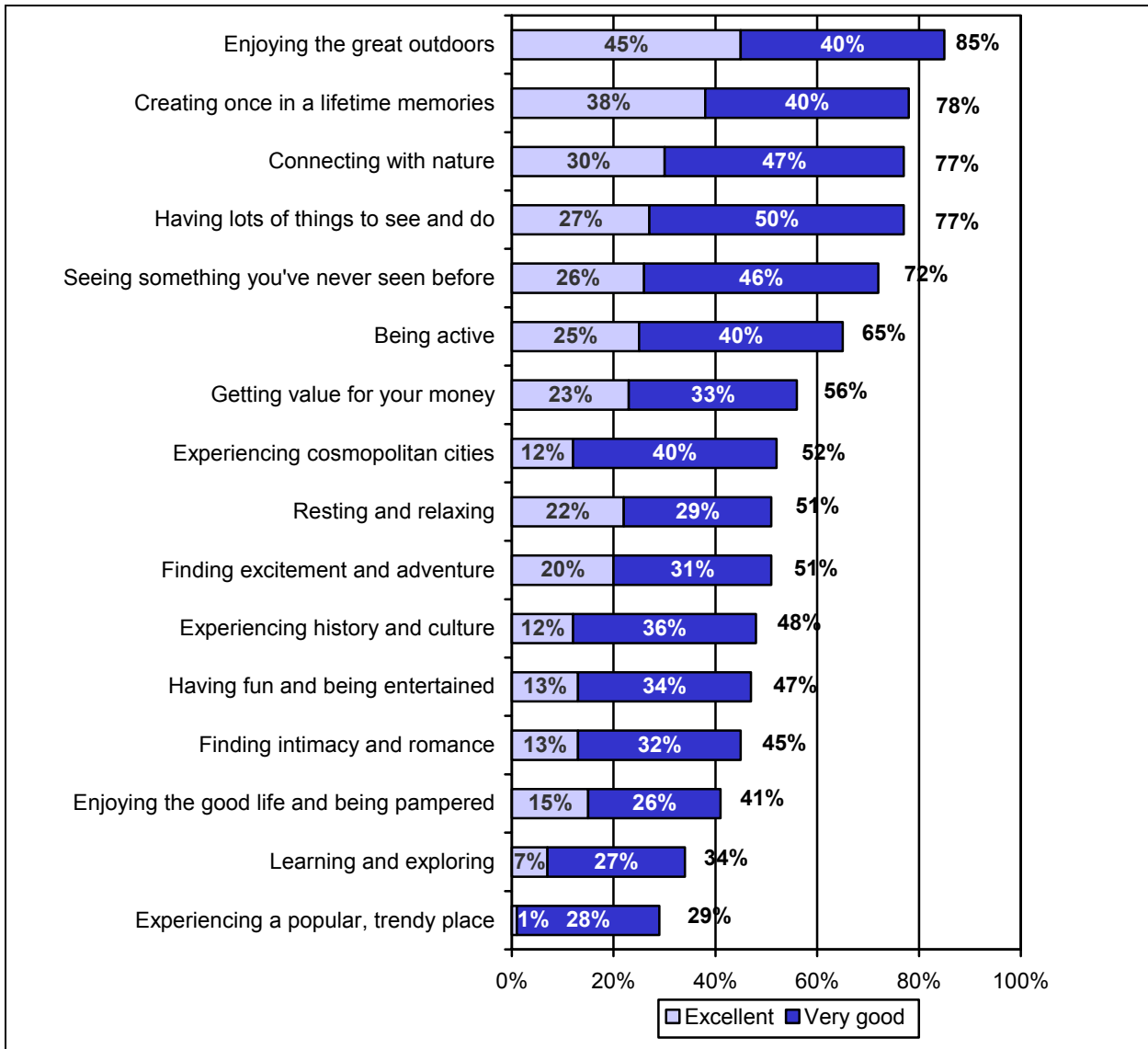


Exhibit 14 – Perceptions of Canada

Base: Those who were “Definitely”, “Very likely”, or “Somewhat likely” to visit Canada in the next 12 months (n=56).

Note: Caution should be used in interpreting these results due to the small sample size.

5. Impact of the Advertising Campaign

This chapter assesses the impact of the CTC campaign on those who saw it and examines audience response to the call for action. It also looks at the effect of the advertising on some of the key performance indicators (e.g., awareness and travel intentions), by comparing those who saw the campaign with those who did not.

Attitudinal Impacts

Respondents who saw the CTC television and magazine advertising were asked to rate several attributes describing the impact of the ads. For both the television and magazine ads, there were fairly strong levels of agreement with the positively framed attributes (see *Exhibits 15* and *16*).

Almost 70 per cent felt that the television advertisements made them feel more positive about Canada as a vacation destination. This was lower for the magazine advertising (54%), but not significantly so. As well, 63 per cent indicated that the television ads made them more likely to vacation in Canada, compared with 56 per cent who saw the magazine ads (again, not significantly different). Clearly, both the television and magazine ads had a positive impact on the mindset of viewers.

There were no differences in responses for the CTC's target population.

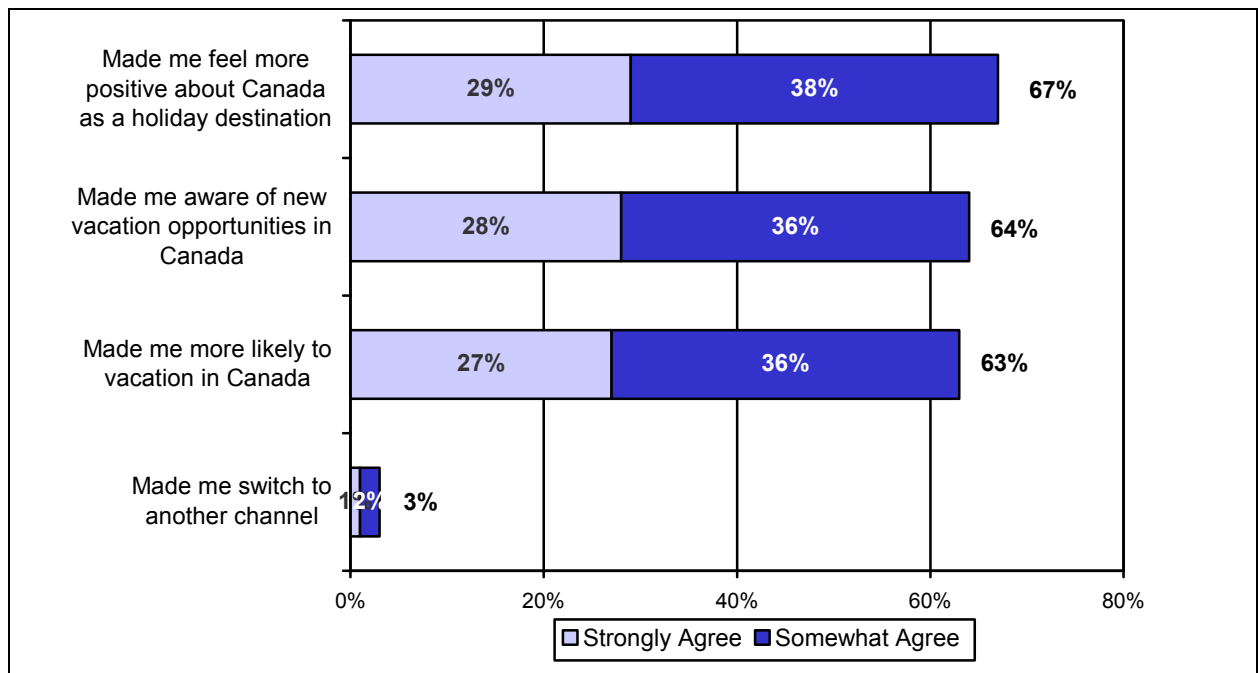


Exhibit 15 – Attitudinal Impacts of CTC Television Advertisements

Base: Those who saw CTC television advertisements (n=131).

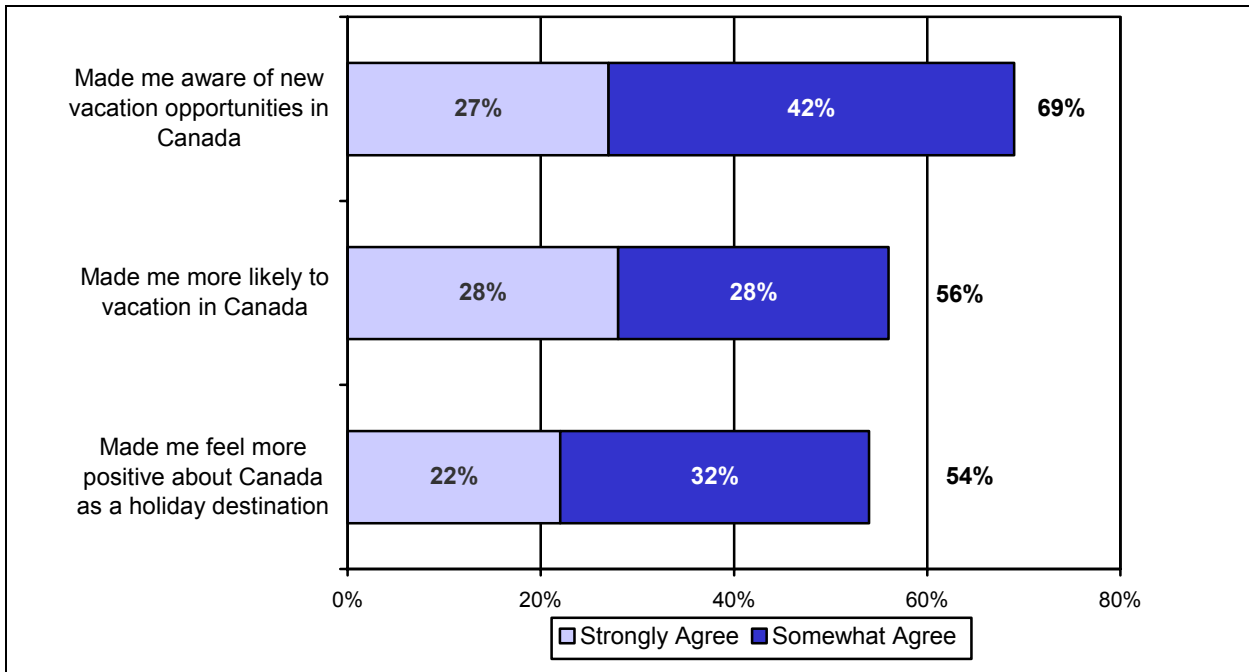


Exhibit 16 – Attitudinal Impacts of CTC Magazine Advertisements

Base: Those who saw CTC magazine advertisements (n=81).

Note: Caution should be used in interpreting these results due to the small sample size.

Actions Taken in Response to the Campaign

Of those who saw the CTC television or magazine advertising, 7 per cent sought further information on travel to Canada (see *Exhibit 17*). This represents an estimated 133,000 long-haul travellers of above-average income responding to the campaigns' call for action.

The two main information sources consulted by this group were travel agents and the internet. Almost two-thirds talked to a travel agent about Canada, which shows the continued reliance of long-haul travellers on the travel industry. This is a characteristic that makes the German market distinct from many other European travel markets.

Notably, 64 per cent visited non-CTC internet sites (e.g., those of the partners or other organizations), while 40 per cent visited the internet site indicated in the ad. Quite clearly, the internet has become a major research and planning tool for potential travellers to Canada, with travellers often checking out multiple sites for information. In fact, these results suggest that the advertising drove far more travellers to the internet than to the more traditional call centre.

None of the respondents surveyed had called the tour operator partners directly, perhaps because they were not yet ready to book so soon after the campaign. However, keep in mind that there were only 14 respondents in the sample who had seen the CTC advertising and called for further information which is much too small to be conclusive. In fact, figures for all of the information sources should be interpreted with caution due to the small sample size.

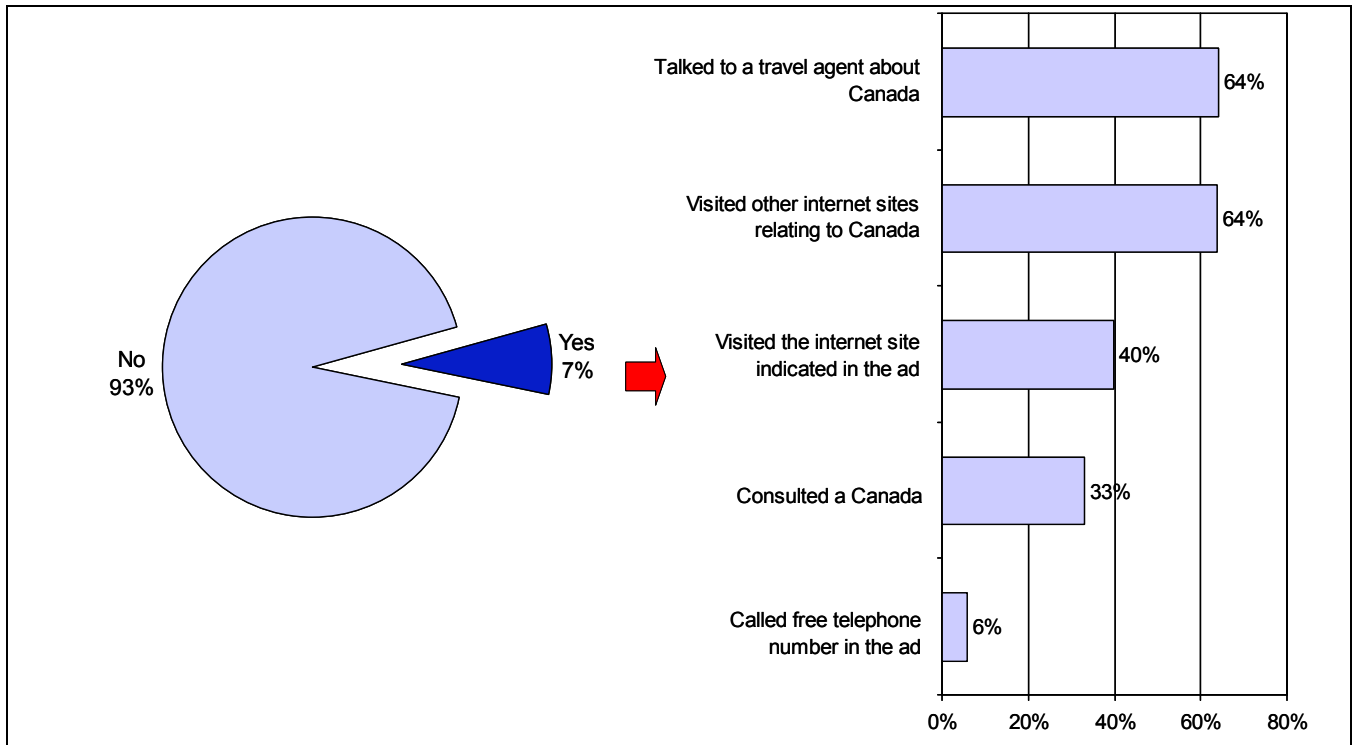


Exhibit 17 – Information Sources Consulted in Response to CTC Advertising

Base: Those who saw the CTC tv or magazine advertisements (n=196); Those who sought additional information (n=14).

Note: Percentages for information sources add to more than 100 per cent due to multiple responses.

Results for information sources should be interpreted with caution due to the small sample size.

A key objective of this year’s campaign was to encourage actual bookings to Canada. To assess immediate trips taken, those who saw the CTC television or magazine ads were asked whether they had taken or booked a trip to Canada since seeing the advertising (see *Exhibit 18*).

Somewhat surprisingly, 4.6 per cent of advertising viewers reported having booked or taken a trip to Canada, despite the fact that only a few weeks had passed since the advertising had aired. However, more than half of these trips had already been planned prior to seeing the advertising.

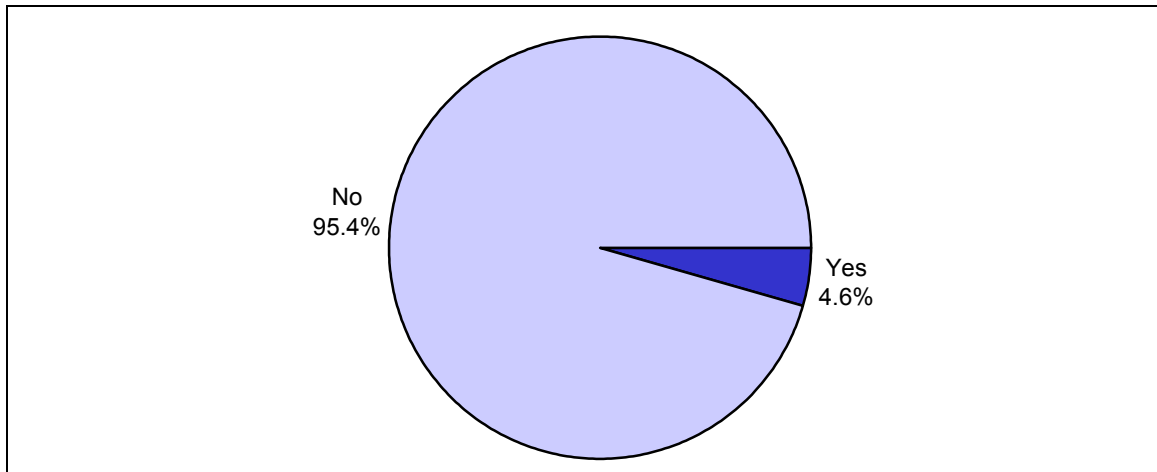


Exhibit 18 – Took or booked a Pleasure Trip to Canada Since Seeing CTC Advertising
 Base: Those who saw the CTC television or magazine advertisements (n=195)

Impact on Awareness and Travel Intentions

As a secondary objective, the advertising was also intended to raise awareness of Canada in the marketplace. *Exhibit 19* shows that there was a higher level of unaided recognition of Canada as a travel destination among those who saw the CTC advertising (17%), compared with those who didn't (11%). However, this was not statistically significant due to the small sample of those who had seen the advertising.

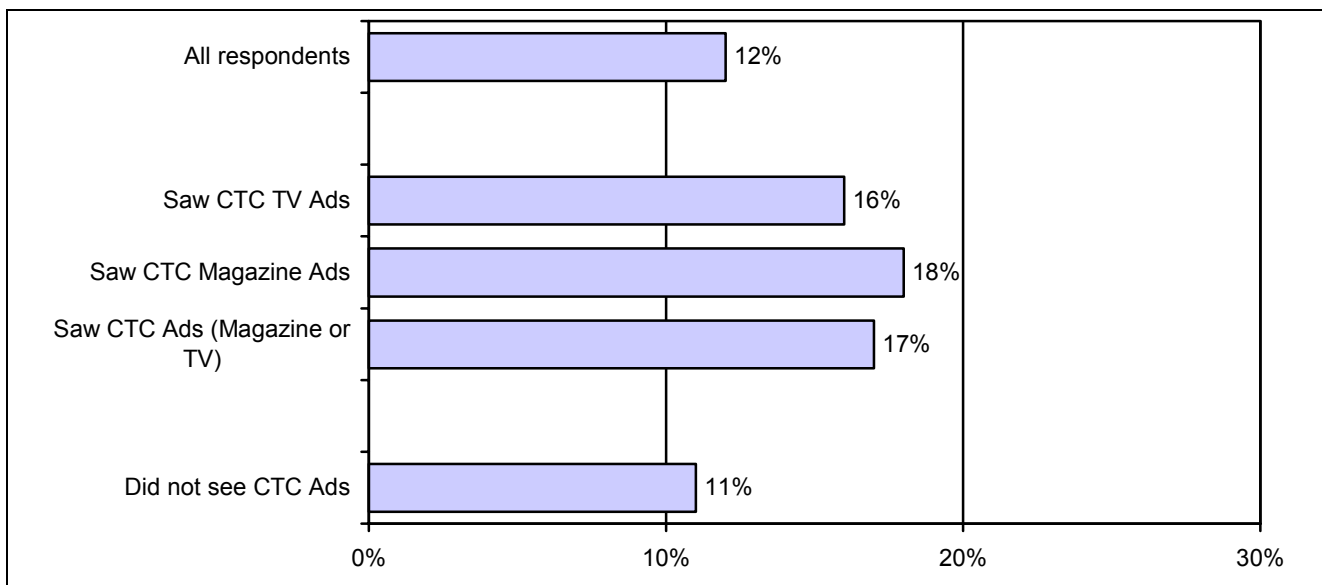


Exhibit 19 – Awareness of Canada Among Advertising Viewers

Base: All respondents (n=1030), Saw advertising for Canada (n=252), Saw CTC tv ads (n=132), Saw CTC magazine ads (n=82), Saw CTC tv or magazine ads (n=197), Did not see CTC ads (n=833)

As shown in *Exhibit 20*, the likelihood of visiting Canada during the next 12 months was significantly greater for those who saw the CTC's *television* campaign, compared with those who did not see any CTC advertising. This suggests that the television advertising successfully enhanced future travel intentions in the marketplace.

Results for the magazine advertising, however, were not as clearcut, with higher intentions among those who saw the magazine ads, but not significantly so. However, the magazine campaign was still in its early stages and likely did not have a chance to make its full impact at the time the study was conducted.

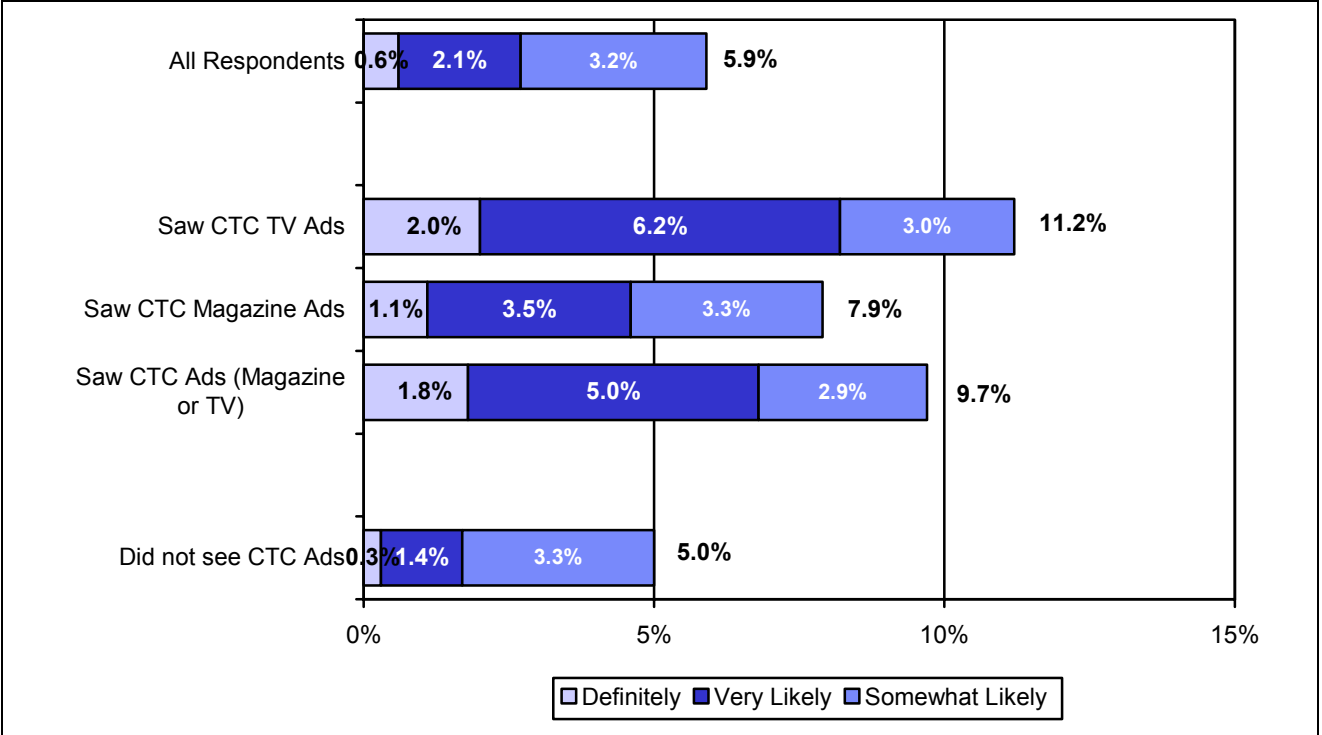


Exhibit 20 – Likelihood of Visiting Canada Among Advertising Viewers

Base: All respondents (n=1030), Saw advertising for Canada (n=252), Saw CTC tv ads (n=132), Saw CTC magazine ads (n=82), Saw CTC tv or magazine ads (n=197), Did not see CTC ads (n=833).

Exhibit 21 shows a comparison of the likelihood of visiting different provinces and regions in Canada between those who saw the CTC advertising and those who didn't. Because of the extremely small sample sizes, the results are not conclusive, and are provided for information only. The overall trend, however, is suggestive of a positive impact for the campaign partners.

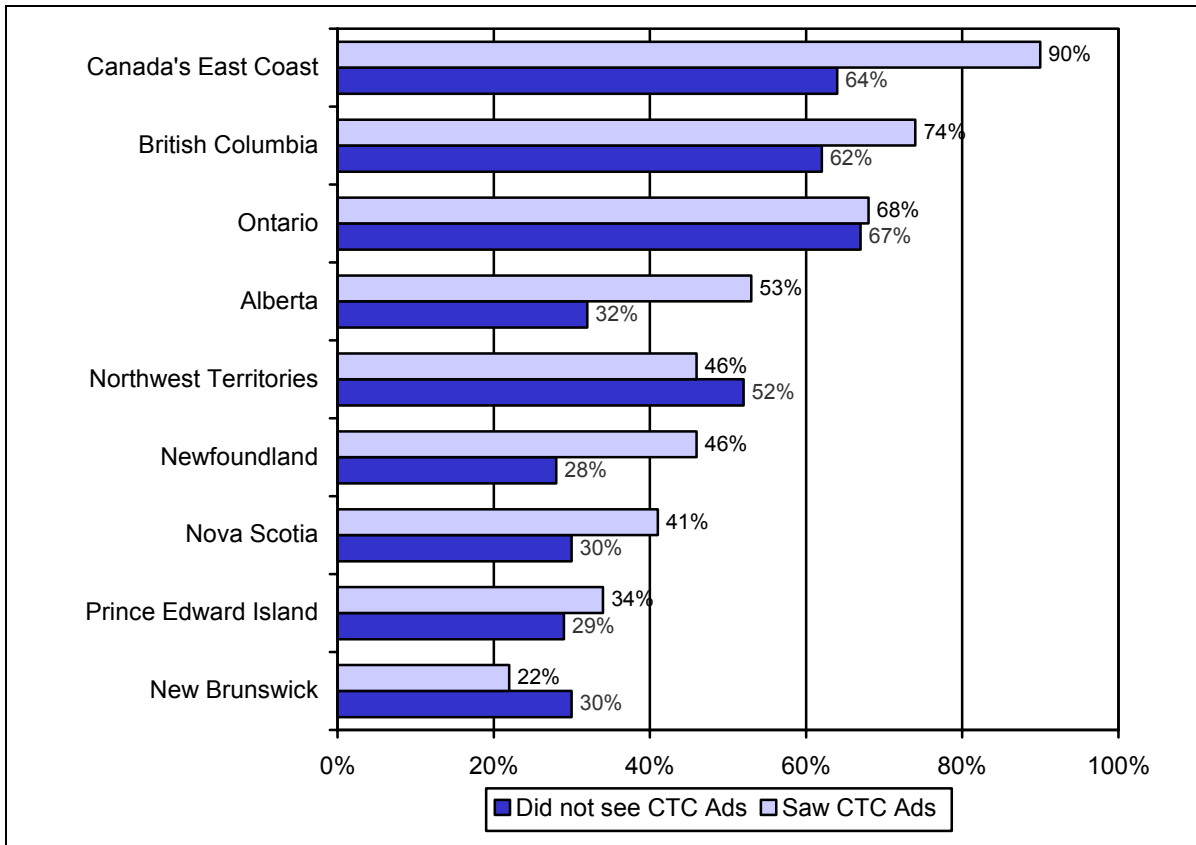


Exhibit 21 – Likelihood of Visiting Canadian Provinces Among Advertising Viewers

Base: Those who were likely to visit Canada in the next 12 months - Saw CTC tv or magazine ads (n=19), Did not see CTC ads (n=33).

Note: Due to the small sample sizes, this is presented for information only.

Impact on Perceptions of Canada

Exhibit 22 shows five attributes where differences in the perceptions of Canada are greatest between those who saw the ads, and those who did not. Again, this is provided for information only. While the small sample size means that none of these results are statistically significant, the overall trend suggests the advertising may be having some impacts on market perceptions.

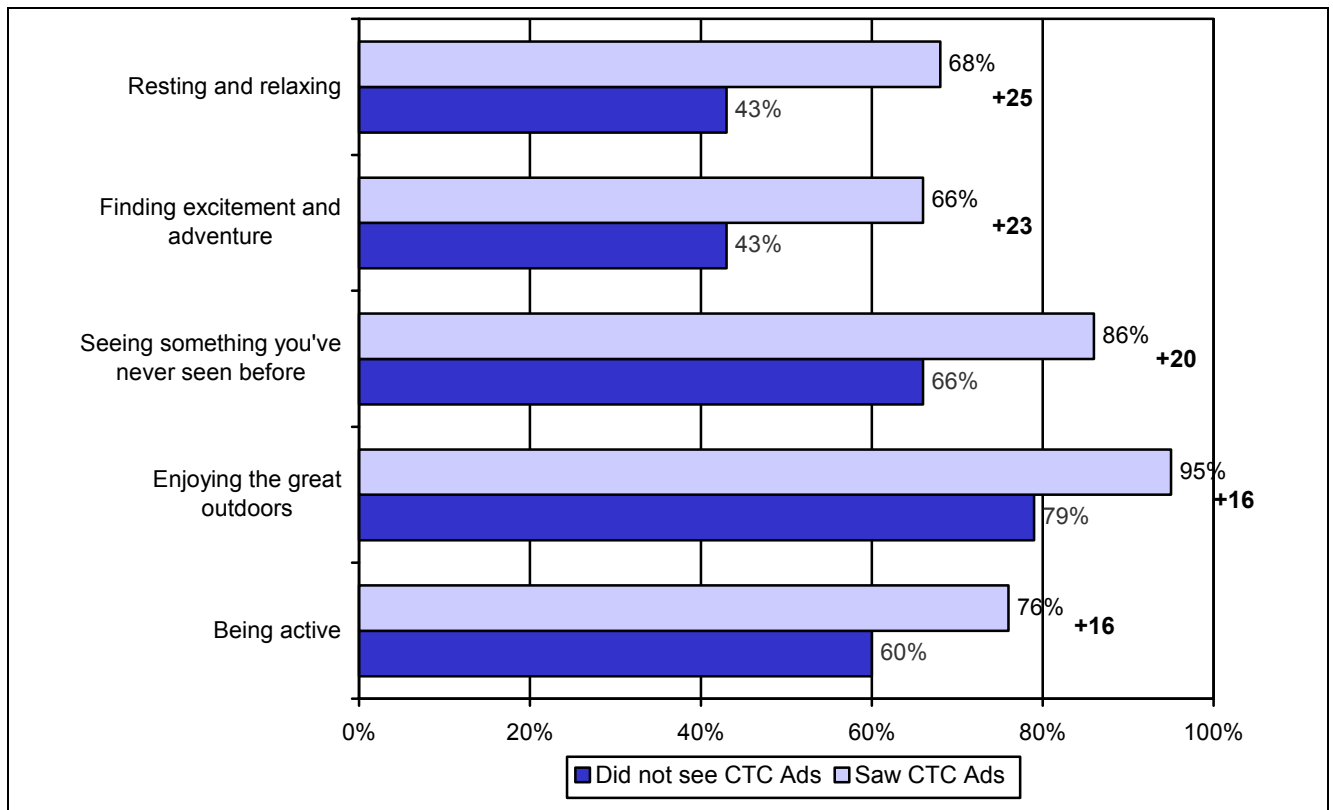


Exhibit 22 – Perceptions of Canada That Were Higher Among Advertising Viewers

Base: Those who were likely to visit Canada in the next 12 months - Saw CTC tv or magazine ads (n=19), Did not see CTC ads (n=37).

Note: Due to the small sample sizes, this is presented for information only.

Product Interests

Exhibit 23 shows the likelihood of taking different types of trips to Canada for those who were likely to visit Canada in the next 12 months. Between 85 per cent and 90 per cent said they were likely to take a trip to enjoy nature or a touring trip to a number of destinations. A substantial proportion of the market was also interested in an outdoors adventure trip.

Of lesser interest, but still popular, were aboriginal culture trips, culture/history trips in general and city trips (with 50% to 60% interested in these products). This is consistent with previous consumer research, which showed a higher than average market interest in cultural trips, and aboriginal culture specifically. The very low likelihood of taking a winter trip is also consistent with both earlier results and previous studies, which suggests that Canada's cold weather is a major travel barrier for German travellers.

Again, it should be stressed that these results are more qualitative in nature, due to the small sample size.

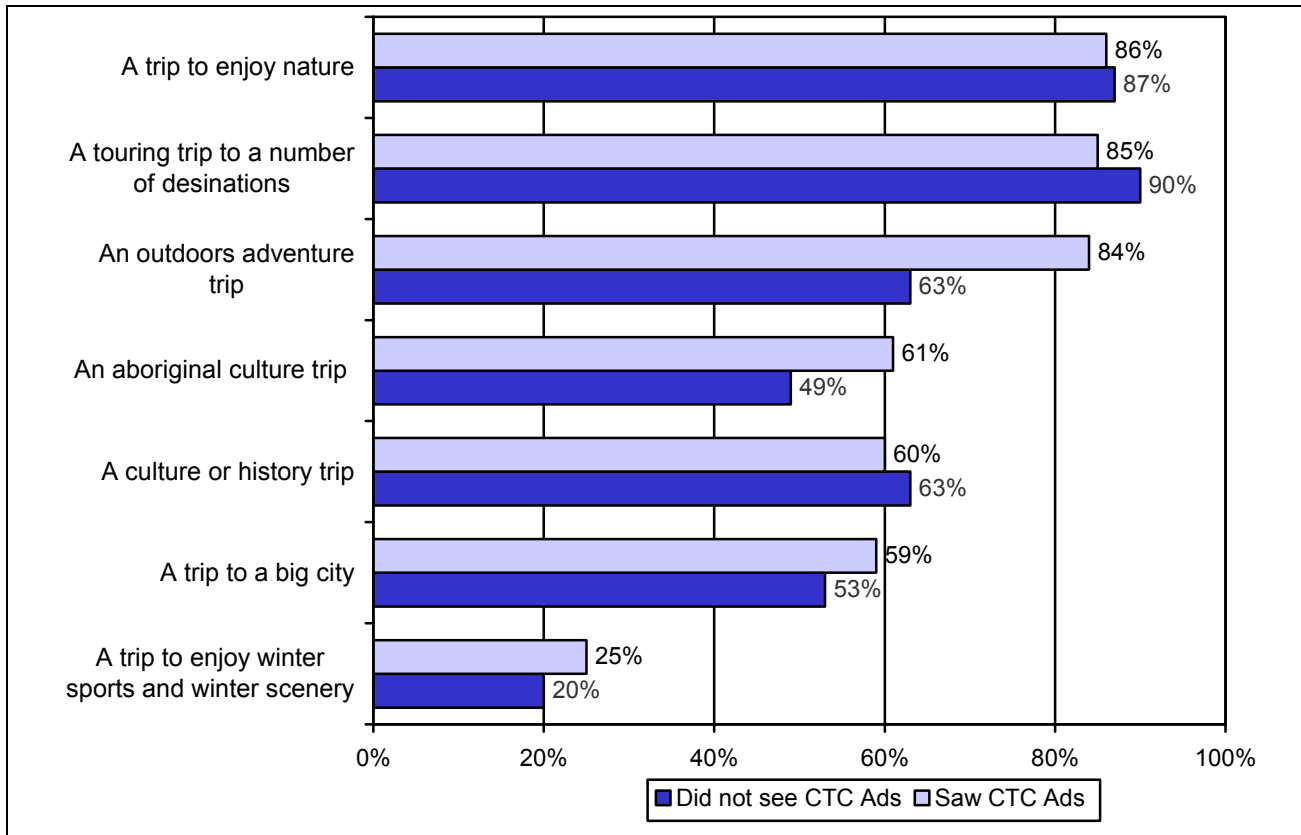


Exhibit 23 – Likelihood of Taking Different Trip Types in Canada

Base: Those who were likely to visit Canada in the next 12 months - Saw CTC tv or magazine ads (n=19), Did not see CTC ads (n=37).

Note: Due to the small sample sizes, this is presented for information only.

6. Audience Demographics

Exhibit 24 presents an overview of the demographic characteristics of those who recalled seeing the CTC advertising (television or magazine), compared with all survey respondents. In most respects, viewers of the advertising mirrored respondents as a whole. This is not all that surprising, since the survey population was designed to reflect the target audience for the advertising. The major exception is that advertising viewers were less likely to live in the Schleswig-Holstein / Hamburg / Bremen / Lower Saxony region, and more likely to live in the Thuringia / Saxony region. Again, this suggests that the advertising may have had better than average penetration in Thuringia / Saxony.

In addition, those who saw the CTC advertising were slightly less likely to have children living at home, somewhat more likely to have close friends or relatives living in Canada, and also, slightly more likely to be male. These results suggest that the advertising *may* have had better penetration in these groups, but because of the small sample of advertising viewers, these differences are not statistically significant.

	ALL RESPONDENTS (N=1,030)	SAW CTC MAGAZINE OR TELEVISION ADS (N=197)
REGION		
Baden-Wuerttemberg	12%	12%
Bavaria	19%	18%
Berlin	5%	3%
Hesse / Rhineland / Saarland	14%	17%
Mecklenburg-Western Pomerania / Brandenburg / Saxony-Anhalt	8%	8%
North Rhine	21%	21%
Schleswig-Holstein / Hamburg / Bremen / Lower Saxony	12%	7%
Thuringia / Saxony	9%	15%
GENDER		
Male	54%	60%
Female	46%	40%
AGE		
25-29	19%	23%
30-34	12%	11%
35-44	26%	25%
45-54	20%	20%
55-64	24%	22%
WORK STATUS		
Working Full Time (30+ hrs/week)	60%	63%
Working Part Time (8-29 hrs/week)	14%	10%
Housewife	7%	5%
Retired	11%	12%
Unemployed	2%	1%
Student	4%	8%
Other (including disabled)	2%	2%

	ALL RESPONDENTS (N=1,030)	SAW CTC MAGAZINE OR TELEVISION ADS (N=197)
MARITAL STATUS		
Married or living together	59%	59%
Single	27%	27%
Divorced/Widowed/Separated	15%	14%
HAVE CHILDREN UNDER 18 IN HOUSEHOLD		
Yes	40%	35%
HAVE CLOSE FRIENDS OR RELATIVES LIVING IN CANADA		
Yes	18%	25%
HIGHEST LEVEL OF EDUCATION		
No qualifications	0%	0%
Primary school	15%	15%
Middle school	34%	35%
Trade school, high school w/o Abitur	3%	3%
High school with Abitur	20%	22%
University degree	28%	26%
MONTHLY HOUSEHOLD INCOME*		
1,800 - 2,300 Euros	36%	34%
2,300 - 2,800 Euros	23%	24%
2,800 - 3,300 Euros	16%	18%
3,300 - 3,800 Euros	9%	9%
3,800 - 4,300 Euros	6%	4%
4,300 Euros or over	11%	12%

Exhibit 24 – Audience Demographics

Note: *After taxes and social security contribution.

7. Conclusion

Overall, the results of the evaluation study show that the CTC advertising campaign achieved good penetration in Germany and made a positive impact on viewers. In fact, a key finding was that unaided awareness of advertising for Canada among the CTC's target group was almost six times higher than in 2001.

Moreover, approximately 20 per cent of respondents indicated that they had seen the CTC television or magazine ads, representing coverage of almost 1.9 million German long-haul travellers with above average incomes. About 13 per cent of travellers reported seeing the television advertising, while 8 per cent saw the magazine ads. It should be noted, however, that the survey was conducted shortly following the launch of the magazine campaign, so these results are likely a conservative estimate of awareness for the magazine initiative, and hence, for the CTC advertising as a whole.

In general, the advertising was well received by viewers. The television advertisements were rated by 98 per cent as visually appealing, by 87 per cent as interesting, and by 78 per cent as informative. Furthermore, over half of both television and magazine advertising viewers reported that the advertising made them feel more positive about Canada as a vacation destination, opened them to new vacation possibilities, and enhanced their likelihood of visiting Canada. The only negative comment was that the television advertisements were not all that unique, which led viewers to feel they were somewhat unmemorable.

The advertising was very successful in producing an immediate viewer response, with 7 per cent of all viewers seeking further information on travel to Canada in response to the ads. As well, just under 5 per cent said they had taken or booked a trip to Canada since seeing the advertising (although some of these trips were planned prior to seeing the advertising). A conversion study later this year will provide a more complete assessment of the trips and revenues generated by the campaign.

Unaided awareness of Canada as a holiday destination stood at 12 per cent, with close to 3 per cent of all long-haul travellers definitely or very likely to visit in the next 12 months. In the absence of baseline (or pre-advertising) data, it is difficult to say whether the advertising improved these indicators or not from before-campaign levels. However, the results definitely show that the television advertising had a positive effect on *those who saw it*, significantly enhancing their likelihood of visiting Canada (11%) over that of non-viewers (5%).

The evaluation study also shows that the "Canada" brand predominates in Germany, for both advertising and destination awareness. Although interest in visiting the provincial and regional partners is quite healthy among those interested in Canada, overall brand awareness remains fairly low, with German travellers much more aware of "Canada" as a whole. The partners clearly need to continue their brand-building initiatives if they wish to grow their market share in the future.

Appendix I – Advertising Evaluation Questionnaire

Hello, my name is _____ from _____, a company that specializes in marketing research. Today we are talking to people across the Germany about pleasure travel. I am not trying to sell you anything. I would just like to get your opinions. This will only take about 10 minutes of your time.

SCREENER:

1) RECORD REGION: **DO NOT ASK.**

Baden- Wuerttemberg	1
Bavaria	2
Berlin.....	3
Brandenburg.....	4
Bremen	5
Hamburg.....	6
Hesse	7
Lower Saxony	8
Mecklenburg-Western Pomerania.....	9
North-Rhine.....	10
Rhineland	11
Saarland.....	12
Saxony.....	13
Saxony-Anhalt.....	14
Schleswig-Holstein	15
Thuringia.....	16

2) RECORD GENDER: **DO NOT ASK.**

Male.....	1
Female	2

3) In the past three years, that is since February 2000, have you taken a holiday trip by plane, to somewhere outside of Europe and the Mediterranean for four nights or longer? Please include trips to visit friends and relatives and business trips on which you combined business with a holiday trip.

Yes.....	1
No.....	2

4) In the next two years, that is before February 2005, how likely is it that you will take a holiday trip by plane somewhere outside Europe and the Mediterranean for 4 nights or longer? Are you: **READ LIST. SINGLE RESPONSE.**

- Definitely going to take such a trip 5
- Very likely to take such a trip 4
- Somewhat likely to take such a trip..... 3
- Not very likely to take such a trip OR..... 2
- Not at all likely to take such a trip..... 1

5) In which of the following age categories do you belong? **READ LIST. SINGLE RESPONSE.**

- Under 18..... 0 -> TERMINATE
- 18-24 1
- 25-29 2
- 30-34 3
- 35-44 4
- 45-54 5
- 55-64 6
- 65-74 7
- 75 and over..... 8

DO NOT READ:

- Refused..... 9 -> TERMINATE

6) Is your average monthly household income after taxes and social security contributions above or below 1,800 Euros per month?

- 1,800 Euros or above..... 1
- Below 1,800 Euros 2
- Don't Know / Refused..... 9 -> TERMINATE

IF (Q5 = 1, 7 OR 8) OR (Q6 = 2) OR [(Q3 = 2) AND (Q4 = 1 TO 3)] -> TERMINATE

IN OTHER WORDS, ONLY PAST/POTENTIAL TRAVELLERS (Q3 = 1) OR (Q4 = 4 OR 5), AGED 25 TO 64, EARNING MEDIAN OR ABOVE INCOMES CONTINUE WITH MAIN SURVEY .

MAIN SURVEY:

- 7a) What destination or place first comes to mind when you think about taking a holiday trip outside Europe and the Mediterranean? **DO NOT READ.**
- 7b) What other places come to mind for a holiday trip outside Europe and the Mediterranean? **DO NOT READ. RECORD SPECIFIC MENTIONS OF CANADIAN PROVINCES AND CITIES IN APPROPRIATE CATEGORIES. PROBE:** Any others?

	7A FIRST MENTION	7B OTHER MENTIONS
Canada (general mention)	1	1
British Columbia (Vancouver, Victoria, Whistler)	2	2
Alberta (Calgary, Edmonton, Banff, Jasper)	3	3
Prairie Provinces (Saskatchewan, Regina, Manitoba, Winnipeg)	4	4
Ontario (Toronto, Ottawa, Niagara Falls)	5	5
Québec (Montréal, Québec City)	6	6
Canada's East Coast/Atlantic Canada/Maritimes (general mention)	7	7
-New Brunswick (Fredericton, St. John)	8	8
-Newfoundland (St. John's, Labrador)	9	9
-Nova Scotia (Halifax)	10	10
-Prince Edward Island (Charlottetown)	11	11
Northern Canada (general mention)	12	12
-Yukon	13	13
-Nunavut	14	14
-Northwest Territories	15	15
Rocky Mountains	16	16
Other Canada	17	17
United States	18	18
Mexico	19	19
Caribbean/West Indies	20	20
South/Central America	21	21
Africa (general mention)	22	22
-South Africa	23	23
-Other Africa	24	24
Australia/New Zealand	25	25
Other South Pacific	26	26
Asia/Far East/Pacific (general mention)	27	27
-Hong Kong/China	28	28
-Taiwan	29	29
-Japan	30	30
-South-east Asia (Thailand, Singapore, Malaysia, Philippines)	31	31
-Other Asia/Far East/Pacific	32	32
Middle East	33	33
Other	97	97
None	98	98
Don't Know	99	99

- 8) For which destinations or places have you seen or heard advertising relating to travel or holidays in the last two months? **PROBE:** Any others? **DO NOT READ. CODE THE FIRST MENTION IN THE FIRST COLUMN AND THE OTHER MENTIONS IN THE SECOND COLUMN. RECORD SPECIFIC MENTIONS OF CANADIAN PROVINCES AND CITIES IN APPROPRIATE CATEGORIES.**

	8A FIRST MENTION	8B OTHER MENTIONS
Canada (general mention)	1	1
British Columbia (Vancouver, Victoria, Whistler)	2	2
Alberta (Calgary, Edmonton, Banff, Jasper)	3	3
Prairie Provinces (Saskatchewan, Regina, Manitoba, Winnipeg)	4	4
Ontario (Toronto, Ottawa, Niagara Falls)	5	5
Québec (Montréal, Québec City)	6	6
Canada's East Coast/Atlantic Canada/Maritimes (general mention)	7	7
-New Brunswick (Fredericton, St. John)	8	8
-Newfoundland (St. John's, Labrador)	9	9
-Nova Scotia (Halifax)	10	10
-Prince Edward Island (Charlottetown)	11	11
Northern Canada (general mention)	12	12
-Yukon	13	13
-Nunavut	14	14
-Northwest Territories	15	15
Rocky Mountains	16	16
Other Canada	17	17
United States	18	18
Mexico	19	19
Caribbean	20	20
South/Central America	21	21
Africa (general mention)	22	22
-South Africa	23	23
-Other Africa	24	24
Australia/New Zealand	25	25
Other South Pacific	26	26
Asia/Far East/Pacific (general mention)	27	27
-Hong Kong/China	28	28
-Taiwan	29	29
-Japan	30	30
-South-east Asia (Thailand, Singapore, Malaysia, Philippines)	31	31
-Other Asia/Far East/Pacific	32	32
Middle East	33	33
Europe	34	34
Other	97	97
None	98	98
Don't Know	99	99

IF (Q8a = 1 TO 17) OR (Q8b = 1 TO 17) -> SKIP TO Q10

9) Do you remember seeing or hearing any advertising for Canada or places in Canada within the last 2 months?

- Yes..... 1
- No..... 2 ->SKIP TO Q13a
- Don't Know..... 9 ->SKIP TO Q13a

10a) In which media do you remember seeing or hearing the ads for Canada or places in Canada in the last 2 months? **DO NOT READ LIST. MULTIPLE RESPONSE.**

10b) In the last 2 months, do you remember seeing any ads for Canada... **READ LIST. READ ONLY ITEMS NOT MENTIONED IN 10a.**

	10a	10b
	<u>Unaided</u>	<u>Aided</u>
On television	1	1
On the radio.....	2	
In the newspaper	3	
On billboards.....	4	
In magazines.....	5	5
In the mail	6	
At the cinema	7	
On the Internet.....	8	
Other.....	97	
Don't Know.....	99	

IF (Q10a = 1 OR 5) OR (Q10b = 1 OR 5) CONTINUE, ELSE SKIP TO Q13a

SAW TV OR MAGAZINE ADS FOR CANADA
--

11) What images do you recall seeing in the advertising for Canada? **PROBE:** Do you remember anything else? **DO NOT READ. MULTIPLE RESPONSE.**

Anne of Green Gables	1
Arches/rock formations	2
Banff/National Parks	3
Beach	4
Boats	5
Cities/skyline	6
CN Tower	7
Coastline	8
Cruises	9
Cuisine/fine dining	10
Gardens	11
Golf/golf course	12
Hiking	13
Hockey	14
Horses/men on horses	15
Hotel and bellboy	16
Icebergs	17
Kayaks/canoes	18
Lakes/rivers/Lake Louise	19
Lighthouse	20
Motorcycling	21
Mountains/Rocky Mountains	22
Mountie	23
Natives	24
Niagara Falls/waterfalls	25
Rodeo/Calgary Stampede	26
Scenery/outdoor scenes	27
Sea plane over water	28
Ships/tall ships	29
Totem, native art	30
Whales	31
Wildlife (Canada Geese, Bear, Rabbit)	32
Alberta/Calgary	33
British Columbia/Vancouver/Victoria	34
Ontario/Toronto	35
Canada's East Coast/Atlantic Canada	36
Northwest Territories	37
Air Transat/plane/pilots	38
DerTour packages	39
Discover our true nature	40
Canadian Tourism Commission maple leaf logo	41
Free telephone number (0-800-#)	42
Websites (e.g., www.jetztcanada/jetzt-nach-canada aufbrechen-nach-kanada)-	43
Many colourful images of Canada	44
Other (specify):	97
Don't recall anything specific	99

- 12) Which provinces or destinations do you remember seeing or hearing about in the advertising for Canada? **DO NOT READ. MULTIPLE RESPONSE. PROBE:** Any others?

British Columbia	1
Vancouver.....	2
Victoria.....	3
Whistler	4
Alberta.....	5
Calgary.....	6
Edmonton.....	7
Lake Louise	8
Banff.....	9
Rockies/Rocky Mountains	10
Ontario.....	11
Toronto	12
Ottawa.....	13
Niagara Falls.....	14
Canada’s East Coast/Atlantic Canada	15
New Brunswick	16
Newfoundland/Labrador.....	17
Nova Scotia.....	18
Prince Edward Island.....	19
Northwest Territories	20
Montreal	21
National Parks	22
Other (specify):.....	97
Don’t Know.....	99

ALL RESPONDENTS

- 13a) In the last two months, do you remember seeing a series of television ads showing many colourful images of Canada. Each ad featured a different destination in Canada, including British Columbia, Alberta, Ontario, Canada’s East Coast and the Northwest Territories. The ads invited you to “Aufbrechen nach Kanada” and Discover Our True Nature. The ads also gave prices for holiday packages to Canada and had a free telephone number that you could call to obtain a free holiday guide. Please tell me if you have definitely seen these television ads, think you have seen them or have not seen them?

Definitely saw	1	
Think they saw	2	
Have not seen	3	->SKIP TO Q14a
Don’t Know.....	9	->SKIP TO Q14a

13b) Thinking about the television ads you saw for Canada, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.

The advertisements were... (READ) (ROTATE ITEMS)	<i>Strongly Agree</i>	<i>Somewhat Agree</i>	<i>Somewhat Disagree</i>	<i>Strongly Disagree</i>	<i>Don't Know</i>
Interesting	4	3	2	1	9
Unique	4	3	2	1	9
Boring	4	3	2	1	9
Visually Appealing	4	3	2	1	9
Unmemorable	4	3	2	1	9
Informative	4	3	2	1	9
Better than other travel ads I have seen on television	4	3	2	1	9
The advertisements... (READ) (ROTATE ITEMS)					
Made me aware of new vacation opportunities in Canada	4	3	2	1	9
Made me feel more positive about Canada as a holiday destination	4	3	2	1	9
Made me more likely to vacation in Canada	4	3	2	1	9
Made me switch to another channel	4	3	2	1	9

14a) In the last month, do you remember seeing a series of magazine ads featuring British Columbia, Alberta, Ontario, Canada's East Coast and the Northwest Territories. The ads included pictures of lakes, mountains, waterfalls, icebergs, and other images of Canada's outdoors and natural beauty. The ads invited you to Discover our True Nature and gave prices for holiday packages in Canada. Please tell me if you have definitely seen these magazine ads, think you have seen them or have not seen them?

- Definitely saw 1
- Think they saw 2
- Have not seen 3 ->GO TO SKIP BEFORE Q15
- Don't Know..... 9 ->GO TO SKIP BEFORE Q15

- 14b) Thinking about the magazine ads you saw for Canada, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.

The advertisements... (READ) (ROTATE ITEMS)	<i>Strongly Agree</i>	<i>Somewhat Agree</i>	<i>Somewhat Disagree</i>	<i>Strongly Disagree</i>	<i>Don't Know</i>
Made me aware of new vacation opportunities in Canada	4	3	2	1	9
Made me feel more positive about Canada as a holiday destination	4	3	2	1	9
Made me more likely to vacation in Canada	4	3	2	1	9

SAW CTC TV OR MAGAZINE ADS

IF (Q13a=3 OR 9) AND (Q14a =3 OR 9), I.E., DID NOT SEE CTC TV OR MAGAZINE ADS -> SKIP TO Q21

- 15) Since seeing the advertising, have you sought any additional information on travelling in Canada?

Yes.....1
 No.....2 ->SKIP TO Q17
 Don't Know.....9 ->SKIP TO Q17

- 16) Did you do any of the following as a result of seeing the advertising for Canada? **READ LIST. RECORD YES OR NO FOR EACH.**

	YES	NO
Called the free telephone number in the ad.....	1	2
Visited the internet site indicated in the ad.....	1	2
Visited other internet sites relating to Canada.....	1	2
Consulted a Canada travel guide.....	1	2
Talked to a travel agent about Canada.....	1	2
ASK IF (Q13a=1 OR 2)		
Called a tour operator shown in the tv ad (e.g., DerTour).....	1	2
ASK IF (Q14a=1 OR 2)		
Called a tour operator shown in the magazine ad (e.g., DerTour).....	1	2

- 17) Thinking back a few months to before you saw the advertising we just discussed, had you planned to take a trip to Canada? **DO NOT PROMPT. IF YES, ASK:** Were you definitely planning a trip to Canada or only considering it?

Yes, definitely planning1
 Yes, considering it.....2
 No, not planning.....3
 DK/NR9

18) And since seeing the advertising for Canada, have you taken or booked a trip to Canada?

Yes..... 1
No..... 2 ->SKIP TO Q21
Don't know 9 ->SKIP TO Q21

19) Did you purchase a package that included two or more travel services for a single price, for example, flight and accommodation, or hotel and entertainment?

Yes..... 1
No..... 2 ->SKIP TO Q21
Don't know 9 ->SKIP TO Q21

20) And did you purchase one of the packages shown...? **READ LIST. SINGLE RESPONSE.**

	YES	NO	DK
ASK IF (Q13a=1 OR 2): in the tv ad?.....	1	2	9
ASK IF (Q14a=1 OR 2): in the magazine ad?.....	1	2	9

ALL RESPONDENTS

21) How likely are you to visit Canada in the next twelve months? **READ LIST. SINGLE RESPONSE.**

Definitely..... 5 ->SKIP TO Q23
Very Likely 4 ->SKIP TO Q23
Somewhat Likely..... 3 ->SKIP TO Q23
Not Very Likely 2
Not at all Likely..... 1
DO NOT READ:
Don't Know..... 9 ->SKIP TO Q25

22) Why are you not likely to visit Canada? **DO NOT READ LIST. MULTIPLE RESPONSE.**
PROBE: Are there any other reasons?

Too expensive to go to Canada (in general).....	1
Airfare too expensive	2
Accommodations too expensive.....	3
Packages too expensive.....	4
Poor exchange rates.....	5
Too hard to get there	6
Too far to travel / flight too long.....	7
Too big/attractions too far apart.....	8
Poor weather/too cold/prefer warmer places.....	9
No beaches/beach resorts	10
Prefer more exotic places	11
Don't know enough about it.....	12
Nothing there that appeals to me.....	13
Nothing to see or do there	14
Nothing different or unique there.....	15
Not exciting / too boring	16
A place for older people.....	17
Other destinations I want to visit more	18
Been there before and want to go somewhere else.....	19
Been there before and didn't like it.....	20
Just went there.....	21
Poor economy/waiting for economy to improve.....	22
Worried about losing my job.....	23
Can't afford to travel/too many other expenses	24
Fear of flying.....	25
Fear of terrorism.....	26
Fear of war in Iraq.....	27
Don't want to be away from my family/home	28
Personal (illness / family problems/ pregnant/young children).....	29
Too busy/can't get away from work or school.....	30
Language barriers	32
Other (specify: _____).....	97
Don't Know.....	99

SKIP TO Q25

LIKELY TO VISIT CANADA

23a) If you were to take a future holiday trip to Canada, please tell me how likely you would be to take each of the following types of trips. Would you say that you are definitely, very likely, somewhat likely or not likely to take... **READ LIST. ROTATE ITEMS. RECORD ONE RESPONSE FOR EACH ITEM.**

	<i>Very Likely</i>	<i>Somewhat Likely</i>	<i>Not Likely</i>	<i>Don't Know</i>
A trip to a big city	3	2	1	9
A touring trip to a number of destinations	3	2	1	9
An outdoors adventure trip	3	2	1	9
A trip to enjoy nature	3	2	1	9
A culture or history trip	3	2	1	9
An aboriginal culture trip	3	2	1	9
A trip to enjoy winter sports and winter scenery	3	2	1	9

23b) And if you were to take a trip to Canada, how likely would you be to visit each of the following destinations – very likely, somewhat likely, or not likely? **READ LIST. ROTATE ITEMS.**

	<i>Very Likely</i>	<i>Somewhat Likely</i>	<i>Not Likely</i>	<i>Don't Know</i>
Ontario	3	2	1	9
Alberta	3	2	1	9
British Columbia	3	2	1	9
Northwest Territories	3	2	1	9
Canada's East Coast	3	2	1	9
New Brunswick	3	2	1	9
Newfoundland	3	2	1	9
Nova Scotia	3	2	1	9
Prince Edward Island	3	2	1	9

24) Now I would like to ask you what type of travel destination you consider Canada to be. How would you rate Canada as a place to go for each of the following: For each item, please tell me if you feel Canada is excellent, very good, good, fair or poor. **READ LIST. ROTATE ITEMS. REPEAT SCALE WHERE NECESSARY. RECORD ONE RESPONSE FOR EACH ITEM.**

	<i>Excellent</i>	<i>Very Good</i>	<i>Good</i>	<i>Fair</i>	<i>Poor</i>	<i>Don't Know</i>
Finding excitement and adventure	5	4	3	2	1	9
Having fun and being entertained	5	4	3	2	1	9
Experiencing history and culture	5	4	3	2	1	9
Learning and exploring	5	4	3	2	1	9
Resting and relaxing	5	4	3	2	1	9
Finding intimacy and romance	5	4	3	2	1	9
Being active	5	4	3	2	1	9
Connecting with nature	5	4	3	2	1	9
Enjoying the great outdoors	5	4	3	2	1	9
Enjoying the good life and being pampered	5	4	3	2	1	9
Experiencing cosmopolitan cities	5	4	3	2	1	9
Experiencing a popular, trendy place	5	4	3	2	1	9
Seeing something you've never seen before	5	4	3	2	1	9
Having lots of things to see and do	5	4	3	2	1	9
Getting value for your money	5	4	3	2	1	9
Creating once in a lifetime memories	5	4	3	2	1	9

ALL RESPONDENTS

DEMOGRAPHICS:

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

25) Do you have any close friends or relatives living in Canada at the present time?

- Yes.....1
- No.....2
- Don't know.....9

26) Including yourself, how many people are there in your household?

- _____ Person(s) -> **IF Q26=1, SKIP TO Q28**
- (99) Refused

27) How many are less than 18 years of age?

_____ Person(s)
(99) Refused

28) What is your marital status? **READ LIST. SINGLE RESPONSE.**

Married or living with someone 1
Separated 2
Single 3
Divorced 4
Widow / widower 5

DO NOT READ:

Refused 9

29) What is the highest level of educational qualifications that you have completed? **DO NOT READ. SINGLE RESPONSE.**

No qualifications 1 **SKIP TO Q31**
Primary school 2 **SKIP TO Q31**
Middle school 3 **SKIP TO Q31**
Trade school/high school without Abitur 4 **SKIP TO Q31**
High school with Abitur 5
Don't Know/Refused 9 **SKIP TO Q31**

30) Do you have a degree of a university or college?

Yes 1
No 2
Don't Know/Refused 9

31) Are you..... **(READ LIST)**

Working full-time (30+ hours per week) 1
Working part-time (8 to 29 hours per week) 2
Working in the home (i.e. housewife/husband) 3
Retired / pensioner 4
Unemployed 5
Student / in instruction 6

DO NOT READ:

Other (including disabled) 7
Refused 9

- 32) To ensure that we have a representative sample, could you tell me the occupation of the CHIEF WAGE EARNER of the household?
IF RETIRED, CODE 8 IN 32a AND ASK 32b... what was the occupation of the CHIEF WAGE EARNER just before retirement?
IF UNEMPLOYED, CODE 9 IN 32a, DETERMINE HOW LONG THEY WERE UNEMPLOYED FOR. IF LESS THAN 3 MONTHS, ASK 32c: What was the occupation of the CHIEF WAGE EARNER of the household at their last job? **IF MORE THAN 3 MONTHS, CODE 9 FOR 32c**

	<i>32a</i>	<i>32b</i>	<i>32c</i>
White-collar worker (employee)	1	1	1
Blue-collar worker (worker).....	2	2	2
Manager.....	3	3	3
Official	4	4	4
Self-employed	5	5	5
Student/ in instruction	6	N/A	6
Army / civil worker	7	7	7
Retired/pensioner	8	N/A	N/A
Other Non-Active (e.g., unemployed).....	9	9	9
Other.....	10	10	10
Don't Know/Refused	99	99	99

- 33) Which of the following categories best describes your average monthly household income in 2002 after taxes and social security contribution? Please include all wages, salaries, pensions and income from other sources.

1,800 – 2,300 Euros	1
2,300 – 2,800 Euros	2
2,800 – 3,300 Euros	3
3,300 – 3,800 Euros.....	4
3,800 – 4,300 Euros.....	5
4,300 Euros or over	6
DO NOT READ: Don't Know / Refused.....	99

***THESE ARE ALL THE QUESTIONS I HAVE.
 THANK YOU FOR YOUR COOPERATION.***