

RESEARCH

Australian Consumer Research 2002:

Part 2

Qualitative Report

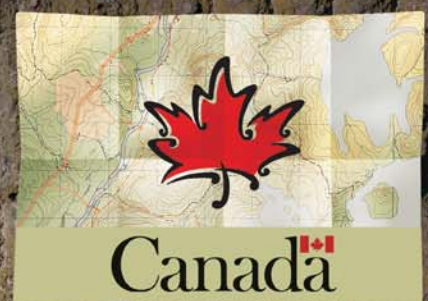
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**Australian Consumer Research 2002:
Part 2
Qualitative Report**

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Executive Summary

Following is a summary of the key findings from the qualitative component of consumer research conducted for the Canadian Tourism Commission (CTC). A total of 13 focus groups were conducted with a total of 107 participants from four of the major Australian cities.

What makes an overseas destination attractive?

In each group the following issues were mentioned as making an overseas destination attractive:

- scenery;
- local people;
- cultural differences; and
- somewhere that is generally different from Australia.

Barriers to overseas travel

Cost was the most frequently mentioned barrier to international travel. Among frequent travellers, work and/or family commitments were also sizeable barriers to travel.

Perceptions of Canada as a holiday destination

The research indicates that Canada's brand image amongst all Australian market segments is associated with friendly people, snow and skiing, mountains/the Rockies and the cold.

Those participants who had not visited Canada had very low awareness levels of Canada as a vacation destination. In general, participants assumed that Canada did not have places of historical or cultural interest. A small number of participants hadn't even realised that there were cities in Canada.

Almost all of those who had been to Canada were very enthusiastic about it as a place to visit. The destinations that were referred to most often were Victoria, Vancouver, Toronto, the Rockies, Banff and the Inside Passage. Several participants also mentioned how interesting they found the First Nation culture.

The main aspects of Canada that participants found attractive were:

- the wilderness;
- French Canada;
- scenic trips by train or boat;
- the people;
- the snow; and
- that it was clean, safe and easy.

When shown photos of Canada, those of older, European style buildings especially struck participants. Many had not realised that there were European influences in Canada or that there were 'old buildings' in Canada. This made Canada seem more appealing to participants across market segments.

There was a general perception among participants that Canada is not promoted enough as a tourist destination. Participants were virtually unanimous that Canada had a lot to offer and that the attractions should be promoted more, especially lesser known aspects like the French culture, the Native Americans and the European history.

Barriers to visiting Canada

The focus group research identified four main reasons why participants had never visited Canada or were unlikely to visit Canada for a holiday:

- perceptions of the distances involved;
- low awareness levels for Canada;
- it seemed too similar to Australia; and
- perceptions of cold weather.

Consumer preferences

Participants tended to value flexibility and a personal involvement in decision-making over cost savings they might make through booking a package.

Preferred activities varied across market segments, with City Resort and Touring participants valuing freedom to explore another country. Skiers wanted good snow, a diversity of runs, including long runs and good lifts.

With regard to accommodation, it seemed that there were two types of preferences; participants who wanted to stay somewhere 'clean and comfortable' and participants who wanted to stay somewhere 'a bit different'. Most skiers wanted to stay on the mountain and very few participants were interested in luxury accommodation.

Perceptions of price and value

None of the participants referred to Canada as a particularly expensive destination. There was a common perception that Canada was cheaper than both the United States and Europe.

1. Introduction

This report summarises findings from the qualitative component of consumer research conducted for the Canadian Tourism Commission (CTC). The Canadian Tourism Commission, in conjunction with Tourism British Columbia, the Ontario Marketing Partnership Corporation, the Alberta Economic Development and Air Canada commissioned Roy Morgan Research to undertake primary consumer research of the long-haul outbound travel market in Australia. The main purpose of this research was to identify key elements of long-haul travel behaviour in this market, which findings could be used to develop/influence advertising and marketing communication instruments (at the consumer and travel industry levels), as well as product packaging and development initiatives.

Please note that the findings detailed within this report are limited to those obtained from the qualitative component of the Australian Consumer Research program. In addition, further information obtained from other elements of the broader research program are detailed in:

- Australian Consumer Research – CATI Quantitative Report; and
- Australian Consumer Research – Results of the Holiday Tracking Survey



2. Methodology

Focus group discussions were held to collect in-depth data on perceptions and motivations of consumers. The focus groups were designed to provide information on the following issues:

- Travel motivations and future travel interests regarding Canada and the regions;
- Assessment of Canada, at the national and regional level, as a vacation destination;
- The barriers for Australians who are not interested in visiting Canada; and
- Perceptions of price/value issues related to Canadian tourism products at both a national and regional level.

Throughout August and September 2002, 13 focus groups were conducted with a total of 107 participants from four of the major Australian cities; four focus groups were held in Melbourne, five in Sydney, two in Brisbane and two in Perth.

Each group comprised consumers who had been on a long haul trip in the past 3 years or who intended to do so in the next 12 months:

- One group ('Travellers') comprised consumers who had visited Canada in the last three years;
- Two groups ('Intenders') comprised a mix of consumers who intended to travel in the next 12 months, including those who intend to visit Canada.
- Ten of the groups focussed upon the needs of consumers who were identified as belonging to one of CTC's five market segments, namely Soft Adventure, Touring, Winter Sports, History/Culture, or City Resort.

Consumers were identified as belonging to one of CTC's five market segments using data from the Roy Morgan Research platform on holiday behaviour and intention, activities while on a long haul holiday, general leisure/sport activities and attitudes. (See Appendix A for a full definition of each market segment.) The number of participants in each type of group and the location of the group is shown in Table 1 overleaf.

Table 1: Composition of focus groups

GROUP TYPE	LOCATION	NUMBER OF PARTICIPANTS
City Resort	Perth	8
City Resort	Sydney	7
History/Culture	Perth	8
History/Culture	Sydney	10
Intenders	Melbourne	8
Intenders	Sydney	10
Soft Adventure	Brisbane	8
Soft Adventure	Melbourne	9
Touring	Brisbane	8
Touring	Melbourne	7
Travellers	Sydney	9
Winter Sports	Sydney	4*
Winter Sports	Melbourne	11
TOTAL		107

Note: The small numbers attending the Winter Sports group in Sydney was due to a spate of unexpected last-minute cancellations.

2.1 Sample

Participants for twelve of the focus groups were recruited from our Single Source database. In addition, participants in the Travellers group from Sydney were supplemented using a focus group recruitment agency.

2.2 Issues covered in focus groups

Each group covered the same general format and included activities involving writing and visual aids. The first part of each group was concerned with the travel aspirations of participants and their perceptions of various countries as holiday destinations. Participants did not know at this stage that the research concerned Canada. The second part of the group focused on Canada, eliciting respondents' knowledge and perceptions of Canada as a vacation destination.

Different issues were emphasised depending on the nature of the group. For example, in the Winter Enthusiasts group, a substantial part of the discussion was devoted to experiences and preferences relating to skiing holidays; in the Travellers group, there was greater emphasis on perceptions of the prices in Canada.

Each focus group lasted for approximately 1½ hours and was recorded and transcribed.

3. Travel Intentions of Participants

Participants were asked about their plans for future overseas trips. As pointed out in the previous section, participants for the Intenders groups had been chosen on the basis that they intended to travel overseas in the next 12 months, while the Travellers group were selected on the basis that they had visited Canada in the previous three years. Participants in the market segment groups were selected on the basis of having travelled to a long haul destination in the previous 12 months or intending to do so in the next three years.

Almost all participants had definite plans to go overseas to a particular country (or countries) in the next year or so.

- In each group, there were one or two participants who had chosen their next overseas destination because they had relatives living there.
- There were twelve participants who were planning to go to Canada; five of these were going specifically to visit family and three mentioned skiing as either the principal or secondary reason for visiting Canada. Some planned to combine work with holidaying in Canada. For example:

“I am going in December to Canada for about five months, staying with friends. I have a few friends over there. Try and get a ski bum job for a while to pay my way skiing, paddling. I love kayaking, so paddling over there, and that is about it. I will try and make it as much of a holiday as possible but I will have to work somewhere along the way.” (Female, Winter Enthusiast)

When participants were asked about what they planned to do in the country or countries that they intended to visit, the most common response was “just hire a car and drive around”, “get a car and just go wherever we feel like”. This response was evident in each of the different market segments. Only five participants mentioned that they would book a package tour, four of which were from the City Resort segment.



4. Choice of Overseas Destination

4.1 What makes a destination attractive

At the very beginning of each focus group, participants were asked where they would holiday if they could have an all-expenses paid trip to the overseas destination of their choice. The most popular destination was Europe (42% of respondents), followed by Asia and Canada (13% and 12% of participants respectively). Just six participants wanted to go to the United States and five of them were from the Touring segment.

Participants in each group were then asked to brainstorm what makes an overseas destination attractive to them. In each group participants mentioned:

- scenery;
- the people;
- different culture; and
- somewhere that is different from Australia.

Other aspects that were less frequently mentioned as making an overseas destination attractive were safety, ease of travel, a favourable exchange rate, the food, the ability to travel by train and the climate.

Although scenery, the people, different culture and somewhere that is different from Australia were seen as attractive aspects across all groups. The meanings that participants gave to these aspects varied depending on both their goals for overseas travel and their activity preferences.

4.1.1 Goals for overseas travel

The common goals for overseas travel were either self-education (ranging from learning facts about a country to understanding a different culture to personal growth), relaxation, catching up with family who lived overseas or any combination of these. These goals did not align neatly with particular activity preferences. Across all groups, *most* participants wanted overseas travel to be a relaxing experience, but there were *some* participants (across market segments) who wanted overseas travel to be personally challenging rather than relaxing. In addition, there were participants in each group who mentioned the importance of learning about other cultures and their history.

4.1.2 Scenery

Beautiful scenery was mentioned as important in each group. Beautiful scenery enabled City Resort participants to relax:

*“I like to go to tropical islands and just the scenery and I just find that works magic”
(Female, City Resort)*

Soft Adventure participants were more inclined to link beautiful scenery to adventurous activities:

“Enjoying, not so much the scenery, but some of the activities that can relate to that scenery like tramping, mountaineering and fishing” (Male, Soft Adventure)

However, whereas some Soft Adventure participants undertook adventurous activities as a way of relaxing, others took them for personal growth reasons:

“Challenge, personal challenge, go somewhere difficult, different, get out of your comfort zone” (Male, Soft Adventure)

4.1.3 The people

Across all market segments, there were participants who said that friendly locals made a destination more attractive and relaxing:

“People are friendly in certain places and you seem to enjoy it more there than you do in others where you feel cold and no one wants to talk to you” (Male, Soft Adventure)

Other participants suggested that friendly locals made a destination attractive as it meant that they were more likely to be able to learn about the culture:

“See what they do, how they feel, how they see things” (Male, History/Culture)

4.1.4 “Things you don't have in your own back yard”

In all groups, ‘difference’ was mentioned as an important aspect of an overseas destination. Unless they were visiting friends or family, participants did not see the point of travelling to destinations similar to Australia. A different culture was seen as a particularly attractive feature of an overseas destination and in most groups, culture was rated as the *most important* factor that makes an overseas destination attractive. The term 'culture' was interpreted in a variety of ways. Some participants used the term 'culture' to refer to historical attractions, galleries and the like, whereas other participants used the term 'culture' to refer to lifestyle of local people.

The reasons for valuing a different culture also varied according to participants' goals for travel. Participants who just wanted to relax on an overseas holiday valued cultural difference as a break from the routine, enabling them to really feel like they were on holiday.

“Just get out of the routine you know seeing something different, a different way of living and thinking” (Female, City Resort)

“A break from the usual” (Female, Intender)

For participants who wanted overseas travel to be educational, cultural difference was an important aspect of the learning experience.

“My reason for travelling basically is to experience other cultures, other people and understand them” (Male, History/Culture)

Similarly while some people preferred to go to an English speaking country because of the ease of communicating, others preferred the challenge of trying to communicate in another language.

*“I prefer going to places where I don’t speak the language. I find it even more exciting, so different”
(Female, City Resort)*

4.2 Elements of an Unattractive Destination

After discussing what makes an overseas destination *attractive* to them, participants were asked to determine what would make an overseas destination *unattractive* to them.

- In all groups there were participants who would not visit a destination that was unsafe, either through risk of violence or disease.
- Participants in several groups (both City Resort groups, one of the Soft Adventure groups and one of the Winter Enthusiasts groups) mentioned obvious poverty.
- In five of the groups, excessive flight length was mentioned, including the amount of time spent in airports. For example:

“Flight length, anything that takes three changeovers and forty two hours to get there, I don’t want to do it” (Male, Intender)

Other destinations perceived to be unattractive were those that were “*too touristy*”, “*too commercial*” and “*look like everywhere else*”. In addition, unfavourable exchange rates, insurmountable language barriers and difficulties with transportation were also mentioned.

Within groups, participants were divided over these aspects. For example, some participants believed that the United States is too commercial whereas others disagreed. In relation to exchange rates, some participants suggested that they would not visit a destination with an unfavourable exchange rate. In contrast, some indicated that if you wanted to go to a particular place you would save appropriately.

As discussed in the previous section, some people embraced the challenge of trying to communicate in a language other than English.

“One of the fun things about travelling is going to a place and not being able to speak the same language and trying to communicate anyway” (Male, City Resort)

Others considered that there was a point at which an inability to speak the language became a barrier to touring the country.

“Language barrier, that you can turn up to a place and nobody is willing to help you and you can’t get your message across. Next thing you know you are stuck in a hotel for a week” (Male, Touring)

Similarly, while some participants liked to find their own way around a country, some participants did not want to visit a country that did not have good facilities for a tourist, particularly a good transport system.

4.3 Relative Merits of Various Overseas Destinations

In a focus group lasting 90 minutes, there was insufficient time to enter a detailed discussion regarding the relative merits of various overseas destinations. As an indicative way of examining perceptions of various destinations, participants were given a list of seven countries / regions and asked to write down the first three words they associated with each. At this stage, participants did not know that there was going to be a particular focus on Canada.

While it was difficult to discern many themes for the US, there were strong themes for each of the other countries. The most common words/themes are shown in Table 2.

Table 2: Key Perceptions of Various Overseas Destinations

US	GERMANY	FRANCE	CANADA	US	SE ASIA	SWITZERLAND
History	Beer	Food And Wine	Friendly People	New York	Food	Chocolate
Cold / Rainy	History	Art	<i>Cold</i>	Big/ Busy	Hot Weather	<i>Cold</i>
London	Scenery	Eiffel Tower/Parks	<i>Mountains/Rockies</i>	Varied	Culture	<i>Mountains/Scenery</i>
			<i>Snow / Skiing</i>			<i>Snow/Skiing</i>

Canada and Switzerland both evoked images of snow and skiing, mountains and the cold. Importantly, Canada was also associated with friendly people. As discussed in the previous section, friendly people were seen as an important aspect of making an overseas destination attractive. This suggests a positive way of promoting Canada as an alternative destination to places like Switzerland which also have mountains and good skiing.

One participant related how she was reluctant to go to Canada because she had been to Switzerland and loved it there. She thought that Canada would be just the same as Switzerland, based on impressions of mountains and snow and what she conceded was “ignorance”.

“I was wondering whether it was worth going, and whether we would just be seeing Switzerland again. We just came back and said 'Don't think that. It is different, it is beautiful. Switzerland is beautiful but this is too and it is different. It is well worth going'.” (Female, Traveller)

4.4 Barriers to Overseas Travel

Participants were asked about barriers to long-haul travel, and time constraints emerged as a major issue. For many, the distances involved meant that it wasn't worth going overseas for holidays of less than six weeks duration.

“I think that distance comes in with what you were saying about the length of time you are going because it costs you. Because we have so far to travel, it is simply not viable to go for the normal four weeks. If you are going to go that far you really want to fit in as much as you can, so you really want to stay longer. If you can't get holidays that makes it extremely difficult. You can't pack up and go. Well most people that I know can't pack up and go once a year for a month to the other side of the world.” (Female, Traveller)

Family commitments were also a frequently mentioned barrier to overseas travel, particularly for people with children. Some participants indicated that it was difficult to travel to long haul destinations with very young children or work in around the school requirements of older children.

“If you are travelling with young children you just try and pick the closest place because it can be very traumatic for the parents and everyone else on the plane” (Female, Intender)

Cost was also frequently mentioned as a barrier, but for those participants who loved travelling, it was work and/or family commitments that actually stopped them travelling overseas. A few participants also mentioned that they did not wish to travel overseas at the moment because of threats of war and terrorist attacks.



5. Brand Image of Canada

The previous section indicates that Canada's brand image amongst the Australian market is associated with friendly people, snow and skiing, mountains/the Rockies and the cold.

"I mean everyone knows scenery. Canada, you think scenery, big mountains but really you can't think of anything else" (Female, History/Culture)

When asked to provide impressions of Canada, participants in several groups also mentioned ice hockey and wildlife, such as bears, moose, whales and polar bears.

One participant who had been to Canada associated it with food:

"I am inclined to think of salmon when I think of Canada and think of salmon that big on a plate [indicates size with hands] and the food and the Alaskan crabs and some of the food is just incredible" (History/Culture)

Participants who had not been to Canada perceived it as a place to visit purely for the scenery, the snow or the wildlife. Canada was not considered a cultural destination:

"You don't associate culture with Canada" (Male, History / Culture)

"Basically mountains and a couple of shacks. We don't think of it as a cultural place" (Female, Soft Adventure)

5.1 Knowledge of Canada as a vacation destination

"I don't know much about Canada other than it has a lot of trees and stuff" (Female, Touring)

Excluding those participants who had visited Canada (one History / Culture participant had visited on numerous occasions), knowledge levels were very low. Several participants claimed that they did not know enough about Canada to consider it as a holiday destination. Although a few participants had heard of particular tours or attractions, they were unable to provide specific details.

"I didn't really think about it that much because in today's media you don't really see much about Canada, like you see it in movies and stuff but you don't really see it. Like you don't see travelling stuff on TV about 'go to Canada'" (Female, Soft Adventure)

Participants were shown a series of ten photos and asked to name the country where they thought the photo was taken. Table 3 below lists the proportion of respondents identifying the image as one taken in Canada, as well as the proportion who found the image appealing (refer to Appendix B for photo reproductions). Please note that at the point of presentation, the session had only focussed on general overseas travel.

Table 3: Recognition of Canadian Images

	% IDENTIFIED IMAGE AS FROM CANADA	% FOUND IMAGE APPEALING
1 Rockies Moraine Lake	63%	80%
2 CN Tower, Toronto	34%	21%
3 Parliament Building, Victoria	14%	67%
4 Whales, Vancouver Island, BC	42%	74%
5 Quebec City	25%	79%
6 City waterfront, Vancouver	20%	24%
7 First Nations people in Saskatchewan	40%	53%
8 Dog sledding in the Yukon	45%	53%
9 Niagara Falls - Horseshoe falls	63%	80%
10 Banff (with Banff Springs Hotel in foreground)	35%	94%

More than half of participants correctly identified Rockies Moraine Lake as from Canada and identified the photo of Niagara Falls as from within North America. However, more than 80% of respondents thought that the photo of Parliament Building, Victoria was taken in Europe (in several groups participants thought the picture was taken in Holland because of the tulips). Similarly, 60% of respondents thought the images of Quebec City and Banff were from Europe.

5.2 Attractiveness of Canada as a vacation destination

Before respondents were told where the photos had been taken, they were asked to indicate the images that were appealing in the context of holiday travel. The image of Banff Springs Hotel was by far the most popular, appealing to 94% of all participants and more than two thirds of participants in each group. The images of Niagara Falls, Quebec City and Rockies Moraine Lake were also popular with 80% of participants overall. However, the image of Rockies Moraine Lake only appealed to one in four from the Touring Enthusiasts segment.

Previous visitors were very enthusiastic about Canada, and tended to speak in superlatives about their experiences: “*absolutely loved it*”, “*absolutely fantastic*”, “*brilliant*”. The destinations that were mentioned most often were Victoria, Vancouver, Toronto, the Rockies, Banff, and Inside Passage. Several participants also mentioned how interesting they found First Nation culture.

The main aspects of Canada that participants found attractive were:

- the wilderness;
- French Canada;
- scenic trips by train or boat;
- the people;
- the snow; and
- that it was clean, safe and easy.

5.2.1 Wilderness

Recurring phrases when participants spoke about the attractive features of Canada included the “magnificent views”, “beautiful scenery”, and the “untouched wilderness”. Many participants who had never been to Canada mentioned the Rocky Mountains and Niagara Falls. The wildlife was also frequently mentioned.

“I think what I find most attractive is the nature. There is so much to see. The wolves, the bears and the nature would be the first reason I would go there.” (Female, City Resort)

‘The wildlife in Canada, like the birds, it is not just the variety but the sheer numbers. If you go out onto the prairie in the spring or the autumn when the wild fowl are migrating, they just cover the sky almost in places. (Male, Soft Adventure)

5.2.2 French Canada

Participants were far more aware of the West Coast of Canada relative to the East Coast, with some participants unaware that part of Canada was French speaking. Several participants mentioned that they were attracted to French Canada, and particularly Quebec, because of the “French influence” in the culture.

“We have almost all talked about the West Coast. I don't think we have been sold enough the Canadian-French difference, and the interesting historical and political background that it has had and the things that it has left as its legacy.’ (Female, History/Culture)

5.2.3 Scenic trips by train or boat

Participants who had been on scenic trains or boat cruises in Canada were very positive about their experiences. A number who had not been to Canada were also attracted to the idea of the “train that goes through the Rockies” or “the cruises through the icebergs”. Among those who had not visited Canada, Soft Adventure participants seemed to know the most about what scenic trips were available.

5.2.4 The people - 'Canadians are very, very friendly'

As discussed in Section 3, friendly locals were perceived to make a destination attractive across all market segments. Regardless of whether or not they had been to Canada, participants in all groups told of how “warm and friendly” Canadian people are.

Some participants spoke favourably of Canadians as being similar to Australians and very different from Americans. For example:

“I think they have a similar type of outlook to life as us.” (Female, History/Culture)

“The people are very hospitable. They are not over the top. There is a very big difference between them and the Americans.” (Male, City Resort)

5.2.5 The snow

Those who had skied in Canada couldn't speak highly enough about the snow. One Winter Enthusiast who had skied in Canada “*would always go to Canada*” rather than any other overseas destination to ski. He thought that the snow in Canada was:

“Absolutely phenomenal, knee deep. It is great. I mean you have got a five-metre base to work from whereas here in Australia you only have a shade over a metre. It is two totally different worlds in terms of skiing. Lots of runs, it is great.”

5.2.6 Easy, safe and clean

Those who had been to Canada described it as an “*easy place to visit*”, an “*easy country to travel in*”, and safe and comfortable.

“The other thing about Canada - it is very safe. You feel very comfortable there.” (Male, Winter Enthusiast)

“I go there quite often and I find it is just comfortable like being in Australia.” (Female, Winter Enthusiast)

Several participants mentioned that Canada was a very clean place. For example, from a participant who had visited Canada:

“It is vast and the air just smells fresh and pristine and clean. From Toronto if you go to CN Tower and look down, you can see America on the other side and there is this brown haze of America but Canada is all clean and fresh air.” (Male, Traveller)

5.2.7 The cities

Opinion was quite divided about Canadian cities. In general, people were very positive about Vancouver, considering it to be “*very vibrant and alive*”, and a place they had enjoyed or would like to visit. However, some negative comments were made about Toronto and Montreal as holiday destinations.

5.3 Reaction to Photos of Canada

In each group, participants were shown a range of photos of Canada. Almost all of those participants who had not been to Canada before were very impressed by these photos and some of the participants left the focus group keen to visit Canada.

“They whetted the appetite” (Female, City Resort).

As mentioned, participants who had not been to Canada generally assumed that it had little to offer culturally or historically. The photos dramatically altered the perceptions of these participants.

“It surprised me. I didn't get any of them right - none for Canada” (Male, Touring)

“You see a bit of the entire world in the one country” (Male, Soft Adventure)

“It showed a different side to what I would have thought” (Male, City Resort)

In particular, participants were struck by the photos of older, European style buildings, and had not realised the European influences in Canada. A number of comments are provided below illustrating the positive impact of these images on participants across market segments.

“It seems more historical. I love older style buildings and one of the perceptions of Canada is, I guess, the modern part of things, more like America. Looking at that it is not so” (Female, City Resort)

“Seeing that range of photographs you had there was quite surprising. It makes it more appealing thinking that there is that sort of rich culture.” (Female, Winter Enthusiast)

“It gives it some substance to think that they have got big old buildings like that. It means there must have been something going on there for a few hundred years. It gives it an extra dimension other than the whales and the trees and the mountains.” (Male, City Resort)

“Some of those buildings and scenes and panoramas and so forth you would think were in Europe and other parts of the world but you get it all in Canada by the sound of it.” (Male, Soft Adventure)

“I was struck by the wilderness and the European ones that I thought were in Northern Europe. I was amazed that they were (in Canada). I never thought of Canada like that. They have stuck in my mind.” (Female, Touring)

“My whole perception has been outdoors. I mean the cities don't surprise me, I knew they had cities, but I really didn't take it to be these grand, historic, very European style buildings.” (Female, Winter Enthusiast)

“I think it broadens your view. I think you tend to look at Canada as a bit like America and say 'Look they're similar', but you don't realise how diverse the whole place is and what it has got. I think that is an eye-opener to me because I would have taken a lot of those things as being from parts of Europe.” (Male, History/Culture)

“It comes across as being a little more cultural than I thought.” (Female, Intender)

5.4 Promotion of Canada

There was a general perception among participants that Canada is not promoted enough as a tourist destination. Participants were virtually unanimous that Canada had a lot to offer and these attractions should be promoted more, especially lesser known aspects like the French culture, the Native Americans and the European history.



6. Barriers to Visiting Canada

The focus group research identified four main reasons why participants had never visited Canada or were unlikely to visit Canada for a holiday:

- travelling distances and associated costs (both to and within the destination);
- low awareness of Canada;
- perceived similarities with Australia; and
- perceptions of cold weather.

6.1 Travelling Distances and Associated Costs

Travelling distances between Australia and Canada were perceived by some participants as too distant for a shorter international holiday. In addition, the distances involved in travelling around Canada were daunting to some:

“It is too big” (Male, City Resort)

“I just get the impression that everything is too far apart and whilst it looks pretty, there are plenty of places that look pretty, and it is just not on my list of places to go.” (Male, History/Culture)

Some participants suggested that they would visit New Zealand rather than Canada. These respondents thought New Zealand offered comparable scenery and skiing, with the advantage of close proximity to Australia.

“I really have no desire to go to Canada. A lot of the things we saw in those pictures you could see here or in New Zealand or somewhere close by. The travel and the distance is a problem.” (Male, Touring)

“New Zealand obviously offers proximity which Canada doesn’t. I mean it is a big deal to go to Canada whereas New Zealand is just a hop, skip and a jump away.” (Female, Winter Enthusiast)

A few other participants compared the cost of visiting either Canada or Europe, and suggested that on the basis of equivalent prices they would prefer Europe:

“London, Paris, Venice, Florence, India, are places I would put ahead of Canada. It is not so much that I would dislike Canada, I would enjoy it I am sure. The scenery would be fantastic. It is just if you said to me life is short, time is limited where would I rather go, the cost of going to Canada is the same cost as going to Europe or thereabouts.” (Male, History/Culture)

6.2 Low awareness of Canada

As shown in the previous section, many participants had very little knowledge about Canadian travel products. Consequently, they had never considered it as a potential destination.

“I haven't heard a lot about Canada. When we went to school we knew a lot about America, England, and Europe. Canada doesn't come on my radar screen and probably for that reason I have to say I have no desire to go there.” (Male, Touring)

“To tell you the truth I don't really know much about Canada, I know that it can be very cold at times and Niagara Falls would be good to see, the southern section. But no, I don't know too much.” (Male, Touring)

“If someone said 'Canada' I just thought 'city'. Obviously, I knew skiing and mountains and stuff but I just didn't think it was a really adventurous place to go.” (Female, Intender)

At the end of a number of the sessions there were participants who indicated they would now consider Canada as an overseas destination.

“I think Canada has just got so much more to offer than I actually realised” (Female, Intender)

6.3 Similarities with Australia

As discussed in Section 4, an important element of attractive overseas destinations were various points of difference from Australia.

Some participants thought that the scenery in Canada was similar to what could be found in Australia. For example:

“I wouldn't want to spend money to go all the way to Canada which is so similar to home, except for the cold weather and some of the natural beauty that you have up there. But even Tasmania is beautiful, you have beautiful pictures like that. I just don't think it is worth the long plane ride, the time, the expense.” (Male, Touring)

Many participants asserted that Canada shared cultural similarities with Australia, therefore diminishing the appeal of Canada as a destination.

“It has never really been on the top of my list, only because I feel like I would be just going somewhere that is similar to where I live. I am not an expert on Canada but just from what I have heard, I just feel like I was going back to Sydney. I want to go somewhere and experience different things, not just go to another city.” (Female, Intender)

“I think the downside to Canada is that it is too similar to Australia in terms of cultural things. I don't think there is enough difference, if you are looking for a holiday that has a cultural difference.” (Female, Traveller)

Not everybody agreed that Canada was culturally similar to Australia. Those with higher awareness of Canada pointed out that French Canada was a completely different cultural experience, as was the North American Indian culture.

6.4 Cold Weather

In all but one focus group, there were participants who were put off going to Canada because they believed that it would be too cold. The following comments are indicative of these participants' attitudes:

“The only problem I have with Canada is the weather because cold weather and I do not get on at all.” (Male, History/Culture)

“I just hate the cold and I don't really want to go anywhere where it is cold.” (Female, Soft Adventure)

Some participants had the perception that during the winter months it was too cold to do anything but ski.

“Unless you were a ski nut you wouldn't go there in the middle of winter.” (Male, City Resort)

“Everybody goes to bed at 8 o'clock - it is too cold.” (Male, City Resort)

“My perception is that, say I was going in winter, I would go skiing. But I wouldn't want to go on a holiday for four weeks skiing. To go that far, I would need to go for a fairly lengthy time. Unlike Europe what else am I doing over there? In Europe you have got culture and buildings and everything else to see. But in Canada I get the perception it is really cold. If you're not skiing, there is not a lot more to do.” (Female, Winter Enthusiast)

However, it was those who had not visited Canada who were put off by the cold. Those who had been to Canada did not find weather to be an issue.

“I knew it was going to be cold but it wasn't as cold as I thought it would be. You had big log fires and things like that. And the cafes and the restaurants are all set up for it and the libraries and things like that, the bookstores and the shopping malls, they are built for a cold climate. It is brilliantly done, really brilliantly done.” (Female, History/Culture)

“In spring or autumn you get snow capped mountains but then it is not really cold unless you get right up the top of the mountain.” (Male, City Resort)



7. Consumer Preferences

7.1 Activities and Destinations According To Market Segment

Consumers were identified as belonging to one of five market segments using data from Roy Morgan Single Source. The segments were based on an array of information, including holiday behaviour and intentions, activities undertaken on holidays of 3 nights or more, leisure activities, sports participation and attitudes. Appendix A provides further information on the exact definition used for each market segment.

Please note that the criteria used to segment participants were not mutually exclusive. The criteria for segmentation used within the context of this report differ substantially from both the product-based and motivational segmentation detailed in the ‘Australian Consumer Research – CATI Quantitative Report’. The approach used herein provides a basis for product positioning and communications strategies founded on consumer perceptions and behaviour outside the scope of holiday travel.

7.1.1 History/Culture

Participants in these groups shared a universal interest in history and culture. This was expressed in a variety of ways, such as visiting museums and galleries:

“We always go to museums. Everywhere we go we spend all day - 8.30 in the morning through to 5 in the evening - and we have done most.” (Female, History/Culture)

Others preferred to absorb the living culture of the place, as exemplified by the following statement:

“My attitude when I travel, whether in Prague, but the same as in Montreal, I am just standing there and I feel a part of the crowd, the city, the urban environment” (Male, History/Culture)

In general, rather than engaging in particular activities, this segment preferred to interact and experience the local culture. There was high value placed on learning and unplanned experiences that produced lasting memories.

“The only way to learn the culture is to get out of the city centre into the provinces” (Male, History/culture)

“I really like the excitement of going to a country and looking for things that you don't know - no one knows.” (Male, History/culture)

7.1.2 Soft Adventure

The criteria for definition of this market segment were broad, and included those who enjoyed an active holiday on their last trip of 3 nights or more (ranging from bushwalking to abseiling) or those who participated in selected sports and recreational activities.

This group was quite diverse, and included those whose idea of a good holiday was “*sunbaking and doing nothing around the pool*” in a natural setting. A number mentioned historical attractions and cultural events and several wanted to experience the culture in a similar vein to some of the history/culture participants:

“I take photos, I taste wine, I listen to music and I meet people. I watch people cook and taste food. It is completely hedonistic - it has to be an experience everyday.” (Female, Soft Adventure)

7.1.3 Touring

There was a diverse array of activity preferences amongst Touring participants. Several participants in each of these groups were quite adventurous, enjoying active sports, such as skiing, white water rafting, and scuba diving when overseas. In one instance, a female participant had hired a canoe and camped for a week on a solitary island in a river.

There were also participants from this segment who preferred more sedate activities. For example, one participant enjoyed:

“Going to scientific museums such as at Washington, all the things you can see there, playing golf in Florida, looking at the castles and the cathedrals” (Male, Touring)

However, whether it was engaging in adventurous activities or visiting museums, a common thread across participants in this segment was the idea of exploring in a new place. Several participants also mentioned the importance of making an effort to “*get off the beaten track*”. Statements such as the following were common:

“I like to explore and like being by myself and just look around other things I haven't done before” (Male, Touring)

In addition, the ability to make travel decisions according to the moment was important:

“I like to just get up each day and decide what to do that day and just go exploring.” (Male, Touring)

“I think for me it is something that is relatively spontaneous. If I found out about that canoeing thing and somebody said to me ‘Hey this is really good’; I would like to do it. But I wouldn't plan those sort of things - ‘I am going to do this then and this and this’ because to me it loses that spontaneous aspect to it. I just like things to sort of come up and go and do them and think ‘Hey that was really good’.” (Female, Touring)

Similarly for those participants interested in guided tours or excursions, the flexibility to decide at the time was important. For example:

“I really like just walking around towns, and I have discovered since then I do like going on a tour when you get there. You know, like you can do your tour of a place that you don’t know much about to say ‘I will pay for a guided tour of this’.” (Male, Touring)

Only one Touring participant preferred a more structured framework:

“I like it pretty structured. I like to go on something and see the great buildings or the great gardens of the world, something that has a theme to it, but then have a couple of days to yourself. I would probably just do it through a group of twenty or thirty people with the same interest.” (Female, Touring)

7.1.4 Winter Enthusiasts

Based on the low incidence of skiing in the Australian market, the definition of Winter Enthusiasts was quite inclusive. It included those who participated in skiing, snowboarding, or ice skating on a regular or occasional basis, as well as those who had been skiing or snowboarding on a recent holiday.

All participants had been skiing overseas and between them, Winter Enthusiasts had been skiing in Canada, Germany, Switzerland, United States, France, New Zealand, Turkey, Italy, Austria, Denmark, and Chile. In both groups, all did downhill skiing and approximately half also did cross country skiing. Other activities that a small number of participants were involved in were snow shooting and tobogganing.

At least half of the participants usually skied with children and several went skiing with particular ski friends. For example:

“We only catch up with people once a year and we go either locally or every second year to Canada and we go with the same people.” (Winter Enthusiast)

Almost all participants were ‘serious’ skiers (*“You have got to be there first lift and get off at 4 o’clock with the people I go with”*) and considered the actual skiing experience to be more important than accommodation or entertainment. Most participants wanted good snow, a diversity of runs, including long runs and good lifts.

Other key points emerging for this segment included:

- All those with children wanted ski school for children.
- Most participants preferred basic, on-mountain accommodation, provided it was warm and had a drying room. For example:

“I think it is very important to stay on the mountain. I think that is the thing against Banff, is that you have to catch that bus at 8 o’clock in the morning and then you are stuck up there - you can’t go back.” (Winter Enthusiast)

- Only one participant mentioned that she wanted a certain degree of luxury in accommodation (a sauna and a spa pool). This participant did not feel that she needed to stay on the mountain and would not go overseas exclusively for a skiing holiday.
- Several participants mentioned that they preferred to purchase meals so that they didn’t have to worry about cooking.

-
- For just two of the participants, both from Sydney, ‘after hours’ activities were very important. One of these participants had been to Canada and found excellent after hours activities:

“In Canada it depends. If you want to go out and have a big night it is very easy to do that. There are heaps of bars around, there is plenty of nightlife there if you know where to look. If you don't want it, it is very easy to distance yourself from it and relax and recharge yourself for the next day.” (Winter Enthusiast)

Most Winter Enthusiast participants were also interested in active pursuits such as bush walking and nature-related activities such as whale watching.

7.1.5 City Resort

It is difficult to generalise about the activity preferences of this market segment, as it was primarily defined by activities undertaken on recent holidays. This behaviour-based approach utilises recent trips that may not represent typical travel behaviour. This was borne out by comments made by some participants during the sessions.

For example, after seeing the first set of photos, one participant distinguished between shorter overseas trips where there are time constraints and the purpose is to fully relax and longer overseas trips where the purpose is to experience another country:

“It depends on what sort of holiday you want. If you want a relaxing holiday or you want to go on. If you are going on a sightseeing tour to see the rest of the world then I would love to see everything that you have shown. But if you have only got x amount of weeks a year and you are working full time, I need to go somewhere where I can sit and do nothing for as long as possible.” (Female, City Resort)

In general, participants in this segment did not express specific preferences for the types of activities while on an overseas holiday. Several were quite interested in shopping, and some were interested in going to galleries and places of historical interest. Most wanted “to get out amongst it and enjoy the people”, and explore by car or on foot. A number also enjoyed going on boat cruises and train trips.

Like the Touring segment, City Resort participants valued finding interesting places that were off the tourist map:

“The best holidays are the ones where you go to different places and accidentally find places.” (Male, City Resort)

This segment were the most likely to book their transport and accommodation in advance, but still expressed a preference for flexibility when planning activities:

“You’d like to be looked after by the airline company and your travel arrangements and where you stay, but as far as what you do that can be anything really.” (Male, City Resort)

7.2 Accommodation Preferences

Across all the market segments, participants preferred modest accommodation and were typically disinterested in luxury hotels, including those from the City Resort segment. The following exchange expressed the sentiment of most City Resort participants:

Female1: There is no personality in big hotels....

Male1: Yeah you could be anywhere if you're in a Hilton. You could be in Sydney or you could be.

Male2: There is no difference.

Male1: In Paris or anywhere.

Female1: And also the cost of five star... I would rather spend it on a three star and spend the rest of the money shopping or sightseeing.

The most important aspect of accommodation for the City Resort segment was a central location allowing ease of access to attractions, restaurants and the like.

Across market segments, it seemed that there were two types of participant with regard to accommodation preferences: participants who wanted to stay somewhere 'clean and comfortable' and participants who wanted to stay somewhere 'a bit different'.

"If I have money left over I will stay in a five star hotel for the last couple of nights" (Male, Intender)

7.2.1 'Clean and comfortable' accommodation

The following statement typified the attitude of respondents:

"I wouldn't spend a lot of money, as long as it is clean and comfortable. I would rather spend my money doing something else. Going out to restaurants while you are there, not paying a heap just to sleep and put your head down. As long as it is clean and reasonably comfortable." (Male, Touring)

For some participants, somewhere 'clean and comfortable' was a three star hotel, and some of these participants expressed a preference for chain hotels on the basis of minimum standards and pre-paid vouchers / loyalty schemes. However, within each market segment there were participants for whom a youth hostel or an on-site caravan was sufficient.

7.2.2 Something 'a bit different'

Bed and Breakfasts were attractive to participants who regarded them as being 'a bit different' from the standard hotel or motel. For example:

"A lot of the places, the B&Bs we choose to stay in are usually at some historical vicinity. So there is always the history of the house that you are staying in and that makes it a bit more interesting." (Female, Touring)

7.3 Eating

With regard to eating, across market segments, participants either thought that eating out was “*part of the holiday*” or else they liked to go to the local shops and buy things to cook.

“I tend to go to a city and lease out a place where I can cook for a week or two and I can go to the supermarket and buy some food and cook it myself.” (Male, City Resort)

7.4 Transport Within the Destination

Across all groups, a number of participants believed that hiring a car would be the best way of getting around Canada.

“I would just start on one side and buy a car or hire a car and just drive, just take as long as I want.” (Male, Intender)

In all groups there were participants who preferred train travel, suggesting that it was more relaxing than driving, particularly over long distances.

“The good thing about the train is you can travel those large distances, watch some scenery but you know sleep or whatever. If you're driving, you don't.” (Female, Touring)

“In Canada, I have the image of very large distances and I wouldn't like to spend my time driving those distances. I would rather travel some other way.” (Male, Touring)

Many of those who thought that driving around Canada would be the best way of getting around were also interested in undertaking scenic train and boat trips.

7.5 Organising and Booking

The most frequently cited sources of travel information included friends and family, TV travel shows, and books (especially the Lonely Planet guides). In all groups some participants researched potential destinations on the Internet. Most participants preferred to book through a travel agent, especially any accommodation bookings, while a few relied exclusively on the travel agent. There was confidence that travel agents knew the best deals and could give good advice about which hotels had a central location. For example:

“You know, this hotel looks very nice in this brochure but I can tell you that it is ten miles out of town.” (Female, History/Culture)

However, some participants were wary of booking accommodation through travel agents:

“I hate the places travel agents put you into - they're horrible” (Female, Touring)

“And expensive” (Male, Touring)

Very few participants were interested in purchasing a package tour in Canada. Several participants reported negative experiences in other countries:

“Compulsory three quarter of an hour stops at places we weren't the slightest bit interested in and all they wanted us to do was to buy something” (Female, History/Culture)

Across market segments, participants tended to value flexibility over any potential cost savings they might make through booking a package. For example:

“I realise it would probably be cheaper to book accommodation through a travel agent at the same time, like in the package thing. But I sort of like a bit more flexibility in case something comes up or you want to go here or there or hook up with those friends or whatever instead. If I need it I will probably just do it over there, even though I am paying a bit more” (Female, Winter Enthusiast)

Male1: You turn up at some place and say this is somewhere I have never seen before, I am going to stay here an extra day or two.

Male2: Well you've got the flexibility haven't you?

Male1: And you get to a place and say I don't like this place so you move on. So you do need that flexibility.

Female1: You move on, you have that freedom. I mean it is all about freedom too. Our life is so full of obligations you need that freedom. (City Resort)

“I go by the seat of my pants. Just pick a destination, somewhere that interests me, get a flight. And when I get there that is when I start ‘Okay, What do I want to do now? I have got to find accommodation’. Go find accommodation, and then just go from there.” (Male, Touring)

“As long as I know where I am flying into and where I am flying out, then I just make it up” (Female, Touring)

Similarly, very few participants preferred to have all of their transport organised for them before arriving at their destination.



8. Perceptions of price and value

None of the participants referred to Canada as a particularly expensive destination. There was a common perception that Canada was cheaper than both the United States and Europe.

“It is probably about three times cheaper than going to Europe. Europe is so expensive.” (Female, Touring)

Only a few participants knew the current exchange rate between Australia and Canada. When told what it was, participants tended to be surprised, being familiar with the less favourable Australian-United States exchange rate.

8.1 Accommodation and Food

There was a common perception that food in Canada was better than food in the United States. However, amongst the Travellers group, there was a division between those who thought that Canada had very good food and those who thought that it was difficult to find options other than boring, expensive food from chains. Travellers generally agreed that accommodation was cheaper in Canada than Australia

8.2 Transport

Although a few of the participants who had been to Canada had found the bus system confusing and the train system limited, most tended to be very positive about transport options within Canada. A participant who had travelled from Vancouver by public transport, booking transport as he needed, said the experience was *“terrific, very efficient, very reliable. We had trains and buses and ferries and it was great - very clean, very reliable, very reasonable”*

Participants recounted with enthusiasm the details of bus, train and boat trips that they had enjoyed when in Canada:

“It only cost us something like sixty dollars for the two of us to get from Banff to Jasper and back through to Vancouver and it was two full days bus trip including a tour. It was amazing.” (Female, Traveller)

“It was fantastic, we went up the Inside Passage on a cruise trip and it was very reasonable because the airfare was included. That was phenomenal.” (Female, History/Culture)

One participant who wanted to travel around Canada by boat, train and bus had the impression that it would not be cheap but would be worth the money. He added:

“What I have found of Canadian people, they’re pretty honest as far as giving you a fair deal is concerned.” (Male, Soft Adventure)

8.3 Skiing

The costs of a skiing holiday in Canada, including accommodation and lift tickets, were considered to be reasonable, both by those who had been there and those who hadn't. However, Banff was mentioned in several groups as being particularly expensive and commercial.

“With any place like Banff, the places that are really well known become so commercialised and so expensive. I think the first tour driver told us that Banff stands for Be Aware Nothing's For Free. (Female, Traveller)

The following statement brought agreement from other participants:

'We were much more impressed with Jasper than we were with Banff for that reason. Banff was just so touristy and commercialised.' (Female, Traveller)

In general, however, skiing in Canada was considered to be good value for money. A common theme amongst skiing enthusiasts was that unlike in Australia, you were guaranteed good snow in Canada.

“It is not too bad because you are getting a lot more out of your dollar, a bit more bang for your buck. I mean if you go to Perisher or Thredbo (Australian resorts) you are paying that much money for a ski lift. You have to make sure you get it on a really good weekend to make it worthwhile. It is all up to the day, whereas Canada you can pretty much bet that any day you go up to the mountains you are going to get a relatively good day skiing. That is my experience. Through my experience it is far more cost effective or there is more of a cost benefit to take a holiday over there. I would be happier paying the money over there to ski everyday than what I would here in Australia.” (Male, Winter Enthusiast)

“You drive down there (in Australia), six hours in a car, and maybe you will get some good snow. Whereas you spend a little bit more time on a plane, three times as much time on a plane and you know you are going to enjoy yourself. Obviously you won't go just for a weekend but you know you will have a challenge in terms of skiing. You are away from home so it is a lovely holiday and you can have a bit of a blast and party as well if you want.” (Male, Winter Enthusiast)

One participant estimated that the costs of skiing in Canada (excluding airfare) were similar to those in Australia:

“Last trip it worked out about the same as a non-connected trip up to Hotham or Falls Creek. It was about the same, plus the airfare of course, but the trip itself was about the same cost, accommodation about the same cost.” (Winter Enthusiast)

In contrast, the costs of skiing in Europe were considered to be astronomical. Despite this, some participants believed that a skiing holiday in Europe represented better value because of other attractions and places of interest. These participants were not convinced that there was anything else to do but ski in Canada.

New Zealand was also rated as having very good snow and slopes. For some participants, the cost of skiing in Canada compared unfavourably to the cost of skiing in New Zealand:

“That is the big difference. You can go to NZ and you can ski so cheaply it is unbelievable and it is really worth getting a package. It is one of the places where you think it is worth getting an airfare and accommodation package for NZ. For fifteen hundred dollars, you can ski for seven or eight days with lift tickets and the lot. It is great, and it is a big jump to Canada.” (Male, Winter Enthusiast)

9. Airlines

9.1 Awareness of Airlines Servicing Canada

Those who had been to Canada clearly recalled the airlines that they had used. In general, however, there was only a vague idea of the airlines servicing Canada from Australia, with Qantas and Air Canada the most frequently mentioned. A number of participants were Qantas frequent flyer members, and therefore always tried to fly Qantas.

The following quote gives an indication of the low level of awareness of airlines flying from Australia to Canada.

“Is there Air Canada? I think there might be.” (Female, Winter Enthusiast)

In a History/Culture group there was a short exchange about the airlines in Canada.

Male1: There is something called Canada 3000 but I don't know whether....

Female1: I think they went broke.

Male2: And has Air Canada gone broke too?

Female1: Maybe they joined forces, somebody joined forces in Canada.

Male3: Haven't they lost three airlines in the last three years?

Even those participants who had flown Air Canada thought that the airline kept a very low profile in Australia. As well as having low awareness of airlines servicing North America, participants from Brisbane and Perth were unsure whether direct flights were available from Brisbane and Perth or whether connecting flights to Sydney were required.

After being told that Air Canada goes to Canada from Australia via Hawaii, quite a few participants were interested in the idea of a stopover in Hawaii. For example:

“Two attractive things for Canada for Australians: the exchange rate and going through Hawaii. I think that would be really attractive” (Female, Touring)

“It would make an interesting stopover. I thought you'd have to go somewhere in America and then jump over to Canada.” (Female, Touring)

9.2 Experiences of Air Canada

Only one participant had a strong view on Air Canada:

'Well I have been on Air Canada and I would never go on them again, seriously unimpressed. The girls all stood down the back yapping away and you could press the bell for a cup of tea or something and absolutely nothing happened. You just had to stick your foot out when one of them came past.'
(Female, City Resort)



Appendix A: Definition of Market Segments

All participants identified as belonging to a CTC market segment met the following travel criteria:

- Travelled on a long trip (3+ nights) in last 12 months; AND
- Had travelled to a long haul destination in last 12 months OR intended to do so in next 3 years

Additional criteria for each market segment are detailed below.

HISTORY/CULTURE

HOLIDAY ACTIVITIES (LAST LONG TRIP)

Participated in at least one of the following activities on last long (3+ nights) holiday:

- Musical performances/ concerts
- Theatre going
- Arts Festival, Cultural Event
- Museums
- Art Galleries
- Historical places

LEISURE ACTIVITIES (LAST 3 MONTHS)

Participated in at least one of the following activities in the last 3 months

- Went to the live theatre
- Went to the ballet or opera
- Went to a jazz, classical or blues performance
- Went to an art gallery, museum, or antique exhibition
- Went to a short course, seminar, convention or public lecture
- Went to a historical house or building which is open to the public

ATTITUDINAL INFORMATION

Agreed with at least one of the following attitudinal statements:

- Aboriginal culture is an essential component of Australian society
- I'd like to holiday where I can experience the local culture

SOFT ADVENTURE

HOLIDAY ACTIVITIES (LONG TRIP)

Participated in at least one of the following activities on last long (3+ nights) holiday:

- Bike riding
- Horse riding, Trail riding
- Fishing, Hunting
- Bushwalking
- Other outdoor activities
- Water skiing
- Sailing
- Country, Wildlife, Scenery
- Wilderness
- National Parks, Forests
- Backpacking
- Nature holiday
- A real ecotourism experience

SPORTS PARTICIPATION

Participated in at least one of the following sports and activities on a regular or occasional basis:

- Fishing
- Hiking/Bushwalking
- Horse Riding
- Rock climbing/Abseiling
- Sailing
- Scuba diving
- Snorkelling
- Water skiing

ATTITUDINAL INFORMATION

Agreed with at least one of the following attitudinal statements:

- I love to do as many sports as possible
- I'm always very active on holidays
- For my next holiday, I'd really like a total ecotourism experience
- I prefer to holiday where I can see nature or be in a natural setting

TOURING

MODES OF TRANSPORT ON LAST LONG TRIP

Used at least one of the following transport types on last long trip:

- Own car or 4WD
- Friends/relatives car or 4WD
- Hire car or 4WD
- Caravan/ Campervan

DURATION OF LAST LONG TRIP

Spent at least 8 nights away on last long trip

LEISURE ACTIVITIES IN LAST 3 MONTHS

Participated in at least one of the following activities in the last 3 months:

- Took a day trip in a car
- Had a weekend away

ATTITUDINAL INFORMATION

Agreed (* or disagreed) with at least one of the following attitudinal statements:

- I usually book and arrange all my holiday travel details myself
- I usually leave holiday arrangements to someone else (*)
- I enjoy holidays where everything is organised for you (*)

WINTER ENTHUSIASTS

HOLIDAY ACTIVITIES (SHORT OR LONG TRIP)

Participated in skiing or snowboarding on last short (1-2 nights) or long (3+ nights) holiday

SPORTS PARTICIPATION

Participated in at least one of the following sports and activities on a regular or occasional basis:

- Skiing
- Snowboarding
- Ice Skating

Please note that this is a more inclusive definition, based on the low incidence of skiing in the Australian market.

CITY RESORT

HOLIDAY ACTIVITIES (LONG TRIP)

Participated in at least one of the following activities on last long (3+ nights) holiday:

- Cities
- Luxurious/ comfortable holiday
- Health resort/spa holiday

ATTITUDINAL INFORMATION

Agreed (* or disagreed) with at least one of the following attitudinal statements:

- I like to be with a crowd of people
- Expensive restaurants are not worth the money (*)
- I don't buy luxuries any more (*)
- I prefer the bright lights and big cities when I travel
- I prefer to holiday where I can see nature or be in a natural setting (*)

Appendix B: Photos Of Canada

Photo 1: Rockies Moraine Lake

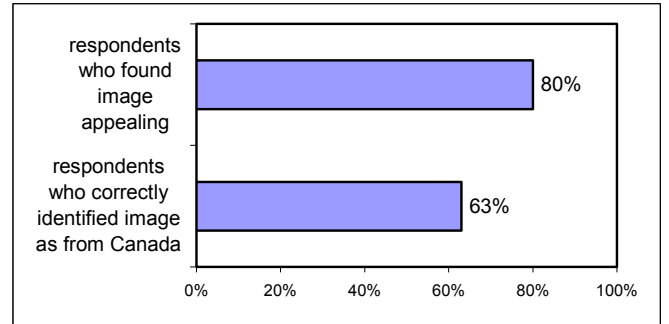


Photo 2: CN Tower, Toronto

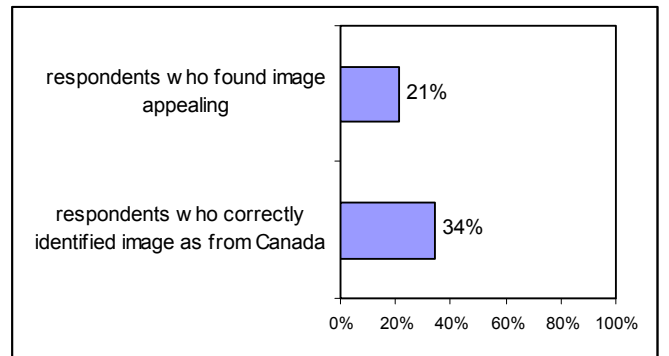


Photo 3: Parliament Building, Victoria

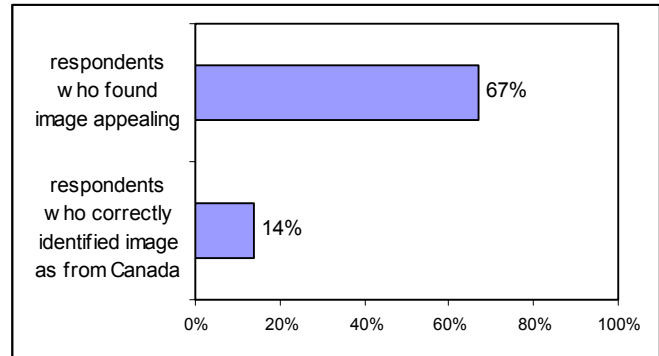


Photo 4: Whales, Vancouver Island

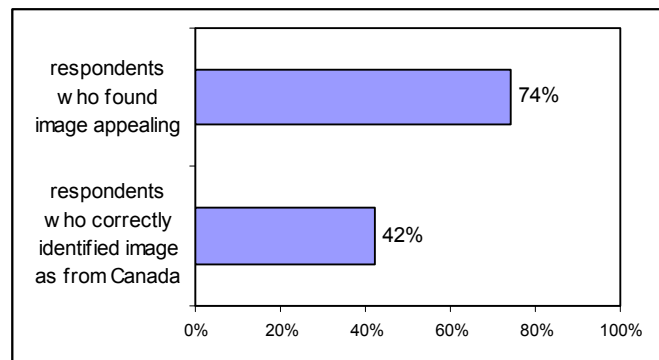


Photo 5: Quebec City

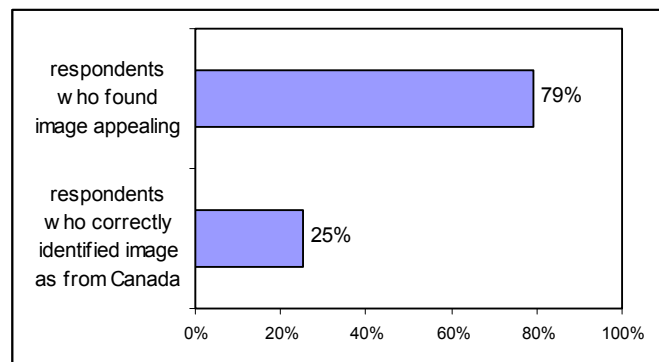


Photo 6: City waterfront, Vancouver

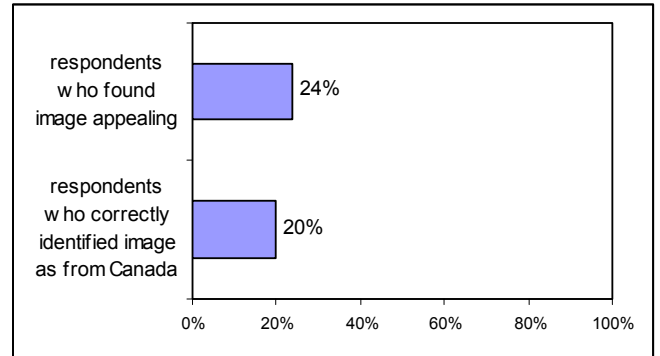


Photo 7: First Nations People in Saskatchewan

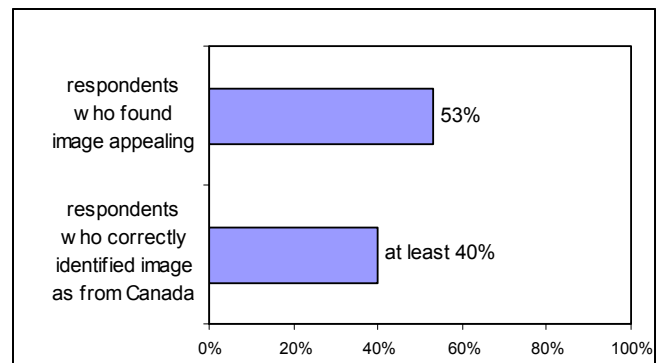


Photo 8: Dog sledding in the Yukon

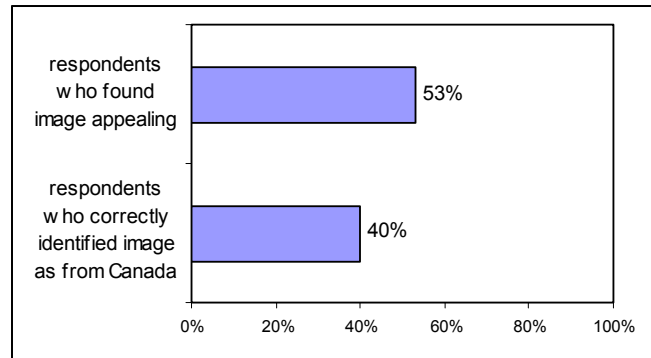


Photo 9: Niagara Falls - Horseshoe falls

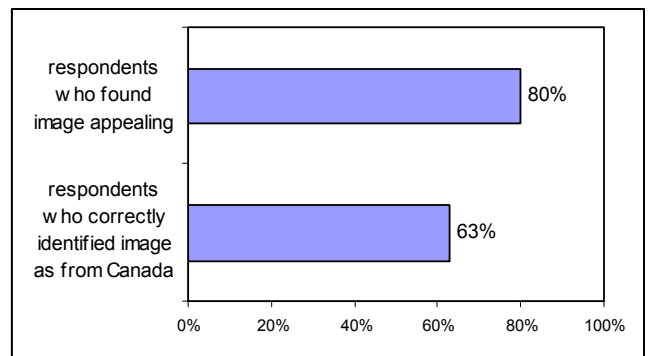


Photo 10: Banff (Banff Springs Hotel)

