



Canadian Tourism  
Commission

Commission canadienne  
du tourisme

# Global Tourism Watch

## China Summary Report - 2011



Canada



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## 1. Research Objectives

The Canadian Tourism Commission initiated a Global Tourism Watch (GTW) program in 2007 to expand the consumer-based intelligence in its key markets; the Canadian domestic market was later introduced in 2009. The overall objectives of the GTW study are:

- To monitor awareness, travel intentions and other key market indicators for Canada and the regions;
- To assess perceptions of Canada and track brand performance over time;
- To identify the general experiences sought by travellers, assess Canada's competitive positioning on key products and identify growth opportunities;
- To identify motivators and barriers for travel to Canada, as well as media sources and images that lift Canada's appeal.

## 2. Methodology

The target population for the online survey was residents aged 18 and older, who had taken a pleasure trip in the past three years where they stayed at least four or more nights with at least one night in paid accommodations or plan to take such a trip in the next two years. In China, this methodology was modified to an in-person recruit with online completion to ensure a more representative sample of travellers. Trips had to be outside of East Asia (China, Hong Kong, Macau, Japan and South Korea).

Pleasure trips included vacation or holiday trips, trips to visit friends and relatives, and combined business-pleasure trips. In China, the target was n=1,500 long-haul pleasure travellers, with a quota of n=200 recent travellers to Canada. The sample was restricted to the cities where Canada is permitted to market to travellers under the Approved Destination Status (ADS) agreement – Beijing, Shanghai, Guangzhou and Shenzhen – with the sample evenly split across the four cities. The survey was conducted in April 2011.

## 3. Market Outlook and Potential

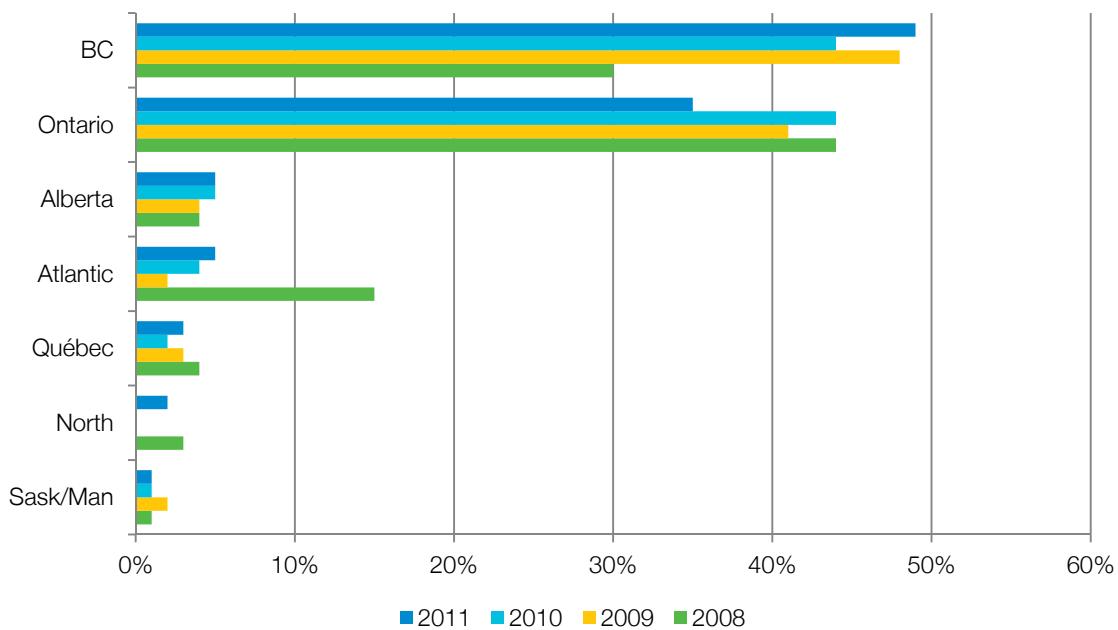
The proportion of Chinese travellers who consider long-haul travel to be very important has dropped dramatically over the last two years. Given the high cost of living and unsettled market conditions that currently hold sway in China, consumers seemed to be putting less priority on long-haul travel.

The GTW market outlook indicator (percentage difference between "will travel more" and "will travel less" in the next 3 years vs. the last 3 years) has risen to +40 in 2011, up three points from the +37 seen in 2010. While the market outlook was extremely positive in 2009 (+55), reflecting the strong growth of trips to Asian destinations, inflation concerns and gloomier market sentiments contributed to a much weaker outlook in 2010. In addition, the proportion of travellers planning to travel more in the next three years dropped by a remarkable 16 ppt in 2010, with those planning to maintain the status quo picking up most of the slack. The results appear to have stabilized in 2011, with a slight uptick in the market outlook providing some cause for optimism.

In 2011, 56% of Chinese travellers say they are definitely or very likely to visit Canada in the next two years. This is up almost 20 ppt from 2009 when the growing number of neophyte long-haulers and the prevailing trend to shorter Asian vacations combined to sink travel intentions to a record low of 37%. However, the more experienced and affluent travellers that dominate the market in 2011 have ramped up their vacation-taking with a renewed interest in far-flung destinations. While encouraging, these measures have yet to return to their 2008 baseline levels.

As [Exhibit 3.1](#) shows, almost half of likely visitors to Canada name British Columbia as their destination of choice, which is up 5 ppt over last year. On the other hand, Ontario has seen its standing as a must-see destination drop, tumbling by almost 10 ppt to a record low. All of the other regions in Canada are selected by 5% of the market or less, and have generally remained flat for the duration of the tracking study. The Atlantic region is a notable exception, with its popularity inching back up over the last two years, following a precipitous drop in 2009.

**Exhibit 3.1 Canadian Destination Most Likely to Visit**



*Base: Those likely to visit Canada in the next 2 years and/or those who are considering, have decided to visit or have booked a trip there.*

[Exhibit 3.2](#) shows the immediate potential for the regional partners on the GTW study based on current levels of interest. British Columbia and Ontario enjoy the greatest potential, with Alberta and Québec also commanding a sizeable potential market. Note that these figures, like the immediate potential for Canada as a whole, may be overstated in comparison with other GTW markets.

### Exhibit 3.2 Size of the immediate potential for Canada

	CDA	BC	ON	AB	QC	MB	YK	NU
<b>Immediate Interest<sup>1</sup></b>	56%	82%	58%	20%	18%	4%	4%	3%
<b>Potential (M)<sup>2</sup></b>	2.7	2.2	1.5	0.5	0.5	0.1	0.1	0.1

Base: Long-haul pleasure travellers (n=1,538)

<sup>1</sup> Base for percentages is those likely to visit Canada in the next 2 years and/or those who are considering, have decided to visit or have booked a trip there.

<sup>2</sup> Results are from the random telephone omnibus survey undertaken in 2010. Base is general population aged 18 plus.

Note: Regional estimates are not additive since travellers may visit more than one region on a single trip.

## 4. Unaided Destination Awareness

To measure top-of-mind awareness for Canada, respondents were asked to name destinations that come to mind for a long-haul vacation.

In 2009, many Asian destinations gained ground in the battle for awareness – a result of more planners and first-timers climbing aboard the long-haul train, coupled with a switch to shorter, more frequent trips to closer destinations by more experienced long-haul travellers reacting to the economic slowdown. As a result, awareness of destinations further afield plunged in 2009/10, often dramatically.

However, with rampant inflation now scaring off planners, a more sophisticated and affluent travelling population now dominates the marketplace. Spurred by a healthier economy, these upscale travellers are now giving in to pent-up demand for destinations further afield. As a result, unaided awareness for some long-haul destinations have climbed. On the other hand, awareness of Asian destinations are sinking.

The picture is somewhat different for Canada. While Canada also saw its awareness sink in the 2009 to 2010 timeframe, this indicator did not recover in 2011 (down 3 ppt to 10% from the previous year), bucking the trend seen for many of its non-Asian competitors. However, this is likely attributable to a seasonal shift for the GTW study, with the fieldwork being moved from late summer/early fall in the first three years to late winter/early spring in 2011. Canada has now fallen out of the top five for the first time, with the UK and Thailand vaulting past it this year.

### Exhibit 4.1 Unaided Destination Awareness

**(showing top 6 countries only)**

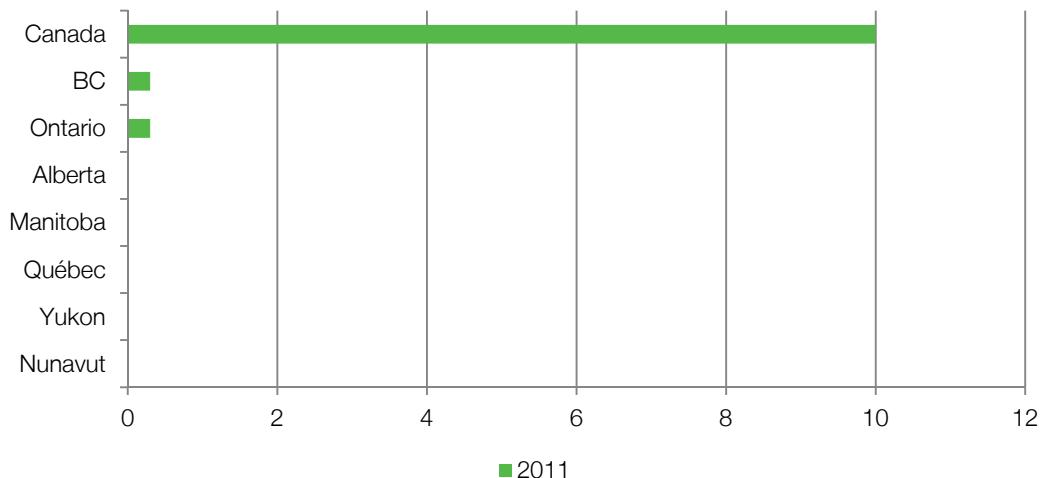
	2008	2009	2010	2011
<b>1. US</b>	29%	23%	25%	25%
<b>2. France</b>	27%	16%	21%	23%
<b>3. Australia</b>	31%	20%	15%	20%
<b>4. UK</b>	23%	11%	12%	15%
<b>5. Thailand</b>	11%	14%	9%	11%
<b>6. Canada</b>	18%	15%	13%	10%

Base : Long-haul pleasure travellers ( 2011 n=1,538)

Roll-up of brand mentions by country, e.g., percentage who said Canada or any destination in Canada.

**Exhibit 4.2** confirms that Canada's cities and provinces lack stand-alone awareness in China. Even British Columbia (Vancouver) is mentioned by only 0.3% of travellers as a potential vacation spot on an unaided basis.

**Exhibit 4.2 Unaided Awareness of Canada's regions**



Base: Long-haul pleasure travellers ( $n=1,538$ )

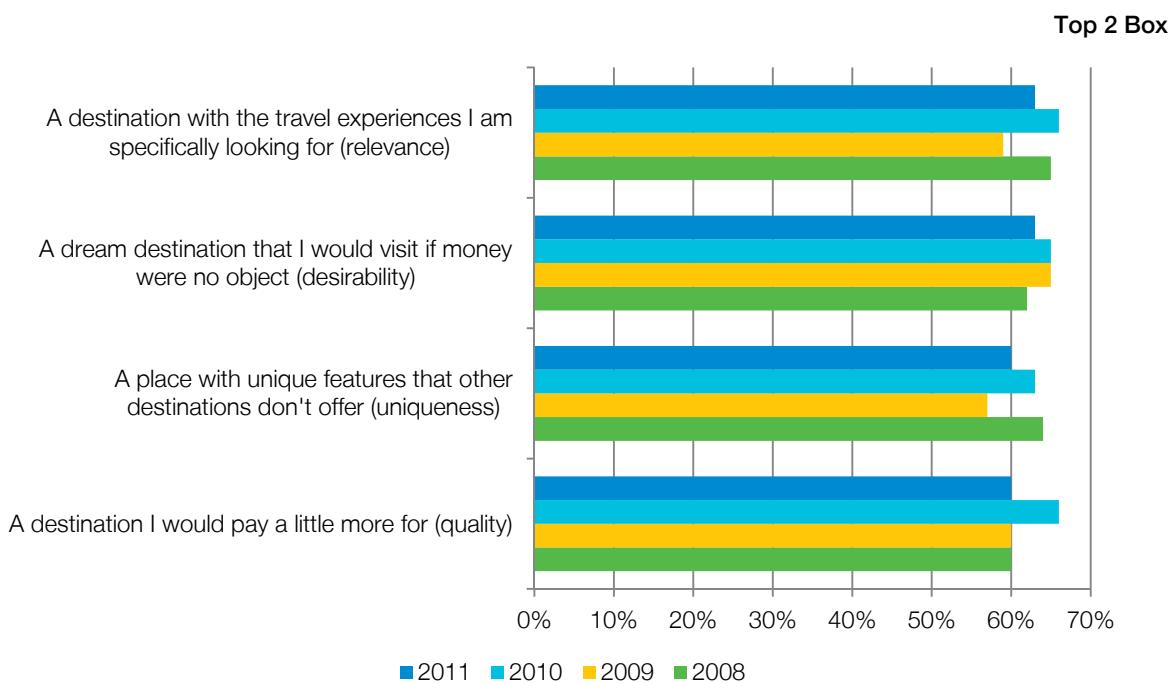
Note: Only GTW regional partners are included.

## 5. Canada's Value & Price Perceptions

Canada's success as a travel destination cannot be measured only by the degree to which its brand has established itself. It is important for Brand Canada to be perceived as offering value at a good price.

**Exhibit 5.1** shows that the value perceptions measure is veering downward with some of the individual attributes tumbling and returning to more normal levels after surging in 2010 (e.g., Quality, and to a lesser extent, Relevance and Uniqueness). The 2010 results received a major boost from Canada's exposure during the Shanghai Expo, as host of the Winter Olympics and from coverage of the first ADS tour groups to arrive on Canada's shores. With the influence of these mega-events tapering off in 2011, the value ratings are simply dropping back down to more typical levels.

**Exhibit 5.1 Value Perceptions**

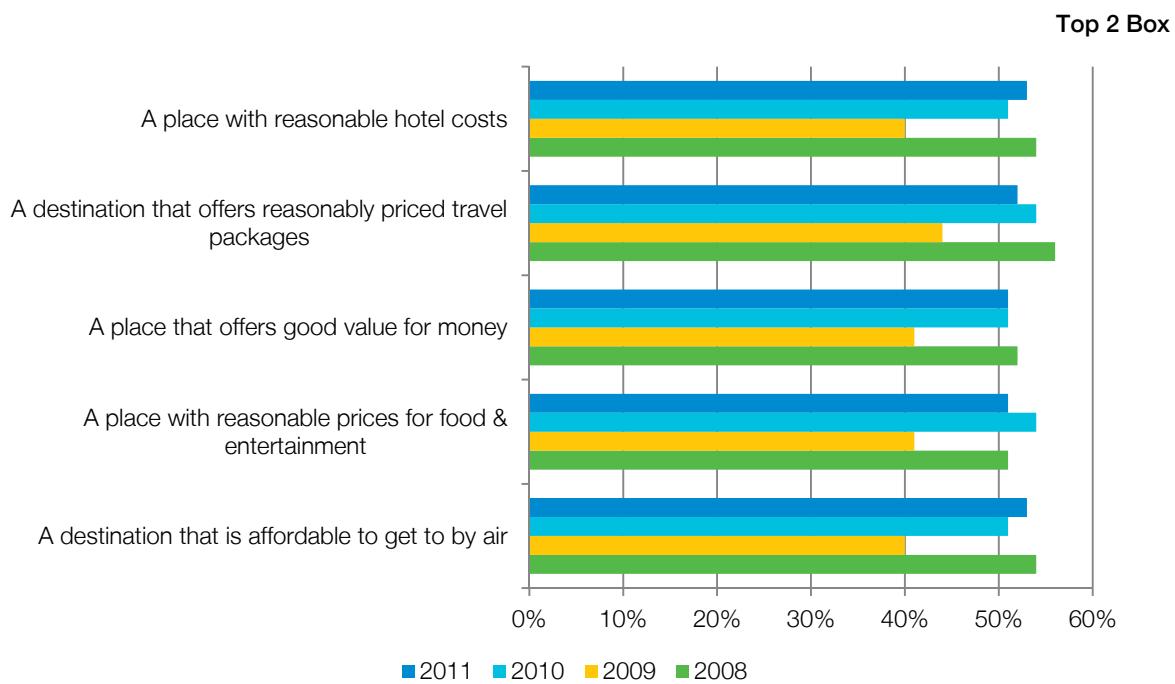


Base: Long-haul pleasure travellers (2011 n=1,538)

Note: Top 2 Box refers to a rating of 4 or 5 on a 5-point scale where 1 is "Strongly Disagree" and 5 is "Strongly Agree".

In addition to brand image and destination value, cost plays a major role when it comes to destination decision-making. Accordingly, **Exhibit 5.2** shows how Canada is perceived by Chinese travellers on various travel cost components. Perceptions of "hotel" and flight costs" have been climbing steadily since 2009, with perceptions of "travel package costs" and "value for money" also stabilizing this year at a level that is well over that recorded in 2009. The only area of concern might be perceptions of "food and entertainment prices", which have edged downward this year, however, the 51% posted in 2011 still represents a healthy 10 ppt gain over 2009. These gains are being driven by the increasingly upscale travelling population in China, who are less likely to be daunted by high inflation and by the higher travel cost to long-haul destinations such as Canada.

### Exhibit 5.2 Price Perceptions



Base: Long-haul pleasure travellers (2011 n=1,538)

Note: Top 2 Box refers to a rating of 4 or 5 on a 5-point scale where 1 is "Strongly Disagree" and 5 is "Strongly Agree".

## 6. Product Interest

Chinese travellers still tend to be relatively inexperienced and generalized in their preferences when it comes to long-haul travel. As such, they tend to want to see and do everything. As shown in Exhibit 6.1, there are 9 products that are of interest to 80% or more of the market, dominated almost solely by culture and nature activities.

However, the appeal of nature-related products appears to be waning in China, with appeal for scenery, nature close to cities, wildlife and national parks all sitting well below their 2009 levels. The same is true for some of the cultural products (e.g., local flavours, historical/cultural attractions), although others are seeing notable popularity gains (e.g., aboriginal culture/events and local lifestyles). The latter is being driven by a growing desire on the part of Chinese travellers to savour the local culture and experience the daily life of the people in the countries that they visit.

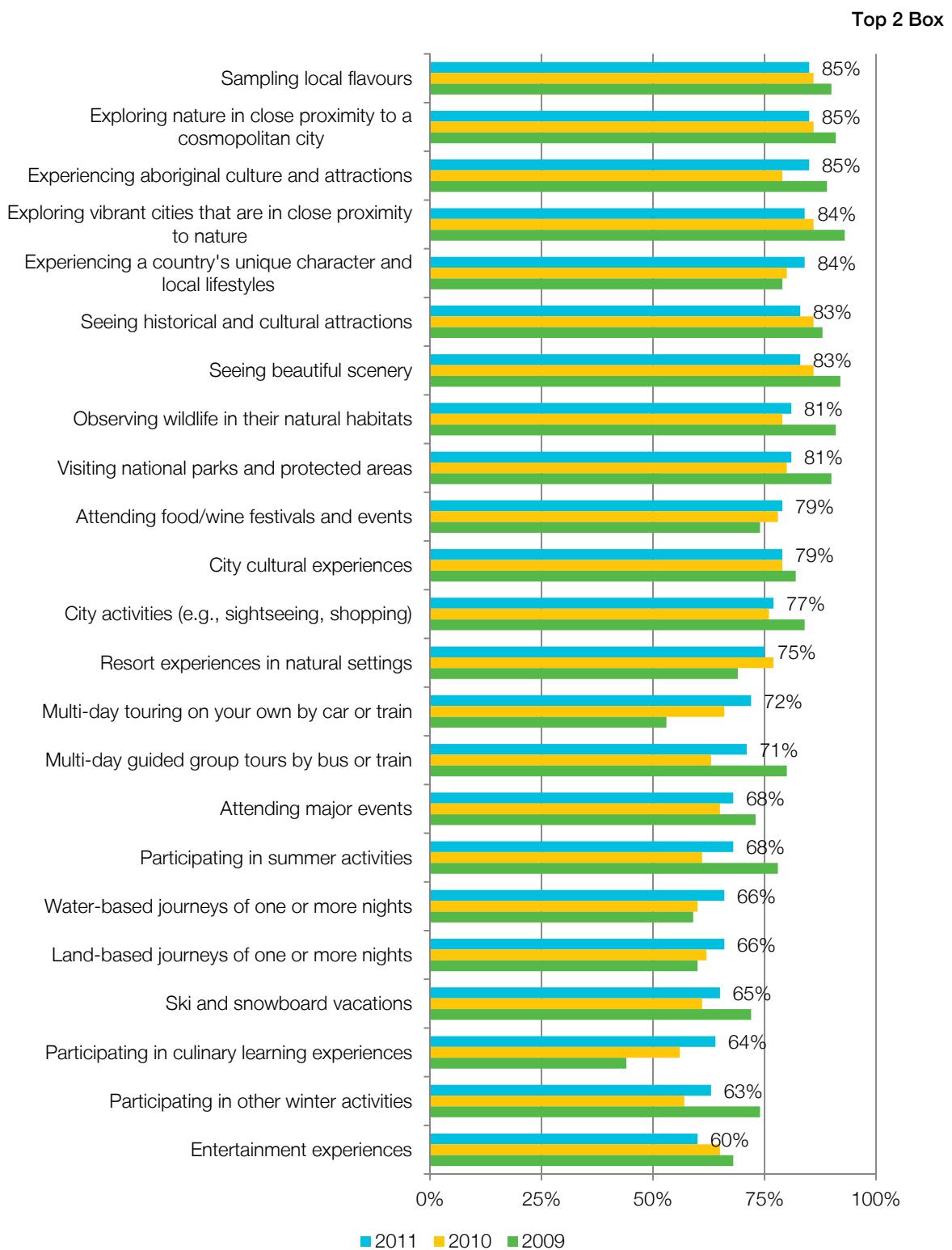
While city culture has maintained the status quo, exploring cities close to nature is down almost 10 ppt since 2009, and entertainment experiences is down 8 ppt, sliding into the last position on the chart. City activities such as shopping and sightseeing also remain below their 2009 peak.

On the other hand, interest in cuisine is growing in China, with food and wine festivals and culinary learning both seeing strong growth over the last two years. As China's consumers become increasingly westernized, they are taking more of an interest in foreign cuisine, with participation in cooking classes in places like France and Italy becoming trendy. In addition, grape wine is currently in vogue in China and is considered a status symbol among the elite, making wine testing events and festivals increasingly popular, particularly on trips to Europe.

With individual visas becoming more readily available to Chinese citizens (e.g., for some Asian destinations), self-touring has seen explosive growth over the last two years (increasing by almost 20 ppt). This is primarily being driven by more savvy travellers who prefer to eschew the constraints of a guided tour for the freedom of independent travel. Still, there is obviously a large (and growing) segment of travellers in China who continue to favour the traditional guided group tour (71%). More and more, however, they are seeking themed tours such as ski vacations, ecotourism holidays, special event travel or shopping trips to France. They are also beginning to demand more personalized tour experiences that focus on one country rather than several.

While demand for more passive nature pursuits is cooling, active experiences are seeing tremendous growth, with summer activities, water and land-based journeys, ski vacations and other winter pursuits all making strong strides in popularity over the last year or two. Skiing continues to boom in China, with new ski resorts opening up every year, including the Yabuli Resort by Club Med, which is now the country's largest skiing facility. This trend represents some potential for Canada to be developed as a niche market.

### Exhibit 6.1 Product Interests



Base:: Long-haul pleasure travellers (2011 n=1,533)

Note: Top 2 Box refers to a rating of always or often important on a 4-point importance scale.

Results not comparable to years prior to 2009 due to changes to the product list in that year.

## 7. Competitive Product Positioning

**Exhibit 7.1** provides more detailed results showing how Canada ranks against its six competitors on each specific product.

Because Canada was only recently permitted to market itself to Chinese consumers, its competitive positioning in China is relatively weak, with only two number one products to its name – ski vacations and winter activities. While Canada does have other strengths in the nature and outdoor arena (e.g., scenery, national parks, nature close to cities, wildlife and land-based journeys), it tends to rank second or third on these products (typically behind Australia and/or New Zealand). Moreover, Canada's positioning has weakened visibly or is trending downward on several of these activities, although it is typically still fairly close to the market leader in terms of point spread. Strengthening Canada's performance so that it is viewed as being second to none in the nature/outdoor arena is likely a key priority over the next few years. In fact, Canada has made a good start with land-based journeys, which is up 4 ppt this year, climbing from 7th place last year to 3rd this year.

On the other hand, Canada has taken some strong steps forward on several products that are out of its traditional areas of strength, namely, aboriginal culture, guided tours and entertainment experiences, with all of these products up by 3 or 4 ppt since last year. These gains are highly positive for Canada as they will help to broaden its image, strengthen its brand and grow its traveller base in China. With the publicity surrounding the first ADS tour groups to arrive in Canada in late 2010 and the CTC's inaugural consumer advertising campaign in early 2011, Chinese travellers will no doubt be keeping a close watch on Canada's group tour offerings, again making this product worthy of a strong marketing push.

In the interests of further diversifying Canada's image and presence in China, local lifestyles, aboriginal culture and resort experiences offer the best potential, with Canada within 6 ppt of the market leader in each case.

However, Canada continues to fare poorly on city activities (other than entertainment experiences), culinary learning and historical/cultural attractions, sitting in a distant sixth or seventh place. With a relatively wide margin separating Canada from the market leader (typically France or the US), these products tend to offer little opportunity for meaningful gains.

Some of Canada's close competitors have also seen major shifts this year. The prevailing trend for the US is a downward one, with this destination posting softer results on the majority of products in 2011. This loss of momentum for the US is good news for the Canadian tourism industry as it will help to divert more traffic (or person-nights) to Canada among Chinese travellers who are considering a trip to North America.

On the other hand, France tends to be viewed in a better light in 2011, moving significantly or directionally upward on many products. This is consistent with France's strong gains on both unaided awareness and consideration, as well as with the fact that it has held steady on interest while many other destinations have stumbled. France is riding high on strong exposure from the Shanghai Expo and President Jintao's visit to Paris in 2010, as well as pent-up demand for luxury shopping trips. France also benefits from good word of mouth in China from returning travellers as it caters to the Chinese by providing signage and services in Mandarin at many key attractions, hotels and shops.

### Exhibit 7.1 Competitive Positioning

	1	2	3	4	5	6	7
Ski and snowboard vacations	CAN 44%	AUS 27%	USA 25%	FRA 24%	NZ 24%	UK 22%	GER 19%
Participating in other winter activities	CAN 42%	USA 27%	AUS 27%	NZ 26%	FRA 25%	UK 23%	GER 21%
Seeing beautiful scenery	AUS 37%	CAN 36%	NZ 29%	USA 27%	FRA 24%	UK 23%	GER 21%
Visiting national parks and protected areas	AUS 32%	CAN 29%	USA 29%	NZ 27%	UK 26%	FRA 24%	GER 21%
Exploring nature in close proximity to a cosmopolitan city	AUS 34%	NZ 33%	CAN 32%	FRA 26%	UK 26%	USA 25%	GER 22%
Exploring vibrant cities that are in close proximity to nature	AUS 38%	NZ 32%	CAN 30%	USA 29%	FRA 27%	UK 23%	GER 21%
Observing wildlife in their natural habitats	AUS 36%	NZ 31%	CAN 29%	USA 26%	FRA 22%	UK 21%	GER 20%
Land-based journeys of one or more nights	FRA 31%	AUS 30%	CAN 28%	USA 27%	UK 26%	GER 25%	NZ 25%
Experiencing a country's unique character and local lifestyles	FRA 34%	AUS 32%	USA 30%	CAN 30%	UK 28%	GER 26%	NZ 25%
Experiencing aboriginal culture and attractions	AUS 35%	NZ 29%	USA 29%	CAN 29%	FRA 28%	UK 25%	GER 19%
Water-based journeys of one or more nights	AUS 34%	NZ 29%	FRA 27%	CAN 27%	UK 26%	USA 26%	GER 22%
Multi-day guided group tours by bus or train	FRA 31%	USA 28%	UK 28%	CAN 26%	GER 25%	AUS 24%	NZ 24%
Attending food/wine festivals and events	FRA 43%	UK 26%	GER 26%	CAN 25%	USA 25%	AUS 23%	NZ 21%
Entertainment experiences	USA 45%	FRA 30%	UK 27%	CAN 24%	AUS 24%	GER 21%	NZ 21%
Resort experiences in natural settings	USA 33%	FRA 33%	AUS 30%	UK 30%	CAN 28%	NZ 27%	GER 22%
Multi-day touring on your own by car or train	FRA 30%	AUS 29%	USA 28%	GER 26%	CAN 26%	UK 25%	NZ 23%
Sampling local flavours	FRA 45%	AUS 30%	UK 26%	GER 25%	CAN 25%	USA 24%	NZ 23%
Participating in summer activities	AUS 35%	NZ 30%	FRA 29%	USA 27%	CAN 25%	GER 24%	UK 24%
Seeing historical and cultural attractions	FRA 37%	UK 37%	GER 29%	USA 27%	AUS 26%	CAN 25%	NZ 22%
City activities (e.g., sightseeing, shopping)	FRA 38%	USA 37%	UK 32%	AUS 25%	NZ 25%	CAN 24%	GER 22%
City cultural experiences	FRA 36%	UK 33%	USA 31%	AUS 27%	GER 26%	CAN 23%	NZ 23%
Attending major events	USA 38%	UK 32%	GER 31%	FRA 28%	AUS 25%	CAN 23%	NZ 20%
Participating in culinary learning experiences	FRA 45%	AUS 28%	GER 25%	UK 24%	USA 24%	NZ 24%	CAN 22%

Base: Long-haul pleasure travellers (n=1,538).

Notes: Figures represent the percentage of respondents choosing the destination among the top 3 places to go for each attribute.

Legend: CAN = Canada, USA = United States, AUS = Australia, NZ = New Zealand, GER = Germany, FRA = France, UK = United Kingdom.

## 8. Sources of Information on Canada

Close to 90% of Chinese travellers claim to have seen travel-related information on Canada in the past 3 months (see [Exhibit 8.1](#)). This is very high in comparison with the other GTW markets completed to date – higher in fact, than the penetration rate in the domestic market. Social desirability bias is likely at work here, with Chinese travellers perhaps feeling some pressure to respond affirmatively.

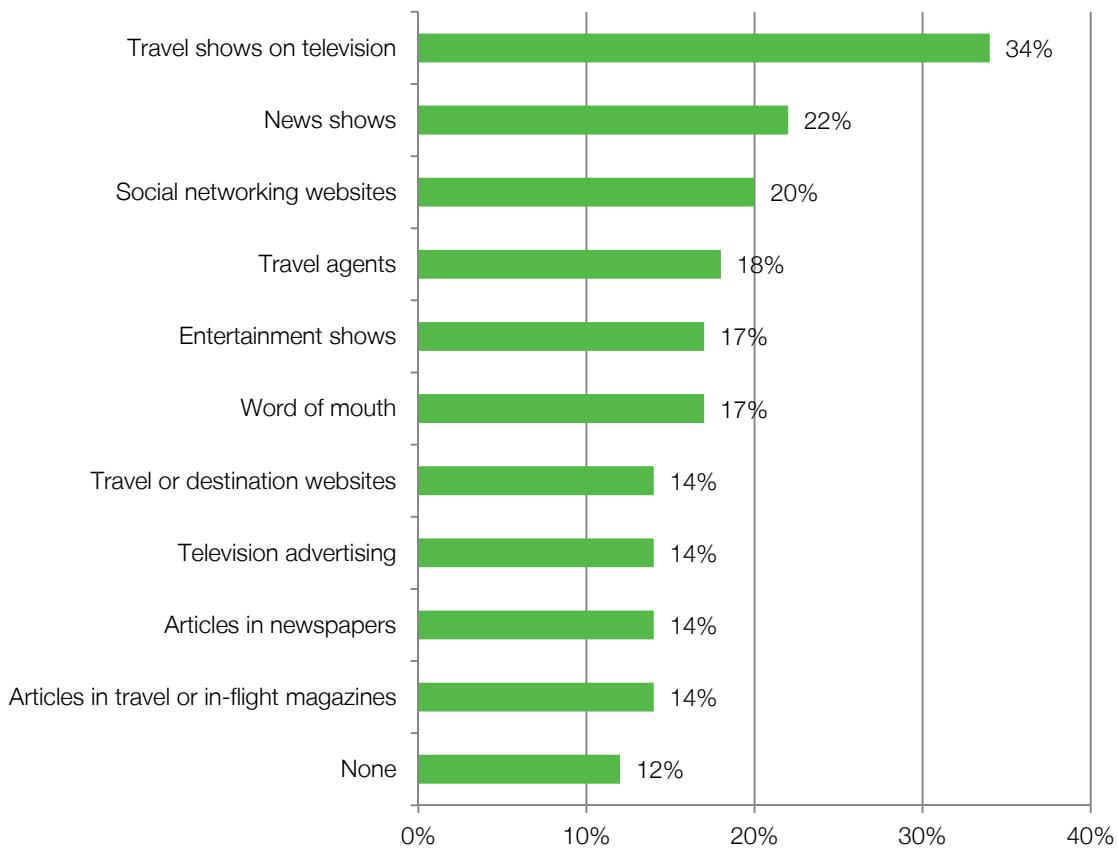
Like last year, television travel shows boast the highest penetration of any information source, by far, reaching over a third of the Chinese market. News and entertainment shows also represent excellent ways to reach Chinese travellers, with travel agents and social networking websites rounding out the top five sources. Word of mouth is the only other channel to be mentioned by more than 15% of the market, indicating that viral marketing approaches could be successful in China. It also underscores the importance of catering to Chinese tourists and making them feel special while in Canada.

At 20%, the proportion of Chinese travellers seeing information on Canada on social networking websites is far higher than in any other GTW market conducted to date. Although the absolute percentage is likely over-stated due to social desirability bias (as are most of the percentages in the chart), no other market awards social networking websites a third place ranking. Clearly, social networking websites like Kaixin, which target the affluent middle class, are a good way to reach potential Chinese travellers to Canada – better, in fact, than travel or destination websites at 14%.

Print media tends to be somewhat less effective than television as a distribution channel, with newspaper articles, articles in travel magazines and print advertising all achieving a 13% to 14% penetration rate.

**Exhibit 8.1 Top sources of information on Canada in the past three months**

(List top 10 sources only)



Base: Long-haul pleasure travellers ( $n=1,538$ )

Note: Question changed in 2011, so results are not comparable to previous years.

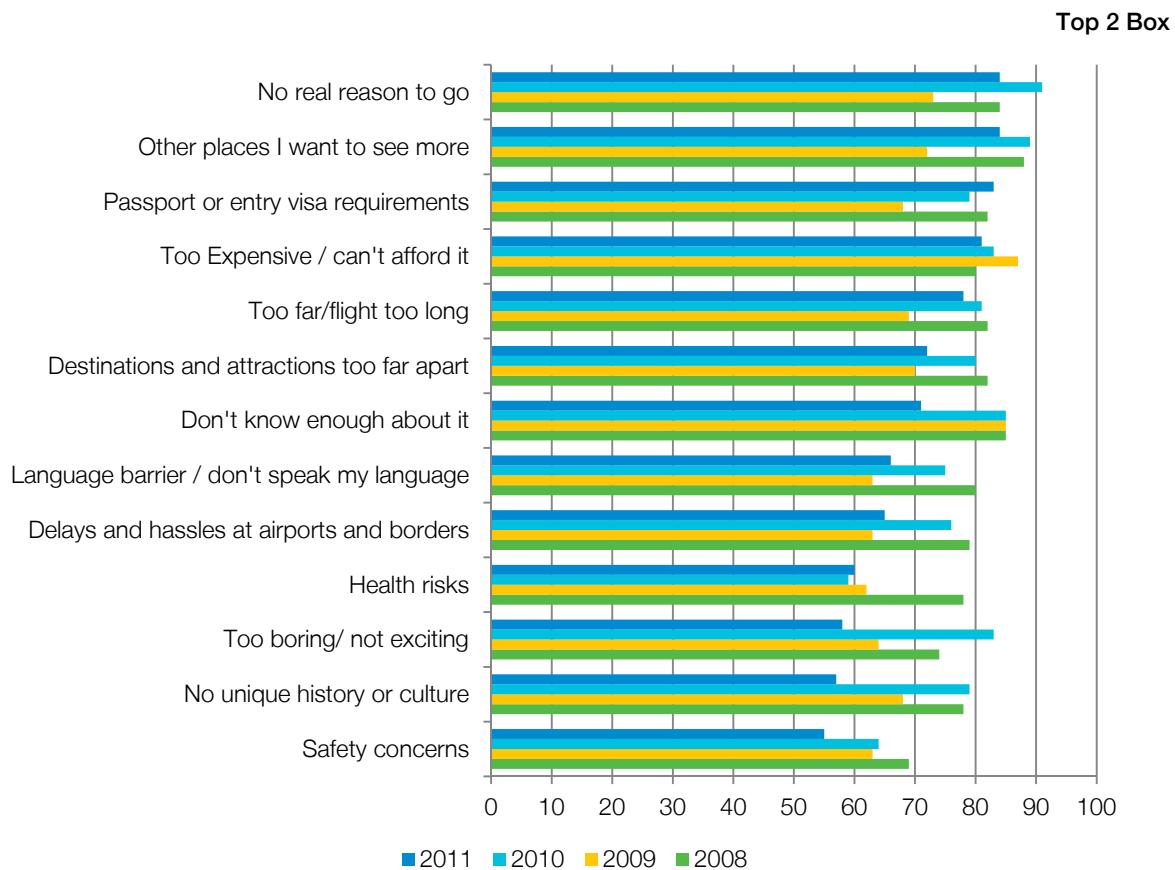
## 9. Key Barriers for Travel to Canada

**Exhibit 9.1** shows why Chinese long-haul pleasure travellers are unlikely to visit Canada in the near-term. These results are important because, more likely than not, travellers that are likely to visit may have similar concerns that could ultimately lead them to select alternate destinations.

For the most part, the barriers for travelling to Canada have eased since 2010, although destination awareness and competition remained as top two barriers. Again, this may reflect the evolution of the market to one that is more upscale and sophisticated, with travellers having several long-haul trips under their belts and a better grasp of the ins and outs of foreign travel.

A notable exception is “passport/visa requirements”, which have become a growing deterrent over the last couple of years, despite the fact that Canada is now an approved ADS destination. This result could be due to the lingering perceptions of Canadian visa rejection as the approval rates for a tourist visa have improved over the last few years.

**Exhibit 9.1 Key Barriers for visiting to Canada**



Base: Long-haul pleasure travellers who are unlikely to visit Canada in the near future.

Note: Percentage is the sum of major barrier and minor barrier responses.

## 10. Conclusions: Key Take-Aways

The economic environment and consumer sentiments in China in 2011 were in a state of flux. Chinese consumers had been struggling to cope with runaway inflation, with food, energy and housing costs all rising dramatically over the last two years. In the month prior to the 2011 GTW, consumer confidence hit its lowest level since 1996 and retail sales softened, with public protests and strikes ongoing through the survey period.

- As relatively inexperienced travellers, the Chinese are fairly impressionable, with external factors tending to drive large fluctuations in the marketplace. Since 2009, the uncertain external environment has had a profound impact on the composition of the long-haul travel market. The escalating cost of living and anxiety about the future has caused less avid travellers and lower income segments to temporarily put their long-haul travel plans on hold, resulting in an increasingly affluent and sophisticated travelling population. Approximately 62% of Chinese travellers now have household incomes of 10,000 yuan per month or more, which is up considerably from only 48% in 2009.
- Buoyed by a healthier economy and pent-up demand in 2011, today's more upscale Chinese travellers are ramping up their long-haul vacations, taking more frequent trips and seeking out vacation spots that are further afield. This is driving a strong recovery for Canada, the US and Europe, with Chinese visitation bouncing back after travellers retreated to nearby Asian destinations in 2009 in response to the economic downturn. These sophisticated travellers are also being drawn to exciting new destinations that have recently entered the market (e.g., Dubai, India, Tunisia), leading to stiffer competition for more traditional long-haul destinations like Canada.
- After plunging from a high of +55 in 2009 to +37 in 2010, the GTW market outlook indicator appears to have stabilized at +40 in 2011. While this is a positive sign, it is being driven in part by the increasingly upscale market, with more well-to-do travellers less likely to be deterred by the rampant inflation that has gripped China. There are several factors, however, that may help to counter the sinking disposable incomes of middle-income consumers and spark healthy market growth over the next couple of years. An increasing number of low cost carriers serving China, more direct air routes to long-haul destinations and discounted package prices on online booking sites are making travel more accessible and affordable for the middle class. Moreover, the launch of consumer finance companies and the increasing prevalence of credit cards are giving these travellers alternative ways of funding their trips.
- The 2011 KPI reflect a marketplace that is dominated by more affluent travellers who have resumed their travels to far-flung destinations. Over the last two years, unaided awareness of European destinations such as France and UK have recovered to sit at levels that are significantly above their 2009 lows. These gains have come at the expense of Asian destinations (e.g., Maldives, Indonesia, the Philippines, Singapore, Malaysia, Thailand) who have fallen out of favour now that more distant vacation spots are back in vogue.
- While Canada also lost ground to the Asian destinations in 2009, its unaided awareness level did not recover in 2011 like that of its competitors. This is likely because the timing of the GTW fieldwork has shifted from late summer/early fall in previous years to late winter/early spring in 2011. With Canada more likely to be out of mind during the colder months, the timing shift may have masked any popularity gains.

- 2010 was a banner year for brand and value perceptions of Canada, fuelled by the combined effects of the Vancouver Winter Olympics, the well-received Canada pavilion at the Shanghai Expo and the arrival of the first ADS tour groups to Canada. Without these mega-events to sustain the level of these perceptions, 2011 results for value perceptions have now returned to their baseline levels. The Price Perceptions, on the other hand, are tracking upward in 2011, returning to more normal levels after the focus on cheaper Asian destinations caused a severe dip in 2009. Although all three indicators have now reverted to the status quo, the Canadian Industry may want to pay particular attention to the Value Perceptions as Chinese travellers tend to be very value-conscious, seeking quality products and premium experiences.
- In terms of Canada's product positioning in China, skiing and winter activities are its primary strengths. Skiing is also the top Canadian dream vacation experience in this market, mentioned by 14% of all travellers. This is good news for Canada, as the Chinese ski market has taken off over the last couple of years, with ski holidays being a hot ticket for domestic travel, particularly when twinned with hot spring visits. However, Canada does not have a leadership position on any of the other products, including its traditional area of strength – nature and outdoor pursuits. Improving Canada's positioning here is likely a key priority for Canada, with some awareness building bound to be effective in arresting the downhill slide and permitting Canada to be a bona fide leader for outdoor adventure.
- Other areas to potentially focus on include aboriginal culture (where Canada has already made some strong inroads with its premier offerings) and guided group tours (which have been strengthening as a travel driver for Canada). Local lifestyles and resorts in natural settings represent other opportunities, with the number one spot well within Canada's grasp. Strengthening these particular products will give Canada some added diversity, so that it does not appear so one-dimensional.