

Tourism Canada Pre-post Advertising Study
- Ppresentation Material
Type of Study: Statistics/surveys Tourism,
Date of Report: 1986
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TOURISM CANADA PRE-POST ADVERTISING STUDY

- Presentation Material -

Prepared for: Tourism Canada

Prepared by: Hutchinson Reid Ltd.

July, 1986

Offices: Vancouver Edmonton Calgary Winnipeg Regina Ottawa Toronto Montreal Halifax Affiliates: Access Survey Research CanWest Agricultural Research

OVERVIEW OF DOCUMENT

- Objectives
- * Methodology
- * Survey Accuracy
- Summary
- Main Findings
 - Awareness of Advertising
 - Awareness of Canada
 - Intention to Visit Canada
 - Effect of Advertising

OBJECTIVES

Overall Objective:

To determine the effectiveness of an advertising campaign on the attitudes towards Canada as a viable vacation destination.

Specific Objectives:

- (a) To measure levels of awareness of Canada as a viable tourist destination, pre and post the Spring 1986 advertising campaign.
- (b) To measure intention to vacation in Canada within the next two years, pre and post advertising.
- (c) To measure awareness of advertising for Canada, pre and post advertising.

METHODOLOGY

- * In total: 6100 telephone interviews
- * Pre-Campaign 2400 interviews:

-600 interviews in:

- . Boston . Chicago
- . New York San Francisco
- * Post-Campaign 3700 interviews:

-900 interviews in:

- . Boston . Chicago
- . New York

-1000 interviews in:

San Francisco

METHODOLOGY (Cent'd)

- * Sample Frame a) U.S. adults 25 years of age or older
 - b) who have taken a pleasure trip within the past twelve months
 - c) and have a household income of \$25,000 or more.
- * Half the sample was male, half female.
- * All pre-campaign interviewing was conducted in the week prior to the start of the advertising campaign (March 3, 1986). Post-campaign interviewing was done in the two weeks after the end of the campaign, (April 28th in San Francisco and May 12th in the other 3 cities).

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SURVEY ACCURACY

For sum of samples = 1500 (pre + post):

- * Comparing percentages which total 50-10070 (pre + post): $\pm 4-4.5\%$ (19 times out of 20).
- * Comparing percentages which total 25-40% (pre + post): $\pm 3-4\%$ (19 times out of 20).
- * Comparing percentages which total 8-2070 (pre + post): $\pm 2-3\%$ (19 times out of 20).
- * Accuracy increased by consistency between sampling points (cities).
- * Accuracy increased by consistency between types of trips.
- NOTE: 'Significant' differences: A difference this large (or larger) would not be expected by chance alone, 19 times out of 20.

'Directional' differences: A difference this large would not be expected by chance alone, 4 times out of 5.

PRE/POST ADVERTISING SUMMARY

A. Awareness Of Advertising

- 1. Overall, each of the four cities showed a significant increase in the awareness of advertising for Canada.
- 2. There was a significant increase in the awareness of television advertising in all four cities, and a significant increase in awareness of newspaper and magazine advertising in Chicago and San Francisco. There was a decrease in the awareness of magazine and newspaper advertising in Boston.
- 3. The unaided awareness (seen) of <u>TV</u> advertising for tourism to Canada, other than for Expo '86 was:
 - 55% in New York
 - 64% in Boston
 - * 65% in Chicago
 - * 50% in San Francisco

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- 4. The unaided awareness (seen) of Magazine advertising for tourism to Canada, other than for Expo '86 was:
 - * 38% in New York
 - * 31% in Boston
 - * 32% in Chicago
 - * 440/o in San Francisco
- 5. The unaided awareness (seen) of Newspaper advertising for tourism to Canada, other than for Expo '86, was:
 - * 29% in New York
 - * 3 1% in Boston
 - * 290/o in Chicago
 - * 210/o in San Francisco
- 6. When aided with a description of the TV ads the stated awareness (seen) of any of the three ads was:
 - * 540/o in New York
 - * 66% in Boston
 - * 66% in Chicago
 - * 61% in San Francisco

7. When aided with a description of each of the three advertisements, in all four cities the Wild World television advertisement was recalled most often. Almost as well recalled was the Old World advertisement. The recall of the New World advertisement was about half the recall of the Wild World advertisement in all four cities.

B. Recall Of Specifics

- 8. When asked to describe the general tourism <u>TV</u> ads:
 - * 19% in New York
 - * 29% in Boston
 - * 27% in Chicago
 - * 280/o in San Francisco . . .
 - ... were able to describe aspects of the Tourism Canada ads.
- 9. When asked to describe the general tourism Magazine ads:
 - * 13% in New York
 - * 130/0 in Boston
 - * 130/0 in Chicago
 - * 24% in San Francisco . . .
 - ... were able to describe aspects of the Tourism Canada ads,

- 10. When asked to describe the general tourism Newspaper ads:
 - * 30/0 in New York
 - * 3% in Boston
 - * 496 in Chicago
 - * 4% in San Francisco . . .
 - ... were able to describe aspects of the Tourism Canada ads.
- 11. Spontaneous recall of the television advertising resulted in the Wild World advertisement being remembered most in all four cities.

 In New York and Boston, the Old World advertisement was remembered spontaneously more often than the New World advertisement. In Chicago and San Francisco, the Old World and New World advertisements were recalled spontaneously about as often.
- 12. In the Wild World advertisement, specific comments relating to Canada's natural beauty were the most frequent memorable mentions. Other comments included rivers and lakes, and fishing at dusk.
- 13. In the Old World advertisement, specific comments on historical buildings, Quebec and Canada's ethnic diversity, were the most frequent comments.

- 14. In the New World advertisement, the most frequent comments included the city skyline, the CN Tower, and nightlife.
- 15. For those respondents who made comments which made it difficult to determine whether or not they saw a Tourism Canada advertisement, most frequent comments were on Canada's scenic beauty.
- 16. Those respondents who recall seeing a magazine advertisement were most likely to recall outdoor scenes and to comment on specific regions of the country. In New York and Boston, Quebec was mentioned most often followed by the Atlantic provinces, whereas in San Francisco, western Canada, B.C. and Ontario were mentioned most often. Frequent mentions were made of outdoor sports as well as the multiculturalism dimensions of the country. Of the general comments, the vast majority were very positive towards the advertisements.
- 17. The specific recall of the newspaper advertisements was low overall in comparison with the other two media. The most frequent comment on the newspaper advertisements were positive comments about Canada.

c. Thoughts And Feelings

- 18. The vast majority of thoughts and feelings on seeing the television advertisements were positive. The most frequent comment was that they wanted to come to Canada.
- 19. Thoughts and feelings on the magazine advertisements were even more positive than the television advertisements.

D. <u>Awareness</u>

20. Overall, total spontaneous mention of Canada, compared to the competition for all trip types, was significantly greater in all four cities after the advertising campaign.

E. <u>Intention To Visit Canada</u>

- 21. Overall, the likelihood of coming to Canada in the next two years showed a significant increase in all four cities, after the advertising.
- 22. Significant differences in definitely likely to come to Canada were evident in New York, Boston and Chicago.

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23. In New York, the most significant increase in likelihood of visiting was found in touring trips followed by city trips. In Boston, the most significant increase was found in touring trips. In Chicago, the most significant increase was found in touring trips and resort trips. And in San Francisco, the most significant increase was found in special event trips and then resort trips.

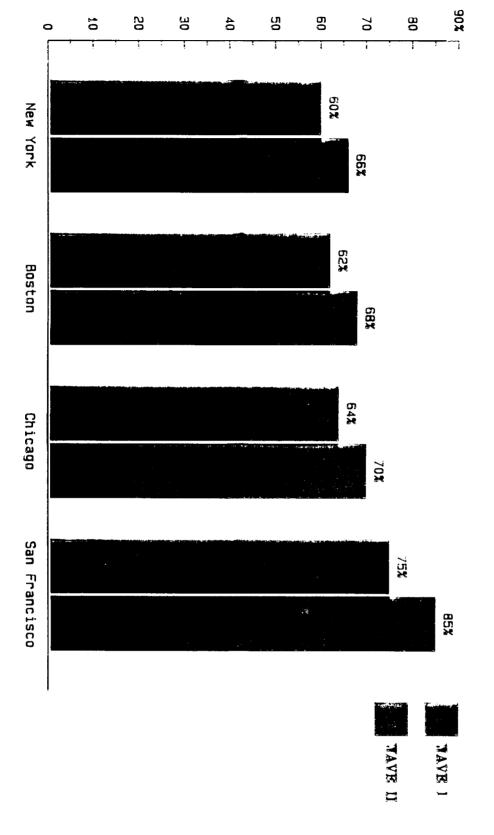
F. Effect Of Advertising

- 24. In all four cities, the likelihood of coming to Canada increased significantly between respondents who spontaneously recalled the television advertisement and those who recalled the television advertisement when prompted, compared to those who had no recall of any advertising.
- 25. This increase was most dramatic in the definitely likely to come to Canada results.
- 26. In New York, those respondents who recalled seeing TV advertising were more probably likely to come to Canada for all trip types. In Boston, significant increases were most evident in touring, city and outdoors trips. In Chicago, increases were most evident in outdoors trips. In San Francisco, increases were most evident in city and special event trips.

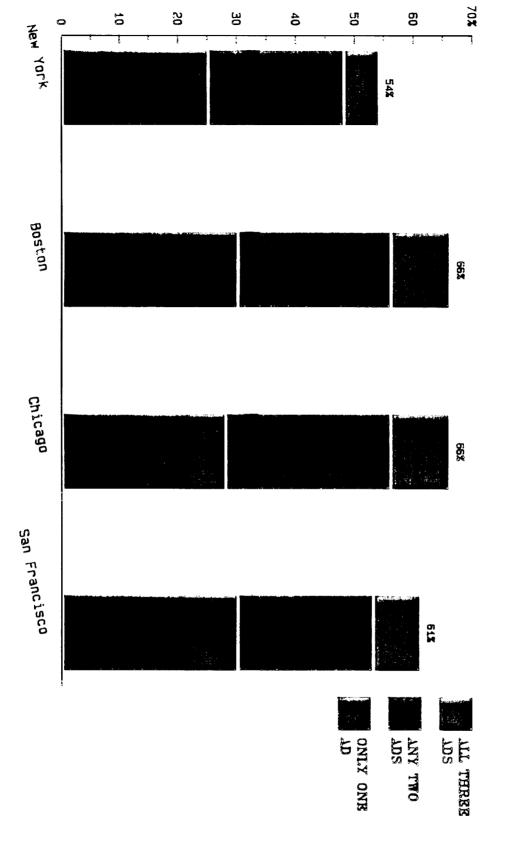
AWARENESS OF ADVERTISING

AWARENESS OF ADVERTISING FOR CANADA

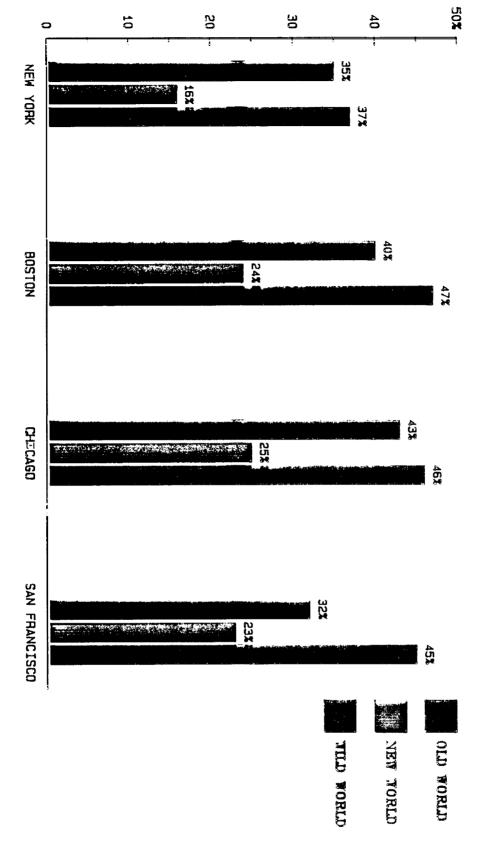
Have Seen Any Advertising For Canada



OF ANY TOURISM CANADA T.V. AD



AIDED RECALL OF TV ADS BY CITY



RECALL OF SPECIFICS

(TOTAL MENTION) What do you recall from these television ads?

New York Bostor Chicago San Francisco		CITY					
NET DEFINITELY SAW TOURISM AD AD NET DID WORLD		New York	Bostor	Chicago	San Francisco		
AD	BASE	450	488	505	540		
(NET) OLD WORLD							
Historical buildings 18 3% 3% 1% 3% 3% 1% 3% 3%				47%			
European flavour	1 /			 -			
Train Quebec							
Quebec 45 6% 28 38 Ethinic diversity 38 3% 3% 3% 4% Other old world 28 3% 3% 3% 4% (NET) NEW WORLD 78 14% 14% 15% Skyline/C.N. Tower 48 6% 6% 6% Active Characters 18 2% 2% 1% Nightlife 28 5% 58 6% Active Characters 18 2% 2% 1% Nightlife 28 5% 58 6% Active Characters 18 2% 2% 1% Other New World 18 0% 1% 1% Other New World 18 0% 1% 1% Other New World 228 328 31% 33% Outdoor Sports 28 48 5% 8% 5% Nature 166 218 23% 27% 27%	∸						
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Active Characters Nightlife Action/lights Other New World (NET) WILD WORLD Outdoor Sports Fishing at dusk Nature River/lake/ocean Banff Springs Woman diving (NET) OTHER DEFINITE Slogan World Next Door' Diversity of culture General Positive General Positive General Negative Scenic Beauty Made me want to come to Canada Canada "close" to U.S. Scenes and activities (NET) DIFFERENT AD Expo Vancouver B.C. Concentrates on one province/city Skiing Active Characters 18 2% 2% 18 0% 118 0% 118 5% 118 0% 118 33% 118 33% 118 33% 118 33% 118 33% 118 33% 118 33% 118 33% 118 33% 118 33% 118 33% 118 0% 118 0% 128 128 23% 129 128 23% 120% 128				14%	15%		
Nightlife				6%	5%		
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Other New World				5%	6%		
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Scenes and activities		2%	1%				
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Airlines							
Summer rates 1% 0% 0%							
				0%			
	Other			5%			

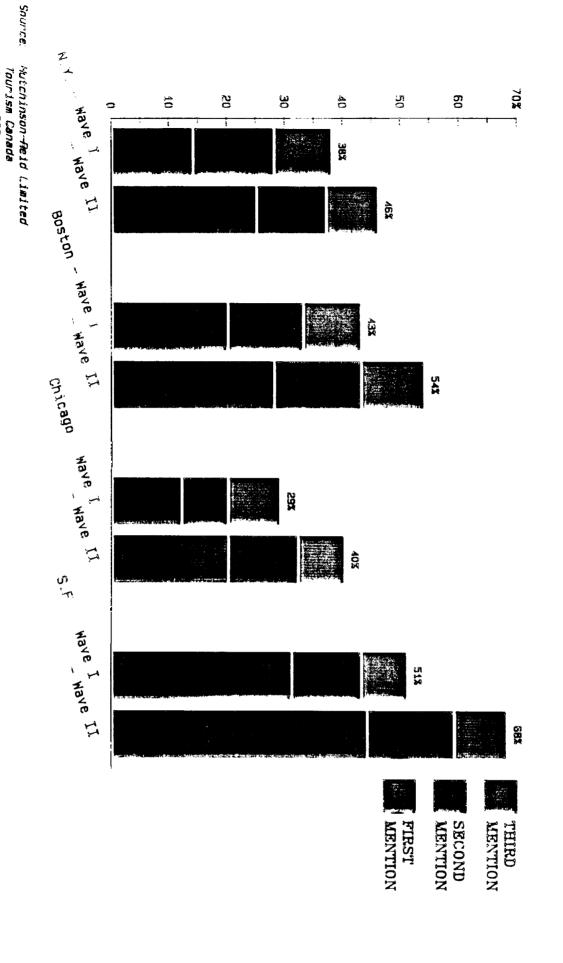
(TOTAL MENTION) What do you recall from the MAGAZINE ads?

	CITY				
	New York	Boston	Chicago	San Francisco	
BASE	218	184	195	359	
(NET) DEFINITELY SAW	54%	65%	61%	67%	
(NET) SPECIFIC REGION	22%	26%	13%	24%	
Quebec	11%	17%	7%	5%	
Ontario	3%	3 %	3%	7%	
Atlantic Prov.	6%	7%	1%	1%	
B.C.	3%	2%	1%	7%	
Western Canada	2%	1%	3%	13%	
(NET) SPECIFIC LOCATIONS	6%	11%	10%	9%	
Chateal Frontenac Capital Parliament	2%	5%	1%	2%	
Capital Parliament	2%	3%	3%	0%	
C.N. Tower		1%	1%		
Banff/Lake Louise	1%	2%	4%	6%	
Expo Site	1%	2%	3%	1%	
Other	_ ,	1%		1%	
(NET) OUTDOOR SCENES	22%	26%	24%	40%	
Nature	9%	9%	11%	21%	
`Seaplane on lake	3%	5%	5%	9%	
`Fresh air beautiful scenery	9%	6%	9%	13'%	
Other	7%	9%	5%	11%	
Animals Wildlife	2%	1%		0%	
(NET) SPORTS	6%	11%	14%	11%	
Hiking Climbing Canoeing	1%	4%	3%	4%	
Fishing Hunting	3 %	2%	9%	4%	
Other sports	3%	7%	4%	5%	
(NET) CULTURE	7%	11%	9%	12%	
Multiculturalism	5%	7%	88	48	
'Mountie Guard Change	3%	4%	2%	9%	
(NET) FOOD	1%	2%	1%	2%	
Restaurant Cafe	1%	2%	1%	2%	
Other Food	1%	1%	1%	18	
(NET) OTHER	9%	15%	15%	11%	
Maple Leaf / Flag		3%	48	48	
Resorts Hotels	3%	4%	5%	2%	
Urban Scenes	6%	9%	9%	5%	
(NET) INDETERMINATE	30%	30%	31%	33%	
Positive to Ad	24%	22%	24%	22%	
'Negative to Ad	2%	22/0	1%	38	
Positive to Canada	0%	1%	18	1%	
Other	9%	10%	9%	12%	
(NET) DIFFERENT AD	128	11%	7%	11%	
Describes Other Ad	4%	2%	2%	2%	
Other Literature	9%	10%	5%	10%	
OCITCE DICCERCULE	2.0	10/0	ی ا	1 1070	

(TOTAL MENTION) What do you recall from the NEWSPAPER ads?

		CITY				
	New York	Boston	Chicago	San Francisco		
BASE	166	187	177	174		
(NET) DEFINITELY SAW	14%	13%	18%	2.1%		
(NET) PLACES	5%	4%	3%	14%		
Vancouver	4%	2%	1%	10%		
Expo 86	2%	1%	1%	3%		
Rockies	1%	2%	1%	2%		
Other places		1%				
(NET) OUTDOOR ACTIVITIES	3%	3%	8%	5%		
Fishing	1%	3%	7%	3%		
Backpack/canoe	2%	2%	2%	1%		
(NET) CULTURAL	4%	4%	4 %	2%		
Cultural appeal Historical Sites	2%	3%	4%	2%		
Other	2%	1%		1%		
	2%	2%	3%	2%		
(NET) INDETERMINATE Positive Ad	27%	26%	24%	2.4%		
Negative Ad	7%	38	5%	3%		
Positive Canada	2%	6%	3%	7%		
(NET) DIFFERENT AD	_ 20%	21%	16%	16%		
Airlines Ad	47%	63%	51%	44%		
Tour Co. Ads	1%	6%	7%	10%		
Mentions Expo 86	21%	40%	22%	30%		
Other Ads	100/	2%	2%	2%		
Other	19%	25%	20%	6%		
OCHET	9%	7%	11%	2%		

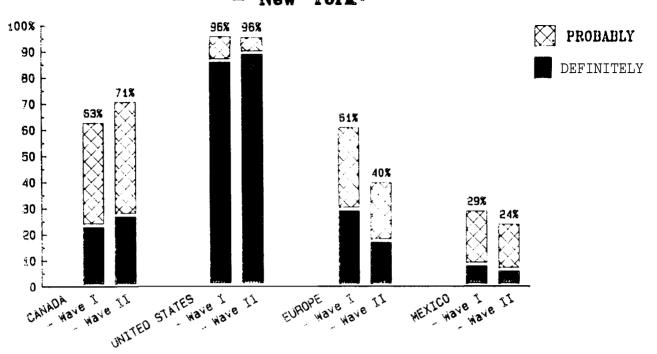
AWARENESS OF CANADA



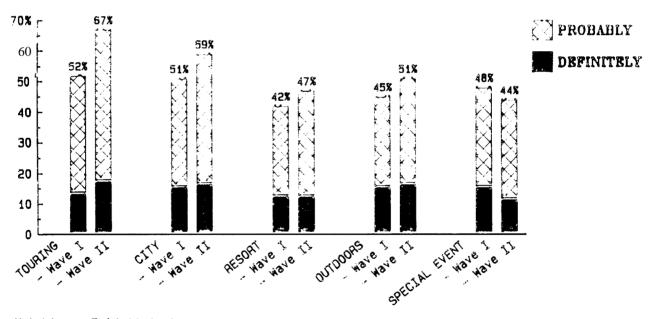
June, 1986

INTENTION TO VISIT CANADA

LIKELIHOOD OF VISITING IN NEXT TWO YEARS Each Country by Any Trip Type - New York

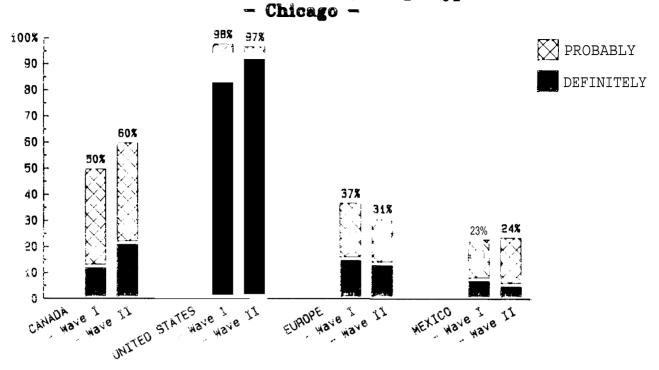


Canada by Trip Type - New York -

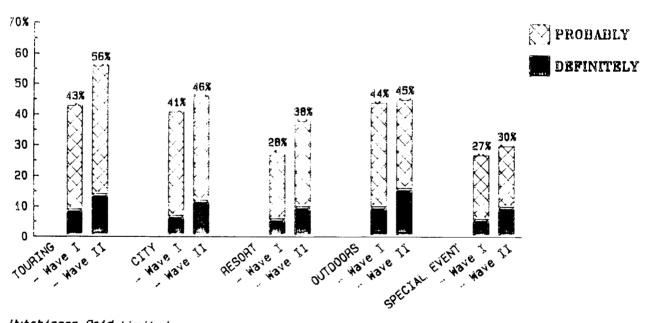


Source: Hutchinson-Reid Limited Tourism Canada June. 1986

LIKELIHOOD OF VISITING IN NEXT TWO YEARS Each Country by Any Trip Type

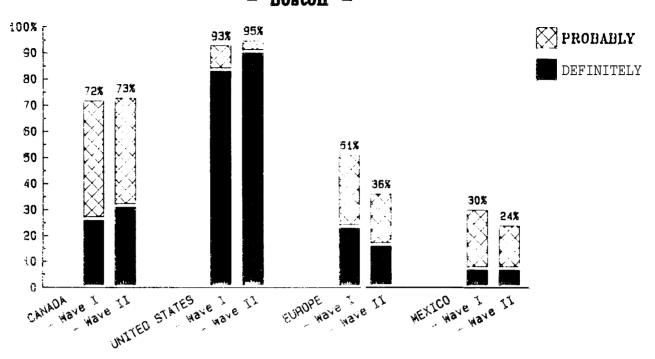


Canada 'by Trip Type - Chicago -

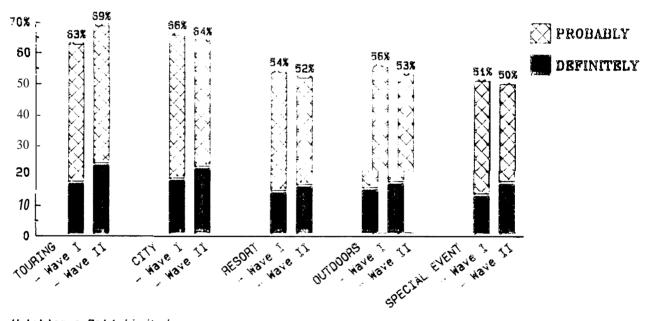


Source: Hutchinson-Reid Limited Tourism Canada Juna, 1986

LIKELIHOOD OF VISITING IN NEXT TWO YEARS Each Country by Any Trip Type - Boston -

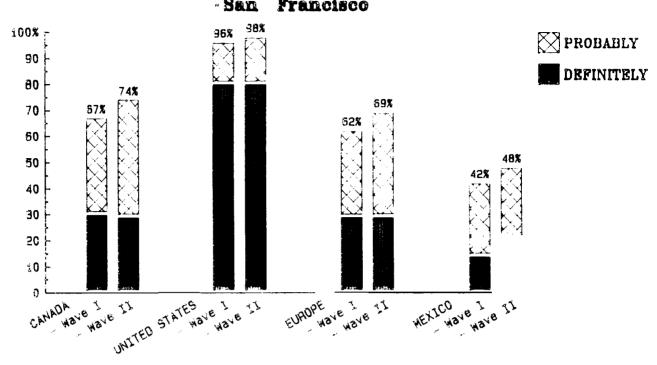


Canada by Trip Type - Boston -

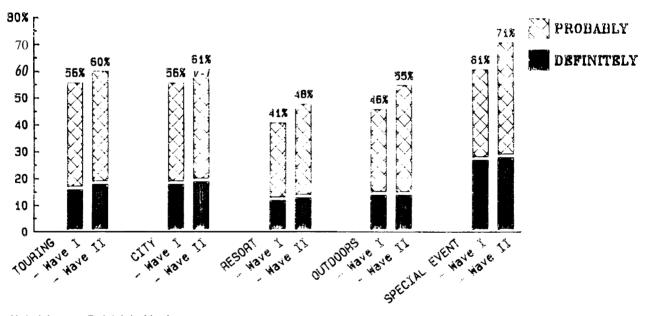


Source: Hutchinson-Reid Limited Tourism Canada June, 1986

LIKELIHOOD OF VISITING IN NEXT TWO YEARS Each COUNTRY by Any Trip Type San Francisco



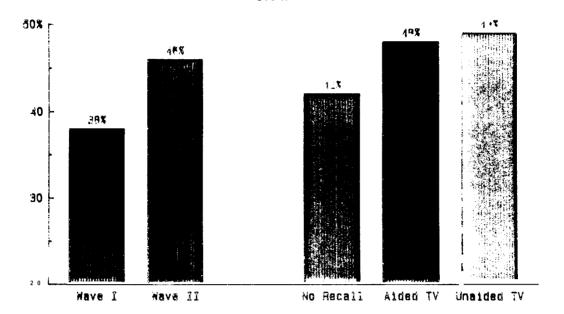
Canada by Trip Type - San Francisco -



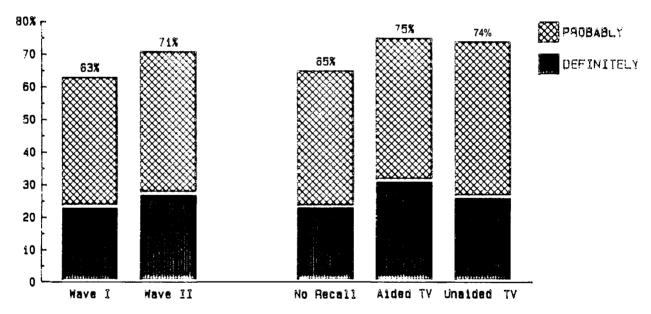
Source: Hutchinson-Reid Limited Tourism Canada June, 1986

EFFECT OF ADVERTISINGS

TOTAL (UNAIDED) MENTION OF CANADA AS A VACATION DESTINATION BY LEVEL OF TV ADVERTISING AWARENESS—New York—

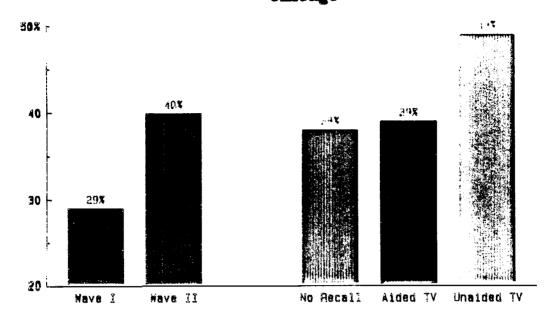


LIKELIHOOD of visiting canada in next 2 years by level of tv advertising awareness — New York —

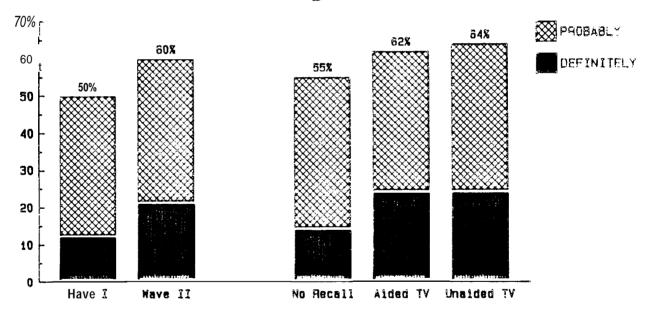


Source: Hutchinson-Reid Limi ted Tourism Canada June, 1986

TOTAL (UNAIDED) MENTION OF CANADA AS A VACATION DESTINATION BY LEVEL OF TV ADVERTISING AWARENESS—Chicago—

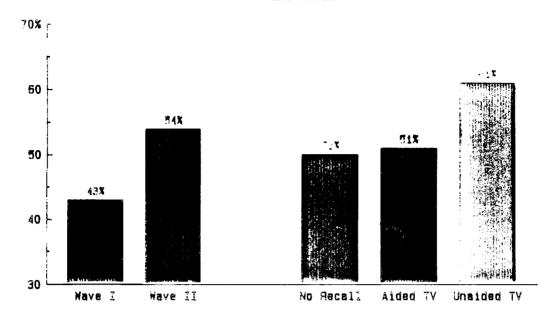


LIKELIHOOD of visiting canada in next 2 YEARS by level of tv advertising awareness - Chicago -

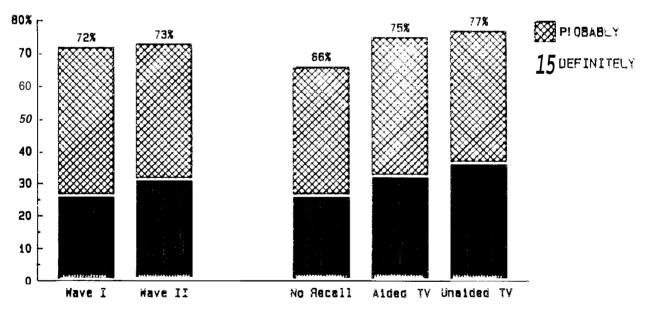


Source: Hutchinson—Reid Limi ted Tourism Canada June, 1986

TOTAL (UNAIDED) MENTION OF CANADA AS A VACATION DESTINATION BY LEVEL OF TV ADVERTISING AWARENESS - Boston

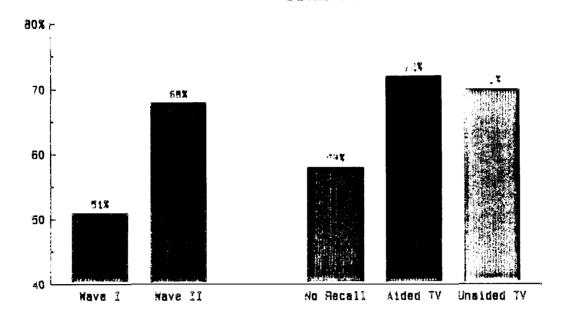


LIKELIHOOD OF VISITING CANADA IN NEXT 2 YEARS BY LEVEL OF TV ADVERTISING AWARENESS BOSTON -

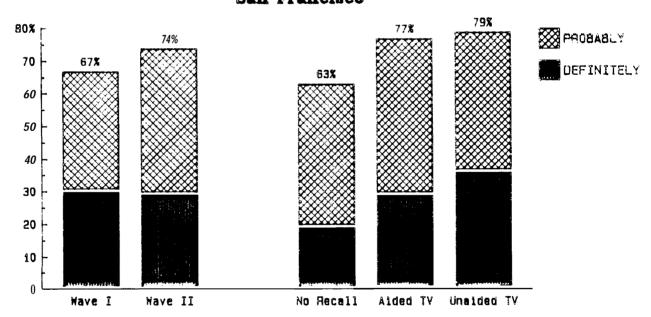


Source: Hutch Inson—ReldLimited Tourism Canada June, 1986

TOTAL (UNAIDED) MENTION OF CANADA AS A VACATION DESTINATION BY LEVEL OF TV ADVERTISING AWARENESS — San Francisco



LIKELIHOOD OF VISITING CANADA IN NEXT 2 YEARS BY LEVEL OF TV ADVERTISING AWARENESS - San Francisco



Source: Hutchinson-Reid Limited Fourism Canada June, 1986