



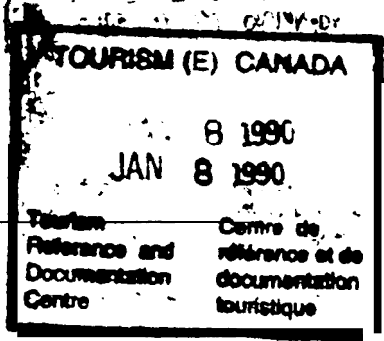
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***Tourism Canada - U.s.a. Advertising Tracking
Study***

Type of Study: Analysis/review Author:

Canada - Tourism Canada

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11-10-3.

TOURISM CANADA
U.S.A. ADVERTISING TRACKING STUDY
1989
- A Research Report -

Prepared for: Tourism Canada
Prepared by: Angus Reid Group
December, 1989

A53/068
Research
Report
Dec. 1989

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TABLE OF CONTENTS

	<u>page</u>
1. Introduction	1
2. Objectives	3
3. Methodology	4
4. Summary of Results	5
5. Comment	9
6. <u>Main Findings</u>	
A. Impact of the Advertising	11
i) Spontaneous Awareness of Canada	11
ii) Likelihood of Visiting Canada	13
iii) Canada's Image as avocation Destination	15
B. Awareness and Recall of Advertising	18
i) Awareness of Advertising	18
ii) Thoughts and Feelings on the Advertising	22

APPENDIX

Technical Appendix
1989 Post Print Questionnaire

1. INTRODUCTION

Canada **has much to offer the world** as a primary destination for a pleasure trip. In 1986, the Canadian government-initiated a strategy to communicate this message to selected target markets, within the United States. With the input of Camp Associates Advertising Ltd., a multi-media advertising campaign was launched south of the border, in the Spring of 1986, with the intention of attracting more U.S.A. visitors to Canada. This campaign was titled "Canada, the World Next Door" and has recently completed its fourth year of execution.

The Angus Reid Group (formerly Hutchinson-Reid Ltd.) has been commissioned since the Spring of 1986, to conduct pre and post advertising studies to assist in evaluating the campaign's effectiveness. This report describes the 1989 survey results and presents highlights of key measures from all four years of advertising tracking.

The communications strategy has undergone changes with regard to creative and media components since its inception in 1986. From March 3 to May 12, 1986, the Tourism Canada campaign consisted of three different television ads (each promoting a different perspective of Canada), twelve double-page magazine ads (each promoting a regional image while maintaining a common theme), several co-op newspaper ads as well as radio advertisements and public relations activities. In August, 1986, two of the three television ads were rebroadcast. In 1987, the successful "Canada, the World Next Door" campaign was maintained with only minor modifications.

In 1987, the campaign still consisted of three different television executions, each promoting a different perspective of Canadian Tourism. There was a continuation of the mix of television, magazine and newspaper ads. As well, the geographic strategy (New York, Boston, Chicago, San Francisco), did not vary. There were, however, some changes in media scheduling. The total weight of the T.V. campaign was maintained, but the 1987 commercials were run an additional seven weeks (May 12 to June 30) and the 30-second T.V. commercials were given greater emphasis in the mix of 30 and 60-second spots.

In 1988, the **television** creative was modified in reaction to 1986 and 1987 research findings. The result was two 30-second composite executions that gave less emphasis on wilderness and outdoor attributes and more **emphasis** to touring, foreign **flavour** and exciting city dimensions. Media scheduling also differed from previous years in two major ways:

- **there was a media flight** to coincide with the Calgary Olympics in February, 1988; and
- the print **schedule** was extended for six weeks after the **end** of the T.V. flight.

1989 saw no changes in the **creative** with both the “Trapeze” and “Rodeo” executions receiving equal media weight. T.V. advertisements were again supported with a magazine and newspaper print campaign. The print campaign extended four weeks past the **end** of the T.V. flight.

Consistent with Tourism Canada’s original commitment to evaluation research, there was a need to **determine** the impact of the advertising on American’s intention to vacation in Canada. To realize this objective, the Angus Reid Group, for the fourth consecutive year, was commissioned to design and **implement** a survey of American opinion.

The details of this study are presented in the following document. The report first discusses specific objectives of the research, the methodology and then summarizes the findings and outlines our comment *on the* implications of the data. The detailed findings consists of a section on the impact of the advertising supported by a section on **awareness** and recall of the advertising. The report concludes with an Appendix, which contains a Technical Appendix and the 1989 post-questionnaire.

2. **OBJECTIVES**

The overall objective of the research was to determine the effectiveness of Tourism Canada's 1989 Spring advertising campaign in the United States. The objectives set in 1986 have **remained** constant to ensure comparability for tracking purposes. Specifically, the 1989 study was designed to examine:

- awareness of Canada as a viable tourist destination;
- awareness of advertising for Canada;
- the nature and extent of advertising recall;
- * attitudes toward Canada as a desirable tourist destination;
- * the intention to vacation in Canada within the next two years;
- a diagnostic evaluation of each element of the campaign;
- * to compare 1989 results with those of 1986, 1987 and 1988.

As in 1988, the 1989 research also focused on assessing activity in the marketplace during the advertising campaign. **This assessment** Covered the topics of competitive tourism destination advertising and the occurrence of any special event which might affect the tourism market.

3. METHODOLOGY

The research methodology used to track the "World Next door" campaign has been consistent across all four years (1986-1989) of the study. Equal numbers of telephone interviews were conducted in four cities across the United States. The four cities - Boston, New York, Chicago and San Francisco/Oakland - represented distinct markets, each with its own unique tourism issues.

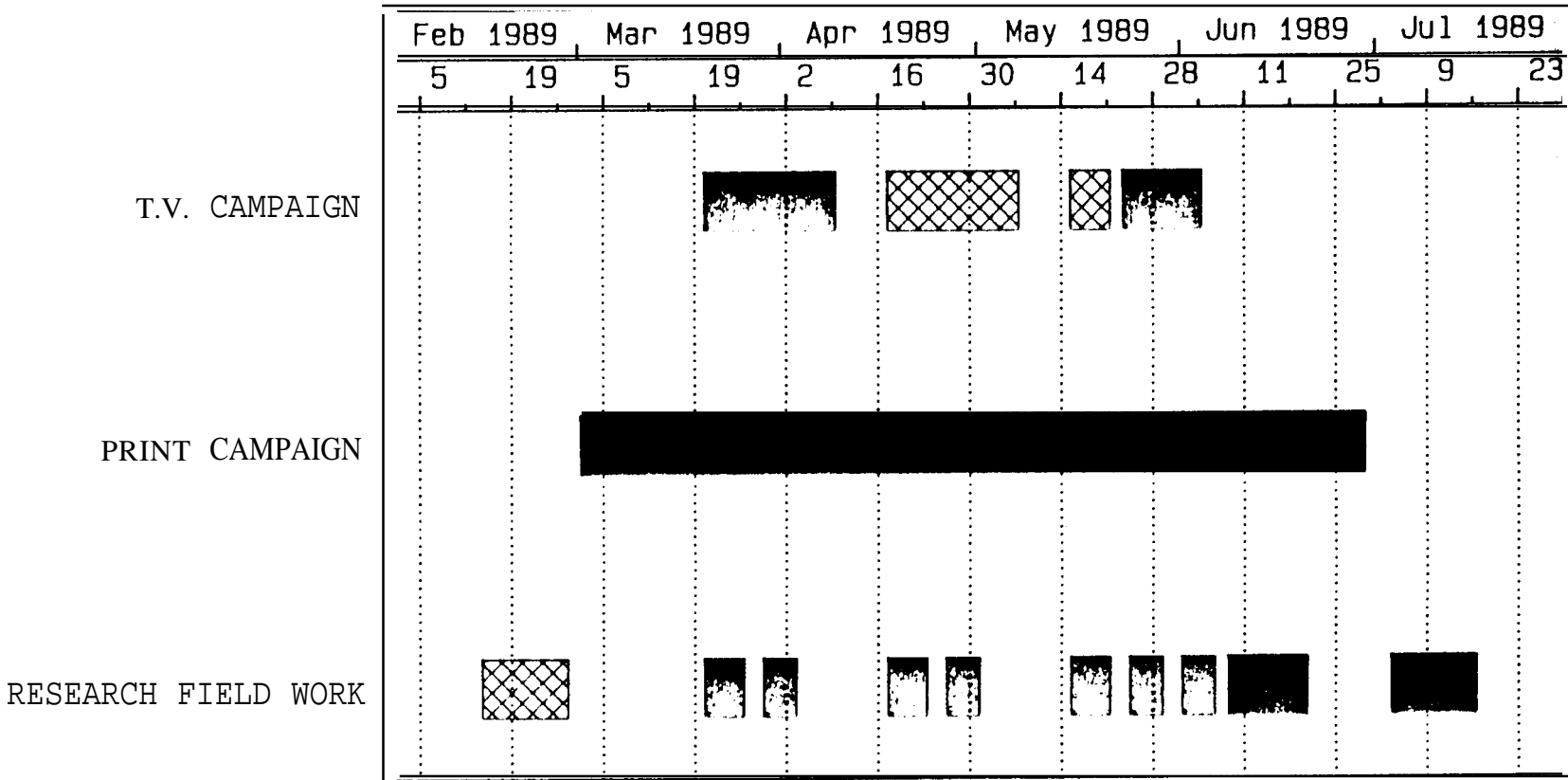
In each market, interviews were conducted before, during and after the campaign. Pre-campaign interviews were used as a benchmark against which changes in the intra and post-campaign data could be measured. As well, the pre-campaign interviews were used to measure existing media "noise" levels.

In 1988, the concept of an intra-campaign was introduced to reflect changes in the media scheduling, and to address issues which could not be measure on a pre-post test basis. This methodology produced some interesting and useful information, and was incorporated into the 1989 study. Subsequent to the intra-campaign, too separate post waves were conducted. The first post-test measured the impact of T.V. advertising, while. the second measured the impact of the print advertising.

In total, 5500 telephone interviews were collected in 1989. 1600 interviews were collected at the pre-test stage, with a similar number conducted after the television campaign and after the print campaign. This represents 400 interviews per wave per city. During the television campaign, 25 interviews per week (7 weeks) per city were collected for a total of 700 interviews.

The pre-wave was conducted in the two weeks (February 13-28) prior to the start of any advertising. The intro-campaign spanned seven weeks (March 20-April 3, April 17- May 1, May 15 - June 5) during the television campaign. Post television interviews were completed within two weeks of the end of the campaign (June 5) with post print interviews starting at the end of the print campaign (July 4) and continuing for two weeks (See Media and Research Schedule).

MEDIA AND RESEARCH SCHEDULE



SOURCE: The Angus Reid Group
 1989 U.S. A. Ad Campaign
 June, 1989

NOTE: Primary Markets

4. **SUMMARY OF RESULTS**

A. **Impact of the Advertising**

1. Spontaneous awareness of Canada showed no **increase in** awareness after the advertising campaign **in** 1989. In fact, the Post levels were at **their** lowest **point** since tracking began.
2. There has been a consistent decline since September '86 **in** the Post TV measures of spontaneous awareness of Canada (from 38% - Sept. '86 to 32% - June '89).
3. In 1988, awareness of Canada for city trips increased significantly after the campaign. In 1989 there was no increase from the February '89 levels.
4. Similarly, spontaneous mention of Canada for touring trips increased in Post-measures from 1986 to 1988. However, it decreased in Post 1989 to its lowest level ever.
5. There is no significant change, 1988 to 1989 in spontaneous awareness of Canada for an outdoors trip. In July **1989**, Canada was first for spontaneous awareness on outdoors trips, next for a touring trip and last for a city trip.
6. The overall lack of increase in spontaneous awareness in 1989 compared to 1988, could be attributed to the **lack** of growth in the proportion of city trip mentions in 1989.
7. Total likelihood (both definitely and probably) of visiting Canada increased in both post measures from the **Pre-wave**, (February 1989). Nevertheless, since 1986, the level of definite likelihood on a post basis has consistently declined.

8. **Unlike 1988**, there was a **decline from** Post TV to Post **Print**(June '89 to **July '89)** **in city** and outdoors **trips**. However, Europe **declined** on all three **trip** types **in** July 1989 compared to June '89.
9. In the **Intra** and Post campaign waves, Canada was perceived to be becoming more popular than **in** the **Pre** wave/February '89. The advertising appears to have influenced the popularity of **city trips** and touring **trips** before impacting outdoors **trips**.
10. On the **main image** attributes tracked from February '86, the only one to continue to increase in 1989 was "interesting cities". All others **levelled** off or declined from the 1988 Post levels.
11. Since 1987, the "interesting cities" dimension has increased from **pre** to post each year and has maintained its growth from one **pre** wave to the next.
12. Canada's image of being exciting and having first-class nightlife has increased **since** 1987, however, "different from the U.S." strengthens on a **pre-post** basis when advertising is running.
13. Specific image issues tracked in 1989 which increased include: "variety of restaurants", "regional personalities", "**close** for visiting", and "good climate". Nevertheless, "vacation value decreased and "popularity" remained constant.

B. Awareness and Recall of the Advertising -----

14. Awareness of advertising for Canada was at **its lowest point** ever in February 1989. **During** the "Pre" wave, only 48% of respondents **indicated** on a prompted **basis** that they were aware of any advertising for Canada.
15. In the Post-waves of all years (1986, '87, '88 and 1989) prompted **advertising** has **maintained** a consistent level of around 60%.
16. Prompted awareness of advertising increased **during the** campaign in 1989. However, the levels reached in 1988 were **higher** than those in 1989.
17. Spontaneous awareness of advertising for Canada peaked in the last week of April 1989. In the last week of May, 1989, spontaneous awareness of advertising for Europe was equal to that of Canada.
18. Total aided **recall** of the **two** executions was slightly **higher** in 1989 than in 1988.
19. In 1989, as in 1988, Trapeze was recalled **significantly** more often, on an **aided basis**, than Rodeo.
20. **When** the TV flight was finished, **recall** of **print** advertising increased. When the **print** campaign ended, **recall** of TV rebounded.
21. Recall of the slogan continued to **increase on a spontaneous and aided** basis in 1989. Spontaneous **recall** declined slightly in the Post **Print** wave in both 1989 and 1988.
22. Positive thoughts about the TV advertising increased in 1989, however, positive thoughts specifically about Canada decreased significantly. Thoughts and feelings were at their highest level ever about **executional** issues.

23. **Negative thoughts about** TV ads also increased **significantly in** 1989 and most of the increase **in** negative thoughts were of **executional** issues.
24. Negative thoughts on the magazine ads increased slightly **in** 1989, compared to 1988, whereas negative thoughts about the newspaper ads decreased slightly (neither of these changes were **significant**).
25. **In** 1986, **multivariate** analysis showed Canada's **image** indicated each of the three TV ads were **driving** a number of different **image** issues. **In** 1989, the TV executions were **driving** only **image** attributes - "good nightlife" and "different from U.S.A.". Trapeze was **driving** "nightlife" whereas both ads were **driving** "different from U.S.A.".

5. **COMMENT**

Over the past three years, Tourism Canada appears to have faced an **uphill battle in bringing** American tourists to Canada. Overall there has been a downward trend **in** the number stating they were 'definitely **likely** to come to Canada'. The **significant impact** of **the** special events **in** 1986 and 1988 have diffused **this issue in** the **past**. One could hypothesize that Americans have been becoming more successful at developing and/or promoting **their** own tourism products over the past few years, but other scenarios are also possible.

Nevertheless, after advertising, there has been an average 10% increase **in** the **level** of mentions of "definitely **likely** to **visit** Canada". **Similarly**, "unaided, **aided** and non-recall" levels descend **in** approximate harmony for most **impact** measures. Thus, the presence of advertising appears to make a **significant** difference.

Whatever the reason for the long term, downward trend in "definite likelihood", action is required to arrest the decrease. The campaign in the Spring planning season may not be sufficient to reverse this trend. It may require advertising in shoulder seasons. With the general lessening effect of the campaign, a more forceful, "sell-oriented" campaign **might** be required to achieve **this** goal. Some Americans seem to appreciate a good hard sell. **However**, it may **well** be that a new creative concept with strong messages might make the most impact. One can conclude, the first year; 1986, was the most successful **in this** regard, when comparing survey results over the past four years.

There have been improvements over the years which, apparently, has gone some measure in "squeezing more juice" out of the campaign. The reanalysis of the data sets from all waves of the tracking surveys in the past four years has shown refinement in the media buy and strengthening of some of the print-oriented images. A **static** campaign may have shown a **build in** negative images.

The reanalysis also identified the relative importance of the frequency and variety of trips a **traveller** takes. These issues appear to be more important targeting criteria than age, income and education demographics. Even so, targeting is clearly important in maximizing the return from the **media** dollars spent. **Nonetheless**, we wonder if anything can replace the impact of just a bigger media spend - the type we saw in the special event years of 1986 and 1988.

1990 will be an important cornerstone in our understanding the impact of advertising in the U.S.A. The new campaign will highlight the relative importance of new creative. Research we have conducted on other products has suggested that new creative executions for a brand tends to increase "familiarity" with that brand. in turn, "familiarity" tends to breed good will and usage intention. For most brands, "familiarity" is the attribute most closely associated with usage intention. After measuring the decrease in impact, as the previous campaign became "old", the 1990 campaign should be able to help determine priorities in the future.

6. **MAIN FINDINGS**

A. **Impact of the Advertising**

In this report, **impact** of the Tourism Canada advertising is compared on three dimensions. These measures are:

- spontaneous awareness of Canada as a vacation destination;
- likelihood of visiting Canada;
- * Canada's image as a vacation destination.

(i) **Spontaneous Awareness of Canada**

Overall, spontaneous awareness of Canada as a vacation **destination did not** show a **significant** increase after the advertising campaign in 1989. Unlike growth patterns in previous years, where on a **pre-to-post basis** awareness levels rose 7 and 8 percentage **points** (1986 and 1988), awareness levels in 1989 saw a 2% **rise in** the post T.V. measure **slipping 1% in** the post-print measure. (Table #1)

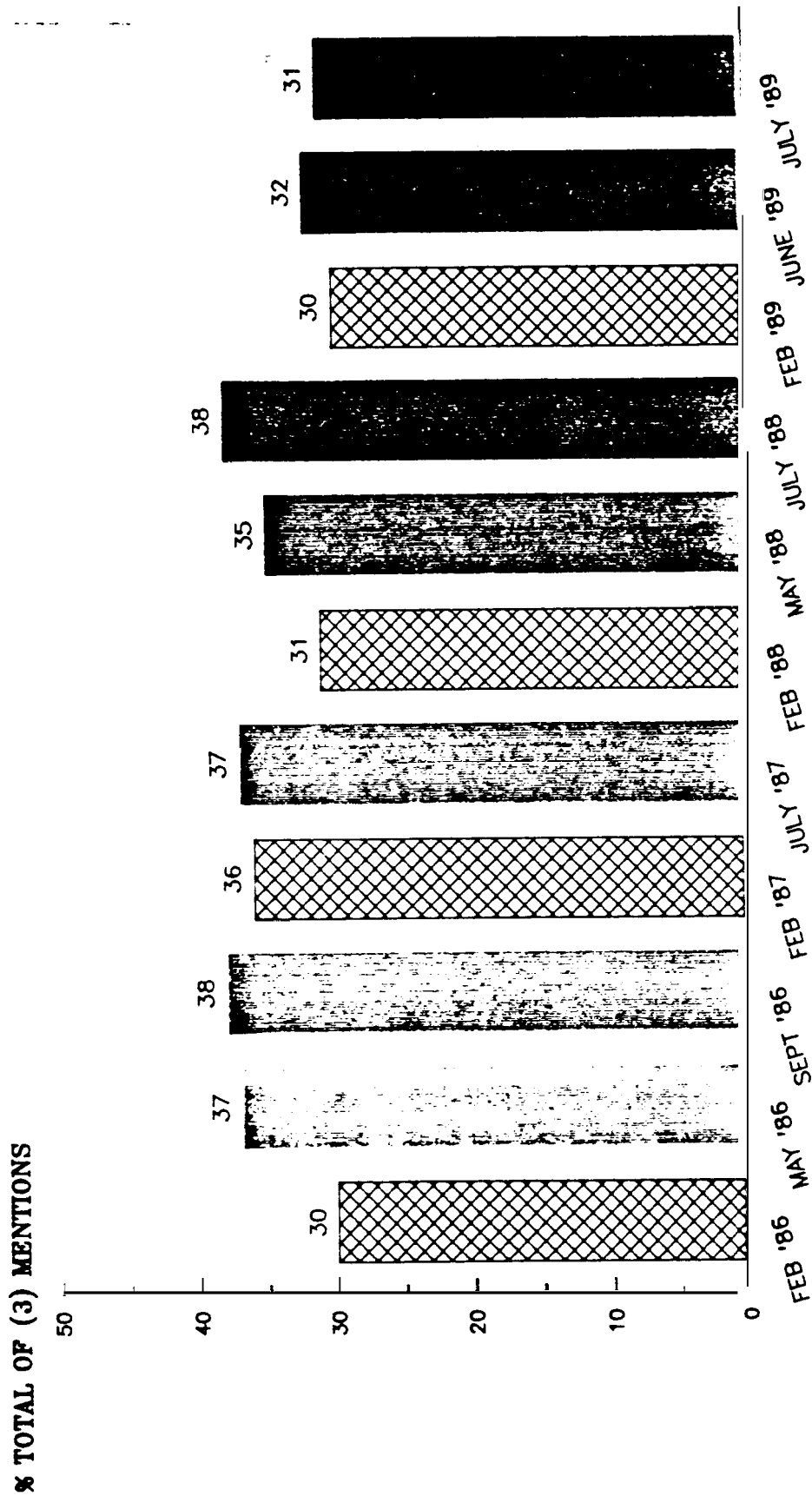
Not only did post levels of awareness not show an increase in 1989 but, in fact, post levels reached **their lowest point ever since** tracking began in 1986. **This finding is consistent with** the downward trend in post-T.V. measure for spontaneous awareness of Canada **since** 1986 (from 38% - Sept. '86 to 37% - July '87 to 35% - May '88 to 32% - June '89).

in 1989, New York and San Francisco recorded negligible increases in spontaneous awareness of Canada as a vacation destination when comparing pre to post-print levels. Awareness did increase immediately following the television campaign, however, the effect was short-lived.

The most dramatic shift **in** awareness this year occurred in Boston and Chicago. Awareness levels in Boston showed a steady increase from 26% in February to 33% in June to 37% in July. In Chicago this trend was reversed. February registered a 42% awareness level (16% higher than **all other cities**) dropping to 35% in June and 32% in July.

TABLE 1

**SPONTANEOUS AWARENESS OF CANADA
AS A VACATION DESTINATION
(All Cities/All Respondents)**



SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

Spontaneous awareness of Canada **by trip** type has shown significant changes over the past four **years**. For example, in February 1986 the trip type least associated with Canada **was** consistent throughout all four years of the study. In post measures from 1986 to 1988 **city trips** have increased in mentions each year reaching its highest awareness level ever in July 1988. At this point city trips were mentioned more often than touring or outdoor trips. 1989 awareness levels showed no significant change between February and June/July measures. (Table #2)

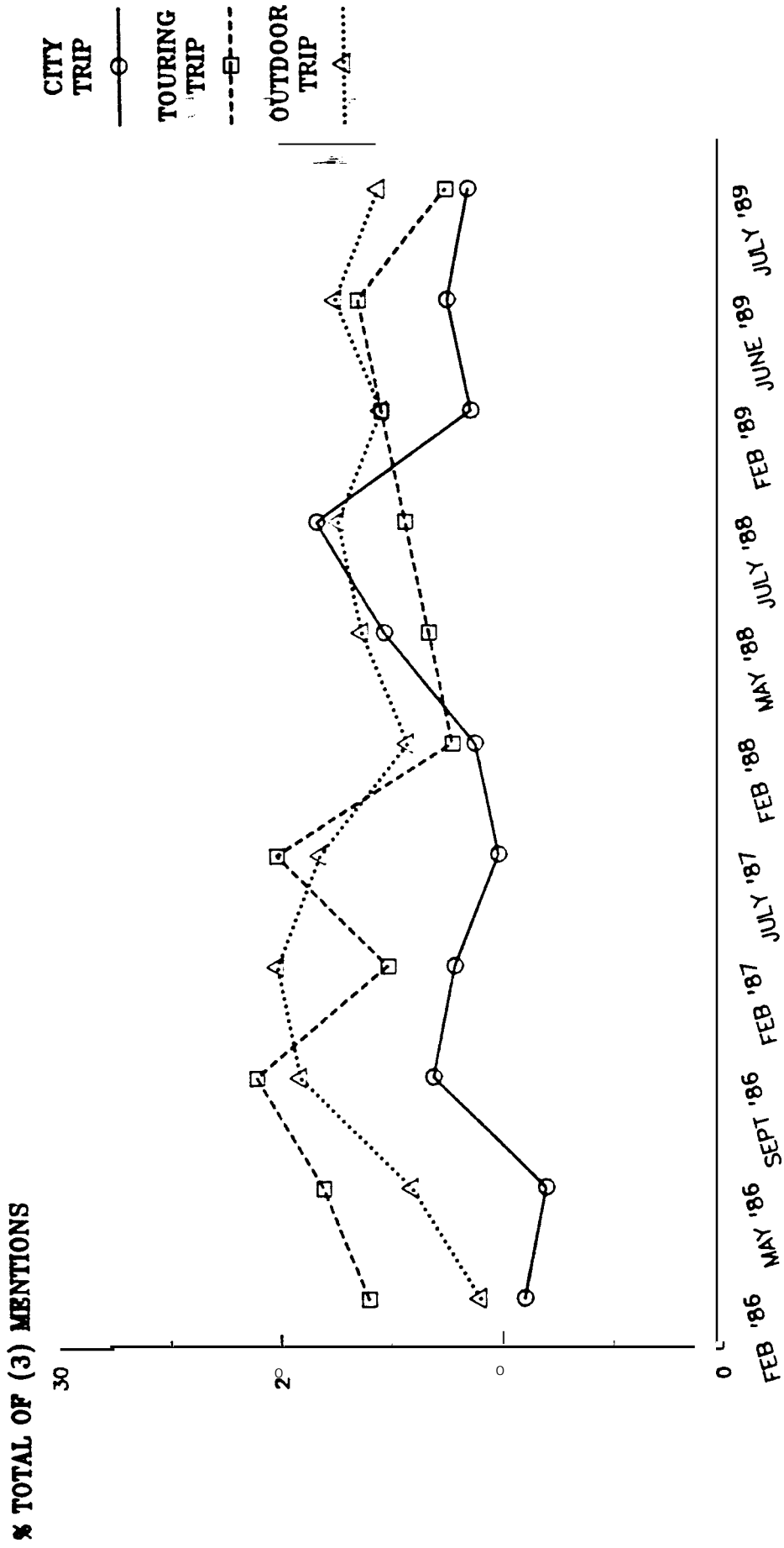
In February, 1986 the trip type most closely associated with Canada was a touring trip achieving a 16% level of awareness. In each of the three years since then, there has been an increase, after the television campaign, in mentions of Canada for touring trips. In July, 1989, however, there was a significant decrease in awareness to its lowest level ever.

Mentions of Canada for an outdoor trip increased most significantly after the first year of advertising in 1986. Over that first year, mentions of Canada almost doubled. Similar to touring trips, mentions for outdoor trips increased from pre to post advertising measures. This, however, was not true for 1986. From 1988 to 1989 there **was** no significant change in spontaneous awareness of Canada for an outdoors trip.

It would appear that the advertising campaign in 1986 significantly increased Americans' awareness of Canada which, initially at least, was most closely associated with outdoors trips. 1988 was a significant year for driving Americans' perceptions of Canada as a destination for a city trip. Overall in 1989, all three trip types showed an increase in spontaneous mentions after the television campaign but **decreased** to pre levels or lower after the print campaign was **concluded**.

When compared to 1988 results, the **difference** in pre to post share of total trip type mentions in 1989 is relatively uneventful. Before the advertising in February 1988, the **largest** share of mentions for Canada came from outdoors trips. By July, 1988 the **largest** share of mentions for Canada came from city trips. In 1989, the only measurable difference in share of mentions appeared in June (post T. V.) where outdoor trips increased only slightly at the expense of city and touring trips. (Table #3)

TABLE 2
SPONTANEOUS AWARENESS OF CANADA
- BY TRIP TYPE -
(All Cities/All Respondents)

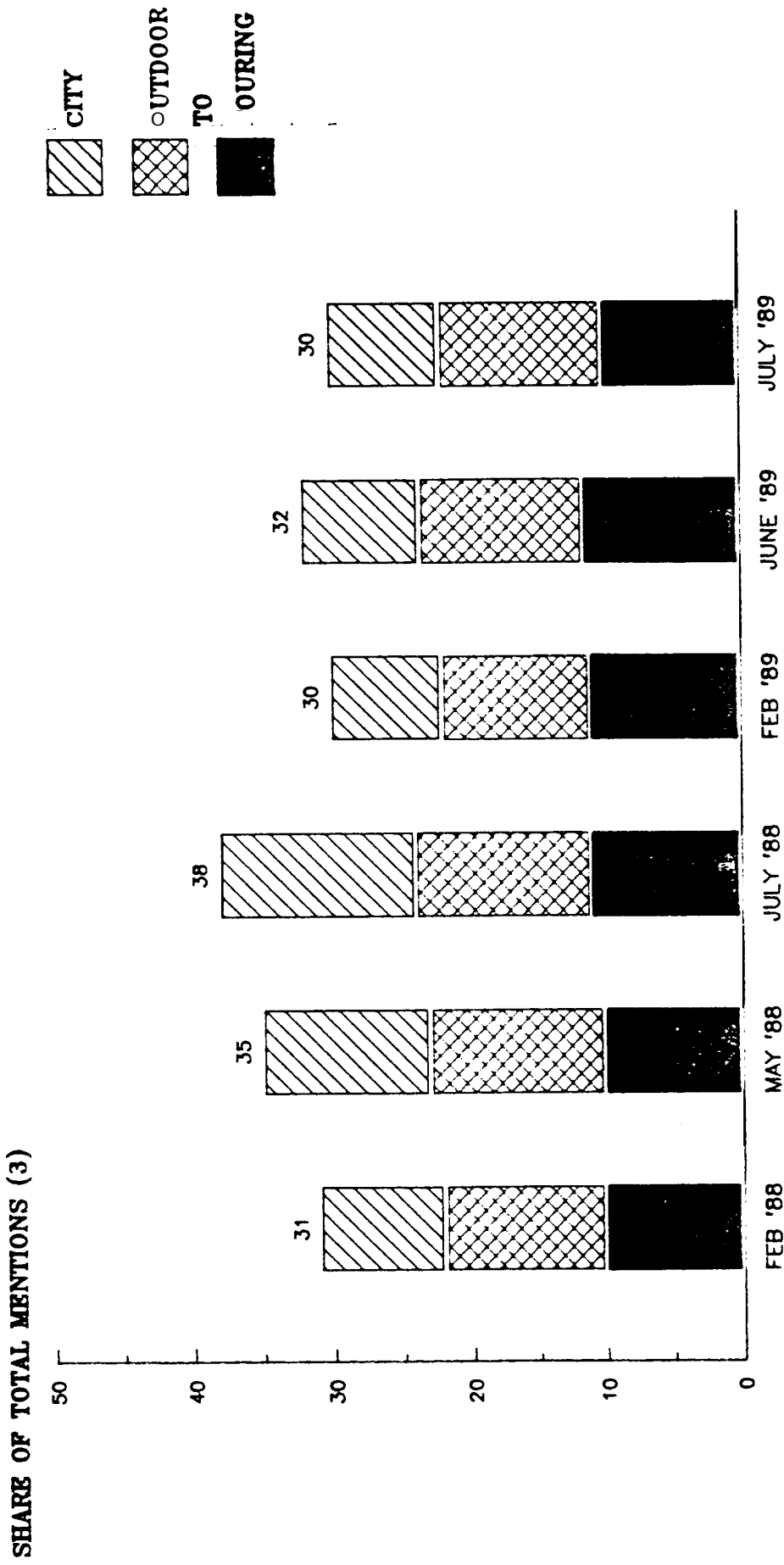


INTERVIEW SCHEDULE

Angus Reid Group
 U.S.A. Ad Campaign
 October, 1989

TABLE 3

SPONTANEOUS AWARENESS OF CANADA AS A VACATION DESTINATION BY TRIP TYPE (All Cities/All Respondents)



INTERVIEW SCHEDULE

Angus Reid Group
U.S.A. Ad Campaign
October, 1989

(ii) Likelihood of Y & & f & d a

Overall, the likelihood of visiting Canada (amongst likely travellers in the four cities) has not changed significantly in the past four years except when there were special events in Canada. This pattern for likelihood was similar to the pattern of spontaneous awareness of advertising for Canada. (Table #4)

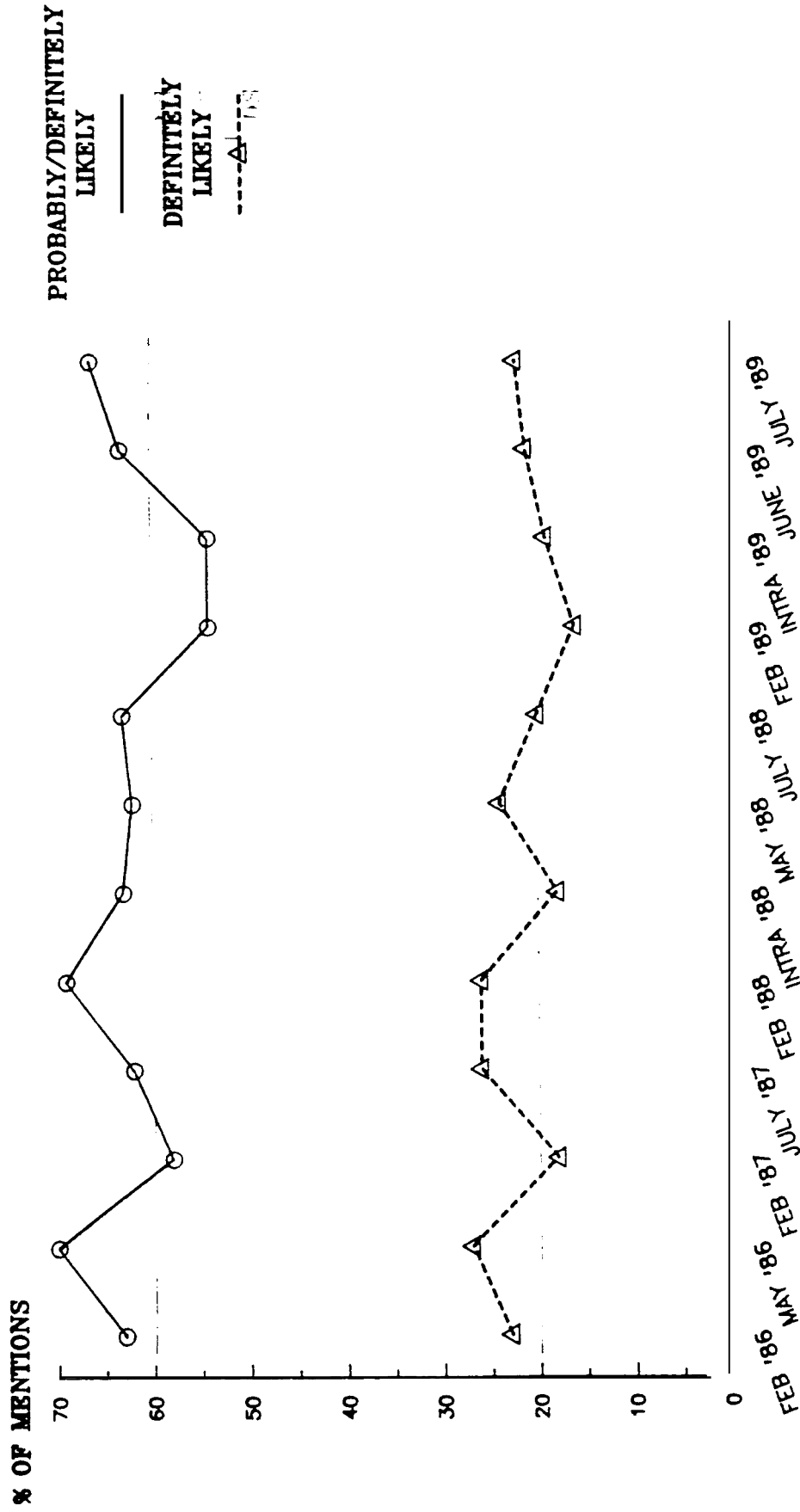
In 1986, 1987 and 1989 the number of travelers stating they were definitely likely to visit Canada was higher after the campaign than before the advertising. In February, 1988 the proportion of travellers stating their intention to visit Canada reached a percentage equivalent to post-levels of all four years (1986-1989). This anomaly in the data can possibly be explained away by the 1988 Winter Olympics in Calgary. The decrease in definite likelihood of visiting Canada in the summer of 1988 could possibly reflect a natural let-down or lower interest after the occurrence of a special event.

There was no special event held in Canada in 1987 or 1989. The "likelihood" data reflects the intentions one would expect to find as a result. That is, all post measures indicate a greater proportion of travellers definitely likely to travel to Canada than is found in the pre measures of the same year. It may be concluded then that exposure of travellers to the advertising is effective in influencing travel intentions. It is important to note, however, that while total likelihood (both definitely and probably) of visiting Canada increased in both post measures from the pre-wave (February 1989), the level of definite likelihood, on a post basis has been declining from year to year since 1986. (Table #5)

While the proportion of travellers likely (definitely and probably) to come to Canada has not shown any significant increases over the past four years, the data suggests the likelihood of a traveller taking more than one trip type to Canada has increased. The likelihood of a traveller coming to Canada for a city trip was highest overall in February of 1988. As well, likelihood for a city trip increased significantly after the advertising campaign in 1986, 1987 and 1989. On a post basis 1989 showed likelihood for a city trip to Canada to be at a level second only to February, 1988. (Table #6)

TABLE 4

TOTAL LIKELIHOOD OF VISITING CANADA PRE 1986 TO INTRA 1989 (All Cities/All Respondents)



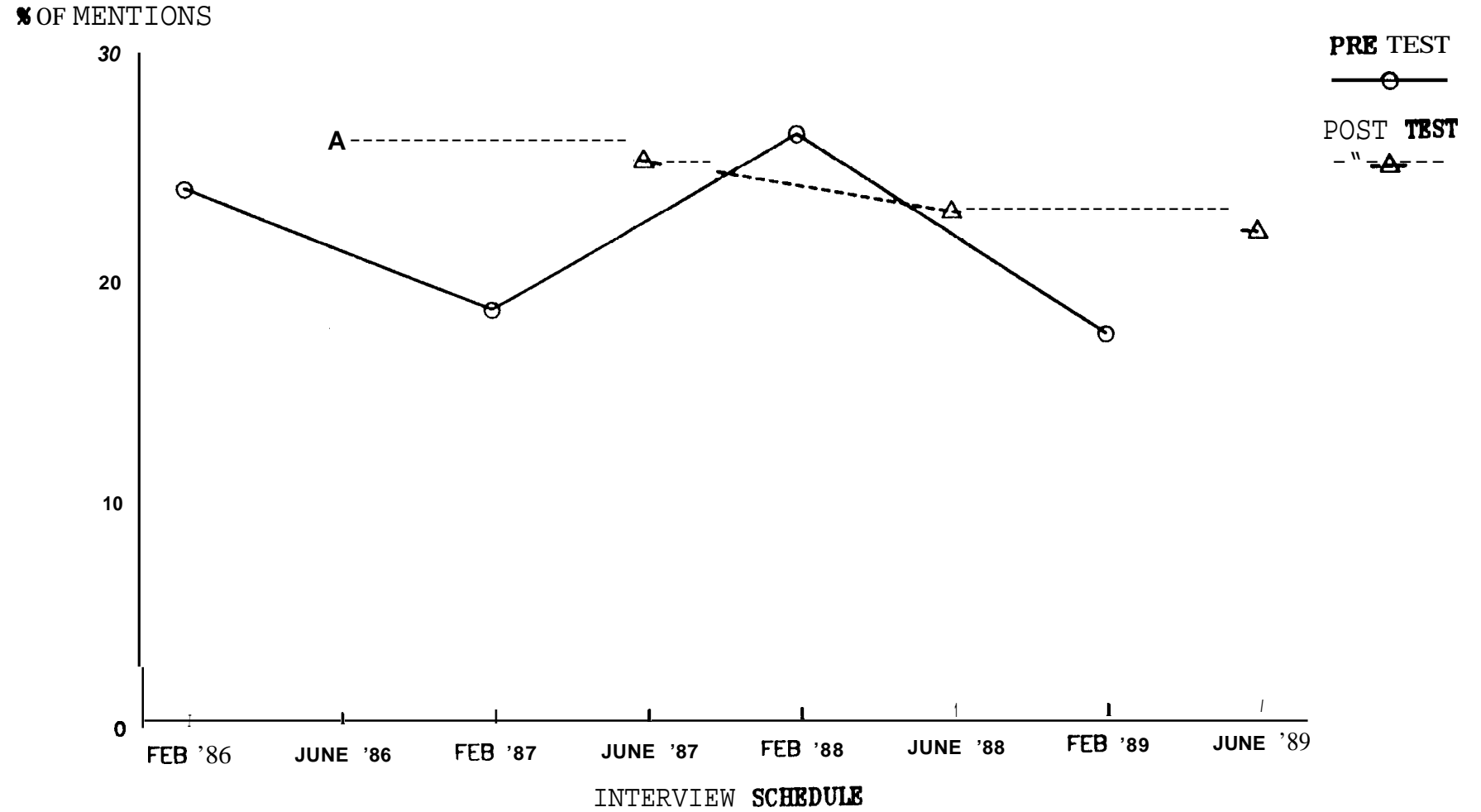
INTERVIEW SCHEDULE

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

NOTE: All Respondents Probably/Definitely Likely
To Take At Least One Trip Type

TABLE 5

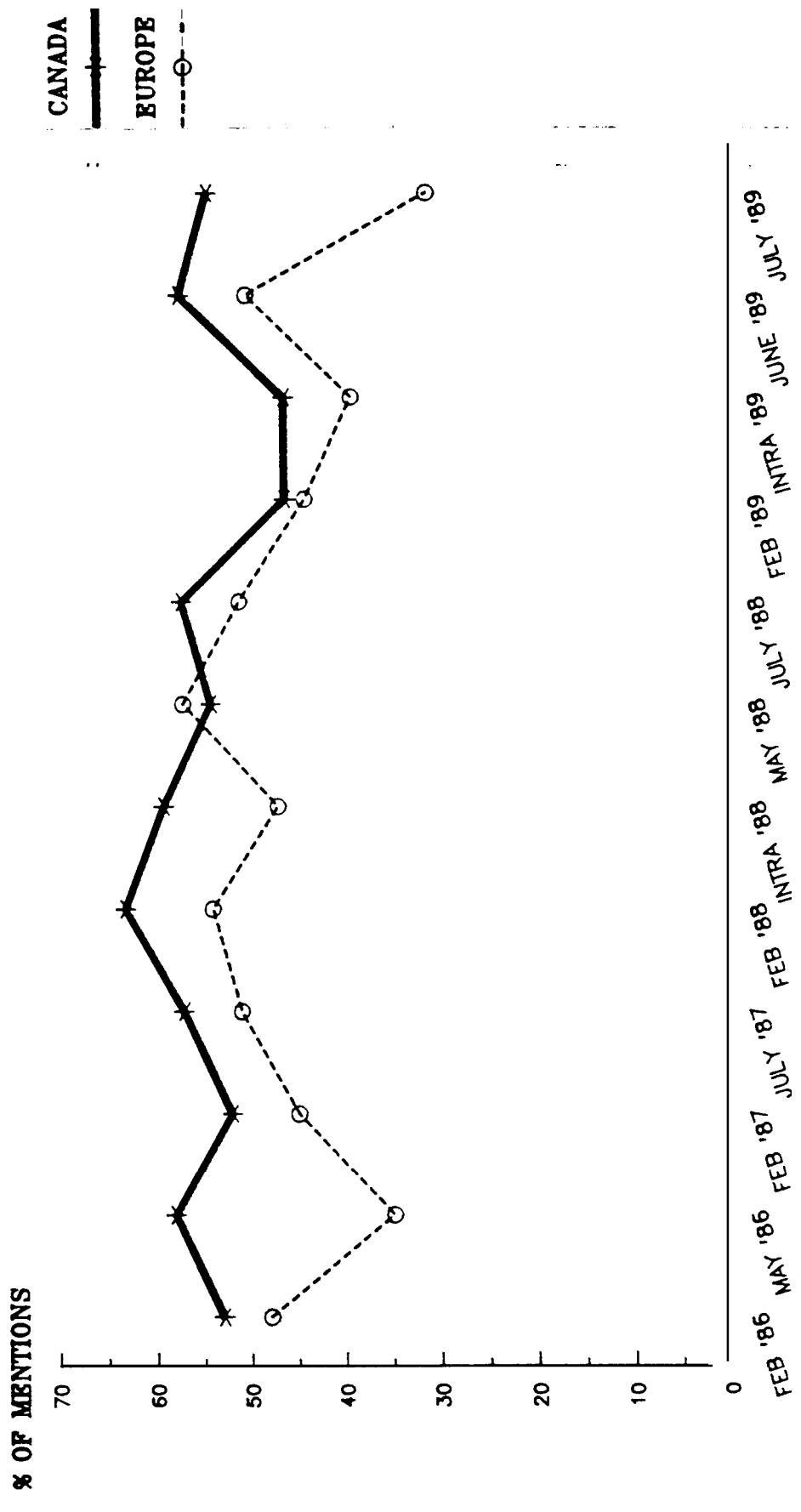
DEFINITE LIKELIHOOD OF VISITING CANADA PRE 1986 TO POST 1989 (All Cities/All Respondents)



SOURCE" Angus Reid Group
U.S. A. Ad Campaign
October, 1989

NOTE: All Respondents Definitely Likely To Take
At Least One Trip Type

TABLE 8
LIKELIHOOD OF VISITING CANADA/EUROPE
FOR "CITY TRIPS"
(All Cities/All Respondents)



INTERVIEW SCHEDULE

Angus Reid Group
 U.S.A. Ad Campaign
 October, 1989

Similarly, outdoor and touring trips both experienced increases in likelihood after the advertising campaign for every year measured except 1988. Likelihood of visiting Canada for an outdoor trip reached its highest level ever in June, 1989. Likelihood of visiting Canada for a touring trip was higher in 1989 than 1988 and similar to 1987 levels. Likelihood of touring reached its peak in May, 1986 prior to the opening of Expo in Vancouver. Thus, overall there appears to be a slight increase in intention by trip type amongst travelers even though there is no evidence of an increased proportion of travelers likely to come to Canada. (Table #7 and #8)

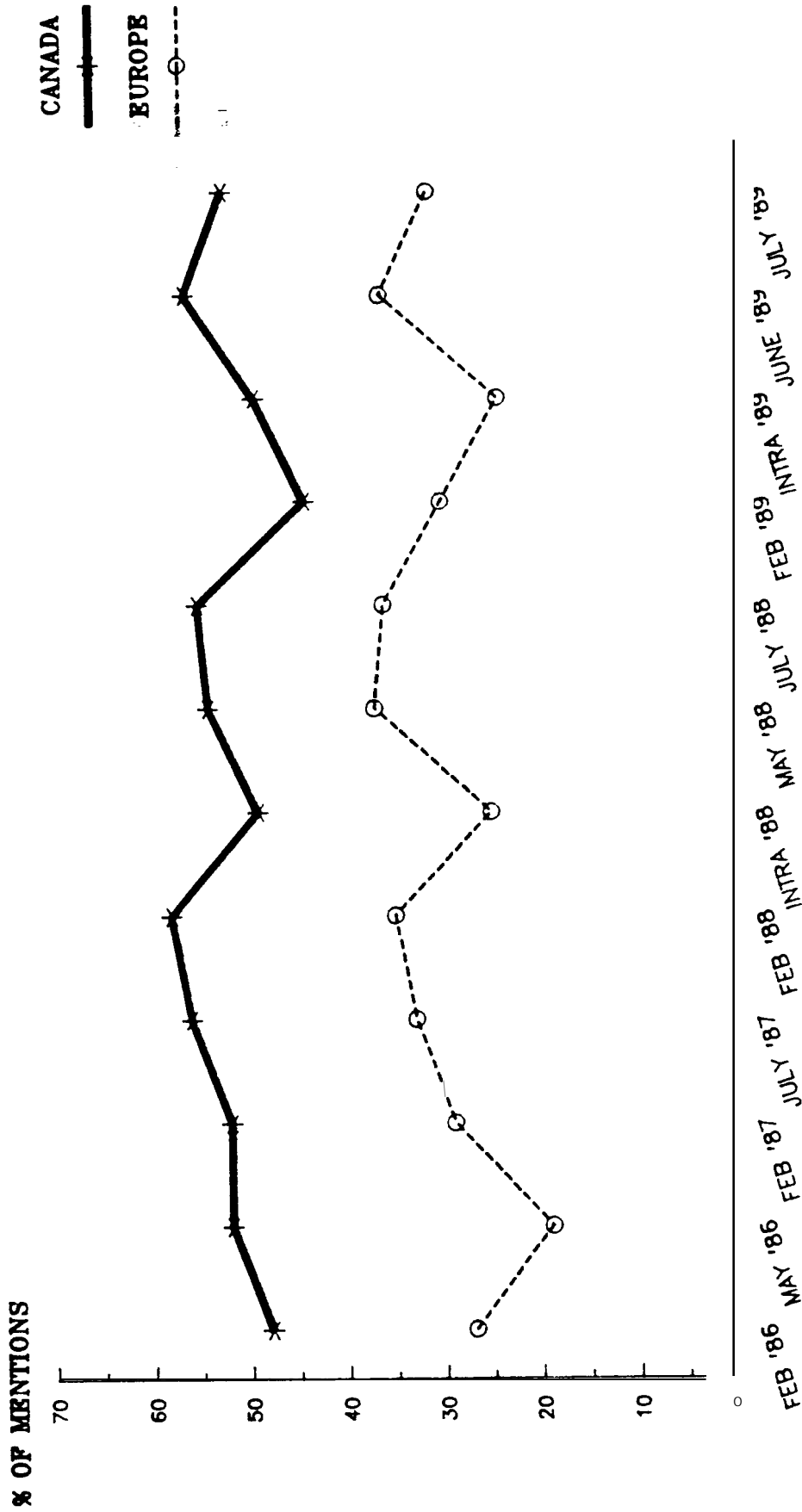
As of July 1988 it appeared that Europe, Canada's major competitor for American travelers, had made a remarkably recovery from low likelihood of travel levels recorded in May 1986. In all three trip types, likelihood levels of traveling to Europe were higher in 1988 than in February 1986. In 1989, likelihood of travel to Europe for a city trip followed the same general trend as Canada during every wave of the research. The pre-wave measure regressed to that of February 1987. July 1989 recorded the lowest level ever, sinking below the level of travel likelihood found in May, 1986. (Table #6)

Similar to Canada, the likelihood of travel to Europe for an outdoor trip also increased in 1989 continuing the general upward trend as measured on a post-advertising basis. With the exception of May 1986, levels of likelihood recorded for travel to Europe and Canada for a touring trip are very close. In 1989 this measure showed identical results in February and in June with Canada maintaining only a slight margin lead during the intra campaign and after the post-print wave in July. (Table #7)

Clearly, Canada's perceived advantage over Europe is in the outdoor trip market. 1990 may show Canada increasing its lead over Europe in likelihood of travel for a city trip. It will be a great challenge for Europe to bounce back from the drastic levels recorded in July 1989. With regard to touring trips, it appears that the promotion of a special event of international interest would be required to differentiate likelihood of travel to Europe from that of Canada. (Table #8)

TABLE 7

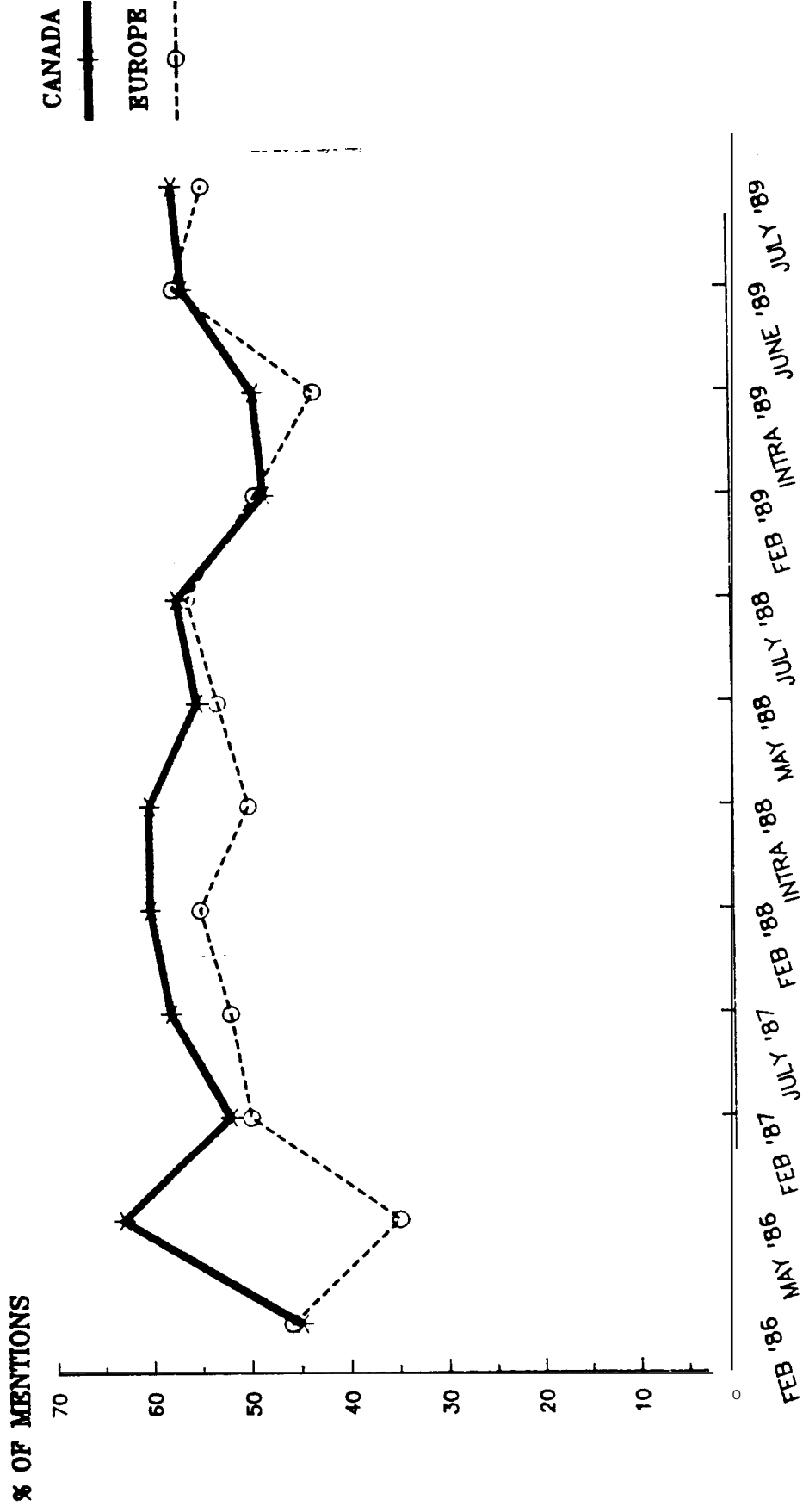
LIKELIHOOD OF VISITING CANADA/EUROPE FOR "OUTDOOR TRIPS" (All Cities/All Respondents)



SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

TABLE 8

**LIKELIHOOD OF VISITING CANADA/EUROPE
FOR "TOURING TRIPS"
(All Cities/All Respondents)**



INTERVIEW SCHEDULE

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

In 1989 respondents were asked ~~if Canada had become more popular, less~~ popular or remained the ~~same as a vacation destination (by~~ ⁴¹¹ ~~three trip~~ types) when compared to other possible destinations they could visit. Canada gained popularity as a destination for all three trip types between pre and post waves. The popularity of Canada as a destination for an outdoor trip showed a gradual increase in each consecutive wave. The advertising, however, appears to have had a greater impact on the popularity of Canada for city trips and touring trips. (Table #9)

When looked at on a city-by-city basis the two locations driving the increase in Canada's popularity are New York and Boston. The advertising appears to have had very little impact in the Chicago market on this measure and little, to no impact in the San Francisco market. Overall, the greatest impact of the advertising in each market was reflected in Canada's popularity as a destination for a city trip.

iii) Canada's Image as a Vacation Destination

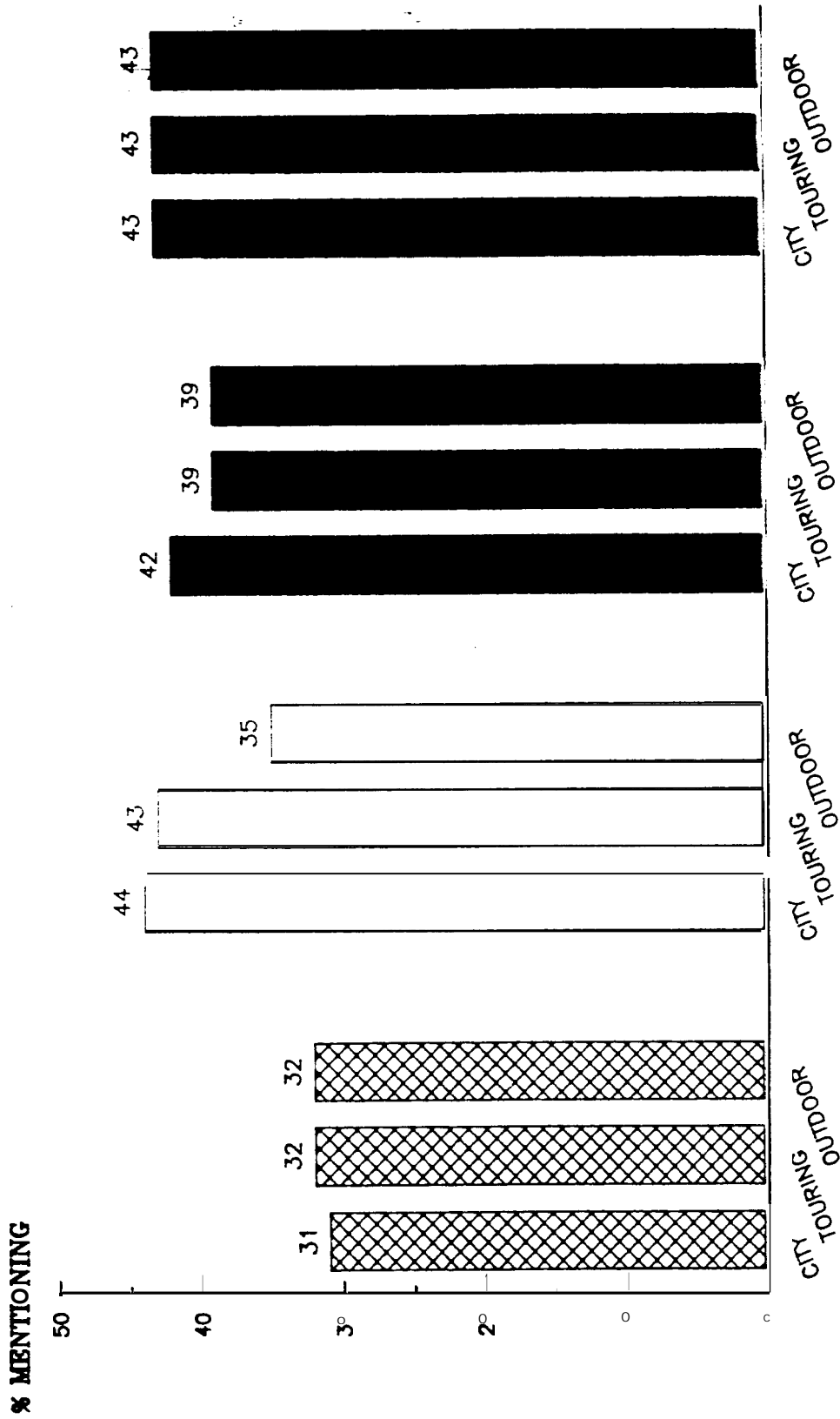
There has been a significant improvement in Canada's image as a vacation destination since the advertising tracking exercise began in 1986. All image attributes measured in the study have registered an increase since February of that year (Table #10 & #11). The most significant improvements have been seen in the following attributes:

- Interesting Cities
- * Exciting
- Playful
- Nightlife
- Different from U.S.

In 1989, the only key image attribute that continued to increase was "interesting cities" (Table #10). All other attributes either levelled off or decreased from 1988 Post levels. Since 1987 the "interesting cities" dimension has increased from pre to post each year and has maintained its growth from one pre wave to the next (Table #12).

TABLE 9

**POPULARITY OF CANADA BY TRIP TYPE
BEFORE, DURING AND AFTER THE CAMPAIGN
(All Cities/All Respondents)**

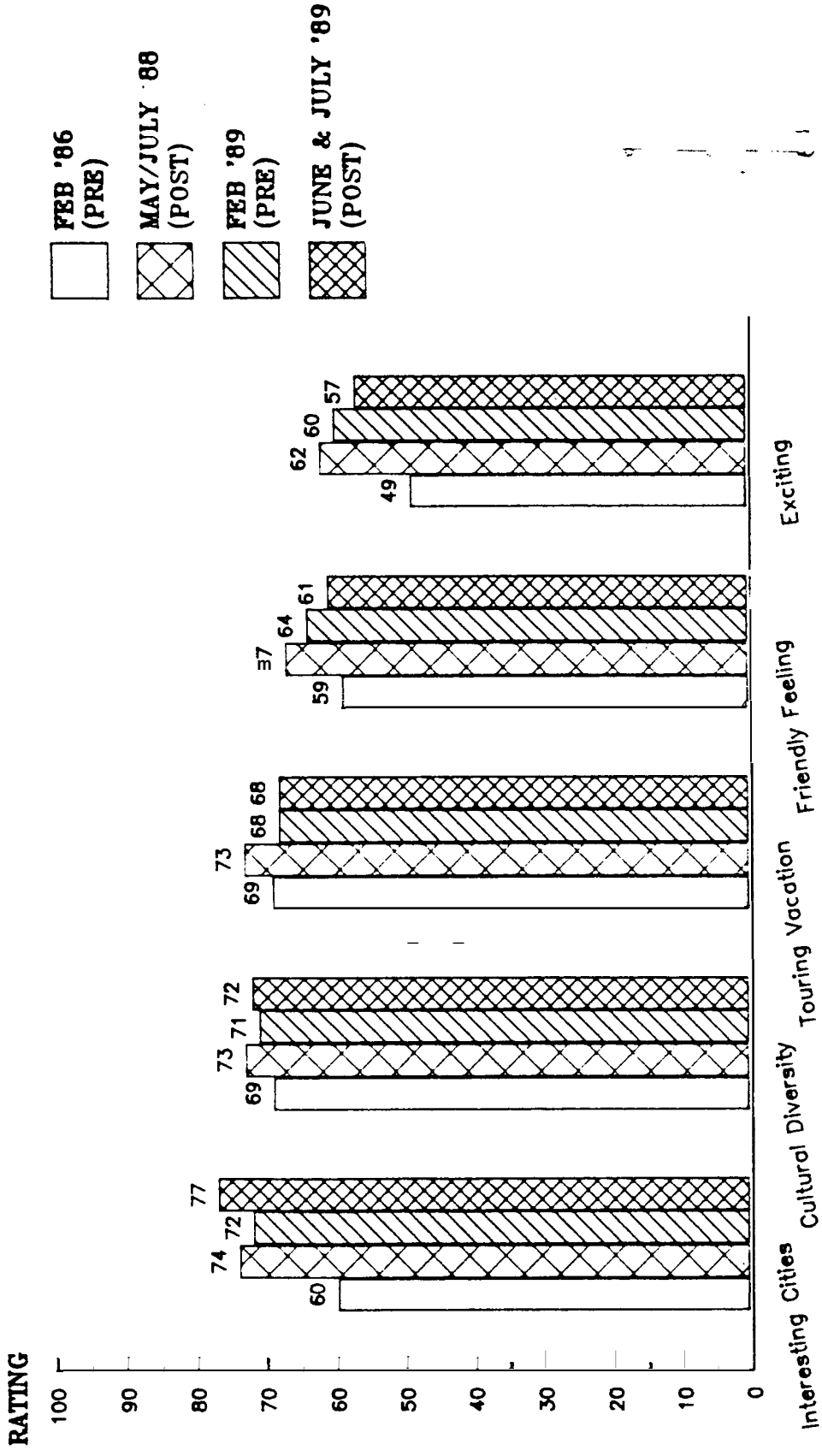


NOTE: * SAYING CANADA WAS MORE POPULAR
HATCHED = PRE: Feb '88; EMPTY = INTRA: Mar-June '89
SOLID = POST: June and July '89

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

TABLE 10

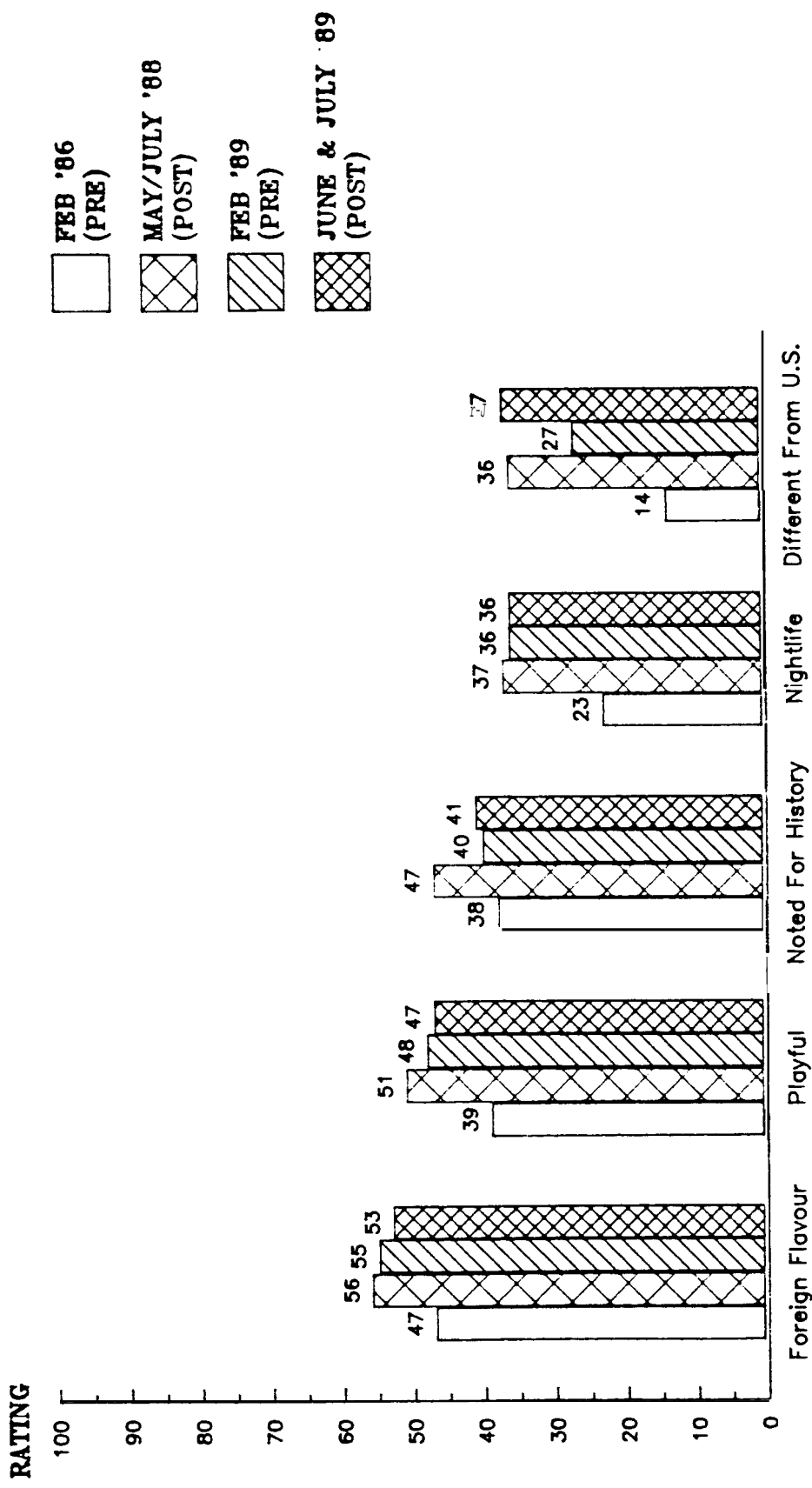
**CANADA'S IMAGE
AS A VACATION DESTINATION 1986-1989
(All Cities/All Respondents)**



SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

NOTE: Scores are calculated from -100 to +100 on a 5 point scale.

TABLE 11
CANADA'S IMAGE
AS A VACATION DESTINATION 1986-1989
(All Cities/All Respondents)

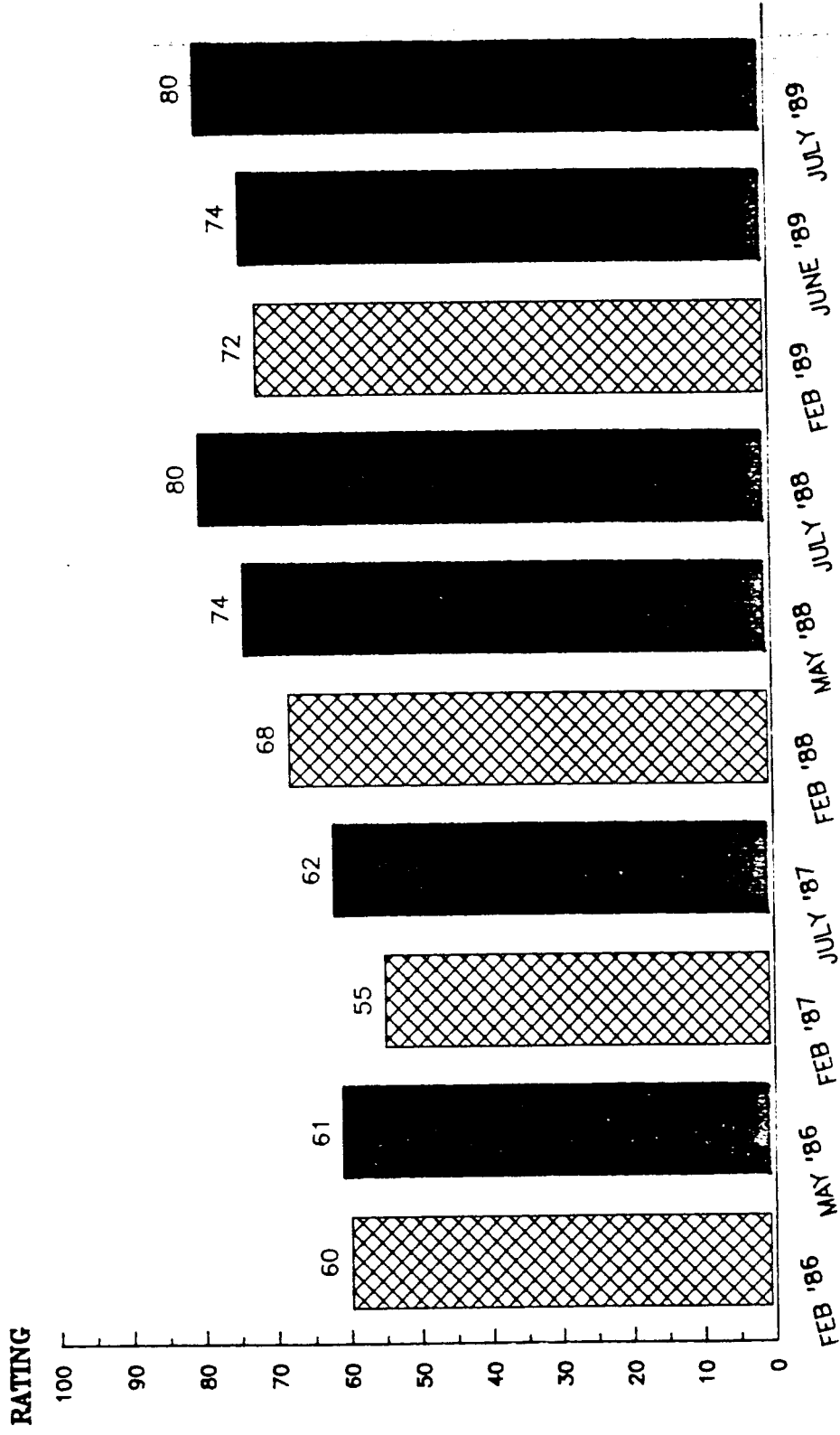


SOURCE: Angus Reid Group
 U.S.A. Ad Campaign
 October, 1989

NOTE: Scores are calculated from -100 to +100
 on a 5 point scale.

TABLE 12

**KEY ASPECTS OF CANADA'S IMAGE
- CITIES INTERESTING -
(All Cities/All Respondents)**



INTERVIEW SCHEDULE

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

NOTE: Scores Calculated Out Of -100 To +100
On 5 Point Agree/Disagree Scale

In 1989, the image attribute "different from U.S." ~~increased only slightly (1% each wave)~~ from 1988 levels. ~~However, the immediate impact of the~~ **advertising** is clearly evident when comparing image strength on a **pre-post** basis. In each year since 1986 each successive pre-wave has measured stronger than the year before with all post-waves showing the same trend (Table #13).

In 1989, changes were noted in all four cities across different dimensions. In New York, Canada's image of being different from the U.S. (19% to 41%), having interesting cities (71% to 80%), having a good variety of restaurants (51% to 72%) and having a good climate for many activities (46% to 56%) showed the most significant improvement. Increases were also seen on the dimensions of regional personalities, cultural diversity and good for a touring **trip**. There were no significant decreases on any image dimensions **wh** ich when compared to the other cities is an important finding.

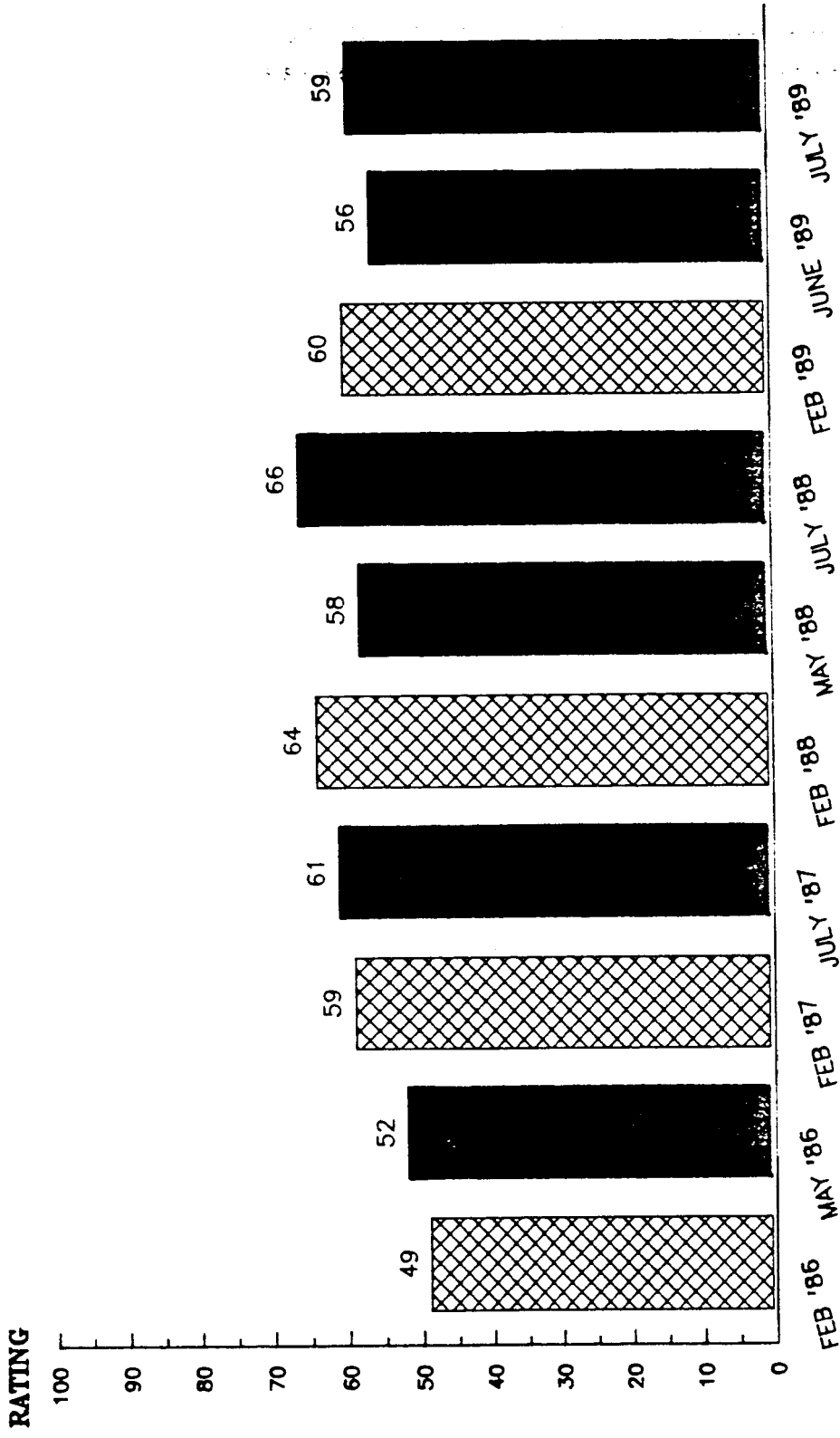
In Boston changes in **image** ratings were not as positive. In 1989 advertising appears to have impacted Bostonians' **image** of Canada **being** playful (45% to 52%) and **having** first class nightlife (39% to 49%). Conversely a significant decrease was measured on the dimensions of Canada being different from the U.S. (41% to 34%) although **this** corrected **itself** in the post print measure, **having** a warm friendly feeling (67% to 57%) and **being exciting** (68% to 62%).

Chicago results were **similar** to New York. Improvements were seen in Canada's image as having interesting cities (59% to 85%), being different from the U.S. (6% to 32%) and having a good variety of restaurants (56% to **70%**). The images of attractions close for visiting and good climate for activities also improved in 1989. Canada was not seen as being exciting (69% to 57%); having a first class nightlife (50% to 36%) nor being playful (56% to 51%).

In San Francisco/Oakland improvements were seen in only five of the eighteen image attributes. The improvements of any significance are noted for history (27% to 36%), popular place to go (48% to 53%), exciting (51% to 56%), and good climate (61% to 67%). Images that lost significantly ground were interesting cities (77% to 71%), playful (47% to 38%), good variety of accommodation (68% to 52%) and good variety of restaurants (66% to 60%).

TABLE 13

**KEY ASPECTS OF CANADA'S IMAGE
- EXCITING -
(All Cities/All Respondents)**



INTERVIEW SCHEDULE

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

NOTE: Scores Calculated Out Of -100 To +100
On 5 Point Agree/Disagree Scale

Of the set of eighteen image attributes, two images saw consistently poor responses across all cities surveyed. First, as time goes on and Americans **are** exposed to more advertising about Canada, fewer Americans perceive Canada to have a **distinct** foreign **flavour**. As well, **in** 1989 on a **pre** to post basis, fewer Americans **thought of Canada** as providing value for their vacation dollars. This data would support the reported decrease in travel into Canada in 1989.

B. Awareness and Recall of Advertising

i) Awareness of Advertising

All respondents in all four cities were asked if they had seen any advertising for Canada ("prompted awareness"). Those who responded affirmatively were subsequently questioned on whether the advertisements were about traveling to or vacationing in Canada. Similar to previous years, in 1989 approximately 95% of respondents aware of recent advertising stated it was about traveling to or vacationing in Canada. This level of response was consistent across all four cities and all for waves of data collection.

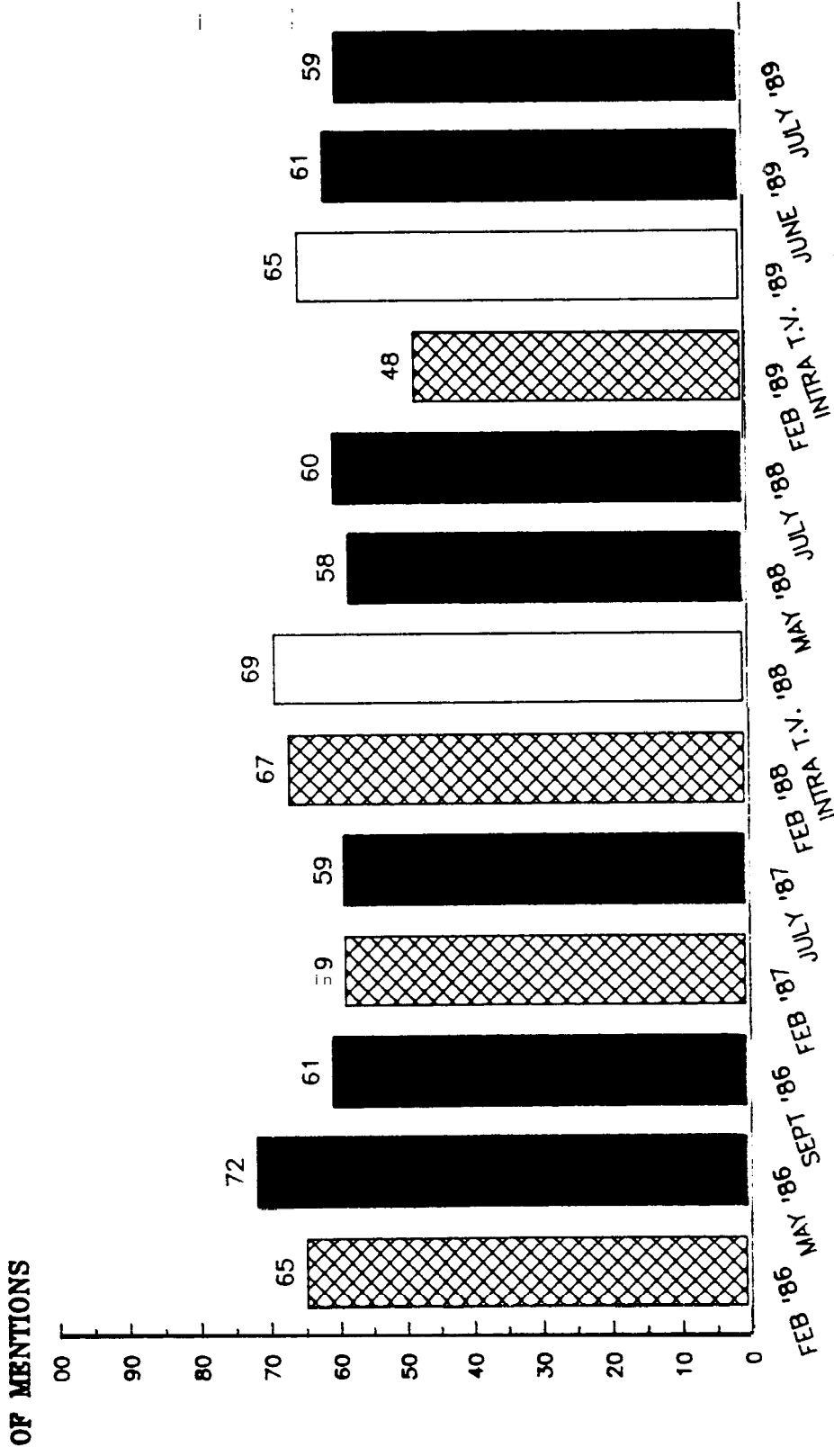
Levels of prompted awareness have never been as high as they were during Expo '86 (May '86) and the Calgary Olympics (Feb. '88) once again confirming the impact of special events on awareness levels. Awareness of advertising for Canada was at its lowest point ever in February of 1989. During his 'pre-wave' measure only 48% of respondents indicated on a prompted basis that they were aware of any advertising for Canada. In post-waves of all four years (1986-89) prompted awareness of advertising has remained constant at the 60% level (Table #14).

After the advertising campaign in 1989 (post TV/post print) respondents in New York had significantly lower levels of prompted advertising awareness than did the other three cities (46% versus 64%). Also, on a pre-post basis in 1989 New York only saw an increase in awareness of 5% whereas in Boston and Chicago saw increase of 16% and 19% respectively. San Francisco had the highest level of prompted awareness in the pre-wave (56%) but did not show as significant an increase at the post phase (6296).

During the 1989 T.V. advertising campaign a total of 100 interviews were completed each week (25 per week in each city) for seven weeks. Results of all four cities were combined to demonstrate the overall trends. The data is presented in "rolling average" form meaning that individual data points represent an average response for the three weeks of data collected up to that date. Table #15 compares 1988 data to 1989 results.

TABLE

**PROMPTED AWARENESS OF ADVERTISING
HAVE SEEN ANY ADVERTISING FOR CANADA
(All Cities/All Respondents)**

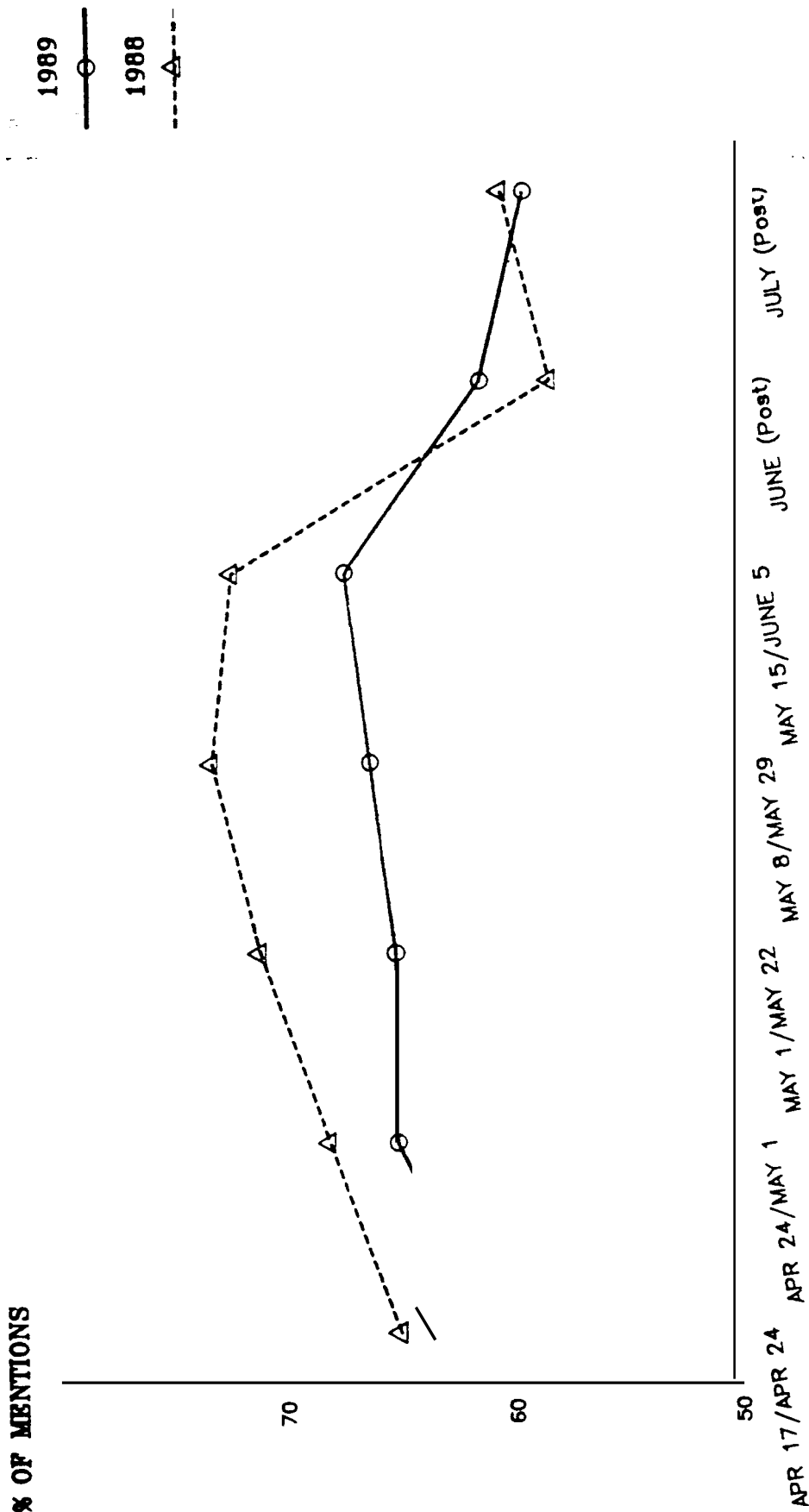


INTERVIEW SCHEDULE

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

TABLE 5

**PROMPTED AWARENESS OF ADVERTISING
DURING THE CAMPAIGN
1988 versus 1989**



3 WEEKS ENDING

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

NOTE: All Cities/All Respondents
HAVE SEEN ANY RECENT ADS FOR CANADA

When all four cities were combined the data indicated that levels of **prompted** advertising **awareness increased** steadily during the respective campaigns. While this trend was similar for both years the **level** of awareness **in 1989** did not reach the **levels** attained in 1988. Awareness **fell** after the campaign in June and July to about 60% from 72% in 1988 and 67% in 1989.

In 1989 **during** the television advertising campaign, all respondents were asked:

“For which destination or place, if any, have been seen or heard any recent advertising related to travel or vacations?”

This description is how we have defined the term 'spontaneous advertising awareness". It identifies on an unaided basis, the impact of Canada's advertising in relation to other tourism advertising campaigns being conducted at the same time.

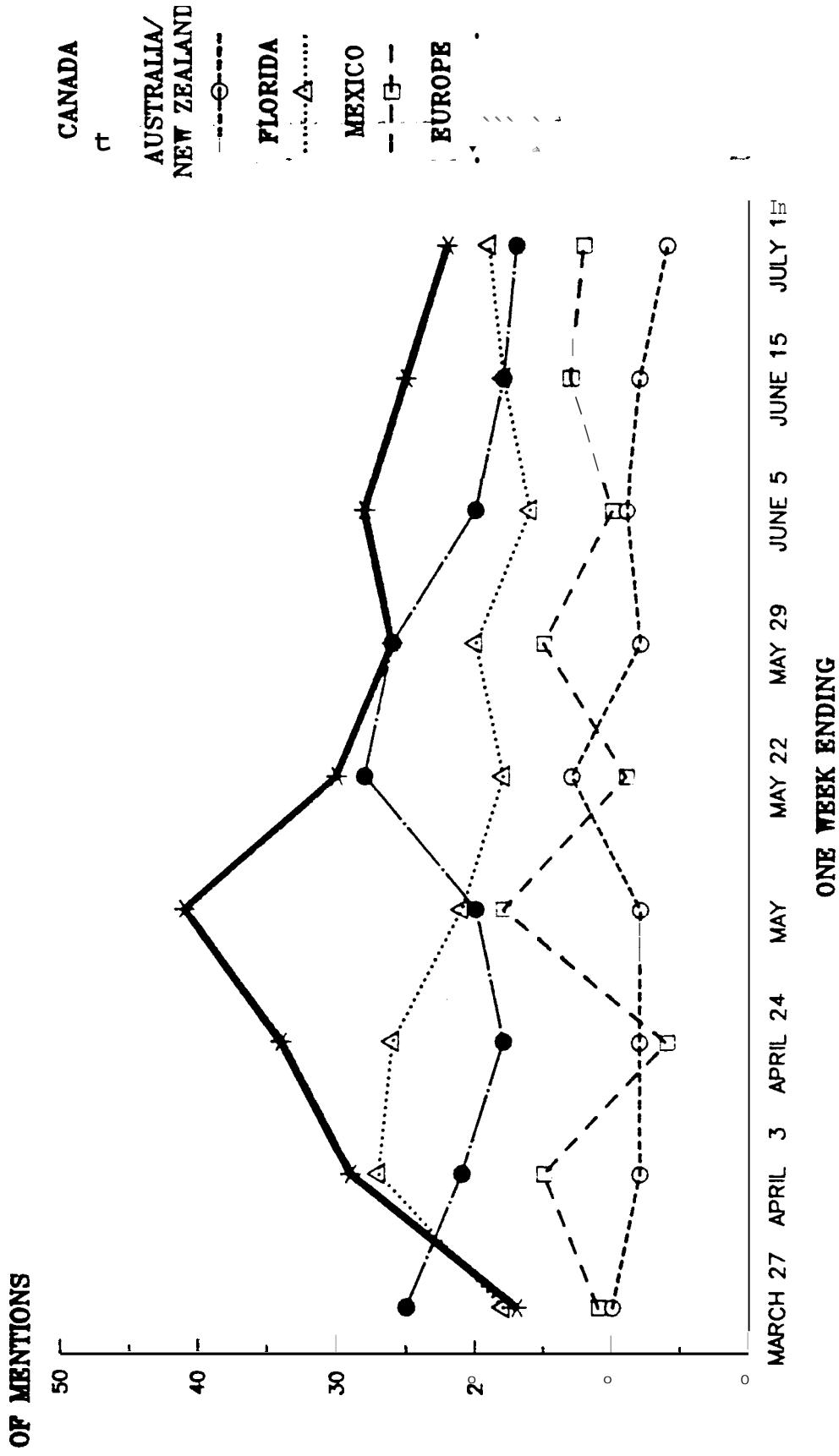
Overall spontaneous awareness for tourism to Canada increased during the campaign from a level of 17% in week 1 to a peak of 41 % about two-thirds of the way into the campaign. With the exception of week 1, the level of spontaneous awareness for Canada was higher during the campaign than the level of awareness for any other single location. It should be noted at this point that Canadian figures include mentions for provincial and city campaigns (Table *16).

Nevertheless, when mentions of specific Canadian provinces or cities are excluded from the spontaneous awareness of advertising measure, general mentions for Canada represent just over two-thirds of all mentions. Other mentions of advertising for specific Canadian locations include Alberta, B. C., Ontario, Quebec, Nova Scotia, Calgary, Vancouver, Toronto and Montreal.

SPONTANEOUS AD AWARENESS DURING 1989 CAMPAIGN

- CANADA VERSUS MAJOR COMPETITORS -

(21 Cities/All Respondents)



Angus Reid Group
 U.S.A. Ad Campaign
 October, 1989

Respondents who indicated they had seen recent advertising for Canada (prompted awareness) **were then asked to recall where the ad had been** sm. In 1989, recall **levels** of T.V. ads **increased** significantly during the TV campaign (64% to 76%) but fell back (72%) after the campaign was over. Conversely, while the TV campaign was running, recall of print media **decreased** from pre-measure **levels** and rebounded at the post-TV phase. At the post-print measure we **see** the **level** of print media awareness decreasing 9% (magazine and newspaper) while recall **levels** of television advertising **increases** 9%. (Table #17)

In both Post measures, respondents in Chicago and Boston were more likely to recall television advertising than respondents in New York or San Francisco. However, at the Post-Print measure awareness of TV advertising registered an **increase** of 12% in all markets **except** Chicago which only showed an increase in awareness of 1%.

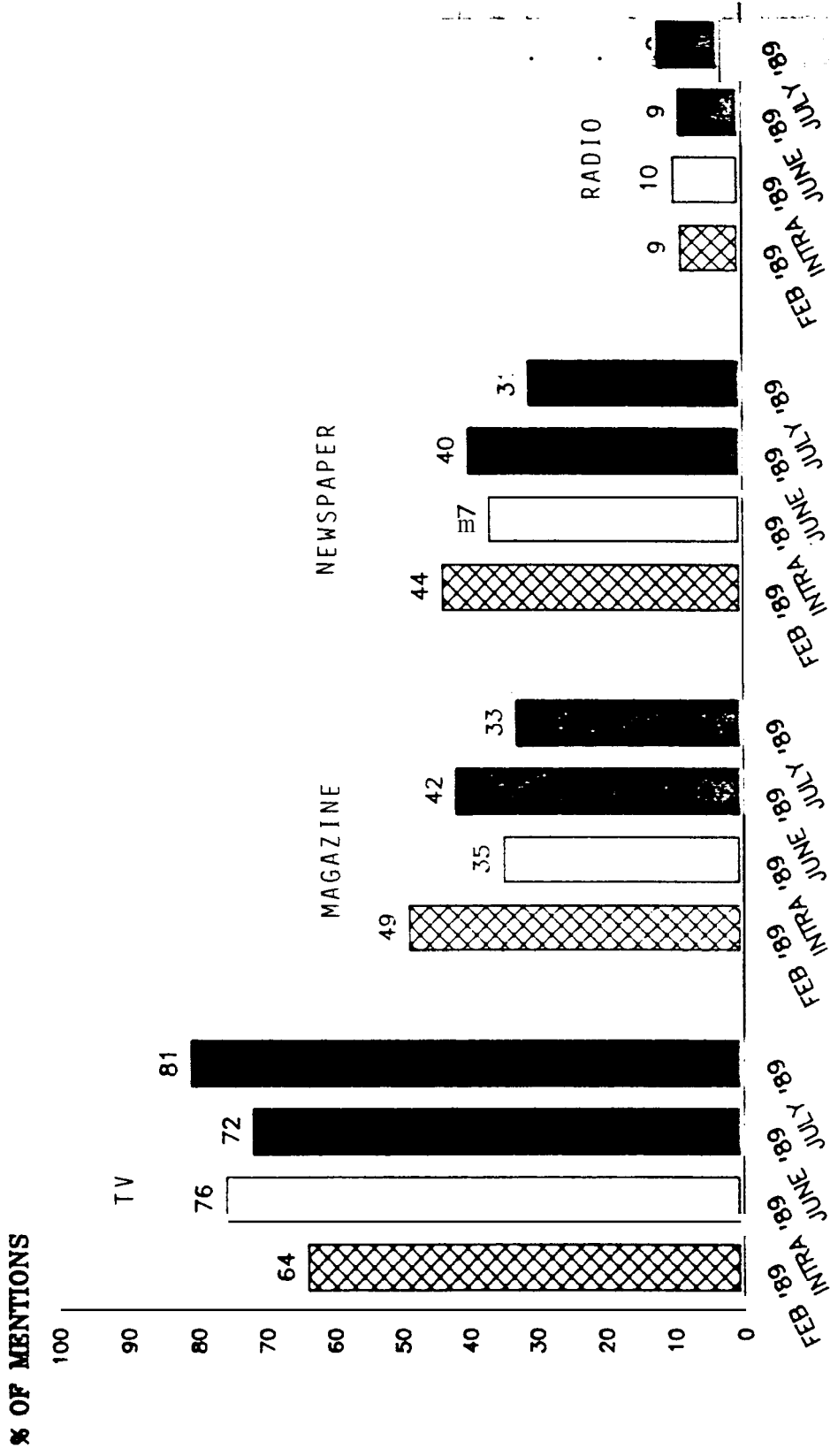
With regard to print media, in both post measures San Francisco was clearly more aware of magazine advertising (58% and 46% respectively) than the other three markets. The trend in newspaper **recall** was not as clear. While Chicago showed the least significant increase in TV ad awareness from the post-TV to post-print phase, it also showed the least significant decrease in awareness of print advertising.

Towards the **end** of the interview, all respondents were read descriptions of TV executions which used the theme slogan; "Canada, the World Next Door". They were asked if they **recalled** seeing each ad. This question was asked after both the TV campaign and the print campaign in 1989. A similar question was asked in 1986, 1987 and 1988. Recall of the TV ads asked in this manner is termed "aided recall".

In 1986, aided recall of specific Tourism Canada ads were at their highest **level** ever. Recall of the "Wild World" ad ranged between 37% and 47% of all respondents in each of the four cities in 1986. Recall of the "New World" ad was slightly **less**, between 32% and 43%, whereas the New World ad (shown **less** frequently that year) ranged between 16% and 25%. In 1986 the data suggests the campaign was effective and particularly memorable to most respondents.

TABLE 17

RECALL OF ADVERTISING FOR CANADA BY MEDIA SOURCE (All Cities/All Respondents)



INTERVIEW SCHEDULE

SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

NOTE: T.V. =BLUE; MAGAZINE=GREEN;
NEWSPAPER=RED; RADIO=VIOLET

In 1987, when 30-second commercials were introduced, the aided recall of specific ads dropped significantly. Recall showed a similar pattern in each city when compared to 1986, with New York being the most difficult to impact. However, in 1987, recall of the "New World" ad decreased less significantly than recall of the "Wild World" ad. The gap between recall levels for each of the three executions was considerably reduced.

In 1988, an interesting phenomenon was identified. Aided recall of each of the two new executions, "Trapeze" and "Rodeo", was significantly less in all four cities in the May (Post-TV) interview wave than in the July (Post-Print) interview wave. This "recall lag effect", even with the smaller samples in each wave per city, is statistically significant and quite pronounced. (Table # 18)

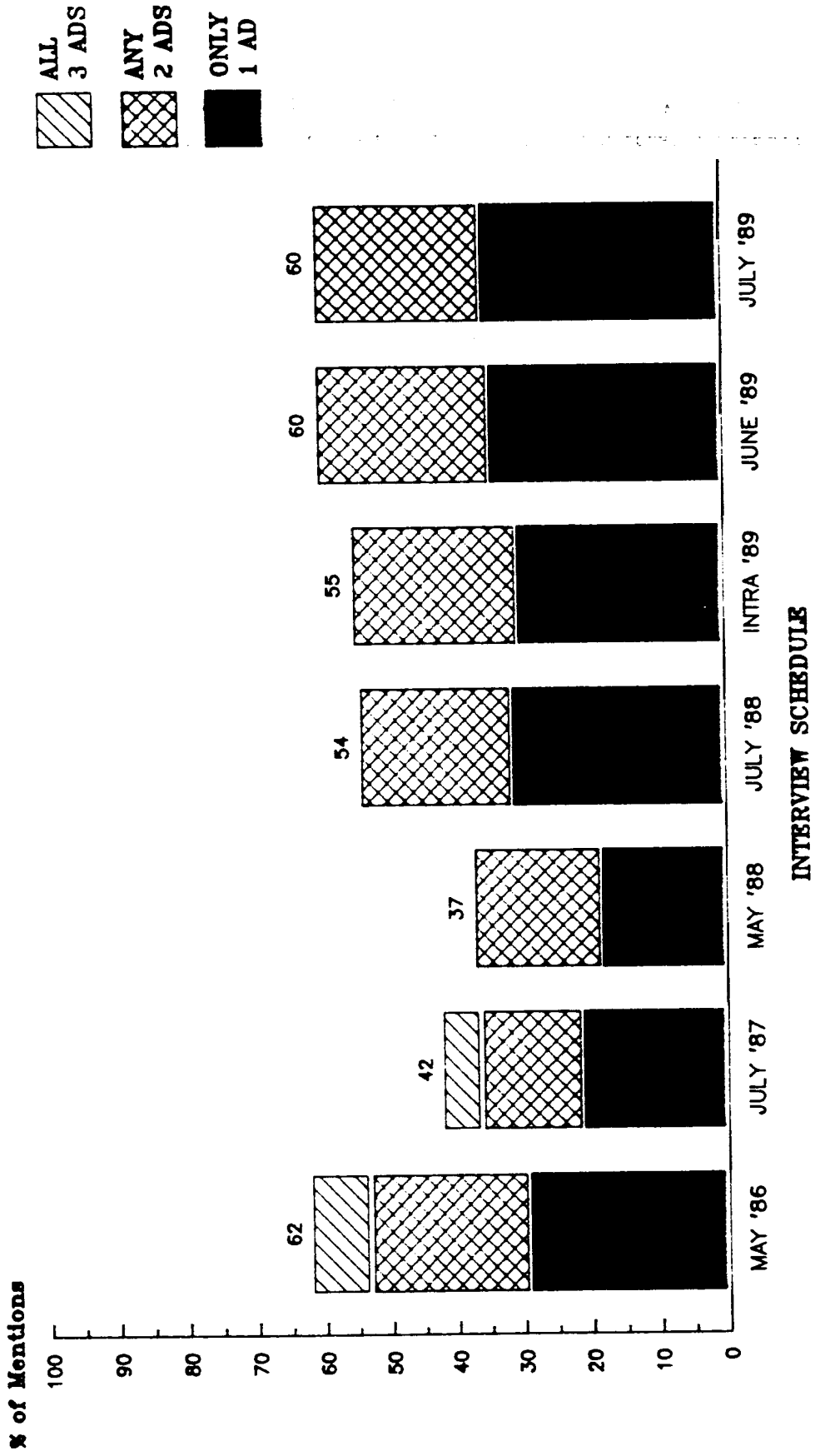
Aided recall of the campaign in July, 1988 was significantly higher than in July 1987, and comparable with recall of any two advertisements from May 1986. In 1988, the "Trapeze" execution was recalled approximately 20-30% more frequently overall than the "Rodeo" execution. However, the growth in recall between May and July 1988 was relatively consistent for each of the two executions. Within cities the greatest increase in recall in 1988 came from New York.

Aided recall for "seen any two ads" reached its highest level ever in June/July 1989. Similar to the 1988 results, the "Trapeze" execution was recalled 21 % more often than "Rodeo" during the post-print wave and 35% more frequently after the television campaign. Overall change in recall levels between June and July 1989 was relatively small for each of the two executions. Within cities the greatest increase in recall in 1989 came from San Francisco.

All respondents who were acknowledged as having seen advertising for Canada were asked if they remembered the slogan or theme phrase used to identify Canada in the ads. Those who stated "Canada, the World Next Door", were categorized as having "spontaneous recall". Respondents not correctly recalling the slogan had it read to them and were then asked if they recalled advertising using this slogan. This "aided recall", together with "spontaneous recall" is termed "total recall".

TABLE 18

**AIDED RECALL OF ANY
TOURISM CANADA T.V. ADS
(All Cities/All Respondents)**



SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

Overall spontaneous and ~~aided recall~~ of the slogan increased significantly in 1989. The most notable ~~increase was~~ found in spontaneous recall where the post-print level has **doubled since** July (Post Print) 1988. Similar to 1988 spontaneous recall levels in the post-print interview wave in 1989 were **lower** than the post TV wave that year. (Table #19)

ii) Thoughts and Feelings on the Advertising

Respondents recalling advertising in each media were asked their thoughts and feelings on the ads they saw and what they remembered about the ads. A similar question was also asked in previous years. The small samples within each city, however, make comparability on a year-to-year basis difficult. What people recalled about newspaper and magazine advertising **was** based on comparatively very small base sizes, thus wider margins of error make analysis difficult. Nevertheless, despite the small sample sizes, it has been possible to make some hypotheses about the campaign as a whole from the question on thoughts and feelings.

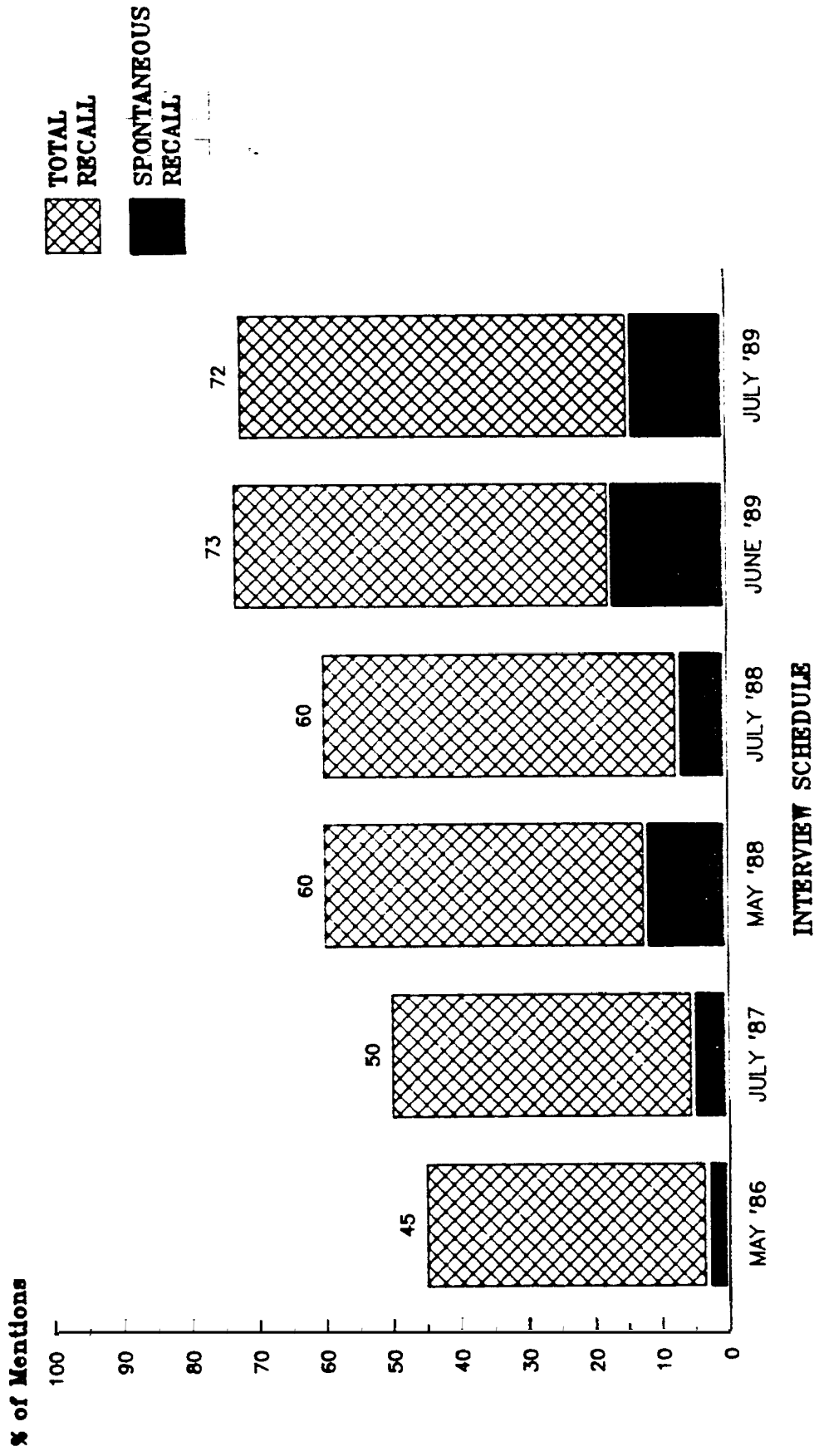
Thoughts and feelings about the advertisements (by media) were classified as either positive, negative or neutral. When respondents stating they recalled the advertisement could not describe their thoughts or feelings they were classified as "don't know". A four-year analysis of these thoughts and feelings on the advertisements by media holds enough statistical weight to warrant discussion and offer directional insights.

The level of positive thoughts derived from television ads were analyzed comparing total positive thoughts about the advertising to positive thoughts about Canada specifically. Between May 1986 and May 1988 both **levels** of thought follow a similar pattern, increasing significantly from May to September in 1986 then gradually decreasing over the next two years. (Table #20)

In 1989 we see a significant increase in total positive thoughts about the TV ads but an equally significant decrease in positive thoughts about Canada.

TABLE 9

SLOGAN RECALL
"CANADA, THE WORLD NEXT DOOR"
All Cities/All Recalling Advertising

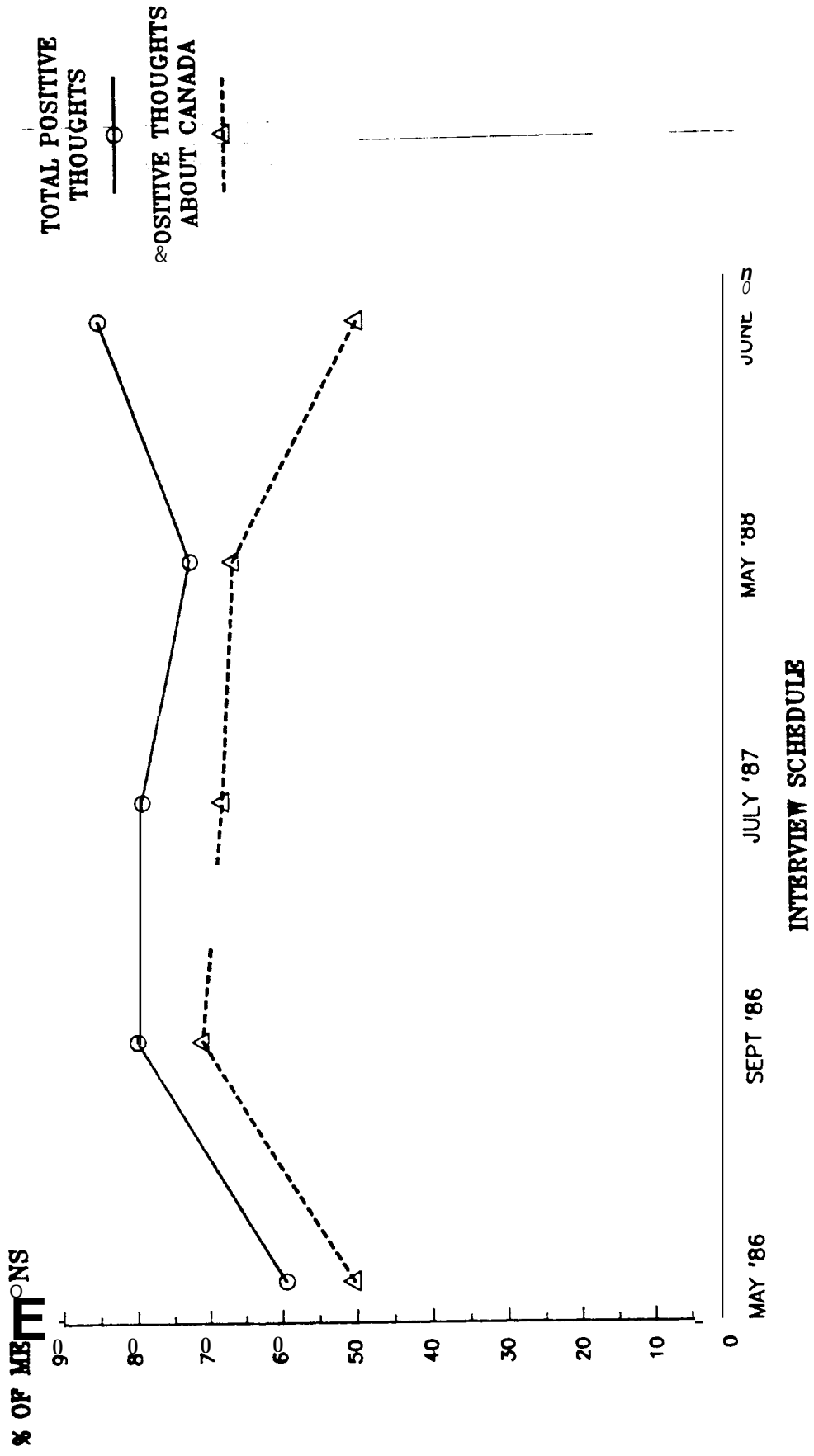


SOURCE: Angus Reid Group
 U.S.A. Ad Campaign
 October, 1989

TABLE 20

LEVEL OF POSITIVE THOUGHTS FROM TELEVISION ADS

(All Cities/All Recalling T.V. Advertising)



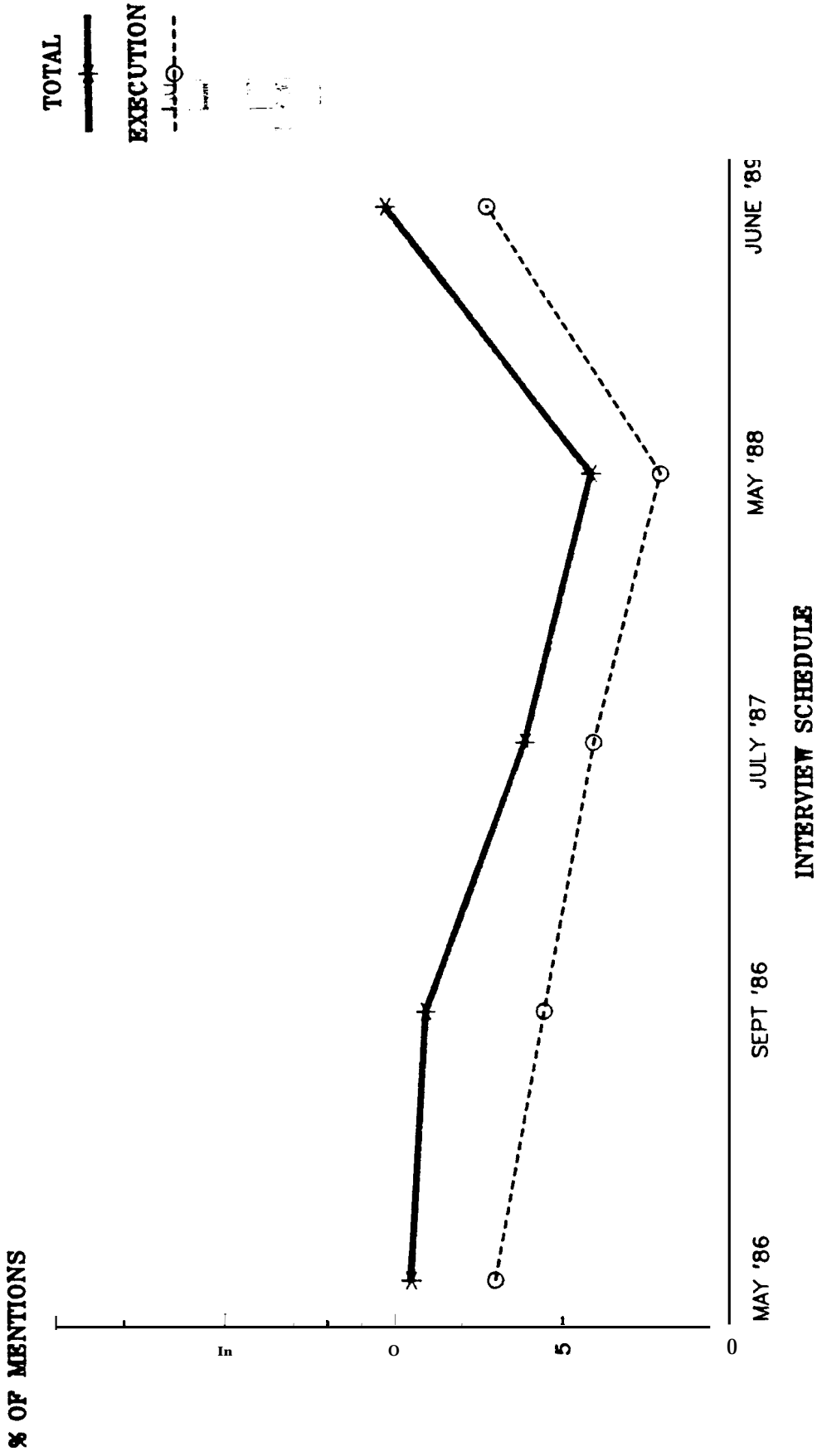
SOURCE: Angus Reid Group
 U.S.A. Ad Campaign
 October, 1989

Respondents are **increasingly** recalling more about **executional** issues such as “bright **colours**” and “nice **music**” *than* they are about recalling Canada as a “warm, friendly place to visit” or Canada as having a “clean, refreshing environment”. These results suggest that while the advertising is received positively by 83% of those respondents who saw it, approximately 40% of the positive thoughts were related to the execution of the ad and not Canada itself.

Negative thoughts about TV ads also increased significantly growing from 5% in May 1988 to 11% in 1989. More than half of the negative thoughts in 1989 were a result of **executional** issues. (Table #21) When other media sources are analyzed *on* this dimension it was found that negative thoughts on magazine ads increased slightly in 1989 compared to 1988, whereas negative thoughts about the newspaper ads decreased slightly (neither of these changes were significant). (Table #22)

ABEL 2

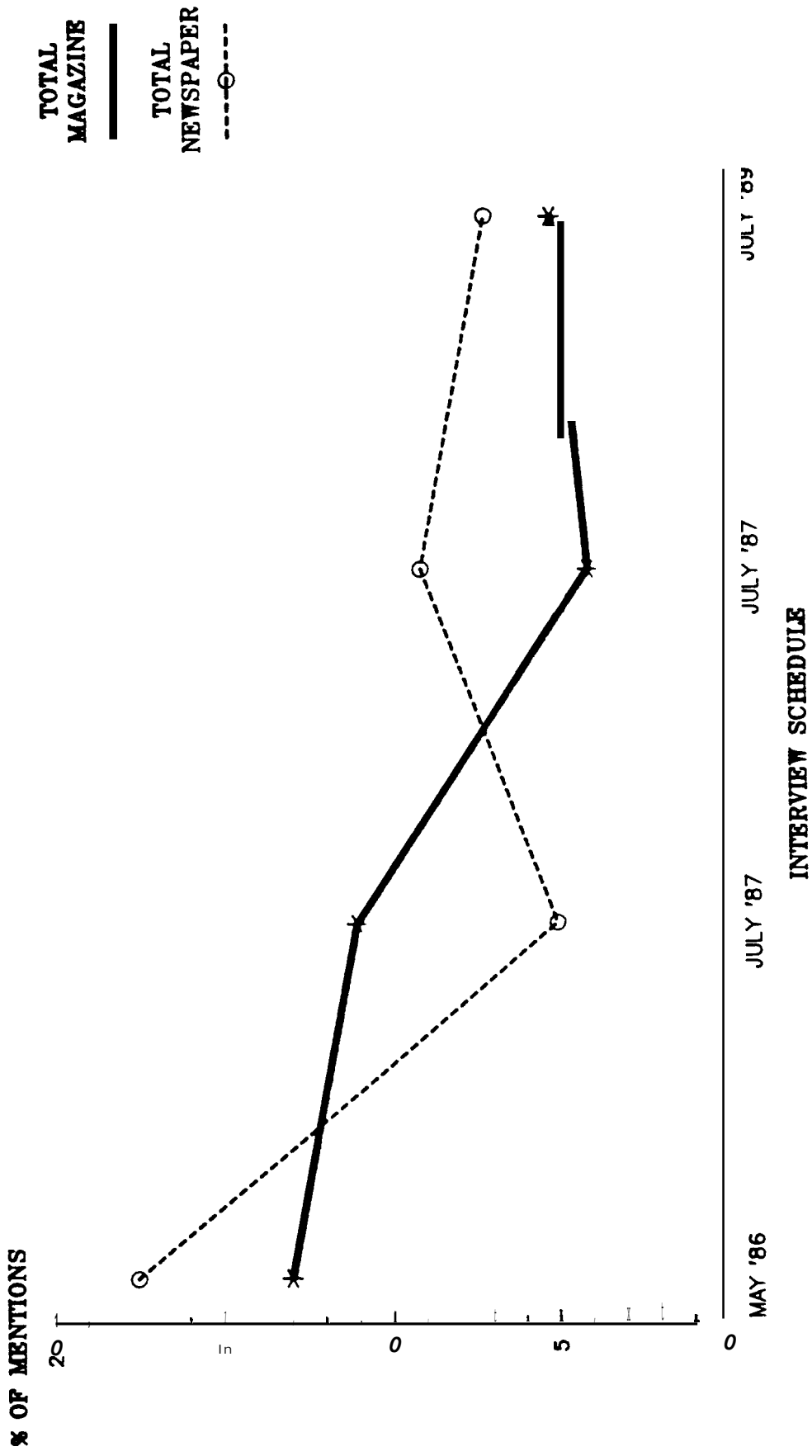
NEGATIVE THOUGHTS T.V. (All Cities/All Respondents)



SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

TABLE 22

**NEGATIVE THOUGHTS
MAGAZINE & NEWSPAPER
(All Cities/All Respondents)**



SOURCE: Angus Reid Group
U.S.A. Ad Campaign
October, 1989

APPENDIX

TECHNICAL APPENDIX

1. The Sample

- * A total of 5,500 telephone interviews were completed in the U.S.A. in four waves as follows:

Interviewers

1. February 1989 (PRE)	1,600
2. March-June 1989 (INTRA)	700
3. June 1989 (POST TV)	1,600
4. July 1989 (POST PRINT)	1,600

- * interviews conducted in four cities:
 - Boston
 - * New York
 - Chicago
 - San Francisco/Oakland area
- Respondents were screened as follows:
 - a) U.S. adults 25 years or older
 - b) Who have taken a pleasure trip in past 12 months in which they travel led at least 100 miles one way.
 - c) At least one night spent in commercial accommodations, or where commercial transportation was taken.
 - d) With household income of \$25,000 or more.
 - e) Selected within households using "birthday method"
- * Quote as were set by city and by sex. Half of the sample in each city was male and half the sample was female.
- The interviewing was conducted to allow independent analysis of each phase of the project.

2. Sampling Points

The interviewing was completed in the following towns and cities:

- NEW YORK CITY:
- Metropolitan New York City
 - Westchester County
 - Putnam County
 - Bergen County
 - Nassau County

- BOSTON:
- Metropolitan Boston
 - West Suburbia
 - South Suburbia
 - North Suburbia

- CHICAGO:
- | | |
|------------------------|-----------------|
| • Metropolitan Chicago | • Dearfield |
| • Napierville | • Des Plains |
| • Lincoln shire | * Fort Sheridan |
| • Morton Grove | • Glen View |
| • Northbrook | * Golf |
| • Parkridge | • Highland Park |
| • Riverwood | * Highwood |
| • Rosemount | • Kenilworth |
| • Winettka | • Lake Bluff |
| • Bannockburn | • Lake Forest |

- SAN FRANCISCO:
- City of San Francisco
 - City of Oakland

3. Sampling Method

The originally pulled sample (**pre-Spring** 1986) of telephone numbers was used as the primary source of numbers. The original sampling was conducted in the following **manner**:

- a) Telephone **directories were selected in metropolitan areas, omitting** directories consisting of ghetto areas.
- b) The fifth telephone number from the bottom of the left hand page of every second page was recorded.
- c) A list was compiled of eight times the required number of telephone numbers.
- d) For each of the telephone numbers, the second digit from the **end** was increased by one.
- e) The same modified random digit telephone list was used in subsequent waves with the third digit from the **end** being increased by one.

4. The Questionnaire

- * Respondents screened for pleasure **trip**, accommodation, income, member of household.
- * Awareness (spontaneous) of three locations for three trip types:
 - touring trips
 - city trips
 - outdoor trips
- Travel history last 2 years (by trip type).
- Travel likelihood next 2 years (by trip **type**).
- Likelihood of location of trips (by trip type).
- A 5-point agreement rating of 18 statements on Canada as a tourist destination.

- Comparative popularity of Canada as a vacation destination (by trip **type**). --
- History **of travel** to Canada.
- Awareness of advertising about tourism of Canada.
- * Spontaneous ad media recall.
- Demographics.

QUESTIONNAIRE (INTRA AND POST)

Questionnaire (Intra and Post)

- TV ad content recall (Post TV).
- * **Newspaper/magazine ad content recall (Post Print).**
- Recall of thoughts and feelings.
- * Aided TV **recall.**
- Slogan recall and sponsor recognition.
- * Information sources and usefulness.

5. **Fieldwork**

- Dates of fieldwork for each wave were as follows:
 1. **(PRE)** - 1,600 in the two weeks prior to start of advertising (February 13-28)
 2. **(INTRA)** - 100 per week x 7 weeks during TV advertising (March 20-27, March 28-April 3, April 17-24, April 25-May 1, May 15-22, May 23-29, May 30-June 5)
 3. **(POST TV)** - 1,600 in two weeks following completion of TV advertising (June 6-20)
 4. **(POST PRINT)** - 1,600 to be completed in two weeks following completion of print advertising (July 5- 19)

- * See Media and Research Schedule Chart for overlapping schedule of media placement and research fieldwork.

- * Interviewing was conducted in central office locations in New York and San Francisco. Angus Reid Group executives were present at initial briefing sessions.

6. Call Record Disposition

The disposition of calls has been summarized across all four waves of interviewing for the **total** U.S. market (including **New** York, Boston, Chicago, San Francisco/Oakland).

	<u>Number</u>	<u>Percent of Total Calls</u>	<u>Percent of Available Respondents</u>
Total Dialings	116,141	100.0	.
Busy/no answer	45,592	39.2	.
Business numbers	4,433	3.8	.
Disconnected	14,978	12.8	.
Language/hearing	2,117	1.8	.
Respondent not available	10,659	9.1	.
Refusal	23,674	20.3	.
AVAILABLE TO BE INTERVIEWED	<hr/> [14,688]	<hr/>	<hr/> [of 14,688]
Termination at:			
Q.1a Pleasure Trip/Age	7,029	6.0	47.9
Q.1b Accom./Transp.	1,164	1.0	8.0
Q.2 Income	982	1.0	6.6
Completes	5,513	5.0	37.5
INCIDENCE			37.5

7. Data Analysis

Data analysis for the survey was carried out by the Angus Reid Group computing **centre** in Toronto. **All** graphs were designed and produced in-house.

QUESTIONNAIRE

PROOFED _____ PRECORRECTED ES CHECKED _____

START _____ TIME STOP _____ TIME TOTAL TIME MINS. _____

Time

THE ANGUS REID GROUP
102 Bloor Street West
Suite 200
Toronto, Ontario
M5S 1M8

June 1, 1969

New York1
Boston2
Chicago3
San Francisco ...4
Oakland5

ROTATION 1
2
3

TOURISM CANADA
PRE AND POST TEST OF ADVERTISING
1989
- QUESTIONNAIRE -
WAVE III
POST TV
(7-355-13)

INTRODUCTION

Hello, I'm _____ from _____, a professional market research company. We are conducting a major survey on vacation travel and your household has been selected to be part of the research. The "interview" will only last a few minutes and you can be assured the results will be reported as statistics only.

1a) I'd like to talk to you about pleasure trips. By pleasure trip, I mean a trip that was not made solely for business or personal reasons, such as weddings, or doctors appointments and the like.

To begin, have you, or anyone else in your household over the age of 25, taken a pleasure trip with in the past twelve (12) months in which they travelled at least 100 miles one way.

YES 1 -> CONTINUE
NO 2 -> TERMINATE

1b) Was at least one night spent in commercial accommodation or, was commercial transportation taken?

YES 1 -> CONTINUE
NO 2 -> TERMINATE

2. Is your household income above \$25, 000/year or below \$25, 000/year?

ABOVE \$25,000/YEAR 1-> CONTINUE
BELOW \$25, 000/YEAR 2 -> TERMINATE

3. To obtain a random sample for this survey, could we please talk to the person who took a pleasure trip of that type, and last had a birthday?

RESPONDENT 1 -> CONTINUE
OTHER 2 -> SKIP NOTE

SKIP NOTE:

- ASK TO SPEAK TO THAT PERSON.
- REINTRODUCE SURVEY FROM PAGE ONE (IF NECESSARY).
- CONTINUE

RECORD SEX: Male. 1 -> WATCH QUOTA
F&male. 2 -

Ref . #RIE/TOU 170-02950

STATE TO ALL RESPONDENTS

In the following questions, I will be referring to "pleasure trips". By pleasure trip I mean a trip that is not made solely for business or personal reasons and where at least one night is spent in commercial accommodation or, where commercial transportation is taken.

Now thinking about pleasure trips, I'd like to ask you a few questions about different types of pleasure trips that you might consider taking yourself. Simply ask if you want me to explain what is meant by the type of trip I am going to be asking about.

4a) Please tell me the first place that comes to mind for a trip whose primary purpose is...

a touring trip. [That is a trip through areas of scenic beauty, culture, or general interest.]
(PROBE FOR COUNTRY IF NECESSARY)
(DO NOT PROBE CANADIAN LOCATIONS)

4b) What is the next place that comes to mind?

4c) What is the third place that comes to mind?

	(Qa) First Mention	(Qb) Second Mention	(Qc) Third Mention
UNITED STATES	1	1	1
MEXICO	2	2	2
EUROPE	3	3	3
CANADA (GENERAL)	4	4	4
Calgary	5	5	5
Halifax	6	6	6
Montreal	7	7	7
~	8	8	8
Ottawa	9	9	9
Quebec city	10	10	10
Winnipeg	11	11	11
Vancouver	12	12	12
Canada other.	13	13	13
ALL OTHER AREAS	14	14	14
DON'T KNOW	99	99	99

5a) Please tell me the first place that comes to mind for a trip whose primary purpose is...

a city trip. (That is a trip to a city where you may shop, visit museums, dine, attend plays or concerts, or just stroll around and enjoy the city.) FOR INTERVIEWER CLARIFICATION. (PROBE FOR COUNTRY IF NECESSARY) (DO NOT PROBE CANADIAN LOCATIONS)

5b) What is the next place that comes to mind?

5c) What is the third place that comes to mind?

	(Qa) First Mention	(Qb) Second Mention	(Qc) Third Mention
UNITED STATES	1	1	1
MEXICO	2	2	2
EUROPE	3	3	3
CANADA (GENERAL)	4	4	4
Atlantic Provinces*	5	5	5
.	6	6	6
Ontario	7	7	7
Manitoba	8	8	8
Saskatchewan	9	9	9
Alberta**	10	10	10
British Columbia	11	11	11
Yukon/Arctic***	12	12	12
ALL OTHER AREAS	13	13	13
DON'T KNOW	99	99	99

• Atlantic Provinces include: Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland

• * Includes Canadian Rockies

*** Includes Northwest Territories

6a) Please tell me the first place that comes to mind for a trip whose primary purpose is...

an outdoors trip. [That is a trip in a natural area where you may engage in activities such as camping, hunting, fishing, hiking or rafting.] FOR INTERVIEWER CLARIFICATION. (PROBE FOR COUNTRY IF NECESSARY) (DO NOT PROBE CANADIAN LOCATIONS)

4b) What is the next place that comes to mind?

4c) what is the third place that comes to mind?

	(Qa) First Mention	(Qb) Second Mention	(Qc) Third Mention
UNITED STATES	1	1	1
MEXICO	2	2	2
EUROPE	3	3	3
CANADA (GENERAL)	4	4	4
Atlantic Provinces*	5	5	5
.	6	6	6
Ontario	7	7	7
Manitoba	8	8	8
Saskatchewan	9	9	9
Alberta •*	10	10	10
British Columbia	11	11	11
Yukon/Arctic***	12	12	12
ALL OTHER AREAS	13	13	13
DON'T KNOW	99	99	99

- Atlantic Provinces include: Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland
- * Includes Canadian Rockies
- ** Includes Northwest Territories

7a) How many touring trips have you taken in the last two (2) years?
 (READ LIST)

- None..... 1
- 1-2 trips ...2
- 3 or more....3
- DK/NS..... 9

7b) What do you think is the likelihood of you making a touring trip for pleasure in the next two (2) years?
 Would you say you

- Definitely will1
- Probably will.2 | —> ASK Q. 7c

- Probably will not. ...3
- Definitely will not. .4 | —————> GO TO Q.8a

DON'T KNOW.9
 (DO NOT READ)

7c) How likely would you be to make this touring trip in the following places?

READ COUNTRY NAME THEN LIKELIHOOD SCALE

<u>ROTATE</u>	<u>DEFINITELY</u> <u>WILL</u>	<u>PROBABLY</u> <u>WILL</u>	<u>PROBABLY</u> <u>WILL NOT</u>	<u>DEFINITELY</u> <u>WILL NOT</u>	<u>DON'T</u> <u>KNOW</u>
— The United states. & 1		2	3	4	9
— Mexico 1		2	3	4	9
— Canada 1		2	3	4	9
— Europe 1		2	3	4	9
— All Other Areas. . 1		2	3	4	9

8a) How many city trips have you taken in the last year (2) years?
 (READ LIST)

- None1
- 1-2 trips ...2
- 3 or more. ...3
- DK/NS.....9

8b) What do you think is the likelihood of you making a city trip for pleasure in the next two (2) years? Would you say you

- Definitely will 1
- Probably will 2 --> ASK Q. 8c
- Probably will not ... 3
- Definitely will not 4 ----- GO TO Q. 9a
- DON'T KNOW9

8c) How likely would you be to make this city trip in the following places?

READ COUNTRY NAME THEN LIKELIHOOD SCALE

	<u>DEFINITELY</u> <u>WILL</u>	<u>PROBABLY</u> <u>WILL</u>	<u>PROBABLY</u> <u>WILL NOT</u>	<u>DEFINITELY</u> <u>WILL NOT</u>	<u>DON'T</u> <u>KNOW</u>
<u>ROTATE</u>					
— The United States..A	1	2	3	4	9
— MexicoB	1	2	3	4	9
— CanadaC	1	2	3	4	9
— EuropeD	1	2	3	4	9
— All Other Areas. .E	1	2	3	4	9

9 a) Now, thinking of pleasure trips, how many outdoors trips have you taken in the last two (2) years? - (READ LIST)

- None 1
- 1-2 trips ... 2
- 3 or more.... 3
- DK/NS..... 9

9b) What do you think is the likelihood of you making an outdoors trip for pleasure in the next two (2) years?
Would you say you

- Definitely will 1
- Probably will 2 | -> ASK Q. 9c
- Probably will not 3
- Definitely will not 4 | -> GO TO Q. 10a
- DON'T KNOW 9
- (DO NOT READ)

9c) How likely would you be to make this outdoor trip in the following places?

READ COUNTRY NAME THEN LIKELIHOOD SCALE

<u>ROTATE</u>	<u>DEFINITELY WILL</u>	<u>PROBABLY WILL</u>	<u>PROBABLY WILL NOT</u>	<u>DEFINITELY WILL NOT</u>	<u>DON'T KNOW</u>
— The United States. A1		2	3	4	9
— Mexico 0 1		2	3	4	9
— Canada C 1		2	3	4	9
— Europe E 1		2	3	4	9
— All Other Areas. . E 1		2	3	4	9

10a) In the past month, do you remember hearing or seeing any news, sports or special event stories you associate with a potential travel destination?

- YES 1 -> ASK Q.10b
- NO 2 -> GO TO Q. 11
- DON'T KNOW 9

YES TO Q.10a. ASK:

10b) What is the first news, sports or special event story you can recall? [RECORD FIRST MENTION ONLY]

10c) What travel destination do you associate with that story? [RECORD FIRST MENTION ONLY]

- 11a) For which destination or place, if any, have you seen or heard any recent advertising related to travel or vacations? [RECORD FIRST MENTION UNDER FIRST COLUMN AND ALL OTHERS UNDER SECOND COLUMN]
- 11b) Which other advertising for travel or vacation destinations do you recall? [RECORD ALL OTHER MENTIONS UNDER SECOND COLUMN]

	11a) First Mention	11b) Other Mention
CANADA (General)	01	A 1
• Alberta	02	B 1
• Atlantic Provinces	03	1
British Columbia	CM	? 1
Calgary	05	C 1
Manitoba	06	F 1
Montreal	07	G 1
Ontario	08	H 1
New Brunswick	09	I 1
Newfoundland	10	J 1
Nova Scotia	11	K 1
(P.E.I.) Prince Edward Island	32	L 1
Quebec	13	M 1
Saskatchewan	14	N 1
Toronto	15	O 1
Vancouver	16	P 1
•• Yukon/Northwest Territories	17	1
ALL OTHER AREAS [SPECIFY]	5	1
U.S.A. (General)	31	Q 1
Alaska	32	R 1
Arizona	33	S 1
California	34	T 1
Colorado	35	U 1
Florida	36	V 1
Georgia	37	W 1
Hawaii	38	X 1
m *	39	Y 1
Michigan	40	Z 1
••• New England	41	AA 1
New York (State)	42	AB 1
New York (City)	43	AC 1
Nevada	44	AD 1
•••• Northwest	45	AE 1
Pennsylvania	46	AF 1
Tennessee	47	AG 1
Virginia	48	AH 1
Wisconsin	49	AI 1
ALL OTHER AREAS [SPECIFY]	64	1
MEXICO	61	AM 1
CARIBBEAN (including Bahamas, Bermuda, Jamaica)	62	AN 1
EUROPE	63	AO 1
AUSTRALIA/NEW ZEALAND	64	AP 1
SOUTH AMERICA	65	AQ 1
ALL OTHER AREAS	97	AR 1
NONE/NO OTHERS	98	AS 1
DON'T KNOW/NOT STATED	99	AT 1

● Al am3 - INCLUDES ALL MENTIONS OF CANADIAN ROCKIES, BANFF, LAKE LOUISE.

••• YUKON/NORTHWEST TERRITORIES - INCLUDES: ARCTIC, NORTHERN CANADA.

● ••• P' ENGLAND - INCLUDES: MASSACHUSETTS, NEW HAMPSHIRE, VERMONT, RHODE ISLAND, MAINE, CONNECTICUT.

•••• NORTHWEST U.S.A. - INCLUDES: OREGON, WASHINGTON STATE, UTAH, SEATTLE, IDAHO, MONTANA.

Tourism Canada
1989 USA Ad Tracking Study

32. Next, I would like to read you a short list of statements that could be made about Canada as a place to travel to for a pleasure vacation. Please tell me how strongly you agree or disagree with each statement. Would you say that you... (READ LIST) [REPEAT SCALE IF NECESSARY]

- STRONGLY AGREE
- MODERATELY AGREE
- NEITHER AGREE NOR DISAGREE
- MODERATELY DISAGREE
- STRONGLY DISAGREE

that READ STATEMENTS ONE AT A TIME FROM TICK START.

ROTATE	READ COUNTRY NAME THEN LIKELIHOOD SCALE					DK/ NS
	STRONGLY AGREE	MODERATE AGREE	NEITHER AGREE NOR DISAGREE	MODERATE DISAGREE	STRONGLY DISAGREE	
A Canada has cultural diversity	1	2	3	4	5	9
B Canada is exciting	1	2	3	4	5	9
C Canada is good for a touring type of trip	1	2	3	4 "	5	9
D Canada has a friendly, welcoming feeling	1	2	3	4	5	9
E Canadian towns and cities are uninteresting	1	2	3	4	5	9
F Canada's climate is suitable for a wide range of summer activities	1	2	3	4	5	9
G Canada is noted for its history	1	2	3	4	5	9
H Canada has a foreign flavour	1	2	3	4	5	9
I Canada has first class night life	1	2	3	4	5	9
J Canada is playful	1	2	3	4	5	9
K Canada's main attractions are too far away to visit	1	2	3	4	5	9
L Canada has a good variety of accommodation	1	2	3	4	5	9
M Canada is not distinctly different from the United States	1	2	3	4	5	9
N Canada provides good value for your vacation dollar	1	2	3	4	5	9
O Canada does not have a good variety of restaurants	1	2	3	4	5	9
P Canada has the type of people I can relate to	1	2	3	4	5	9
Q Canada's regions each have a different personality	1	2	3	4	5	9
(Always last) Canada is a popular destination to visit	1	2	3			

13. Compared to other possible destinations you could visit in the next two years, has Canada become more popular, less popular or stayed the same as a place to go for a... [READ LIST STARTING WITH TICK]

	<u>More</u>	<u>Stayed Same</u>	<u>Less</u>	<u>DK/NS</u>
() City Trip	4.. 1	2	3	9
() Touring Trip	2.. 1	2	3	9
() Outdoor 'hip	2.. 1	2	3	9

14. Finally, just a few questions so that we can classify your answer with the other participants to our survey.

a) Have you ever visited Canada on a pleasure trip?

Yes 1 → CONTINUE
 No 2 → GO TO Q.14c

b) IF "YES" TO Q.14a. ASK:

How many times in the past three (3) years have you visited Canada on a pleasure trip?

TIMES

0	0-	} → GO TO Q. 15
1	1	
2	2	
3	3	
4	4	
5 OR MORE	5 -	

c) IF "NO" IN Q.14a. ASK:

Have you ever considered visiting Canada?

Yes 1
 No 2

ALL RESPONDENTS:

15a) Have you seen any recent advertising for Canada?

Yes 1 → CONTINUE
 No 2 → GO TO Q.19a

15b) Was the advertisement about travelling to or vacationing in Canada?

Yes 1 → CONTINUE
 No 2 → GO TO Q.19a
 DON'T REMEMBER/DK ... 9 → CONTINUE

15c) Where did you see or hear this advertising? Did you see or hear it... [ROTATE FROM TICK START]

	<u>Yes</u>	<u>No</u>	<u>DK/NS</u>
() ON TELEVISION	1	2	9
() ON RADIO	1	2	9
() IN NEWSPAPERS	1	2	9
() IN MAGAZINES	1	2	9

16a) ALL REMEMBERING TELEVISION ADS AT Q.15c

Could you please tell me what you particularly remember about the television ad which you remember most? [PROBE FULLY]

16b) what else do you recall from these ads? [PROBE FULLY]

16c) What do you recall were your thoughts and feelings on seeing these advertisements for tourism to Canada? [PROBE FULLY]

17a) ALL RESPONDENTS HAVING SEEN ADVERTISING

As far as you can remember, who was the sponsor of the advertising for Canada? [DO NOT READ LIST]

- Air Canada 1
- Tourism Canada 2
- Government of Ontario 3
- Other [SPECIFY] _____

_____ 9 -

17b) Do you remember the slogan or theme phrase which was used to identify Canada in the advertisements?

- Yes 1 → ASK Q.17c
- No 2 → GO TO Q.17d
- DK/NS 9

17c) ALL SAYING "YES" AT Q. 17b

what was it? [DO NOT READ LIST]

- "Canada - The World 1 → GO TO Q.18
- "The World Next Door" 2 -

Other [SPECIFY] _____ | _____
 _____ → ASK Q.17d
 DK/NS 9.9 -

17d) ALL NOT REMEMBERING SLOGAN AT Q.17c

Actually, the slogan used in the ads was "CANADA - THE WORLD NEXT DOOR". Do you remember it now?

- Yes 1
- No 2
- DK/NS 9

18a) ALL RESPONDENTS SEEING ANY ADVERTISING

Did you do anything as a result of seeing these advertisements? Did you...

Make any new plans to travel to Canada in the next 12 months?

Yes 1 ----- GO TO Q.18c
No 2 --> ASK Q.18b
DK/NS 9

18b) ALL SAYING "NO" AT Q.18a

Did you consider the idea of travelling to Canada?

Yes 1 -----> GO TO Q. 18c
No 2 '> ASK Q.19
DK/NS 9

18c) ALL SAYING "YES" AT Q.18a OR Q.18b

Did you look into obtaining more information about travelling to Canada?

Yes 1 -----> GO TO Q. 18d
No 2 '> ASK Q.20
DK/NS 9

1ad) IF "YES" AT Q. 18c

Did you have any problems finding out where to obtain more information.. about travelling to Canada?

Yes 1 --> SPECIFY - | --> CONTINUE
No 2
DK/NS 9

18e) Where did you go to get the information? [READ LIST]

Yes No DK/NS
A Did you call an 800 number? 1 2 9
B Did you go to a travel agent? 1 2 9
C Did you send away for further information? . . 1 2 9
Or did you do something else? [SPECIFY]

D _____ --

SKIP TO Q.20

19a) ALL NOT HAVING SEEN ANY ADVERTISING AT ALL [AT Q.15]

Recently, there were some television, magazine and newspaper advertisements on tourism to Canada which uses a theme slogan or phrase. Do you remember what the slogan was? [DO NOT READ LIST]

"Canada - The World Next Door" 1 - |-----> GO TO Q.20
"The World Next Door" 2 - |

Other (SPECIFY) _____ |

DK/NS 9 - |-----> ASK Q.19b -

19b) ALL NOT REMEMBERING THE SLOGAN AT Q.19a

Actually, the slogan was "CANADA - THE WORLD NEXT DOOR".

Now, do you recall hearing or seeing this phrase or slogan in any recent

Yes 1
No 2

20. ASK EVERYONE:

Actually, there were two recent television ads which used the theme slogan, "CANADA, THE WORLD NEXT DOOR".

[READ FROM TICK START]

[TRAPEZE AD]

One ad showed scenes of a carved Indian mask, red-coated soldiers firing muskets, people rock climbing and horseback riding, a woman diving off a cliff, a leaping baseball player, neon lights in a city, a hotel in the mountains and a roller coaster.

Do you remember seeing this ad?

Yes 1
No 2
DK/NS 9

[RODED AD]

One ad showed scenes of a little girl playing on steps, a waterfall, people playing polo, a pole vaulter, buses touring the countryside, an opera ball, a rodeo cowboy, a Scottish band, and a foreign looking church.

Do you remember seeing this ad?

Yes 1
No 2
DK/NS 9

ALL RESPONDENTS

By now you may have realized that this survey is being conducted voluntarily on behalf of Tourism Canada. So that we can use your responses, we would like to ask you some questions that would be used for statistical purposes only. We want to assure you that your answers will be kept confidential in two ways: firstly, sensitive third party information is protected under the provision of Section 20 of the Access to Information Act, and secondly, your answers will be combined with those of other participants in the survey before being given to Tourism Canada.

21. Which of these age categories would you belong to?

- 25-29 1
- 30-34 2
- 35-39 3
- 40 - 44 4
- 45 - 49 5
- 50-54 6
- 60-64 8
- 65 + 9
- DK/NS 99

22. Which of these income categories includes your total household income?

- S 25,000 TO \$29,999 1
- s 30,000 TO \$34,999 2
- s 35,000 TO \$39,999 3
- s 40,000 TO \$44,999 4
- s 45,000 TO \$49,999 5
- S 50,000 TO \$54,999 6
- s 55,000 TO \$59,999 7
- S 60,000 TO \$64,999 8
- S 65,000 AND OVER 9
- DK/NS 99

23. What is the highest level of schooling that you have obtained?

- LESS THAN HIGH SCHOOL 1
- COMPLETED HIGH -L 2
- POST SECONDARY TECHNICAL 3
- STARTED COLLEGE/UNIVERSITY 4
- COMPLETED COLLEGE/UNIVERSITY 5

24. And finally, would you please tell me your zip code number?

Confirm Respondent's Phone #

Interviewer _____

Phone #: () _____

Date _____

Edited by _____

Coded by _____

Coding Edited by _____

THANK YOU VERY MUCH FOR YOUR TIME AND COOPERATION

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