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TOURISM INDUSTRY ASSOCIATION OF CANADA
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Destination Canada

Are we doing enough?



Audit • Tax • Consulting • Financial Advisory

Dear Reader,

Deloitte and the Tourism Industry Association of Canada (TIAC) are pleased to present the first in a series of planned research initiatives aimed at addressing critical challenges facing the Canadian tourism sector. This report looks at an ever-puzzling challenge – American travellers and their perception of Canada as a travel destination. We have gained valuable insight into what Americans think – not only across the nation, but across more discrete traveller demographics, including Generation X, Generation Y and Baby Boomers. Our future research initiatives will revisit these perceptions – with both American and international travellers – to gauge our progress and development as a world-class travel destination.

We have also reached out to Destination Marketing Organizations (DMOs) across the country for their thoughts and outlook across topics such as general travel trends and spending, government funding and new product development.

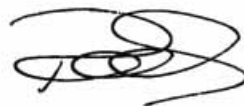
A special thanks to all the members of the Deloitte and TIAC teams who helped with this initiative. We also thank Hotspex for teaming with us, and introducing new and innovative ways to reach out to travellers.

We hope you enjoy this report, and we look forward to bringing you new industry research and insights in the future.

Sincerely yours,



Ryan Brain
Partner and National Practice Leader
Tourism Hospitality & Leisure
Deloitte



Randy Williams
President and CEO
Tourism Industry Association of Canada (TIAC)

“I think it reminded me that we have a
paradise right above us that we can explore.”

Survey respondent

“I’m glad I finally got the opportunity to say good things
about Canada, its culture and people. Thanks.”

Survey respondent



Canada: perceptions of American travellers

According to the United Nations World Tourism Organization (UNWTO), about 808 million international travellers were exploring the world in 2005, with worldwide receipts reaching \$800 billion. This was a massive increase over the 703 million travellers traversing the globe in 1990 and the 166 million reported in 1970. In 2006, the UNWTO reported global tourism to be up again by another 4.5%. That is the good news.

"Globally speaking, in the midst of so many exciting and new developments, Canada, unfortunately, is losing its once prominent place on the map," notes Ryan Brain, Partner and National Practice Leader of Deloitte's Tourism, Hospitality & Leisure practice in Canada.

The combination of more and more countries developing their tourism industries, growing investments in marketing, improving air access, and shifting tastes away from traditional European and American destinations in favour of more exotic locales, will continue to draw an increasing number of travellers away from Canada.

With competition among these countries for tourism dollars growing, "Canada is lagging behind many others in terms of investment," Randy Williams, President and CEO of the Tourism Industry Association of Canada (TIAC), points out.

In 1950, when only 25 million travellers were off to see the world, Canada ranked second in terms of inbound tourist numbers, and the top five destinations saw 71% of all the action. By 2005, Canada had dropped from the top 10 into 11th place, behind Mexico, Austria and Turkey, and the top five tourist destinations held only a 32.7% market share.

Today, the region of the world showing the weakest growth, at only 2.5%, is the Americas, "pulled down," according to a recent UNWTO report, by Canada and hurricane-hit Mexico.

According to John Kester, chief of the market intelligence department charged with producing the UNWTO annual study, the international perception remains that Canada is quiet, safe, dull, increasingly expensive and a hassle to enter when arriving at the U.S. border. "I don't think many people think of Canada as a very exciting destination," he told the *Montreal Gazette*.

Canada's travel deficit with the United States ballooned to \$4.5 billion in 2006, its highest level in 13 years. Not only are Canadians taking more trips south of the border, thanks to the strengthening dollar – 16 million overnight trips, to be exact – but fewer Americans are venturing north, due to

- a Canadian dollar topping \$0.90 U.S. and closing in on a 30 year high. Historically, the exchange rate has had the biggest impact on U.S. visits to Canada
- a slowing U.S. economy wracked by deficits widely believed to be unsustainable, higher interest rates, weak job growth and a deteriorating housing market, putting the squeeze on consumer spending
- escalating prices at the gas pumps
- confusion over stringent new border documentation and passport requirements pertaining to travel by land, sea and air, though this is expected to abate by 2009 once the Western Hemisphere Travel Initiative is fully implemented
- stepped-up border security measures since 9/11 and
- declining interest in and awareness of Canada as a travel destination, as opposed to international and U.S. destinations.

Herein lies one of the biggest, most vexing problems confronting Canada's tourism sector today.

Understanding the American traveller

Just hours north of the U.S. border, even in the depths of winter, the sheer variety of travel destinations and activities available to tourists arriving in Canada is impressive by any measure. They can observe polar bears, visit an indoor rain forest, indulge in the sensory pleasures of the latest spa treatments and world-class cuisines, all the while experiencing Canada's unparalleled multicultural diversity firsthand.

Why, then, is Canada not perceived as number one on Americans' travel agendas, exemplifying as it does a safe, escapist haven? Canada offers Americans geographic proximity, a close affinity with its people, few language barriers and the promise of discovery. Canada's diversity allows it to strike an ideal balance of the unfamiliar with the familiar.

Generally perceived as large, beautiful and above all safe, stable and secure, perhaps Canada has come to be seen as too safe, too predictable, even boring. When all that Canada is can be encapsulated in a few simple adjectives, or clichés, overall impressions tend to become blurry.

Knowing Canada has so much to offer Americans – everything they say they want in a vacation getaway (in all seasons) and as a place to live, work and do business – the challenge is how to convey that message so clearly and unequivocally that it really hits home and that entails learning as much as possible about what genuinely motivates the American traveller. This was the impetus behind the research Deloitte and TIAC, a national advocacy group representing over 200,000 tourism businesses, conducted recently and is the focus of this report.

Survey findings 1

Asked to rank statements describing Canada that respondents agreed were most true

- 71% Naturally beautiful
- 69% A safe country to visit
- 60% Many natural attractions
- 57% A good place for families to visit
- 56% Canadians are English speaking
- 56% People are friendly and hospitable
- 50% Culturally diverse

How Americans view Canada

Survey respondents were asked to describe Canada, as if it were a person.

"Friendly," "nice," "down to earth," "family-value oriented," "traditional" and "reliable" were all cited as top traits.

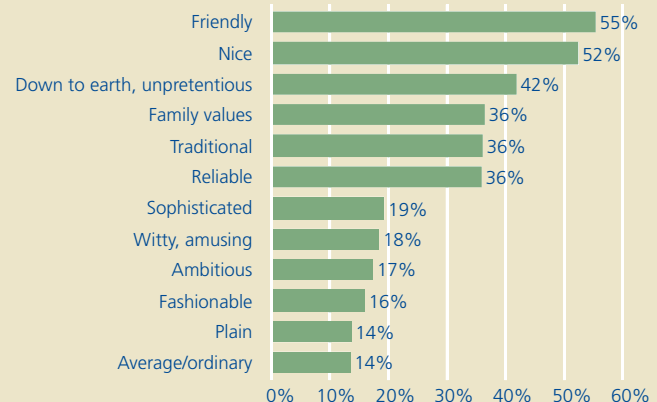
Asked whether they also associate Canada with more glamorous and exciting attributes, such as "sophisticated," "witty," "ambitious" and "fashionable," their responses were less favorable. Commented one respondent, Canada is "like an old friend...consistent but not that exciting."

"The challenge facing Canada is how to differentiate itself on the global stage as the competition for travellers heats up," notes Ryan Brain.

Could the quintessentially Canadian virtues also be perceived as a lack of distinctiveness by its neighbours to the south? Or, at best, merely elicit yawns or some variation of the expression "been there, done that? Likely so.

Branding campaigns of the past have proved entirely too successful at engraving images of the maple leaf, Mounties, moose and snow-capped mountains in the minds of tourists. According to the Anholt-GMI Nation Brand Index, a quarterly ranking of 35 developed and developing countries, how tourists' brand preferences are expressed, is, in fact, based largely on stereotypical notions. Yet despite those images reflecting only a tiny portion of Canada's reality, they have a disproportionate effect on people's perceptions of the country as a whole. The challenge then is for future campaigns to reposition Canada's image and cast it in a positive light – as fun, adventurous and exciting, a country to explore.

If Canada were a person, what would that person be like?



The disconnect between perception and reality

Ironically, outdoor activities such as skiing, snowboarding, snowmobiling, and boating – the very ones with which Canadians most closely identify as being somehow emblematic of the country – barely register on the radar screens of most U.S. respondents. In fact, when asked about their knowledge of these experiences, between 35% and 46% indicated they have a poor level of awareness about these offerings.

As the survey numbers make clear, Americans show a decided preference for visiting Canada in the spring and summer, followed by fall and winter, despite Canada's world renown as a winter playground. The numbers are telling: 63% have been to Canada in the spring versus 37% in the winter, even though only 20% of all respondents cited bad weather as a concern.

It is quite possible that tourists have been misinformed about Canada's other well-developed summer and all-season offerings, such as golfing, the performing arts, spas, retreats and fishing and hunting. Here is an opportunity to leverage and capitalize on Canada's existing tourism assets – outstanding, yet underexploited offerings well-suited to adventure-minded Baby Boomers and Generations X and Y – through more aggressive promotion and education programs.

"If consumers are not made aware of these products and services, they are not going to buy," says Williams. "It's that simple. The only way to be top of mind is to get an ad right in front of them just as they're making their decision about where to go."

Surprisingly few respondents were dissuaded from visiting Canada by the threat of global terrorism, pandemics or political instability. What apparently is reducing Canada's tourism numbers, judging by the panel's responses, are rising gas prices and the new passport requirements, cited by 25% and 24%, respectively. While these factors are beyond the tourism sector's control, they can be mitigated to some extent through imaginative promotion and marketing campaigns.

Age is by far the biggest differentiator

Notable about this survey is its generational focus, allowing it to pinpoint and highlight divergences in knowledge, opinions and experiences among different age groups. This narrowing of the aperture is crucial in helping stakeholders in the tourism sector decide where best to invest their marketing and infrastructure dollars over the next five years.

Members of the Baby Boom (1943-60) and Silent (1925-42) generations, those termed the "experienced generations," make up 33% of survey respondents, while 67% are members of Generations X (1961-81) and Y (1982-2001), or the "contemporary generations." Distinct differences in their experiences, attitudes and perceptions clearly emerge in the survey findings. The one similarity is a strong desire for new and exciting travel experiences and adventures.



Destination Canada
Are we doing enough?



The experienced generations have an altogether more favorable impression of Canada, choosing the words “friendly,” “down to earth” and “honest” as descriptors. Most have visited on more than one occasion and plan to return. They also have a firmer grasp of all that Canada has to offer – from coast to coast to coast, from rustic outposts to the heights of cosmopolitan culture. Amazingly, they even report knowing more about Canada’s nightlife than any other generation.

The contemporary generations proved to be the most lukewarm about Canada, rating it as an average place to vacation, or just “plain.” Among the least likely to visit any time soon, many see Hawaii and Central and South America on their travel horizons over the next few years. That they are clearly adventurous, however, is borne out by the fact that they have taken more trips to Asia than any other demographic.

To their credit, the contemporary generations reported knowing more about Canada’s skiing, snowboarding, snowmobiling, professional sports and spas than the Boomers. However, a small but notable proportion of the youngest respondents actually dubbed the idea of travel to the “Great White North” boring. In addition, these generations – with the least amount of knowledge about Canada were able to offer no particular reason for their lack of interest in going to Canada, even when their perceptions are on the whole positive.

The good news is that those who have been to Canada, whether on vacation, business or to visit family and friends, are generally the same people who wield real economic clout – the experienced generations. They are among the most active, affluent, well-educated and adventuresome travellers in the world. It is the latter trait that most connects the generations.

The question is, how can Canada reignite their sense of wonder and wanderlust as an exciting (as opposed to merely warm and friendly) travel destination, when their hunger for authentic, exotic, life-changing travel and luxury recreation has never been greater? After all, no one knows better than the Boomers and their parents that you only live once.

“Never underestimate how much adventure Boomers are looking for. The concept of ‘forever young’ is alive and well,” observes Ryan Brain.

The Boomer cohort and their elders have accumulated more wealth and have more spending power, over \$1.7 trillion a year, than any other age group in history. According to the Conference Board of Canada, it is the Boomers, some 78 million Americans, responsible for

\$200 billion in travel spending, who will be driving the travel market well into the next decade. More than half-a-billion people in the world today, a figure expected to rise to 700 million by 2020, are already age 60 or older. Of all the demographic segments, it is generally this group that boasts the most spare time and discretionary spending, making it an important market for the tourism sector.

At the same time, it is imperative to remember that the contemporary generations are the future of Canadian tourism. By not making an effort now to shape their travel habits and perceptions by keeping them informed about all Canada has to offer, the sector will be facing a dramatic decline in tourism dollars in the years ahead. This would be a pity, because for those with a true taste for adventure – and we know the Baby Boomers, Generations X and Y are all up for it – the range of possibilities in Canada is truly amazing: everything from heli-skiing to snorkelling with the seals and sipping champagne in an ice hotel at midnight.

Survey findings 2

Services/experiences perceived to be good or excellent

- 55% Wildlife viewing
- 54% National and provincial parks
- 53% Restaurants/food
- 53% The people
- 50% Fishing and hunting

Gender matters

Survey findings also indicate that, in general, males travel more frequently than females and are more likely to visit Canada for business, pleasure or both. What’s more, they took more trips to Canada, Alaska, Australia, New Zealand and Hawaii in the last three years and are more likely than females to visit these places again in the next three.

As a result, men and women differ greatly in their knowledge of Canada’s travel services and experiences, with a greater proportion of males reporting theirs to be “good,” save in the shopping, museum and performing arts categories. On the other hand, female travellers reported knowing little about most of the services and experiences that Canada has to offer.

Interestingly, more respondents described Canada as “masculine” than “feminine,” a perception that might account for the shortfall in female visitors. That said, the research clearly indicates that Canada is perceived to be a safe and stable country by 70% of the females polled. If for no other reason, it should be top of mind as a vacation

destination for women as well as families, seniors and others who seek safety and security in their travel destinations. Cost also figured as an issue for the female, as opposed to male demographic, though fewer than 20% of all respondents thought Canada too expensive.

Geography matters: The hardest hit segments

In 2006 as compared to 2000, 34% fewer Americans visited Canada, according to figures compiled by Statistics Canada. Despite U.S. visitors making 13.8 million overnight trips in 2006, the number is still 4.5% lower than the previous year, marking its fourth consecutive year-over-year decrease, and bringing it to its lowest level since 1997.

Same-day auto travel plummeted at an even faster rate, reaching the lowest level since recordkeeping began in 1972. In 2006 it decreased by 12%, compared to 2005, and declined almost 50% compared to 2000. The decline is due to a raft of political and socio-economic factors, including the exorbitant price of gas, strong Canadian dollar and confusion surrounding new regulations governing travel documents.

Residents of long-haul states are a largely untapped market since they generally already hold passports, boast higher household incomes and tend to be less sensitive to exchange rates and gas price fluctuations. Moreover, according to the survey findings, they take five or more trips a year. For a solid 70%, however, the continental U.S. tops the list of preferred destinations, followed by Hawaii, the Caribbean, Europe, Mexico and, last of all, Canada. Only 37% thought it likely they would make a trip to Canada in the next three years.

A greater proportion of those who live in short-haul states (close to the Canadian border) think they have a good knowledge of Canadian services and offerings compared to those in long- or mid-haul states. This is primarily because they are more likely to have visited Canada and are more familiar with and positive about its restaurants, shopping, nightlife, beaches, theme and amusement parks.

While visitors to Canada from short-haul states continue to report having positive experiences, this is a declining market segment due to the current economic and political climate in the U.S.

"Given both the perceived and real challenges facing U.S. citizens crossing the border into Canada, markets such as Niagara Falls are sorting through a number of issues in an attempt to keep short-haul American travellers coming back," explains Jason Burgess, Deloitte's Tourism, Hospitality & Leisure industry practice leader in Southwestern Ontario.

More attention, in particular, needs to be paid to those living in long-haul states since they travel more frequently and generally have more discretionary income. Travellers from mid-haul states also present a potent marketing opportunity, being the least likely at present to visit, preferring instead the Caribbean, continental U.S. and Europe. Canada's offerings are comparable to the latter two, suggesting the industry should be able to capture at least a portion of this market.

The business traveller

The majority of survey respondents consider Canada a good place to do business, live and vacation (55%, 59% and 76%, respectively). According to the survey, most people visiting Canada on business intend to return to vacation or to visit family and friends. The inverse is not necessarily true, however, as only 14% of those who have been here on vacation intend to return to conduct business in Canada.

Canada is clearly making a good impression on business travellers, which is extremely important given that combining business and leisure travel is an emerging trend. It might also be the best opportunity Canada has to capture the contemporary generation's attention since, judging by the survey findings, Generations X and Y come to Canada more frequently for business purposes than Boomers, which is not surprising given the number of Boomers who have reached retirement age.

A strong appetite to return, plus a pinch of forgetfulness

However enjoyable their time here, many visitors cannot be counted on for a return engagement. As Canadian Tourism Commission President and CEO Michele McKenzie observed in an interview she gave the *Montreal Gazette*, "We find that people feel very positively toward Canada as a country, but don't necessarily know how they would translate that into a vacation experience." Or, as one of the survey respondents so aptly put it, "I like thinking about Canada. I have been there before, but I forget to think about it when planning a vacation."

Out of sight, out of mind. To ensure Canada is not forgotten once visitors leave, marketing initiatives such as in-room literature, in-flight commercials and discounts for returning visitors should be considered as an important supplement to conventional travel promotions. Many respondents asked for more information about Canada because the survey piqued their interest. Their appetite is real, so a way must be found to better exploit it.

What are Canada's destination marketing organizations doing?

TIAC and Deloitte surveyed a number of DMOs from across Canada, asking them to assess, on a scale from "much worse" to "much better," tourism performance in their respective regions in 2006, compared to 2005, and what they deemed their prospects to be in 2007, as compared to 2006.

In addition, they were asked to share their observations about what they perceived to be general trends over the past few years with regard to the introduction of new tourism products and services, as well as indicate whether government investment had increased, decreased or stayed the same.

The majority of respondents, 46%, in assessing year-over-year performance for 2005-06, reported the picture overall to be "better," 10% "much better" and 29% "equal." DMOs in the "much-worse" category were at 2% and those in the "worse" category at 12%. All those in the latter categories represented DMOs from smaller markets.

The picture brightens considerably concerning their prospects for 2007, with 54% forecasting "better" results and 4% expecting all things to be "equal." Only 2% expect "much better" results, while 5% are expecting their situation to worsen.

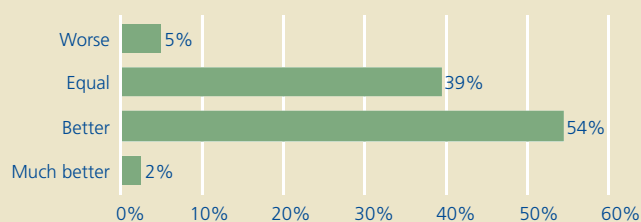
As for DMOs' views on how things are shaping up concerning the introduction of new products and services, a healthy 68% reported a substantial increase. These came in the areas of agri-tourism, waterfront rejuvenation, winery growth, golf course expansions, health-and-wellness services and cultural tourism.

Awareness about Canada's spa facilities and golf courses, for example, proved to be low among U.S. respondents (8% and 6% respectively), suggesting that while the ramping up of these offerings will require a substantial marketing investment, they will also offer new market opportunities.

Canada's growing cultural diversity is now spreading outside major centres such as Toronto, which boasts a huge Chinese and Afro-Caribbean population, into some of the smaller towns and cities across the country. This is leading to a raft of new festivals and events celebrating cultural discovery. The more these products can be promoted the better since 50% of survey respondents already think Canada is culturally diverse.

A key challenge for DMOs will be to direct their energies toward combatting the decline in U.S. tourism. Understanding the needs, wants and perceptions of Baby Boomers will be integral to their success, though efforts still need to be made to capture the attention of the contemporary generations to ensure sustained tourism levels in the future. The not-so-subtle message here: know your market inside and out.

What are your prospects for tourism performance in your destination in 2007 as compared to 2006?



Survey findings 3

Services/experiences deemed less than good/excellent

- 21% Professional sports
- 18% Spas/retreats
- 15% Theme and amusement parks
- 14% Beaches
- 13% Golfing

Where to go from here

Tailor tourism products for the Baby Boomer market

The demographic divide between the generations these survey findings reveal is so pronounced and unequivocal that it underscores the importance of tailoring travel products and services along age-related lines. Beyond a doubt, the Baby Boomer and Silent Generations are the key target markets to address now and for at least the next 15 to 20 years. They are the most affluent and primed for exciting travel offerings. Canada can offer them no end of possibilities.

Position Canada as an adventure destination

Recognizing that Generations X and Y are the rearguard and will soon overtake the Boomers in their lust for adventure travel, they must be vigorously wooed, the groundwork laid now, if tourism levels are to be sustained well into the future. While all four generations have a taste for adventure travel to exotic locales, the wilds of Canada are just the ticket for the contemporary crowd. But the only way they can be enticed to visit is if they are made aware of all that awaits them.

Do more to promote winter sports

Renowned as Canada is worldwide for the breadth and depth of its winter sporting activities, the American travellers surveyed seem to be largely unaware of this fact, with the majority reporting they scheduled their visits for the spring and summer. With the 2010 Olympic Winter Games in Vancouver on the horizon, the time is ripe to start promoting Canada's strengths in this regard. The best way to appeal to Generations X and Y, is to focus promotions on the exciting and unique aspects of some of these sports.

Court business travellers

Another key finding to emerge is how important it is to court business travellers and lavish as much attention on them as possible, especially given the current trend of combining business and leisure travel. While they may have crossed the border on their company's tab, rather than of their own volition, most come away with so favorable an impression that they return to vacation with their families and friends.

Sell safety first – to women, families and seniors

Generally perceived as large, beautiful, and above all safe, stable and secure – a need for Americans – Canada ranks number one in the world for safety on the FutureBrand 2006 Country Brand Index. Women, above all, are the perfect market for this message and are also likely to be the most receptive.

Think family friendly

FutureBrand also ranks Canada third in the world for appealing to families, thanks to welcoming and diverse activity options and a huge selection of accommodation options at every price point. Families with teenagers are more likely to have been to Canada than those with young children and think it is a good or excellent vacation destination. Those with children five years and younger are more likely to think Canada an average place to vacation. Promoting safety in this category as well should help attract families with young children.

Look to American mid- and long-haul states

It is now glaringly apparent that short-haul travellers, though they remain Canada's biggest market, are rapidly declining in number. It is time to look further afield – to the largely untapped long-haul and mid-haul segments of the U.S. that, if targeted effectively, have the potential to boost tourism numbers.

Be prepared to compete on the world stage

Competition among countries is as fierce as competition among businesses. The more tourists traversing the globe – and the Baby Boomers are largely to thank for that – the fiercer the competition becomes. As more and more markets open up, Canada will have to fight harder than ever to keep its share of the pie by being as price competitive as possible and investing more heavily in advertising.

Counteract Canada's "boring" image

Based on past marketing efforts, Canada has come to be seen in the world's eyes as something of a travel commodity – as too safe, too predictable, even boring. When all that Canada is can be captured in a few simple words, the three Ms – Mounties, moose and mountains – it becomes that much more difficult to appeal to mature markets, notably the U.S. The best way to combat negative perceptions is to prove them wrong by emphasizing all that is right about Canada.

Stress the unparalleled variety of destination choices

The range of possibilities is truly amazing: everything from kayaking by moonlight in British Columbia, enjoying the beauty of the Rockies, a round of golf under the midnight sun in Yukon, to experiencing a traditional Aboriginal ceremony in Saskatchewan, marvelling at the European flavour and sophisticated nightlife of old Quebec and whale watching off the coast of Newfoundland. Generations X and Y won't know which activity to choose, or which part of Canada to head to first.

Canada must develop niche products and services tailor-made to match the unique characteristics of its diverse regions and the demographic profile of its visitors. To accomplish this successfully, Canada's tourism sector must continue to understand the perceptions and desires of those visiting and continue to invest in and promote new and existing products and services. All industry stakeholders should work collaboratively to show America, and the world, what Canada has to offer.



Destination Canada

Are we doing enough?

The survey panel

Gender

49%	Male
51%	Female

Age

4%	Silent Generation (1925-1942)
29%	Baby Boomers (1943-1960)
56%	Generation X (1961-1981)
11%	Generation Y (1982-2001)

Geographic

34%	Long-haul
35%	Mid-haul
31%	Short-haul

Work status

69%	Working
9%	Retired
22%	Not working

Marital status

61%	Coupled
39%	Not coupled

Children living in house

57%	No children
33%	1 to 2 children
10%	3 or more children

Education

31%	High school or less
69%	Postsecondary

Household income

7%	0-20K
21%	20-40K
19%	40-60K
16%	60-80K
11%	80-100K
18%	100+
8%	Not sure/rather not say

Valid passports

58%	Yes
42%	No

Methodology

The Deloitte Tourism, Hospitality & Leisure team and the Tourism Industry Association of Canada (TIAC), in league with many influential industry stakeholders, is dedicated to doing everything possible to gain a more comprehensive understanding of how the world views Canada, starting with its single-most important, yet problematic travel market, the United States.

This research study marks the first in a series Deloitte plans to conduct in partnership with TIAC. The intention is to solicit, on an ongoing basis, the opinions, beliefs and perceptions of individuals about Canada, all confirmed travellers, in key tourist markets around the world.

In 2007, Deloitte and TIAC conducted two surveys: an online survey of 3,000 people, which was narrowed down to 1,225 qualified U.S. respondents, all avid travellers 16 years of age and older, and an online survey of 41 DMOs representing thousands of tourism organizations, aimed at determining the types of investments they are making in developing new products and services in their respective regions.

The survey on U.S. perceptions was administered by Hotspex, a full service marketing research firm that delivers provocative marketing and innovations insights through their proprietary methodologies, one of which, PersonaSpex™, a multifaceted identikit that personifies a brand in terms of its image, personality and character, was employed in this survey. It enables clients such as those in the tourism sector to develop ideas, and position brands and communications that will truly connect with consumers.

The report team

Deloitte

Ryan Brain
Adam Brown
Jason Burgess
Carmen Chalmers
Jasmine Davis
Andy MacCulloch

TIAC

Jennifer Hendry
Chris Jones
Randy Williams
Susan Wong

Hotspex

Adam Burt
Mario Elizondo
Jeff Ku
Ted Langschmidt
Nitin Patel
Jacquie Smollett
Craig Thompson
Carl Tucker
Peggy Wai
Liling Xiang

The Deloitte logo, consisting of the word "Deloitte" in a bold, white, sans-serif font, followed by a white period.The Hotspex logo, featuring a white infinity symbol followed by the word "hotspex" in a white, lowercase, sans-serif font, with a trademark symbol (TM) to the right.

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Deloitte is the leading professional services firm providing solutions to the Tourism, Hospitality & Leisure industry.

The Tourism Industry Association of Canada (TIAC) is the national private-sector advocate for Canada's \$66.9 billion tourism sector. It performs a unique and pivotal role in ensuring the Canadian business and policy environment works for tourism, by communicating its importance to Canadians, advocating positive measures, and lobbying government for action.

Hotspex delivers provocative marketing research and innovation insights that help our clients to confidently make informed and inspired decisions. Our world class research solutions are distinguished through leading edge technology, proprietary consumer understanding methodologies and above all passionate employees that bring all this to life.

One of the tools employed in this survey, PersonaSpex™, part of our revolutionary MarketSpex™ solution, is a multifaceted identikit that personifies a brand in terms of its image, personality and character. This enables clients to develop ideas, and position brands and communications that truly connect with consumers.

For more information, please contact:

Ryan Brain

Partner and National Practice Leader
Tourism Hospitality & Leisure
Deloitte
416-643-8210
rbrain@deloitte.ca

Randy Williams

President and CEO
Tourism Industry Association of Canada (TIAC)
613-238-8765
rwilliams@tiac.travel

www.deloitte.ca

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