DESTINATION CANADA

Global Tourism Watch

2015 Brazil Summary Report

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1. Introduction

Destination Canada (formerly the Canadian Tourism Commission) began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to expand the base of consumer-based intelligence in twelve core markets around the world[1].

The overall objectives of the GTW study are to:

1. Monitor awareness, travel intentions, and other key market indicators for Canada and the regions;
2. Assess perceptions of Canada and track brand performance against the competitive set over time;
3. Identify the general experiences sought by travellers, assess Canada's competitive positioning on key products and identify growth opportunities;
4. Identify motivators and barriers for travel to Canada; and,
5. Explore the role of advocacy in the tourism context.

In response to a rapidly changing travel marketplace, Destination Canada and TNS worked together to substantially revise and update the questionnaire prior to the 2014 fieldwork. This was done to better reflect current travel realities and to gather more in-depth information on Canada's competitors in each market. The new GTW data permits direct comparison of Canada to those competitor countries unique to each market. The revised 2014 survey was used as the basis for the 2015 survey with minor modifications.

This particular report focuses on the Brazilian market. Destination Canada has designated the US, France, the UK, Mexico, Australia and Italy as the primary competitor destinations when it comes to attracting Brazilian travellers. These destinations will represent the primary points of comparison for Canada throughout this report.

Methodology

In July and August 2015, a web-based panel survey was conducted by TNS. The target population for the online survey was residents aged eighteen years and older, who had taken a pleasure trip outside of South America where they stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past three years, or intended to take such a trip in the next two years. The survey consisted of 1,488 respondents in 9 of the largest metropolitan areas of

[1] Identified by Destination Canada as the international 'long-haul' markets of: Australia, Brazil, China, the UK, Germany, France, India, Japan, Mexico and South Korea, as well as the US and the domestic Canadian market.

Brazil - Brasilia/Distrito Federal, Belo Horizonte, Curitiba, Fortaleza, Porto Alegre, Recife, Rio de Janeiro, Salvador, and Sao Paulo and included 199 recent visitors to Canada.

2. Strategic Considerations

The research findings of the 2015 Brazil GTW study reveal three key areas strategic considerations:

- Target Younger Travellers

  In the Brazil market, Destination Canada should move towards targeting younger travellers. In the past Destination Canada has taken an approach of promoting Canada as a multi-generational destination and has targeted a wide age range of consumers from students to grandparents. The research findings from this study suggest that it is prudent to now execute a more narrow marketing strategy in Brazil.

  Those over the age of 54 are the most difficult demographic to convert, as they are the least interested in visiting Canada. Yet, Brazilian travellers that are 55 years of age or older are disproportionately aware of advertising for Canada. In order to maximize return on investment in Brazil, it is essential to target those more receptive to Canada's offer. Continuing to appeal to a broad range of age cohorts risks diluting both the Canada brand and the power of its marketing spend.

  Canada has achieved some momentum in the Brazil market since 2012, when the GTW was last conducted in Brazil. This momentum is particularly evident among travellers who are 18-34 years of age. The Brazilian market, in particular, would benefit from a focused Millennial strategy. However, additional research analysis should be conducted on Millennials in this market to inform this strategy and ensure that, to the extent possible, it is inclusive rather than exclusive of other potential visitors. Nurturing the affinity this group has for Canada will yield growth for Canada in the future, as it lays the foundation for Canada to capture a share of their lifetime travel spend.

- De-emphasize Functional Messaging and Establish an Emotional Core in Future Advertising

  Destination Canada should de-emphasize functional messaging in its communications and focus on establishing a strong sense of place as the emotional core of its future advertising efforts. Once a Brazilian traveller reaches the *consider* stage of the purchase cycle for a trip to Canada, their knowledge about Canadian travel opportunities plateaus. This means those in the purchase stage are no more knowledgeable about Canadian vacation opportunities than those who are merely in the first stages of considering a trip. This is an important insight as it demonstrates that it is not gathering more information about vacation opportunities in Canada that brings consumers further along the purchase cycle.

  That being said, it is important not to fully abandon all functional communication. However, it is important to deliver this type of messaging to the consumer when they are most receptive to receiving it (for example, targeting those who have recently searched for information regarding travel and accommodation).

The key to a successful marketing strategy in Brazil will hinge on the ability to promote a brand identity for Canada that mixes the aspirational with the attainable. In order to do this, it is simply not enough to showcase that Canada is capable of delivering the types of activities that travellers are seeking - those activities must be always be framed in the context of the *sense of place* that Canada offers.

Ultimately, the marketing strategy should be developed around three of Canada's Unique Selling Propositions (USPs): 1) Vibrant cities on the edge of nature, 2) Personal journeys by land, water and air, and 3) Active adventure among awe-inspiring natural wonders. Brazilians are interested in atmosphere and adventure. However, it should be kept in mind that the adventure activities they seek are more *soft* in nature rather than *extreme*. These are the type of travellers who want the ability to take a day trip to see awe-inspiring nature and then enjoy the vibrant atmosphere of the city when they return.

- Don't Ignore the Current Strength of the United States in the Brazil Market

Brand USA was officially launched in the Brazilian market in 2013, and the findings of this study confirm that it has been a successful initiative. The United States has made large gains since this study was last conducted in 2012 - most notably, on the metric of Net Promoter Score. In 2012, both Canada and the US had a NPS of +59. In 2015, Canada's NPS has decreased six percentage points. In contrast, the US has increased its NPS by thirteen points and is now ranked first out of all the competitive destinations on this metric.

Destination Canada must recognize that the United States is its biggest competitive threat in the Brazilian market. Canada must take learnings from the US strategy, so that it can put forth a brand identity that is implicitly, but unmistakably, differentiated from that of the United States. If not, the Canada brand risks being overshadowed by its fellow North American competitor in this market.

3. Key Observations

The following section summarises the key points of interest from the 2015 survey of Brazilian long-haul travellers.

Key findings:

- In 2012, the number of Brazilian travellers estimated to be in either the *evaluation* or *purchase* stages of the path to purchase for a trip to Canada was 951,000. In 2015, that number has grown to 1,290,000. This estimate reflects that 38% of Brazilian travellers have stated that they are in the latter stages of the purchase cycle, which is up from 28% in 2012.

- 44% of Brazilian long-haul travellers consider their knowledge of vacation opportunities in Canada to be 'excellent' or 'very good' – a metric that has remained stable since 2012. This places Canada in the middle of the pack among the competitive set on this metric. Canada outranks the U.K., Australia and Mexico in this regard, but falls short against the US, Italy and France.

- Brazilian travellers show a strong interest in Canada, with 83% indicating that they have some interest in visiting in the next two years. This indicates that there is a solid base of openness to Canada in Brazil. However, the 'top-tier' destinations in the minds of Brazilians are dominated by the United States, France, and Italy.

- Canada has remained stable on metrics related to value since 2012, However, there has been improvement on perceptions related to price. Canada's has improved on all individual attributes related to price. In relation to the competition, Canada's strongest improvement is on offering good value for the money, where it rose from 5th to 3rd position amongst the competitive set.

- While there are a variety of features that excite the Brazilian long-haul traveller about Canada, there are two key aspects in particular that stand out: 1) appreciating Canada's nature and scenery, and 2) experiencing Canada's atmosphere.

- When travelling abroad, Brazilians prefer touring and city vacations. Older travellers (ages 55+) tend to visit friends and relatives at a higher rate compared to younger Brazilians.

- In the past twelve months, Brazilian long-haul travellers considering a trip to Canada have received information about destinations from a variety of sources. Websites are the most common source of information about Canada, followed closely behind by friends and family in person.

- The proportion of travellers who are in the *purchase* stage has doubled from 5% to 10% since this data point was last collected in 2012. This, again, suggests momentum exists for Canada in this market.

4. Market Health and Outlook

Background

The Brazil economy

In 2015, the Brazilian economy experienced four consecutive quarters of economic contraction and is on course to experience the most significant recession since the Great Depression (Leahy, 2015 December 1). The Brazilian economy contracted by 3.7% for 2015 and is estimated to contract a further 2.95% in 2016 which will mark two consecutive years that Brazil will face a recession (Biller, 2016 January 4). The Organization for Economic Co-operation and Development forecasts a modest recovery for Brazil, to begin in 2017 (OECD, 2015).

A combination of economic and political factors has contributed to the economic downturn in Brazil. These factors include a decrease in overall global growth rates, which resulted in a decrease in trade activity for Brazil and its trading partners, with a decline in China trade being a significant factor (Leahy, 2016 January 6). In addition to a slowdown in global economic trade, global commodity prices have decreased, directly impacting the commodity-driven boom Brazil has experienced over the last decade (British Broadcasting Corporation, 2015 August 28). Domestically, increases in interest rates to 14.25% (British Broadcasting Corporation, 2015 August 28), have impacted overall Brazilian consumer spending which also led to 4.5% decrease in household consumption as compared to the same period in 2014 (Cascione & Haynes, 2015 December 1). The combination of the rise in inflation rates and the drop in value of the Brazilian Real (against the US Dollar) has raised the relative cost of goods and overall cost of consumer consumption. Towards the end of 2015, the inflation rate in Brazil was 10.3%, the highest level seen in the past 12 years (Wheatley, 2015 November 19), and the Real dropped 24% against the US Dollar (Malinowski & Biller, 2015 August 24).

From a political perspective, Brazil is currently undergoing its largest corruption scandal, commonly referred to as the “Car Wash” investigation (Leahy, 2015 December 1). As a result, the Brazilian Supreme Court has issued arrest warrants for government and business officials. The Car Wash scandal has negatively impacted business and consumer confidence for domestic and international investors, as well as the confidence that Brazilian citizens have in their government’s ability to overcome this economic crisis (Phillips, 2015 September 16).

The weak economic conditions of 2015 are in stark contrast to the positive economic boom Brazil has experienced from 2003 to 2013. From 2006 onwards, GDP growth in Brazil has been steadily declining. In 2006 to 2010 Brazilian GDP averaged 4.5%. From 2011 to 2014, Brazil’s GDP growth dropped to an average of 2.1% and at the end of the first half of 2015, Brazil officially entered a recession as it experienced two consecutive quarters of negative economic growth (World Bank, 2015).

Travel outlook

As a result of the economic boom experienced over the past decade, Brazilian travellers have led the Americas in terms of growth in the amount spent on trips abroad (Merco Press, 2012 December 14). From 2009 to 2014, Brazilians tourism expenditure in international countries has grown by 17 million US dollars, from 13 million to close to 30 million in 2014. However, most of this growth occurred prior to 2013 (World Tourism Data, 2015).

Brazilians are not immune to the negative economic downturn as 45% of Brazilian travellers' believe that a recession would have an impact on their travel plans (Merco Press, 2012 December 14). With the ongoing devaluation of the Real, the travel habits of even the more affluent Brazilians may be impacted as long-haul travel becomes relatively more expensive when converting the Real to foreign currencies (ITB, 2014).

Travel trends

In 2014, 32% of travel packages sold in Brazil were for international travel. 29% of travellers visited North America, 27% visited Europe and 22% visited other countries in South America (Brazilian Tour Operators Association, 2015). While North America is a highly desirable destination for Brazilian long-haul travellers, the US captures a considerably larger share of this market in comparison to Canada. In 2014, Brazilians travelled to the US at 20 times the rate of those who chose to visit Canada (Destination Canada, 2015). In order for Canada to capture a larger share of the Brazilian long-haul travel market, it will require active consideration of the tastes and habits of Brazilian travellers. The following section is a review of trends related to the Brazilian outbound long-haul travel market, identified through secondary research conducted for this report:

- Brazilian travellers choose their destinations based on a variety of desires for different travel experiences. The top categories of experience that drive Brazilian's choice among different destinations include experiences that relate to a destinations culture and history, the availability of shopping/recreation, and availability of sports sites, theme parks and opportunities to gamble (World Tourism Organization, 2013).

- When deciding on destination choices, Brazilians are strongly influenced by the content they view through Telenovelas' (soap operas). Upon realization of this trend, the Tourism Australia organization invested in four episodes of a highly popular Brazilian Telenovela that filmed in Australia. As a result, Australia experienced a 19% increase in arrivals from Brazil between 2014 and 2015 (Meacham, 2015).

- Brazilian travellers begin to plan, research and book their travel one to three months prior to departure (Brazilian Tour Operators Association, 2013) and rely on a combination of information from family and friends (NBTC Holland Marketing, 2013), advice from travel agents and various online services such as price comparison and traveller review websites (Tech in Brazil, 2015).

- Brazil is one of the most technologically literate countries in Latin America (Cohen, N.D.). 91% of Brazil's internet users are active on social networks and spend over 10 hours per month on these networks (Brazilian Tour Operators Association, 2013). When gathering information on potential travel destinations, 80% of social media users in Brazil use these platforms as a tool to identify special travel offers (UNWTO, 2013).

- The average long-haul Brazilian traveller has a higher income and desires a certain standard of luxury and comfort when travelling (Cohen, N.D.). For Brazilians, international travel acts as a form of social currency that is used as a proxy for status and lifestyle (Tourism Intelligence Association, 2013). When travelling to North America, opportunities for shopping are highly desired by Brazilians and typically rank at the top of activities engaged in when abroad (Garcia-Navarro, 2013 August 14).

The negative economic conditions experienced in Brazil during 2015 have understandably decreased the forecasted rate of growth of the number of outbound Brazilian long-haul travellers. The preceding decade-long period of high economic growth in Brazil has created a long-haul travel market that accounted for an estimated 7 million trips outside of South America in 2014 (Destination Canada, 2015). For Canada to capture a larger share of the market of Brazilians travelling to North America, it can capitalize on the relative increase in travel expenses associated with the drop of the Real against the US dollar. If the value of the Real continues to decrease in comparison to the US dollar, Brazilians will view the US as a more expensive destination option. At the end of 2015, the value of the Canadian currency has fallen to its lowest levels since 2003 (Babad, 2016). As a result of the weakened Canadian dollar, long-haul travellers from Brazil may potentially view Canada as a destination option that offers greater value as compared to the US.

Certainly, leveraging currency exchange rates to demonstrate price and value advantages represents significant short-term opportunity in Brazil and should be an area of focus in current planning. However, the longer-term goal of establishing a strong growth-oriented brand positioning for Canada based on offer substance should not be ignored.

5. Market Potential

Exhibit 5-1 provides an estimate of the size of the potential market for Canada in two ways. The first is a broader macro-level figure based on expressed interest in Canada, and the second is a narrower estimate of the immediate potential based on likelihood of travelling to Canada in the next two years. Both estimates are derived from the 2010 omnibus study of the Brazilian adult population.

The target market estimate encompasses all those who have an interest in visiting Canada in the next two years among all adult Brazilian long-haul travellers. To calculate this figure, the proportion of Global Tourism Watch respondents who expressed interest in Canada is applied to the general traveller population. The result is a target market estimate of 2.8 million potential visitors – a figure that has remained unmoved since the 2012. This stability is perhaps unsurprising given that over four-in-five (83%) Brazilian travellers have an interest in visiting Canada, and it would be difficult to grow the target market further. Instead, it will be important for Destination Canada to maintain the current levels of interest in order to ensure a strong base of potential visitors to Canada in the future.

The immediate potential is a more moderate estimate of the potential market based on those who stated they were ‘definitely’ or ‘very likely’ to travel to Canada. This calculation provides an estimate of 2.0 million travellers who demonstrate a stronger potential for conversion – a number that accounts for 71% of the target market. However, it should be noted that previous market research efforts have revealed that Brazilians have a tendency towards overstatement. Therefore, caution should be used when interpreting data related to immediate potential.

A more conservative estimate of Canada’s short-term potential is to look at the number of long-haul travellers who are in the latter stages of the purchase cycle. This includes those who are either in the *evaluation* or *purchase* stage for a trip to Canada. In 2012, the number of Brazilian travellers estimated to be in one of those two stages was 951,000. In 2015, that number has grown to 1,290,000 – reflecting that 38% of Brazilian travellers have stated that they are in the late stages of the purchase cycle (up from 28% in 2012).

While the size of the overall target market may have plateaued, the increase of travellers who are further along in the purchase cycle indicates that there is momentum for Canada in the Brazil market.

Exhibit 5-1 Size of the potential market to Canada (next two years)

Measure	Size Of Potential Market To Canada
Total potential international pleasure travellers (aged 18 plus)	**3,397,000**
Target market for Canada	
Definitely / very / somewhat interested in visiting Canada in the next two years	83%
Size of the target market	2,819,500
Immediate potential for Canada	
Will definitely / very likely visit Canada in the next two years[2]	59%
Immediate potential	2,004,000

Base: International pleasure travellers (n = 1488)
Notes: Interest and consideration numbers shown are from the 2014 GTW results. Potential market size are results from the random telephone omnibus survey undertaken in 2010 (n = 2,015), among the general population aged eighteen years or older.

Q5: How interested are you in taking a trip to Canada in the next two years?

Q14 / 15: Realistically, how likely are you to take a vacation trip of four or more nights to Canada in the next two years? And, how likely are you to take a vacation trip of one to three nights to Canada in the next two years? Please include trips to other countries that would involve a stay of one to three nights in Canada.

[2] Includes respondents likely to visit Canada for a trip of one to three nights, or a trip of four nights or more.

6. Competitive Environment

The GTW tracks Key Performance Indicators (KPIs) for Canada in areas such as aided destination awareness, unaided and aided destination consideration, and market penetration. Exhibit 6-1 summarizes the 2015 KPIs for Canada.

Exhibit 6-1 Key Performance Indicators (KPIs) for Canada – Summary

Measure	Definition	All International Travellers	Recent Visitors To Canada[3]	Interested In Canada[4]
		n = 1,488	n = 199	n = 480
Destination awareness:				
Aided awareness of travel opportunities in Canada	% with excellent / very good knowledge of travel opportunities in Canada	44%	81%	74%
Past visitation:				
Overall market penetration	% who have ever visited Canada for pleasure	11%	80%	16%
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[5]	13%	24%	26%
Competitive positioning on destination consideration	Rank on the consideration list relative to competitors (roll-up)	4th	2nd	2nd

Base: International pleasure travellers (n = 1,488)
Aided awareness (Q4) – "How would you rate your level of knowledge of vacation opportunities in each of the following destinations?" (Aided list of Canada plus six pre-defined long-haul competitors).
Market penetration (ever visited) (Q11b) – "Which of the following countries have you ever visited while on a vacation trip?" (Aided list of long-haul destinations).
Unaided destination consideration (Q2) – "Which destinations are you seriously considering for your trips in the next two years?" (Open-ended, coded responses).

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[3] Visited Canada in the past three years for a pleasure trip of four or more nights with one or more nights in paid accommodations.
[4] Definitely interested in visiting Canada in the next two years.
[5] For trips in the next two years.

Since 2012, awareness of travel opportunities in Canada has remained stable, while overall market penetration has increased by +4%. Unaided destination consideration also increased by the same amount (+4%). Importantly, Canada has improved its competitive positioning in relation to other destinations. Canada has risen from 7th among all countries considered to 4th, which further suggests Canada has momentum in the Brazilian market.

Exhibit 6-2 Key Performance Indicators (KPIs) versus 2012

Key Performance Indicator	2012 (n=1,529)	2015 (n=1,488)	YOY Change +/-
Aided awareness of travel opportunities in Canada	44%	44%	0%
Overall market penetration	7%	11%	+4%
Unaided destination consideration	9%	13%	+4%
Competitive positioning on destination consideration	7th	4th	+3

Base: International pleasure travellers

Awareness of travel opportunities

Roughly 2-in-5 Brazilian long-haul travellers consider their knowledge of vacation opportunities in Canada to be 'excellent' or 'very good'. This places Canada in the middle of the pack among the competitive set on this metric. Canada outranks the U.K., Australia and Mexico on this regard, but falls short against the US, Italy and France.

When it comes to awareness of travel opportunities, the US dominates the Brazilian traveller's consciousness. 62% of long-haul travellers are aware of US travel opportunities – a score that is 13 percentage points higher than Italy, which is ranked second in terms of knowledge about vacation opportunities.

Even among those who are definitely or very interested in travelling to Canada, awareness of US travel opportunities is higher than awareness of Canadian opportunities (71% for US versus 61% for Canada). Canada's biggest challenge will be to convince Brazilian travellers to direct some of the attention that is currently reserved for the US towards Canada instead.

Visitation to Canada

Just over one-in-ten (11%) Brazilian long-haul travellers have ever visited Canada. Unsurprisingly, this number is almost double (21%) among those who have friends or relatives in the country. Brazilian males are also significantly more likely to have travelled to Canada than females, possibly a function of a business travel gender skew.

Brazilian travellers continue to show a strong interest in Canada, with 83% indicating that they have some interest in visiting in the next two years. While there is a solid base of good will for

Canada, the ‘top-tier’ destinations in the minds of Brazilians are dominated by the United States, France, and Italy.

In comparison, 89% of Brazilian travellers have some interest in visiting the United States. However, when looking at the more discriminating metric of only those who are ‘definitely’ interested in visiting the stark difference between the United States and Canada becomes much more evident. Almost half (49%) of travellers are definitely interested in visiting the US in the next two years, while 30% of travellers are definitely interested in visiting Canada in the next two years – a 19 point difference. The United States even dominates the other ‘top tier’ destinations on this metric, with France and Italy both scoring 37% (12 points lower than the US). Therefore, it is imperative that any marketing campaigns promoting Canada strongly feature points of differentiation from the US offer.

Advertising recall

Amongst the competitive set, Canada ranks second in terms of advertising recall. 41% of Brazilian long-haul pleasure travellers recall seeing advertising for Canada in the past three months. Those 55 years of age or older were more likely to recall advertising for Canada than their younger counterparts, with 48% awareness (compared to 39% among those 35-54 and 40% awareness among Millennials).

While Canada does rank second in advertising recall, it is a distant second compared to the United States. The US dominates advertising recall, with 72% of Brazilian travellers claiming to have seen or heard advertising for the US in the past 3 months. In addition, the level of recall for US advertising does not differ by age groups.

In Brazil, Destination Canada’s goal is to target a broad range of potential consumers and showcase Canada as a multi-generational destination that offers something for travellers of all ages and life stages. In addition to advertising and social media campaigns, Destination Canada also partners with media for press trips, with the objective of capturing consumer interest with the resulting stories that are published.

While the multi-generational approach is appealing, it is likely too broad to maximize the return on the advertising investment in this market. Those 55 years and older demonstrate the least amount of interest in visiting Canada, but they were disproportionately more aware of Canadian advertising. This means the advertising is currently reaching the most difficult to convert group of consumers. Instead, resources might be directed to targeting more easily convertible groups and communications should promote a more energetic and youthful travel experience.

Exhibit 6-2 Advertising Awareness for Travel Destinations

Advertising Awareness	All International Travellers n = 1,488	Recent Visitors To Canada[6] n = 199	Interested In Canada[7] n = 485
U.S.	72%	69%	72%
Canada	41%	54%	54%
Italy	36%	44%	40%
France	36%	34%	38%
Mexico	31%	30%	33%
Australia	29%	38%	36%
U.K.	23%	31%	30%
None of the above	8%	6%	6%
Don't know	5%	4%	4%

Base: International pleasure travellers (n = 1,488), Recent visitors to Canada (n = 199) and those interested in visiting Canada (n = 485)
QB4: For which of the following travel or holiday destinations have you seen or heard an advertisement and / or a promotional article in the last three months? (Select all that apply)

[6] Visited Canada in the past three years for a pleasure trip of one or more nights with one or more nights in paid accommodations.
[7] Definitely interested in visiting Canada in the next two years.

7. Perceptions of Canada

To be successful, a destination must be perceived as offering value, relevant experiences, and unique tourism opportunities to travellers. To assess value and price perceptions respondents were asked to evaluate Canada relative to competing destinations on a number of attributes.

Value perceptions

Exhibit 7-1 shows Canada's competitive position on a series of value-related attributes. In the Brazil market, Canada ranks in the middle among its competitors on perceptions of value.

When compared to 2012 figures, Canada has not moved the dial on perceptions of value. In contrast, the US has made considerable gains on a couple of key value statements since 2012. Perceptions that the US is *a destination I would pay a little more for* have increased 9 percentage points, and the attribute *a place with unique features that other destinations don't offer* has also improved its standing by 9 percentage points. While Italy and France have maintained their high ranking on value attributes since 2012, the US now joins them as a 'top-tier' destination on the perception of value. This further demonstrates the significant challenge the US poses for Canada as competitive destination in this market.

While Canada has not made improvements on perceptions of value at the 'total traveller' level, an increase in positive perceptions has occurred among Millennials. Of particular importance is a 6 percentage point increase since 2012 on the statement *a destination with the travel experiences I am specifically looking for*. This metric is important because it speaks to personal relevance, which is a key motivator of purchase decisions. Positive momentum for Canada on this indicator reveals that the Millennial segment is likely to be of emerging importance in this market.

Exhibit 7-1 Value perceptions

Value Perceptions	1#	2#	3#	4#	5#	6#	7#
A destination with the travel experiences I am specifically looking for	ITA 64%	USA 63%	FRA 59%	CAN 52%	UK 48%	AUS 47%	MEX 40%
A place with unique features that other destinations don't offer	ITA 70%	FRA 69%	USA 65%	AUS 63%	CAN 57%	UK 54%	MEX 47%
A dream destination that I would visit if money were no object	ITA 68%	FRA 66%	USA 64%	CAN 55%	AUS 54%	UK 51%	MEX 38%
A destination I would pay a little more for	FRA 55%	ITA 55%	USA 55%	CAN 46%	UK 44%	AUS 42%	MEX 32%

Base: International pleasure travellers (n = 1,488)
Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?
Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, and a 1 to 10 scales of agreement with each statement.

In 2015, average value perceptions for Canada remained stable, similar to most competitors except the US which saw a modest gain.

Exhibit 7-2 Year-on-year change in average rating for value attributes

Value	2012	2015	2012/2015 YOY change
Italy	7.9	7.8	-0.1
France	7.7	7.7	±0.0
Australia	7.3	7.1	-0.2
US	7.1	7.5	+0.4
UK	7.0	7.0	±0.0
Canada	7.0	7.1	+0.1
Mexico	6.5	6.2	-0.3

Base: International pleasure travellers (n = 1,488)
Note: Average ratings for all *value* attributes, based on a ten-point scale on agreement with the statements presented to them.

Price perceptions

While Canada has remained stable on metrics related to value since 2012, there has been improvement on perceptions related to price. Canada's average price perceptions have increased on all individual attributes, and its standing in relation to the competition on *air affordability* and *reasonable prices* has risen from 5th to 4th position. Canada's strongest improvement is on *offering good value for the money*, where it rose from 5th to 3rd position. The likely persistence of a significant currency exchange rate gap versus the US means that their improvement will probably be sustained, if not extended further in the next year or two.

Exhibit 7-3 Price perceptions

Price Perceptions	1#	2#	3#	4#	5#	6#	7#
A destination that is affordable to get to by air	USA 56%	ITA 48%	MEX 45%	CAN 44%	FRA 43%	UK 37%	AUS 36%
A destination with reasonable prices for food, entertainment and accommodation	USA 59%	ITA 48%	MEX 47%	CAN 47%	FRA 45%	AUS 37%	UK 34%
A place that offers good value for money	USA 58%	ITA 54%	CAN 49%	MEX 47%	FRA 47%	UK 39%	AUS 38%

Base: International pleasure travellers (n = 1,488)
Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?
Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, and a 1 to 10 scales of agreement with each statement.

Exhibit 7-4 Year-on-year change in average rating for price attributes

Price	2012	2015	2012/2015 YOY change
Italy	7.2	7.2	±0.0
France	6.7	6.8	+0.1
Australia	6.6	6.4	-0.2
US	7.1	7.4	+0.3
UK	6.2	6.2	±0.0
Canada	6.7	6.9	+0.2
Mexico	7.1	6.8	-0.3

Base: International pleasure travellers (n = 1,488)
Note: Average ratings for all *price* attributes, based on a ten-point scale on agreement with the statements presented to them.

8. Trip Profiles

Most recent destination visited

Exhibit 8.1 provides a list of the top-ten destinations visited by Brazilian long-haul travellers on their most recent trip. The US is the top visited destination and accounts for 44% of the long-haul travel market. Given the geographical closeness of the US and Brazil, it is no surprise that Brazilians visit the US at four times the rate of their second and third destinations of choice – France (11%) and Italy (11%).

Canada does not place in the top-ten of recent destinations visited by Brazilian long-haul travellers. In 2015, only 1% of Brazilians visited Canada on their most recent trip.

Exhibit 8.1 – Top-ten destinations visited on most recent trip

	All International Travellers	Recent Visitors To Canada[8]	Interested In Canada[9]
Most Recent Destination Visited	n = 1,488	n = 199	n = 356
United States (Excluding Hawaii)	44%	42%	44%
France	11%	11%	11%
Italy	11%	11%	13%
Portugal	10%	11%	11%
Spain	8%	8%	7%
United Kingdom	7%	9%	7%
Germany	7%	9%	7%
Mexico	6%	6%	8%
Caribbean	6%	4%	6%
Central America	5%	1%	4%
Canada	1%	54%	1%

Base: Those who have taken an international pleasure trip in the past three years
Q27: Which of these destinations did you spend the most time in?

[8]Visited Canada in the past three years for a pleasure trip of one or more nights with one or more nights in paid accommodations.
[9] Definitely interested in visiting Canada in the next two years. Data represents destination of most recent trip, not all trips within the past 3 years. Thus, the percentage for Canada will not be 100%

Type of vacation taken

When travelling abroad, Brazilians prefer touring and city vacations. This aligns well with Canada's Unique Selling Proposition (USP) of 'vibrant cities on the edge of nature'. Given that Brazilians choose touring vacations the most (29%), and city vacations second (19%), this USP illustrates Canada as an ideal destination where Brazilians can enjoy a healthy balance of urban experiences in addition to exploring the more nature/rural areas that surround large urban centers. Beyond touring and city vacations, Brazilians also visited *friends and relatives* (11%), stayed in *resorts* (6%), and *combined business and leisure* (5%) during their most recent qualifying vacation.

Overall, demographic factors do not strongly influence the type of vacation taken by Brazilian long-haul travellers. A few notable exceptions occur with older travellers (55+) who tend to visit friends and relatives at a higher rate as compared to younger Brazilians. City vacations are more likely to be chosen by those with higher incomes.

Exhibit 8-2 Most recent trip: Type of Vacation Take (Top-five)

Type of Vacation	All International Travellers	Recent Visitors To Canada[10]	Interested In Canada[11]
	n = 949	n = 199	n = 356
Touring Vacation	29%	29%	30%
City Vacation	19%	19%	18%
Visit To Friends Or Relatives	11%	14%	8%
Resort Vacation	6%	2%	8%
Combined Business And Leisure Vacation	5%	7%	6%

Base: Those who have taken an international pleasure trip in the past three years
QPT1: Which of the following best-describes your most recent vacation to [destination]?

[10] Visited Canada in the past three years for a pleasure trip of one or more nights with one or more nights in paid accommodations.
[11] Definitely interested in visiting Canada in the next two years. Data represents destination of most recent trip, not all trips within the past 3 years. Thus, the percentage for Canada will not be 100%.

Activities participated in

During their last vacations, Brazilian travellers preferred activities that offered guided experiences. Brazilians participated in guided tours – both in the city (49%) and beyond the city (27%) – the most. This finding provides further support of the relevance of the *vibrant cities on the edge of nature* USP to Brazilian travellers.

Other top-ten activities chosen by Brazilian travellers include: hiking (15%), cycling/biking (11%), and flightseeing (10%). While these activities are chosen less frequently than guided tours/excursions, they point to opportunities to promote another Canadian USP – personal journeys by land, water and air. Brazilians are open to participating in physical activities. Therefore, messaging targeted towards the Brazilian traveller should clearly highlight the ample opportunities for Brazilians to enjoy the Canadian outdoors.

Brazilians travellers also have an affinity towards viewing wildlife (11%) and marine life (11%) on their travels. Based on these activities, the following USP can be leveraged when marketing Canada to the Brazilian long-haul travel market: *Active adventure among awe-inspiring natural wonders*. This USP will appeal to the Brazilian traveller who is interested in viewing a natural environment that is fundamentally distinct from their own.

The top-ten activities that interest Brazilian travellers remain consistent across different demographics. Differences between younger and older travellers are found when considering the level or physical activity associated with each type of activity. Not surprisingly, younger travellers have a stronger affinity towards the following active outdoor pursuits: cycling, fishing, scuba diving and camping. Older travellers prefer a more curated experience as they have a stronger preference toward guided tours.

Exhibit 8-3 Most recent trip: Activities participated in (Top-ten)

Activity Participated In	All International Travellers n = 949	Recent Visitors To Canada[12] n = 199	Interested In Canada[13] n = 356
Guided City Tour	49%	46%	47%
Guided Excursion Beyond The City	27%	32%	34%
Hiking	15%	28%	18%
Cycling Or Biking	11%	16%	16%
Day Cruise	11%	11%	12%
Marine Life Viewing (Whale Watching Or Other Sea Life)	11%	10%	10%
Wildlife Viewing	11%	15%	14%
Flightseeing (By Plane Or Helicopter)	10%	16%	11%
Snowshoeing Or Cross-Country Skiing	10%	21%	14%
Camping	8%	12%	12%

Base: Those who have taken an international pleasure trip in the past 3 years
QPT2: Did you participate in any of the following activities during your last vacation? Please select all that apply.

[12] Visited Canada in the past three years for a pleasure trip of one or more nights with one or more nights in paid accommodations.
[13] Definitely interested in visiting Canada in the next two years. Data represents destination of most recent trip, not all trips within the past 3 years. Thus, the percentage for Canada will not be 100%.

Attractions

Brazilian travellers are interested in many different attractions. No single attraction has an overwhelming appeal to Brazilian travellers. The top five most visited attractions are museums (55%), city parks (54%), historic sites (45%), and art galleries (38%) and amusement or theme parks (33%). These results suggest that the Brazilian long-haul traveller is interested in a wide variety of attractions based on a wide set of interests.

Exhibit 8-4 Most recent trip: Places visited (Top-ten)

	All International Travellers	Recent Visitors To Canada[14]	Interested In Canada[15]
Places Visited on Vacation	n = 949	n = 199	n = 356
Museum	55%	52%	56%
City Park	54%	51%	56%
Historic Site Or Building	45%	36%	45%
Art Gallery	38%	46%	46%
Amusement Or Theme Park	33%	35%	39%
World Heritage Site	33%	34%	38%
National Or State Park	32%	47%	39%
Botanical Garden	23%	37%	30%
Casino	21%	21%	24%
Winery	17%	21%	24%

Base: Those who have taken an international pleasure trip in the past 3 years.
QPT3: Did you visit any of the following types of places during your last holiday? Please select all that apply.
Note: New question added for 2014.

[14] Visited Canada in the past three years for a pleasure trip of one or more nights with one or more nights in paid accommodations.
[15] Definitely interested in visiting Canada in the next two years. Data represents destination of most recent trip, not all trips within the past 3 years. Thus, the percentage for Canada will not be 100%.

Vacation experiences

Culinary experiences represent the first and second chosen experiences for Brazilian travellers. Local cuisine tops the list (63%) and dining at a highly-regarded restaurant follows closely (53%).

Brazilian long-haul travellers also choose experiences that offer information on a destination's aboriginal people. Among recent visitors to Canada and those with an interest in visiting Canada, about 2-in-5 have taken a tour to specifically learn about aboriginal history. The desire of Brazilian travellers to educate themselves on local culture and people creates an opportunity for Canada to differentiate itself from the competitive set.

When travelling abroad, almost 40% of Brazilians will secure their own transportation in the form of a rental car. This suggests that Brazilians value their independence when travelling within a destination and as such are willing to pay for their own transportation. Brazilian travellers that are most likely to rent a car come from higher income households with children and are in the 35-54 year old age group. The availability of independent touring itineraries might be especially appealing to this group.

Exhibit 8-5 Most recent trip: Experiences

	All International Travellers	Recent Visitors To Canada	Interested In Canada
Experience	n = 949	n = 199	n = 356
Tried local cuisine	63%	59%	63%
Dined at a highly-regarded restaurant	53%	57%	55%
Took a tour or visited a museum to learn about aboriginal people	41%	40%	43%
Rented a car	39%	42%	41%
Attended a live show (e.g. comedy musical or theatre show)	33%	27%	34%
Participated in a guided tour by train	21%	25%	28%
Attended a music festival	19%	19%	25%
Tried agri-tourism (e.g. visited a farm)	12%	19%	19%
Visited a spa or wellness centre	12%	19%	17%
Northern (or southern) lights	9%	15%	13%
None of the above	3%	2%	3%

Base: Those who have taken an international pleasure trip in the past 3 years.
QPT4: Did you see or experience any of the following during your last holiday? Please select all that apply.

Type of accommodation

Brazilian long-haul travellers stay in mid-priced hotel/motels nearly twice as often as they stay with their friends and family.

Brazilian long-haul travellers stayed in a variety of accommodation on their last trip with mid-priced hotel/motels at the top of the list (40%). Other accommodations used include luxury, resort and budget hotels (20% each) and staying at the home of friends/relatives (19%).

Among those interested in Canada, 44% chose a mid-priced hotel to stay in. Given the preference of Brazilian long-haul travellers to take guided tours, book rental cars and use hotels, a strategy that offers pre-packaged tours, accommodation and transportation may have strong appeal to Brazilian travellers.

Exhibit 8.6 – Type of Accommodation Stayed-in

	All International Travellers	Recent Visitors To Canada[16]	Interested In Canada[17]
Accommodation	n = 949	n = 199	n = 356
Mid-priced hotel / motel	40%	33%	44%
Luxury urban hotel	20%	28%	23%
Resort hotel	20%	24%	22%
Budget hotel / motel	20%	17%	22%
Home of friends or relatives	19%	22%	18%
Rented house apartment or condominium	12%	11%	14%
Own cottage or second home	6%	6%	11%
Hostel university or school dormitory	6%	10%	8%
Camping or trailer park	4%	6%	6%
Other	1%	0%	1%

Base: Those who have taken an international pleasure trip in the past three years.
QPT5: Which type of accommodation dud you stay in? Please select all that apply.

Travel party

When travelling internationally, Brazilians are most likely to travel with a spouse or partner (63%). Only 11% of Brazilian long-haul travellers visit a destination alone. Brazilian solo travel is more likely to occur among males than females.

[16] Visited Canada in the past three years for a pleasure trip of one or more nights with one or more nights in paid accommodations.
[17] Definitely interested in visiting Canada in the next two years. Data represents destination of most recent trip, not all trips within the past 3 years. Thus, the percentage for Canada will not be 100%.

Booking travel

When making arrangements for long-haul travel, 56% of Brazilians book their flights directly with the airline, and 40% book flights on the internet thorough a travel agency or online retailer. When making arrangements for accommodations, 36% of Brazilians will make reservations through an online travel agency or booking service, and 26% book directly with the hotel/lodging establishment. Only 10% use a travel agent to secure their accommodations.

However, travel agents continue to play a role in terms of how Brazilian travellers learn about and choose the destination they plan to visit. Close to 1-in 5 (19%) of travellers used an agent to gather information about their destination, but in the end, made flight and accommodation reservations on their own. Roughly a third (31%) of Brazilian long-haul travellers did not use a travel agent for information or booking assistance. This suggests the emergence of a narrower, but important role for brick and mortar travel agencies in Brazil. They are increasingly playing the role of trusted sources of information and expertise among those who are undecided or unknowledgeable when it comes to choosing potential ‘new’ destinations such as Canada. They can forcefully direct decision-making in such cases. As a consequence, Destination Canada should continue to place focus on equipping Brazilian travel agents to play the role of Canada gatekeeper.

9. Attraction of Canada

Most appealing aspects of a trip to Canada

While there are a variety of features that excite the Brazilian long-haul traveller about Canada, there are two key aspects in particular that stand out. As is the case in many countries, experiencing Canada's nature and scenery is an alluring thought for Brazilians. More interesting, however, is that Canada's atmosphere is nearly as appealing as its nature.

Marketing efforts should highlight that Canada offers natural beauty and a great atmosphere, which further suggests that Destination Canada's USP of *vibrant cities on the edge of nature* should be incorporated into future campaigns.

Exhibit 9-1 What intrigues or excites you most about a potential trip to Canada? – Top-ten mentions by Brazilian travellers

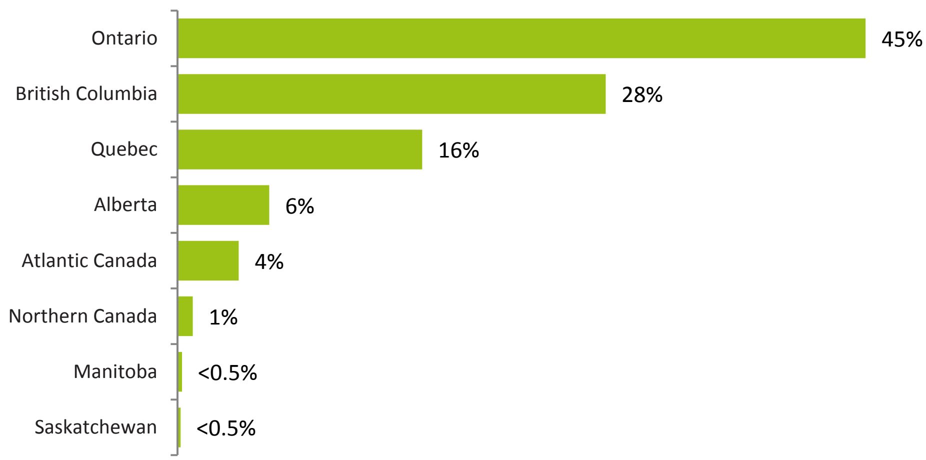
Base: Respondents considering a trip to Canada (n = 803)
QTI1: "What intrigues or excites you most about a potential visit to Canada?"
Note: New question for 2014
Note: Open-ended question – results shown are the coded (grouped) responses

Canadian regions of interest

Brazilian long-haul travellers who are likely to visit in the next two years expressed interest in multiple Canadian destinations. Ontario dominates as a region of interest with almost half of respondents choosing somewhere within Ontario as their most likely destination. Within Ontario, Toronto and Niagara Falls are the cities of most interest.

At 28%, British Columbia is the second most popular potential destination. British Columbia is, however, of amplified interest to Millennials, possible in keeping with the allure of active outdoors.

Exhibit 9-2 Region likely to visit in Canada



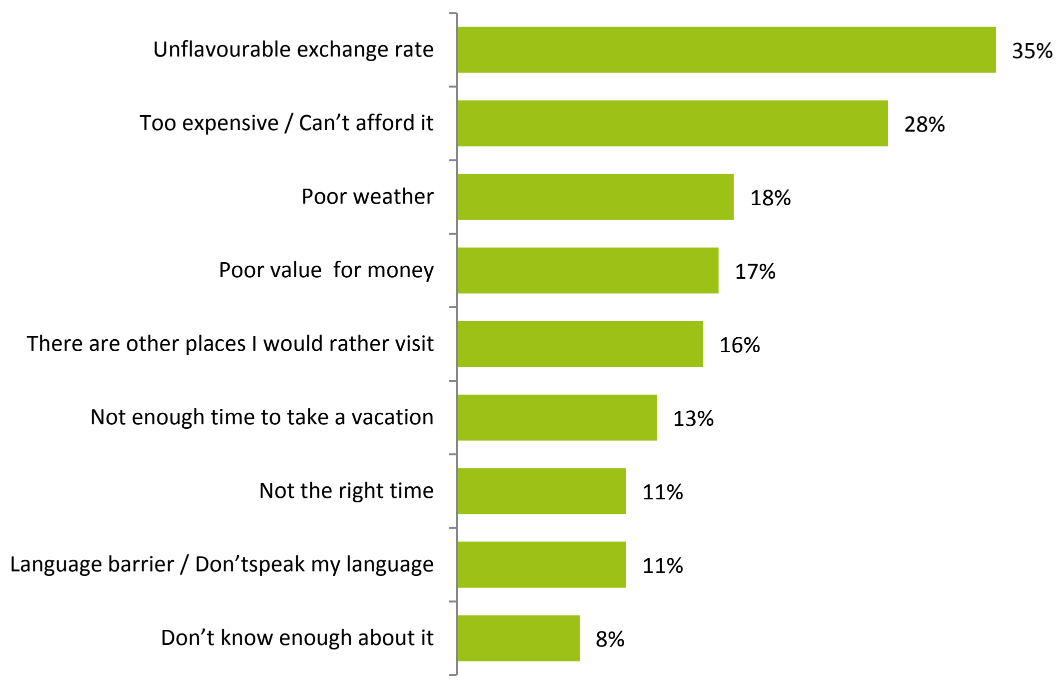
Base: Q16 Those likely to visit Canada in the next 2 years and / or those who are considering, have decided to visit or have booked a trip there, Q17 Long-haul pleasure travellers with an interest in visiting Canada (n = 1,143)
Q17: "And, which region of Canada would you be most likely to visit?"

10. Barriers to Visiting Canada

When it comes to visiting Canada, there are a number of barriers for the Brazilian long-haul traveller. Unfavorable exchange rates (relative to the Real) and perceptions of Canada being too expensive are the most prevalent responses regarding factors that discourages visitation (this could moderate under the current currency regime). Secondary barriers include perceptions related to poor weather and poor value for money. Fortunately, these are all barriers that can be addressed through marketing communications.

Generally speaking, barriers to visiting Canada tend to be universal with no single group bringing forth a particular barrier more than others. However, there is a notable exception with regards to the barrier of wanting to visit other places instead. A desire to visit other places is much more pronounced among older travellers (55+) than their younger counterparts. This generally signals lack of enthusiasm based on perceptions of the offer's advantage rather than outright rejection.

Exhibit 10-1 Top-ten barriers to visiting Canada



Base: International pleasure travellers considering a trip to Canada (n = 803) QTI3: Which of the following factors might discourage you from visiting Canada?

11. Sources of Information on Canada

Source of awareness

In the past twelve months, Brazilian long-haul travellers considering a trip to Canada have received information about destinations from a variety of sources. Websites are the most common source of information about Canada, followed closely behind by friends and family in person.

Unsurprisingly, older travellers (55+ years of age) were more likely to recall hearing about a Canadian destination from friends and family in person, while younger Canadians were more likely to recall hearing about a Canadian destinations through social networks (43% of travellers ages 18-34 have heard about Canada through a social network versus 25% for those ages 55+).

More surprisingly, is when Brazilian travellers are asked where they have heard about international destinations *in general*, social media is more common among 55+ as a source of the information (42% of travellers ages 55 or order have heard about international destinations through friends and family on a social network versus 28% for those 18-34 years of age). This suggests that there is something distinctly different about how younger travellers are interacting with the Canada brand on social media and provides a compelling rationale for targeting younger travellers in this market.

Most influential sources

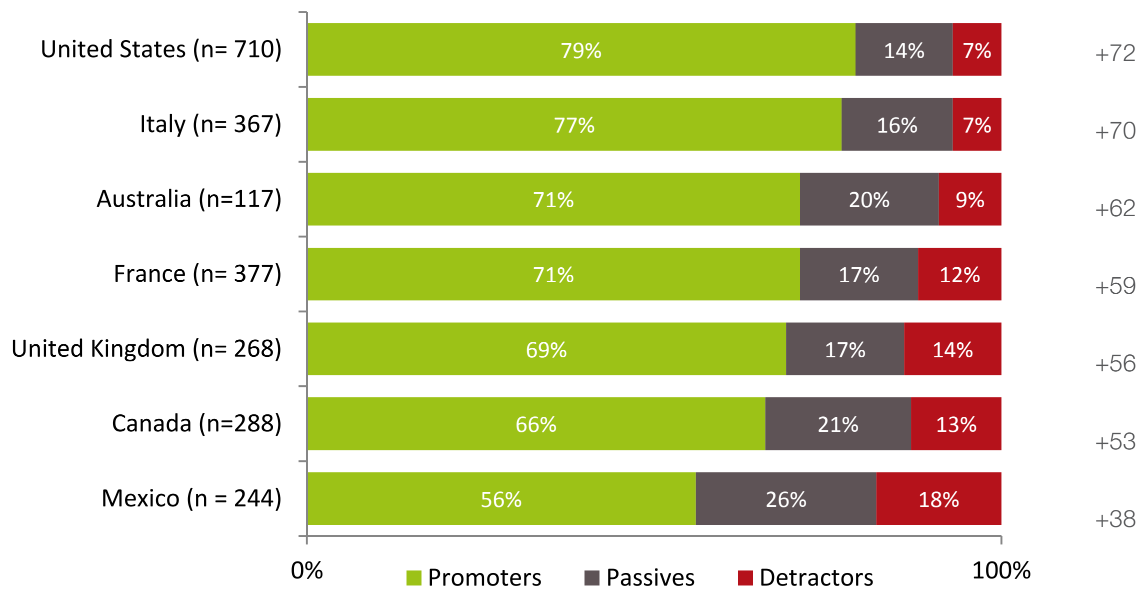
Friends and family, both in-person and on social media, are the most influential sources of information for Brazilian travellers. Nonetheless, Brazilians are also likely to be influenced by the content they encounter on travel review websites. This highlights the importance of reputation management, and Destination Canada should be encouraging all Canadian travel service providers to develop their own clear and focused reputation management strategy.

12. Net Promoter Score (NPS)

The Net Promoter Score (NPS) is an established tool to measure consumers' likelihood to recommend a product or service to friends and family. Data were gathered among all respondents, but results from past visitors to each destination are the most telling and are presented below.

Of the Brazilian long-haul travellers who have ever travelled to Canada, 66 percent would recommend Canada to friends, family and colleagues, while 13 per cent would not – resulting in an NPS score of +53.

Exhibit 12-1 Net Promoter Score (NPS) results (Ever Visited)



Q3: Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
Base for each country is filtered to only those respondents who had actually visited *that* country.
Note: Results ranked in descending order according to the overall NPS score.

Among all Brazilian long-haul travellers, whether they have been to Canada or not, the highest proportion of promotors are found among those who have family or friends in Canada, those from a higher social class (A2), and those who have a strong interest in visiting Canada in the next two years. Those who have taken a trip to Canada in the *past three years* were much more likely to be a promotor than those who have *ever* taken a trip to Canada (84% versus 66%) suggesting that recency is a key factor to advocacy.

Canada's Net Promotor Score for 2015 has decreased six points since 2012 from a score of +59 to its current score of +53. In contrast, the United States also had a Net Promotor Score of +59 in 2012, but in 2015 their score has increased by thirteen points to +72. As a result, the US is currently ranked first out of all the competitive destinations on the NPS metric.

Brand USA was officially launched in the Brazilian market in 2013, and it is clear from the results of this study that it has been a successful initiative. Destination Canada's biggest challenge will be to learn from the USA strategy, so that Canada can put forth an offer in the Brazilian market that is unmistakably differentiated from that of the United States. Otherwise, Canada risks being overshadowed and lost in the advertising noise of its competitors.

13. Path to purchase

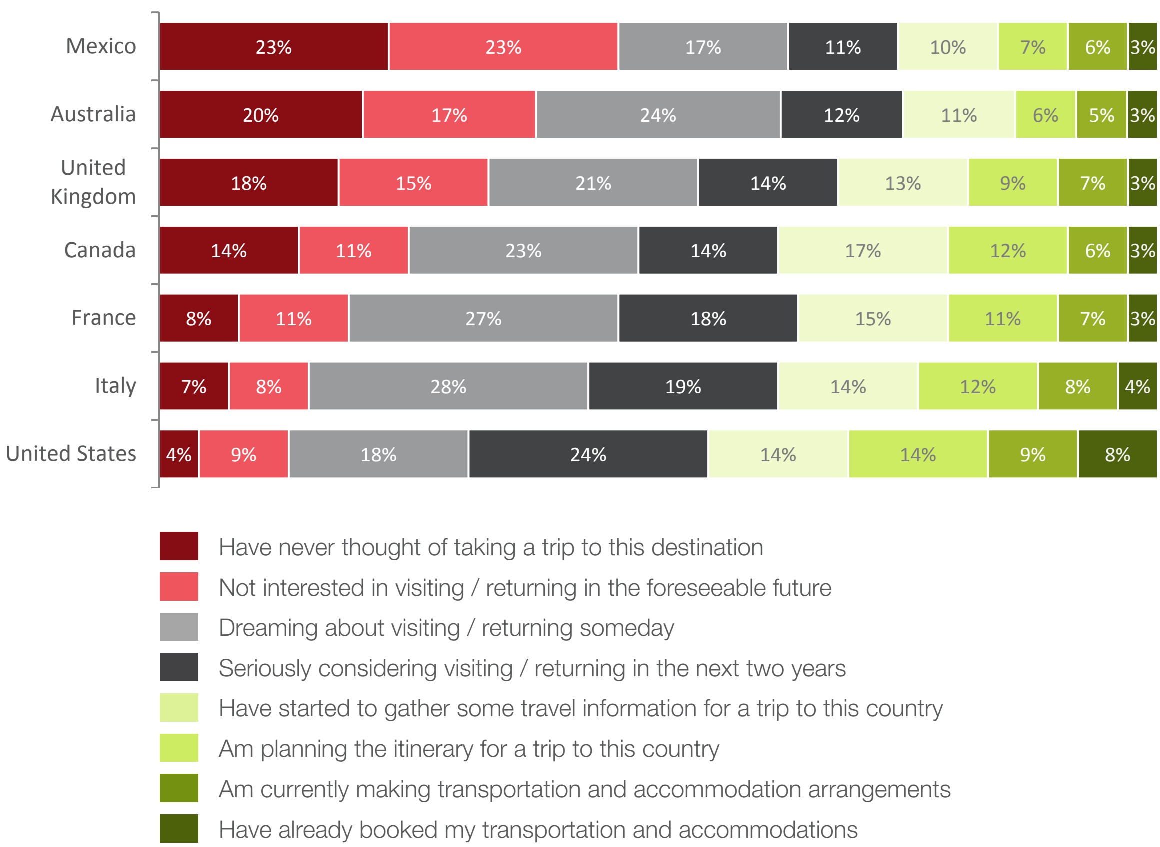
Like any other expensive and discretionary consumer product, there is a purchasing or decision-making cycle associated with travel: consumers move through various stages from not knowing anything about a destination to actually booking a trip.

Through additional research, Destination Canada has developed a Path to Purchase (P2P) model for long-haul travel and has identified where the organization can have the greatest influence in converting those with potential interest in Canada to actual visitors.

These include the consideration, evaluation and purchase stages of the P2P cycle, starting with awareness of the opportunity and interest in a destination, through to booking one's itinerary, travel and accommodations.

Exhibit 13-1 shows the percentage of Brazilian long-haul travellers at each stage of the P2P, for both Canada and the competitive set of long-haul destinations.

Exhibit 13-1 Stage in the path-to-purchase



Base: International pleasure travellers (n = 1,488).
Q6: Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?
Note: Results ranked in descending order according to the number of travellers who: *are planning the itinerary for their trip, making transportation and / or accommodation arrangements for their trip,* or *have already booked transportation and accommodations*.

38% of Brazilian long-haul pleasure travellers are either in the *evaluation* or *purchase* stage for a trip to Canada, which is 10% higher than it was in 2012. Of particular importance is that the proportion of travellers who are specifically in the *purchase* stage has doubled from 5% to 10% since this data point was last collected in 2012. This provides further evidence that momentum does exist for Canada in this market. While the United States is a formidable competitor in the Brazilian market, there is undoubtedly substantial opportunity for Canada to grow its share of inbound travellers from a relatively small base.

In order to understand the potential drivers that are motivating Brazilians to take a trip to Canada, it is important to look at what activities individuals are participating in on their trips in general. This analysis uncovers insight into the type of travellers that are attracted to Canada. Those who are in the *purchase* stage of a trip to Canada over-index on participation in hiking, cycling, fishing, hunting, golfing, skiing/snowboarding, flightseeing and day cruises. This list of activities reveal two key themes about those who have purchased a trip to Canada: 1) they have an interest in soft adventure, and 2) they are seeking personal journeys by land, water and air, which is one of Destination Canada's five Unique Selling Propositions. These are the building blocks that Destination Canada now needs to use to construct its offer. While it is important to promote these types of activities in communications efforts, it is absolutely imperative that Destination Canada does so within the context of presenting Canada as a destination that has a distinct sense of place. That is the backdrop that will give life to these activities in advertising creatives and journalism partnerships.

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