



Canadian Tourism  
Commission

Commission canadienne  
du tourisme

# Global Tourism Watch

## Mexico Summary Report - 2011



Canada





# Table of Contents

---

1. Research Objectives .....	1
2. Methodology.....	1
3. Market Outlook and Potential.....	1
4. Unaided Destination Awareness.....	3
5. Canada’s Value & Price Perceptions .....	5
6. Product Interest .....	7
7. Competitive Product Positioning .....	9
8. Sources of Information on Canada.....	11
9. Key Barriers for Travel to Canada.....	12
10. Conclusions: Key Take-Aways.....	14



## 1. Research Objectives

The Canadian Tourism Commission initiated a Global Tourism Watch (GTW) program in 2007 to expand the consumer-based intelligence in its key markets; the Canadian domestic market was later introduced in 2009. In 2011, India and Brazil were added to the study. The overall objectives of the GTW study are:

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

## 2. Methodology

The target population for the online survey was residents aged 18 and older, who had taken a pleasure trip in the past three years where they stayed at least four or more nights with at least one night in paid accommodations or plan to take such a trip in the next two years. Trips had to be outside of Mexico and Central America.

Pleasure trips included vacation or holiday trips, trips to visit friends and relatives, and combined business-pleasure trips. In Mexico, the target was n=1,500 long-haul pleasure travellers, with a quota of n=200 recent travellers to Canada. The sample was restricted to the three largest cities where most long-haul travellers reside – Mexico City, Guadalajara and Monterrey – with about half of the interviews conducted in Mexico City. The survey was conducted in July 2011.

## 3. Market Outlook and Potential

Aside from a recession-induced low in 2009, the importance of long-haul travel for Mexicans has generally remained between 82% and 84% over the last five years, and currently sits at the low end of that range.

Results for the market outlook indicator (percentage difference between “will travel more” and “will travel less” in the next 3 years vs. the last 3 years) are fairly optimistic, with this measure tracking steadily upward from a low of +29 in 2009 to +34 in 2011. However, this figure still falls short of the baseline value (+37), pointing to some lingering trepidation in the long-haul marketplace.

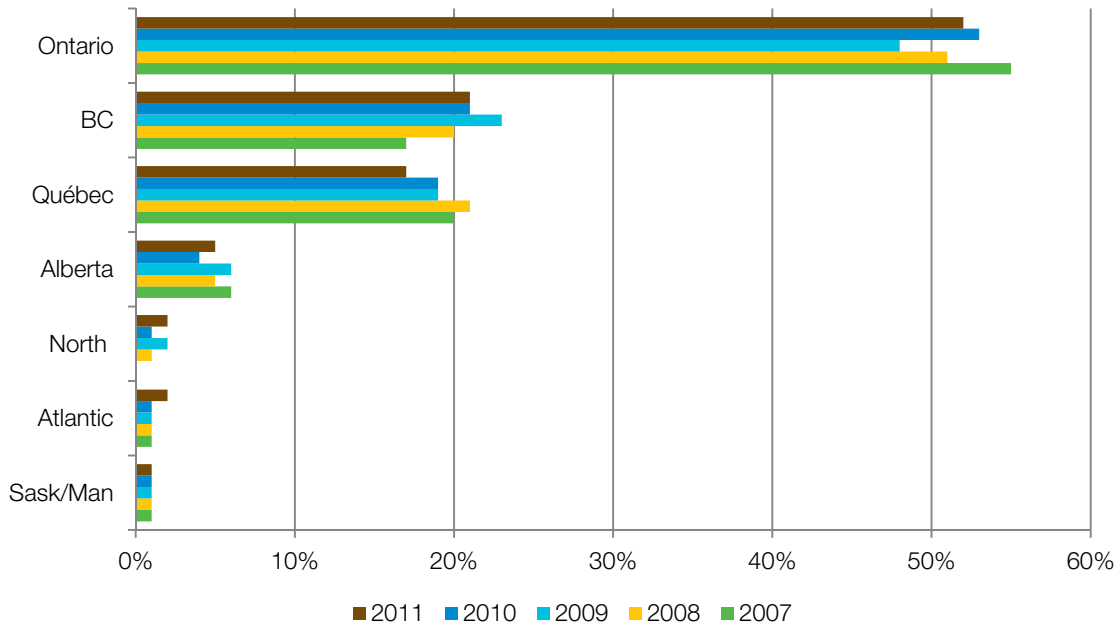
These results closely mirror consumer confidence trends in Mexico over the last few years, with market sentiments brightening since late 2009 to hit a three-year high in July 2011 when the GTW was fielded. Even so, this peak is below pre-recession levels, indicating that market sentiments in Mexico remain on shaky ground. In fact, since the survey was conducted, consumer confidence has been erratic, with sharp declines seen for four consecutive months

due to heightened concerns about the US economy and the euro-zone crisis, before improving in 2012.

After eroding steadily between 2007 and 2010, travel intentions appear to be on the road to recovery at 49%, particularly shorter getaways of 1 to 3 nights (44%). This may be partly due to the shift in the market composition to more avid travellers, coupled with the gains in the peso in the first part of 2011.

As shown in [Exhibit 3.1](#), the region that Mexican travellers are most likely to visit has shown little change over the years. Ontario continues to be the pivotal destination in this market, mentioned by over half of all travellers. British Columbia is a distant second to Ontario at just over 20%. Although its popularity has waned over the past few years, Québec continues to pull up in third spot at 17%. Alberta is the destination of choice for about 5%, with all of the other regions continuing to register at only 1% to 2%.

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



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

**Exhibit 3.2** shows the immediate potential for the regional partners on the GTW study based on current levels of interest. The best potential is for Ontario and British Columbia (both at close to 1.8 million travelers each), followed by Québec (at almost 1.7 million) and Alberta (at over 1.3 million).

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

	CDA	ON	BC	QC	AB	YK	NU
<b>Immediate Interest<sup>1</sup></b>	49%	92%	92%	87%	69%	30%	15%
<b>Potential (M)<sup>2</sup></b>	1.9	1.8	1.8	1.7	1.3	0.6	0.3

Base: Long-haul pleasure travellers (n=1,542)

<sup>1</sup> Base for percentages is those likely to visit Canada in the next 2 years and/or those who are considering, have decided to visit or have booked a trip there.(n=1,249)

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

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

## 4. Unaided Destination Awareness

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

The introduction of visa requirements for Mexican visitors in the summer of 2009 led to an almost immediate plunge in arrivals to Canada. Not surprisingly, awareness also dropped that year (from 35% to 30%), rallying briefly in 2010 (likely because of the Olympic Games), before falling to a low of 29% in 2011.

However, Canada is not alone in terms of its diminishing awareness. Australia, China and Egypt have all been losing popularity since 2008, falling to a low of 7% to 8% in 2011. Moreover, several of the European destinations (e.g., Spain, France, Greece [6%]) are at or near record lows.

On the other hand, one of the most striking trends to emerge in 2011 is a distinctive surge in the popularity of South American vacation spots among Mexican travellers. Brazil, Argentina, Chile and Peru have all enjoyed gains of 3 to 5 ppt since 2010, with all but Argentina hitting record highs in 2011. Both Brazil (23%) and Argentina (23%) have earned a position among the top ten destinations and are poised to move into the top three if current trends continue. South America's recent popularity gains are being driven by improved air access, bargain-basement prices and deepening trade agreements with Mexico, along with shared historical, cultural and linguistic ties. Peru (19%) is also enjoying the benefits of having lifted visa requirements for Mexican travellers in 2009.

**Exhibit 4.1 Unaided Destination Awareness**

(showing top 5 countries only)

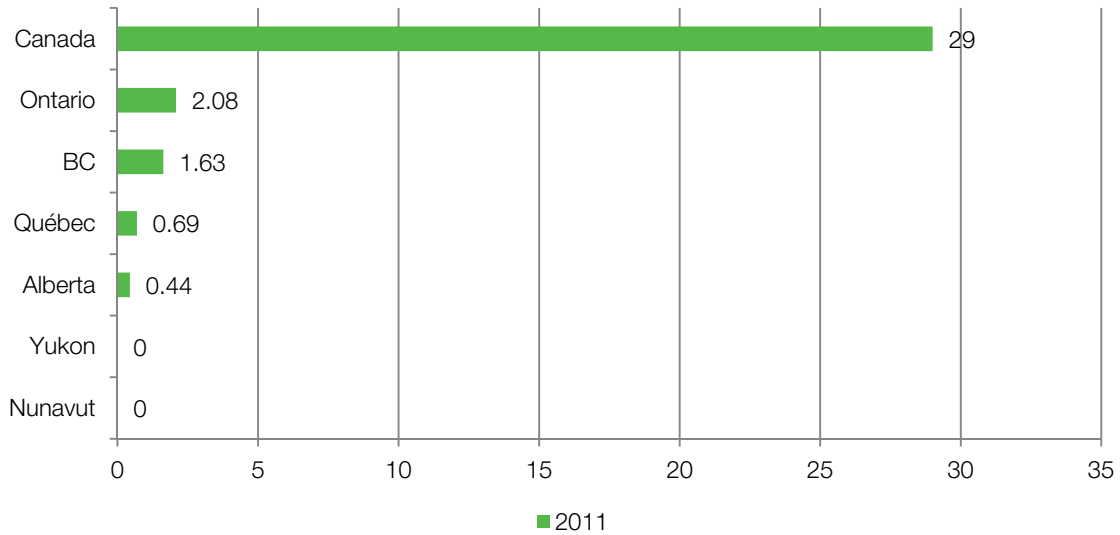
	2007	2008	2009	2010	2011
<b>1. US</b>	38%	37%	34%	35%	35%
<b>2. Canada</b>	31%	35%	30%	33%	29%
<b>3. France</b>	27%	29%	23%	26%	24%
<b>4. Spain</b>	29%	27%	24%	26%	24%
<b>5. Italy</b>	20%	23%	24%	21%	23%

Base : Long-haul pleasure travellers (2011 n=1,542)

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

**Exhibit 4.2** shows that individual destinations in Canada contribute four percentage points to the total unaided awareness score of 29% for Canada. Among the regional partners, Ontario commands the most attention (driven by “Niagara Falls” and “Toronto”), followed by British Columbia (driven mainly by “Vancouver”). Québec and Alberta are the only other GTW regional partners with any measurable awareness in Mexico, albeit at less than one percent each.

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



*Base: Long-haul pleasure travellers (n=1,542)*

*Note: Only GTW regional partners are included.*



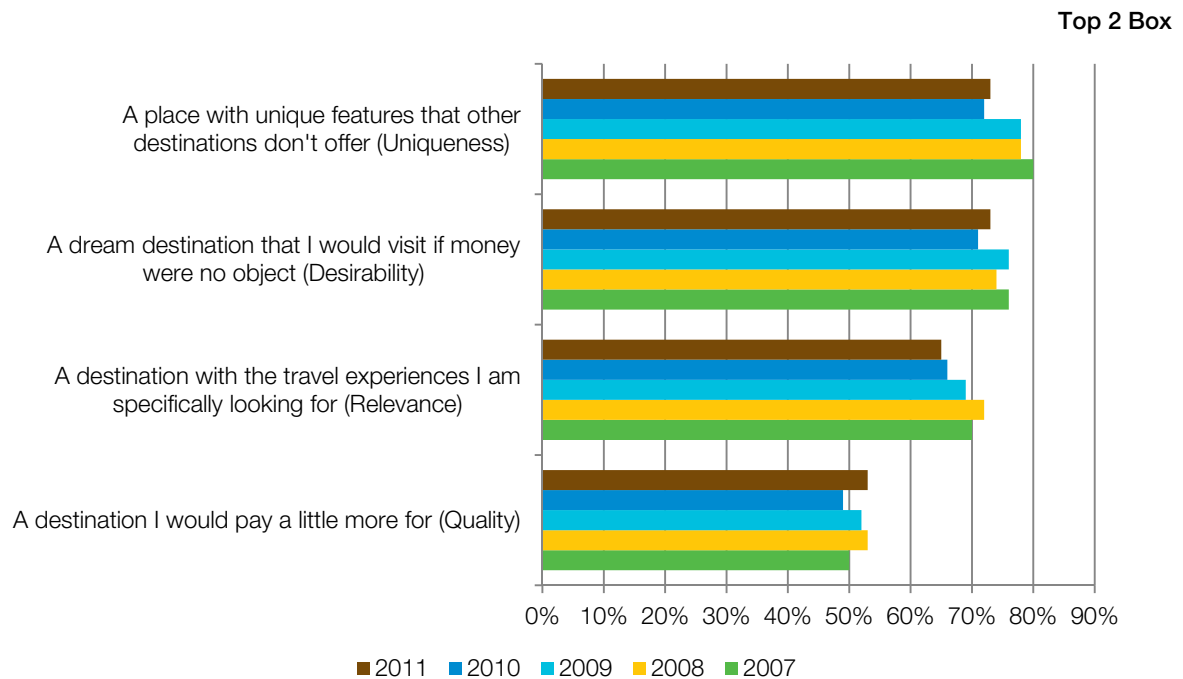
## 5. Canada's Value & Price Perceptions

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

Mexican travellers award the highest scores of any GTW market to each of the individual value attributes, with "Quality" being the only exception. Despite Canada's third place finish behind India and China, the positive results indicate that Canada is ahead of the curve in Mexico in terms of being perceived as having quality travel products and experiences.

"Uniqueness" and "Desirability" both sit at a robust 73%, with the downswing for Uniqueness finally changing direction and Desirability managing to recover some lost ground. Unfortunately, Relevance continues along its downhill trajectory (falling to 65%), but as mentioned, this is still better than Canada's performance in any other GTW market.

**Exhibit 5.1 Value Perceptions**



Base: Long-haul pleasure travellers (2011 n=1,542)

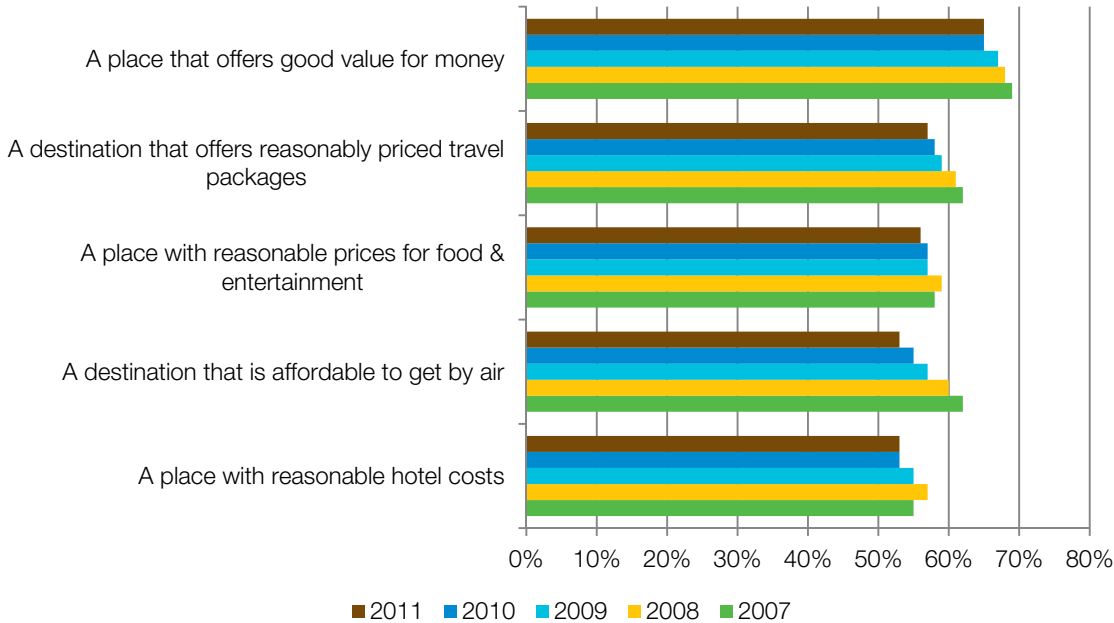
Note: Top 2 Box refers to a rating of 4 or 5 on a 5-point scale where 1 is "Strongly Disagree" and 5 is "Strongly Agree".

In addition to brand image and destination value, cost plays a major role when it comes to destination decision-making. Accordingly, [Exhibit 5.2](#) shows how Canada is perceived by Mexican travellers on various travel cost components.

Mexico emerges among the top three markets on all of the individual cost components. This is despite the fact that perceptions of package costs and airfare have been in a tailspin since 2007, while perceptions of reasonable food and entertainment prices have been trending downward since 2008. Impressions of reasonable hotel costs and value for money have also been eroding, but appear to have stabilized in 2011.

**Exhibit 5.2 Price Perceptions**

**Top 2 Box**



Base: Long-haul pleasure travellers (2011 n=1,542)

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

## 6. Product Interest

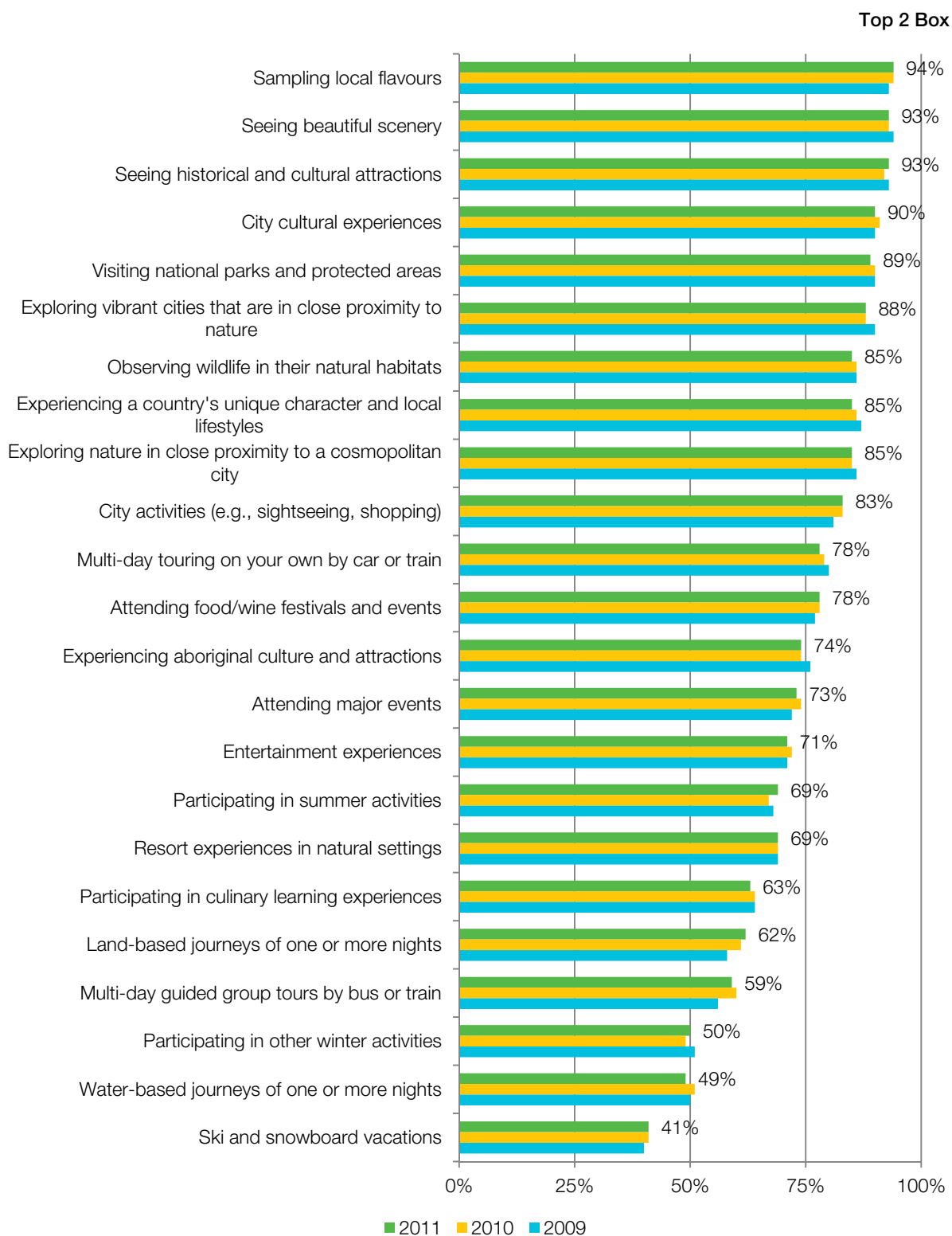
As in many of the newer or emerging markets (e.g., China, India, South Korea), Mexican travellers have very high product interest levels, being keen to try their hand at all manner of activities on their long-haul travels (see [Exhibit 6.1](#)). In fact, there are only a handful of products where Mexico does not emerge as one of the top three GTW markets in terms of enthusiasm.

The other noticeable thing about the exhibit is that interest levels have remained remarkably steady over the last three years. The only significant shift is for land-based journeys, which is seeing a distinctive growth trend. While this is consistent with the soaring interest in adventure travel and outdoor pursuits that is emerging across many of the GTW markets, the other outdoor activities have yet to see the same trend in Mexico.

Given the lack of movement on the product scale, the story is similar to previous years. Mexicans clearly enjoy a good mix of experiences, with nature (e.g., scenery, national parks, wildlife, nature close to cities), culture (e.g., seeing historical/cultural attractions, local flavours, local lifestyles) and cities (e.g., museums/galleries, sightseeing/shopping, cities close to nature) all among the top activities. Self-touring, culinary pursuits and city activities such as events and entertainment are all of moderate appeal for Mexican travellers at this point. However, the Mexican travel industry reports that interest in food and wine-related experiences is starting to heat up, as is the popularity of event-based trips, particularly sports events and music festivals in the US.

As in previous years, outdoor activities continue to be clustered at the bottom of the chart. Guided group tours are there as well, and the fact that the score is almost 20 ppt below that for self-touring underscores the growing independence of Mexican travellers.

### Exhibit 6.1 Product Interests



Base: Long-haul pleasure travellers (2011 n=1,492; 2010 n=1,470; 2009 n=1,484).

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

Results not comparable to previous years due to changes to the product list in 2009.

## 7. Competitive Product Positioning

Canada is well-entrenched in its leadership position on ski vacations and winter activities, with a commanding lead over the US. [Exhibit 7.1](#) provides detailed results showing how Canada ranks against its six competitors on each specific product. It is also the best in its league on scenery and water-based journeys, tied for first place on national parks and in second spot on wildlife. While this points to scenery, nature and the great outdoors as Canada's aces in the Mexican market, an alarming trend is emerging, with Canada down significantly on all four of these products in 2011. Fortunately, Canada has managed to maintain its competitive ranking to date, although if current trends continue, it will soon lose out to the US on national parks and to Brazil on water-based journeys. Clearly, recovering lost ground on its heavy hitters is a key priority for the CTC and its partners. On the bright side, the nature-related hybrid products fare somewhat better, with Canada holding its own on nature close to cities (first) and resorts in natural settings (second).

Canada is on more tenuous ground with respect to some of the other outdoor products, currently sitting in fourth or fifth spot. However, one of these – land-based journeys – offers Canada a growth opportunity. While it is currently embroiled in a four-way battle for the lead against the European destinations, a good push here should easily land it in the top spot. Summer activities also requires some shoring up, with Italy overtaking Canada in 2011 on the back of a significant 4-point gain, dropping Canada into 5th place. Still, Canada is only 11 ppt behind the market leader (Brazil), indicating some opportunity to become as well known in Mexico for summer pursuits as it is for winter ones.

Another danger spot for Canada is with respect to city pursuits. While it is second to Brazil on cities close to nature, it is losing momentum, having softened from 48% to 45% this year. And while far from being a market leader on city activities or major events, its positioning is becoming more precarious with downward pressures on both products. These results are cause for concern, as Canada needs to enrich its image and product portfolio with offerings beyond nature. At this point, city pursuits are the best bet for doing this, given their importance to Mexican travellers and Canada's ability to leverage nature using concept of the cities on the doorstep of nature concept.

While culture is also important to Mexican travellers, aboriginal culture is the only product where Canada is even remotely well-positioned, and even then, it is 44 points behind Brazil, the market leader. However, culture can certainly be used to deepen the brand, add colour to Canada's image and give insights into the destination that go beyond nature.

Culinary products are perhaps the hardest sell for Canada in the Mexican market as Canada is in 6th or 7th spot on all three of these, lagging 50 to 55 ppt behind the market leader.



### Exhibit 7.1 Competitive Positioning

	1	2	3	4	5	6	7
Participating in other winter activities	<b>CAN</b> 75%	USA 54%	FRA 17%	ARG 15%	ITA 12%	ESP 8%	BRZ 4%
Ski and snowboard vacations	<b>CAN</b> 71%	USA 55%	FRA 18%	ARG 17%	ITA 11%	ESP 7%	BRZ 6%
Seeing beautiful scenery	<b>CAN</b> 61%	BRZ 38%	ARG 33%	USA 29%	ITA 19%	FRA 16%	ESP 15%
Water-based journeys of one or more nights	<b>CAN</b> 45%	BRZ 43%	USA 35%	ARG 20%	ITA 15%	ESP 13%	FRA 12%
Exploring nature in close proximity to a cosmopolitan city	<b>CAN</b> 39%	BRZ 38%	USA 30%	FRA 25%	ITA 25%	ESP 23%	ARG 21%
Visiting national parks and protected areas	USA 52%	<b>CAN</b> 52%	BRZ 37%	ARG 22%	ESP 15%	FRA 15%	ITA 13%
Observing wildlife in their natural habitats	BRZ 56%	<b>CAN</b> 49%	USA 35%	ARG 23%	ESP 11%	ITA 11%	FRA 8%
Exploring vibrant cities that are in close proximity to nature	BRZ 54%	<b>CAN</b> 45%	ARG 28%	USA 24%	ESP 20%	ITA 20%	FRA 19%
Resort experiences in natural settings	USA 57%	<b>CAN</b> 38%	BRZ 23%	ESP 20%	ARG 19%	FRA 18%	ITA 17%
Experiencing aboriginal culture and attractions	BRZ 68%	ARG 29%	<b>CAN</b> 24%	USA 18%	ESP 15%	ITA 14%	FRA 10%
Land-based journeys of one or more nights	ITA 35%	ESP 34%	FRA 32%	<b>CAN</b> 32%	BRZ 24%	USA 23%	ARG 21%
Multi-day guided group tours by bus or train	ITA 45%	FRA 45%	ESP 41%	<b>CAN</b> 23%	BRZ 22%	USA 20%	ARG 17%
Multi-day touring on your own by car or train	ITA 46%	FRA 45%	ESP 44%	USA 29%	<b>CAN</b> 26%	ARG 15%	BRZ 14%
Participating in summer activities	BRZ 37%	ESP 35%	USA 32%	ITA 28%	<b>CAN</b> 26%	ARG 23%	FRA 22%
City activities (e.g., sightseeing, shopping)	USA 58%	FRA 45%	ITA 38%	ESP 33%	<b>CAN</b> 22%	ARG 12%	BRZ 11%
Seeing historical and cultural attractions	FRA 63%	ITA 61%	ESP 52%	USA 18%	<b>CAN</b> 13%	BRZ 13%	ARG 12%
City cultural experiences	FRA 65%	ITA 56%	ESP 51%	USA 25%	<b>CAN</b> 13%	ARG 10%	BRZ 10%
Experiencing a country's unique character and local lifestyles	ESP 46%	ITA 43%	BRZ 36%	FRA 29%	ARG 28%	<b>CAN</b> 23%	USA 15%
Attending major events	USA 44%	ESP 37%	FRA 32%	BRZ 29%	ITA 29%	<b>CAN</b> 21%	ARG 16%
Sampling local flavours	ITA 60%	FRA 53%	ESP 45%	ARG 36%	BRZ 27%	<b>CAN</b> 9%	USA 9%
Entertainment experiences	USA 63%	FRA 35%	ESP 32%	BRZ 27%	ITA 23%	ARG 16%	<b>CAN</b> 15%
Participating in culinary learning experiences	FRA 58%	ITA 57%	ESP 46%	ARG 24%	BRZ 14%	USA 10%	<b>CAN</b> 9%
Attending food/wine festivals and events	FRA 64%	ITA 55%	ESP 48%	ARG 27%	BRZ 15%	USA 10%	<b>CAN</b> 9%

Base: Long-haul pleasure travellers (n=1,542).

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

Legend: CAN = Canada, USA = United States, ARG = Argentina, FRA = France, ITA = Italy, ESP = Spain, BRZ = Brazil.

## 8. Sources of Information on Canada

Over 90% of Mexican travelers indicated they saw travel-related information on Canada in the past 3 months, which is the highest of any GTW market, including the domestic one (see [Exhibit 8.1](#)). The fact that Mexican consumers in the three cities are highly attuned to travel information on Canada is a very positive sign, and is consistent with the high penetration rates of Canada's advertising in Mexico relative to other GTW markets.

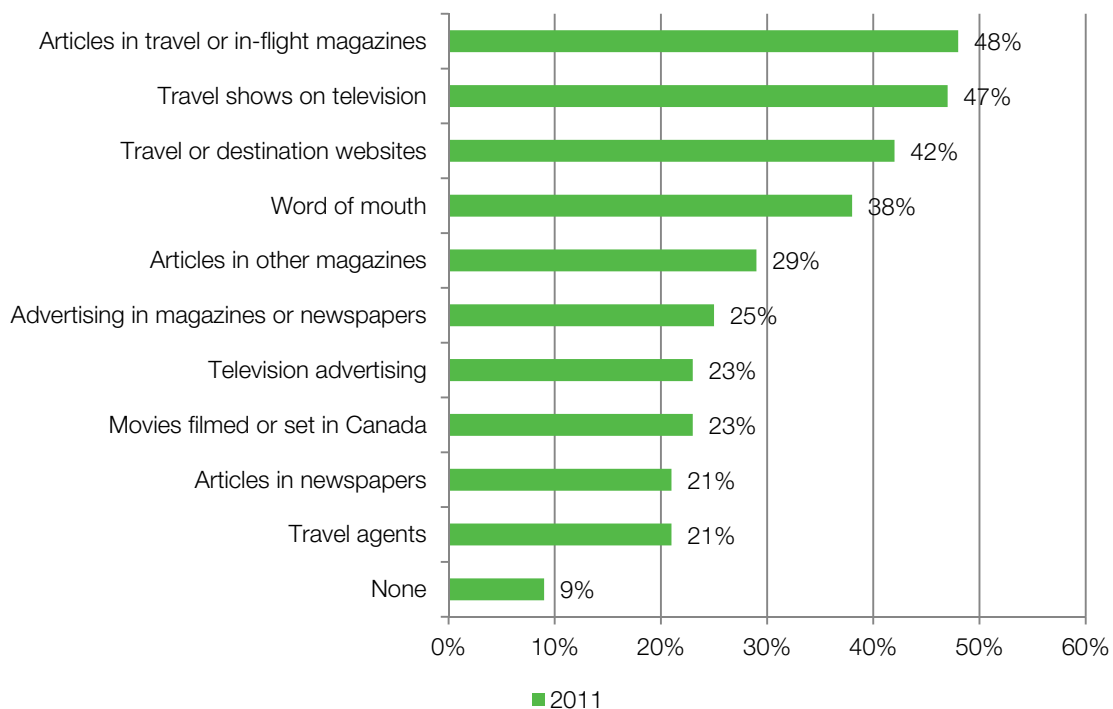
Mexican travellers rely to a large extent on travel-specific media for information on Canada, with articles in travel magazines, television travel shows and travel/destination websites being the top three information sources (all between 40% and 50%). Word of mouth and articles in non-travel magazines round out the top five sources (both in the 30% to 40% range).

Advertising in print media and on television can also be effective ways of reaching Mexican travellers, along with movies filmed/set in Canada. Newspaper articles and travel agents round out the top ten, with all of these sources seen by more than a fifth of the Mexican market.

While online advertising, email newsletters/promotions and social networking websites all fare relatively well (in the 16% to 18% range), most other web-based media emerge in the lower reaches of the chart and are best reserved for highly targeted campaigns.

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

**(List top 10 sources only)**



*Base: Long-haul pleasure travellers (n=1,542)*

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

## 9. Key Barriers for Travel to Canada

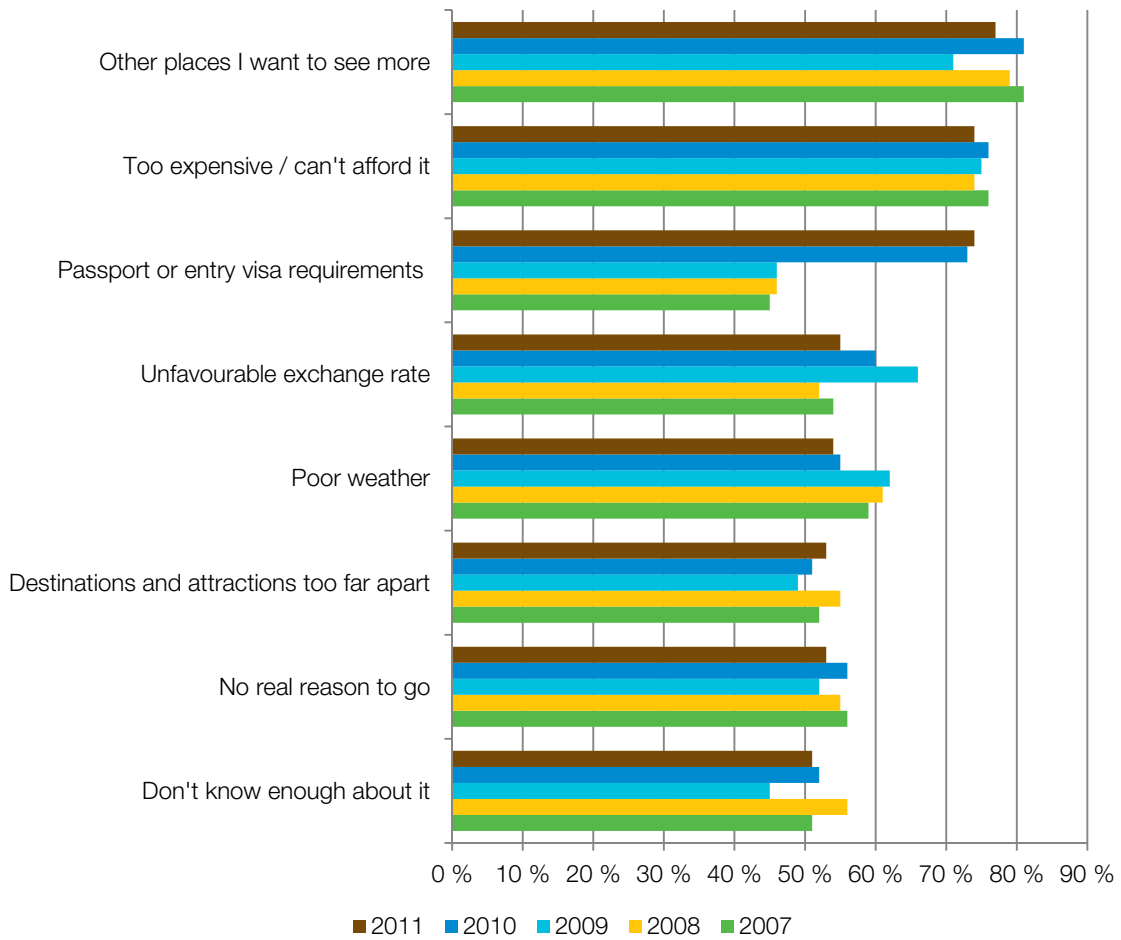
The top barriers for travel to Canada remained the same for the duration of the GTW study, with competition from other destinations (77%) and cost (74%) being the foremost roadblocks ([Exhibit 9.1](#)). While the extent of the threat from other destinations has fluctuated in the 70% to 80% range over the duration of the study, the cost factor has remained remarkably steady, varying by just 2 ppt over the five years.

In mid-2009, Canada introduced visa requirements for Mexican travellers, leading to an abrupt increase for entry issues as a travel barrier the following year (up a remarkable 27 ppt to 73%). This remains a strong deterrent in 2011, with the rating of 74% ranking it third in the list (up from 7th in 2009 and 13th in 2008). It is also telling that only 10% of those who do not plan to take a long-haul trip in the next two years (i.e., to any long-haul destination) gave passport/visa requirements as a reason. Taken together, these results show the deleterious impact that the tougher entry requirements have had on intentions to visit Canada. Anything Canada can do to streamline visa processing would help to show Mexican visitors that they are still welcome here.

Unfavourable exchange rates is the only other travel barrier to see a significant shift in 2011. Mirroring the trend for long -haul travel as a whole, exchange rates as a barrier have dropped for the second straight year to hit 55% (down 11 ppt from the 2009 peak of 66%). Again, this is likely a result of the strong gains in the peso between the 2009 and 2011 GTW studies, as well as the increasingly well-to-do travelling population.

**Exhibit 9.1 Key Barriers for visiting to Canada  
(List top 8 barriers only)**

Top 2 Box



Base: Long-haul pleasure travellers who are unlikely to visit Canada in the near future (2011 n=286; 2010 n=330; 2009 n=304; 2008 n=276; 2007 n=237).

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

## 10. Conclusions: Key Take-Aways

Although Mexico was hit hard by the global recession, it rebounded strongly, with GDP growth of 5.4% in 2010 and 4.1% in 2011 ranking the country among the top three GTW markets in both years. While promising, the 2011 market outlook figure still falls short of its pre-recession high, pointing to some lingering anxiety in the marketplace. The ongoing consumer unease is also reflected in a market that has become increasingly skewed to more well-to-do travellers, as planners and less affluent consumers switch to short-haul or domestic destinations.

- To some extent, consumer fears have panned out since the 2011 survey was conducted in July 2011. Travel sentiments have deteriorated markedly as a result of a soft fourth quarter in 2011 (GDP growth of only 0.4%), persistent uncertainties in the US and Europe and stubbornly high unemployment. Not surprisingly then, consumer confidence has been highly erratic, closing the year with a steep plunge before rebounding in 2012. On top of this, the peso broke its upward streak in the latter part of 2011, dropping almost 20% against the US dollar and eroding the purchasing power of Mexican travellers abroad. This suggests that the road to recovery for Mexican long-haul travel may be a rocky one.
- Since introducing visa requirements for Mexican visitors in mid-2009, Canada has been struggling to gain ground on the key performance indicators (KPIs) in this market. Aside from a temporary lift on some measures in 2010 as a result of the Winter Olympics, unaided destination awareness, knowledge of travel opportunities, advertising awareness and destination consideration have all seen an overarching downward trend since 2008, coming to rest at record lows this year. Canada is not alone, with competitors such as Australia, China and Egypt all enduring similar declines and several of the European destinations bottoming out this year. This suggests that Canada's losses are not attributable to visa issues alone, but may also stem from travellers seeking out cheaper South American destinations in response to the tougher economic climate. The South American threat will only deepen in the future, with Brazil hosting the upcoming World Cup, Peru having lifted visa requirements for Mexican visitors, and new destinations such as Uruguay beginning to actively court Mexican travellers.
- Fortunately, the forward looking indicators for Canada are more positive. Travel intentions are another bright spot, enjoying significant upward momentum in 2011 after three years of successive declines. In fact, Mexico continues to rank among the top two international markets for Canada in terms of intentions. This suggests that long-term prospects in Mexico will remain strong once the economic uncertainties have abated.
- On the value side, marketing efforts could focus on "Quality", which is currently the weakest component of the Value Perceptions. "Quality" perceptions can also be heightened by drawing attention to Canada's best-in-class nature/outdoor products, as well as highlighting the facets of Vancouver, Montreal and Toronto that rank them among the world's most cosmopolitan cities.
- While price perceptions are less important than value in this market, cost issues are still a going concern in today's more cautious travel climate. Price Perceptions currently sit significantly below baseline levels, driven by faltering perceptions of costs for travel packages, airfare and food/entertainment. This likely stems from the growing popularity



of South American vacation spots, with their ultra-cheap prices making destinations like Canada seem more expensive by comparison. It will be important for Canada to get price points down as far as possible (e.g., through shorter trips, more cost-effective accommodations, airfare deals), while promoting value for money to the more affluent segments of the market (e.g., those with household incomes of 55,000 pesos per month or more).

- As in many other new or emerging markets, Mexican travellers have an unbridled enthusiasm for all manner of vacation pursuits, with Mexico emerging as one of the top three GTW markets for most of the products tested in the survey. While Mexicans typically enjoy a good mix of nature, culture and cities on their long-haul journeys, travel to Canada tends to be distinctive in that all of its top motivators relate to nature. In addition, for Canada outdoor pursuits tend to be ranked far better, although summer activities is a notable exception. Unfortunately for Canada, all of its eggs are in the nature/outdoor basket, with the GTW study revealing no real strengths beyond this. Moreover, Canada is losing ground to its competitors on nature/outdoor pursuits, falling 4 to 5 ppt on scenery, national parks, wildlife and water-based journeys. Clearly, recovering from the slippages on its heavy hitters is the first order of business for the CTC, but beyond this, land-based journeys and summer pursuits represent near-term growth opportunities.
- Aside from nature/outdoors activities, city experiences are likely Canada's best bet for broadening its product portfolio. In Mexico, "City" pursuits are a strong secondary motivator for travel to Canada, particularly city culture and sightseeing/shopping, with the latter being one of the top aspirational experiences as well. Moreover, both cities close to nature and nature close to cities are strengths for Canada and resonate well with Mexican travellers. While it would be tough to beat the market leaders (the US and France), a strong third place finish is definitely within Canada's grasp, pending a concerted push to supersede the current downward pressures. While cultural experiences can also be used to deepen the brand and add colour to Canada's image, this would be a much harder sell given the need to close a 25 to 50 ppt gap on most of the cultural products.