Image versus Position:

Canada as a Potential Destination for

Mainland Chinese

by

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AUTHOR'S DECLARATION

I hereby declare that I am the sole author of this thesis. This is a true copy of the thesis, including any required final revisions, as accepted by my examiners.

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Abstract

The potential of the Chinese outbound tourism market is substantial; however, research on this market to Canada is limited. This may be due, in part, to the lack of Approved Destination Status (ADS). This study examined the possible perceived image of Canada obtained by potential Chinese tourists, and to compare to the marketing position of Canada by CTC China Division-in effect, to conduct a product-market match between two concepts.

Content analysis and an importance and performance analysis were used in the study. A questionnaire distributed at the Beijing Capital International Airport solicited perceptions of tourism in Canada, importance of selected attributes in travel decision making, performance of selected attributes on Canada, and trip preferences. The marketing position of Canada was examined through a content analysis of the promotional materials circulated from CTC China Division in Beijing, China. The coherences and gaps between perceived image of Canada and marketing position of Canada provide some marketing implications.

This study concludes that the general tourism image of Canada is vague but positive, which is probably derived from the historically favorable image of Canada in china. Potential Chinese tourists had little knowledge on specific tourism sights; however, they recognized star attractions of Vancouver, Niagara Falls, and Toronto. Potential Chinese tourists prefer slow-paced trips; group tours; two weeks in length; in fall season; featuring mid-budget accommodation, preferably bed-and-breakfasts; on motor coach; visiting nature based sights at majority; and providing foods of various cultures. The current marketing position of Canada reflected through promotional materials by CTC and its partners has coherences in promoting tourism attractions in Canada to the image of Canada. Gaps exist on the promotion of travel issues and unconventional attractions, which inspires the marketing implications. Promotional resources should be allocate to unconventional tourism

attractions with consideration rather than the presence of Chinese and mandarin speaking environment in Canada because of Chinese tourists' demand for culture diversity. Promotion should include more information about travel expense and visas to establish reasonable consumer expectations.

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List of Abbreviations

ADS	Approved Destination Status
APF Canada	Asia Pacific Foundation of Canada
CNTA	China National Tourism Administration
CSD	Census and Statistics Department
CTABC	Council of Tourism Administration of British Colombia
CTAMS	Canadian Tourism Attitude and Motivation Survey
CTC	Canadian Tourism Commission
DMO	Destination Marketing Organization
DSEC	Statistics and Census Service
FDI	Foreign Direct Investment
IPA	Importance and Performance Analysis
ODP	Open Door Policy
PIVC	Participates Interested in Visiting Canada
PNIVC	Participates Not Interested in Visiting Canada
P.R.C.	People's Republic of China
RMB	Chinese currency Ren Min Bi
SAR	Special Administrative Regions
SEZ	Special Economic Zones
SMT	Singapore, Malaysia, and Thailand
TAMS	Tourism Attitude and Motivation Survey
TTRA	Travel and Tourism Research Association
U.S.A.	United States of America
USCBC	US-China Business Council
VFR	Visiting Friends and Relative
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council

Chapter 1 Introduction

Deng Xiaoping (1904-1997), a legendary figure in the history of modern China, spearheaded the remarkable campaign to rejuvenate the Chinese economy (Xiao, in progress); as the result, the "open door policy" (ODP) was implemented in December, 1978. Since the formation of People's Republic of China (P.R.C.) with communist social structure, the country of China had operated under a closed economy for 30 years up until the implementation of ODP. Instead of continuing the economy development in an isolated environment, this policy opened up a number of geographic regions as Special Economic Zones (SEZ) to foreign trade and tourism. Since then, the Chinese economy has expanded rapidly. The city of Shenzhen, as the first SEZ, was transformed from a small fishing village to the largest import/export city with the fourth highest annual GDP (Shenzhen Municipal Government, 2005). The development of Shenzhen should be fully credited to the ODP.

Council of Foreign Relations (2000) stated that the implementation of this policy is the reason that China has become the second hottest investment destination country after the U.S.A. The US-China Business Council reported a total of 1094.94 billion USD foreign direct investment (FDI) in China from 1979 to 2004; the FDI increased 33% in year 2004 alone (USCBC, 2005). This resulted in a high economic growth and a steady 8.2% increase in GDP from 1998 to 2003 (NBSC, 2005), which has created headlines all around the world. As the second largest economy in the world indicated by World Bank (2005), China has become an economic giant in the world (Cox & Koo, 2003).

Along the rapid economic development, China's international tourism development is also remarkable. According to World Tourism Organization (WTO, 2005), China has become the fifth most popular international destination with 36.8 million international arrivals in year 2002; the total international tourism receipts have also reached 20.4 billion USD in the same year, also ranked as the fifth in the world. The World Travel and Tourism Council (WTTC) described China "has the

potential to become one of the world's great tourism economies" (WTTC, 2003, p4). The WTO also forecasts that China will become the world's largest inbound tourism destination and the fourth largest outbound tourism destination (WTO, 1999) by 2020.

The Chinese outbound tourism market has become an ever-growing pie and others countries are eager to share a piece. The Canadian Tourism Commission (CTC) stated that "with the largest population on earth reaching 1.3 billion, the Chinese are avid travelers (CTC, 2005)". Currently, 108 outbound tourism destinations, including Special Administrative Regions (Macao and Hong Kong), have been identified as potential "approved destinations" for Chinese tourists. Negotiations have been successfully completed with 86 of these (CNTA, 2007).

Approved Destination Status (ADS) is a bilateral tourism arrangement between the Chinese government and a foreign destination whereby Chinese tourists are permitted to undertake leisure travel in groups to that destination (Commission européenne, 2005). "This agreement establishes a quota for outbound trips and authorizes a limited number of travel agencies to handle travel to the destination" (APF Canada, 2002).

Many countries have been benefited from the outbound Chinese tourism market by obtaining ADS; among these, Australia is probably the most relevant example for Canada according to its similar size of tourism industry, infrastructure and language. The Australian government stated the following in its "ADS Application Package" guide:

> *The ADS scheme has facilitated significant growth in leisure travel from China with over 160,000 Chinese ADS visitors in around 10,500 groups traveling to Australia since 1999. The Tourism Australia Forecasting Committee has recognized ADS travel as an important elements in driving growth in inbound tourism from China. It estimates that Chinese inbound travel will record average annual growth of over 16 per cent over the next decade, resulting in approximately 1.2 million Chinese visitors per year by 2014 (Australian Government, 2005, p1).*

Only ADS countries are allowed to promote tourism products to Chinese residents; Chinese outbound tour operators are not allowed to promote or sell leisure tours to non-ADS countries to Chinese residents. ADS is essential for any nation seeking to develop a significant inbound tourism market from China. Even though there is no guarantee that ADS from the Chinese government will bring Canadian tourism industry as much revenue as Australia has received, it is clear that the Mainland China outbound tourism market offers substantial opportunities and ADS is needed if the Canadian tourism industry is to enjoy a chance to compete for this large market. With ADS, Canada will join a growing number of nations that are able to provide information directly to consumers.

The negotiation of ADS between China and Canada started in 2005 with a very slow progress compared with other countries with preliminary status at the same time; currently, it is uncertain that Canada will obtain ADS in the near future. However, it is noticed that with or without ADS, a great increase on the number of Chinese tourists coming to Canada has occurred (APF Canada, 2006).

1.1 Purpose and Research Questions

The Canadian tourism industry is still in negotiation on Approved Destination Status (ADS) with the Chinese government (CTABC, 2005; CTC, 2005; Tourism Vancouver, 2005). This approval will open up opportunities for Canadian operators to promote directly to Mainland Chinese consumers and the hope of the Canadian tourism industry is that the Chinese market will be a major growth market. If ADS is granted, promoting Canada as a long-haul international tourism destination to potential consumers in Mainland China will become critical to Canadian Tourism Commission. At the same time, Canadian tour operators and tourism enterprises will focus on promoting their product and services to this large market.

Without ADS, Canadian tourism organizations or companies are not permitted to promote Canada or advertising Canadian tour products in Mainland China. Currently, the only Mandarin language promotional materials on Canada available in Mainland China are from CTC China Division located in Beijing. "Promotional materials" refers to "materials containing induced information on either the tourism destination or tourism products, created by either the destination marketing organizations or tourism enterprises from that region with a clear attempt to promote the destination image or market to consumers in seeking for sales" (Gartner, 1993).

Lacking access to direct promotion information, Mainland Chinese's destination image of Canada is the result of processing information from general public, friends and relatives, or other public and general information sources. It is uncertain that the destination image of Canada is the representative of what Canada truly is and what Canada offers as a tourism destination. To this extent, it is even uncertain that the general Mainland Chinese population has formed a clear image of Canada as a destination.

Gartner (1993) pointed out that a successful destination image should be created and delivered

based on the understanding of the images held by consumers currently. As well, tourism product development and promotion should be based on a clear foundation of consumer research which may include demographic characteristics, motivations, and preferences, and destination image. Even though a number of studies have been carried out on the Chinese outbound market (Cai, Boger, & O'Leary, 1999; Cai, O'Leary, & Boger, 2000; Qu & Li, 1997; Ryan & Mo, 2001), only two studies had been conducted by CTC (2001a and 2006) on Canada as a long-haul international tourism destination and consumer research on the needs, wants, and expectations of Mainland Chinese traveling to Canada. Further independent research is in need on the subject of potential Mainland Chinese tourist's perception of Canada to expand the knowledge on the potential Chinese tourists and their expectations of Canada.

Mi (2003) argued that simply describing the consumer perception of certain destination is pointless because the enormous number of aspects involved in the process of destination image research; studying destination image is necessary to compare the tourists' perceptions and destination images with marketing position of the destination to strategies and insights both for the academic field, and the tourism and marketing development.

In respond to the call for independent research, this study is designed to assess the coherence and/or differences between the perceived destination images of Canada by potential Mainland Chinese consumers to, the other hand, the marketing position of Canada by Canadian Tourism Commission and its partners if ADS is granted. The following research objectives are identified:

1. To assess the level of interest of these consumers in visiting Canada for vacation.

2. To identify demographic and trip characteristics of potential Chinese tourists to Canada.

3. To identify the destination image of Canada as a long-haul international tourism destination held by potential Chinese tourists to Canada.

4.   To identify potential Chinese tourists' desired trip attributes and travel preferences (as described below in "Research Questions") for Canadian tourism products. Because Chinese outbound tourists prefer group tours, the thesis will emphasize, but not be limited, to group tours.

5.   To identified the marketing position of Canada presented by Canadian Tourism Commission and its partners.

6.   To identify coherences and/or gaps between the tourism images of Canada held by potential Chinese consumers to the marketing position of Canada presented by Canadian Tourism Commission and its partners.

Eight research questions will be answered to fulfill the above objectives:

1.   What is the level of intention of these consumers to visit Canada? Why are they interested and why not?

2.   What are the demographics of potential Chinese tourists? Are those different from the demographics of Chinese consumer who are not interested in Canada?

3.   What are the trip characteristics of potential Chinese tourists? Are those different from the trip characteristics of Chinese consumer who are not interested in Canada?

4.   What is the image of Canada as a long-haul international tourism destination described by potential Chinese tourists?

5.   How potential Chinese tourists evaluate tourism of Canada in terms of image attributes?

6.   What trip attributes is sought by potential Chinese tourists in terms of:

- Most popular visiting seasons

- Preferences for individual versus group travel

- Types of tours and activities preferred

- Types of accommodation, food, transportation preferred

- Preferred pace of the tour

- Preferred types of sights

- General travel budgets

- Preferred sources of information

7.   How's the performance of tourism attributes of Canada promoted in the Mandarin-language marketing materials circulated through CTC China Division?

8.   What are the coherences and/or gaps between the perceived images of Canada as a tourism destination held by potential Chinese tourists, to the other had, the marketing position of Canada presented by CTC and its partners?

1.2 Significance of the Study

The result of the comparison of perceived destination image of Canada and marketing position of Canada is going to reflect the coherences and/or gaps between produce and market sides of the tourism market, thus to assist the Canadian destination marketing in China. In addition, the finding of Chinese outbound tourists' general needs, wants, and expectations from a Chinese consumer will assist Canadian tourism companies to create and deliver successful tour products in Mainland China.

A number of literatures have studied destination image (Bignon, Hammitt, & Norman, 1998; Chaudhary, 2000; Chen & Hsu, 2000; Dimanche & Moody, 1998; Gartner, 1993; Goodall, 1988; Ratkai, 2004). Most existing destination image research studies consumer's perception of a destination during or after their travel experience, a small portion of the research had considered consumer's perception of a destination before the travel arrangement and travel experiences (Pike, 2002). Further, there has been little research published on potential Chinese tourists' perceptions on a new destination. Thus, this research can contribute the destination image literatures.

In conclusion, this study will compare the images of Canada held by potential Chinese tourists to Canada and their preferences for tourism experiences, to the other hand, the marketing position of Canada presented by Canadian Tourism Commission and its partners through existing tourism promotional materials, (based on Mandarin-language brochures and other material that have been collected from CTC China Division in Beijing, China).

Chapter 2

Mainland Chinese Outbound Market and Tourists

Before the discussion on the history and policy implementation in the outbound Chinese tourism market, it is necessary to clarify some basic terms and concepts. Most tourism statistical sources, including the WTO, lists Hong Kong and Macao separately from China in their reports because, Macao and Hong Kong are Special Administration Regions (SARs). Although part of People's Republic of China, SARs are largely independent from the central government of China; the local government legislates and they regulate the area with little interference from Beijing. Most significantly, a SAR can operate in a market economy, and the social and political structures can be different from Mainland China (Xinhuanet, 2005).

Thus, in tourism practice, Hong Kong and Macao are considered "outbound tourism destinations" by both CNTA as well as by the WTO. This distinction is also made by the CTC (2001a), which stated its interest on the 1.3 billion populations of "Mainland Chinese". This does not mean Hong Kong or Macao are not potential markets for Canada; Hong Kong itself generated 5.9 million overseas travelers in 2000 (Wong & Kwong, 2004). However, the term, "Chinese outbound tourism market" in this report refers to the outbound tourism market in Mainland China. In 2000, CNTA reported 10.5 million outbound travelers (CNTA, 2005); this includes travelers to short-haul and long-haul destinations for all purposes.

2.1 The History of Outbound Tourism from Mainland China

The history of outbound tourism from Mainland China has not been well studied. In one of the few studies, G. Zhang, Pine, and H.Q. Zhang (2000) described the history of Chinese international tourism as going through three development stages as:

- Tourism as an aspect of part of foreign affairs (1949-1966), during which only Chinese citizens traveling outside are for the purpose of foreign affairs were permitted to travel

- A stagnation period (1966-1978), in which very few Chinese citizens traveler overseas because of the influence of the culture revolution

- Tourism emergence as an important economic activity (1978-1985), during which inbound tourism was promoted as foreign exchange generator and outbound tourism also showed some increase, although only at minor levels

- Tourism as a significant contribution to the national economy (1986 onwards), in which the Chinese government recognized the importance of international tourism and started to relax outbound travel policies; inbound travel also increased significantly during this period.

This classification is based on observation as well as government officials' speeches or statements between 1992 and 1999 (Sun, 1992; Jiang, 1997; He, 1999), which all interpreted tourism development from the economic development perspective. This study overlooked the significant growth in the tourism development after 1986.

More recently, Zhang (2005) divided the tourism development history after 1983 into an experimental period of family visiting (1983-1997); a period of adjustment and devolution (1997-2002); and a period of rapid development since 2002. This classification follows the international tourism policy formation process in Mainland China, which has placed more focus on the nature of visitors and visiting purposes than the pure economic perspective. Chen and Harrah (2005) have also

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cited a dramatic increase of the private travelers (20% annually) to international destinations from China from 1991 to 1997. [Please notice that CNTA only categorized outbound Chinese by business purposes or purposes other than business. Here private travelers refer to the travelers for purposes other than business.]

Based on the above studies, the author suggests four stages of the Mainland Chinese outbound tourism development: an early stage of 1983 to 1990, a "boom" period from 1991 to 1996, an adjustment stage of 1997 to 2002, and the rapid development stage since July, 2002.

<u>Early Stage (1983-1990)</u>

Before 1991, the outbound trips made by Chinese were either for the purpose of government affairs, education, or business. Considering the tight government control and the very low income level, there were no real "outbound tourism activities" by the general public in this early period.

<u>The Boom Stage (1991-1996)</u>

Even though the agreements allowing Chinese citizens to visit relatives in Hong Kong, Macao, Malaysia, Singapore, and Thailand were signed before 1990, the real growth of outbound tourism started only in 1992. This period is considered as the beginning of the market by tourism practitioners. However, the legislation at the time was only at its experimental stage, which leaded to a number of issues including the fraud. While experiencing rapid growth, the market was marred by frequent incidents of fraud lodged by travelers against unscrupulous tour operators.

<u>Adjustment Stage (1997-2002)</u>

In March 1997, with the approval of the State Council, the CNTA and Ministry of Public Security (MPS) jointly promulgated "Provisional Measures on the Administration of Outbound Tourism for Chinese Citizens at Their Own Expense". This was formally implemented on July 1st of the same year (Zhang, 2005). This "Temporary Measures" established regulations governing outbound tourism; managerial principles, operational measures and procedures on appropriately handing

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outbound tours for outbound travel agencies/tour operators; the responsibilities, rights and benefits of tourists and tourist enterprises; as well as punitive measures for not able to meet the operational measures from CNTA. This Act regulated the opening of the outbound tourism market and protected the outbound tourists by clarifying many grey areas where some operators had been engaging in unethical or corrupt practices. One major aspect of this period is the establishment of ADS; even though the agreement between China and other countries or regions on travel had been established for a decade, the formal term of ADS was not in use until then.

Additional regulations were implemented from 1997 to 2001 to cover all aspects of the outbound tourism market. Outbound Chinese tour operators were required to obtain a government license and a number of agencies from other countries were appointed as receptive operators in those countries. During this time, "Golden Week" celebrations (the week following the national day of October 1st) began to be expanded to promote greater travel, thus increasing opportunities for outbound tour operators to generate business.

Rapid Development Stage (2003-present)

The State Council promulgated and implemented "Managerial Measures of Outbound Tourism by Chinese Citizens" in 2002; the passage of this legislation marked a new era in outbound tourism. This measurement functions the same as the "Provisional Measure" as mentioned in the last stage. This formal measure was implemented in response to government experiences during the "adjustment stage" and enacted to protect both outbound tourists and tourism enterprises when engaging in outbound tourism activities. During the three years since July 1, 2002, the number of outbound tourist destinations for Chinese citizens has increased dramatically. Seventy-six countries and areas have been designated as potential approved outbound tourist destinations; 50 of these have been formally approved. The outbound tourist market has finally become an important component of Chinese tourism industry.

2.2 Studies on Current Mainland Outbound Tourism Market

Because of the fairly small size of Chinese outbound market before 1990, few studies have been conducted on the Mainland Chinese outbound tourism market. However, the rapid development of this market in the last two decades has attracted attention form both the tourism industry world wide and the tourism academics and researchers.

In 2003, the World Travel and Tourism Council (WTTC) published a study on the impact of tourism on the economy in China and Hong Kong SAR. This report stated "China has the potential to become one of the world's great tourism economies, in terms of inbound, domestic, and outbound travel" (WTTC, 2003, p4). In terms of outbound market, WTTC reported an average of 15% annual increase in this market and Asian destinations accounted for 85% of all trips in 2001. Chinese tourists are among the highest spenders per capital on travel abroad, generating an average US $2,090 per trip for an average 12-night trip, according to the China Travel Monitor (Cai et al, 1999; CTC, 2005; WTTC, 2003).

In the Canadian context, CTC has carried out four studies on China from 2001 to 2005. The Canadian Tourism Commission was established in February, 1995 with main responsibilities of:

> Marketing Canada as a tourism destination to international and domestic tourists. The market research and resulting promotional programs [are] the major focus of the Commission's efforts. The secondary responsibility [will] be to provide support for the existing tourism associations, such as the Tourism industry association of Canada and other groups, in resolving issues of importance. (Smith & Meis, 1996, p481)

The CTC research on "an overview of China's inbound and outbound tourism market" (CTC, 2001b, p.11) states that 84.6% (7.8 million) Chinese outbound tourists traveled to destinations within Asia in 2000. Hong Kong SAR and Macao SAR are the most popular destinations attracting 3.6 million and 1.6 million Chinese, respectively, followed by Thailand, Japan, South Korea, Singapore, and North Korea. Canada attracted less than 76,000 Chinese in the same period. Over half of

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Chinese visits were for business purposes; the balance was for activities such as study trips and visiting friends and relatives. Also the CTC report on China suggests the WTO's relatively optimistic projections of China's future outbound tourism growth need to be tempered with caution for reasons of restricted travel policies on Chinese citizens; heavy competition from European countries, Australia, and New Zealand; uncertainty of future income and employment growth in China; uncertainty of future employment rate in China; the problematic issue of poverty; sharp regional and global stock market declines; and devaluations of Chinese currency.

In the same year, the CTC also published The Chinese Outbound Travel Market (2001a), that identified four cities with the most potential market for Canada: Shanghai, Beijing, Guangzhou, and Shenyang, Liaoning Province, China. The three top criteria to Chinese in choosing a destination were cited as scenery, safety, and sanitation. Cost, of course, also plays very important role. The report also indicates that Chinese visitors are not attracted to Canada for vacations because of its history. The dominant image of Canada is that of a place with long, cold winters. Tourism operators interviewed in China cited several barriers beyond the lack of ADS. These were the complexity of securing a visa; language differences; limited air access; and lack of awareness of both the country and its tourism products. The report suggested that Canada needed to build its image as place that offers a unique mix of nature, culture, and history. The report also suggested the creation of package tours lasting less than seven days using three-star or medium-priced hotels.

An update of the study on the Consumer and Travel Trade Research in China was commissioned to Decima Research by CTC in 2005. The result of CTC's study was released to the public in July 2006 (CTC, 2006) in discussion of the Chinese consumers' travel attitudes, interests, motivations, perceptions, and the competitive position of Canada. This study had identified Shenzhen, instead of Shenyang, as the key market compared to the previous study. The image of Canada held by Chinese consumers was "safe, clean, and welcoming destination". The general awareness of Canada was

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good among Chinese; however, there was a lack of knowledge of specific attractions, signature travel experiences, and regional characteristics. Canada was closely competing with Australia and Europe in the tourism market.

   CTC's recent report on China, Marketing Intelligence Profile of China (CTC, 2005), emphasizes the importance of obtaining ADS because of the fact that 70% of Chinese outbound tourists go to nations with ADS. Currently, the mix of Chinese travelers to Canada is: 45% are visiting friends and relatives (VFR), 15% for leisure purposes, and 25% for business. This mix will likely change after ADS so that VFR and especially leisure will claim a higher market share. Overall, this report paints a positive picture of the Chinese outbound market and its future development.

2.3 Tourism Policy and Implementation

In a discussion of tourism policy and implementation, the WTTC stated that the Chinese government's policy toward outbound tourism has been to develop this market in a "planned organized and controlled way" (WTTC, 2003, p20). It also pointed out that the scale and pace of tourism development and future potential growth put Chinese government structure, agencies and officials in a unique, difficult, and tenuous position of trying to keep up with events and fast-paced development that they have previously managed to control under a different set of circumstances. After the SARS epidemic, WTTC recommended a new vision of openness, collaboration, and co-operation between the public and private sectors. This statement is also supported by Zhang, Chong, and Jenkins (2002); they also recommended industry associations should be separated from government framework and become independent organizations to represent the interests of tourism industry and serve as a communication channel between the government and enterprises.

2.4 Chinese Outbound Tourists to Canada

Mainland Chinese tourists are allowed to travel only to ADS approved countries for tourism

purposes; Canada, without ADS, has not yet hosted Chinese tourists. This statement does not imply that there have been no Mainland Chinese visitors for the tourism purposes in Canada. Indeed, as the CTC (2005) reports, 76,800 overnight trips to Canada were made by Chinese visitors in 2003. Escorted tours catering to Mainland Chinese citizens interested in visiting North America have been operating for years. Because of the lack of ADS, tourists from China currently come for business, education, or visiting friends and relatives (VFR) purposes. The finding by CTC (2006) showed that VFR, combined business-pleasure and combined study-pleasure dominated the Chinese travel to Canada.

A Chinese citizen who wants to visit Canada can participate in a business group travel and he/she is required make a large security deposit (the amount varies by agency) to an outbound travel agency in order to guarantee his/her return (Stardaily, 2005, Feb 11). The visa application process for group travel is usually handled by the outbound travel agency; the process itself is quite complicated, but approval rate is higher compared to the visa process for individual Chinese who intend to visit friends and relatives. VFR travelers usually require two to three months and a few thousand RMB (equal to a month's salary of a white collar worker) to prepare documents with English translations and to apply for the temporary resident visa (Canadian Embassy Beijing, 2005).

The approval of ADS will provide great opportunities to Chinese citizens who are interested in Canada, shorten the visa application process, and increase the approval rate for visa applications. These changes should result in a substantial increase in the number of Chinese tourists to Canada if ADS is granted.

The main task in attracting Chinese visitors to Canada is to position Canada as a tourism destination that offers the types of experiences sought by Chinese tourists at a cost that is competitive with other long haul destinations. While the there is anecdotal evidence that the Chinese generally

see Canada as a cold and uninviting destination (CTC, 2001a), there is a need to more objectively and precisely understand the Mainland Chinese' perception of Canada in promotion should be discovered, while also looking at the consumer behaviors of Chinese tourists.

2.5 Tourism Consumer Behavior of Chinese Outbound Tourists

Hong Kong, as one of the first areas granted ADS, attracts millions of Chinese each year. In 2006, close to 14 million Chinese visited Hong Kong (China Net, 2005); it was ranked as the first for Chinese outbound travelers. Because of the phenomenon of masses of Chinese tourist arriving each year, a number of studies were undertaken to study Chinese tourists.

2.5.1 Asia Region

Qu and Lam (1997) created a travel demand model for Mainland Chinese tourists to Hong Kong with factors including disposable income; relative prices; exchange rates; and political, cultural, and policy-related issues. The results from a stepwise multiple regression analysis show that disposable income per capital and the relaxation of visa requirements contributed significantly to the increase of travel demand of Mainland Chinese visiting Hong Kong.

Zhang and Lam (1999) studied Chinese tourists' motivations to visit Hong Kong using principal component factor analysis to identify the push and pull motivation dimensions. Hong Kong's image as a "high-tech" centre, shopping heaven, accessibility to Mainland China, excellent service quality of hospitality staff, opportunities for sightseeing, and cultural links are identified as drawing forces of Mainland Chinese. This study further suggested Hong Kong should project its image as a high-tech multinational city in the world to attract more Mainland Chinese visitors.

Qu and Li (1997) examined the characteristics, travel patterns, destination selection attributes, and perceptions and satisfaction level of Mainland Chinese visitors to Hong Kong. The study revealed

that the majority of Mainland Chinese visitors are male, married, between age 26 to 45, holding white collar positions. Generally, the Mainland Chinese visitors were satisfied with all aspects of their experience except prices.

Focus groups were employed in Huang and Hsu's (2005) study of Chinese residents' perceptions of and motivations for visiting Hong Kong. Five focus groups discussions were conducted in Beijing and Guangzhou. The result shows that Mainland Chinese residents perceived Hong Kong mainly as a shopping destination; their primary motivation for visiting is to go shopping, as well. Knowledge enhancement, curiosity, family togetherness, and kinship enhancement, sightseeing, experiencing different culture and lifestyle, and visiting friends and relatives are also identified as motivations. The barriers of time, budget, language, complexity of getting travel documents, and inadequate accommodation discourage Chinese residents from visiting or revisiting Hong Kong.

Looking at destinations in Asia other than Hong Kong, Cai et al. (1999) investigated the socio-demographic characteristics and trip attributes of Chinese tourists who visited the Singapore, Malaysia, and Thailand (SMT) area, and further discussed the differences their characteristics and attributes from those Chinese tourists who visited other destinations both within and outside the Asia-Pacific region. The empirical investigation utilized data from a China Outbound Travel Market Survey, conducted in August and September 1994 by Pacific Asia Travel Association. A number of variables are studies in this research as shown in Table 2.1 SMT Study Attributes.

Table 2.1 SMT Study Attributes

Demographic	Travel Attributes and Experiences
Gender	Trip purpose
Age	Type and size of travel party
Education	Pre-trip planning and information search
Place of work	Type of attractions visited
Occupation	Budget of trip-related personal expenditure
Marital status	Actual total spending and spending breakdown
Family composition and size	
Household income	

The results show similar socio-demographic characteristics as that in Qu and Li's study (1997). Further, this research pointed out more than half the travelers obtain a family income of RMB 1600 to 4000 per month (Canadian dollar $200 to 500).

2.5.2 Australia and New Zealand

A few studies have been done on the Chinese visitors to Australia and New Zealand. Pan and Laws (2001) conducted a study on the characteristics of the Chinese outbound tourism market to Australia. This study pointed out that the most common form of travel for Chinese tourists is all-inclusive package tours including airfares, private chartered coach travel in Australia, sightseeing, local guides, accommodation, and meals (mainly Chinese food). Cultural differences were not factors in preventing Chinese tourists from visiting Australia. Many Chinese tourists are disappointed at the accommodation because the rating system in China is a star higher than the rating system in Australia. This indicates the inadequate communication between consumers and tour operators. The authors also discovered that products in the market are all very similar which leads to a great price competition between tour operators. Generally, the Chinese tourists do not have a clear image of

Australia; moreover, language differences represent a major barrier for Chinese tourists.

Ryan and Mo (2001) looked at demographics and perceptions of Chinese visitors to New Zealand in 2000 after New Zealand had been granted ADS. The study assessed Chinese visitors' perceptions of New Zealand as a destination, and attempted to define segments within the inbound Chinese market. It utilized a Chinese-language questionnaire based on an importance-performance model, employing a Likert scale in measuring respondents' attitudes and satisfaction.

This study shows that the Chinese tourists prefer less adventurous activities, such as sightseeing, visiting museum and galleries, or go shopping rather than participating in sports or recreational activities such as camping and cannoning. Language is a major barrier for these visitors on the trip; many Chinese have to participate in group tours because of their lack of English abilities. The socio-demographic characteristics are in aligning with that of Qu and Li's (1997) and Cai et al's (1999), except the age category. This study shows that the dominant clients came from age 26-59, which largely overlapped with the commonly reported 26-45.

Ryan and Mo (2001) further clustered these visitors into four categories as sightseers in new places, the investment seekers, and the package holidaymakers. The Chinese citizens who do not want to travel in a group tour normally apply for a business class visa in order to travel in New Zealand. The subgroup "investment seekers", in this case, contains both true investors on business mission and travelers on business visa for pleasure purposes.

Comparing tourists to the SMT area with tourists to other Asia-Pacific destinations and tourists to destinations outside of Asia, the research shows that visitors to the SMT area take significantly less time preparing travel documentations by relying heavily on travel agencies or their employers. Most travel information obtained by visitors was provided by travel agencies, trip organizers, or organizations that had invited the Chinese visitors to SMT. Close to half the tourists follow the tour

schedule provided by travel agency/tour operators or tour organizers with very little other information on hand. The majority of visitors came for business purposes rather than pleasure or personal reasons. The shorter process of preparing travel documents should be credited to the ADS agreement in which host countries' immigration offices are expected to simplify the tourist visa application process.

2.5.3 North America

Few studies have been published on Chinese tourists to North America probably because of the low number of Chinese tourist arrivals each year. In 2000, 395,107 Chinese visitors arrived in the US, which is only about 4% of the overall number of outbound Chinese tourists. In the same year, over ten times this number visited Hong Kong (CNTA, 2005). Beside the high cost of visiting the US, visa restriction by the US government and the lack of tour products created for and promoted to Chinese are main factors for few Chinese visiting the United States. As mentioned before, without ADS, no tour operators can promote or delivery tourism services to Mainland Chinese citizens.

Cai et al. (2000) examined demographic, socio-economic, and trip-related attributes of Chinese visitors to the US by comparing them with 1) Chinese travelers bound for nine Asia-Pacific countries and regions designated by the Chinese government as ADS and with 2) Chinese visitors to Japan and Western Europe. People traveling overseas between 1991 and 1994 from Beijing, Shanghai, and Guangzhou to the US were surveyed. The results shows that US-bound travelers can be characterized as the very well-educated, male-dominant, the oldest visitors among all outbound tourists, and with the primary purpose of travel being business. The research found that the popular places for most of the Chinese travelers are shops, restaurants, historic sites, and theme parks.

Jang, Yu, and Pearson (2003) carried out a study on the Chinese travelers to the US on the basis of the main purposes of their visits (business versus visiting friends and relatives) by utilizing the same

database. They examined Chinese travelers' behavioral characteristics, including the way information was sought, airline reservation patterns, and leisure activity participation. The results show some commonality in socio-demographic characteristics such as a male-dominated visitor profile with managerial, executive, or professional positions and a household income of less than $20,000 (US). The main information source is the travel agency, which handles over 60% of all travel arrangements in the sample.

Chinese visitors were most interested in less adventure-oriented travel and were more interested in cultural-oriented activities such as sightseeing and visiting museums, as well as the dining and shopping. In contrast to previous studies, 85.5% of the visitors traveled independently (i.e., not on a packaged tour). This finding is not unexpected because the US does not enjoy ADS and thus no formal US package tour companies are allowed to advertise or sell in the Chinese market.

In terms of Chinese outbound tourists' preferences for types of vacation experiences, the WTTC (2003) indicates that 40% of the overall tourists prefer city holidays, followed by sun and beach holidays (27%), and touring trips (20%). Also, the average age of outbound Chinese tourists (37) is younger than travelers from most of the world's key markets.

2.5.4 Common Characteristics of Mainland Chinese Outbound Travelers

Summarizing from the above studies, Chinese visitors are most likely to be male, married, college or university educated, aged 26 to 50, with professional or managerial positions, and with a household income less than $20,000. In terms of trip attributes, Chinese tourists are commonly reported to favor less adventurous activities, preferring, instead, cultural, historical, and heritage activities and attractions. Most Chinese travelers rely heavily on travel agencies and trip organizers to arrange travel itinerary and for travel information.

Most existing studies have focused on the socio-demographic characteristics of the Mainland

Chinese visitors, as well as travel attributes, preferences, and other issues such as information sources and air travel patterns, Chinese perceptions of specific destinations are rarely studied. Further, there has been no research published on the potential Chinese tourists' perceptions on a new destination. Therefore, this research will examine the perceptions, awareness, and interests of Mainland Chinese consumers towards Canada as a tourism destination.

To simply describing the consumer perception of certain destination requires massive amount of effort because of the multidimensional definition of destination image (Mi, 2003). However, destination image research is essential to destination promotion. Instead, it is necessary to compare the tourists' perceptions and destination images with the marketing position of the destination; the result of this comparison will benefit both the academic field and the tourism and marketing development. Thus, this thesis will compare the perceived image of Canada held by potential Chinese tourists to the marketing position of Canada presented by CTC and its partners. The following chapter will further describe the theoretical foundations of this research in order to fulfill the research objectives.

Chapter 3

Destination Image versus Destination Branding/Position

The study of tourism is multidisciplinary in nature by drawing on many theoretical foundations such as psychology, sociology, social psychology, anthropology, and economics (McIntosh, Goeldner, & Ritchie, 1995). This literature review focuses on several inter-related parts of the tourism literature – that associated with tourism destination image, tourism destination branding, and consumer behavior in tourism.

3.1 Destination Image

The study of destination image in tourism marketing and management started in 1970s. Dr. John Hunt described his experience of destination image research undertaken in 1970 with Edward Mayo and Clare Gunn as "three peasants breaking in a new field", during the Travel and Tourism Research Association (TTRA) conference, Los Angeles, 2004. In 1971, he completed his doctor's dissertation titled "Image: a factor of tourism" which is recognized as one of the first studies in the field (Echtner & Ritchie, 1991; Embacher & Buttle, 1989). Since then, a number of studies had been undertaken to exam a variety of topics related to tourism destination image. In the theory foundation of destination image and image components, Ratkai (2004) had done a thorough study of 39 researches; 32 of these studies had provided their definitions of destination image.   In terms of studies of measuring destination image, Pike (2002) reported a total of 142 academic papers published on the topic of destination image by 2000. Among the 142 studies, over half measured the perception of only one destination and the most popular type of destination of interest was countries, and less than half of the papers utilized qualitative methods in their research (Pike, 2002).

Studies of destination image indicate a wide range of interests which can be summarized in the

categories: conceptualization and dimensions; destination image formation process; assessment and measurement of destination image; influence of destination image; destination image change over time; active and passive role of residents in image formation; and destination image management policies (Mi, 2003).

3.1.1 Definition of Destination Image

Even though studies of destination image have been carried on for 35 years, the definition of tourism destination image is still vague; as well, the term has been used in a variety of circumstances, including those pertaining to the destination images projected by tourism promoters, the publicly held or "stereotype" image of destinations and the destination images held by individuals (Echtner & Ritchie, 1991; Jenkins, 1999). Hunt (1975) first identifies destination image as "[t]he expression of all objective knowledge, impressions, prejudice, imaginations, and emotional thoughts an individual or group might have of a particular place." Many researchers have refined the definition of image since then.

Crompton (1979) suggested that the image of a tourist destination is the aggregate sum of beliefs, ideas, impressions, and expectations that a tourist has about a destination. By 1991, Echtner and Ritchie still noticed that many of the definitions used in the previous studies were quite vague; this situation is improved little even after a decade of further research. Another 12 years later, Kim and Richardson (as in Ratkai, 2004) defined destination image as a totality of impressions, beliefs, ideas, expectations and feelings accumulated toward a place over time; this definition is still imprecise.

Ratkai (2004) stated that "although the definitions have become more sophisticated over time, destination image still lacks a comprehensive, operative definition". She later suggested "a simplified, subjective interpretation of the relevant qualities or symbolic elements of a destination which consist of holistic impressions and/or destination attributes which may be of a functional,

psychological, common or unique nature."

Compared to the previous definitions, Crompton (1979) emphasized the subjective individual perceptions of the visitor, while Hunt (1975), Lawson and Baud-Bovy (1977) focus on the single or collective perceptions of visitors for a tourism destination. Though individual's image of a certain destination is essential, the marketing practice requires a more generalized image of a destination as the foundation in developing promotion strategy. Further, the image that held by one visitor is commonly shared by other members of the certain group (a market segment) and influenced by other members' image as well. In this study, the destination image of Canada is going to be studies focused on the common perceived quality of attributes which may be functional or psychological.

3.1.2 Nature of Destination Image

When discussing the nature of destination image, Gunn (1989) described two types of image: organic image and induced image. Organic image refers to the image resulting from consumers' assimilation of materials from newspapers, periodicals, books, and other media that are not intentionally promoting the destination. Induced image is created by the conscious effort of marketers to develop, promote, and advertise a destination. Fakeye and Crompton (1991) added another level to the concept of destination image as "complex image", which is formed when a tourist has a direct experience of a destination.

Echtner and Ritchie (1993) developed a conceptual framework of destination images proposing that (a) a destination image consists of attributes; (b) each of the components contains functional (tangible) and psychological characteristics; and (c) the destination image includes a range of common functional and psychological traits as well as unique features.

Milman and Pizam (1995) argued that destination image consists of the product, the behavior and attitude, and the environment. Gartner (1993) introduced the concept of cognitive, affective, and

conative images as the three components of destination image.

The cognitive component is an evaluation of the known attributes of the product or the understanding of the product by a consumer in an intellectual way. It is the sum of beliefs and attitudes of an object leading to some internally accepted picture of its attributes. Because the cognitive image is formulated from external stimuli based on objective characteristics of the destination, the amount of external stimuli a consumer received on the object is influential in forming a cognitive image.

The affective component refers to the motives a consumer has for an object, in this case, for a destination. What a consumer wishes to obtain from the travel experience in a destination is reflected in the affective image, which in turn will affect the valuation of the destination.

The conative component depends on the cognitive and affective image of a destination and relates to the consumer's behavior as an action arising from the two other components (Gunn, 1989). All three components (cognitive, affective, and conative) are closely related to the destination selection process as suggested by Gartner (1993).

The holiday decision-making process, reviewed later in this chapter, generally involves five steps: becoming aware of a need, searching for information, evaluating alternatives, making a purchase decision, and making a post-purchase evaluation. The selection of a destination occurs in the first three steps, mirroring, to a degree, the three components of destination image. The cognitive image that determines which destinations will move forward into the evaluation pool, is formed in the need awareness and information search stage. The affective image operates in the evaluation of alternative stage; the purchase decision stage then is closely associated with a consumer's conative image.

Goodall (1988) interpreted the concept of image and image formation in relationship to satisfaction and decision-making process and suggested that "mental image" (destination image) is the basis of

the evaluation or selection process. All activities and experiences are evaluated to form a preferential image of an ideal destination, which is further developed into an evaluation image. Influenced by the information available, the consumer will form a naive (factual) image of a destination. If a naive image of a destination shares a level of commonalities with the preferential image, this destination will become one of the alternatives in destination selection.

The naive image will be consequently manipulated during and after the vacation taking place in order to form a destination image (mature); therefore, a consumer's image of a destination does not remain constant but, rather, continues to evolve over time as the person acquires new information and experiences. Only when the destination image of a consumer matches or exceeds the evaluation image formed pre-trip will the consumer become satisfied by the trip experience. Differentiated from the steps in purchase decision making process, the destination image referred here is the present of mental pictures of the destination on each stage. Since the decision making process is liner, mature destination image may include the naive destination image; however, not all aspects of naive image have to appear in the final destination image necessary.

Chon (1990) developed what he calls an "evaluative congruity theory framework" that is similar to Goodall's image theory. This framework incorporated the decision-making process into destination image formation, utilizing the concept of "primary image". The primary image contains the individual traveler's perception of the attractiveness of outcomes related to his/her travel objective and the perceived beliefs and likelihood of accomplishing his/her needs and wants. According to Chon, the construction of primary images of destinations is based on certain "push" and "pull" factors associated with destinations. Push factors relate to different needs a consumer has, while pull factors refer to the attractiveness of the destination. In contrast to the Goodall's "naive image", the primary image can exist in any of the organic, induced, or complex images dimensions because it comes into existence when a destination is selected as a possible choice based on the needs and motivations of

the potential tourist (Lubbe, 1998).

3.1.3 Image Formation Agent

Because a consumer's destination image depends largely on external stimuli (Gunn, 1989), it is essential to understand the nature of these external stimuli. These are also called image formation agents by Gartner (1993). The study on effects of different type of image formation agent on the consumer has a strong applicability to destination marketing because of the intangible nature of services provided by the destination. Kotler, Bowen, and Makens (2003) have classified three sources from where consumers obtain information: personal, commercial, and public sources. Information from personal sources includes family, friends, neighbors, and acquaintances. Commercial sources refer to advertising, salespeople, dealers, packaging, and displays. Public sources feature information such as restaurant reviews, editorials in the travel section, and comments from consumer-rating organizations. This classification is straightforward, albeit rather unsystematic and incomplete.

Based on his destination image theory, Gunn (1989) divided the information a consumer obtains on a destination into organic and induced categories. The main differences between organic and induced information is that induced information is intended to promote the destination with a "pull" function while organic information is rather a neutral reflection of either the travel experience or the destination. Gunn further pointed out that newspapers, periodicals, and books are the general sources for organic information while advertising literature, magazine articles, guidebooks, television promotion, travel tour pages and promotion by travel businesses overtly provide induced information to consumers. This classification is rather simple; however its intention of differentiating information sources by motivation built a foundation for the upcoming classification systems and destination marketing theories (Jenkins, 1999).

Gartner (1993) presented a systematic classification of image-change agents: Overt Induced I, Overt Induced II, Covert Induced I, Covert Induced II, Antonymous, and Unsolicited Organic, Solicited Organic, and Organic agents. Even though some of these adjectives are similar to those used by Gunn, the formation agents in this system are quite different from Gunn's definitions. Because this system is based on the information sources as well as intentions of these information sources, to identify each segments in to the "push" or "pull" factors by Goodall (1988). Among all eight categories, the first four (Overt Induced I/II & Covert Induced I/II) feathers with "pull" factors, while the reseat with "push" factors.

- Overt Induced I agent refers to the traditional forms of advertising through television, radio, brochure, billboards, and print media advertising by destination area promoters with direct attempts to push a particular destination image to perspective visitors. Advertising, traditionally, faces the challenge of low credibility perceived by consumers. (Kotler et al. 2003)

- Overt Induced II agent refers to the information received or requested from tour operators, wholesalers, and organizations that have a vested interest in the travel decision process but not directly associated with a particular destination. Tour operators and wholesalers may portray and delivery unrealistic images to the consumer because of their business interest in profit; destination promoters should be aware of the potential risk and be caution in order to successfully promote a realistic destination image.

- Convert Induced I agent refers to the use of a recognizable spokesperson; this agent is intended to overcome the credibility problem inherent in Overt Induced I agents. Using a celebrity spokesperson increases message recall especially when the celebrity is identified and the brand name is mentioned early in the advertisement. An endorsement from a satisfied customer is another form of this agent if choosing a celebrity is not possible.

- Covert Induced II agent refers to articles, reports, or stories where the consumer is unaware of the promotional effort behind these pieces. One example is articles published by travel writers who were invited and funded by the DMO or tourism enterprises in a destination.

- Autonomous agents consist of independently produced reports, documentaries, moves, and news articles; all above sources are either belong to news or popular culture category. The study of tourism image changes for the People's Republic of China resulting from media coverage of the Tiananmen Square Event (Gartner & Shen, 1992), illustrate the importance of news on consumer perception. Gartner (1993) event stated that "news and popular culture . . . . .may be the only image formation agents capable of changing an area's image dramatically in a short period of time" (p. 203).

- Unsolicited Organic agent is the not requested information received from individuals who have been to the destination or who believe they have the knowledge of the destination. A person without a fully developed image of a destination may be heavily influenced by this kind of information.

- Solicited organic agent refers to information requested by the consumer from other individuals, particularly respected sources such as family, friends, and opinion leaders. This type of agent will influence the holiday decision of the consumer more than unsolicited organic agents.

- Organic agent simply refers to information acquired during a trip to the destination by the consumer, thus the organic image formation has the highest credibility.

Several factors will alter the promoters' decision when choosing the right image formation agents to form a strategic image position channel. Budget and timing are usually the first considerations. Apart from obvious factors, the characteristics of the target market should be researched in order to build a solid foundation for image creation and delivery. This usually takes the form of a

demographic profile of the target market, travel motive research, and destination attributes profiles. In addition, understanding the product or service offering and its projected image currently in the consumer's mind is essential.

3.1.4 The Importance of Destination Image

The creation, promotion, and incorporation of a proper destination image have become an essential segment of a destination marketing strategy. This is because destination image influences both the tourism decision-making process and the consumer satisfaction/dissatisfaction.

<u>To prospective travelers</u>

Destination image is widely recognized as an important factor in the decision-making process for prospective and first time travelers while still in the anticipation stage of destination selection (Chon, 1990; Echtner & Ritchie, 1991). Tourism products are generally considered intangible because they cannot be pre-examined or sampled. Further, once the service is delivered, returning the unsatisfied product becomes impossible, which requires a trust component in the pre-visit destination image. A potential tourist inevitably invokes a degree of trust when making the decision to purchase a tourism service.

Prospective visitors frequently have limited knowledge about a destination from promotions by the destination, travel guides, travel journals, books, general media publicity, and word-of-mouth (Um & Crompton, 1992). The cumulative impression of this information on a potential visitor is the image of that certain destination held by the visitor. This influences key elements of a purchase decision, such as whether to visit and when to visit. "Images are of paramount importance because they transpose representation of an area into the potential tourist's mind and give him or her pre-taste of the destination." (Fakeye & Crompton, 1991, p. 10) This explains why tourism marketing professionals focus so much on the issue of creating and promoting a certain destination image.

However, this image of a potential tourist on a tourism destination may not reflect a valid image of that destination. A mismatch between perception and reality can influence the level of satisfaction of the tourist once he or she is on-site. Whynne-Hammond (1985) found that perceptions of foreign countries and their inhabitants may be wildly inaccurate yet still heavily influence the purchasing decision-making process of the first time visitors. To delivery positive, motivational, yet accurate destination image to potential tourists is a priority on a destination marketing organization's agenda.

<u>To first time and repeat travelers</u>

Destination image also influence the levels of satisfaction regarding the tourist experience (Chon, 1992), which will further influence the decision-making process for the second trip.

Based on Chon's framework (1990), Bigne, Sanchez, and Sanchez (2001) examined the role of destination image in tourism as related to an individual tourist's satisfaction/dissatisfaction. The findings clearly indicate that a tourist's satisfaction/dissatisfaction is correlated to the evaluative congruity of an individual tourist's pre-visit expectations of a destination and performance outcome perceptions. Their data support Chon's findings, and further suggest a sequence of image, quality, satisfaction, and post-purchase respectively.

Also based on Chon's framework, a study on primary images as a dimension of destination image was carried out by Lubbe (1998). The study result shows that potential tourist could be placed on a continuum indicating a "push" or "pull" orientation when constructing primary image of destination. Also, in the same tourism-generating country, these "push" and "pull" factors can differ substantially between various identified segments and that cultural context is an important determinant of these differences.

Destination perceptions change during the course of a consumer's vacation (Vogt & Andereck, 2003). The assessment of a destination's desirability typically is fairly high at the beginning of a

vacation and increases only slightly later despite the previous experiences or length of the grip. This study also suggests that knowledge is an easier state to influence during the course of a vacation than is desirability. Vacationing significantly enhances knowledge about a destination; first time visitors had a larger change in knowledge improvement compared to repeat visitors.

To the same destination, prospective, first-time, and repeat visitors obtain significantly different destination images. Based on the three dimensions of destination image theory, Fakaye and Crompton (1991) conducted a study on the different destination images held by visitors with various experiences shows that informative promotion was likely to be most effective at the organic image stage, persuasive promotion most critical at the induced image stage, and reminding promotion most useful at the complex image stage.

3.1.5 Assessment of Destination Image

Having understood the importance of the destination image and its implication in destination marketing field, the next logical question is how to assess destination image that is currently held by the consumer. Studies on destination image can take different forms and be conducted from different perspectives (Pike, 2002). The study can be designed to focus on potential visitors, actual visitors, other groups of people, or even travel intermediaries; the study can involve single destination, two destinations, or multiple destinations. The study can take either the demand (consumer/visitors) perspective, the supply (DMO/tour operator) perspective, or analyze the gap between images from the two perspectives. This section will summarize research on the assessment of destination images.

Studies on single destination image assessment are very popular in the tourism research, especially at the level of an entire country (Pike, 2002). However, assessing the image of a nation can be problematic because of the large area the destination image covers. Most studies utilize quantitative research methods in examining destination attributes, motivations, or even purchase behavior, rather

than specifically researching perceptions or images.

A good example of such studies is done by Bignon et al. (1998) on the French perceptions and image of United States. This study was based on the secondary data collected by Market Facts of Canada Limited for the United States Travel and tourism Administration (USTTA) and Tourism Canada in 1989. Even though named as image dimensions, the study analyzed factors in five different categories of travel attributes (Adventure, Entertainment, Outdoors, Value, and Culture). This study included French consumers with and without previous travel experience to United States; however, these two groups were not separated or compared with their results. Even though the authors acknowledge the simplicity of this analysis, it still provides salient insights into the linkage between destination image and choice of French travelers concerning the U.S. vacation market.

Chen and Hsu (2000) researched Korean tourists' perceived images on multiple overseas destinations. This study examines the demographic profile of the Korean tourists. The images of different destinations were examined through images attributes and a comparison between these destinations is carried out later. Compare with the single destination image study such as Bignon et al's (1998), this kind of image study will provide more meaningful information to tourism marketing practitioners in better promoting and communicating the destination image to potential customers.

Destination image can also be examined through the course of a vacation, such as Chaudhary's study (2000) on foreign tourists' pre- and post-trip perceptions of India. With a survey as the research method, the study successfully identified strengths and weaknesses of India's tourism-related image, thus pointing out efforts needed to ensure the tourists' expectations are met. The method of this kind of study is quite straightforward and simple; the result of the study can contribute to local tourism development efficiently.

Rather than focusing on individuals, either the visitor or the consumer, Dimanche and Moody

(1998) carried out a study on the destination image of Latin American intermediary travel buyers of New Orleans. Travel intermediaries are an essential element of tourism distribution channels and they act as facilitators and opinion leaders to significantly influence international travel. Similar to individual consumers, travel buyers' destination images can be improved through promotional efforts; however, rather than advertising or publications, a buyer's destination image is greatly influenced by trade shows, which also features as the better communication channel between buyers and sellers.

With respect to matching images from supply and demand perspectives, Andreu, Bigne, and Cooper (2000) conducted a study of projected and perceived images for British travelers to Spain. This study features a mixed method design of studying projected image by content analysis and perceived image by surveys. It identified a gap between the two dimensions of the image, and further suggested marketing solutions in order to fulfill this gap. This fairly new research approach is unique and often rare in tourism practice, but possible in the academic literature.

3.2 Tourism Destination Branding/Position

The study of brand/position in the hospitality and tourism industry has a fairly short history transferred and adopted from the marketing literature. Yet, most studies are concentrated on the marketing and management perspective of creating, maintaining, and redefining a brand in the private sectors of hotel, airline, car rental companies, theme parks, and cruise lines (Chang & Yeh, 2001; Driver, 1999; McDonald, Harris & Chernatony, 2000; Oppermann, 1999).

Airlines are an excellent example of almost industry-wide use of the company name as a brand, such as WestJet. National flag carriers, such as Air Canada, face the challenge of creating and maintaining a brand that has distinctive characteristics essentially derived from a national culture and which signify other attributes shaped by a corporate culture (Driver, 1999). Other sectors of the industry features a numbers of excellent examples of successfully created and maintained brands

including "Hertz," "National Car Rental," "Six Flags," "Carnival," and "Royal Caribbean Cruise Line."

Compared to the airline industry, fewer brands in the tourism industry were created due to the less tangible nature of the products provided. Tow successfully branding companies (with associated taglines) are "Trafalgar' as the "World's favorite touring company" (Trafalgar, 2005) and "Contiki" as "Worldwide travel for 18-38 year olds" (Contiki, 2005).

Above examples are at the micro level concentrated on one specific business in a specific sector of the hospitality and tourism industry. Destination branding/position is at the macro level targeting travelers for the purpose of increasing awareness and create positive attitude toward the destination (Ritchie & Ritchie, 1998). Destination promotion is usually carried out by the Destination Marketing Organizations (DMO) and it should be a collective effort of many partners of the community, sometimes not just the hospitality and tourism businesses in that region (Palmer & Bejou, 1995). Traditionally, DMOs are playing a facilitator's role, rather than intermediaries, with no intention to promote individual products and services, rather the overall image of the destination.

This makes successful branding of a destination especially challenging because no single entity has complete control over the brand or the delivery of the tourism experience of visitors to the destination. The very nature of tourism involves multiple services, many of which are provided by enterprises with their own, competing brands.

Creating a brand that embraces every aspect of the destination is a highly difficult task, especially in the fast changing competitive environment of tourism. However, this should not be the reason to overlook destination brand and branding's function in destination marketing, or neglect the study of destination branding.

3.2.1 Definitions of Destination Brand and Branding/Position

Williams and Palmer (1999) defined the destination brand as "a combination of the images projected by the organization; and those image received by the consumer, which are ultimately shaped by the consumer's previous attitudes, knowledge and experiences," which is a close simulation of destination image definition. Even though the word "branding" or "position" appears in the destination marketing literature, there are no apparent efforts to distinguish between formation of a destination image and the branding of it (Ritchie & Ritchie, 1998). However, it is important to understand that destination image is not destination brand (Cai, 2002).

Based on the American Marketing Association definition of "brand", Ritchie and Ritchie (1998: P17) defined destination brand as:

"A name, symbol, logo, word mark or other graphic that both identifies and differentiates the destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination; it also serves to consolidate and reinforce the recollection of pleasurable memories of the destination experiences."

This definition reflects a strong marketing perspective incorporating the unique intangible nature of tourism products and services.

Generally, branding refers to the creation and delivery of a product brand. Branding can be understood as simple as a step-by-step process of choosing the name, finding the competitive advantage, associating benefit to consumers, addressing different audiences differently, creating a logo, relying on market research, and protecting the name legally (Marconi, 2000). It can also be interpreted as deep as "the terminal phase of a process that involves the company's resources and all of its functions, focusing them on single strategic intent: creating a difference" (Kapferer, 2001).

Based on Ritchie and Ritchie's destination brand definition (1998), through further research, Blain, Levy, and Ritchie (2005: p.331) redefined destination branding as:

the set of marketing activities that (1) support the creation of a name, symbol, logo, word mark or other graphic that readily identifies and differentiates a destination; that (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that (3) serve to consolidate and reinforce the emotional connection between the visitors and the destination; and that (4) reduce consumer search costs and perceived risk. Collectively, there activities serve to create a destination image that positively influences consumer destination choice.

3.2.2 The Nature of Destination Brand

From Blain et al's definition of destination branding (2005), one can reveal the objectives of destination branding process are: 1) to support brand creation; 2) to promote competitive travel image of a destination; 3) to reach and maintain the emotional connection with the consumer; and 4) to provide easy access of the destination information through searching. Blain et al's theory originated from Hankinson's study in 2004.

Hankinson (2004) proposed a framework building around the concept of brand networks; destination brand in this framework performs four main functions as: 1) brands as communicators and "represent a mark of ownership, an a means of product differentiation manifested in legally protected names, logos, and trademarks"; 2) brands as perceptually entities and "which appeal to the consumer senses, reasons, and emotions"; 3) brands as value enhancers, with relation to brand equity; and 4) brands as relationships, where the brand is constructed as having a personally which enables it to form a relations with the consumer.

Based on Hankinson's framework (2004), Blain et al. (2005) carried out a study on destination branding in relationship to DMOs operations. This study employed quantitative method with designed surveys for DMOs. The result suggests that many destination marketing organizations have a general understanding of destination branding and are practicing it to a certain extent; however more effort should be contributed to further understanding the importance, nature, and operational

methods of destination branding.

Applying this framework to tourism destination marketing, challenges occur: to define or legally protect a destination brand name is rather difficult because the brand name may be shared by the destination and local tourism enterprises and to build a brand name which can represent a collective products and services offered in that destination is rather difficult. These challenges are also recognized by Cai (2002) and Palmer and Bejou (1995).

Ritchie and Ritchie (1998) indicated the secondary roles of a destination brand. Destination brand can become a revenue generator from clothing and memorabilia sales, which sometimes leads to issues of authenticity and logo rights. A destination brand can serve as a coordinating symbol for a broad range of community development and promotion efforts. To promote a destination co-coordinately requires a highly coordination and understanding of every government agencies and organizations in the community; this can become a great barrier to effective branding.

Cai (2002) delineated both destination image and branding concepts and proposed a conceptual model of destination branding which placed brand identity in a "core" surrounded by brand element mix, attributes component, affective component, attitudes component, brand image building, marketing programs, marketing communications, and marketing secondary associations. The model is founded on the spreading activation theory and extended from the image formation process framework. In his research, Cai (2002) later tested on the case of brand identity of "old West". This research utilized multidimensional scaling; the result indicates that it is important to build stronger linkages of the image to the brand identity and more favorable affective and attitudes-based brand association for a region than for individual communities.

3.2.3 Delivery of Destination Brand

Despite the challenges a DMO faces on creating an unique competitive image of a destination from a

variety of destination attributes, to promote the destination brand successfully with limited budget contributed by tourism enterprises and/or government agencies or organizations is rather difficult too (Buhalis, 2000; Hall, 1999; Palmer and Bejou, 1995). Designing a cost efficient promotional mix is a challenging task due to the diversity of tourism suppliers operated in the destination, and the spread of consumers in the market place which is more problematic in tourism destination promotion than in the general marketing field (Buhalis, 2000). To market a destination as a domestic and international tourism icon, the target market of such promotion can be all consumers throughout the world and a great part of the general marketing field is focusing on one or several target markets instead of all consumers in a whole.

Considering strategically marketing a destination, such as a country, Riege and Perry (1998) stated that there are three approaches as: the traditional consumer-oriented approach, the competition-oriented approach, and the trade-oriented approach. The most popular destination marketing strategy adopts the consumer-oriented approach; this approach can either focus on an undifferentiated marketing strategy on the full product to cover all the market, or a differentiated marketing strategy focusing on the product specialization, market specialization in either the specialized or the overall market. The competition-oriented strategy is objected to develop, maintain, or defend the position of an organization. Compared to the consumer-oriented approach, competition-oriented approach is more aggressive in differentiating and promoting itself to consumer.

Sometimes, the strategy adopted can be as aggressive as the attacking the competitors, which is not commonly seen in the destination marketing industry. This is probably because the promoters intended to maintain a high level of friendliness as it is an important criteria the destination selection process; attacking the competitor on mass media is probably not the best way to convey the destination friendliness. Finally, the trade-oriented approach, emphasizing on the involvement of intermediaries, is adopting either the by-passing strategy (totally relinquish any collaboration), co-

operation strategy (a vertical co-operation through information distribution channel), and adoption strategy (a passive response only upon request in the distribution channel).

Among the three approaches, consumer-oriented approach and the trade-oriented approach are all quite popular in destination marketing; while the first approach is focusing on the customer, thus features many mess advertising strategies through traditional advertising agents (TV, radio, and internet lately), the latter approach utilized travel trade intermediaries in distributing traditional marketing materials such as the brochures and travel maps.

Buhalis (2000) identified promotional activity, such as advertising on television, radio, and press, as well as using posters campaigns as the "above the line" promotion, which is the strategy under Riege and Perry's theory on consumer-oriented approach. Even though above the line advertisement is expensive, it assists the development of the destination brand as well as attracting a large number of visitors coming for vacation (Bonham & Mak, 1996).

Advertising functions to enhance physical attributes and their relative importance to the consumer. Through advertising, a destination could either change the way in which consumers evaluate the destination, or change consumer's perceptions of the destination on the present set of evaluation criteria. However, promotional campaign is likely to succeed only if it brings information to people about attributes of which they are not aware of which they have a distorted view (Crompton, 1979). As Crockett and Wood (1999, p.282) stated:

> *While word of mouth advertising plays an important part in the promotion of a holiday destination, it is consumer awareness created through marketing and communication campaigns, supported by appropriate collateral, which is the key to increasing awareness levels of a destination in its core markets.*

In contrast of the above the line advertisement, Buhalis (2000) described the "below the line" promotion techniques as marketing material distributions through intermediaries and public relations

with those intermediaries, which is close aligned with Riege and Perry's theory of trade-oriented approach (1998). The most utilized marketing materials are brochures, guidebooks, and tourism maps.

Brochures, as an important information source, are one of the major channels in below the line promotion; this kind of promotion usually shows local attractions and activities, as well as featuring a number of local suppliers such as hotels, entertainment and catering enterprises. Brochures are a form of promotional travel text which amplifies the exotic nature of destinations (Lew, 1991); brochures are also unique in design, distribution and marketing usage (Zhou, 1997). The attitude on the effect of brochures on marketing promotion is mixed based on controversial study results. Zhou concluded that brochures exert a great influence on travel decision for never-visited consumer; while Young (1999) found that destination image based more on previous travel experiences, social-cultural characteristics, and personal preference. Never-the-less, brochures are still commonly adopted in tourism marketing, especially in destination marketing.

3.2.4 Assessment of Destination Brand

What is a good destination brand and how well has it performed are often asked by destination marketing professionals because of their close association with marketing performance of the destination promotion; these two questions are very much related. A good destination brand should feature a number of attributes that are perceived to be important among all the tourism attributes of a destination. A well performed destination brand should show a high performance on each of the important attributes; and finally a good performance of the destination brand is at least a partial evidence of the creation of a good brand name.

Sevier (2005) indicates that the two essential components of an effective brand are the awareness and the relevance. Thus, a simplified measurement on the destination brand performance can be

created. An effective branding will have to make a consumer first notice the brand, differentiate the brand from others, and finally acknowledge the method of reaching or searching for the brand product. Therefore, in order to assess the awareness component, the rate of consumer noticing the brand, the rate of consumer able to clearly differentiate the brand, and the rate of consumer actually searching for further information can all reflect the awareness component of the brand performance. These measures are sometimes referred to as "conversion methods".

To assessing the relevance of the brand, questions asked are based on consumer's emotional involvement with the brand message; questions include the possibility of a brand message fulfill a consumer's need; the likeliness of this message building on the previous message; the likeliness of this message as foundation for further message and the successful rate of building a relationship with the consumer. The challenge of this system is that it is highly abbreviated, offering only a foundation for a more developed system.

One of the most recognized brand assessment methods in the marketing field is the Young & Rubicam's Brand Asset Valuator created by the global advertising agency Young & Rubicam (Aaker, 1996). The "valuator" uses a thirty-two item questionnaire including five sets of measurements on brand personality, differentiation, relevance, esteem, and knowledge to assess the successfulness of the brand. In addition, brand strength is calculated by multiplying differentiation to relevance based on the logic that a brand can only be strong with strong differentiation and relevance components. Multiplying the esteem and knowledge, brand stature is created; brand names are ranked in the six dimensions mentioned above (differentiation, relevance, strength, esteem, knowledge, and stature).

Based on his study of the Young & Rubican's Brand Asset Valuator, Total Research, and Interbrand, Aaker (1996) suggested a measurement system of ten components in the brand equity titled as the Brand Equity Ten. These ten measurements are divided into five categories as:

- Loyalty Measures—Price Premium; Satisfaction/loyalty

- Perceived Quality/Leadership Measures—Perceived Quality; Leadership popularity

- Associations/Differentiation Measures—Perceived Value; Brand Personality; Organizational Associations

- Awareness Measure—Brand Awareness

- Market Behavior Measures—Market Share; Market Price and Distribution Coverage.

This set of measures is well recognized in the academic world, especially among marketing researchers, even though the system is complicated with many problems toward each system (Barth, Clement, Foster, & Kasznik, 1998; Capron, 1999; Johanson, Martensson, & Skoog, 2001; Koszegi & Rabin, in press; McAlexander, Schouten, & Koenig, 2002; Ritchie & Ritchie, 1998). The commonality of all of the above measurement is that these are designed for the purpose of general business sectors. Their applicability to tourism, especially in destination branding, is limited. Despite the long history of branding and measurement theory development in the marketing field, little has been done on the branding measurement of destination image in the tourism industry. After all, the importance of branding and positing on a destination only recently started to attract tourism researchers' attention (TTRA, 1998).

During the International Travel and Tourism Research Association Conference in 1998, a more-defined measurement, with a focus of destination branding, is proposed by Ritchie and Ritchie (1998). They based their approach on the selection and recollection roles of branding and its effect on a consumer's tourism behavior. Ten measurements were divided into pre- and post-experience categories because destination branding assists in destination selection as well as enhances recollection.

Before a vacation is taken, the overall measurement of the performance is will be simply the extent to which the destination is chosen over others. However, through the consumer decision making

process, a number of measurements are created:

- The degree of recognition/association

- Lack of confusion with other destinations

- Lack of confusion with other products/services

- The extent to which brand generates a desire to visit the destination

- The intensity of the desire to visit that the brand generates

- The nature and importance of the specific benefits the visitor expects to realize for the destination experiences

- The extent to which the brand provides a "cloud of comfort" for the visitor—a felling that all is, or will go well during the destination visit.

After a vacation has taken place, the emphasis of the destination branding shifts to assisting the consumer to easily recall the tourism experience, creating a warm and friendly memory of the destination and the experiences, and promoting the idea that return to the destination is a sound decision. Thus, a number of measurements are created:

- The ease, frequency, and strength of the recall of the destination experience

- The extent to which the brand helps create memories of the destination and the visitor's experiences

- The intensity or warmth of memories elicited

- The degree of conform provided that the future/current choice was/is a sound one

- The ability of the brand to serve as a catalyst to tie together the many 'bits' of memory of the destination experience

- The ability of the brand to "cement" the consolidated memory of the destination experiences.

- In this system, the measurements are associated with the role of destination branding in

different stage of a consumer's decision making process which has a strong applicability on

destination branding assessment

    This chapter provided review of literatures on destination image and destination branding/position. Even though the literature of destination branding/position is derived from the literature of the literatures on destination image, destination branding/position discussed theories and studies from the destination promoters' point of view, while the selection of destination image literatures in this study discussed theories and studies from the tourists' point of view. The literature review reflects the nature of this study—a product-market match. The next chapter explained the research method of this study in detail.

Chapter 4 Research Methods

The study of destination image and destination branding/position, which is derived from the study of destination image, is the foundation of destination promotion. Studies of image can be done from either the consumer's perspective or the destination promoter's perspective (Andreu et al, 2000; Kotler et al. 2003). Because Canada still does not have approved destination status (ADS) from Chinese government and there had been no direct promotion of tourism in Canada in Mainland China, it is likely that most Chinese citizens have a vague or imprecise image of Canada, although this is not known for certain. Market research on the consumer destination image study in this market is needed to help Canada prepare for the possible opportunities and challenges presented by ADS should it be granted. Restrained by the "no mass media advertisement before ADS" policy, there has been no direct promotion on Canada appearing in the Chinese outbound tourism market; thus studying the perceived image of Canada through advertising is challenging. However, such studies are all serving the same purposes—to detect the gap, if exists, between the supply and demand sides of the market (product-market match).

4.1 Research Design

This objective of this research was to assess the coherence and/or differences between the perceived destination images of Canada by potential Mainland Chinese consumers to, the other hand, the marketing position of Canada by Canadian Tourism Commission and its partners if ADS is granted– in effect, to conduct a product-market match between two concepts. The research model was designed based on the research purpose of this study, as presented in Figure 4.1 Research Model.

Figure 4.1 Research Model
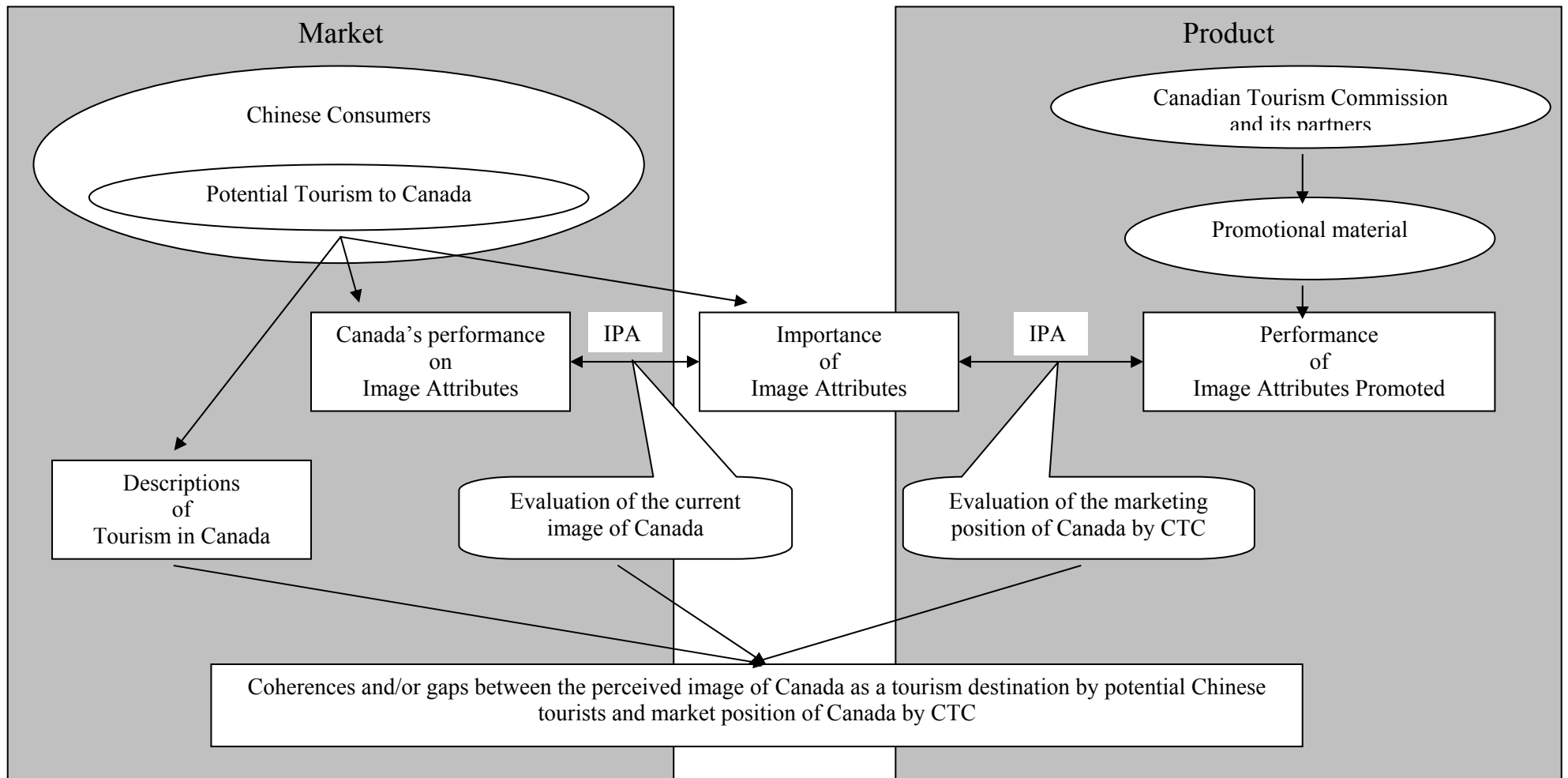
This research model incorporated both the market side and product side of the Mainland Chinese outbound tourism market, as they were placed at either ends. Target market (potential tourists) and promoter (CTC in co-operation with partners) were identified by ovals. As a part of Chinese consumers, potential Mainland Chinese tourists, identified through research question one, two, and three (Section 1.1) were surveyed to assess their image of Canada as a tourism destination; the assessment included descriptions of tourism in Canada, the importance of selected tourism attributes, and their impressions of Canada's performance on these attributes. As well, their preferred trip attributes for potential Canadian tourism visit were studied to illustrate a more complete picture of mainland Chinese' perceptions of and interest in Canada.

From the supply side, CTC in co-operation with its partners carries promotional materials in their China Division (Beijing, China), primarily brochures. Brochures collected from CTC China Division at the time of this study were examined to identify the performance of attributes being promoted through the brochures.

Based on the studies taking place on both sides, an importance and performance analysis was conducted to identify evaluation of the current image of tourism in Canada held by potential Chinese tourists without mass media promotion. The second importance and performance analysis, between the importance of image attributes and the performance of proposed image attributes, reflected the evaluation of the proposed image of tourism in Canada presented by CTC and its partners through brochures. In collaboration with the description of tourism in Canada, the two evaluations and the comparison between them illustrated the coherences and/or gaps between the perceived images of Canada as a tourism destination held by potential Chinese tourists, to the other hand, proposed image of Canada presented by CTC with its partners.

Thus, three stages of research were carried out as:

1. To conduct a self administrated questionnaire of potential tourists to obtain preferences and perceptions of Canada, acquiring evaluation of importance of tourism attributes, performances of tourism in Canada, description of tourism in Canada and preferred service from Canada tourism companies.

2. To conduct content analysis on the promotional materials obtained from CTC China Division on the performance of image attributes reflected in the promotional materials.

3. To analyze the product-market match based on results from previous stages.

4.2 Adaptation of Importance and Performance Analysis in this study

The purpose of this study was to discover the product-market match between the perceived and proposed image of Canada that might have marketing implications for Canadian tourism promotion in China. Derived from national image of Canada, the tourism image of Canada was constructed on the general knowledge of some tourism attractions obtained from various of sources, such as friends and relatives living in Canada, with very little of direct promotion in China because of the lack of ADS. The difficulty of comparing the current perceived image of Canada (among potential Chinese tourists) to the proposed image of Canada was self-explanatory because of the potentially large number of characteristics involved in the definition of image study. However, it was much more effective to resolve the question by comparing the image attributes that most likely lead to a purchase decision, which is precisely the purpose of this study.

The nature of this research determined the adoption of "importance and performance analysis" (IPA) method. One may question, since Canada has not yet been recognized officially as an approved outbound tourism destination by China, whether any performance analysis is possible based on the image of Canada as a tourism destination. The answer is confirmative because even without ADS,

destination images of Canada among Chinese citizens still exist though it may not featured great differences between the national images of Canada. A comparison between the importance of a desirable tourism destination and perceive image of Canada would therefore provide marketing insights of the Chinese market to fulfill the research purpose; therefore, the IPA method was adopted in this study. Even though importance in product choices is inappropriate in a post-purchase situation, it is appropriate to understand consumer's pre-purchase perception (Oh, 2001), which was in alignment with this study.

4.2.1 Importance and performance analysis (IPA)

The technique of importance and performance analysis was introduced 30 years ago by Martilla and James (1977) to interpret the service quality in automobile industry. A three-step research system features the generation of important attributes by researchers, the evaluating of these attributes on importance and performance individually by the consumers on a scale, and the interpretation of the relationship between importance and performance on a four quadrants grid as the final step. The x-axis represents the performance scale and the y-axis represents the importance scale; the mean of performance represents the x value of an attribute, while the mean of importance represents the y value. Therefore, one attribute can be plotted on the grid, along with other attributes. The cross-hair or the lines dividing the four quadrants are created by either the scale mean or the mean of all attributes importance and performance, which formed an interpretative grid as presented in Figure 4.2 Importance and Performance Grid.

Figure 4.1 Importance and Performance Grid

Quadrant I **Needs Improvement** High Importance/Low Performance	Quadrant II **Maintain Good Work** High Importance/High Performance
Quadrant III **Low Priority** Low Importance/Low Performance	Quadrant IV **Reduce Attention** Low Importance/High Performance

Importance (vertical axis label)

Performance

Source: Adapted from Evans and Chon (1989), Martin (1995), Go, & Zhang (1997), and Kwan (2005)

Among four quadrants, if most attributes are concentrated in "Maintain Good Work" or "Low Priority", Canadian destination marketers should not worry too much because the performance is congruent to importance. However, if the concentration is in "Needs Improvement", more promotions should be contributed to those attributes falling in the Quadrant I in order to meet their priorities. If the concentration is in "Reduce Attention", which means Chinese tourists perceive certain attributes more attractive however they value it with low importance, further promotions should be derived from these attributes. IPA had been well established in tourism research. The research on the visitor satisfaction (Tarrant & Smith, 2002), service improvement (Feng & Jeng, 2005), and service quality measurement (Hudson, Hudson, & Miller, 2004) all adopted IPA. Studies on perceptions and images also utilized this technique as O'Leary and Deegan's study on Ireland's

image as a tourism destination (2005) and Ryan and Huyton's study on tourists' perception (2001).

4.2.2 Criticism of Importance and performance analysis

Despite its use in tourism, IPA has been criticized by some authors. For example, there is some debate about how to define attribute importance. It is noted from previous studies the definition of attribute importance is multidimensional (Oh, 2001). Those attributes important to a purchase decision are commonly evaluated better than their actual performance; such attributes are sometimes titled as salient attributes. Attributes that a person actively seeks from a tourism service or a destination appeared to be more importance than the rest of attribute to be evaluated; these attributes are identified as goal-oriented attributes according to Jaccard and Wood (1986). In addition, different users understand the importance of an attribute differently, which further complicates the definition of importance. The fact that each respondent's subjective condition can alter how the importance of an attribute is evaluated is obvious to importance and performance analysis. With the concern of great variance between respondents, standard error was incorporated into a traditional IPA grid (Tarrant & Smith, 2000); the standard error of importance and performance were added or subtracted from its mean accordingly, which then form a square of area on the grid instead of a dot representing one attribute. Attributes with great variance showed their squares crossing the quadrants, which request interpretation with caution. This method basically graphically interpreted the degree of variances of each attribute on an IPA grid, which is an improvement from the traditional IPA grid with a table of standard error at side. This study adopted the traditional method because the large number of attributes selected resulted in confusing grids with standard error displayed (Appendix A IPA Grid with Standard Error).

The attributes evaluated through traditional qualitative studies were generated usually from the literature reviews of previous studies. Limited by research resources, the considered more important attributes or attributes associated with a certain destination were usually selected, which limited the

true reflection of importance on the attributes. Pritchard and Havitz (2006) adopted a qualitative approach of content and typicality analysis to generate importance and performance data to avoid these biases. The relationship of the importance and performance are later in interpretation through IPA grid. Though the result of the qualitative IPA is in aligning with the traditional IPA grid, this approach allowed the manager to interpret consumer's satisfaction in both numbers and statements, which lead to greater insights for marketing implication. The qualitative IPA had introduced method of generating importance based on qualitative data provided by the respondents through open-ended questions based on their experience of services. The nature of Pritchard and Havitz's research is a post-service evaluation required a large amount of input from respondents. Potential Chinese tourists only obtain a positive image of Canada with very limited knowledge of specific tourism attributes, which would lead to difficulties in marketing applications on specific tourism attributes in this research. Therefore, the qualitative importance performance analysis was not implemented in the design of this research.

The potential relationship between importance and performance inspire variations of the analysis results. Previous studies have shown a high degree of correlation between two (Oh, 2001), some as high with r = 0.78; this issue had existed since IPA had been introduced, which illustrate the issue of influential effect between the importance and performance scores. To minimize the influential effect, Mount (2000) recommended modifying IPA by applying confidence intervals to the grid, which distinguished the "significant" attributes that requires attention and "other" attributes which arguably requires attention from the traditional visual interpretation. Though no data was provided for precise correlation statistics from previous studies, the grid presented by Hudson et al. (2004) showed a strong linear relationship between the attributes; same high level of linear relationship exist in the grid presented by Feng and Jeng (2005).

The cross-hair placement had always been an issue of IPA. The scale mid-point versus the

response mean has been discussed in almost every methodological study on IPA, even though researchers tend to adopt the response mean more frequently. Oh (2000:625) argued, "the scale means to be used as the cross-hair point when constructing the IPA grid and the using actual means be viewed as a special case extended of the comparison based on the scale mean". The scale mean cross-hair reflects the performance evaluation to importance based on the perception of the respondents; the actual mean cross-hair presents relative importance and performance comparison among all attributes. In adopting the technique of IPA, an IPA study had carefully designed for the most accurate interpretation, starting at the attribute generation stage in the questionnaire design.

4.3 Self-Administered Questionnaire

To examine the current image of Canada as a tourism destination held by potential Chinese tourists, a self-administered questionnaire was designed. Smith (1996) stated that questionnaire has the benefit of reaching a large sample size with relatively lower cost with a better quality response on evaluation of long list of items; considered the research purpose and limited resources, an anonymous self-administered questionnaire was deemed most suitable for the detect the tourism image of Canada obtained by potential Chinese tourists and trip attributes of Canadian tourism products (Appendix B). Some of the reasons for choosing a questionnaire included: (1) it permitted the simultaneous collection of data from a geographically dispersed set of respondents; (2) it was more cost-efficient than arranging personal interviews; (3) surveys contained uniformity as the same questions were asked and the same responses were provided.

4.3.1 Design of the Questionnaire

The questionnaire contained five categories of questions as in Table 4.1 Survey Questions. Questions on previous travel experiences and interest in Canada were presented in Section I of the questionnaire. Section II and III required importance and performance rating of a list of 32 attributes

generated from previous studies. Section IV featured single and multiple choice questions for the trip preferences, and the last section required participants' social and demographic information.

Table 4.1 Survey Questions

Section I and II	Questions
Trip Characteristics	Whether have outbound travel experience; Purpose of the visit; Whether have planed to travel outbound, Travel purpose; Country to visit; Intention on visiting Canada; Whether consider Canada for future vacation and why not
Importance of Destination Attributes (From Previous Literatures)	Travel Issues: Personal safety; outstanding scenery; ease of obtaining a visitor visa; expenses traveling in the country; expenses traveling to the country; standards of hygiene and cleanliness; environmental quality of air, water, and soil, non-stop flights from China, mandarin as widely spoken language, presence of Chinese in the country. Tourism Attractions: small towns and villages; wilderness and undisturbed areas; beaches for swimming and sunning; local cuisine; museums and art galleries; chances to see wildlife and birds one does not usually seen; local crafts; historical, archaeological, or military sites; local festivals; mountainous areas; shopping; big modern cities; amusement or theme parks; whale watching; nightlife and entertainment; wineries; skiing; golf; visiting casinos and gambling

Table 4.1 Survey Questions

Section III and IV	Questions
Performance of Canadian Attributes (From Previous Literatures)	Travel Issues: Personal safety in Canada; Canadian scenery; ease of obtaining a visitor visa from Canada; expenses traveling in Canada; expenses traveling to Canada; standards of hygiene and cleanliness in Canada; environmental quality of air, water, and soil in Canada; non-stop flights to Canada, mandarin speaking environment in Canada, presence of Chinese in Canada.
	Tourism Attractions: small towns and villages; wilderness and undisturbed areas; beaches for swimming and sunning; local cuisine; museums and art galleries; chances to see wildlife and birds one does not usually seen; local crafts; historical, archaeological, or military sites; local festivals; mountainous areas; shopping; big modern cities; amusement or theme parks; whale watching; nightlife and entertainment; wineries; skiing; golf; visiting casinos and gambling
Preferred Trip Attributes	Visiting seasons; Preferences for individual versus group travel; Types of tours and activities preferred; Types of accommodation, food, transportation preferred; Preferred pace of the tour; Preferred types of sights; Travel budgets; Preferred sources of information

Table 4.1 Survey Questions

Section VI	Questions
Socio-Demographic Information	Age, Gender, Education, Income, Marital status

The magnitude of attribute selection, as a crucial step in importance performance analysis, was undoubtedly because of its serious implication on the validity and precision of the analysis (Crompton, Fakeye, & Lue, 1992; Oh, 2001). Pike (2003) illustrated that most of the structured studied relied on the supply-side generation of attribute lists; and the most common method of attribute selection were literature review, content analysis of brochures, and interviews with practitioners. For the purpose of this study, a combination of supply-side generation of attribute lists and literature reviews was adopted.

A list of attributes was generated by reviewing Canadian Tourism Attitude and Motivation Survey (CTMAS) (1983) and Tourism Attitude and Motivation Survey (TAMS) (2004), as well as previous works as Bignon et al, (1998), Hu & Ritchie (1993) and Chen & Hsu (2000). Though with some criticism, the questionnaire used in CTAMS (1983) is a valid research instrument that had been examined and modified through years specifically focusing on the Canada as a tourism destination. The other studies were reviewed because of their close association with Chinese tourists as well as similar objectives of this study. Bignon et al, (1998) and Chen & Hsu (2000) both studied examine nation A (Chinese) consumer's destination image of nation B (Canada) and the study sites were all in nation A. To analyze the product-market match among two sides, it is important to create meaning measurements catering to both sides. Thus, Hu and Ritchie's study (1993) was selected due to its focus on destination attractiveness with a strong supply influence. The result of above process was the final 32 attributes related to tourism in Canada.

The 32 attributes were selected based on travel issues in general and the explicit Canadian tourism attractions for possible future demand. Travel issues were: outstanding scenery, reliable weather, interesting and friendly local people, personal safety, environmental quality of air, water, and soil, expenses of traveling to the country and expenses traveling in the country, which are all the foremost of potential travelers; in the specific case of Chinese tourist traveling Canada, three more questions

were adopted concerning the feasibility of reaching Canada (ease of obtaining a visa), the language barrier (the availability of services in Mandarin), and the comfort degree of traveling in non-Asian environment (presence of Chinese in the country). A list of tourism attractions was generated from CTAMS (1983); additional attributes were also identified on the basis of items perceived by the researcher to be potentially important to Chinese visitors. It is suggested that attributes from both the studied organization, either a company or a destination, and attributes from the competitors should be considered (Oh, 2001). However, the objective of this study does not suggest comparisons between Canada and other outbound tourism destinations for China, because Canada is still not considered as a feasible outbound destination nor had it received ADS. In addition, the study by Pike (2003) criticized IPA's validity as a competitive position analysis tool; therefore, attributes from competitors were not considered in this study. To avoid possible objectivity of researcher being reflected in the result of the respondents, all travel issue attributes in the importance section had been carefully worded to main a neutral property, while the wording in the performance section of these travel issues had been adjusted to reflect Canada.

Different people perceive the same attribute differently because of differences in lifestyle, income, etc. The purpose of studying consumers' perceptions of attributes of a destination was to provide constructive insight to tourism practitioners for effective and efficient destination promotion to the target consumers. However, a comparatively worse perception on certain attributes may also caused by the respondents' lack of knowledge on this attribute. Thus, the result of analyzing the perception of the Canada's destination attributes by Chinese consumers reflects two levels of understanding: 1) whether the consumer think Canada is performing quite positively on certain subject; and 2) whether the consumer does obtain enough information on the subject to be evaluated. For the purpose of reflecting above two levels of understanding, one test attribute was created as "the perceptions of coral reef in Canada." Canada, as a geographically large country, features a variety of tourism

attributes; to find a tourism attribute that is commonly existed in countries other than Canada create levels of difficulty. In this study, coral reef was selected as the tester for the understanding of the knowledge depth of Canada from Chinese consumers. The degree of how Chinese have perceived Canada as a destination offering "coral reefs" partially supported the finding of "to what level Chinese tourists have the understanding of Canada" with the consideration of possible lack of knowledge on the ecology of coral reef. The level of understanding was mainly supported by the qualitative study on the comments of participants on tourism in Canada.

In order to avoid the forced answer from the participants, researcher had stated the possibility of not answer any questions they thought inappropriate; this statement was reinforced verbally to every participants before filling in the questionnaire. With the effort of avoiding possible faulty response on this question, the frequency of people responding to this question partially illustrated the extent of knowledge respondents have on tourism resources in Canada confidently.

In terms of scale and evaluation, the suggestion of Oh (2001) on the scale selection was also implemented by unitizing unidirectional scale. Future participants of this study were invited to evaluate each of these attributes in terms of their importance and performance separately on a Likert scale as frequently adopted by researchers such as Ryan and Mo (2001). The scale runs from "1" representing "Not at all important" in importance evaluation and "Not at all attractive" as performance evaluation to "5", "very important" in importance evaluation and "very attractive" in performance evaluation. The mid-point, "3" represents the neutral evaluation of the importance and performance.

The designed questionnaire was translated to Mandarin by the researcher and then back-translated by an independent translator; it was then tested among eight participants fluent in Mandarin and reviewed by UW Office of Human Research before distribution.

4.3.2 Population and sample.

The target population in this study was potential Mainland Chinese tourists for Canada; they were defined as Mainland Chinese consumers with household incomes over 3,000 RMB/month, who are aged 25 to 44, who have higher educational levels, and who hold professional and managerial positions. This definition was based on findings from several studies including the CTC (2001a; 2001b), Qu & Li (1997), Huang & Hsu (2005), Cai et al (1999), Cai et al. (2000), Ryan & Mo (2001). The sample population is the Chinese citizens who will travel internationally or who had family members traveling internationally during the survey period of time. CTC (2001a) reported an estimated 2,989,600 Chinese as potential outbound tourists for Canada; limited by the resources, a quota sampling technique was utilized with the target of 500 questionnaires.

Questionnaires were distributed in the international departure lounge in terminal two of the Beijing Capital International Airport (BCIA), Beijing, China. "BCIA.... is a large scale international airport, with most important location, biggest scale, fullest facilities and busiest transportation in China." (BCIA, 2004) During 2005, over nine million passengers had departed from BCIA to international destinations, Hong Kong, and Macao. Among the 25 international airports in China, Beijing is the main gateway for Chinese international travelers in northern China, while Shanghai Hongqiao and Guangzhou Baiyun International Airports serves as the southern main gateway (Bowden, 2006). Number two terminal in Beijing International Airport officially operated from November 1st, 1999; currently the majority of the international flight from Beijing departed from terminal two to 69 international destinations. As the last stop for any Chinese who will travel abroad to international destinations, Hong Kong, and Macao, the international airport was the obvious location for sampling.

4.3.3 Data Collection Procedures

Participant identification and selection occurred throughout the month of January 2006. Operation data from the airport showed that international departures from BCIA are more frequently during the

latter half of the year, with the peak between late August and early October (BCIA, 2004). Despite this disadvantage, limited by the research period, the four weeks in January were selected for data collection for logistical reasons – the researcher was in China at this time. January is a typical return-to-school point for Chinese students studying abroad, it was expected in the data result that younger participants (under age 25) would obtain a higher than normal percentage of the overall sample.

Permission was obtained from the airport authority to conduct this research study. The researcher had surveyed in various periods of the day during the four weeks for data collection. Passengers who were sitting in the international departure lounge and waiting for the flight were approached, screened through questioning, and finally asked to participate in this study. The screening process was based on potential participants' nationality and their trip destination. For the proper representation of the population, people at the airport who were not Chinese citizen were not invited to this study. Of the potential participates, those who did not travel to international destinations, Hong Kong, or Macao, or who did not accompany a family member with a travel plan to above destinations were not asked to complete the questionnaire. All attempts were made by the researcher to ensure a representative sample of potential Chinese tourist for Canada to complete a questionnaire.

A letter of introduction as well as a questionnaire was distributed to willingly participants. It was clearly indicated in the introduction letter that to complete a questionnaire, a participant had given his/her consent to participate in this study. Contact information was also listed in the introduction letter for any of their further concerns, questions, or comments. A thank you note was distributed to the participant upon the completion of the questionnaire.

4.3.4 Questionnaire Data Analysis

Upon completion of all questionnaires and before data entry, questionnaires were screened for errors, such as incomplete questionnaires, responses that appeared to be arbitrary choices on the

questionnaire, and multiple answers for single answer question. Questionnaires that were either incomplete or with apparently invalid responses were rejected. In those rare incidences that multiple answers were selected, the question, however not the overall questionnaire, was rejected. After all questionnaires were examined for errors, they were entered into a computer and analyzed using SPSS 14.0 software.

The data collected through questionnaires were first analyzed by their demographic and trip characteristic variables. Through the analysis of each item in terms of importance of destination attributes and performance of perceived destination attributes, an importance-performance analysis (IPA) were created to represent the performance of each attribute, and the grid in a whole represents the coherences and/or gaps on current destination image of Canada as perceived by these potential tourists.

Descriptive analysis were later taken place on the desired destination attribute (section IV of the questionnaire) to form an image of a desired trip to Canada obtained by potential Chinese tourists.

4.4 Content Data Analysis

The questionnaires featured a section of open-ended questions for participants to identify their image of tourism in Canada. The result of this section as well as the promotional materials obtained from CIC China Division was analyzed through content analysis to reflect the general image of tourism in Canada and the performance of promotional materials circulated in CTC China Division. The following section introduces content analysis of the promotional material first, and the open-ended phrases later.

4.4.1 Content analysis of promotional materials

To discover the coherences or gaps between the perceived importances of tourism attributes, to the performance of promotional materials from CIC China Division that would be distributed after ADS

is granted to Canada, content analysis is adapted in the studying of the promotional materials. Content analysis is a systematic technique for analyzing message content and message handling. It is a tool for observing and analyzing the overt communication behavior of selected communicators. (Budd, Thorp, and Donohew, 1967, p.2) Creswell (2002) pointed out the advantage of utilizing content analysis includes the potential to gain an in-depth understanding of the language and words of the document or communication piece being studied. Content analysis is deemed one of the most common approaches in geographical research on travel literature, allowing for the understanding of textual representations (Lew, 1991). Thus, content analysis technique was chosen for the study to reflect the current promoted image of Canada as a tourism destination. At the time of field research, virtually all Canadian marketing material available in Mandarin language in mainland China came through the CTC's China Division. Thus, the materials to be analyzed were acquired from that office in December, 2005 (Appendix C Promotional Material Inventory).

Both written text and graphic images of the brochures were coded under the developed list of destination attributes of Canada (Section 4.2.1); this is for the purpose of destination brand attributes. The appearance frequency in each attribute determined the attention level of each attributes obtained from CTC and tour operators, which represents the performance of each attributes in promotion. To compare the importance of destination attributes ranked by potential tourists and performance of promotional materials, important and performance analysis was carried out; the result from the above match represented the coherences and or gaps between the perceived destination images of Canada by potential Mainland Chinese tourists to the proposed destination image of Canada.

Three assistants with strong Mandarin and English abilities assisted the researcher in the coding process. These assistants were selected because of their multi-cultural background. Same as the primary researcher, assistant A came from northeast of China; assistant B came from Beijing, China; assistant C came from Southern China. Both the primary researcher and the assistants have years of

living experience in Canada, all above factors contributed to the result of a proper understanding of the promotional material which in turn leaded to a more cohesive image of Canada. Assistants had introduction on the purpose of the study, materials for this study, and coding standard. Later, assistants, as well as the primary researcher, had coded qualified promotional materials independently. Assistants were asked not to discuss any of the comments on coding, unless any questions occurred, until the completion of the process.

Contents, including images, maps, descriptive sentences, and informative sentences, was coded according to the attributes; the attributes employed in the content analysis came from the list of 31 tourism attributes employed in the previous section, excluding the tester attribute of "coral reef."

In the determination of manifest versus latent content utilized in the coding process, it is recommended that manifest content reflect the surface of the comments with more subjectivity, while latent comment reflects beneath messages delivered through the content affected by researchers objectively, and need evidence support from other sources (Berg, 2004). In this study, the manifest content showed the frequency of each attribute appeared which represented the promotional image, without differentiation on the attractiveness or unattractiveness of such attributes from interpretation.

However, the attractiveness or unattractiveness of an attribute interpreted by consumers, identified as latent content, plays critical roles in the management decision of improving or decreasing promotions. Therefore, for the better understanding of each attributes performance, latent content on attractiveness or unattractiveness was counted as the bases. Attributes were interpreted on the level of attractiveness on the individual bases incorporation with evidence from content analysis result from research question four "the image of Canada as a tourism destination described by respondents". Total frequency of each attribute (counts of attractiveness plus counts of unattractiveness) were utilized to represent the performance of the attributes being promoted for the purpose of comparison

with objectivity between importance ranked by Chinese respondents and the performances of the attributes promoted by CTC,

Each piece of content, such as "weather" was coded "1" as attractive, "0" as ambiguous, and "-1" for unattractive. One piece of content could be coded toward as many as applicable attributes as possible. Even though the piece of content would be clearly identified as one of the attractions, for example whale watching; it can also represent the beautiful Canadian scenery and "quality air, water, and soil". Thus, researchers followed the rule of counting as many applicable attributes as possible in this study.   The process resulted in a list of 31 attributes with cumulative frequency on each attributes identified. Upon the completion of the process, the complete coding result was entered into SPSS 14.0 for further analysis.

4.4.2 Content analysis of open-ended question

The content analysis on the open-ended question result, compared to the previous section, was much simpler because of the nature of the data. Phrases were coded into themes; frequency of each theme were counted and categorized into larger groups of related subjects.   The result of this content analysis reflected the general image of tourism in Canada, which complimented the quantitative evaluation of the image illustrated in section 4.2.

Results from both questionnaires and content analysis of promotional materials complement each other to fulfill the research purpose of detecting coherences and/or gaps between the perceived image of Canada as a tourism destination held by potential Chinese tourists and proposed image of Canada presented by CTC through promotional materials.

Chapter 5 Results

Chapter five reports the findings of this study. This research was designed as a product and market match of the perceived image of Canada and the marketing position of Canada by answering eight research questions. Therefore this chapter reflects the research design by answering each of the research questions. The findings of each research question is compared with the previous studies on Chinese consumers to Canada (CTCa, 2001; CTC, 2006), as well as close competitors including United States (Cai et al. 2000; Jang et al. 2003) and Australia and New Zealand (Ryan & Mo, 2001). Data were analyzed with 95% confidence level; therefore, α refers to either 0.050 for one tailed test or 0.025 for two tailed test through this chapter.

5.1 Research Question One

The level of interest and reasons of Chinese consumers in visiting Canada for vacation

The participants of this study were questioned about their interest to visit Canada in the future. In addition, participants who favored Canada were encouraged to identify tourism destinations, attractions, and tourism sights that they would visit in their trips to Canada; participants who did not favor Canada were encouraged to identify the reasons of not coming. Among the qualified 433 respondents, 55.4% (n=240) said they were interested in Canada whereas 43.2% (n=187) indicated that they had no interest in Canada. There were six missing answers (1.4%) for this question. For the sake of conciseness in writing, participants who are interested in visiting Canada are labeled as PIVC; those participants who are not interested visiting Canada is labeled as PNIVC.

5.1.1 Reference of Participates Interested in Visiting Canada

Frequency tests showed that among the 240 PIVC, 67.1% of the respondents (n=161) indicated one or more possible destinations while 32.9% of the respondents (n=79) did not provide any answer.

Through the content analysis of the answers generated from those 161 respondents, 53 phrases were mentioned in a total of 238 times. As one of the world seven wonders, Niagara Falls clearly represents Canada (n=29). Other leading locations are Vancouver (n=21), Natural Scenery (n=18), City Scenery (n=14), Great Lakes (n=13), Toronto, (n=13), Culture (n=12), Visiting Friends and Relatives (n=10), Ottawa (n=9), and Rockies (n=7).

Along the primary researcher, three assistants with strong Mandarin and English abilities and considerable amount of knowledge of Canada first categorized the 53 phrases (originals in Mandarin) into groups and translated phrases into English individually. The result from all assistants was discussed in group later; a unified five categories were formed as the solution of above process, as:

- Sights—individual Canadian tourism sights that were identified

- Tourism Destinations—tourism regions or cities identified

- Attractions—the general aspects of Canada which attracts Chinese tourists; no specific sights or regions were identified

- Activities—the activities PIVC were willing to do in Canada

- Others—other comments beside the above four

The weight of each phrase is calculated as the number of times a specific phrase is mentioned divided by the total number of times all phrases had been mentioned (n=238). The weight of each category is therefore calculated as the total of weight on all phrases in each category. To compare the weight of each category: attractions (n=69, 29%) were most commonly mentioned followed by tourism sights (n=66, 27.7%), tourism destinations (n=54, 22.7%), activities (n=40, 16.8%), and others (n=9, 3.8%). (Detailed in Table 5.1 PIVC Interest) The data suggest that close to 30% of the comments from respondents who expressed interest in visiting Canada are related to general attractions of Canada. This suggests these respondents have limited tourism knowledge of Canada; rather they have a perspective of Canada that features fairly attractive aspects such as natural scenery

(n=18, 7.6%), city scenery (n=14, 5.9%), and culture (n=12, 5.0%).

However, there are still 66 comments (27.7%) related to specific tourism sights; among those sights, nearly half of the comments mentioned Niagara Falls (n=29, 12.2%) while 13 comments (5.5%) mentioned Great Lakes, and seven comments (2.9%) on Rockies. It is clear that Niagara Falls is a part of the Great Lakes; Niagara Falls and Great Lakes generated a total frequency of 17.8%, which illustrated the attractiveness of this tourism area.

Fifty four comments (22.7%) are preferred tourism destinations or cities, among those, Vancouver is by far the most popular (n=21, 8.8%), follow by Toronto (n=13, 5.5%), Ottawa (n=9, 3.8%), and Montreal (n=4, 1.7%). In terms of the city or regions, this finding is similar to the findings from CTC (2006); however, CTC's finding has shown the greatest interest in Toronto (71%) among the four key markets of Beijing, Shanghai, Guangzhou, and Shenzhen. Other places such as Victoria Island, Quebec, Calgary, Winnipeg, Kingston, and Banff were all mentioned once or twice. Popular cities, for example Vancouver, Toronto, Ottawa, and Montreal together had been mentioned 47 times compared to the total of 54 times mentioned on tourism destinations, which shows that these prospects have limited knowledge on tourism development on other cities or regions.

In terms of activities, detailed in Table 1. PIVC Interest, respondents would like to visit friend and relatives the most (n=10, 4.2%), followed by going on a maple leaf (leaf color) tour (n=6, 2.5%), studying in Canada (n=6, 2.5%), go shopping (n=5, 2.1%), and go skiing (n=5, 2.1). Other activities, entertainment, dining, whale watching, golf, gambling, and taking a winery tour were all mentioned once or twice.

There were also nine comments (3.8%) on the general description of Canada in terms of country development, economy, social and political environment. These comments rather describe the image of Canada instead of answering the question that where to visit or what they would do in Canada. Therefore, these comments were analyzed later to answer research question four, along other phrases

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generated for that question specifically.

Table 5.1 PIVC Interest

Categories	Phrases	N	Weight	Categories	Phrases	N	Weight
Attractions				Tourism Sights			
	Natural Scenery	18	7.6%		Niagara Falls	29	12.2%
	City Scenery	14	5.9%		Great Lakes	13	5.5%
	Culture	12	5.0%		Rockies	7	2.9%
	Historical Sights	7	2.9%		Bethune memorial	3	1.3%
	Arts	5	2.1%		northern lights	3	1.3%
	Museum	3	1.3%		Parliament hill	3	1.3%
	Canadian Lifestyle	3	1.3%		NBA Toronto's Raptors	3	1.3%
	Forest	2	0.8%		CN tower	2	0.8%
	Small-Town	2	0.8%		Stanley park	1	0.4%
	Beach	1	0.4%		Victoria park	1	0.4%
	Seacoast	1	0.4%		1000 island	1	0.4%
	Wildlife	1	0.4%				
Subtotal		69	29.0%	*Subtotal*		66	27.7%
Tourism Destinations				Activities			
	Vancouver	21	8.8%		VFR	10	4.2%
	Toronto	13	5.5%		Maple Leaf Tours	6	2.5%
	Ottawa	9	3.8%		Education	6	2.5%
	Montréal	4	1.7%		Shopping	5	2.1%
	Victoria island	2	0.8%		Ski	5	2.1%
	Quebec	1	0.4%		Entertainment	2	0.8%
	Calgary	1	0.4%		Dining	2	0.8%
	Winnipeg	1	0.4%		Whale Watching	1	0.4%
	Kingston	1	0.4%		Golf	1	0.4%
	Banff	1	0.4%		Gambling	1	0.4%
					Winery Tour	1	0.4%
Subtotal		54	22.7%	*Subtotal*		40	16.8%
Others							
	Economy	1	0.4%				
	Many Chinese Employment	1	0.4%				
	Environment	1	0.4%				
	Immigration	1	0.4%				
	Take A Group Tour	1	0.4%				
	Free	1	0.4%				
	Clean	1	0.4%				
	Advanced	1	0.4%				
	Multidimensional	1	0.4%				
	Subtotal	9	3.8%				

Table 5.1 shows:

1. Amongst people interested in visiting Canada, Niagara Falls and Ottawa are the most recognized national symbols of Canada, followed by the maple leaf and northern lights. It is noticed that tours in Canada designed to cater tourists with Chinese background, either from permanent residence from China or inbound Chinese tourists, had promoted their fall color tours as "maple leaf tours" (in translation from Mandarin) (CPAC, 2007). This study adopted the English translation of "maple leaf tours" instead of the popular Canadian terminology of fall color tours.

2. Canadian natural scenery and city scenery are all fairly attractive; respondents are interested in Canadian culture and lifestyle as well. Visiting friends and relatives is identified as the number one purpose for future visit to Canada.

3. Ontario has by far the most tourism attributes (n=64) recognized by Chinese consumers who favored Canada followed by British Columbia (n=25), Quebec (n=5), Alberta (n=2), and Manitoba (n=1). Two territories also share Northern Light which was mentioned three times. However, there has been no indication of interest in the Atlantic Canada provinces or in Saskatchewan.

4. Many Chinese consumers have no tourism knowledge specifically on tourism sights, products, or tourism activities in Canada, even though they are willing to travel to Canada in the future. However, these people have a positive image of Canada as a country and a tourism destination.

5.1.2 Reasons of Respondents Not Interested in Visiting Canada

Of all the 187 participants who indicated no interest in visiting Canada, 144 (74.6%) provided their reasons. Each participant were encouraged to indicate all their reasons of not interested in Canada, thus 166 phrases were generated and furthered categorized into 18 reasons following the same

procedure as mentioned in above section. Among the 18 reasons mentioned (Table 5.2 Reasons Not to Visit Canada), over one-third of the reasons concerned expense (n=55), followed by lack of free time (n=33), unawareness of Canada (n=21), distance (n=13), cold weather (n=11), and the lack of attractiveness (n=10). Three PNIVC had also identified the reason for not traveling to Canada as "never seen tourism product promotions." Two respondents expressed their concerns on the language barrier and difficulty in obtaining Canadian Visitor Visa.

Table 5.2 Reasons Not to Visit Canada

Reasons	N	Weight
not enough economic power	58	34.9%
too busy no time	33	19.9%
don't know the country	21	12.7%
too far	13	7.8%
too cold too much snow	11	6.6%
nothing too attractive	10	6.0%
no differences from USA	3	1.8%
not as attractive	3	1.8%
don't want to travel abroad	2	1.2%
never seen promotions	2	1.2%
no friends or relatives	2	1.2%
age (too young, too old)	2	1.2%
too many Chinese	1	0.6%
no historical sights	1	0.6%
visa is too difficult to obtain	1	0.6%
language barrier	1	0.6%
don't like big cities	1	0.6%
no opportunity	1	0.6%
Total	166	100.0%

The result shows that Canada is not attractive because of several factors generally beyond the scope of government to address easily:

1. The low exchange rage between RMB and the Canadian Dollar (1: 0.13) results in a high cost for traveling to Canada. Generally, a round-trip airline ticket from Beijing to Vancouver or Toronto starts at 12,000 RMB. The average annual expenditure of a household in China was

7,182 RMB; and even among the highest income household (tenth deciles), the average annual expenditure was 16,842 RMB (NBS, 2007). Comparatively, it is understandable that the traveling expense to Canada is a barrier for Chinese consumers.

2. The large physical distance between Canada and China caused the concern of "lack of free time". The distance required a Chinese consumer to spend 13 to 24 hours in flight to reach Canada, across 12 time zones. A study done by Edwards et al. (2000) showed that travelers across 10 times zones need at least six days to adjust to the new schedule in arrival destination, especially to elders. Through the survey process, a number of elders expressed verbally about their health concerns for long distance traveling. Physical distance definitely placed Canada in disadvantage in the Chinese tourism market.

Beside the obvious reasons, such as consumers' lack of free time, 35 entries are knowledge based concerns including "unawareness of Canada" (n=21), "lack of attractiveness from Canada" (n=10), "lack of differences from U.S.A" (n=3), and "lack of historical sights" (n=1). The fact that there are 21.1% of the entries based on lack of knowledge show that there is need for promotion of Canada and Canadian attractions, especially promotions that differentiate Canada from European countries and U.S.A.

5.2 Research Question Two

What are the demographics of PIVC? Is it difference from PNIVC?

The following section reports the demographics of PIVC and its differences from PNIVC in terms of five variables: gender, marital status, age group, education, and household monthly income. Chi-square test method is utilized in comparison of PIVC and PNIVC demographics because scores of the variables tested in this section are at either the nominal (Pearson Chi-square method) or ordinal (Kendall's Tau-c) level of measurement. Table 5.3 Demographic Comparison between PIVC and

PNIVC summarizes the results.

5.2.1 Gender and Marital Status of PIVC and PNIVC

Among the 240 PIVC, there were 105 male respondents (43.8%) and 127 female respondents (52.9%) with 8 missing responses (3.3%). This result shows a male to female ratio of PIVC of 1.0:1.2. PNIVC participants feature the male to female ratio at 1.0:1.8 (63: 114). In terms of gender variable, Person Chi-square test shows marginal significant differences (p=.049) between PIVC and PNIVC. The result shows that female Chinese citizens are significantly less interested in visiting Canada than male Chinese citizens, which agrees with the result from previous studies (Cai et al. 2000; Ryan & Mo, 2001). Compared with the marital status of all respondents, PIVC had a higher percentage of married participants. Of the total 240 respondents, 126 are married which represents 52.5% of the sample; 114 (47.5%) are single. Of the 197 PNIVC, 82 are married (43.9%) and 95 are single (50.8%). There is no significant difference between on the basis of marital status for either PIVC or PNIVC.

5.2.2 Age and Education of PIVC versus PNIVC

The most frequent age group among PIVC was 25 to 29 years old (n=61, 25.4%), followed by the 19 to 24 years old (n=54, 22.5%) and the 30 to 34 years old (n=39, 16.3%) as in Table 5.3 Demographic Comparison between PIVC and PNIVC. The majority of participants who are not interested in visiting Canada are located in the younger age groups. The 25-29 group holds the highest percentage at 34.2% (n=64) followed by 19-24 (n=49) and 30-34 (16%). In terms of age, there are significant differences between PIVC and PNIVC. The PIVC are more likely to be age 35 and older, especially frequent among 35 to 39 years old group. On the other hand, PNIVC are more likely to be in the 19 to 25 years old cohort. The findings from CTC (2001a) showed similar age report of visitors who would be interested in Canada with a less population on the 19 to 24 years category. On the other

hand, the result from Jang et al (2003) on the visitors to the United States that showed older respondents than this study.

Participants with higher education (obtaining bachelor, masters or higher degrees) dominate the sample of PIVC (85.2%). Among those, participants with undergraduate education (n=155) is the majority, at 64.6%, followed by graduate education (n=47) at 19.6% and high school education (n=31) at 12.9%. Meanwhile, the PNIVC groups shows similar pattern: undergraduate education (n=119, 63.6%) followed by graduate education (n=39, 20.9%) and high school education (n=24, 12.8%). A Chi-square test shows no difference between PIVC and PNIVC in terms of education variable (tau=0.007, p=0.886). Compared to the CTC's projection of 61% with higher education (2001a), the respondents who are interested in Canada in this study are much higher educated (85%).

5.2.3 Household Monthly Income among PIVC and PNIVC

The household monthly income scores of both PIVC and PNIVC were fairly evenly distributed among nine ranges starting from less than 1,500 RMB to 12,000RMB or above. In the PIVC, 3000-4499 RMB category is in lead (n=45, 18.8%) followed by 4500-5999 RMB category (n=41, 17.1%) and 1500-2999 RMB category (n=32, 13.3%). In PNIVC, 3000-4499 RMB category is in lead (n=34, 18.2%), followed by 1500-2999 RMB category (n=30, 16.0%) and 12000 RMB or above category (n=24, 12.8%). The Pearson Chi-square test shows no significant differences between two groups in terms of household monthly income variable (tau=0.065, p=0.242).

To summarize the demographic differences between participants who are interested in visiting Canada and those who are not interested, the above results suggest: 1) Respondents aged 35 or over, especially 35 to 39, are more interested in Canada than the respondents from younger cohorts; and, 2) Females are less interested in Canada than their male counterparts

These results are consistent with the findings of other studies of Mainland Chinese tourists (Cai et

al. 2000; CTC 2001a; Jang et al, 2003; Ryan & Mo, 2001) that found that more affluent Chinese consumers (household incomes over 3,000 RMB/month), aged 25 to 44 with higher education, are the target market for travel to Canada. Further, this study finds that males are significantly more likely to be interested in travel to Canada than are females.

Table 5.3 Demographic Comparison between PIVC and PNIVC

	PIVC		PNIVC		Comparison	
	Freq (n=240)	%	Freq (n=187)	%	Test	P
Gender					Pearson X²	
Male	105	43.8%	63	33.7%	3.875	0.049
Female	127	52.9%	114	61.0%		
Missing	8	3.3%	10	5.3%		
Marital Status					Pearson X²	
Married	126	52.5%	82	43.9%	3.355	0.067
Single	101	42.1%	95	50.8%		
Missing	13	5.4%	10	5.3%		
Age Group					Kendall's Tau-c	
less than 18	3	1.3%	1	0.127	0.017	0.171
19-24	54	22.5%	49	26.2%		
25-29	61	25.4%	64	34.2%		
30-34	39	16.3%	30	16.0%		
35-39	26	10.8%	9	4.8%		
40-44	24	10.0%	13	7.0%		
45-49	7	2.9%	6	3.2%		
50-54	14	5.8%	8	4.3%		
55-59	4	1.7%	2	1.1%		
over 60	8	3.3%	2	1.1%		
Missing	0		3	1.6%		
Education					Kendall's Tau-c	
9 Yrs or less	0		2	1.1%	0.007	0.886
Middle school	2	0.8%	3	1.6%		
High school	31	12.9%	24	12.8%	Tau-c	Sig.
University	155	64.6%	119	63.6%	0.007	0.886
Masters or above	47	19.6%	39	20.9%		
Missing	5	2.1%	0			
Household Monthly Income					Kendall's Tau-c	
less than 1500	19	7.9%	23	12.3%	0.065	0.242
1500-2999	32	13.3%	30	16.0%		
3000-4499	45	18.8%	34	18.2%		
4500-5999	41	17.1%	21	11.2%		
6000-7499	27	11.3%	22	11.8%		
7500-8999	13	5.4%	9	4.8%		
9000-10499	20	8.3%	10	5.3%		
10500-11999	9	3.8%	9	4.8%		
12000 or above	30	12.5%	24	12.8%		
Missing	4	1.7%	5	2.7%		

5.3 Research Question Three

What are the trip characteristics of the PIVC? Are there any differences from the PNIVC?

The following section reports the trip characteristics of PIVC and their differences from PNIVC. Trip characteristics variables include previous travel experience, future travel plan, arrival destination, and trip purposes. Again the Chi-square test method is utilized in the comparison between PIVC and PNIVC since all variables are at nominal level of measurement.

5.3.1 Previous Outbound Travel Experience

Among 240 of the PIVC, respondents with and without previous international travel experience almost equally split the sample; there are 116 respondents with experiences (48.3%) versus 121 respondents without experiences (50.4%). However, in PNIVC, over 60% of the respondents (n=113) had never traveled outside of Mainland China (n=113). Table 5.4—Previous Travel Experience and Future Travel Plan—illustrates the Chi-square test result between PIVC and PNIVC in terms of previous international travel experience and future travel plans. The Chi-square test shows that there are significant differences between respondents with and without previous outbound travel experiences in their interest in Canada (x^2=4.502, p=0.034). Respondents who had traveled internationally were more likely to be interested in visiting Canada (n=116). Respondents without international travel experiences (n=121) were less likely interested in Canada. The finding is consistent with previous studies (Cai et al. 2000; CTC 2001a, 2001b; Ryan & Mo, 2001) that found participates with previous outbound travel experience are more likely to travel internationally for vacation purposes.

Table 5.4 Previous Travel Experience and Future Travel Plan

	PIVC		PNIVC		Comparison	
	N=240	f	N=187	f	X^2	P
Previous Experience						
Yes	116	48.3%	71	38.0%	4.502	0.035
No	121	50.4%	113	60.4%		
Missing	3	1.3%	3	1.6%		
Future Travel Plans						
Yes	123	51.3%	65	35.1%	11.267	0.001
No	116	48.3%	120	64.2%		
Missing	1	0.4%	2	0.7%		

5.3.2 Future Travel Plans

There were 123 respondents (51.3%) in PIVC that were traveling internationally on the survey date; a hundred sixty six respondents had no plan of traveling, they were at the airport to say "good-bye" to family members who were traveling internationally. Among 187 of PNIVC, only 65 (35.1%) of them were traveling internationally, while over 60% of the PNIVC (64.2%) were not traveling. Chi-square test shows that over 50% of the respondents who were traveling had interest in Canada (n=123, 51.3%), while 64.2% of the respondents who were not traveling had no interest in Canada (n=120). The test shows that there is a significant difference (p=0.001) between people who have and who do not have outbound travel plans in terms of their interest in Canada. Consistent with the results from last section, respondents who had never traveled internationally or had no intention of traveling internationally are less likely to visit Canada.

5.3.3 Arrival Destination

The 192 respondents who were traveling internationally were asked about their arrival destination.

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186 respondents reported 209 entries, which were further divided into 38 areas, countries, or continents (detailed in from Appendix D Arrival Destination). As an open-ended question, respondents were invited to indicate all their arrival destinations if they were traveling to more than one destination.

The top ten arrival countries are Australia (n=18, 8.6%), USA (n=17, 8.1%), Japan (n=17, 8.1%), Singapore (n=13, 6.2%), Canada (n=12, 5.7%), England (n=12, 5.7%), Thailand (n=11, 5.3%), Hong Kong (n=9, 4.3%), and New Zealand (n=8, 3.8%). The entry percentage indicated above is calculated as (number of an entry)/ (total entry number n=209). Despite the fact that "country" as arrival destination was clearly indicated in the questionnaire, 29 respondents reported either continent or a region as arrival destination with the entry percentage of 13.9%. Among these 29 respondents, 22 reported "Europe" (0.5%) as the destination, one reported "Africa" (0.5%), two reported Western Europe" (1.0%), two reported "Southeast Asia" (1.0%), one reported "Middle East" (0.5%) and one reported "USA Hawaii" (0.5%) as the arrival destination. Over one third of the arrival destination is located in Europe (n=75, 35.9%), followed by Asia (n=68, 32.5%), North America (n=38, 18.2%), Oceana (n=22, 10.5%), and Africa (n=6, 2.9%). No entries had reported South America or Antarctica as their destination.

Close to 70% (69.3%) of the above indicated destinations are with approved destination status approved by the Chinese government. The countries of U.S.A and Canada are the only two not approved countries among the top ten arrival destinations.

5.3.4 Travel purpose

Purpose of travel was asked of those respondents who indicated that they were traveling on the survey date. Eighty eight percent of these traveling respondents (n=169) had provided their travel purposes which were later summarized into six categories as business, education, visiting friends and relatives

(VFR), leisure, immigration, and miscellaneous purposes such as travel for religious activities. Close to one-third of the responses are leisure (n=62, 32.3%), as the leading category followed by business (n=46, 24.0%), education (n=31, 16.1%), VFR (n=22, 11.5%), immigration (n=6, 3.1%), and miscellaneous purpose (n=2, 1.0%). As the research period (January 3rd to January 31st, 2006) overlapped with the holiday season (2006 New Year holiday and the Chinese New Year on January 29th 2006); it is understandable that leisure represents the highest reported travel purpose. Furthermore, given that many students were returning to school in January, 2006, it is understandable that education is the third leading purpose. A chi-squared test was run on differences on the travel purposes between PIVC and PNIVC. The result shows no significant between two groups (x^2=1.443, p=0.920)

5.3.5 Arrival destination versus Travel purpose

In the relationship between destination and travel purpose, a cross-tabulation between five continents and six travel purpose categories was first carried out. Though the result shows a significant difference (x^2=34.566, p=0.023). There were 17 cells features counts less than five, which limits the statistical validity of this test. Therefore, to satisfy the statistical requirement, travel purpose variable is regrouped into four categories: Business (previously business), Leisure (previously leisure), Education (previously education), Misc. (previously visiting friends and relatives, miscellaneous, and immigration). In addition, continent variable is regrouped into four categories: Asia (previously Asia), Europe (previously Europe), North America (previously North America), and The Rest (previously Oceania and Africa), detailed in Table 5.5 Arrival Continents versus Travel Purpose.

Table 5.5 Arrival Continents versus Travel Purpose

Continent	Purpose			
	Business	Leisure	Education	Misc.
Asia	15	24	5	7
Europe	22	20	8	9
North America	6	9	11	10
The Rest	3	9	7	3
x^2	19.068			
Prob.	0.025			

The cross-tabulation between regrouped arrival destination variable and travel purpose variable shows Chi-square value at 19.068 (p=0.025), which represents a significant differences between various continents visiting and various travel purposes. The data show that people travel for business are more likely to travel to Asian and European countries; people travel for leisure purposes are more likely to travel to Asia and the rest of the world; people travel for educational purposes are more likely to travel to North America and the rest of the world; and people travel for other purposes are more likely to travel to North America. Even though there are still two cells with counts fewer five, the author decided to retain these subgroups of the two variables. This result shows that North America is still not a popular continent for leisure among Chinese tourists, but more for education and other purposes such as immigration, and visiting friends and relatives.

To summarize, people who had previous outbound travel experience or who was traveling internationally are more likely to travel to Canada; however, participants who were traveling to North America at the survey time were more likely to travel for education and other purposes such as immigration, and visiting friends and relatives. On the other hand, respondents who were traveling to Asia are more likely traveling for leisure purposes.

5.4 Research Question Four

What is the image of Canada as a long-haul international tourism destination described by potential Chinese tourists?

To understand the image of Canada as a long-haul tourism destination, participants were asked to provide three adjectives or phases to describe Canada; as the result, two hundred and forty respondents who favoured Canada had indicated 609 entries.

It is noticed that a great number of "Cheng Yu" appeared among entries. Cheng Yu, according to the Chengyu dictionary (2007), is defined as Chinese idiomatic phrases and proverbial expressions usually consisting of four characters. It is established through usage and is accepted through practice; the meaning of a Cheng Yu is often much more difficult to derive from its constituents than an average English idiom (Wong, 2001). English idiom "in somebody's shoe's" means "in somebody's situation"; Cheng Yu performs in similar ways in Chinese however with more meanings compressed into the typical four-characters phrases, for example "Di Guang Ren Xi" (Cheng Yu in pronunciation) means geographically large and sparsely populated. Further analysis by both the primary and assistant researches showed that most of appeared Cheng Yu entries contain multiple meanings, thus they were translated into multiple phrases in English accordingly. Along the nine forwarded comments from research question 1 (section 5.1), the final count of English entries showed a total of 634 entries including 247 adjectives (39.0%), 66 nouns (10.4%), and 321 phrases (50.6%).

Frequency analysis was first performed among each of the above groups; later, content analysis was performed among all groups in search for related themes; finally, among each theme, entries were further discussed to answer the question of "whether the image of Canada in certain aspect is in favor of Canadian tourism?" For the most accurate interpretation, the judgement of whether the image is in favour is subjectively determined by the researcher and assistants according to the most original entry which is in Mandarin.

The analysis of the respondents' comments came back with four broader themes and 17 subgroups. The four broader themes are: symbols of Canada; geography; natural, social, political and economic environment; and tourism in Canada.

Canada was generally described as the most suitable country to live for human beings (n=13), far (n=6), mysterious (n=4), and elegant (n=2). Respondents associates Canada with adjectives such as interesting, romantic, and different country. They had knowledge on the fact that Canada is an immigration country, the second home to many Chinese immigrants (n=11), and the society exerts less discrimination toward Chinese compared to other countries with large number of Chinese immigrants. This may contribute to the fact that respondents had reported positive image of Canada on all most every aspects mentioned.

5.4.1 Symbols of Canada

The Maple Leaf is by far the most recognized symbol of Canada (n=23). Respondents also mentioned Niagara Falls (n=4), Great Lakes (n=3), Toronto (n=3), Ottawa (n=2), northern lights (n=1) and Vancouver (n=1). It is noticed that even though respondents could not name the famous waterfall in Canada as "Niagara", they could describe it as one of the seven wonders, thus illustrate their knowledge of the site. Suggested by CTC (2001a), Bethune's memorial site should appeal especially attractive to Chinese tourists because of the great appreciation from Chinese to Dr. Bethune for his great work in helping Chinese patients during the Chinese war. This study generated only one comment on the fact that Canada is Dr. Bethune's homeland, which illustrates the familiarity of Dr. Bethune in China.

5.4.2 Geography of Canada

Respondents reported a high concentration of comments (n=122) on the general geography of Canada; most described Canada as geographically large (n=65), sparsely populated (n=33), rich in

resources (n=10), and with clear four seasons (n=3). Other respondents reported that Canada is rather a spacious but far away country with large area of forest and many mountains. All the comments in this section reflects the fact of Canada, which provided little prove on the determination of whether the image is in favour of tourism in Canada or not.

5.4.3 Natural, social, political, and economic environment of Canada

Respondents illustrated great knowledge on the natural environment of Canada, including both rural and city environments. All 75 comments related to the natural environment of Canada expressed positively on the fact that Chinese consumers believe Canada's features are "good "(n=18), "clean" (n=28), "natural" (n=7), and "green" (n=4) environment with "quality air and water" (n=11) and "massive forest resource" (n=3). Respondents associated words such as "fresh" and "healthy", and "blue sky" with the country of Canada. It is a unified solution that Chinese consumers have great confidence on the natural environment of Canada, which is in favour of tourism in Canada.

Chinese consumer's comments on the social environment of Canada (n=118) were concentrated on two aspects: the society (n=67) and living conditions (n=51). Respondents described Canadian society as "tranquil" (n=25), peaceful (n=21), and a safe and secure environment (n=4). It is also recognized as a "multicultural" (n=6), and "harmonized" (n=5) society. The fact that there are no negative comments in this section reflected a positive image of Canadian society in the Chinese consumer's mind.

To consider the living conditions in Canada, respondents had illustrated a frequent comment on the "high" (n=7) and "comfortable" (n=14) living standard in Canada with "good education system" (n=5) and "good welfare" (n=6). Respondents considered the life in Canada to be "relaxed", "slow", and "simple". However, one respondent also indicated that life in Canada is boring. The majority of the comments on this theme are positive which pictured a peaceful slow-paced life style in Canada; a

few comments are ambiguous as slow and simple. Compared to the typical high competitive lifestyle in densely populated country of China, life in Canada is perceived as different due to the significant contrast of the living pace; whether this is attractive to the potential consumer relied on the consumer's preference.

The majority of the comments on the political environment of Canada (n=17) is "free" (n=11). Canada is considered to be a civilized, unrestrained, democratic country with good relationship with China, which formed a positive image of Canada in terms of political environment.

The economic environment of Canada retains a positive image among Chinese consumers according to comments on "advanced economy" (n=8), "advanced culture" (n=2), "rich" (n=1), and with good employment condition (n=1).

Forty-four comments were provided on the people of Canada. Close to half of the comments had indicated that Canadians are friendly (n=11); they are also warm-hearted (n=4), well-educated (n=2) with environmentally conscious (n=3). As well, Canadians are forgiving, open minded, passionate, polite and respectful. Comments in this section constructed a friendly positive image of Canadians, which are in favour of Canada's tourism.

5.4.4 Tourism in Canada

The researcher gathered 142 comments in the subject of tourism. A variety of comments on scenery, weather, tourism activities, and other issues related to tourism is illustrated in this section.

Over 80 respondents had described Canadian scenery as "beautiful", which provides the majority of prove to construct the scenery image of Canada. In addition, they described Canadian scenery as "nice", "colourful" and "pretty" with a notion on the fact that Canada is still closely associated with snow and ice. A number of general scenery, instead of specific sites, were mentioned including forest (n=9), famous lake and oceans (n=2), mountains with ice and snow caps (n=2), beautiful modern

cities (n=2), Chinatown (n=1), and country scenery (n=1). Respondents clearly have a positive image of the Canadian scenery.

Comments on the weather of Canada delivered a diverse message. The majority considered weather to be cold in the country (n=27) and Canada is an ice and snow world (n=9); even though, seven respondents had also described Canadian weather as "comfortable".

Tourism activities wise, eleven comments were generated, including skiing (n=3), arts exchange (n=2), festivals and events (n=1), going back to nature (n=1), and visitor friends and relatives (n=1). One respondent reported the willingness to join a tour group traveling in Canada and indicated verbally that lack of English was his main concerns along the fact it is usually much more economical to travel in groups.

Several comments were made specifically to tourism in Canada. One respondent, who clearly had previous travel experience, indicated that "Vancouver is not very clean" and "the city of Victoria is very beautiful." According to one respondent, there are too many Chinese living in the country, thus decreases the attractiveness of Canada. In terms of competitiveness in the international tourism market, one respondent commented that "Canada is not as attractive as Europe"; another commented that "I would go to United States instead of Canada if I visit North America", though a Canadian tourism visa is easier to obtain than one from U.S.A. It is noticed that Canada is closely associated with U.S.A. than other countries, reported by six respondents. No comments related to other tourism destinations were mentioned.

To summarize, Canada, according to respondents, is a geographically large and sparsely populated country with good natural environment. Respondents reported Canada as beautiful, clean, tranquil, peaceful, and secure. Even though there are mixed comments on the weather of Canada and the competitiveness of tourism in the international market, the general image of Canada among

participants is quite positive, which is a great asset to the Canadian tourism industry. However, there is still a percentage of Chinese who do not have a clear image of Canada because of the lack of knowledge. The existence of this group is supported by the fact that there are eight respondents commented "vague or no image of Canada". CTC (2006) found that the perceptions of Canada among Chinese are, safe, clean, and welcoming, closely associated to U.S.A, rich and developed nation which all agrees with the finding from this study. In addition, it is noticed that respondents have fair amount of knowledge on Canadian social and political environment; these comments illustrate a well perceived image of an immigration country. This finding is beyond the scope of the CTC's study (2001a; 2006).

Most of these comments were made in the form of adjectives, nouns, or phrases delivers messages on single theme. A number of Cheng Yu appeared in the phrases comments. Cheng Yu usually delivered messages related to multiple themes; the majority of the Cheng Yu appeared to describe the geography, scenery, and weather of Canada. These descriptions are vague and general which commonly appeared in the school's textbooks on the subject of international geography. This fact may reflect that the general knowledge of Canada was obtained mainly from textbooks from previous education. In addition, these descriptions correspond to a number of countries including Canada. Considering the fact Canada features the best national image among the 12 major nations (The Canadian Press, 2007), it is questionable that respondents' knowledge is correctly associated Canada with the compliments or simply indicated generalized description from memory.

5.5 Research Question Five

How potential Chinese tourists evaluate Canada's image as a tourism destination in terms of image attributes?

To assess how potential Chinese tourists evaluate Canada's image as a tourism destination quantitatively, respondents who were interested in visiting Canada were asked to evaluate the

importance of image attributes, and their perceptions of these image attributes in Canada. Two importance and performance analyses (IPA) were performed, including analysis on travel issues and on tourism attractions. The cross-hair placement of four IPA studies had adopted the two stepped method (scale mean, then actual mean) by Oh (2000). Scale means cross-hair is represented by dotted lines while actual mean cross-hair is represented by regular lines in the IPA grids in this study. The following section reports the finding of IPA studies respectfully.

The total number of attributes presented to the participants was 32, including a test attribute of "coral reef in Canada". As mentioned in Section 4.3.1 and 4.3.3, participates were invited to evaluate this test attribute of "coral reef in Canada" on the scale of one to five (one as not at all attractive; five as very attractive). The data was later recoded into "-2" to "2" ("-2" as not at all attractive; "2" as very attractive). The logical expectation of the answer of "how attractive is the coral reef in Canada" should be the least category, which should be close to -2. Among all 240 PIVC, 213 (88.8%) of them had evaluated "coral reef in Canada" at the mean of 0.35 and the standard deviation of 1.163. The average response rate of the perception of the other attributes is also at 88.8%. Every respondent who evaluated the perceptions of other attributes evaluated the perception of "coral reef in Canada" and the overall evaluation of "Canadian coral reef" was at the high of 0.35 (neutral to somewhat attractive). These facts showed strikingly low level of precise knowledge of tourism in Canada. Less than 20% of these respondents had indicated an answer either as "not very attractive" or "not at all attractive"; this reflects that respondents have a generally positive image of tourism in Canada.

Through the survey process during the conversation afterwards with respondents, the researcher had generated numerous comments on interest to visit "interesting and friendly Canadians." The attribute of "interesting and friendly Canadians" was designed to test people's perception on the friendliness of the tourism environment, thus as a travel issue. However, the comments generated had indicated that respondents had interpreted this as a specific attraction of visiting Canada. It is not

certain that how many respondents had understood it as which aspect; thus this attribute had to be dropped from the travel issue group in the following IPA analyses because of the ambiguous interpretation. The scores from the 30 attributes, originally scaled from "1" to "5", were recoded into "-2" to "2" for a more logical interpretation of the result as "0" representing the neutral evaluation of the importance and performance of Canada.

The literatures suggest that salient attributes should not be analyzed in the same IPA with goal oriented attributes because of the difference in nature of the evaluation of these attributes (Oh, 2000). Recall the criticism of IPA in Section 4.2.2, salient attributes are more likely to be evaluated better performed than the actual performance, while goal oriented attributes are more likely to be evaluated more important than the actual importance. This is due to the multidimensional nature of the definition of importance, which has existed since the invention of IPA studies. Therefore, in this study, travel issues attributes that are important to a purchase decision (salient attributes) are analyzed separately from those goal oriented attributes which indicate tourism attractions.

5.5.1 Travel Issues

Eleven travel issue attributes were analyzed in this section. Statistics of the travel issues, including the mean of importance, standard error of importance, ranking of importance, mean of performance, standard error of performance, and ranking of the performance are provided in the following Table 5.6 Importance and Performance of Travel Issues

Table 5.6 Importance and Performance of Travel Issues

Importance				Performance			
Travel Issues	**mean**	**SE**	**rank**	**Travel issues**	**mean**	**SE**	**rank**
Personal safety	1.64	0.049	1	Personal safety in Canada	1.33	0.064	2
Outstanding scenery	1.46	0.048	2	Canadian scenery	1.39	0.050	1
Ease of obtaining a visitor visa	1.43	0.239	3	Obtaining a visitor visa from Canada	0.79	0.080	6
Inexpensive travel in the country	1.23	0.064	4	Expenses traveling in Canada	0.68	0.840	7
Standards of hygiene and cleanliness	1.20	0.055	5	Hygiene and cleanliness of Canada	1.07	0.062	4
Inexpensive travel to the country	1.13	0.590	6	Expenses traveling to Canada	0.65	0.840	9
Reliable weather	1.09	0.050	7	Canadian weather	0.67	0.057	8
Environmental quality of air, water, and soil	1.05	0.061	8	Quality of air, water, and soil in Canada	1.07	0.063	3
Non-stop flights to the country from China	0.73	0.078	9	Non-stop flights to Canada	0.82	0.750	5
Mandarin as widely spoken language	0.28	0.084	10	Mandarin speaking environment in Canada	0.37	0.080	10
Presence of Chinese in the country	-0.25	0.082	11	Presence of Chinese in Canada	0.05	0.080	11
Spearman Rank Order Correlation				$\wp$=0.688	p=0.019		Two-tailed

In terms of individual attribute's importance, personal safety is the leading important travel issue at the mean of 1.64, which represents "important" to "very important" leaning toward the latter. It is noticed that only the issue of the presence of Chinese had ranked below zero, which showed the respondents are comfortable in the non-Asian environment.

In terms of individual attribute's performance, the respondents had all positive perception of Canada, especially in attributes such as Canadian scenery, personal safety in Canada, environmental

quality of air, water and soil in Canada. The presence of Chinese in the country had ranked least

attractive among all, followed by the existence of Mandarin speaking environment in parts of Canada.

Based on the data in Table 5.6, an IPA grid is created as shown in figure 1.

Figure 5.1 IPA Grid-Travel Issues
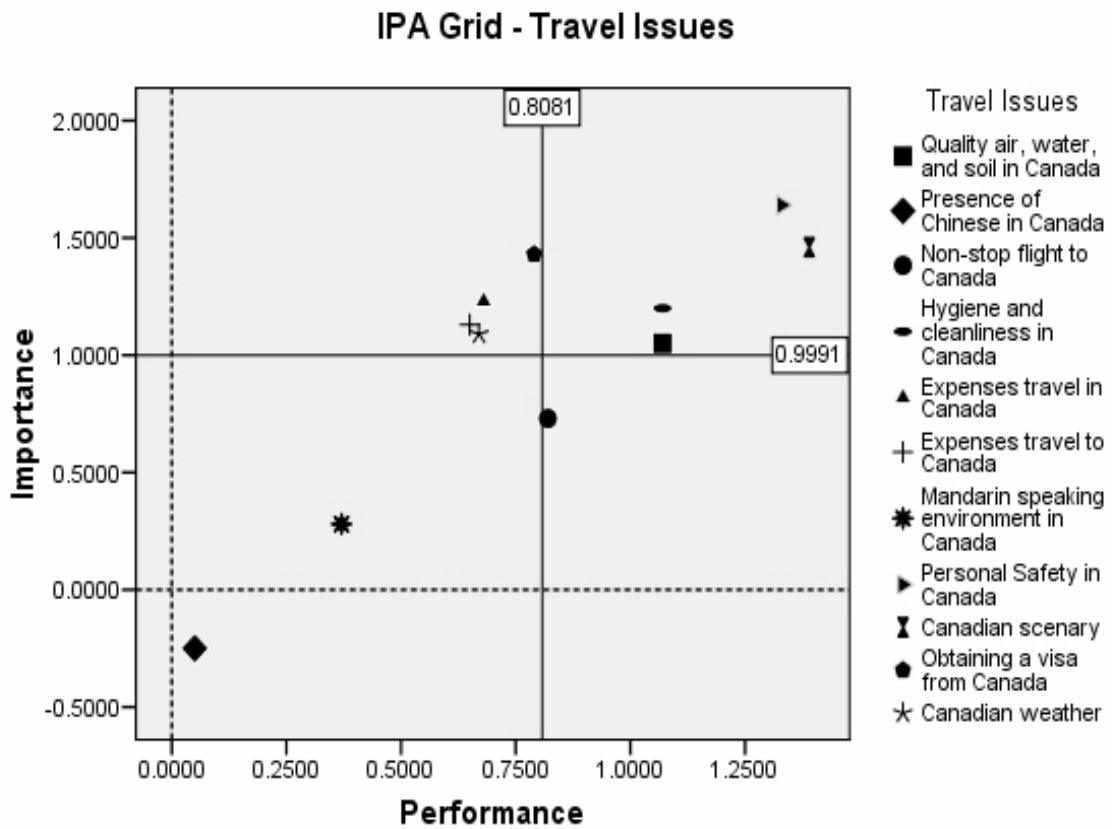
To interpret at the scale mean as the first step, the grid shows that the presence of Chinese in the

country has fallen into the reduce attention quadrant because of it low importance and high

performance. The rest of the attributes were all perceived as above average attractively. However, to

look at the relationship among the attributes by interpreting at the actual mean cross-hair, the result

shows that non-stop flights to Canada have its relatively low importance and high performance,

therefore attention on this attribute should be reduced with consideration. Four attributes had

appeared in the need-improvement quadrant; the perception of expenses of traveling in Canada, expenses of traveling to Canada, and Canadian weather are located relatively closer to the cross-hair, which means they do need improvement however not as much as the perception of visitor visa. The issue on obtaining a visa from Canada showed greatest need for improvement because of its high ranking of importance and low ranking of performance. Among the four perceptions located in maintain-the-good-work quadrant, quality air, water, and soil in Canada is located very close to the cross-hair, which signify the possibility of attention may be needed in future promotion. Cautioned action should be taken toward this issue. Personal safety in Canada, Canadian scenery, and hygiene and cleanliness of Canada are perceived quite well, thus should maintain the good work.

5.5.2 Tourism Attractions

Statistical data of the 19 tourism attractions were illustrated in Table 5.7 Importance and Performance of Tourism Attractions.

Table 5.7 Importance and Performance of Tourism Attractions

Tourism Attractions	Importance			Performance		
	mean	SE	rank	mean	SE	rank
Small towns and villages	0.74	0.065	1	0.89	0.061	2
Wilderness and undisturbed areas	0.65	0.079	2	0.99	0.060	1
Beaches for swimming and sunning	0.59	0.068	3	0.41	0.074	9
Local cuisine	0.57	0.070	4	0.19	0.070	15
Museums and art galleries	0.56	0.074	5	0.69	0.216	4
Chance to see wildlife and birds I don't usually see	0.54	0.076	6	0.66	0.072	5
Local crafts	0.44	0.077	7	0.46	0.072	6
Historical, archaeological, or military sites	0.41	0.076	8	0.35	0.080	11
Local festivals	0.39	0.074	9	0.30	0.075	12
Mountainous areas	0.34	0.075	10	0.73	0.070	3
Shopping	0.31	0.076	11	0.35	0.171	10
Big modern cities	0.20	0.074	12	0.43	0.075	7
Amusement or theme parks	0.17	0.075	13	0.41	0.079	8
Whale watching	0.13	0.075	14	0.27	0.077	13
Nightlife and entertainment	-0.01	0.078	15	0.04	0.138	17
Wineries	-0.04	0.076	16	0.10	0.079	16
Skiing	-0.06	0.081	17	0.21	0.085	14
Golf	-0.65	0.081	18	-0.45	0.081	18
Visiting casinos and gambling	-0.75	0.089	19	-0.64	0.090	19
Spearman Rank Order Correlation	$\mathcal{P}$=0.754	P<0.001		Two-tailed		

There were no important attributes evaluated as "very important"; however, in the evaluating of travel issues, eight out of eleventh attributes had evaluation as "important" to "very important." The same situation occurred when compared the performance of the tourism attractions to travel issues. The commonality illustrated the inter-influential effect in the group of salient attributes and in the group of goal oriented attributes; thus proved that comparison among each individual group of

attributes are more appropriate than to compare the attributes at the grand level.

As the importance ranking of these tourism attractions showed that small towns and villages are ranked at the top at mean of 0.74 as "neutral" to "important" leaning toward "important", followed by wilderness and undisturbed areas, beaches for swimming and sunning. The performance ranking list of tourism attractions (Table 2) illustrated respondents perceived the "neutral" to "attractive" level of attractiveness among all attraction attributes, except golf, and visiting casinos and gambling. Wilderness and undisturbed areas in Canada were perceived most attractive among all, followed by small towns and villages, and mountainous areas. The IPA grid of tourism attractions are presented in figure 5.2 IPA Grid – Tourism Attractions

Figure 5.2 IPA Grid – Tourism Attractions

IPA Grid - Tourism Attractions
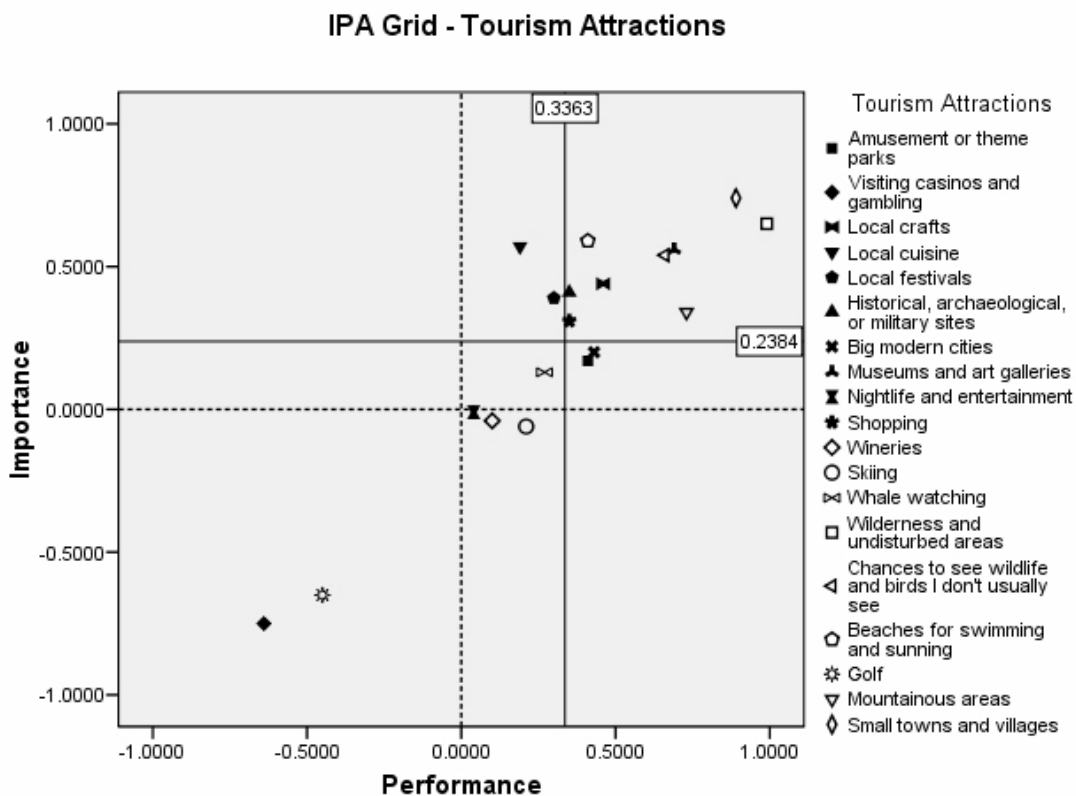
To simply considering the importance versus performance, the grid showed that most of the attractions had been perceived well, thus should maintain the good work. Two attractions, visiting casinos and gambling, and golf, are perceived with lower priority. Skiing, visiting wineries, and nightlife and entertainment in Canada are perceived as low importance and high performance which should be considered to reduce attention on these attributes.

Oh (2001) suggested that unfamiliar attributes are commonly ranked with lower performance scores compared to its actual importance scores. The performance rankings of skiing and visiting wineries, supports the above statement. It is not surprised that unconventional activities (skiing and visiting wineries) are listed at the bottom of the importance list. Even though there has been some development of these activities in the last few years, for example skiing is rapidly expanding in Harbin, China (Tourism Administration of Harbin, 2006); the responses from this survey illustrate that these unconventional tourism attractions are still not perceived popularly among Chinese participants. The result shows that the performance of these activities is at possible reduce-attention quadrant closely to the cross-hair; however, with the rapid increasing of the popularity of these activities, it is questionable that whether managers should overlook or reduce attention in the attempt of promotion these attractions.

It is questionable why the respondents had reported visiting casinos and gambling being the least important attributes (m=-0.75) and the performance attributes (m=-0.64). Gambling, as an illegal activity regulated by the Chinese government, is recognized as a serious addiction reflecting a non-enterprising personality in the Chinese community, even though underground gambling commonly appeared in China. It is questionable that whether the respondents had reported their actual desires of gambling and visiting Casinos, or rather to report the proper and ethical answer for this question.

Even though through the survey process, it is repeatedly indicated that this survey is anonymous, there are no clear indicator to differentiate the result at the analysis stage. However, the increase of Chinese tourists in gambling destinations can assist in determine the true desire of Chinese tourists.

Macao, as the "Vegas of Asia", only accommodated 2.2 million visitors from Mainland China in 2000. The statistics have rising up to over 10 million in 2005 and nearly 12 million in 2006 (DSEC, 2007). The average increase rate of the Chinese visitors is at 33.2%. These facts are contradictory to the result of importance evaluation in this study, which presents the possibility that visiting Casino is an important tourism attraction however adjusted in the respondents' answers. The degree of the true importance of this attribute will determine its true location on the grid. If it is less important than average, it is at low priority and scarce promotional resources should not be allocated to this attribute. However, if it is at high importance and the current low performance, two possibilities occur. One is that Canada is perceived with a poor performance on this attribute; therefore, there should be reduced attention on this attraction in the future promotion. The other possibility is that Chinese tourists lack knowledge that Canada features good casino and gambling attractions; therefore, increasing promotion on casino and gambling may create a new market segment in Mainland China. Management decisions on the casino and gambling attractions toward Chinese consumers should be carefully considered.

Marketing decisions should also consider the relative performance among the group of tourism attractions. In this case, after dividing the grid by the actual means of the attributes, two more attributes had fallen into the reduce attention quadrant: amusement or theme parks and big modern cities. Even though respondents perceived these attractions as important; they are relatively unimportant among all the tourism attractions; therefore, attention could be reduced with caution when the situation of scarce promotional resources apply.

Individually, the nightlife and entertainment in Canada was perceived with a low degree of attractiveness and a slightly lower than neutral of importance. However, comparatively, it shows low degree of importance and unattractiveness; thus, it could be considered with low priority. Similarly, whale watching was perceived somewhat important and somewhat attractive individually; however comparatively, it obtains low importance and perceived unattractive, thus resources should be deferred to attractions requires more urgent improvement.

Though local festival and local cuisine were perceived attractive individually; compared with other attractions, it is clear that these attractions should obtain more promotional resources because of comparably low attractiveness, especially local cuisine. A number of attributes are located in the keep-up-the-good-work quadrant as showed in figure 5.2, they were perceived attractive and evaluated important. However, close examination of the spread of these attributes suggests that human developed attractions are located close to the cross-hair thus are less important and less attractive; these attractions include historical, archaeological or military sites, local crafts, and shopping. In fact the grid had shown an interesting of clustered human developed attractions and a wide spread of nature based attractions.

To further discuss whether a relationship does exist between human developed attractions and nature based attractions, the attributes were divided into two groups based on the logic. Concerns existed on the nature of small towns and villages; because of the more country side scenery image proposed by the wording of this attraction, it is decide to be a nature based attraction. To signify the differences between two groups, human developed attractions are plotted with filled markers on the grid, and nature based attractions with empty markers.

The performance importance differences (P-I) were computed on the nature based attractions (n=8) and developed attractions (n=10). A paired sample t-test (two tailed) was performed on the

performance importance differences. The performance importance gap of the nature based attributes is significantly larger than the performance importance gap of the developed attributes (t=-.3.266, p=0.001, df=214). Since the possibility of low perception caused by low familiarity of the attraction mentioned above, visiting wineries and skiing are taken away from consideration of the relationship between two groups. Through the location of two groups of attributes, it is clear that nature based attributes perceived more attractively than the human developed attributes, which in align with the result from the content analysis in research question four.

5.5.3 Travel Issues versus Tourism Attractions

To compare the two groups of travel issues and tourism attractions in terms of their degree of association between performance to importance, performance and importance differences were computed, and later compared through a paired sample t-test. The result showed that the performance importance gap of the travel issuers group (MD=-0.2046, SD=0.5673) is significantly smaller than the performance importance gap of the tourism attractions group (MD=.0974, SD=0.4402), t (214) =-6.666, p<0.001.

In summary, this section has examined the respondents' perception toward two groups of image attributes in terms of their importance and performance. The importance scores had showed the evaluation of a certain attributes, while the performance scores illustrated the respondents' perception of how attractive Canada is on that attribute. The results showed that respondents evaluated Canada fairly positively (neutral to attractive) in the group of travel issues and the group of tourism attractions. However, statistics showed that performance of the travel issues groups are more closely associated with their respected importance, thus greater promotional resources should be allocated to the tourism attributes group.

Among the travel issues, attention on the promotion of presence of Chinese in Canada should be

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reduced. The perception of non-stop flights to Canada are relatively well, but attention should be reduced with caution; the expense factor both travel to and travel in Canada and the promotion on the Canadian weather should be improved other than the urgent improvement on the condition of obtaining a visitor visa from Canada.

Among the tourism attractions, the promotion on skiing, visiting wineries, nightlife and entertainment are in the reduce-attention quadrant; the promotion on amusement or theme parks and big modern cities are relatively not important, thus attention may be reduced from the promotional strategies. Improvement is urged in promotion on Canadian cuisine and Canadian festivals.

The issue of high correlation between importance and performance has existed since the invention of IPA technique. The correlation on the two IPA in this section are around 0.7 level, which is at the same level compared with the previous studies, such as Ryan and Huyton's data (from Oh, 2001). However, the large standard error of each attributes (see table 5.6 and 5.7) alarms the high variance nature of each attributes appeared on the IPA grid. Marketing decisions derived from the grids should be considered carefully because of the high variances of response.

5.6 Research Question Six

What are the preferences of Chinese consumers who are interested in Canada in terms of season of travel, length of trip, sightseeing, accommodations, transportation, food, budget, pace of the trip, quality versus low price, travel alone versus group tours, and information sources?

To examine the preference of Chinese consumers, participants were invited to respond to a number of questions related to the trip attributes mentioned in the research question. The majority of the questions invited participants to identify as many answers as relevant; these questions are travel season, trip length, preferred sights, transportation, accommodation and food; results are recorded in Table 5.8 Results of Multiple Choice Questions. Four single-choice questions are budget, tour pace, tour category, and information sources. The result of information sources are recorded in Table 5.9

Information Source. The data generated from these participants were later summarized to structure an image of a desirable trip to Canada. The following section reports the finding of each question according to the orders on the questionnaire Section IV.

5.6.1 Travel season

As illustrated in Table 5.8, the preferred season for a tour in Canada is the fall (38.6%), according to the response from respondents who are interested in Canada, followed by the summer (32.6%). With the image of a cold country full of ice and snow, it is not surprising that winter is the least favorite season for touring Canada. Fall in Canada is always described as picturesque; provinces noted for their fall foliage, such as Ontario, typically use fall colors as an image in promoting the destination. The fact that respondents who showed interested in visiting Canada had specific interest in fall supports the assumption that these respondents have some knowledge of tourism in Canada.

Table 5.8 Results of Multiple Choice Questions

	f	%		f	%
Season			**Length**		
Fall	115	38.6%	2-week	123	48.6%
Summer	97	32.6%	1-Week	48	19.0%
Spring	53	17.8%	3-week	46	18.2%
Winter	33	11.1%	>4-week	21	8.3%
			4-week	15	5.9%
Total	298	100.0%	Total	253	100.0%
Sights			**Accommodation**		
Northern lights	163	12.4%	B & B	111	29.4%
River Lakes	163	12.4%	3-star	76	20.2%
Parks	161	12.3%	Youth Hostels	48	12.7%
Seacoasts	157	11.9%	Historical Inns	33	8.8%
Small Towns	140	10.7%	4-star	33	8.8%
Mountains	131	10.0%	Motel	30	8.0%
Historical	117	8.9%	5-star	29	7.7%
Museums	111	8.4%	2-star	11	2.9%
Modern Cities	98	7.5%	1-star	6	1.6%
Bethune's memorial	73	5.6%			
Total	1314	100.0%	Total	377	100.0%
Transportation			**Food**		
Motor Coach	129	39.8%	Mix of Chinese and Western	92	28.8%
Rental Cars RV	80	24.7%	Variety of Food	148	46.3%
Trains	65	20.1%	Chinese Only	40	12.5%
Bus & Subway	38	11.7%	Western Only	40	12.5%
Taxis	12	3.7%			
Total	324	100.0%	Total	320	100.0%

5.6.2 Preference of group tour or visiting individually and the reason

Besides the 5% missing answers, one hundred and forty five respondents showed their interest of joining a tour group (60.4%); there were 93 comments reported by 89 of those respondents. Content analysis had showed that the number one reason of joining a tour group is the "trouble-free and worry-free traveling" (n=43), followed by "safe and secure trip" (n=20), "more economical way of traveling" (n=8) and the "better understanding of the area" (n= 6). Other factors that motivated respondents to join a tour group include "enjoy the atmosphere of traveling with a group" and "formalized organized service". Obviously respondents are most afraid of planning and organizing the trip as well as logistical issues.

Respondents who are willing to travel alone represent 34.6% of the over all PIVC sample (n=83). Among the 72 comments generated from 62 participants, the dominant reason of traveling alone is the "freedom from the tour scheduled" (62.5%). "Flexibility" (n=8) and "more travel time on sights" (n=8) are also leading contributing factors. Tour respondents had indicated they would not travel in group because they will be visiting friends and relatives in Canada.

5.6.3 Preference for Trip Length

As illustrated in Table 5.8, participants were invited to indicate their preference for trip length, given set categories ranging from less than 7 days to more than 28 days. The results showed that most people preferred to travel 8 to 14 days (48.6%), followed by less than 7 days (19%) and 15 to 21 days (18.2%). Few respondents had interest in visiting Canada more than 28 days (5.9%). The findings from CTC (2006) suggested a preferred length of trip at seven to ten days which is similar to the result of this study.

Three respondents verbally expressed their interest in visiting friends or relatives in Canada for more than four weeks; as well, eight respondents had expressed that "Canada is so big; a few weeks

are definitely not enough time to see all". This statement showed some tendency to tour Canada once and for all. Obviously, with the considerations of price and distance, touring Canada can be recognized as a once of a life time event; Canada, is still not considered as a feasible frequent tourism destination to these respondents.

5.6.4 Preference for Tourism Sites

As illustrated in Table 5.8, respondents were invited to identify as many tourism sights as desired from a closed-ended list. The list included northern lights, river and lakes, parks, seacoasts, small towns, mountains, museums, modern cities, Bethune memorial house, and "historical, archeological, and military sights" (HAM). Northern lights (n=164), river and lakes (n=163), and national parks (n=162) are the most desirable sights, followed by seacoasts (n=157), small towns (n=140), and mountains (n=131). The cultural sights, including the historical, archeological, and military sights (n=117), museums (n=112), modern cities (n=98), and Bethune memorial house (n=73), are all at the bottom of the preference list.

This result is consistent with the IPA finding that natural attractions are more often demanded by potential Chinese tourists and that Canada is distinguished by high quality natural attractions.

5.6.5 Accommodation Preference

As illustrated in Table 5.8, the potential types of accommodation examined in this study are: bed-and-breakfast, youth hostels, motels, historical hotels and inns, and hotels ranging from one star to five stars. The results showed that close to half of the respondents are interested in bed-and-breakfast (n=112), followed by 3-star hotel (n=76), and youth hostels (n=48), which are the entire middle price ranged accommodation. Hotels as conventional accommodation are ranked at the bottom of the list despite the differences of quality, 1-star hotel (n=6), 2-star hotel (n=11), and 5-star hotel (n=29); this fact showed that PIVC are seeking experiences rather than specific services only.

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The most preferred type of accommodation provided by tour companies is hotels. Many factors contributed to this situation, such as reliable service, availability, price, and quality control. However, the preferences of respondents illustrate a difference from the market norm. Unconventional accommodations including bed-and-breakfast, youth hostels, and historical hotel and inns, appeared in the China only around late 1990s. Generally, bed-and-breakfasts can provide an opportunity for guests to get to know local hosts on a personal level; however, in the case of Chinese tourists visiting Canada, there is the issue of language barrier and culture differences. One may question the fact that bed-and-breakfast being the most preferred accommodation type. Several factors may contribute to this fact:

1. The potential Chinese tourists sampled in this study are highly educated. Over 80% of the respondents have at least a Bachelors degree, and English training as second language is mandatory to most of the universities in China. Therefore, a language barrier may not be a great concern of these potential Chinese tourists.

2. Potential Chinese tourists had shown their great interest in Canadian culture and lifestyle, and their fairly low interest in a familiar environment with presence of Chinese and Mandarin speaking environment, as illustrated in section 5.5. These evidence supports that potential Chinese tourists are looking for cultural diversity; thus cultural differences may not be a barrier either.

Therefore, trips featuring bed-and-breakfasts may be more attractive to Chinese consumers who are interested in Canada. The general size of bed-and-breakfasts determined the size of the tour groups it can cater, which is small to medium size groups. If ADS is granted to Canada, large tour groups would not be able to use bed-and-breakfast accommodations, even it was favored.

In addition, to most tour groups, selecting bed-and-breakfast as its accommodation choice in

Canada may lead to many complications not only including lack of availability, but also the illegal immigrant concern. There are numbers of Chinese illegally escape the country every year; Canada, the United States, Australia, and some parts of Europe are all famous countries to these illegal immigrants. Tour companies who are responsible to lead the tour group cross the border also have the responsibility of leading the group back; companies who lost more than average number of group members will suffer from a damaged business reputation both in the Chinese tourism market and to the Canadian embassy in China. This may result a low designation of visitor visa to clients from these tour companies, which directly affects their profit and potentially their survival. Therefore, how to secure and safe guard tour group members back to China is serious concern to tour companies and their employees; international tour guide are required special training in safe and secure group members. Bed-and-breakfast accommodation, compared to standard hotel, features more difficulty in controlling and possibility of escaping. It is questionable that the possibility of the respondents' preference of bed-and-breakfast would be matched in tourism operations.

5.6.6 Transportation Preference

As illustrated in Table 5.8, five alternatives were provided to respondents on the preference of mode of transportation: motor coach, rental cars and RV, trains, bus and subway, and taxis. It is noticed that close 40% of the respondents preferred motor coach as their mean of transportation (n=129), which is consistent with the large percentage of participants who are interested in group tour. This is under the general assumption that tour groups will adopt motor coach as its main transportation mean.

Close to a quarter of the respondents preferred rental cars and RV (n=80). Traveling by cars is increasingly popular in the Chinese tourism market, thanks in part to the increasing number of citizens who owned vehicle. National Bureau of Statistics of China (NBSC) (2007) had reported that in private-owned automobile increasing rate is at 24.0% from 2000 to 2005. In five years, the total

number of automobiles had increased 1.37 times. The result of over a quarter of respondents showed favoritism in rental cars and RV is an excellent proof of the changing of market demands attributable to improved living standard.

5.6.7 Preference of Cuisine

As illustrated in Table 5.8, the most favorite type of cuisine on trip is "a variety of food" (Italian, French, Thai, German, etc.) at the frequency of 46.3% according to the respondents, followed by a mixture of Chinese and Western food (n=37). The result suggests that respondents are rarely interested in only Chinese cuisine or only western cuisine on the trip.

5.6.8 Preference of quality versus money value

To test the preference of quality versus money value, a choice between two alternatives of group tours were provided to the participants:

A - A tour offering a low price but without assurances of good quality

B - A tour with a guarantee of good quality but at a higher price

The wording of this question is designed to examine the possibility of any participants who will trade-off the assurance of a good quality tour for a lower price.

The results showed a lower preference for alternative A (lower price), to alternative B ratio (good quality) at 1:2.4, which indicates that about 30% of the respondents were willing to risk lower quality for a cheaper price. This interesting finding had illustrated that the majority of Chinese tourists will not trade quality off for low price, while one third of the Chinese tourists are very price conscious. CTC (2006) had also indicated that Chinese tourists are extremely price conscious, which is agreed with the finding from this study.

5.6.9 Preferences for Trip Price and Travel Pace

Respondents were questioned on their preferred price range of a tour to Canada ranging from less than 5,000 RMB to over 30, 000 RMB (5,000 RMB per range). The results show that 37.9% of the participants favored 5,000 to 9,999 RMB range, followed by 10,000 to 14,999 RMB (32.1%) and 15,000 to 19,999 RMB (9.6%).

The budget of a trip to Canada can be simplified into two major categories: the expense of traveling to Canada (return airline tickets) and the expense of traveling in Canada (hotels, ground transportation, food, etc). The traveling expense in Canada varies from the length of the trips; the average spending in Canada per trip by Chinese tourists are $1,800 in 2004 (Statistics Canada, 2007). The lowest fare quoted by Air Canada for a two-week round-trip from Beijing, China to Toronto, in October 2007 was $1,210 Canadian dollar (low season fare). The equivalent of the total travel expense in RMB is 20,020.21 RMB. The fact that over 93.0% of the respondents had indicated a travel budget less of 20,000 RMB showed that the serious concern of affordability of a trip to Canada, which is consistent with the results from the preference of quality versus money value finding.

It is obvious that a trip to Canada is only for a few Chinese consumers. Recall the sample frame, the participants selected in this research were those Chinese who were traveling to international destinations; or who were a family member of the passenger traveling internationally. They were under the assumption that their household had the ability to afford international traveling. Even under such framework, only 7% of the participants had reasonable expectations of a trip to Canada; this fact showed the possibility of only a small Chinese target market for Canadian tourism industry. This encourages future research in market segmentation with special attention to affordability. CTC (2006) estimated a potential market of 2.8 million Chinese in four high income cities - Beijing, Shanghai, Guangzhou, and Shenzhen. Compared to the overall 1.3 billion population in China, 2.8 million is a very small proportion of Chinese tourism market, which explains the only 7% of

participants with reasonable budget expectations.

In terms the travel pace, 42.1% of the respondents (n=101) had interest in a slow and relaxing speed, which is at lead. A fast travel pace to visit many sights is the least favorite at 8.8% (n=21).

5.6.10 Information Source

A list of possible information sources was identified and participants were asked to indicate their degree of usage on each of the information sources. The result is interpreted in Table 5.9 Information Source.

Table 5.9 Information Source

Info Source	Never/Rarely	Sometimes	Often	Missing	Total
Friends and Relatives	17.9%	35.4%	39.2%	7.5%	100.0%
Guide Books	30.4%	32.1%	30.4%	7.1%	100.0%
TV Advertisements	52.5%	30.0%	8.8%	8.7%	100.0%
TV travel shows	42.5%	35.8%	13.3%	8.4%	100.0%
Newspaper ads	48.8%	31.3%	10.0%	9.9%	100.0%
Newspaper travel stories	58.3%	26.3%	5.8%	9.6%	100.0%
Consumer travel shows	67.9%	17.5%	4.2%	10.4%	100.0%
Travel agencies	30.8%	29.2%	32.1%	7.9%	100.0%
Official tourism websites	31.3%	30.8%	29.2%	8.7%	100.0%

The results illustrate that friends and relatives, travel agencies, travel guide books, and official tourism websites are the most frequently used information sources respectfully. Consumer travel shows, travel stories in newspapers, tourism advertisements on TV, and advertisements in newspapers are the rarely used among the generated information sources. The finding from CTC (2006) stated "Television is a highly influential medium in China"; the usage of television as information source has been illustrated as never or rarely in this study, which is not in support of the CTC's finding.

In summary, to these respondents who are interested in Canada, a most desirable trip to Canada is a

slow-paced group tour of two weeks in the fall; features bed-and-breakfast as accommodation; motor coach as transportation; nature based sights at majority; priced around 10,000 RMB and providing food of various cultures. The majority of these demands could be met easily by planning the tour according. Even though clearly the preferred budget of a trip to Canada is too low to cover the basic costs of airfare, it is understandable that there is still a marketable size of potential Chinese consumers (CTC, 2001a; 2006). The findings of this section provide some insight of the general travel preference of Chinese consumers.

Promoting Canada as a tourism destination or Canadian tourism products, on the other hand, needs to focus on conventional sources of word-of-mouth, travel agencies, and travel guide books. To spend much on newspaper or TV advertisement may lead to an unsatisfied return on investment because of the low usage of those sources.

5.7 Research Question Seven

How the tourism image attributes of Canada promoted by Canadian Tourism Commission and its partners is perceived through promotional materials?

Content analysis of the current promotional materials in Canadian Tourism Commission Beijing Office was selected to assess the images of Canada as a tourism destination being promoted by the CTC and its partners. Promotional materials, 14 items in total, were collected from CTC's China Division in December 2005. Materials included brochures, a tourism map, and travel journals published by the CTC, provincial tourism offices, a tour operator, and magazines (Appendix C Promotional Material Inventory. At the time of the collection, these were the only promotional materials available in the Beijing office. Thirteen materials were published in Chinese - twelve in simplified Chinese characters and one in traditional Chinese character. Simplified Chinese characters were formed in 1949 and popularized through the education system by the Chinese communist party, it is the recognized official character in mainland China; traditional Chinese characters are still in use

in Chinese occupied regions outside of mainland China, including Hong Kong, Macao, and Taiwan.

One piece of material was published in English only. It was later rejected from the coding process because it was not prepared for the Chinese market. Though the potential Chinese tourists for Canada may obtain some English ability, the level of English efficiency is uncertain; thus the level of promotional power of English material is uncertain.

The contents of these materials were analyzed through a coding frame of "1" represents attractiveness, "0" as ambiguous, and "-1" as unattractiveness (please see section 4.3.1 for details on the coding frame). The comparison among the coding result from four individual coders (the researcher and three assistants) illustrated highly compatible results. The process resulted in a list of 31 attributes with cumulative frequency on each attributes identified, which illustrates the interpreted performance of the promotional materials in terms of identified image attributes; for the better interpretation, the total counts of each attribute are later standardized into log scores to the base ten. Two importance and performance grids were constructed: the grid on the travel issues and the grid on the tourism attractions; the importance ranking from respondents generated in the previous section is plotted as importance, and standard score of the performance count is plotted as performance.

5.7.1 Travel Issues

Through the content analysis, the cumulative frequency of all twelve travel issue attributes is 3,473, including frequency of 1,312 attractive incidents, 2,087 ambiguous incidents, and 74 counts of unattractive incidents. Table 5.10 Importance and Performance Scores on the Travel Issues, illustrates the individual attribute's total counts, attractive counts, and unattractive counts with their rankings among group and the scores of each attribute with the ranking.

The attribute of "local people" had been presented frequently through the promotional materials as the third highest ranking of all travel issues (n=190). Six incidents of unattractiveness counts existed

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because of the image showing too crowded on area, for example an image of Canadians staking on Rideau Cannel. As mentioned in research question five, during the survey process of generating importance ranking, it was noticed the existence of perception gap between the researcher and participants on the understanding of "interesting and friendly local people."

Table 5.10 Importance and Performance Scores on the Travel Issues

Importance			Performance					
Travel Issues	**mean**	**rank**	**Travel Issues**	**n=3473**	**A**	**U**	**SS**	**rank**
Personal safety	1.64	1	Personal safety in Canada	33	32	1	1.52	6
Outstanding scenery	1.46	2	Canadian scenery	451	451	0	2.65	1
Ease of obtaining a visitor visa	1.43	3	Obtaining a visitor visa from Canada	8	0	-8	0.9	10
Inexpensive travel in the country	1.23	4	Expenses traveling in Canada	24	1	23	1.38	8
Standards of hygiene and cleanliness	1.20	5	Hygiene and cleanliness of Canada	124	124	0	2.09	3
Inexpensive travel to the country	1.13	6	Expenses traveling to Canada	5	1	4	0.7	11
Reliable weather	1.09	7	Canadian weather	351	326	25	2.55	2
Environmental quality of air, water, and soil	1.05	8	Quality of air, water, and soil in Canada	114	114	0	2.06	4
Non-stop flights to the country from China	0.73	9	Non-stop flights to Canada	21	16	5	1.32	9
Mandarin as widely spoken language	0.28	10	Mandarin speaking environment in Canada	28	26	2	1.45	7
Presence of Chinese in the country	-0.25	11	Presence of Chinese in Canada	37	37	0	1.57	5
			Local People	190	184	6	N/A	N/A
Spearman Rank Order Correlation			$\mathcal{P}$=-0.300	P=0.433				Two-tailed

N: number of comments   A: attractiveness   U: unattractiveness   SS: standardized score

While "interesting and friendly local people" attribute is intended to reflect the importance of a friendly tourism environment as a travel issue attribute, comments of it being an attraction of Canada was noticed from some respondents through verbal communication after they filling in the survey. Since there is no clear percentage recognizing how many respondents had the understanding of it being a travel issue, this attribute is rejected from the importance ranking. Therefore it will not proceed in the importance performance analysis in this section.

Canadian scenery was been identified most frequently appeared in the brochures with total counts of 451, and all being attractive counts; this illustrates the presented attractiveness of scenery from the brochures. "Hygiene and cleanliness of Canada" and "quality of air, water, and soil in Canada" are all well presented through the brochures without any unattractive incidents. This is supported by the result from the content analysis of description of Canada which recommends that Canada is a "clean" and "environmental" country with "beautiful scenery". In agreement with "Canada has cold weather" from research question four results, the 25 counts of unattractiveness on Canadian weather came from the massive illustration of mountain tops with snow, which represented cold weather as not attractive. The all attractive counts of "presence of Chinese in Canada" is also supported by the description of "Canada is multicultural society, and many Chinese are living there"; two unattractive incidents occurred on the issue of "Mandarin speaking environment in Canada" which represents the concern of language barriers concluded from research question one "reasons of not visiting Canada." Supported by the statement of that "Canada is country at far," five incidents of unattractiveness of non-stop flights to Canada were counted because of the uncomforting over-twelve-hour trip on flight, even though it is the shortest travel length under current technology.

The concerns of the difficulty of obtaining a visitor visa (n=-8), the expensive cost of traveling in (n=-23) and traveling to (n=-4) Canada presented overwhelming unattractiveness counts compared to attractiveness counts. It is understood that even though the informative of traveling cost and process

of obtaining a visitor visa is provided, it yield an unexpected expensive and difficult image on these travel issues, which was illustrated greatly in the reasons of not traveling to Canada. The IPA grid on travel issues presented an insignificantly correlated relationship between the importance and performance of the brochures (P=-0.300, p=0.433). Based on the result presented in Table 5.10 Importance and Performance of the Travel Issues, an IPA grid is created to represent how travel issues are perceived from the promotional materials.

There is a fairly low performance of all travel issues except "Canadian scenery" "Canadian weather", "Quality air, water, and soil in Canada" and "hygiene and cleanliness in Canada". The reason of high counts is that the gorgeous scenery, beautiful shinny weather, crystal air, and neat streets can be illustrated through close to all the images appeared in the brochures. It is obvious that high performance would appear in these attributes because the objective of tourism brochures is to promote the destination. To further analyzing the rest attributes, the grid showed the "presence of Chinese", "mandarin speaking environment", and "non-stop flight to Canada" are located in low-priority quadrant. Agreed with the previous IPA on perceived image of Canada evaluated by Chinese respondents, expenses concerns both traveling to and traveling in Canada are in need of improvement, along with "obtaining a visa from Canada."

Figure 5.3 Travel Issues – Content Analysis
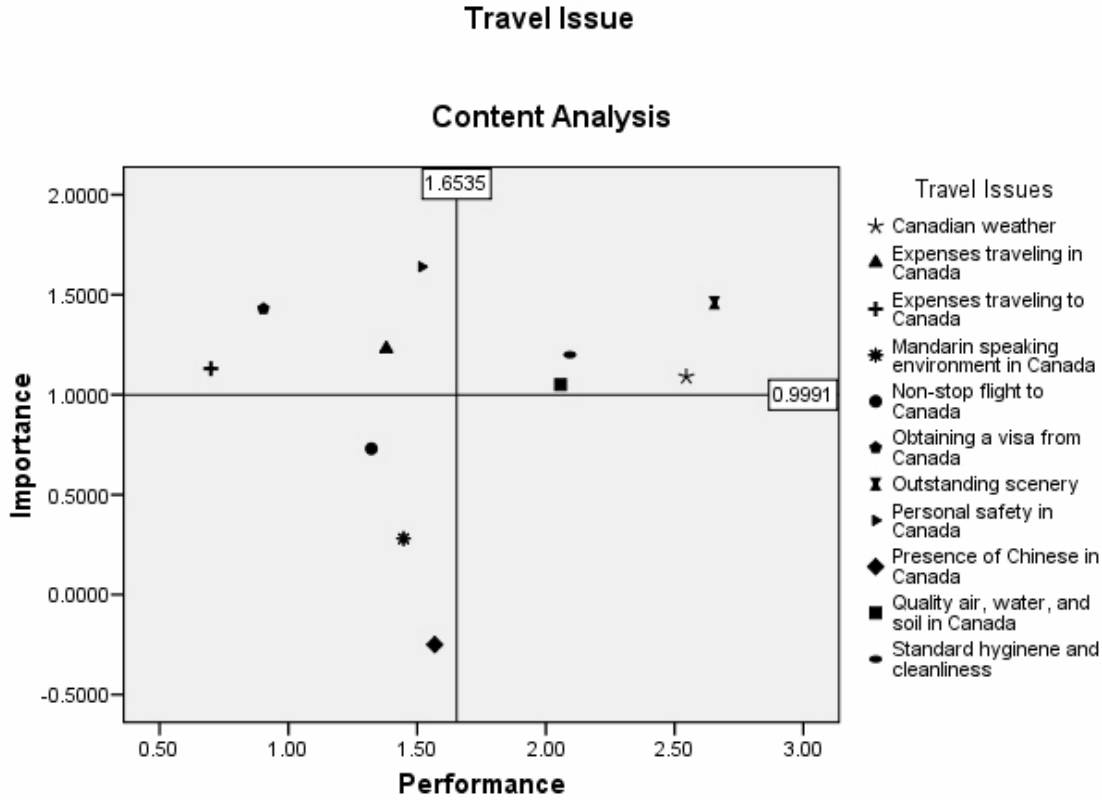
It is also important to see what tourism attractions are promoted through the brochures and what the relationship is between the perceived importance of these attractions to the performance.

5.7.2 Tourism Attractions

A total of 2,085 tourism attraction attributes images were tabulated. Table 5.11 Importance and Performance of the Tourism Attractions illustrates the individual attribute's count with their rankings among group and the standard scores of each attribute with the ranking (log scores to the base ten).

Determined by nature of the promotional materials, tourism attractions illustrated should all represent attractiveness of attractions. The count of unattractiveness in this section that showed the

only one incident of unattractiveness is shopping because the image showed an overcrowded shopping district. The rest of attractions all performed positively, thus there total counts are also their attractiveness counts.

The performance list showed a most number of "historical, archaeological, or military sites" featured in the brochures (n=273), while it is only the eighth importance attraction on the list according to participants. "Amusement and theme parks" appeared 160 times (2nd highest rank) while its importance ranking is only 13. These showed that there is a dramatic difference between the promotional focus of Canada than the importance ranking of attributes perceived by the Chinese consumers. Though there are four attributes with consistent rankings, mainly at the lower ranks: local festival (9th), shopping (11th), visiting wineries (16th) and visiting casinos and gambling (19th); the majority of the rankings is at significant differences. The table illustrates the significant differences between the rankings of importance and performance (p=0.378, p=0.110).

Table 5.11 Importance and Performance of the Tourism Attractions

Tourism Attractions	Importance		Performance		
	mean	rank	n=2085	SS	rank
Small towns and villages	0.74	1	136	2.13	6
Wilderness and undisturbed areas	0.65	2	101	2.00	12
Beaches for swimming and sunning	0.59	3	19	1.28	18
Local cuisine	0.57	4	136	2.13	5
Museums and art galleries	0.56	5	148	2.17	4
Chance to see wildlife and birds I don't usually see	0.54	6	160	2.20	3
Local crafts	0.44	7	67	1.83	14
Historical, archaeological, or military sites	0.41	8	273	2.11	1
Local festivals	0.39	9	128	2.11	9
Mountainous areas	0.34	10	129	2.11	8
Shopping	0.31	11	124	2.10	11
Big modern cities	0.20	12	130	2.20	7
Amusement or theme parks	0.17	13	160	2.44	2
Whale watching	0.13	14	38	1.58	17
Nightlife and entertainment	-0.01	15	127	2.10	10
Wineries	-0.04	16	42	1.62	16
Skiing	-0.06	17	94	1.97	13
Golf	-0.65	18	62	1.79	15
Visiting casinos and gambling	-0.75	19	11	1.04	19
Spearman Rank Order Correlation	$\mathcal{P}$=0.378	p=0.110		Two-tailed	

SS: standard score

For a better interpretation of the relationship between importance and performance, an IPA grid is created based on the data of Table 5.11. The grid illustrates the general low priorities of attractions "wineries", "golf", "whale watching" and "visiting casinos and gambling". However, to look at the relative performance of each attributes, not only the above four attributes, but also "whale watching"

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has fallen into the low priority quadrant.

Figure 5.4 Tourism Attractions – Content Analysis

Tourism Attractions

Content Analysis
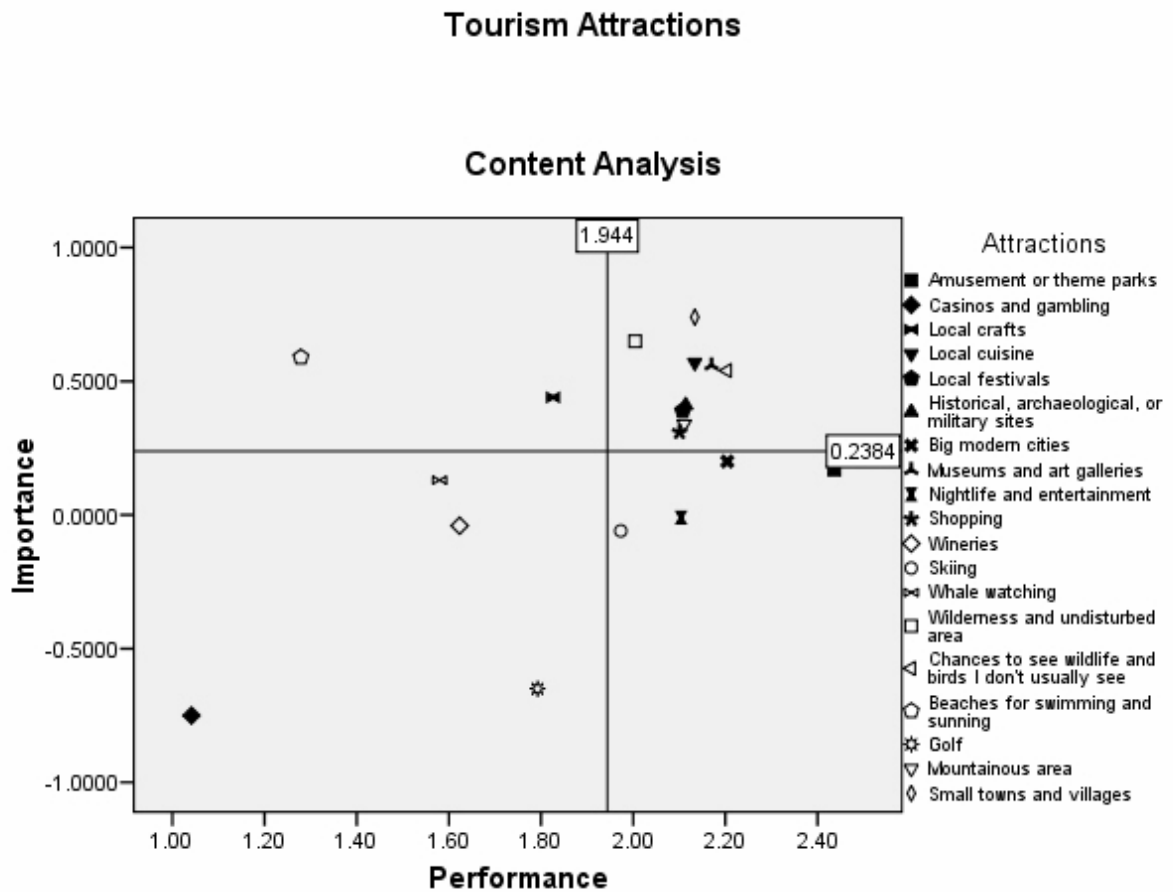
"Small towns and villages", "local cuisine", "museum and art galleries", and "Chances to see wildlife and birds I have never seen before" all performed very well, thus fall into the keep up the good work quadrant. Continue promotion should also focus on "wilderness and undisturbed areas", "historical, archaeological, and military sites", "local festivals", "shopping", and "mountainous areas" even though they have a relatively low importance compared to other attractions in the keep-up-the-good-work quadrant.

"Nightlife and entertainment" has performed generally well, yet not as important, thus attention should be reduced on this attribute. "Skiing" is appeared in the same quadrant. Attention on "big modern city" and "amusement or theme parks" should be reduced, even though they have a close relationship to the actual mean cross-hair.

The attractions of "beaches for swimming and sunning" and "local crafts" should be improved in future promotions toward potential Chinese tourist; "beaches for swimming and sunning" has a higher desperation among two attributes. To differentiate nature based attractions and developed attractions, developed attractions appeared at a frequency of 1304, which is 1.67 times of the frequency of nature based attractions (n=781). This is also well represented in the grid where empty markers (nature based attractions) largely spread in the low performance quadrants. It clearly illustrates the promotional focus of the developed attractions from CTC and its partners.

In summary, this section discussed how the image attributes had been promoted through the existing promotional material circulated through Canadian Tourism Commission Beijing Office. The grids showed a need of improvement in expenses traveling both to and in Canada, on the process of obtaining a visitor visa, and on the promotion of beach related attractions, local crafts, and the chances to see wildlife and birds one has never seen. It is also recommended that promotions on the developed attractions, "nightlife and entertainment", "big modern city", and "amusement or theme parks" should be considered carefully for less or no promotion attention for future promotional strategies according to the low importance of these attractions evaluated by respondents.

5.8 Research Question Eight

What are the coherences and gaps between the perceived images of Canada as a tourism destination held by mainland Chinese consumers who are interested in Canada and, to the other hand, the promotional image of Canada?

To fulfil the research purpose, this section will compare the description of tourism in Canada, the evaluation of current image of Canada, and the performance of the promotional materials by CTC, for any coherences or gaps. Comparisons are made on groups of travel issues attributes and tourism attractions, in coordination with the result from descriptions of Canada illustrated by respondents. Grids in comparisons are the perceived Canadian performance from the PIVC (market grid) and the performance of promotional Materials (product grid) based on the content analysis of these promotional materials. IPA grids are compared based on the attributes' distribution under a hypothesis of "if these materials were given to Chinese for promotion, would these build on the existed tourism image of Canada for the future benefit?" Applied to this study, if the promoted materials would build on the current image of Canada, attributes in the need-improvement quadrant in the market grid should locate in the keep-up-the-good-work quadrant in the product grid, because of the supposedly increased attention from the promotional materials. Attributes in the reduce-attention quadrant in the market grid should locate in the low priority quadrant in the product grid because of the supposedly reduced attention from the promotional materials. The change of location on attributes in the keep-up-the-good-work quadrant and the low priority quadrant are relatively less important because the perceived performance of Canada by the PIVC is according to attributes' importance.

Figure 5.5 Travel Issue Comparisons
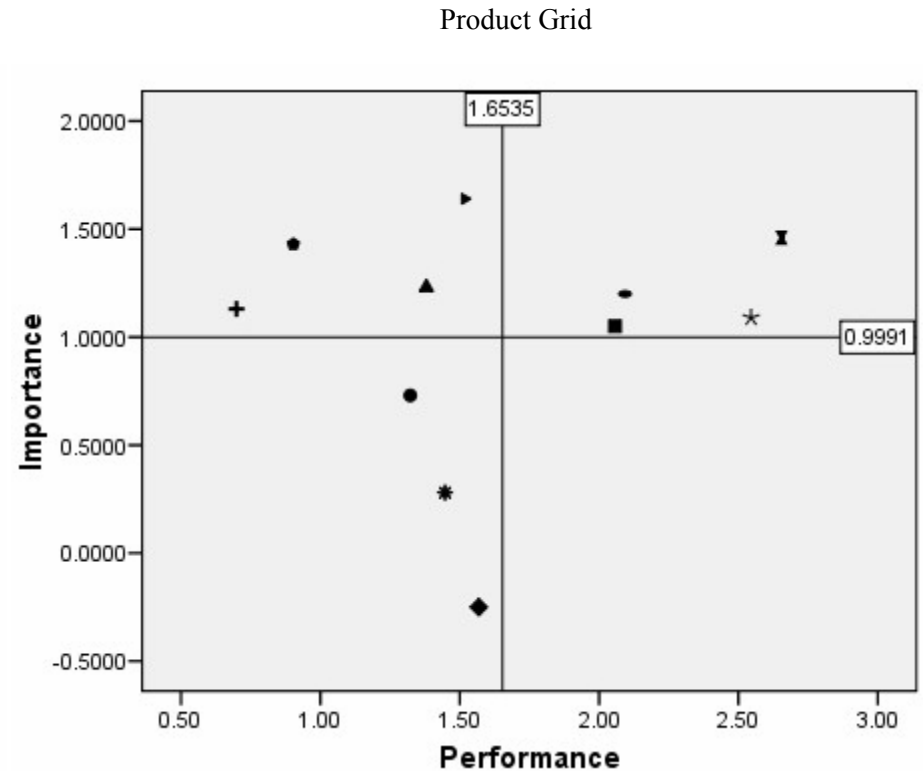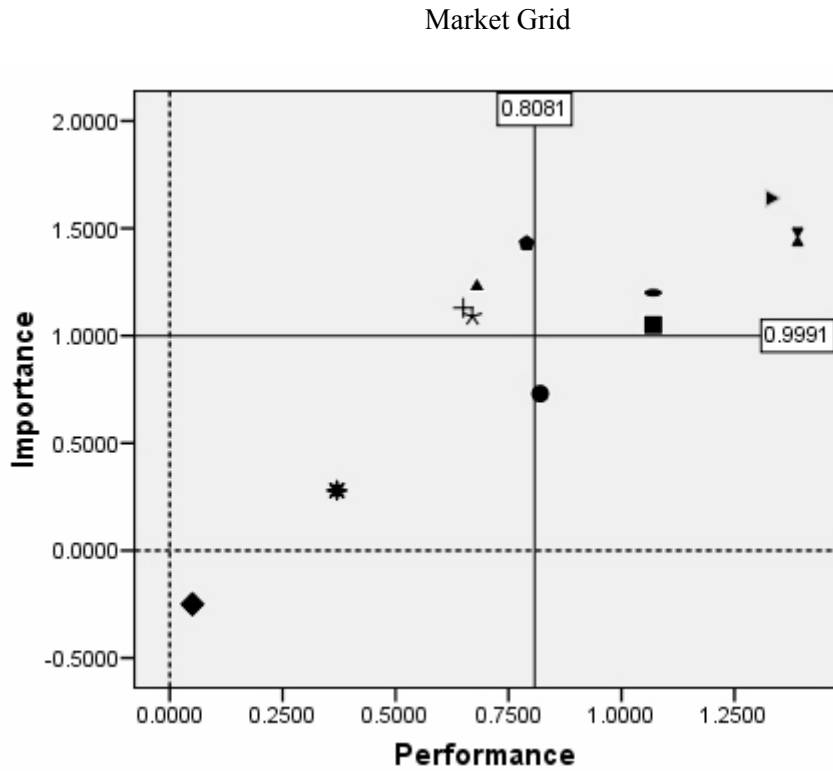
Market Grid

Product Grid

■ Quality Air, Water, and Soil in Canada	▲ Expenses travel to Canada	▶ Personal Safety in Canada
◆ Presence of Chinese in Canada	+ Expenses travel in Canada	⊢ Canadian scenery
● Non-stop flight to Canada	✳ Mandarin speaking environment in Canada	⬟ Obtaining a visa from Canada
▬ Hygiene and cleanliness in Canada		✶ Canadian weather

5.8.1 Assessment of Travel Issues

The grids displayed in Figure 5.5 Travel Issue Comparisons, illustrated close distribution patterns among the market grid representing perceived Canadian performance from the PIVC to, the other hand, the product grid representing perceived performance of promotional materials. Attributes located in the "keep up the good work" quadrant in market grid also locate in the same quadrant in the product grid; expect the attribute of "personal safety." According to the general description from respondents, Canada is a safe and secure country; thus less promotion on the personal safety in the material can be complimented by the already existed image of Canada. The change of location on personal safety would not threaten the tourism image of Canada if these materials were launched in promotion.

Both attribute "presence of Chinese in Canada" and "Mandarin speaking environment" are in low priority quadrant in the market grid, which also locate in the same quadrant in the product grid. Canada is recognized for its immigration opportunity to Chinese citizens; however, potential Chinese tourists do not evaluate the factors of familiar social or language environment as important for their future outbound travel. Therefore, the images or descriptive information on the presence of Chinese in Canada who can speak Mandarin should appear not as frequent, even though it does illustrate the friendly and welcoming Canadian tourism environment to Chinese tourists. The product grid had illustrated a lower priority of this fact.

"Non-stop flight to Canada" are in the reduce attention quadrant in the market grid which are in the lower priority quadrant in the product grid. There were six comments illustrated the fact of long distance between Canada and China among the overall 634 count of comments; no comments had been made on the flights to Canada. Whether the flight is non-stop does not seem to influence the decision of a future vacation in Canada, thus the promotion of this fact should be a low priority,

which is shown the performance promotional materials.

Three attributes should be improved in the market grid, according to the respondents, are: expenses travel to Canada, expenses travel in Canada, and obtaining a visitor visa. These attributes still locate in the same quadrant in the product grid. Comments related to the issue of expenditure had been mentioned 11 times. One can argue that no further actions could be proceeding toward these attributes. The reasons are:

1. Brochures' objective of promoting Canada as an attractive tourism destination, thus informative section such as process of applying visitor visa and the expense of traveling need to appear only once. With the low frequency, the performance would be evaluated relatively poor compared to other issues.

2. The cost of the trip would be beyond most people's budget. Price reduction is nearly impossible because of the relatively high airfares.

3. In addition the performance of obtaining a temporary visitor visa and the application length are solely relied on the performance of Immigration Canada, which would not be influenced in any way by any tourism company.

The above arguments are compelling, however the objective of promoting these attributes is to educate potential tourists for a realistic expectation of a trip to Canada; thus the promotion of these attributes should be incorporated into the promotion strategy. Brochures are only one element of a promotion strategy; other promotional instruments, such as TV advertising campaigns and travel shows could incorporate these information in possible future practise; even though other instruments are not permitted under the restrain of Chinese policies.

The result from this section illustrated that Chinese respondents place the issue of travel expense and ease of obtaining a visitor visa at the priority of determine a possible future trip, it is important

these informative messages could be delivered to respondents to construct reasonable expectations among potential tourists, upon the condition is permitted.

5.8.2 Assessment of Tourism Attractions

The perceived performance of the promotional materials (product grid) shows large difference on attribute distributions than the perceived Canadian performance from PIVC (market grid), as detailed in Figure 5.6 Tourism Attractions Comparisons.

Six attractions are located in the keep-up-the-good-work quadrant in both product and market grids including "museums and art galleries", "wilderness and undisturbed areas", "chances to see wildlife and birds I don't usually see", "mountainous areas", and "small towns and villages." The attractions of "historical, archaeological, or military sites" and "shopping" are located very close to the cross-hair in the market grid, which are questioned about their true performances. In the promotional materials, contents place on these two areas had showed great effort in improving promotions of these two attractions; as a result, the location of two attributes locate further away from the cross-hair in the area of keep-up-the-good-work quadrant in the product grid.

Three of the low priority attributes in the market grid are located in the same quadrant in the product grid; they are "visiting casinos and gambling", "golf", and "whale watching". Because of their low importance and low performance, more promotional effort on these attractions suggested a waste of resources and a lost of opportunity in promoting other attractions with a possible larger return on investment. Description of Canadian tourism also illustrated these attractions as not important; no comments had been made related to the above attractions.

Figure 5.6 Tourism Attraction Comparisons
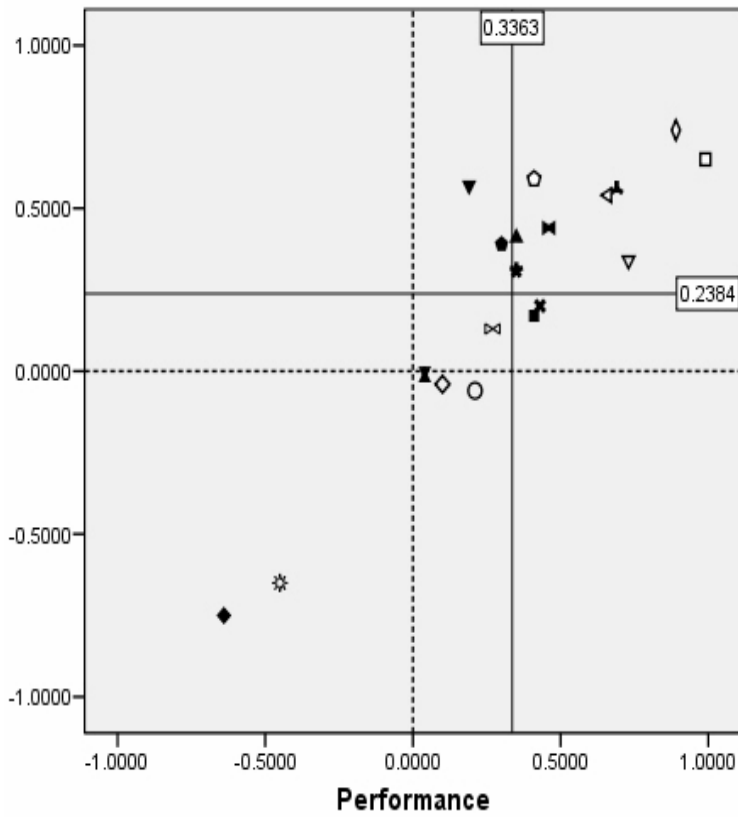
Market Grid   Product Grid
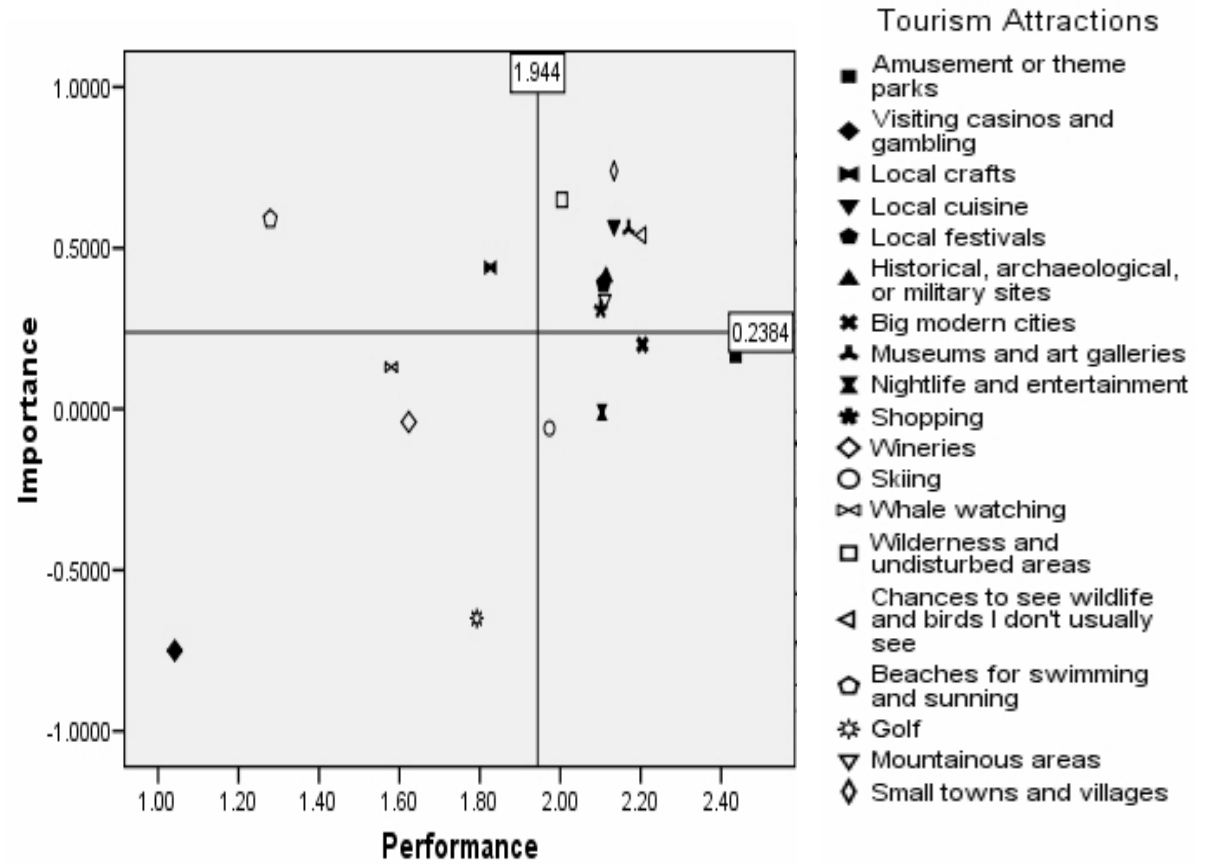
The suggested two attributes for improvements in market grid are "local cuisine" and "local festival"; the perceived performance of promotional materials shows a change of location on these two attractions in the keep-up-the-good-work quadrant in the product grid, which illustrate the improvements had been done on the two attributes. On the other hand, two of the attributes performed well in the market grid are located in the left quadrant of need improvement in the product grid; they are "beaches for swimming and sunning" and "local crafts." It is noticed that there is a great number of comments on the good quality of Canada's natural environment; however, nothing had been indicated related to swimming or beaches in Canada. Even though it is commented that Canada is a multicultural country, no comments were specifically made on the Canadian crafts or related issues. The market grid had shown the higher than average importance evaluation on these two items; however, the promotion did not reflect the importance in the product grid, which suggests future improvement.

There are five attraction attributes suggested to reduce attention in the market grid as "nightlife and entertainment", "wineries", "skiing", "amusement or theme parks", and "big modern cities." Comparison between the market grid to the product grid shows that only "wineries" are located in the lower priority quadrant in the product grid, the rest of them still largely remained in the reduce attention quadrant in the product grid. Canadian nature and nature based tourism attractions are most commented by the Chinese respondents. While many respondents can name large modern cities such as Vancouver and Toronto; it is noticed that promotional materials still focused much on the developed attraction as "nightlife and entertainment" and "amusement or theme parks." Based on the current importance evaluation, contributing largely in promoting these attractions will lead to a possible lost of opportunities in promotion other rather important attributes. It is also notice that skiing are promoted with marginally higher than average promotion. One possibility is that by over promoting these attractions, it is possible to inspire the consumers, thus to create additional market

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interest on these attractions. The basic image of Canada being an ice and snow world, evidenced by respondents' comments, will benefit the creation of the new ski destination image of Canada.

In summary, there are coherences and gaps between the current image of Canada to the position of Canada delivered by promotional materials through the comparison of the results from previous research questions concerning a) the description of Canadian tourism, b) the evaluation of image of Canada at the current stage without mass media promotion, and c) the evaluation of image of Canada promotional through promotional materials.

Most issues are addressed according to its evaluated importance reported by potential Chinese tourists. It is suggested that issues of travel expenses and difficulty of obtaining a visitor visa still will not address properly if these materials are used in future promotions. Many well recognized attractions are promoted well in the materials; two attractions required improvement also obtained promotion attention as well. Developed attractions obtain more promotional effort than nature based attractions, possibly because of the already well-recognized beautiful nature environment of Canada which do not required much further promotion. Two attractions which require improvement are "beaches for swimming and sunning" and "local crafts."

In terms of the general image of Canada, it is noticed that potential Chinese tourists have a very vague image of Canada. It is speculated that the information mainly came from geography text books from secondary education. It is questionable that the positive evaluation on tourism attractions specifically reflects their knowledge of tourism in Canada or simply a reflection derived from the positive national image of Canada.

The findings from all eight research questions are explained in detail in this chapter; based on these findings, the next chapter will discuss issues raising from this study further with a brief summary of all eight research questions at the beginning of the chapter.

Chapter 6 Discussion

This research studied the perceived image of Canada from potential outbound Chinese tourists and to compares this image to the marketing position of Canada by CTC China Division-in effect, to conduct a product-market match between two concepts. The discovery of image obtained by potential Chinese tourists (demand side) adapted both quantitative and qualitative methods intended in seeking for a comprehensive image of Canada as an outbound tourism destination. An anonymous self-administered questionnaire was designed with both importance and performance evaluations and open-ended questions. The questionnaire was distributed in Beijing Capital International Airport in January 2006. Chinese citizens who were traveling internationally, or whose family member is traveling internationally were invited to participate in the questionnaire. Data from the questionnaire were analyzed through important and performance analysis (IPA) and content analysis. IPA result illustrates the evaluation of Canadian tourism attributes by the Chinese consumers; the content analysis expended the limited evaluation result by additional descriptions on the image of Canada provided by respondents.

The marketing position of Canada from the supply side is constructed through an IPA based on the importance of attributed obtained from the demand side, compared to the performance of these attributes obtained from content analysis of the tourism promotional materials circulated through CTC China Division upon December 2005. Discussions on the coherences and/or gaps between the demand and supply are presented later in this chapter to inspire possible marketing implications, after a brief summary of the findings from each research questions.

6.1 Summaries and discussions of the findings

This section provides a brief summary and discussions of the findings on eight research questions. Comparisons of the findings from this study are made to previous studies on Canada (CTC, 2001a;

2006), the United States (Cai et al. 2000; Jang et al. 2003), New Zealand (Pan & Laws, 2001; Ryan & Mo, 2001), and the study on outbound Chinese tourists (Kim, Guo, & Agrusa, 2005).

6.1.1 The level of interest of Chinese consumers in visiting Canada for vacation

More than half of the respondents of the questionnaire showed their interest in visiting Canada for a vacation. Those respondents who were in favor of Canada indicated a list of attractions led by natural scenery. The most favorite tourism cities or regions are Vancouver, Toronto, and Ottawa, while respondents favored Niagara Falls among specific tourism sights. Visiting friends and relatives is the most popular activity respondents would be interested in Canada. Ontario, by far, features most of the tourism attributes recognized by Chinese consumer; while Atlantic Canada provinces and Saskatchewan did not obtain any comments. It is recognized that many respondents have little to none tourism knowledge on specific sights or products though they reported high willingness to travel to Canada, which is agreed with the findings from travel trade interviews by CTC (2001a; 2006). Though the absolute volume of Canadian knowledge is low, it is not clear whether tourism knowledge on competitive destinations obtained by Chinese consumers is higher than the knowledge of Canada. Finding from the study on Chinese tourists to Australia also illustrated a lack of tourism image of Australia (Pan & Laws, 2001).

A little less than half of the respondents who are not interested in visiting Canada reported the major concerns for travel expenses, lack of free time, lack of knowledge on Canada, and concerns for the distance travel. Weaknesses and travel barriers reported by CTC (2001a) reflected the same issues, however in different sequence based on the interviews of travel trade in China. Currently, the tourism knowledge of Canada obtained by Chinese consumers is still limited, which effect the decision making related to future tours to Canada. This study suggests that language barrier, reported by a number of studies (CTC, 2001; Pan & Laws, 2001; Ryon & Mo, 2002), is not a significant

barrier.

6.1.2 Demographics

The demographics showed sample is evenly distributed among gender (male to female) and marital status (married to single), contradictory to the findings of a male dominated mostly married sample of Chinese travelers to the United States (Jang et al, 2003). The majority respondents who are interested in visiting Canada are from age 19 to 44 (85%) which is aligned with the suggested long-haul travelers by CTC (2001); however, this sample is much younger than the result presented by Jang et al (2003) on travelers to U.S.A. Over 85% of the respondents have postsecondary education which is also higher than the previous study's findings (CTC, 2001; Jang et al. 2003). Incomes level varies among all categories ranging from less than 1,500 RMB to 12,000 RMB or above; the income of respondents are comparatively lower to the previous studies (Cai et al. 1999; CTC, 2001a; CTC, 2006; Jang et al. 2003), even though there is a higher percentage of respondents (12.5%) obtaining income equal or above 120,000 RMB.

In terms of differences between group of people interested and group of not interested, it is noticed that respondents aged 35 or over, especially 35 to 39, are more interested in Canada than younger cohorts. Females are less interested in Canada than their male counterparts. The comparison result is beyond the previous studies.

6.1.3 Trip characteristics

Participants of this study were questioned on their past experience, future travel plan, arrival destination and trip purpose in order to understand their trip characteristics which agreed with the findings from Jang et al (2003). The result showed that close to half of the respondents had traveled internationally and participants who had past experiences of international traveling are more likely to travel to Canada (Cai et al. 2000; CTC 2001a, 2006; Ryan & Mo, 2001).

There was 51.3% of the respondents who were traveling internationally were interested in visiting Canada in the future. These respondents were traveling to European countries (35.9%), Asian destinations (32.5%), and North America (18.2%). Close to 70% of the respondents' arrival destinations were approved by the Chinese government; only U.S.A. and Canada were the unapproved destinations among the top ten arrival destinations reported in this study. Instead of a very concentrated traveling to Asia (CNTA, 2007; CTC, 2001), respondents of this study traveled more spread to other continents.

Leisure is the leading travel purpose followed by business, education, VFR, and immigration. Comparison between arrival destination and trip purpose showed that North America is still not a popular continent for leisure, but more for education and other purpose such as immigration and visiting friends and relatives. This finding is contradictory to the CTC's finding of 45% of VFR, 25% for business, and 15% for leisure. On possible explanation is that visitors coming to Canada for leisure may report their travel purpose as VFR or business because they applied temporary residence visa for VFR and business reasons, even though their main purpose of traveling is different. This result is also contradictory to the result studies on visitors to the United States (Jang et al. 2003) which illustrated the focus of business traveling.

6.1.4 Descriptions of Tourism in Canada

To discover the image of tourism in Canada, participants were invited to comment on the subject with three adjectives or phrases; the responses showed a very vague image of tourism in Canada originated from the national image of Canada. The most comments are "geographically large", "sparsely populated", "rich in natural resources", and "good natural environment." Respondents described Canada as a beautiful, clean, tranquil, peaceful and secure country. Weather was evaluated overall good; tourism was evaluated overall competitive even though there was some criticism on the

subjects.

The finding from this study is in aligned with the CTC's finding on Canada "as a safe, clean, and welcoming destination" (P2, 2006); as well as the fact that "knowledge of specific attraction, signature travel experiences, and regional characteristics if poor." This finding also appeared in CTC's consumer study in 2001. Even after five years, the findings of both studies are strikingly similar to the large extent, which shows a slow progress in promoting Canada possibly due to the lack of ADS. However, in this study, comments on specific tourism attractions in Canada started to appear in this result related to Niagara Falls, Vancouver, Victoria, and Great Lakes. It appeared that Chinese consumers are gaining knowledge of Canada, especially of tourism in Canada.

6.1.5 Evaluation of Current Image of Canada

This section examined the respondents' perception toward two groups of image attributes (travel issues and tourism attractions) in terms of attribute importance in general and performance of Canada. Travel issues referred to the attribute that Chinese consumers general concerns when choosing a vacation; tourism attractions refers to the sights or activities in Canada that are attractive to Chinese consumers. The result showed that Canada has a fairly positive evaluation among all the attributes; performances of travel issues are more closely associated with importance than the performances of tourism attractions to importance.

Among the travel issues, the result showed a good evaluation on personal safety in Canada, Canadian scenery, hygiene and cleanliness in Canada, and "quality air, water, and soil in Canada", largely agreed with the CTC's study in 2001 and 2006. Improvements are needed in the travel expenses to and in Canada and the issue of obtaining a visitor visa. Suggested by Kim et al. (2005), Chinese tourists in general evaluated easiness to arrange travel plans and inexpensive travel cost not at great importance; however this study showed a priority rankings of these attributes which illustrate

their importance specifically in traveling to Canada. Canadian weather did not perform well either, which requires improvements.

Though CTC (2001a) recommended promoting the fact of large number of Chinese living in Canada to represent a non-discriminative social environment in Canada, the result of this study showed the low importance of "presence of Chinese in the country" and "mandarin speaking environment in Canada". Thus it is suggested that these attributes should maintain the same level of low promotion. The issue of non-stop flight was considered not important but performed very well, thus should not be an focus in the future promotion strategy.

Among the tourism attractions, skiing, visiting wineries, nightlife and entertainments are not as important, thus should not be promotional focus in the future strategy. On the other hand, Canadian cuisine and Canadian festivals performed not as well that require further promotion. The finding from Cai et al. (2000) and Jang et al. (2003) illustrated very different preference of Chinese tourist to U.S.A. illustrating favorite attractions of shops, restaurants, historic sites, casinos, and theme parks; interestingly, only historic sites were evaluated as important and assessed as something Canada did well in providing, in this study, the rest attractions are all at low importance, especially casinos and gambling being the last of the importance ranking. Chinese consumers generally indicated that Canadian developed attractions are not performing as well as nature based attractions; similarly, CTC (2001) had found that Chinese consumers had a better evaluation on nature tourism in Canada than the cultural tourism in Canada.

6.1.6 Preferred Trip Attributes

The respondents who are interested in visiting Canada had sketched a preferred trip to Canada as a slow paced group tour of two weeks in the fall on a motor coach, featuring bed-and-breakfast or other middle price ranged accommodation, nature based sights at majority of visit, and priced around

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10,000 RMB with food from a variety of culture. CTC (2001a) had indicated a different picture as package tours lasting less than seven days with three-star or medium-priced hotels.

The increasing tendency of "self-service" or a "fully independent tour" is supported by the findings from Kim et al (2005) compared to the previous statistics of 80 to 90 percent outbound leisure trips booked through travel agencies (CTC, 2001a). The travel length preference of this study is consistent with findings from Kim et al (2005) and CTC (2006) at a length of stay of 6-10 nights.

Previous studies (Cai et al, 2000; CTC, 2005, WTTC, 2003) illustrated Chinese as the highest spenders per capital in the world at average U.S. $2,090 per trip. In contradictory, the result from this study is more close to the finding by CTC (2001a) at 3,500 to 9,000RMB per trip ($636-1,636 Canadian Dollar).

The most favorite information sources illustrated by this study are word-of-mouth through relatives and friends, followed by travel agencies, travel guide books, and official tourism websites. Similarly, Ryon and Mo (2001) had indicated travel agencies and trip organizers as the leading information source. In addition, Jang et al (2003) had suggested airline companies as the third most visited information source.

6.1.7 The Evaluation of Performance on the Promotional Materials

The performance of the promotional materials by CTC were discovered through an importance and performance analysis carried out between the importance of image attributes to, the other hand, the performance of image attributes from promotional materials. The result showed a need of improvement on expenses traveling both to and in Canada", on the process of obtaining visitor visa, and on the promotion of beach related attractions, local crafts, and the chances to see wildlife and birds on has never seen. It is also recommended that promotions on the developed attractions, "nightlife and entertainment", "big modern city", and "amusement or theme parks" should be

considered carefully in order to reduce promotional attention in future promotion. This is the first such analysis done on the Canadian tourism promotional materials. The result illustrated the focused promotion on developed attractions with less emphasis on nature based attractions from CTC in co-operation of its partners.

6.1.8 Product-Market Match

Three components, the descriptions of tourism in Canada, current image of Canada, and marketing position of Canada through promotional materials, had merged in this section to reflect the coherences and/or gaps between the perceived image of Canada and position of Canada. The result indicates improvements still required in issues of travel expense and obtaining visitor visa. Developed attractions obtained more promotional effort which will increase the awareness of Canadian developed attractions since the Canadian nature based attractions are already well-recognized by Chinese tourists.   In general, Chinese consumers have a very vague but positive image of tourism in Canada. Based on the above findings from the eight research questions, the next section discusses marketing implications, future research and limitations.

6.2 Discussion and Implication

This study showed a product-market match between the images of Canada obtained by Chinese consumers who are interested in visiting Canada, to the other hand, the marketing position of Canada reflected through the promotional materials. The information derived from this study is potentially useful for promoting Canada to Chinese tourists and providing tourism products according to Chinese tourists' demand. The following section illustrates the coherences and gaps between the product and market with possible marketing implications.

6.2.1 Coherences from Product-Market Match

The importance and performance grids, along with the general description of tourism in Canada, have clearly showed much coherence among the image perceived and marketing position. Recall from Section 5.5, the first set of IPA was performed on the perceived image of Canada by potential Chinese tourists. The second set of IPA was performed on the importance of image attributes to the performance of promotional materials on these attributes, as illustrated in Section 5.7. The performance of the tourism attraction in the promotional materials is closely associated with the importance of these attractions; even though the level of association is lower between the performances of the travel issue reflected in the promotional materials to the importance of these issues, the locations still remain in the similar quadrant with little movements. The finding of this study shows a vague but very positive image of tourism in Canada derived from the national image of Canada. The current promotional materials features strategies building on the current image of Canada as well as targeting to the attributes requires improvements, for example culture attractions. To promote Canadian culture and cultural related attractions will lead to the better awareness of Canada and increase interest in visiting Canada for future vacations. However, there are gaps between the image perceived and marketing position of Canada with its marketing implications, which are illustrated further in the next few sections.

As Kotler et al. (2003) and Johnson-Tew (2000) illustrated, the objectives of marketing communication are to inform, persuade, and/or remind consumers about a tourism product or a destination. Marketing communications can inform tourists on the existence of the product or destination, as well as educate consumers on the features by providing informative promotion. The objective to persuade consumers plays are especially important to increase competitiveness in the market. Finally tourism promoters can also remind consumers about the knowledge and experience of the tourism product or a destination.

In this case, the result of this study clearly reflected a vogue image of tourism in Canada; the most logical promotion strategies based on the result of this study should object to inform potential Chinese tourists and educate them on the tourism attributes in Canada by providing informative promotion. However, persuasive promotions on the attractiveness of Canada should also play a part of the promotion targeting to experienced market segment, for example business and conference travelers. The next few sections discussed the gaps observed from the perceived image of Canada to the marketing position of Canada and types of promotion most suitable to fill the gap as marketing implications.

6.2.2 Culture Diversity

The attributes of presence of Chinese in Canada and Mandarin-speaking environment in Canada are evaluated as low importance by the potential Chinese tourists. In addition, comments from the image of Canada described by the Chinese respondents showed some negativity in these issues, which again confirmed its low importance. The friendly and non-discriminative travel environment, as well as fluent language environment, is considered important to international tourists in general; rather, this study illustrates the demand culture diversity from potential Chinese tourists. In 2001, CTC has stated the typical Chinese travelers to be "attracted to western culture and wants to see a different lifestyle." (p18); similar finding are also illustrated by Spiers (2005).

Through the history, cultures in Asian countries have mingled and reformed despite the differences of language and customs. Chinese tourists have close access to Asian destinations such as Singapore, Malaysia, and South Korea, for tours with close related cultures. The implementation of ADS on these countries had also provided more economical means of traveling for Chinese tourists who wanted to travel to a similar culture. On the other hand, the market has demonstrated a great increase of Chinese traveler to European countries, Australia, and New Zealand despite the discomfort of

Chinese tourists being in a different language environment and the higher expenses of traveling; this is because of the demand for culture diversity.

The culture diversity, in this case, can be interpreted from two perspectives: 1) the diverse culture from Chinese culture, and 2) the diverse culture among itself. The tours to European countries (usually visiting five to eleven different countries depending on the tour length) provides a different culture at each country or location, which attracts many Chinese consumers. Such trips are not only full of leisure, but also knowledge of different culture. Canada, described as a geographically large country, features both levels of opportunities attracting Chinese tourists who are in seeking of culture. Canadian culture, largely originated from Caucasian cultures, is significantly different from Chinese culture; in addition, the multicultural communities should also be attractive to Chinese tourists.

However, Canadian culture is still not fully expressed through the promotional materials. It is noticed that the descriptive sentences on the culture diversity do not appear very often; however, images presented in the promotional materials have some indication of culture diversity. It is the researcher's understanding that just like a Caucasian may not easily differentiate a Chinese person from a Japanese person, it is also difficult for a Chinese to differentiate among two Caucasians. It is even harder to differentiate cultures through cuisine or architectures from images. For a better promotion of multiculturalism in Canada and its tourism attractiveness to Chinese tourists, it is recommended to imply descriptive sentences that clearly illustrate the difference of culture, instead of representation through images.

Furthermore, the appearance of attributes, the presence of Chinese in the country and possible Mandarin speaking environment, are not at the advantage of Canadian tourism promotion. It is true that the appearances of a happy Chinese can represent a non-discriminative environment toward Chinese tourists and a Mandarin speaking environment would feature some level of comfort.

However, the general description of Canada already showed a very positive friendly image of tourism environment in Canada. The fact that many Chinese has immigrated to the country is well recognized as well. Therefore, it is unnecessary to build up another image of a friendly environment to Chinese when a very positive one already exists; the resources could be allocated to other areas which may yield a better return on investments. As well, the performance of these attractions calls for reduced attention because of its potential disadvantage on the formation of the diversified culture image of Canada.

6.2.3 Unconventional tourism attractions

The unconventional tourism attractions featured in this study include wineries, whale watching, and golf; these attractions are all evaluated at low importance to potential Chinese tourists and low performance. Skiing may not be a reduce-attention attribute, even though evaluated at low importance and above average performance. This is because of its high variance and close location to the cross-hair. It is suggested either maintaining the low level of promotion or reducing attention on these attractions from future promotion according to the importance and performance analysis.

All the above four attributes are not commonly recognized in China because of a number of reasons. China traditionally does not make wine from grapes; the traditional Chinese alcohol factories features the image with topless male labors sweating in steam, rather than the western image of a peaceful country farm with endless grape fields under the blue sky. Potential Chinese tourists are not traditionally wine drinkers either; to understand the formation of such a magical juice would not appeal as important. Therefore, it is obvious that Chinese tourists have less of an interest in wineries. Whale watching is not popular to Chinese tourists because of the same low knowledge factor. Comparatively, golf and skiing are more recognized recently; however, they are still at the early stage of development with low market familiarity.

It is not questioned that the increasing awareness of these activities would lead to profit, at least in Mainland China evidenced by the great expansion of Yabuli international ski resort located close to Harbin, China. However, it is questioned that promotions on the four unconventional attractions would obtain a positive return on investment and whether the promotion will yield a bigger retune on investment than promoting other attractions at the opportunity. Of course this concern reflects a pure marketer's point of view solely in view of return on investment. From an integrated destination management perspective, promoting these attributes as signatures of Canada in the construction of an authentic image of Canada is also valid (Gretzel, Fesenmaier, Formica, & O'Leary, 2006). If in the case of a scarce of promotional resources, it is logical that attributes evaluated with more importance should obtain more resources. However, the answer of weather to promote these unconventional attributes also depends on the location and promotional focus of the campaign.

Attractions in the Rockies, for example Banff and Jasper national park, would benefit much more from promoting skiing and golfing as its attractions along with incredible natural scenery. On the other hand, city of Quebec may utilize the promotion opportunity in other areas such as its unique Quebecoise culture. The issue becomes more complicated when the promotion rise up to the provincial level and the national level. The frequent solution for this complication is to focus one campaign to one theme, such as nature wonder, or to divide one campaign into a few themes which in turn formulate a multidimensional image of tourism in Canada. Despite the solutions taken by either destination marketing organizations or higher level promotion agencies, the result of this study shows the low knowledge of unconventional activities, including golf, wineries, skiing, and whale watching, which yields great opportunity for future market development in soft and hard adventure tourism in Canada. To be or not to be is always the classic question, and it is the promoter to decide whether to promote these attractions. Obviously informative promotion is more suitable in marketing these unconventional attributes. The decision of when to promote is upon the promoter as well: a) whether

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is it to promote these attractions now? or b)Whether is to wait for the increased familiarity of these tourism attractions among potential Chinese tourists caused by the increase of promotion by Chinese tourism companies inside Mainland China and then promoting Canada accordingly.

6.2.4 Travel expense to Canada and issue of obtaining a visitor visa

The issue of traveling to Canada and the issue of obtaining a visitor visa to Canada are both evaluated as very important. As mentioned in research question seven, CTC and its partners, have little influence on the performance of these issues without the ADS from the negotiation between Chinese and Canadian government. Without ADS, the tourist visa application process will not exist; rather the current temporary residence visa application process will remain with visa for business, visiting friends and relatives, tourism, and other purpose. The traveling expense, on the other hand, will not produce economics of scale (the more visitors, the cheaper the price) without the massive number of Chinese tourists visiting Canada due to the lack of ADS. However, even without the ADS, it is recognized that Chinese are visiting Canada just under the current situation; therefore, the issue becomes how to encourage the potential Chinese tourists in situations with and without ADS.

The current application process (for a temporary residence visa for business, visiting friends and relatives, tourism, and other purposes) regularly takes a few months as recommended by Canadian Embassy in Beijing. It has been largely handled by the outbound tour agencies in China not only for the reason of complex process, but also for a higher return of designated visa. Individual tourists who have a willingness to tour Canada, have to find a qualified tour agency and provide a large security deposit (various by regions from 150,000-600,000RMB, equivalent to $23,000-91,000 Canadian Dollar) of asset (including cash, bonds, cars, real estate, and so on).

If ADS is granted, the application process will take less time and the qualifications will not be as high since the visitor visa, as the solution of the ADS agreement, will allow Chinese tourists to visit

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only certain areas of Canada. This will largely encourage the Chinese group tours to consider Canada for vacation. As well, the ADS will bring a larger number of Chinese tourists to Canada which can produce the economics of scale, which in turned will be beneficial to both Chinese tourists in visiting Canada and to Canadian tourism industry for the larger gross income.

If ADS is granted, the official promotion campaign of Canada could proceed in the mainland China. It is recommended that the process of obtaining a visitor visa and the general expense of traveling to be introduced through the campaign for an accurate understanding of a trip to Canada. The informative components of the campaign will clearly separate the small elite market segment which should be targeted by CTC and its partners; in addition, the accurate understanding of a trip to Canada will lead to a higher satisfaction rate. Informative promotion on the fact of designation of ADS, reasonable cost of a trip to Canada, and the tourist visa process would assist to construct a reasonable expectation on the logistics of traveling to Canada, as well as a comparatively smoother preparation for the vacation. Therefore, the travel experience of Canada would be less affected by the pre-vacation trouble experience in logistics, which in turns increase the tourist satisfaction.

The negotiation of ADS progress not as quickly as expected and the result of this negotiation is uncertain; at the current condition, to encourage more Chinese tourists to Canada without ADS, the only solution of dealing with visa issue is to allocate more human resources to Canadian immigration offices in China for a faster return on applications. The newly implemented policies in Canadian Embassy in Beijing have reflected the improvement in this issue. The expense issue would remain the same; however, informative promotions should be considered to introducing the regular visa application process with improvement and the general expenses to potential Chinese tourists for a better understanding and a real expectation of a tour to Canada instead of the current low performance on the issue. Similar to the argument on promotions with ADS, the result of a better understanding and an accurate expectation of a trip to Canada should be leading to a better image of tourism in

Canada in the targeted market segment.

6.2.5 Possible market segments before ADS and after ADS

Through the summary of results, there is a large contradictory evidence from this study compared to other studies on the Chinese tourists to U.S.A with respect to demographics and travel purposes (Cai et al. 2000; Jang et al. 2003). It is also noticed that this study's result are more agreeable with the result from studies on New Zealand (Pan & Laws, 2001; Ryan & Mo, 2002). One may wonder the reason of a great difference between Canada and U.S.A all without ADS currently, despite their close location and similar image of modern-developed country indicated by potential Chinese tourists. The reason behind is the different market segment had been studied in this study and in the studies from U.S.A. Jang et al (2003) specifically analyzed the differences of tourism behavior between Chinese business tourists and Chinese VFR tourists to U.S.A. Because of the visa regulations applied, business tourists are often travel with a significant component of leisure activities (CTC, 2001a), and tourists could obtain visa for visiting friends and relatives purpose in order to secure the designation of that visa. Therefore, there are not many differences between the two groups except that there is the business component involved in the business traveling and business travelers are staying in commercial accommodations.

Through further comparison, demographics and trip characters from the studies on Chinese tourists to U.S.A. had mainly reflected a business dominated market; tourists were generally male traveling in groups of three or four, stayed around 19 nights, with a significant demand for shopping, sightseeing in cities, dining in restaurants, and visiting historical place (Jang, et. al, 2003). The group size of the business travelers is significantly larger than the group size of VFR travelers (around two people). Even though there is not a significant differences on annual household income of the business travelers and the VFR travelers, the average travel expenditure of the business traveler is 1.57 times

of the VFR travelers despite fact that the average length of the business travel is only a quarter of the VFR travelers. The cost of accommodation contributes to the high expenditure; the total expenditure of the business traveling is at the cost of the business including companies, organizations, and different levels of governments.

Even though some reports stated that Chinese tourists are among the highest spenders in the world (Cai et al, 1999; CTC, 005; WTTC, 2003), it is questioned which market segment of the "Chinese tourists" are referring.   The respondents of this study are Chinese citizens in the international lounge outside of the departure gate, who was either traveling to international destinations, or who was not traveling but with a family member who was traveling internationally. It is assumed that Chinese tourists who were traveling internationally or who have family members traveling internationally would have the affordability to an international trip. The result of this study illustrated the low purchasing power of the potential Chinese tourists.

It is observed at the airport that many group travelers refused the participation in this study because of their tight schedule at the airport. Even though many did participate in this study, the majority of the participants were traveling in parties smaller than three travelers. Therefore, the result of this study largely reflected the opinions of those tourists who did not travel in groups compared to the research done by Jeng et al (2003).

After this differentiation, the contradictory evidence from this research compared to previous studies can be explained easily: the tour groups traveling for business purposes with components of traveling at the business' expense have dramatic differences of individual travelers for tourism or VFR purposes. The result of this study would reflect the individual travelers' opinion at a higher degree than the group travelers. There is no clear differentiation in this matter among Chinese tourists came to Canada; thus no clear statistics can be illustrated. However, it is clear that the

designation of ADS would expand the current Chinese tourism market to Canada. At that time, the important issue would be to differentiate markets of group tourists at business' expense to market of individual tourists.

6.2.6 Features of a preferred trip to Canada

The currently, most groups from China to Canada favors an specifically designed trip itinerary for each group, which is because that most of these groups still requires an element of business visit due to the nature of the trip as "business trips". If the ADS are granted to Canada, with the opening of the potential Chinese tourists market, each inbound tourism company in Canada would provide a number of formulized tour itineraries that would be directly promoted to Chinese tourists in Mainland China. The result of this study provides the features of a preferred trip to Canada. Even without ADS, this result can help Canadian tourism industry understand the potential Chinese tourists and their expectations.

According to this study's result, an desirable trip by the potential Chinese tourists should be: slow-paced; group tour; two weeks in length; in fall season; featuring middle-budget accommodation, preferably bed-and-breakfasts; on motor coach; mostly visiting nature based sights; and providing food of various cultures. The potential Chinese tourists' responds showed their preference of not planning or organizing a trip to Canada, probably because of the low knowledge, the complexity nature of the planning, and the language barrier. As mentioned in Section 5.6.5, middle-budget accommodations, especially bed-and-breakfasts, are mostly preferable; however, bed-and-breakfast may not be a feasible accommodation mean because of its relatively small size and the issue of possible illegal immigration.

The preferences illustrated above are for general guidance; specific considerations should be placed on each and every development of tour itineraries. It is not suggested to simply adopt all above

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suggestions in one tour because there may be a number of complications. For example, a trip with swimming and sunning on the beach clearly will not be incorporated with the maple leaf tours in the late fall limited by the weather condition.

The preferred budget for such trip is at 10,000RMB which does not even cover the average airfare. Thus, besides providing tour products according to demand; further informative promotion on the expenses of traveling to Canada are in need to construct a reasonable consumer expectation.

6.3 Future research and limitations

As discussed in the previous section, there is a considerable Chinese market recognized by CTC (2001a; 2005; 2006) and it is expanding rapidly. Future promotion should be based on the current image Canada and target to these potential tourists for the maximum of return on investment. This study shows some insight of this market in terms of the current perceived image of Canada and trip preference of these potential tourists; however there is also a great variation among this group. There is an elite market segment of Chinese tourists who have the ability to travel internationally and who are interested in traveling to developed countries with little concerns on the exchange rate and buying power. Based on the studies (Cai et al. 2000; Jang et al. 2003), this elite group travel for business or government purposes and have their costs covered through expense accounts.   The size of this market segment and purchasing powers of this segment requires future research. However, there is also the market segment of populace Chinese who do not have such a high purchasing power and travel for leisure or VFR purposes. The later market segment would expand greatly if ADS is granted to Canada, which calls for further research on travel preferences and other characteristics of this group.

The potential tourists' perception of a destination before vacation is rarely studied under the importance and performance analysis because of the traditional importance and performance analysis (IPA) is for the evaluation of service qualities after the service has been delivered. However, this

technique has been recognized for its utility in understanding the consumers' decision-making process (Oh, 2001). The travel market for Canada in Mainland China had introduced the great opportunity to utilize this technique. Through this study, Oh's suggestion on the cross-hair placement has been adopted in the first two important performance analysis. In these two analyses, absolute performance of the image attributes were firstly interpreted by the scale means as the cross-hair, followed by further interpretation of relative performance among image attributes by actual means as the cross-hair. The result of the two steps interpretation is different from the result of a one step interpretation of actual means.

Figure 6.1 IPA Grid – Travel Issues and Tourism Attractions

IPA Grid - Travel Issues

Travel Issues
- ■ Quality air, water, and soil in Canada
- ◆ Presence of Chinese in Canada
- ● Non-stop flight to Canada
- ━ Hygiene and cleanliness in Canada
- ▲ Expenses travel in Canada
- + Expenses travel to Canada
- ✳ Mandarin speaking environment in Canada
- ► Personal Safety in Canada
- ⵜ Canadian scenary
- ⬟ Obtaining a visa from Canada
- ✶ Canadian weather

IPA Grid - Tourism Attractions

Tourism Attractions
- ■ Amusement or theme parks
- ◆ Visiting casinos and gambling
- ⋈ Local crafts
- ▼ Local cuisine
- ⬟ Local festivals
- ▲ Historical, archaeological, or military sites
- ✖ Big modern cities
- ♣ Museums and art galleries
- ⵜ Nightlife and entertainment
- ✳ Shopping
- ◇ Wineries
- ○ Skiing
- ⋈ Whale watching
- □ Wilderness and undisturbed areas
- ◁ Chances to see wildlife and birds I don't usually see
- ○ Beaches for swimming and sunning
- ✳ Golf
- ▽ Mountainous areas
- ◊ Small towns and villages

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In travel issues (Figure 6.1 IPA Grid - Travel Issues and Tourism Attractions), if the cross-hair has been placed directly to actual means, the issues of presence of Chinese in Canada would be concluded as low priority issue. The implication is that no actions should be considered to deal with this issue, just remain the current situation would be fine. However, the importance of the issue is below neutral and the performance is slightly over neutral; this implicate that the current promotional strategy on this issue should be decreased according to its importance, which contradicts the result if the actual means are the only cross-hair. This situation applies to three other attractions, nightlife and entertainment, wineries, and skiing, from the tourism attractions IPA grid (Figure 6.1).

Similarly, two attractions, local cuisine and local festivals, were evaluated as important and attractive, which a manager should consider to keep up the good work on these attributes. However, it is clear that these two attributes are performing relatively worse than the rest of the attraction. If the marketing strategy was planed to emphasizing other attractions, the performance of these attractions is at manager's satisfaction. However, if the marketing strategy was to promote all the attractions, only the two stepped interpretation would be at advantage of clearly identifying the attribute.

The two stepped interpretation formulates a more comprehensive marketing action indication not limited to the absolute performance, but also the relative performance of an attributes among a group of selected attributes. The marketing action derived from such interpretation is based on the performances with the consideration of relative scarce promotional resources, which will provide more alternatives for managers under the pressure of limited resources.

This two stepped interpretation can be utilized in other studies with important and performance analysis; this study has indicated its strength. Even though the suggestion of a two stepped interpretation was made by Oh (2001), little research has been done on the illustration of the strength

of this method. It is noticed that movement of actual mean cross-hair from the scale mean cross-hair in this study is toward the keep-up-the-good-work quadrant. Future research utilized two stepped interpretation in different cases may have movement toward the rest three quadrant, which could further examine the strength and weakness of this method.

Because importance and performance analysis is adapted in this research, limitations on the technique also apply to this research in terms of attribute selection and correlations between the importance and performance. Despite the careful attribute selection process and the comments provided by respondents, there are still travel issues perceived as critical issues perceived by potential Chinese tourists not included in this study, same as tourism attractions. Limited by the research resources, the attribute selection is a limitation of this study. The issue of high correlation between importance and performance has been recognized and discussed greatly through literature (Oh, 2001), even though the correlations featured in this study are all around the same level as previous studies, it is still a limitation because of the possible biased response from the potential Chinese tourists.

The survey period is in January 2005, when most Chinese students studying abroad returned back to school. The result reflected this issue with a higher percentage of respondents from age 19 to 24, which could not be generalized to the other time of the year. Therefore, marketing strategy based on this result should carefully consider this limitation.

Finally, Chinese participants are more likely to provide positive comments on subjects; which is a cultural limitation of this study. Expressing positively and avoiding negativity is a general rule to avoid conflict and possible harm, which had always been in the Chinese culture, better described as "Zhong Yong." As the origin of Zhong Yong, Confucianism with a history back to 3rd or 4rh century BCE is already an inseparable part of the Chinese culture evidenced in daily life. Chinese culture, compared to the American or European culture, has always been implicit. Therefore, it is

understandable that respondents may over evaluate attributes (thus, a more positive response performance) or over compliment Canada (thus, a higher percentage of positive comments from the description of Canada). The researcher had adopted two stepped interpretation method (interpretation based on the scale mean first, and interpretation on the actual mean) to adjust the findings from respondents' biases. Even though with the two stepped method implemented, this is still a possible limitation which could not be able to avoid because of the market of research is potential Chinese tourists.

6.4 Conclusion

This research examined the perceived images of Canada of potential Chinese tourists, and to compare to the marketing position of Canada by CTC China Division-in effect, to conduct a product-market match between two concepts. The research is designed to discover the perceived image of Canada obtained by potential Chinese tourists through both qualitative (descriptions of Canada) and quantitative (importance and performance analysis) studies. A questionnaire is designed for this purpose featured questions on comments of tourism in Canada, importance of selected attributes in travel decision making, performance of selected attributes on Canada; the trip preferences, and the demographic and trip characteristics of the respondents. On the other hand, the marketing position of Canada by CTC and its partners are examined through content analysis of the promotional materials circulated from CTC China Division.

The data analysis was first performed on the demographic and trip characteristics of the respondents to detect any significant differences between potential Chinese tourists to Canada and the Chinese respondents who are not interested in Canada. The result showed that male respondents with previous outbound travel experiences are more interested in visiting Canada.

The general image of Canada is later detected through content analysis of comments on tourism in

Canada provided by those potential Chinese tourists, which illustrate the fact that Canada has a vogue but quite positive image on tourism, which was derived from the general image of Canada. Beside Niagara Falls, Toronto and Vancouver, other tourism attractions or specific tourism sights are not commonly recognized. There has been no indication of any comments on Saskatchewan or Atlantic provinces.

The current perceived image of Canada analyzed through an important and performance analysis shows a general good performance is on all the travel issues and tourism attractions related to Canada. However, issues of presence of Chinese in Canada and Mandarin speaking environment should be considered with less promotional effort in the future. Instead promotion resources should be leading toward issues of Canadian weather, travel expenses, and visa application process. Canadian weather is perceived generally well, with a number of unattractiveness incidents concerning the coldness of Canada illustrated by mountain caps with glacier and snow. The promotion on Canadian weather may avoid items that illustrate the coldness of Canada unless it is necessary for the promotion of attractions. The promotion on travel expenses is objected to establish a reasonable expectation on a trip to Canada obtained by Chinese consumers. As the rule of thumb, tourists with reasonable expectations are more than likely to be satisfied in traveling because expectation is also a factor of the overall satisfaction. The promotion on visa application process is to reinforce the true procedure. More knowledge on this issue will not only establish reasonable expectation on obtaining a visitor visa, but also empower potential tourists in planning trips to Canada, which may lead to an increase of trips. It is also noticed that nature-based tourism attractions are perceived more attractive than the developed tourism attractions.

The preferred trips by potential Chinese tourists are discovered by descriptive information indicated by respondents which shows that potential Chinese tourists prefer a trip: slow-paced; group tour; two weeks in length; in fall season; featuring mid-budget accommodation, preferably bed-and-

breakfasts; on motor coach; visiting nature based sights at majority; and providing food of various culture. The typical budget for such trip is target at 10,000RMB, which does not even cover the average airfare.

The performance of the marketing materials is analyzed through another IPA; the result shows that most attraction promotions are targeting to weaker attractions based on the current image of Canada. However, travel expenses issues and the issue of obtaining visitor visa are still not addressed through the materials. As discussed in detail in Section 5.7, the promotional materials may not feature much of the information on these issues; however, other components of the promotion strategy can feature informative components on these issues to establish a reasonable expectation of a trip to Canada obtained by potential Chinese tourists.

The coherence and gaps between the current perceived image of Canada obtained by potential Chinese tourists, to the other hand the marketing position of Canada is done by the comparison between the evaluation on current image of Canada and the performance of the materials with contributions from descriptions of Canada.

Based on the results of this study, marketing resources should be allocate to attractions including possible unconventional tourism attraction rather than the presence of Chinese in Canada and mandarin speaking environment in Canada, this is because potential Chinese consumers are in seeking of the culture diversity. Informative promotion should also be carried out around issues of travel expense and obtaining visa. This research shows insight of the potential Chinese tourist market; however, the great variation among the Chinese market calls for further research.

Appendix A
IPA Grid with Standard Error

IPA Grid - Travel Issues
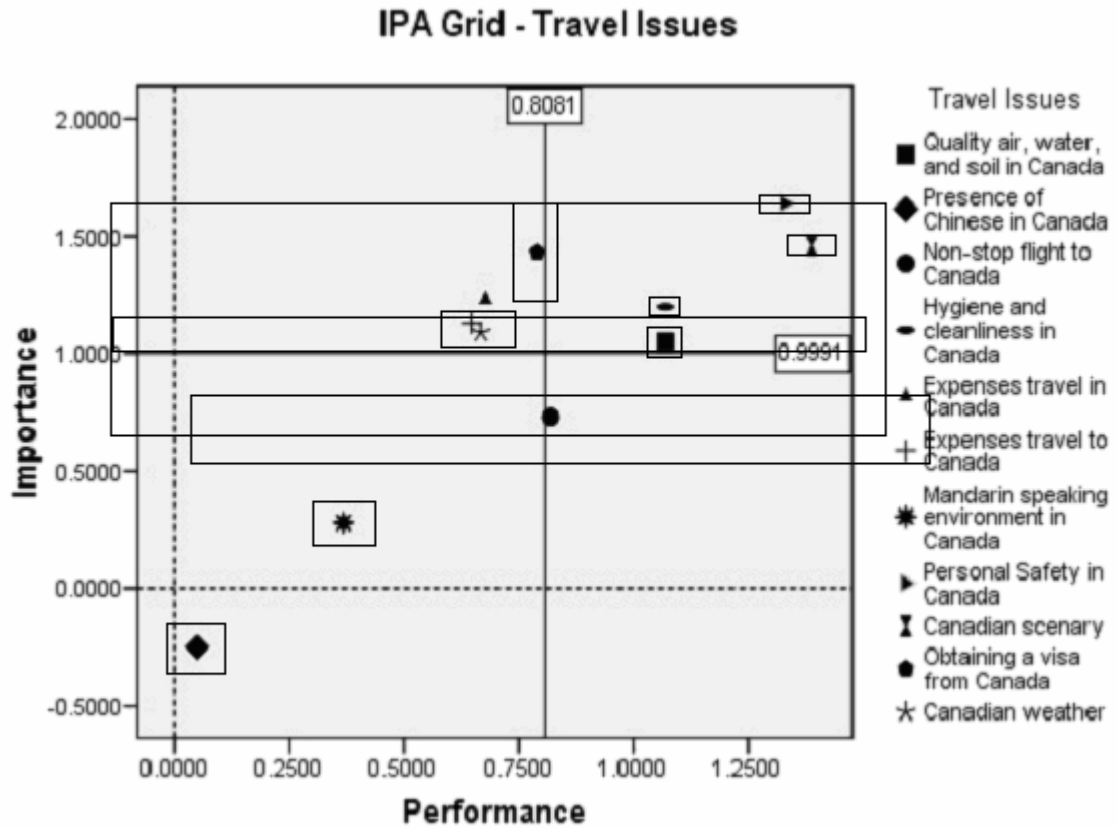
Appendix B

Self Administered Questionnaire

Dear International Traveler:

The China National Tourism Administration is negotiating Approved Destination Status with the Canadian government. In affiliation with Canadian Tourism Commission China Division, we are interested in your image of Canada as well as the trip characteristics and services that Chinese travelers such as yourself might want from traveling to Canada. This information will ensure that services offered within Canada better meet the expectations of Chinese tourists.

The questionnaire will take about 20 minutes to complete and will provide very valuable information. You may omit any question you prefer not to answer. Participation in this project is anonymous; nobody will be able to associate your responses to you. There are no known or anticipated risks to participate this study. The data collected through this study will be kept for a period of one year in a locked drawer under the supervision of Dr. Stephen Smith at the University of Waterloo.

As with all University of Waterloo projects involving human participants, this project was reviewed by, and received ethics clearance through, the Office of Research Ethics at the University of Waterloo. Should you have any comments or concerns resulting from your participation in this study, please contact Dr. Susan Sykes in the Office of Research Ethics at 1-519-888-4567, Ext., 6005.

Your responses to this questionnaire are entirely voluntary; you are not obligated in any way to participate. If you are interested in receiving more information regarding the results of this study, or if you have any questions or concerns, please contact Pengbo Zou at either 13439894435 or p2zou@ahsmail.uwaterloo.ca.

Should you agree to participate, please return the questionnaire to the researcher. We thank you in advance for your participation and look forward to receiving your answers.

Yours sincerely,

Pengbo Zou

Principal Investigator

Chinese Images of Canada Project

and

Stephen Smith

Professor

University of Waterloo

*Please answer the following questions by either checking the box following your choice of the answer, or by writing down your comments as requested. Your responses are critical to this study, and it is important that your responses are **honest**!*

Section I: Your Previous Outbound Experience and Future Outbound Travel Plans

   1.1 Have you ever traveled outside of Mainland China before?   Yes☐   No☐

   1.2 Are you currently planning a vacation outside of the Mainland China? Yes☐   No☐

   1.3 If yes to question 1.2, which country/countries are you planning to visit? What is your travel purpose?
     Country:_____Travel Purpose:_____

   1.4 Have you ever thought about visiting Canada as a vacation destination?
     Yes ☐   What is it in Canada that you would like to see or experience? For example, are there particular places you would like to see or things to do in Canada? _____

     _____
     No ☐   Why:

   1.5 If you are going to describe Canada as a tourism destination, what are the three words or phases you will use? Please indicate them in the following field.
     1_____
     2_____
     3_____

Section II: Importance of Destination Attributes in General

When choosing a destination for an overseas vacation trip, different things are important to different people. Here are some attributes that may be important to you. Please indicate how important each actually is to you by check the boxes behind the appropriate number (as in the following example). Please be sure to indicate the importance to you of <u>every</u> item. We have left room for you to add up to three more attributes that you feel are <u>very important</u> to you.

<u>Not at all important</u> <u>Not very important</u> <u>Neutral</u> <u>Important</u> <u>Very Important</u>
Importance to you: 1 ☐ 2 ☐ 3 ☐ 4 √ 5 ☐

Trip Attributes	Importance
2.01 Outstanding scenery	1☐ 2☐ 3☐ 4☐ 5☐
2.02 Reliable weather	1☐ 2☐ 3☐ 4☐ 5☐
2.03 Interesting and friendly local people	1☐ 2☐ 3☐ 4☐ 5☐
2.04 Local cuisine	1☐ 2☐ 3☐ 4☐ 5☐
2.05 Nightlife and entertainment	1☐ 2☐ 3☐ 4☐ 5☐
2.06 Local festivals	1☐ 2☐ 3☐ 4☐ 5☐
2.07 Ease of obtaining a visitor visa	1☐ 2☐ 3☐ 4☐ 5☐
2.08 Shopping	1☐ 2☐ 3☐ 4☐ 5☐
2.09 Non-stop flights to the country from China	1☐ 2☐ 3☐ 4☐ 5☐
2.10 Wilderness and undisturbed areas	1☐ 2☐ 3☐ 4☐ 5☐
2.11 Mountainous areas	1☐ 2☐ 3☐ 4☐ 5☐
2.12 Big modern cities	1☐ 2☐ 3☐ 4☐ 5☐
2.13 Local crafts	1☐ 2☐ 3☐ 4☐ 5☐
2.14 Skiing	1☐ 2☐ 3☐ 4☐ 5☐
2.15 Museums and art galleries	1☐ 2☐ 3☐ 4☐ 5☐
2.16 Wineries	1☐ 2☐ 3☐ 4☐ 5☐
2.17 Beaches for swimming and sunning	1☐ 2☐ 3☐ 4☐ 5☐
2.18 Whale watching	1☐ 2☐ 3☐ 4☐ 5☐
2.19 Coral reefs and tropical atolls	1☐ 2☐ 3☐ 4☐ 5☐
2.20 Golf	1☐ 2☐ 3☐ 4☐ 5☐
2.21 Casinos and gambling	1☐ 2☐ 3☐ 4☐ 5☐
2.22 Chance to see wildlife and birds I don't usually see	1☐ 2☐ 3☐ 4☐ 5☐
2.23 Presence of Chinese in the country	1☐ 2☐ 3☐ 4☐ 5☐
2.24 Historical, archaeological, or military sites	1☐ 2☐ 3☐ 4☐ 5☐
2.25 Personal safety	1☐ 2☐ 3☐ 4☐ 5☐
2.26 Mandarin as widely spoken language	1☐ 2☐ 3☐ 4☐ 5☐
2.27 Small towns and villages	1☐ 2☐ 3☐ 4☐ 5☐
2.28 Environmental quality of air, water, and soil	1☐ 2☐ 3☐ 4☐ 5☐
2.29 Standards of hygiene and cleanliness	1☐ 2☐ 3☐ 4☐ 5☐
2.30 Amusement or theme parks	1☐ 2☐ 3☐ 4☐ 5☐
2.31 Inexpensive travel to the country	1☐ 2☐ 3☐ 4☐ 5☐
2.32 Inexpensive travel in the country	1☐ 2☐ 3☐ 4☐ 5☐
2.33	1☐ 2☐ 3☐ 4☐ 5☐
2.34	1☐ 2☐ 3☐ 4☐ 5☐
2.35	1☐ 2☐ 3☐ 4☐ 5☐

Section III Your Perception of Canada as a Destination
The following is the same list of attributes that you ranked in Section II. If you added any other attributes to section II, please add them to the bottom of this list. The purpose of this section is to find out about your perceptions of to what degree Canada possesses the following attributes   Please check off your assessment as shown in the example.

  Not at all attractive Not very attractive Neutral Attractive Very Attractive
Attractiveness to you: 1 ☐   2 √   3 ☐   4 ☐   5 ☐

Canadian Attributes	Attractiveness
3.01 Outstanding scenery	1☐ 2☐ 3☐ 4☐ 5☐
3.02 Reliable weather	1☐ 2☐ 3☐ 4☐ 5☐
3.03 Interesting and friendly local people	1☐ 2☐ 3☐ 4☐ 5☐
3.04 Local cuisine	1☐ 2☐ 3☐ 4☐ 5☐
3.05 Nightlife and entertainment	1☐ 2☐ 3☐ 4☐ 5☐
3.06 Local festivals	1☐ 2☐ 3☐ 4☐ 5☐
3.07 Ease of obtaining a visitor visa	1☐ 2☐ 3☐ 4☐ 5☐
3.08 Shopping	1☐ 2☐ 3☐ 4☐ 5☐
3.09 Non-stop flights to the country from China	1☐ 2☐ 3☐ 4☐ 5☐
3.10 Wilderness and undisturbed areas	1☐ 2☐ 3☐ 4☐ 5☐
3.11 Mountainous areas	1☐ 2☐ 3☐ 4☐ 5☐
3.12 Big modern cities	1☐ 2☐ 3☐ 4☐ 5☐
3.13 Local crafts	1☐ 2☐ 3☐ 4☐ 5☐
3.14 Skiing	1☐ 2☐ 3☐ 4☐ 5☐
3.15 Museums and art galleries	1☐ 2☐ 3☐ 4☐ 5☐
3.16 Wineries	1☐ 2☐ 3☐ 4☐ 5☐
3.17 Beaches for swimming and sunning	1☐ 2☐ 3☐ 4☐ 5☐
3.18 Whale watching	1☐ 2☐ 3☐ 4☐ 5☐
3.19 Coral reefs and tropical atolls	1☐ 2☐ 3☐ 4☐ 5☐
3.20 Golf	1☐ 2☐ 3☐ 4☐ 5☐
3.21 Casinos and gambling	1☐ 2☐ 3☐ 4☐ 5☐
3.22 Chance to see wildlife and birds I don't usually see	1☐ 2☐ 3☐ 4☐ 5☐
3.23 Presence of Chinese in the country	1☐ 2☐ 3☐ 4☐ 5☐
3.24 Historical, archaeological, or military sites	1☐ 2☐ 3☐ 4☐ 5☐
3.25 Personal safety	1☐ 2☐ 3☐ 4☐ 5☐
3.26 Mandarin as widely spoken language	1☐ 2☐ 3☐ 4☐ 5☐
3.27 Small towns and villages	1☐ 2☐ 3☐ 4☐ 5☐
3.28 Environmental quality of air, water, and soil	1☐ 2☐ 3☐ 4☐ 5☐
3.29 Standards of hygiene and cleanliness	1☐ 2☐ 3☐ 4☐ 5☐
3.30 Amusement or theme parks	1☐ 2☐ 3☐ 4☐ 5☐
3.31 Inexpensive travel to the country	1☐ 2☐ 3☐ 4☐ 5☐
3.32 Inexpensive travel in the country	1☐ 2☐ 3☐ 4☐ 5☐
3.33	1☐ 2☐ 3☐ 4☐ 5☐
3.34	1☐ 2☐ 3☐ 4☐ 5☐
3.35	1☐ 2☐ 3☐ 4☐ 5☐

Section IV: Desired Attributes of a Trip to Visit Canada

If you are interested in Canada as a vacation destination, please provide us with your answers to the following questions. If you are not interested in Canada, please go to Section V. Based on your honest opinion, please check-off the appropriate answer for each question in this section; one question may have more than one appropriate answer.

4.01 In which season would you want to visit Canada?
    Spring (March-May)☐ Summer (June-August)☐ Fall(Sept-Nov)☐ Winter(Dec-Feb)☐
4.02 Would you be more interested in joining a tour offered by outbound travel agencies or plan the trip and
    travel by yourself?   An Outbound Tour☐   Plan and Travel by Myself☐
    Why:_____
4.03 How long would you like to spend traveling in Canada?
    1-7 days☐   8-14 days☐   15-21 days☐   22-28 days☐   More than 28 days☐
4.04 If you were offered a choice of the following two categories of tours, which would you choose?
    A tour offering a low price but without assurances that it would be of good quality.☐
    A tour with a guarantee of good quality but at a higher price.☐
4.05 Please check the types of places you would like to visit. Check as many as apply. If there are other places
        you like to visit, please indicate on the comment line.

Places		Places	
Mountains	☐	Lakes and Rivers	☐
Museums/Art Galleries	☐	Big Cities	☐
National Parks and Nature Reserves	☐	Small Towns and Rural Areas	☐
Norman Bethune's Home	☐	Seacoasts	☐
Other Historical and Heritages Sites	☐	Northern Lights	☐
Comment:			

4.06 Please check the types of accommodation you prefer. Check as many as apply.
    Guest House☐   Youth Hostels☐   Motels☐   Historic Inn☐
    1-Star Hotel☐   2-Star Hotel☐ 3-Stas Hotel☐   4-Star Hotel☐ 5-Star Hotel☐
4.07 Please check the types of local transportation preferred. Check as many as apply.
    Motor Coach☐   Trains☐   Rental Car or RV☐   Bus or Subway☐   Taxis☐
4.08 Please check the types of food you prefer. Check as many as apply
    Chinese Only☐   Western Only☐   A mix of Chinese and Western☐
    A Variety of Food from Different Cultures (*e.g.,* Italian, French, Thai, German)☐
4.09 Please check the range of budget (in RMB), you would be willing to pay for a trip to Canada.
        Below 5,000☐   5,000-9,999☐   10,000-14,999☐   15,000-19,999☐
    20,000-24,999☐ 25,000-29,000☐ 30,000 or Above☐

4.10 Where do you get information on possible vacation destinations? Please check the proper category indicating how often you use each source listed.

Source	Never or rarely use	Use sometimes	Often use
Friends and family	☐	☐	☐
Guide books	☐	☐	☐
TV advertisements	☐	☐	☐
TV programs	☐	☐	☐
Newspaper ads	☐	☐	☐
Newspaper stories	☐	☐	☐
Consumer travel shows	☐	☐	☐
Travel agencies or trip organizers	☐	☐	☐
Official tourism offices	☐	☐	☐

4.11 Assume you are on a group tour; please check the pace of the tour you prefer:
     Slow and Relaxing☐   Moderate Pace☐   Fast, Visiting Many Sights☐

Section V Demographic Information

Gender Female ☐ Male ☐ *Marital Status* Married ☐ Single ☐	
Age	Under 18☐ 19-24☐ 25-29☐ 30-34☐ 35-39☐ 40-44☐ 45-49☐ 50-54☐ 55-59☐ 60 or over☐
Education	9 or Less than 9 years☐ Middle School☐ High School☐ University☐ Graduate School☐
Household Income/month in (RMB)	Less than 1,500☐ 1,500-2,999☐ 3,000-4,499☐ 4,500-5,999☐ 6,000-7,499☐ 7,500-8,999☐ 9,000-10,499☐ 10,500-11,999☐ 12,000 or above☐
Would you like to receive a result of this study? Yes☐ No☐ *If yes, please indicate your e-mail address*	

I would like to thank you for your participation in this study. As a reminder, the data collected through the questionnaire will contribute to a better understanding of the current destination image of Canada and to assist the future creation of desirable tourism products for mainland Chinese tourists. Please remember that any data pertaining to you as an individual participant will be kept confidential.

Please mail it out in the prepaid envelope provided.
You don't have to put stamps or address on the envelope.

Appendix C Promotional Material Inventory

Name	Publisher	Time	Related Region	Characters	# of Pages
Super, Natural British Columbia	Tourism British Columbia	2004/5	British Columbia	Simplified	35
Discover our true nature	Canadian Tourism Commission	N/A	Canada	Simplified	8
Discover our true nature	Canadian Tourism Commission	N/A	Canada	Simplified	20
Canada Map	Canadian Tourism Commission	N/A	Canada	Simplified	1
Canada Vacation Guide	Brewster	N/A	British Columbia, Alberta, Quebec, and Ontario	Simplified	43
Ottawa and Outaouais	Tourism Ottawa	N/A	Ottawa and Outaouais	Simplified	6
Ontario	Ontario Tourism Marketing Partnership Corporation	N/A	Ontario	Simplified	6
Quebec Canada	Tourism Quebec	N/A	Quebec	Traditional	6
Ontario Canada	Tourism Ontario?	1998	Ontario	Traditional	26
China Marketing Plan	Ontario Tourism Marketing Partnership Corporation	2005.2006	Ontario	English	15
Quebec	Tourism Quebec	N/A	Quebec	Simplified	5
Canada	Trends Traveler-National Geographic	2005	Quebec and Ontario	Simplified	22
2005 Alberta Centennial	Travel Alberta	2005	Alberta	Simplified	34
Vancouver	Tourism Vancouver	N/A	Vancouver	Simplified	20

Appendix D

Arrival Destination

Destination	# of Entry	%
Europe	22	10.5%
Australia	18	8.6%
USA	17	8.1%
Japan	17	8.1%
Singapore	13	6.2%
Canada	12	5.7%
England	12	5.7%
Thailand	11	5.3%
Hong Kong	9	4.3%
NZ	8	3.8%
France	8	3.8%
Germany	6	2.9%
Malaysia	6	2.9%
Italy	5	2.4%
South Korea	5	2.4%
France	4	1.9%
South Africa	4	1.9%
Greek	4	1.9%
Brussels	2	1.0%
Southeast Asia	2	1.0%
Netherlands	2	1.0%
Western European	2	1.0%
Sweden	2	1.0%
Span	2	1.0%
Israel		
	2	1.0%
Nepal	2	1.0%
Swiss	2	1.0%
Macao	1	0.5%
USA Hawaii	1	0.5%
India	1	0.5%
Austria	1	0.5%
Norway	1	0.5%
Finland	1	0.5%
Russia	1	0.5%
Africa	1	0.5%
Middle East	1	0.5%
Egypt	1	0.5%
TOTAL	209	100.0%

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