



Canadian Tourism
Commission

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Global Tourism Watch
2014 China Summary Report

Canada

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1. Introduction

The Canadian Tourism Commission (CTC) began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to expand the base of consumer-based intelligence in twelve core markets around the world¹.

The overall objectives of the GTW study are to:

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

In response to a rapidly changing travel marketplace, the CTC and TNS worked together to substantially revise and update the questionnaire prior to the 2014 fieldwork. This was done to better reflect current travel realities and to gather more in-depth information on Canada's competitors in each market. The new GTW data permits direct comparison of Canada to those competitor countries unique to each market. The CTC has designated the US, New Zealand, Australia, the UK, France and Germany as the competitive set for Canada in the Chinese market, for 2014².

Methodology

In 2014, a web-based panel survey was conducted by TNS. The target population for the online survey was residents aged eighteen years and older, who had taken a long-haul pleasure trip outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan), where they had stayed at least four nights with a minimum of one night in paid accommodation in the past three years, or plan to take such a trip in the next two years.

Data was gathered from 2,199 respondents in China, including 336 recent visitors to Canada, in October 2014.

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

² The competitive set for China in 2014 remains unchanged from that of 2012. The CTC continuously reviews the competitive set for each market, and from time to time, may update it to better reflect the current realities in the marketplace.

Changes to the 2014 sample frame

For 2014, seven new Chinese cities were included in the survey, compared to the four major cities sampled in previous waves of the GTW survey. In addition to Beijing, Shanghai, Guangzhou and Shenzhen, the seven new cities added were: Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao and Nanjing.

Given the change in the sample frame for 2014, results of the GTW *survey may not be directly comparable to previous years* (the last of which was the survey conducted in 2012, with the original four cities).

Omnibus study

In addition to the GTW, a phone survey was conducted in 2014 among the *general population*³ of China aged eighteen years or over, within the same eleven cities, to measure the incidence of long-haul travel in China, beyond East Asia. In total, 4,475 interviews were conducted.

This data was used to weight the GTW results, and provide an estimate of the incidence of long-haul travel, in order to calculate the *potential* and *immediate* potential market for Canada.

³ The GTW survey only samples Chinese long-haul travellers, and those intending to take a long-haul vacation in the next two years. The omnibus survey is conducted among all Chinese aged eighteen years or over, regardless of their travel experience, in order to derive an estimate of the *incidence* of long-haul travel among the Chinese population, in those eleven cities.

2. Strategic Considerations

The key strategic considerations for Canada, arising from the 2014 results of Chinese long-haul travellers, can be summarised as:

1. The size of the outbound tourism market in China is quite staggering, with Chinese travellers making 67.5 million overnight trips abroad in 2014, representing year-on-year growth of around 14% (Tourism Economics, 2015). The Chinese traveller is being aggressively pursued with considerable resources, especially in the South Pacific and the US. While the size of the opportunity is immense, the competition is fierce. However, given the *size of the pie*, even moving the needle on awareness and consideration just a small amount, can yield significant growth in the number of tourists arriving from China.
2. Canada's offer fits well with the emerging trend in China for independent travel, *off the beaten track*, and an experience quite different from the traditional groups tours which many Chinese travellers have enjoyed in the past. *Beautiful scenery* is the main product-interest, and an attribute that Canada is well-placed to provide. The challenge is raising awareness of this fact – Chinese travellers are simply not familiar with what Canada can offer. This presents a great opportunity for Canada, given the fact that awareness is somewhat easier to attack than preference over competing destinations. Marketing efforts should be focused on the very early stages of the path-to-purchase.
3. There is evidence that Canada is being overtaken in the race to attract the attention of Chinese travellers. *Familiarity* with Canada's offer is not strong, and *consideration for Canada* has slipped, with countries such as Thailand and France making significant headway. Canada, like the US, lags some way behind the competitive set on *brand attributes*, but is able to leverage city experiences, and ultimately is seen as *better value*. The lack of awareness around Canada, and the experiences it can offer, is the biggest barrier to changing perceptions around the *value* Canada provides to visitors.
4. With regards to the *cost* of visiting Canada, there is better news, with the price of a flight adjudged to be on par with the US and France, and only slightly behind Australia and New Zealand. As a result, the cost of a vacation to Canada is not considered a significant barrier (unlike some of Canada's other long-haul markets, where it is considered the number-one barrier). This puts Canada on a level-playing field with the competition.
5. The perception that the weather in Canada is *poor* needs to be smashed. While there are travellers who favour a warmer climate, Canada cannot compete against the Asia and the South Pacific on this front. However, the fact that the weather is seen as a major barrier to visitation suggests that those seeking the kind of experiences Canada can offer, may be put-off through misperceptions. The fact is, some of the imagery promoting Canada may in fact be contributing to this, along with high-profile events such as the Winter Olympics, which may have helped reinforce the persona that Canada is for those seeking snow and who don't mind the cold. Such images are unlikely to help change this perception of Canada.
6. With the trend towards independent travel, and less reliance on travel agents, the use of online and mobile applications to research and book travel has exploded. Countries hoping to attract Chinese tourists have to be able to engage through digital channels, and provide

the means by which the entire path-to-purchase can be navigated *online*, on mobile devices – these are table stakes to compete for their business.

7. Advocacy is key to promoting a destination, with friends and family the most trusted and influential source of information and advice when deciding *where to go*. Advocacy among Chinese travellers, who have been to Canada, is not as strong as we might have hoped – just over half (55%) would recommend Canada to a friend, relative or colleague, based on their experience here. While very few would say anything negative about their trip (8%), this leaves one-in-four (38%) still *unlikely to recommend Canada*. While encouraging advocacy as means to market Canada is an effective means to increase awareness and consideration, we also need to understand why some visitors are reluctant to sing the praises of Canada.

3. Key Observations

The following section summarises the key points of interest from the 2014 survey of Chinese long-haul travellers.

Key findings:

- The size of the Chinese outbound travel market, and the exceptional rate of its growth, has attracted considerable attention from marketers around the world looking for a slice of the ever-increasing pie, especially in the South Pacific. The size of the potential market for Canada is also significant, estimated at 7.3 million long-haul travellers over the next two years, based on 2014 estimates of population and propensity for long-haul travel among the Chinese (see Market Potential).
- Familiarity with Canada, and what it has to offer, is relatively weak today among Chinese travellers (38%), compared to Canada's other international markets, but is marginally up on 2012 (36%)⁴. However, this presents a real and considerable opportunity to increase the number of visitors from China simply by raising awareness of what we have to offer⁵. With Approved Destination Status (ADS) only being granted to Canada ahead of the 2010 winter games in BC, Canada is still working to build awareness and consideration.
- That said, competition for the Chinese traveller is fierce, and a considerable amount of work is required just to keep pace with countries such as the US, New Zealand and Australia, all of which have been directing considerable resources at the Chinese market. Canada's position in the competitive ranking for consideration has slipped from 5th in 2012 (13%) to 9th in 2014 (12%), as interest has grown in these competitor destinations. Interest in Canada is the lowest amongst the competitive set of destinations.
- On brand attributes, the relatively low level of familiarity with Canada translates into a fairly weak position compared to the competitive set, and aligns more closely with the UK and Germany, as opposed to the favoured destinations of Australia, New Zealand, France and the US.
- Canada is widely recognised for its outstanding natural beauty and scenery⁶, but receives little recognition from Chinese travellers who only really differentiate Australia and New Zealand's offer. On authenticity, local flavour & cuisine, exploring cities, creating extraordinary experiences, meeting the people and exploring the culture, Canada falls short of the top-ranked destinations.

⁴ Results of the 2014 GTW study may not be directly comparable to 2013, due to the sample area being increased from four to eleven Chinese cities / metropolitan areas.

⁵ Around 72% of Chinese long-haul travellers say they are not really very familiar with Canada as a vacation destination, and what it can offer them. Rather than converting travellers who may already be very familiar with Canada, but have a preference for other destinations, it might be reasonable to expect that some of those travellers might well be interested, if they only knew more about Canada.

⁶ Based on the GTW results for the rest of Canada's long-haul markets.

- Given the lack of awareness around what Canada has to offer them, it is perhaps no surprise that Chinese travellers do not rate us for value, placing Canada in the bottom-two on all value attributes alongside the UK. Again, France, New Zealand and Australia lead the competitive set of vacation destinations, with Australia crowned the dream destination, if money were no object.
- On the cost of a vacation, Canada is on par with both the US and France, in terms of the cost of airfare, although perceived to be relatively more expensive for food, entertainment and accommodation. Given the fact that airfare comprises a considerable portion of the costs of a vacation, it places Canada on a level playing ground, at least with the US.
- ‘Value for money’ was not considered a major barrier to visiting Canada, among those who were considering a trip here in the near future (13%), but one-in-four did fear it might be *Too expensive* (25%). *Safety concerns* (34%) and the *Poor weather* were the factors most likely to make them think twice about a potential trip, or perhaps opt for an alternative destination in preference to Canada. By comparison, the climates in their preferred destinations (based on visitation and consideration) are considerably warmer than that afforded by Canada, even in the summer.
- Among those Chinese travellers who are considering a trip to Canada, the aspect of that trip which *intrigued or excited them the most* was the natural scenery (51%). This fits well with their product interests, with *seeing beautiful scenery* placed top of their list when they were asked about their interests in 2012⁷. This suggests that those more familiar with Canada do recognise what it has to offer.
- More than half (55%) of Chinese travellers who have in fact visited Canada, would recommend it to friends and family, compared to around two-thirds who would have visited New Zealand (68%), France (66%) and Australia (64%). The level of endorsement for Canada aligns more closely to the UK (56%) and Germany (54%). Canada’s Net Promoter Score (NPS) dropped six points from 2012, with France and New Zealand making considerable gains. Understanding why 45% of visitors from China were reluctant to praise their experience of Canada should be a top priority for this market.
- The importance of advocacy cannot be underestimated. Friends and family are the most *influential* source of information on *where to go*, and the number-one source of awareness. The relatively low NPS score needs to be examined in order to determine how recommendation by friends and family can be more effectively leveraged.

⁷ The 2012 survey asked them to rate their product interests, with 86% pointing to *beautiful scenery*, as the most popular response.

4. Market Health and Outlook

Background

The Chinese economy

Since 1978, following major economic reforms, China has experienced an average rate of growth of 10% per annum, helping over 500 million people to cross the poverty line⁸ (The World Bank, 2015). However, despite the phenomenal level of growth, the fortunes of China's 1.35 billion people vary dramatically and economic inequalities remain significant.

Today, China is the world's second largest economy after the US, with a Gross Domestic Product (GDP) of \$9.24 trillion (US) in 2013 (International Monetary Fund, 2014), and the largest in terms of purchasing power parity, according to the IMF.

Recently however the East Asia Pacific (EAP) region has experienced slower growth, slipping to 6.9% in 2014 as a result of policy tightening and political tensions, with a further decline in the rate of growth predicted for 2015, to 6.5% (The World Bank, 2015).

In China, the significant risk of deflation and a rapidly weakening property and real estate sector is likely to slow down credit expansion, resulting in growth of 6.9% by 2017, with 7.4% forecasted for 2015 (The World Bank, 2015).

Consumer confidence, although still buoyant, has fallen back from the levels seen since 1991 (109.7) to 105.7 in January 2015, down marginally on December 2014 (105.8) (National Bureau of Statistics China, 2015).

Despite the slow-down in economic growth, other factors have played in favour of the Chinese consumer. Inflation was recorded at just 0.8% in January 2015, a drop from 1.5% in December the previous year. This is a record low considering it has averaged 5.65% since 1986 (National Bureau of Statistics China, 2015).

Travel Outlook

- China is one of the world's largest outbound tourism markets, with an estimated 67.5 million overnight arrivals by Chinese travellers in 2014 - a 13.9% increase over 2013 - (Tourism Economics, 2015), and total tourism expenditures totalling \$128.6 billion in 2013 - a 26% increase over 2012 (UNWTO, 2014). The growth is generally attributed to a developing economy, growing demand for tourism, appreciation of the currency, welcoming visa policies and the increased number of international flights (Travel China Guide, 2013).
- With long-haul travel accounted for about a fifth of the total Chinese outbound travel in 2013, the size of China's long-haul travel is considerable, totalling an estimated 15 million overnight arrivals worldwide (Tourism Economics, 2015).

⁸ China's poverty rate fell from 84% in 1981 to 13% in 2008.

- The Chinese outbound travel is expected to continue its spectacular growth in years to come as the Chinese middle-class expands and more countries relax their visa policies for Chinese travellers. It is estimated that China's outbound travel will nearly double by 2020 (CLSA Limited , 2015)

Travel trends

- Chinese travellers are increasingly looking to organise their own holiday instead of using tour companies. Of those who did employ a travel agency in 2013 (approximately 33 million), 83% travelled to nearby Asian destinations, 11% to Europe, and 2% to the US (Travel China Guide, 2013). According to the Chinese International Travel Monitor (CITM), published in July 2014, around two-thirds of Chinese consumers prefer to travel independently, due to higher disposable income, growing public knowledge of Western cultures and the increasing number of direct flights to foreign cities (Attract China, 2015).
- Chinese travellers are big spenders – on average US\$3,252 per person, per trip, and are the world's biggest tax-free shoppers, spending more than US\$1,041 on tax-free goods. It is also reported that 44% of Chinese travellers made trips for the purpose of shopping (World Tourism Cities Federation, 2014).
- The same report, by Hotels.com, revealed that 75% of respondents surveyed wished to travel to Europe within the next year, with Paris the most searched-for destination on the Hotels.com website (Visit Britain, 2014).
- Given the size of the pie, many countries are keen on attracting Chinese tourists, and in 2014, Australia launched a US\$250 million advertising campaign aimed at Chinese travellers, which included broadcast, print and digital advertising highlighting key attractions. China is now the second-largest source of visitors for Australia (second to New Zealand only) (World Tourism Cities Federation, 2014).
- The CLSA predicts that the US and France will see the largest growth in inbound Chinese tourists by 2020, as travellers forgo the popular destinations of Hong Kong and Macau for more 'exotic' locales further afield (China outbound travel & tourism market, 2014). The same report estimates that 64% of Chinese travellers are interested in traveling overseas in the next twelve months (2015) and 67% plan to increase their travel budget.
- In November 2014, the US and China mutually agreed to increase the visa validity for short-term business travellers, tourists and students. Chinese travellers can now continually visit the US for ten years on a single visa, and the visa application itself has been eased to reduce the need for assistance from travel agents. It is predicted that the new policy will result in up to 7.3 million Chinese visitors to the US by 2021, according to a report by the US Department of Commerce (Attract China, 2015).
- The US is not the only country relaxing visa restrictions in an effort to attract Chinese tourists. The UK and Schengen countries⁹ (Europe) have made it considerably more easier

⁹ The Schengen Area is the area comprising 26 European countries that have abolished passport and any other type of border control at their common borders, also referred to as internal borders. It mostly functions as a single country for international travel purposes, with a common visa policy.

to obtain a visa, while some have even introduced visa-waiver programs, such as the holiday islands of Mauritius, Seychelles, Maldives and Jamaica, among others (Forbes, 2014).

- The new wave of Chinese tourists consider themselves explorers and seek local, unique experiences that other Chinese travellers, especially those taking group tours, do not have access to. Experiential travel, that emphasises different areas of local life – culinary, culture, history, shopping, nature or social life, is the emerging trend amongst the new breed of Chinese tourists (Attract China, 2015).
- According to the China Internet Network Information Centre, China now boasts more than 620 million internet users, more than 80% of whom access to the web via a mobile device. The number of those using mobile applications (apps) has grown from 6% in 2013 to 17% in 2014. This has resulted in travel booking moving online, via the web or mobile apps – a method particularly popular with independent travellers (Attract China, 2015).

5. Market Potential

Exhibit 5-1 provides an estimate of the size of the potential market for Canada in two ways – the macro target market and the immediate potential.

The target market is a broader estimate of the market size based on expressed interest among all Chinese long-haul travellers (market size estimate derived from the 2014 omnibus study of the Chinese adult population). The proportion of GTW respondents who are “definitely”, “very”, or “somewhat” interested in Canada in the next two years is applied to the broader traveller population to come up with a target market estimate of 19.2 million.

The immediate potential is a more conservative estimate based on GTW respondents who say they are “definitely” likely to visit Canada in the next two years. This translates into a market of 7.3 million travellers with more immediate potential for conversion.

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

Measure	Size of Potential Market to Canada
Total potential long-haul pleasure travellers (aged 18 plus)	21,357,000
Target market for Canada:	
Definitely / very / somewhat interested in visiting Canada in the next two years	90%
Size of the target market	19,221,000
Immediate potential for Canada:	
Will definitely visit Canada in the next two years ¹⁰	34%
Immediate potential	7,261,000

Base: Long-haul pleasure travellers (n = 2,199)

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

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

Note: The size of the long-haul market is based on an omnibus survey conducted in 2014, among Chinese adults aged eighteen years or more, to determine the incidence rate for long-haul travel in the eleven cities sample by the GTW.

¹⁰ Includes respondents likely to visit Canada for a trip of one to three nights, or a trip of four nights or more.

Exhibit 5-2 estimates the immediate potential for each of Canada's ten regions, based on the destinations they stated they are *likely* to visit.

Exhibit 5-2 Market potential for each of the regions

Measure	BC	ON	ATL	QC	AB	MB	SK	YK	NWT	NU
Immediate potential for Canada	7,261,000									
Likely to visit region	91%	81%	41%	36%	33%	4%	4%	4%	3%	2%
Immediate potential for the regions (000s)	6,608	5,881	2,977	2,614	2,396	290	290	290	218	145

Base: Those likely to visit Canada on a trip of one to three nights, or four or more nights, in the next two years (n = 1,589)

Q16: If you were to take a holiday trip to Canada in the next two years, which of the following Canadian travel destinations are you likely to visit?

Note: Regions are ranked from left to right, in descending order, based on the size of the *immediate potential*.

British Columbia (6.6 million) and Ontario (5.8 million) are the two provinces Chinese travellers are most likely to visit, followed by the Atlantic provinces (3 million, combined).

6. Competitive Environment

The GTW tracks key performance indicators (KPIs) for Canada in areas such as aided destination awareness, unaided and aided destination consideration, and market penetration. Exhibit 6-1 summarises the 2014 KPIs for Canada¹¹.

Just over a third (38%) of Chinese long-haul travellers rate their knowledge of vacation opportunities in Canada as either *excellent* or *very good*, up slightly on 2012 (36%)¹². This level of awareness puts Canada level with the UK, behind the US (50%), Australia (48%), France (44%) and New Zealand (43%), in the competitive set of countries for the Chinese market¹³.

Knowledge of what Canada can offer is noticeably lower among the younger population, i.e., 18 to 34 years (32%), those without children (32%) and those on lower household incomes. Among those aged 55 years+ (43%), those with children (43%) and those with a household income excess of 20,000 ¥ (48%), familiarity with Canada was significantly higher.

Around one-in-ten (11%) of Chinese long-haul travellers have visited Canada, at some point, but it is worth noting that Canada only gained *Approved Destination Status* in 2010¹⁴. Visitation from China is relatively low compared to other international destinations, some way behind the likes of Australia (31%), the US (29%), Thailand (27%), France (21%) and New Zealand (18%), among others. Visitation to Canada is down slightly on 2012 (13%), but this might be attributable to a lower rate of incidence of travel to Canada among the seven new cities sampled.

The level of consideration (unaided) for international destinations follows a similar pattern – 12% of Chinese long-haul travellers are seriously considering a trip to Canada in the next two years – about half the number who are considering the US, or destinations in the US (25%) – which places at the top of their consideration list.

When asked specifically about long-haul travel intentions in the next two years (aided)¹⁵, 90% of Chinese travellers were *somewhat*, *very* or *definitely* interested in Canada – remarkably this was the lowest level of interest of the competitive set of seven destinations¹⁶.

A similar level of enthusiasm was expressed when asked specifically realistically, *how likely are you to take a trip to Canada in the next two years?* – 70% believed it was likely.

¹¹ Unaided destination awareness was dropped from the 2014 survey.

¹² 2014 results may not be directly comparable to 2012, and previous years of the GTW study, as seven new Chinese cities were added to the sample frame for 2014.

¹³ The competitive set for the Chinese market is: Australia, the US, France, the UK, New Zealand and Germany.

¹⁴ Canada was granted Approved Destination Status (ADS) by China in June 2010, allowing the CTC and travel trade to actively market Canada directly to Chinese consumers. Since then, CTC-China has undertaken a variety of marketing activities that have increased the awareness of Canada in China and Chinese visitor numbers to Canada.

¹⁵ Percentage of respondents who are definitely interested, very interested or somewhat interested in visiting each of the countries presented to them (seven in total), in the *next two years*.

¹⁶ It has been noted that Chinese travellers are very enthusiastic regarding their travel intentions, compared to travellers surveyed in other international markets.

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

Key Performance Indicator	Definition	All Long-Haul Travellers	Recent Visitors to Canada ¹⁷	Interested in Canada ¹⁸
		n = 2,199	n = 336	n = 587
Destination awareness:				
Aided awareness of travel opportunities in Canada	% with excellent / very good knowledge of travel opportunities in Canada	38%	81%	72%
Past visitation:				
Overall market penetration	% who have ever visited Canada for pleasure	11%	100%	21%
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ¹⁹	12%	30%	34%
Competitive positioning on destination consideration	Rank on the consideration list relative to competitors (roll-up)	9 th	2 nd	1 st

Base: Long-haul pleasure travellers (n = 2,199), Recent visitors to Canada (n = 336) and those interested in visiting Canada (n = 587)

Aided awareness (Q4) – “How would you rate your level of knowledge of vacation opportunities in each of the following destinations?” (Aided list of Canada plus six pre-defined long-haul competitors).

Market penetration (ever visited) (Q11 b) – “Which of the following countries have you ever visited while on a vacation trip?” (Aided list of long-haul destinations).

Unaided destination consideration (Q2) – “Which destinations are you seriously considering for your trips in the next two years?” (Open-ended, coded responses).

The outlook for future travel is also very positive, with 82% of Chinese travellers believing they will *travel more* in the next two or three years. Only 1% believed they would *travel less*. The Market Outlook Indicator (MOI) – the net difference between the number who believe they will *travel more*, compared to *travel less*, is +81²⁰ for Chinese travellers, and has grown significantly from 2012 (+74). These numbers are remarkably high compared to travellers in Canada’s other international long-haul markets.

The increase in the MOI score is driven by the proportion of long-haul travellers who believe they will *travel more* in the next two years – up from 75% in 2012 to 95% in 2014. It should be noted however that the number of cities sampled increased from four in 2012, to eleven in 2014, so results may not be directly comparable.

Asked to consider their spend on travel, in relation to spend on a range of common household expenditures²¹, two-thirds said they would *spend a little more* on travel *outside of their own*

¹⁷ Visited Canada in the past three years for a pleasure trip of four or more nights with one or more nights in paid accommodations.

¹⁸ Definitely interested in visiting Canada in the next two years.

¹⁹ For trips in the next two years.

²⁰ 82% believe they will travel more, compared to 1% who said they would travel less: 82% - 1% = 81% or +81.

²¹ A new question added to the 2014 survey.

country. This is about the same level as the number who said they would be spending a little more on travel *within* China (65%). These numbers, while incredibly high, are consistent with other survey results conducted elsewhere²².

The incredibly high level of optimism around future travel intentions may reflect rapidly improving economic circumstances in China, or may, in part, be attributable to cultural nuances in the way the survey questions are responded to.

There is little doubt that consumer confidence has been buoyant since a slump in July 2013, with the China Consumer Confidence index, as reported by the National bureau of Statistics of China, steadily growing throughout 2014²³.

²² The Asia brokerage group CLSA conducted a study which found that 64% of Chinese travellers are interested in travelling overseas in the next twelve months, while 67% planned to increase their travel budget.

²³ In July 2013, the index was 97, which grew to around 106 by January 2015.

7. Perceptions of Canada

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

Brand perceptions

Exhibit 7-1 shows Canada's competitive position based on Chinese travellers' perceptions around a number of brand-related attributes, whether they have been to Canada or not²⁴.

While the results show that Canada is in a relatively weak position, compared to the competitive set of destinations, it does highlight the opportunity to greatly improve perceptions around what Canada has to offer, and reflects the fact that familiarity with the Canadian brand is relatively poor²⁵.

Given Canada's worldwide reputation for outstanding natural beauty, it is somewhat surprising that Canada does not place higher for *a place that inspires me to explore its geography*. From the 2012 GTW survey results, we know that *seeing beautiful scenery* was the top product-interest for Chinese travellers (86%), followed by *exploring nature with city amenities nearby* (85%).

Improving awareness of what Canada has to offer, particularly around natural beauty and incredible scenery, presents a great opportunity to significantly increase consideration for Canada, and to generate some interest.

The US does not fare much better on most attributes, but is much more highly regarded when it comes to *exploring its cities*.

Australia, New Zealand and France are the most coveted destinations and the stiffest competition for Chinese travel dollars.

Exhibit 7-1 Brand perceptions

Brand Perceptions	1#	2#	3#	4#	5#	6#	7#
A place that offers an authentic experience	NZ 72%	AUS 69%	FRA 68%	USA 64%	CAN 62%	UK 61%	GER 61%
A place that inspires me to explore its geography	AUS 71%	NZ 70%	FRA 63%	USA 62%	CAN 61%	GER 58%	UK 57%
A place that inspires me to sample local flavour	AUS	FRA	NZ	GER	USA	CAN	UK

²⁴ The base consists of all long-haul travellers, regardless of whether they have been to Canada or not, and is based on their *perceptions* of what Canada has to offer, regardless of their familiarity with Canada's offer.

²⁵ Just over a third (38%) of Chinese travellers rated their knowledge of what Canada has to offer as either *excellent* or *very good*.

Brand Perceptions	1#	2#	3#	4#	5#	6#	7#
and cuisine*	71%	70%	68%	63%	61%	60%	56%
A place that inspires me to explore its cities*	AUS 65%	USA 65%	FRA 63%	UK 62%	NZ 62%	CAN 59%	GER 59%
A place where I can create extraordinary personal travel experiences*	AUS 68%	FRA 65%	NZ 64%	USA 62%	GER 60%	CAN 58%	UK 57%
A place that inspires me to meet and engage with its people	FRA 65%	AUS 64%	NZ 64%	USA 62%	GER 57%	CAN 57%	UK 54%
A place that inspires me to explore its culture	FRA 70%	NZ 67%	AUS 66%	UK 63%	GER 62%	USA 62%	CAN 59%

Base: Long-haul pleasure travellers (n = 2,199)

Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?

Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, on a 1 to 10 scale of agreement with each statement.

*Note: New attribute added for the 2014 survey.

Value perceptions

Given the relatively low level of appreciations for Canada's offer, it is not surprising that on *value*, Canada trails all but the UK, as shown in Exhibit 7-2. Canada places last for a *destination with the travel experiences I am specifically looking for*, and yet almost all travellers in Canada's competitive markets put Canada right up at the top when it comes to their number-one product interest – seeing beautiful scenery.

While the results may therefore look a little disappointing at first glance, they present a real opportunity to educate the Chinese about Canada, with opportunities for real growth.

Exhibit 7-2 Value perceptions

Value Perceptions	1#	2#	3#	4#	5#	6#	7#
A dream destination that I would visit if money were no object	AUS 73%	NZ 68%	USA 68%	FRA 66%	GER 61%	CAN 61%	UK 60%
A place with unique features that other destinations don't offer	FRA 70%	NZ 70%	AUS 70%	USA 62%	GER 62%	CAN 61%	UK 59%
A destination I would pay a little more for	AUS 65%	FRA 63%	NZ 62%	USA 62%	GER 59%	CAN 57%	UK 56%
A destination with the travel experiences I am specifically looking for	AUS 72%	NZ 69%	FRA 68%	USA 66%	GER 63%	UK 62%	CAN 61%

Base: Long-haul pleasure travellers (n = 2,199)

Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?

Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, on a 1 to 10 scale of agreement with each statement.

Price perceptions

Exhibit 7-3 reveals that the cost of air travel is not really a significant barrier for any of the countries in the competitive set. While Australia and New Zealand may enjoy a slight advantage here, Canada is no more disadvantaged than France or the US, which suggests it really is only about increasing consideration and preference for Canadian destinations and attractions.

Given the relatively low level of familiarity with Canada, the perceptions around the cost of food, entertainment and accommodation may not be particularly well-founded.

On *value*, it does not appear to be so much the cost of travel within the equation, but just how highly they regard Canada's product-offering, which can certainly be improved through better education and increasing awareness.

Exhibit 7-3 Price perceptions

Price Perceptions	1#	2#	3#	4#	5#	6#	7#
A destination that is affordable to get to by air	NZ 48%	AUS 48%	FRA 44%	CAN 43%	USA 42%	GER 42%	UK 40%
A destination with reasonable prices for food, entertainment and accommodation	NZ 62%	AUS 61%	USA 58%	FRA 57%	CAN 55%	GER 53%	UK 49%
A place that offers good value for money	AUS 66%	NZ 65%	USA 65%	FRA 61%	GER 60%	CAN 58%	UK 54%

Base: Long-haul pleasure travellers (n = 2,199)

Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?

Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, on a 1 to 10 scale of agreement with each statement.

8. Trip Profiles

The following section describes the most recent long-haul trip taken by Chinese travellers²⁶ in the past three years. Where that trip might have included more than one destination, the results refer to the destination they *spent the most time in*.

Most recent destination visited

The most popular destinations for Chinese travellers, as measured by where they took their *most recent long-haul vacation*, are Australia (25%), Thailand (20%), the US²⁷ (18%) and Singapore (17%), with the most popular European destination being France (12%).

Those that have either visited Canada, or are interested in doing so, are more likely to have visited Australia on their last trip, suggesting there could be some overlap around product interests, or vacation type.

Type of vacation taken

Based again on their *most recent long-haul vacation*, touring holidays were by far the most popular (41%) and some way ahead of *city vacations* (15%). While touring was popular among those who visited Canada (29%), the noticeable differences were *visiting friends and family* (8%) and *shopping* (12%), which were more likely when they visited Canada, compared to all long-haul destinations.

Activities participated in

The most popular activities enjoyed by Chinese travellers on vacation were *guided city tours* (45%), *marine life viewing* (36%), *day cruises* (33%) and *guided excursions beyond the city* (31%), as shown in Exhibit 8-1.

Among those that had recently visited Canada, *wildlife viewing* (34%), *flightseeing* (30%), *hiking* (24%) and *fishing* (22%) were also popular, and more so than long-haul vacations in general. Winter sports and activities, especially *downhill skiing* (16%), were also more likely to be enjoyed when visiting Canada, but are somewhat of a niche activity among all travellers.

²⁶ Based on Q26: 'Which of these destinations [in the past three years] did you visit on your most recent trip?' and Q27: 'Which destination did you spend the most time in?'

²⁷ Excluding Hawaii. Incidence of travel to Hawaii is 3%, and is reported separately.

Exhibit 8-1 Most recent trip: Activities participated in (Top-ten)

Activity Participated In	All Long-Haul Travellers	Recent Visitors to Canada ²⁸
	n = 1,646	n = 336
Guided city tour	45%	38%
Marine life viewing (whale watching or other sea life)	36%	34%
Day cruise	33%	31%
Guided excursion beyond the city	31%	30%
Wildlife viewing	28%	34%
Flightseeing (by plane or helicopter)	24%	30%
Hiking	18%	24%
Camping	18%	21%
Fishing	17%	22%
Cycling or biking	15%	15%

Base: Those who have taken a long-haul pleasure trip in the past 3 years

QPT2: Did you participate in any of the following activities during your last holiday? Please select all that apply.

Places visited

Given the popularity of visiting cities, and city excursions, it is not surprising to see visits to *city parks* (58%) as the top place of interest, especially among those Chinese travellers aged fifty-five years or more (71%), as shown in Exhibit 8-2.

Other popular attractions were *historic sites or buildings* (53%), *museums* (49%), *world heritage sites* (44%), *national or state parks* (44%) and *amusement parks* (44%).

Older travellers (55 years+) were far more likely to enjoy the *heritage sites*, *national parks* and *botanical gardens*.

²⁸ Visited Canada in the past three years for a pleasure trip of four or more nights with one or more nights in paid accommodations.

Exhibit 8-2 Most recent trip: Places visited (Top-ten)

Places Visited on Vacation	All Long-Haul Travellers	Recent Visitors to Canada ²⁹
	n = 1,646	n = 336
City park	58%	62%
Historic site or building	53%	44%
Museum	49%	48%
World heritage site	44%	43%
National or provincial park	44%	50%
Amusement or theme park	44%	54%
Botanical garden	33%	44%
Winery	28%	37%
Art gallery	22%	28%
Casino	14%	9%

Base: Those who have taken a long-haul pleasure trip in the past 3 years (n = 1,646)

QPT3: Did you visit any of the following types of places during your last holiday? Please select all that apply.

Note: New question added for 2014.

²⁹ Visited Canada in the past three years for a pleasure trip of four or more nights with one or more nights in paid accommodations.

Vacation experiences

Exhibit 8-3 shows the experiences Chinese travellers enjoyed on their last trip, whether their last trip was to Canada, or elsewhere.

Exhibit 8-3 Most recent trip: Experiences enjoyed

Experience	All Long-Haul Travellers	Recent Visitors to Canada
	n = 1,646	n = 336
Tried local cuisine	80%	73%
Dined at a highly-regarded restaurant	48%	48%
Took a tour or visited a museum to learn about aboriginal people	43%	40%
Attended a live show (e.g. comedy musical or theatre show)	41%	39%
Tried agritourism (e.g. visited a farm)	33%	37%
Visited a spa or wellness centre	22%	33%
Participated in a guided tour by train	22%	25%
Attended a music festival	20%	24%
Rented a car	19%	20%
Northern (or southern) lights	10%	25%

Base: Those who have taken a long-haul pleasure trip in the past 3 years (n = 1,646)

QPT4: Did you see or experience any of the following during your last holiday? Please select all that apply.

Note: New question added for 2014

Type of accommodation

When it came to accommodation, *resort hotels* (56%) were the most popular, even when staying in Canada, followed by *mid-priced hotels* (29%) and *luxury urban hotels* (23%).

There were some noticeable differences among those whose last trip was to Canada – they were more likely to have stayed in a *luxury urban hotel* (34%), *home of friends or relatives* (15%), *rented a house, apartment or condominium* (13%), a *camping or trailer park* (14%), *university or school dormitory* (10%) and *own cottage of second home* (8%).

Almost one-in-five (19%) of those aged fifty-five or older stay with friend and family, almost twice the number of those aged 18 to 34 years.

Travel party

Around three quarters of those aged thirty-five years or more travel with their spouse or partner, while one-in-five (21%) travel with at least one child.

While only 7% travelled alone, this increased significantly to 13% for those whose last trip was to Canada, and Chinese travellers were more likely to be travelling with children or their parents

when visiting. Almost a quarter (23%) of those under the age of thirty-five travelled with a friend(s), and only two-thirds (64%) went on vacation with a spouse.

Sharing experiences *during* the trip

Increasingly, travellers are turning to the internet and social media to share their experiences and to search for information *while on their trip*. A large majority (58%) of Chinese travellers shared photos or video through social media *while still on their vacation*, while a third submitted an opinion to a travel review website. The use of social media was significantly higher (66%) among those aged between 18 and 34 years old.

Visitors to Canada were even more likely to share their photos, videos or opinions. They were more likely to: *submit their opinion to a travel review website* (48%), *blog about their trip* (39%), *share photos or videos through email* (44%), *check what to do via a mobile app* (32%) or *through social media* (27%).

Sharing experiences *after* the trip

Similarly, visitors to Canada were significantly more likely to share their opinions upon returning from their trip, either by *submitting their opinions to travel review websites* (60%) or *blogging about the trip* (55%).

While two-thirds of Chinese long-haul travellers talk to their friends or family about their trip, curiously those whose last trip was to Canada, were less inclined to do so (48%). This still accounts for almost half, and may be down to the fact that they were more actively sharing their experiences *while on their trip*.

Booking travel

Traditionally, Chinese travellers have relied heavily on travel agents to book flight and accommodations, and to provide information and assistance with visas, where required. It does appear, however, that as the trend towards independent travel continues, more travellers are becoming responsible for making their own arrangements.

In 2012, almost two-thirds (63%) used a travel agent to help them book their long-haul vacation, while nearly a quarter (23%) turned to a travel agent for information, but booked the trip themselves.

In 2014, just over half (54%) employed an agent to book their flights and / or accommodation, while an increasing number (30%) relied on the agent for information only, and booked the flights or accommodation themselves.

When it comes to booking flights, those who did not choose to use a travel agent either booked online (through a travel agency) or online retailer (45%), or booked their flights directly with the airline(s) (54%).

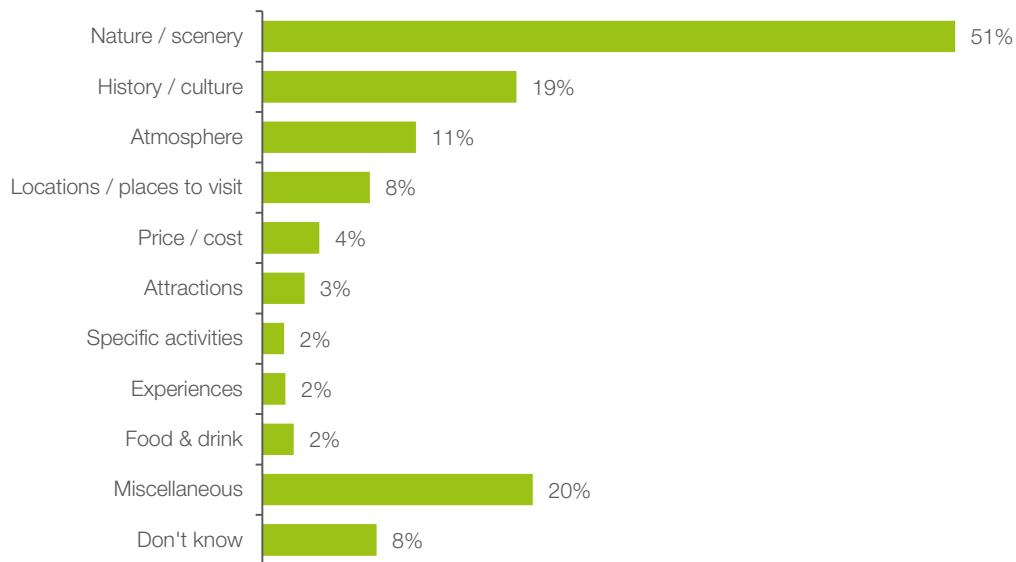
For their accommodation, around half (51%) again used an online retailer, while only a third (34%) booked directly with the accommodation provider.

9. Attraction of Canada

A new question for 2014³⁰ asked those travellers *considering a trip to Canada* what intrigued or excited them most about a potential visit to Canada?³¹.

Exhibit 9-1 shows the coded results, grouped by common themes, revealing those aspects of a potential trip to Canada which Chinese travellers were most enthused about.

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



Base: Respondents considering a trip to Canada (n = 1,294)

QT11: “What intrigues or excites you most about a potential visit to Canada?”

Note: New question for 2014

Note: Open-ended question – results shown are the coded (grouped) responses)

Around half (51%) of Chinese travellers, who are considering a trip to Canada in the near future, cited the beautiful scenery or landscape as the feature which most excited or intrigued them about their potential trip.

This fits well with what most interests Chinese travellers on vacation, with *seeing beautiful scenery* their top product interest (86%) when the GTW survey was conducted in 2012. Those considering a trip to Canada clearly connect this interest to the opportunities that Canada affords, and may be more familiar with what Canada has to offer in this respect.

Historical or cultural attractions were mentioned by one-in-five (19%), but they were not particularly specific about what those were³². This is also a keen interest among Chinese

³⁰ QT11 – “What intrigues or excites you most about a potential visit to Canada?”

³¹ Asked as an open-ended question, without prompt

³² They did not name specific locations or attractions by name, when asked ‘What intrigued them most’ about the potential visit.

travellers, but only one-in-five were excited or intrigued about what they would find here when they visited.

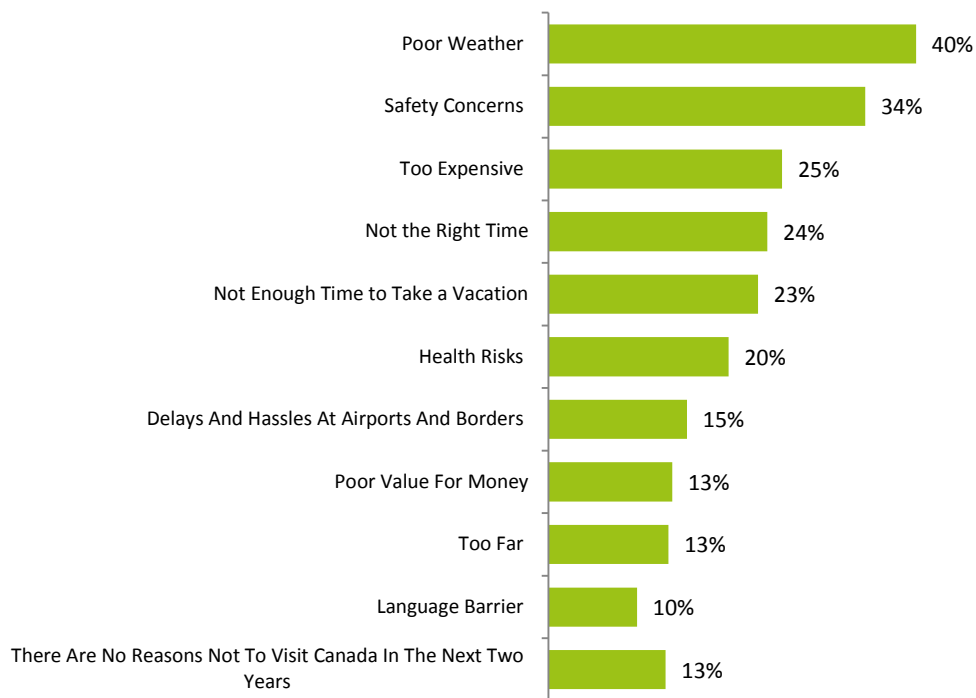
10. Barriers to Visiting Canada

A quarter of Chinese travellers who are considering a trip to Canada, pointed to the cost as a reason they might not actually make the trip, along with concern that *it was not the right time* (24%). However, the main concern was the *poor weather* (40%) followed by *safety concerns* (34%).

Chinese travellers place a great deal of importance on their personal safety when deciding which destinations to visit, with the main concerns being terrorism and the threat of being robbed or assaulted³³.

While the perceptions around the actual level of threat is greatly exaggerated in the mind of the Chinese traveller, they do need to be reassured that they will be safe, and preference for a destination is certainly influenced by their assessment of the security situation.

Exhibit 10-1 Top-ten barriers to visiting Canada, among those *considering a trip to Canada*



Base: Those who are considering a trip to Canada (n = 1,294)

QT13: Which of the following factors might discourage you from visiting Canada?

³³ A study commissioned by Tourism Australia asked Chinese respondents what constituted a 'safe and secure' destination. 32% said a *low chance of terrorism*, followed by 25% who said a *low chance of being robbed or assaulted*.

Perceptions around the weather also serve as a barrier to visitation, with the Chinese favouring much warmer climates. Improved education, particularly about *when* to visit Canada, could help improve these perceptions.

11. Sources of Information on Canada

Source of awareness

TV programs, travel websites and friends or relatives are the channels through which Chinese travellers tend to see or hear about long-haul destinations. Online sources are the most likely, having heard about a destination through a *travel booking website* (47%) or *travel review website* (42%).

Whether in-person (41%), or through social media (39%), friends and family are very often the sources of *awareness* for vacation destinations, but TV programs also pique interest (41%).

The same is also true when it comes to awareness of Canada, but notably *travel guide books* are more prevalent compared to long-haul destinations *as a whole*.

Most influential sources

Friends and family are also the most *influential* source of information and inspiration, whether in-person (86%) or via social media (79%). Paid-for advertising, especially Print or Out-of-home is perceived to be the least effective, with travellers opting for *trusted sources* and recommendations on where to go, rather than sponsored media, promoting a destination.

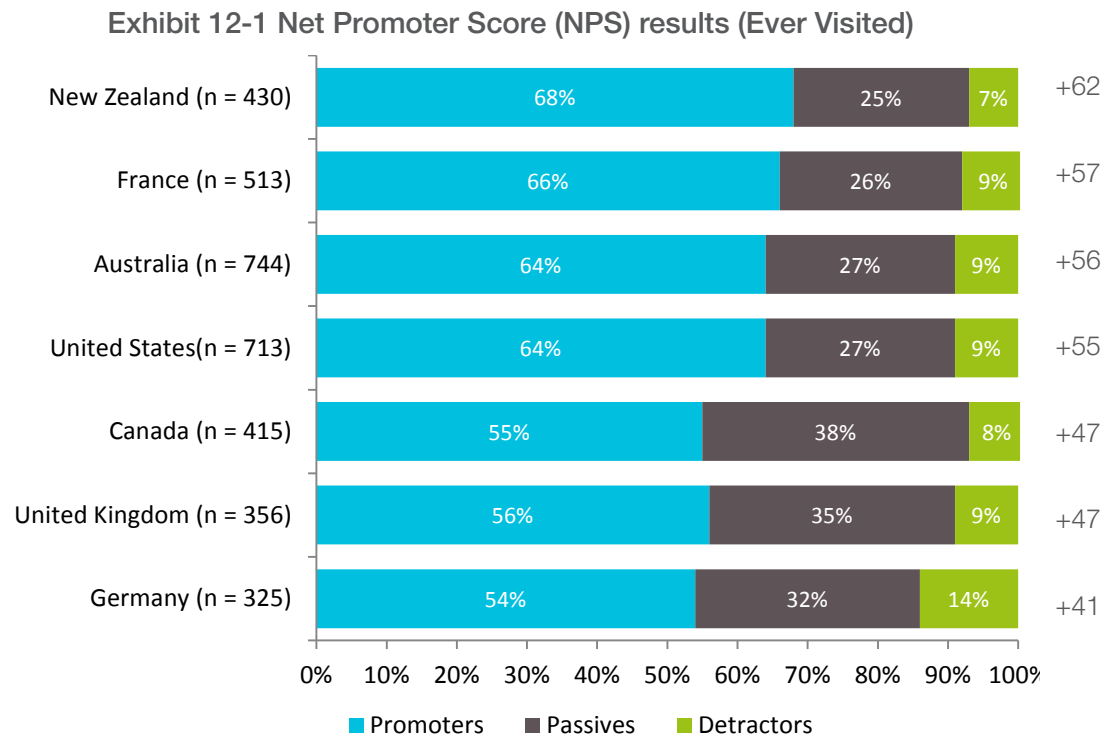
Online articles in magazines and / or newspapers (73%) are also *trusted sources*, and deemed to be independent and unbiased. Chinese travellers are also happy to do their own research, and will often visit *websites dedicated to visitors and tourists* (72%).

Almost two-thirds (62%) agree that TV advertising is influential in their decision on where to go, particularly older travellers.

12. Net Promoter Score (NPS)

The Net Promoter Score (NPS) is an established tool to measure a respondent's likelihood to recommend a product or service to friends and family. Data was gathered among all respondents, but results from past visitors to each destination are the most telling and are presented below in Exhibit 12-1

Of the 415 Chinese travellers who had actually visited Canada in 2014, 55% would recommend it to friends, family and colleagues, while only 8% would not – resulting in an NPS score of +47³⁴.



Q3: Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

Base for each country is filtered to only those respondents who had actually visited *that* country.

Note: Results ranked in descending order according to the overall NPS score.

While more than half (55%) of Chinese visitors to Canada would recommend it to friends and family, with less than one-in-ten (8%) likely to be very critical, Canada falls somewhat short of the level of endorsement given to New Zealand, France, Australia and the US.

Chinese travellers are reluctant to say anything negative about their vacation experience (compared to travellers in other long-haul markets), but understanding why nearly four-out-of-ten (38%) were reluctant to sing the praises of Canada, is somewhat of a concern.

³⁴ That is 55% minus 8% = 47%, or +47 as we report it. Note that negative NPS scores are possible.

Understanding why Canada may not have lived up to their expectations would provide invaluable insight into what more can be done to improve their level of satisfaction, and to promote advocacy.

Exhibit 12-2 NPS scores among those who have visited destination

Destination	2012 GTW		2014 GTW		Change	
	% Promoters	NPS score	% Promoters	NPS score	% Promoters	NPS score
Australia	67%	+59	64%	+56	-3%↓	-3↓
New Zealand	66%	+59	68%	+62	+2%↑	+3↑
US	65%	+58	64%	+55	-1%↓	-3↓
UK	62%	+55	56%	+47	-6%↓	-3↓
Canada	60%	+53	55%	+47	-5%↓	-6↓
France	61%	+51	66%	+57	+5%↑	+6↑
Germany	58%	+48	54%	+41	-4%↓	-7↓

Q3: Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

Base for each country is filtered to only those respondents who had actually visited *that* country.

Older Chinese travellers (55+) are far more likely to recommend Canada (72%) compared to those aged 18 to 34 years (51%), as are those with children (63%), and those on higher incomes.

Exhibit 12-2 shows how the scores have changed since the last time the GTW survey was conducted in China (2012) and reveals that France has made significant gains (+6), and is now second only to New Zealand, while scores for Canada (-6) and Germany (-7) have fallen the most.

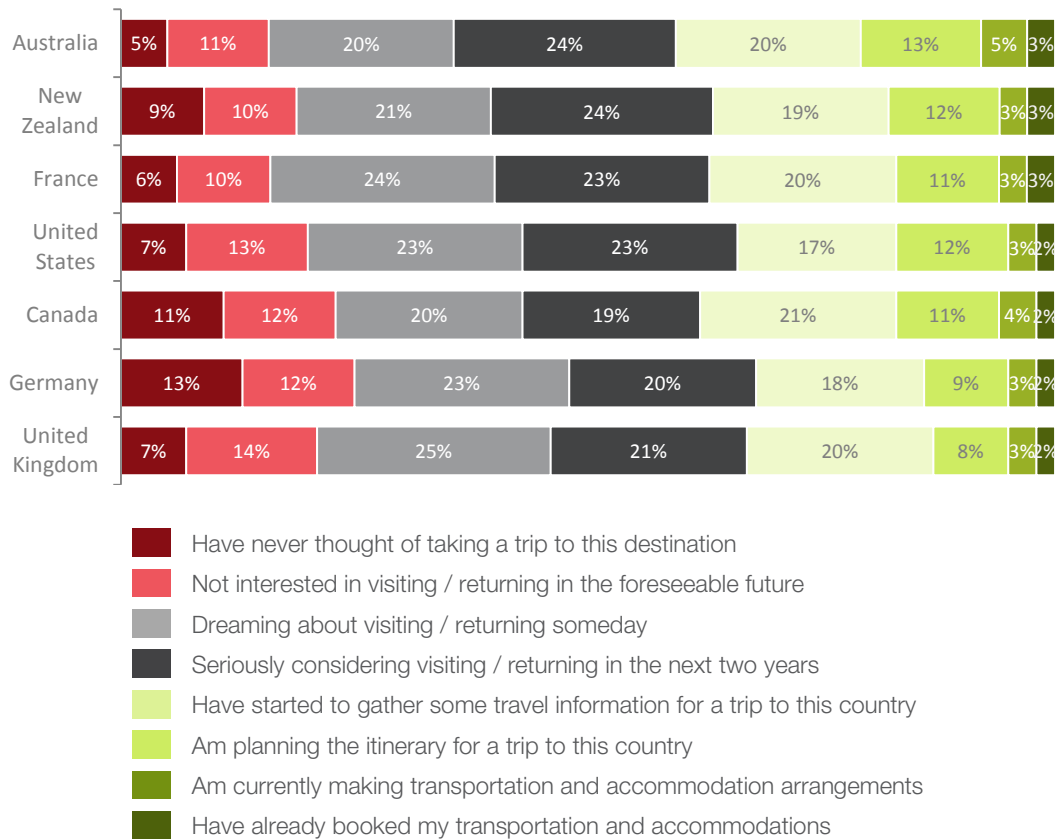
13. Path to purchase

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

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

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

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



Base: Long-haul pleasure travellers (n = 2,199).

Q3: Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

Note: Additional stage on the 'path to purchase model' was added for 2014 – 'Have never thought of taking a trip to this destination'. Results not directly comparable to previous years.

Note: Results ranked in descending order according to the number of travellers who: *are planning the itinerary for their trip, making transportation and / or accommodation arrangements for their trip, or have already booked transportation and accommodations.*

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

Around a fifth (21%) of Chinese travellers are currently at the advanced stages of the path-to-purchase – they are planning their itinerary, making final arrangements or have actually booked their trip. Just less than a fifth (17%) claim to be at the same stage for a potential trip to Canada, or the US (17%), which is encouraging.

The gap across the seven competing destinations is not that significant, with 13% at the advanced stage for the UK – which appears at the bottom of the list.

Almost a quarter (23%) have either never thought about a trip to Canada, or are not interested in visiting / returning in the near future – only Germany has a higher a number (25%).

That said, 19% have never thought / are not interested in visiting New Zealand, despite the fact that 93% of long-haul travellers said they were interested in visiting New Zealand.

The fact that, when considering the last four stages of the path-to-purchase, which includes those *starting to gather travel information*, Canada actually places second only to Australia, is very encouraging.

This enthusiasm, however, is not backed-up by other results from the GTW. Asked which destinations they were *seriously considering* for a trip in the next two years (unaided), only 12% said 'Canada', some way behind the US (25%), Australia (21%) and France (18%), on par with New Zealand (13%).

Sources³⁵:

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³⁵ Sources are documented according to the guidelines described in the fifth edition of the APA's 'Publication manual', a recognized international standard for social and behavioural sciences.