

# THE IMAGE OF EUROPE



## IN NORTH AMERICA

A Report of the Research Group of the European Travel Commission





# THE IMAGE OF EUROPE IN NORTH AMERICA

A Report produced for the Research Group  
of the **European Travel Commission (ETC)**  
by **Menlo Consulting Group, Inc.**

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Appendix I: Consumer Impressions of Europe—Verbatim Responses (Canada)

# I. ABOUT THIS REPORT

This report presents findings from trade and consumer research conducted by Menlo Consulting Group, Inc. (MCG) on behalf of the European Travel Commission (ETC).<sup>1</sup> The purpose of the research was to explore perceptions and images of Europe as a tourist destination in the United States and Canada and to ascertain how best to position Europe in these two important source markets.

Europe has had a long and successful history of attracting American and Canadian visitors. In fact, Europe draws more vacation travelers from North America than do all other long-haul destinations combined.<sup>2</sup> Nevertheless, an assessment of Europe's branding and positioning is timely in light of the recent market volatility stemming from 9/11, the war in Iraq, and economic conditions in the United States and Canada. An assessment of Europe's branding and positioning is also particularly timely in light of the ETC's efforts to develop a new Internet portal in conjunction with the European Union.

Part I of this report contains findings from the trade research, Part II contains findings from the consumer research, and Part III contains Menlo Consulting Group's recommendations based on the findings.

## RESEARCH APPROACH

### TRADE RESEARCH

The trade research consisted of a total of 47 in-depth interviews conducted in October and November 2003 with a cross-section of the North American travel trade: 21 U.S. tour operators, 11 U.S. travel media and other industry representatives, 12 Canadian tour operators, and 3 Canadian travel media and other industry representatives. A roster of interviewees is contained in Appendix B.

The tour operators interviewed represent a mix of mass market and niche operators, offering escorted group, package, and FIT products, and selling Europe either exclusively or in combination with other destinations. Tour operators were selected primarily from the United States Tour Operators Association (USTOA) and Canadian Association of Tour Operators (CATO) membership directories. These companies represent the largest and most prestigious outbound tour operators in North America. Travel media and other respondents interviewed included travel writers and editors specializing in Europe and senior managers from leading travel-

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<sup>1</sup> A list of ETC member organizations is contained in Appendix A.

<sup>2</sup> Menlo Consulting Group, Inc., TravelStyles USA 2003-2004: *Americans as International Travelers*.

related companies doing business in Europe. Media representatives were selected from the membership list of the Society of American Travel Writers (SATW).

All interviews were conducted by Menlo Consulting Group staff. To ensure consistency, a detailed topic guide was employed.<sup>3</sup> Each interview lasted from 30 to 45 minutes. Where applicable, we reviewed respondents' Web sites before calling them to familiarize ourselves with their business and the types of products they offered.

## CONSUMER RESEARCH

The consumer research consisted of nine two-hour focus groups with a total of 84 international pleasure travelers—47 from the United States and 37 from Canada. In the United States, two groups were held in Los Angeles on February 12, 2004, two in New York on February 18, and one in Chicago on February 19. In Los Angeles and New York, one group consisted of past visitors to Europe and the other of non-visitors (that is, persons who had not previously visited Europe). The single Chicago group consisted of non-visitors. In Canada, two groups were held in Toronto on March 2 and two in Montreal on March 3. In each city, one group consisted of past visitors and the other of non-visitors. The Montreal groups were conducted in French.

To qualify for participation in the groups, all candidates had to meet the following criteria:

- Must have been from age 21 to 74.
- Must have been born in the United States (for the U.S. groups) or Canada (for the Canadian groups).
- Must not have been employed in market research, advertising, or the travel industry.
- Must not have participated in a focus group in the past six months.

Additionally, to qualify for the past-visitor groups, candidates:

- Must have taken at least one vacation trip to Europe in the past five years.
- Must have visited at least two European countries for vacation in the past five years.

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<sup>3</sup> A copy of the U.S. topic guide is contained in Appendix C. The Canadian topic guide was essentially the same as the U.S. guide except for questions dealing with political tensions over the war in Iraq.

- Must have said they were “extremely” or “very” likely to take another vacation trip to Europe in the next five years.

And to qualify for the non-visitor groups, candidates:

- Must never have visited Europe for any reason.
- Must have had a valid passport.
- Must have said they were “extremely” or “very” interested in taking a vacation trip to Europe.
- Must have said they were “extremely” or “very” likely to take a vacation trip to Europe in the next five years.

An MCG staff member moderated each of the groups. The moderator followed a detailed topic guide designed to explore the participants’ perceptions of Europe, their attitudes about visiting Europe, their preference for alternative ways of positioning and marketing Europe, and their reactions to selected prototype advertising concepts/images. The guide was developed taking into account findings from the European Tour Operators Association Branding Survey conducted with American and Canadian travelers.<sup>4</sup>

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<sup>4</sup> Findings from the ETOA Branding Survey are contained in Appendix D.



## **PART I: TRADE RESEARCH**



## II. HIGHLIGHTS

### PERCEPTIONS OF EUROPE IN THE UNITED STATES AND CANADA

- ❑ For the most part, members of the U.S. and Canadian travel trade have highly similar perceptions of Europe as a vacation destination. Moreover, their perceptions of Europe tend to be generally positive.
- ❑ Members of the trade strongly associate Europe with history and historical attractions, culture, and gastronomy. They also associate Europe with cultural and ancestral ties, ease of travel, scenic beauty, and a wide array of appealing attractions. Moreover, they are of the opinion that Europe's products and services are of generally high quality.
- ❑ On the downside, Europe is considered to be an expensive destination, especially in Canada. The good news is that it is thought to offer good value despite being expensive.
- ❑ The trade perceives Europe to be a safe destination, although by no means immune to the dangers of terrorism. However, U.S. tour operators say that their clients continue to be hesitant about traveling internationally. On the other hand, Canadian tour operators believe that their clients are not especially apprehensive about venturing outside of Canada.
- ❑ U.S. tour operators also believe that their clients are concerned about being welcomed in Europe as a consequence of political tensions over the war in Iraq. They believe that the problem is confined largely to France and Germany, but that there is some spillover to Europe as a whole. Welcome is not thought to be a concern by the Canadian travel trade.

### MARKETING EUROPE IN THE UNITED STATES AND CANADA

- ❑ Both American and Canadian members of the trade consider Europe's diversity to be one of its primary appeals and believe that the ETC's promotional activities should highlight the diversity of experiences to be had in Europe.
- ❑ Members of the U.S. travel trade are about equally divided on the merits of promoting Europe as a whole; the Canadian trade is somewhat more in favor of the idea. In both the United States and Canada, several members of the trade suggested a two-tiered approach, combining a "Europe as a whole" message with one focused on regions and/or individual countries.

- ❑ When asked to categorize Europe into regions sharing common images, members of both the U.S. and Canadian travel trade readily identify the United Kingdom, Scandinavia, and Eastern Europe. However, they are in less agreement when it comes to categorizing the remaining European countries, offering many different suggestions of how to group them.
- ❑ In promoting Europe, the trade recommends that the ETC focus on the things that make Europe special for Americans and Canadians and that differentiate it from the United States and Canada. First and foremost should be Europe's history and historical attractions.
- ❑ The trade's recommendations for promotional imagery include historical attractions, "lifestyle" scenes, and easily recognizable icons. Most would opt for a collage of imagery rather than a single image.
- ❑ Members of the U.S. travel trade believe that the ETC also needs to address the barriers that are currently keeping Americans from visiting Europe by promoting Europe as a welcoming, affordable, and safe destination. Members of the Canadian travel trade concur with respect to affordability.
- ❑ Most members of the trade believe that the ETC would be well served to target travelers differentially by age. They also suggest segmenting the market by previous experience with Europe and, in the case of Canada, by language.
- ❑ The trade is generally of the opinion that the ETC can effectively mold Europe's image through marketing. However, some members of the trade were quick to point out that shaping Europe's image should not be solely the responsibility of the ETC, but rather should be a joint effort of the ETC and the tourism industry.

### III. PERCEPTIONS OF EUROPE IN THE UNITED STATES

#### TOP-OF-MIND ASSOCIATIONS

We began our interviews with members of the U.S. travel trade<sup>5</sup> by asking respondents an open-ended question: “...what comes to mind when you, personally, think of Europe as a vacation destination for Americans?” As is typical of open-ended questions, their answers were wide-ranging.<sup>6</sup>

- The most common top-of-mind association was with Europe’s history and historical attractions. Nearly half of all respondents used the words *history*, *historic*, or *historical*. They also used words like *ancient*, *old world*, *medieval*, and *long-standing*. Some specifically mentioned historical attractions such as *castles*, *palaces*, *churches*, and *Roman ruins*, while others commented on Europe’s *historical traditions*.
- The second most common top-of-mind association was with *culture*. Nearly as many respondents mentioned culture as mentioned history. Several commented that Europe offers not only a culturally rich experience but also *a diversity of cultures* in close geographic proximity.
- Gastronomy was another common theme. Almost a third of all respondents mentioned gastronomy, commenting on Europe’s *great food*, *good wine*, and *fine dining*.
- Several respondents focused on the fact that Europe offers travelers the opportunity to experience things that cannot be found in the United States. Moreover, several went on to note that Europe is *different, but not too different*—a *comfortable destination* for Americans.
- Finally, several respondents focused on ancestral ties and America’s *shared values and history* with Europe.

Overall, the U.S. travel trade tends to hold positive perceptions of Europe. Some respondents made statements such as *it’s everyone’s favorite destination* and *it has it all*, while others used complimentary adjectives such as *wonderful*, *versatile*, *comfortable*, *charming*, *friendly*, *beautiful*, and *fun*. Only three respondents cited anything negative about Europe; each observed that Europe is *expensive*.

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<sup>5</sup> Because we found responses from U.S. tour operators, members of the travel media, and other U.S. interviewees to be fairly consistent, we will refer to them collectively as the U.S. travel trade throughout this report.

<sup>6</sup> A complete listing of verbatim responses to the question “...what comes to mind when you, personally, think of Europe as a vacation destination for Americans?” is contained in Appendix E.

## INTANGIBLES

After asking members of the U.S. travel trade about their initial impressions of Europe as a vacation destination, we probed further, asking them to comment specifically on a number of factors related to Europe's tourism product, beginning with the "intangible" aspects—cost/value, safety, sense of welcome, ease of travel, and quality of products and services.

### COST/VALUE PROPOSITION

Since the spring of 2002, the dollar has sagged against the euro, devaluing by 20%. Many respondents commented on that fact, stating that Europe is growing increasingly expensive for American travelers. Not one respondent indicated that Europe is an inexpensive or a low-cost destination.

*It is getting expensive. The dollar is weak, and everything costs about 20% more than just a few months ago.*

*Europe is a little expensive right now because of the unfavorable exchange rate. In the off-season, there are really good airfares and terrific hotel deals. In the high season, though, it's becoming quite expensive.*

*The cost of traveling to Europe is not as good as it once was. Overall, the cities are expensive. Europe isn't a bargain unless you go to places like Portugal, Greece, or Turkey.*

Even though Europe is perceived as expensive, a number of U.S. travel trade representatives commented that Europe still offers *good value* for American travelers, in part because of the variety of accommodations available and the efforts by airlines and ground operators to keep travel prices low.

*Americans are looking for value, and they still see that Europe offers value—more so than, let's say, Orlando. In Europe, there is such variety; they can choose where they stay to fit their budget.*

*Right now, Americans are looking for a good value. The pound and the euro are getting stronger. That's a disadvantage. However, the airlines are still doing a good job offering reasonable tickets. That will keep Americans traveling.*

*Americans are very concerned about price right now because of the state of the economy. Recently, air and land prices for Europe have been good. I think that air providers, like us, realize that price is what drives travel. We need to keep prices low to get people to go to Europe. This is especially important because the dollar is not as strong as it once was.*

## SAFETY AND SECURITY

Europe is perceived by the members of the U.S. travel trade as a fairly safe destination for American travelers. However, they recognize that since September 11 and, more recently, the war in Iraq, their customers are somewhat hesitant about travel in general, and that apprehension extends to Europe. This is especially true for group travelers, who tend to be more conservative and safety conscious than independent travelers.

*Europe has a good reputation for safety.*

*Europe is generally perceived as safe. However, Americans have been more apprehensive about traveling in general.*

*Safety has become an issue this year. It is a bit of a question for many Americans. Is it safe to visit Europe?*

*Since 9/11, Americans have been leery about traveling more than two hours from home—that includes Europe.*

*Some Americans still have qualms about Europe's safety. They are worried that something will happen while they are there, and they will be stuck.*

The good news is that members of the travel trade generally feel that Americans are getting over their fear of long-haul travel and that the outlook is brighter for American travel abroad. Moreover, U.S. travel trade respondents feel that Europe will be perceived as safe as long as nothing happens in Europe, or elsewhere, to dislodge that perception.

*Americans have been concerned about world events and about leaving home in general. However, the tide is turning. Americans are becoming more comfortable going abroad—to Europe and elsewhere.*

*It's improving. Americans may have been skeptical about Europe's safety a year ago, but now it's fine.*

*Europe is perceived as fairly safe right now—as long as there is not another catastrophic disaster.*

*I'd say Europe is safe. Not super safe like Canada, but safe. Europe looks good for us next year. However, if a bomb goes off, that's it. No one will go there.*

## SENSE OF WELCOME

Most representatives of the U.S. travel trade perceive Europeans to be friendly and welcoming to Americans. In fact, some feel that Europeans have become even

more welcoming since the Iraq war and the residual drop in tourism. They believe that travel suppliers, too, have become more receptive.

*Europeans are friendly, fun-loving people.*

*Europeans are very friendly. They are thrilled to welcome Americans. The U.S. is the biggest market for tourism to Europe. Now that there are fewer Americans traveling, Europeans would love to welcome us back.*

*Recently we've seen more outreach from our suppliers to maintain good relationships. They have been more solicitous of our business.*

However, U.S. trade representatives recognize a dichotomy between their own perceptions of Europe as a welcoming destination and the perceptions held by American travelers in general. Many believe that their customers are of the opinion that Europe is not currently a welcoming place for Americans. This perception is in great part a result of the political dissension between the United States and France over the war in Iraq—a topic we will discuss in detail later in this section.

*Europeans are very positive to Americans. They are quite welcoming. Some Americans, however, are concerned about a lack of welcome when they get over there.*

*My perception is that Europe is warm and welcoming, but this is not a widespread perception. Many Americans feel that Europeans are not welcoming to them right now.*

*Some Americans feel that Europeans are not as embracing to Americans as they once were.*

*Because of the issues with France, Europe wasn't really perceived as all that welcoming earlier this year.*

## EASE OF TRAVEL

Members of the U.S. travel trade tend to have positive perceptions of Europe's transportation infrastructure. They consider Europe an easy place for Americans to get around in. Europe's subways and its rail network were singled out for particular praise.

*It's very easy to get around Europe. In fact, it's simpler than over here. Within the cities, the subways are clean and fast. They get you to the sites quickly and safely. Getting around the Continent or getting between the U.K. and the Continent is so simple with the EuroStar and the high-speed trains.*

*There are good connections between cities. Trains and regional airlines are particularly effective.*

*Europe is easy to get around. There are wonderful trains. Even when renting a car, it's easy to get around.*

Nevertheless, a few interviewees mentioned the challenges associated with renting a car, commenting that Europe's cities can be difficult places to drive. Some also mentioned that driving on the opposite side of the road can be a challenge in Britain.

*In some cities, like Rome, I think of a place where the driving is just crazy and the red lights are just a suggestion.*

*It's a bit more difficult to get out to the countryside, especially in the U.K., where they drive on the other side of the road.*

*There are some barriers, like in the U.K., you drive on the other side of the road, and maybe automatic cars are not so easily found.*

The trade respondents have mixed perceptions about the ease of getting to Europe, in part because travel times can differ appreciably depending on where travelers live. Nevertheless, most feel that access is not a major problem.

*It's no more difficult to get there than anywhere else in the world.*

*It is close, not as far as Asia, Africa, even Central America, if you live on the East Coast.*

## QUALITY OF PRODUCTS AND SERVICES

When asked to comment on the quality of Europe's products and services, members of the U.S. travel trade had generally positive things to say. They noted that European products and services are of generally high quality, and that the high quality standards apply to Europe's tourism infrastructure as well.

*People perceive Europe's products and services quite favorably.*

*Europe's services are very high quality.*

*You certainly get your money's worth over there.*

*The quality of products and services is excellent, no problems. We work with three- to five-star accommodations, and they are all excellent. Our clients don't want two-star properties, but I'm sure they are fine for their class.*

*There is an assumption that European products and services are superior to those found in the U.S. The cars, the hotels, the restaurants, the travel experiences—all are better.*

However, several respondents noted that Europe's hotels are not up to U.S. standards. They pointed out that first-time visitors are often surprised by the size of European hotel rooms and the quality of European accommodations.

*The quality is good, but some newer travelers don't realize that Europe's hotel rooms are smaller. While here you can get a family of four in one room, in Europe that's not always possible. Also, many of the hotels are in older buildings. Here, everything is so new.*

*Europe's infrastructure is older. This means that rooms are often smaller than Americans are used to.*

*We have to tell first-time visitors that a three-star property in Europe will be very different than a three-star property here.*

## PRODUCTS AND ATTRACTIONS

### DIVERSITY OF ATTRACTIONS

The U.S. travel trade tends to see Europe's diversity as one of its primary appeals. Respondents were quick to comment on the variety of experiences to be found in Europe—both across countries and within countries.

*Europe is very diverse. It offers a broad array of educational experiences and historic cultures.*

*There is so much there. Tours can be based on ancient elements, Christianity, monuments, etc. Its age means it has so much to offer: more architecture, culture, art, food, shopping, sports....*

*Europe offers many different experiences. Some destinations are very old. Others, like Italy, are very fashionable. Switzerland offers outdoors activities. They can go to sporting events, fashion shows....*

*Every country is different. Even within countries, there are so many different regions that offer different things. Think France—there is the south, Paris, the wine region, the chateaux....*

*Americans think of Europe for luxury tours, train trips, Mediterranean cruises, private journeys, inexpensive FIT travel. Europe offers something for everyone.*

The U.S. travel trade believes that Europe not only offers a diversity of experiences, but that it is a place where American travelers can engage in experiences that are different from those found in the United States.

*Americans want to experience something other than what they would find in the United States. They want to see the changing of the guard, visit Notre Dame, and see London's gardens.*

*Americans want the authentic European experience. They want to go to London for the best theater, to Lyon, Switzerland, Italy, or Germany for cooking classes, France for wine tasting....*

*What [Americans] are looking for is differences from America.*

## HISTORY/HISTORICAL ATTRACTIONS

Members of the U.S. travel trade overwhelmingly associate Europe with its historical attractions, frequently citing Europe's architecture, ruins, castles, cathedrals, age-old traditions, and old-world charm as strong draws for American travelers.

*Europe represents history...architecture....*

*Americans want the fantasy element of Europe...the castles on the Rhine, the ancient ceremonies like the changing of the guard.*

*It's everyone's favorite destination. It has castles, cities, architecture, history, Roman ruins. It has it all.*

Europe's historical attractions are especially appealing to American travelers in light of America's comparative newness. Not only are Europe's buildings and monuments much older than America's, its traditions and culture reach much farther into the past.

*Europe has a rich and long-standing history, something that really is not found in the U.S.*

*It's the old-world experience you can't get here...the culture, the architecture.*

*Europe's history...it's getting in touch with something that doesn't exist in the United States.*

## CONTEMPORARY LIFESTYLE AND CULTURE

Generally speaking, the trade believes that Europe possesses a very appealing culture, although culture tends to be an extremely diffuse concept that incorporates the people, their lifestyles, their traditions, their attitudes, and their languages. For many, gastronomy, music, and art are also key elements of Europe's culture. Furthermore, Europe's culture is seen as an amalgamation or collection of many different cultures.

*Americans go to Europe for culture, not leisure.*

*Europe is culture. All of Europe has a definite feeling of culture.*

*Our clients want to be immersed in the local culture, to gain an up close and personal view of Europe and Europeans. They want to experience the villas and castles, and interactions with locals.*

*Our clients go to Europe because they want to live and experience the European lifestyle.*

*Europe's culture is a combination of the contemporary and traditional. It is Coco Chanel and L'Opera.*

*Europe is a bunch of different cultures; each country offers different foods, different people, different history and traditions.*

*It's the fact that every country offers different food, language, and traditions. It's the King and Queen of England, the cheeses and windmills of the Netherlands...it's all so different.*

The U.S. travel trade also perceives Europe's culture as being both *authentic* and *distinct* from American culture.

*Europe's culture is the authenticity of each destination.*

*Everything there is authentic; it's not fake. It's not Disneyland; it's not fake Tudor houses; everything is real.*

*Americans are drawn to Europe to acquaint themselves with a culture that is similar to the U.S. yet that is traditional. They want to experience life like it's portrayed in Under the Tuscan Sun. They want to experience a culture that is deeper than strip malls and McDonald's. They want to experience good food and meet people who have a different way of looking at things, who are more relaxed.*

Several respondents pointed out that Europe's contemporary culture appeals primarily to experienced travelers in search of new experiences and to younger travelers.

*I don't think that Americans really think that much about Europe's contemporary lifestyle, only extraordinary Americans or frequent visitors.*

*Experienced travelers think of off-the-beaten-path activities and experiences. They think more about the "real Europe," or the Europe that Europeans experience.*

*Younger travelers, say those 18 to 34, they want the contemporary Europe, the coffee houses, the nightlife.*

*Younger travelers want to go to parties. They want to know where they can meet people, where they can have fun.*

## CITIES, TOWNS, AND COUNTRYSIDE

Overall, the U.S. travel trade recognizes that Europe offers both sophisticated, culture-laden cities and picturesque countryside and villages. The trade respondents tend to view European cities as vibrant and stimulating destinations with historic

central districts and world-class cultural experiences. They perceive the towns and countryside, on the other hand, as *quaint, charming, and beautiful*.

*Europe has interesting, sophisticated cities.*

*The cities give us the icons: the Eiffel Tower, Big Ben. The cities, I think, represent the hub of culture for the individual countries.*

*In London, it's the shows, the musicals. In Paris and Rome, it's the art...the people.*

*Europe offers beautiful towns and villages.*

*Europe has beautiful countryside and wonderful villages.*

*Places like Italy and driving through the countryside. It really gets under your skin, and you just can't get enough of it.*

Members of the U.S. travel trade say that interest in the large cities is pervasive among all visitors. They indicate, however, that it is repeat visitors—those who have already visited the large cities—who are most interested in getting off the beaten track and seeing more of the smaller towns and countryside.

*Our customers want to visit old city centers. They want to go to the old downtowns of London and Paris and experience all that encompasses.*

*Overall, Americans visit Europe for the larger cities...London, Paris, and Rome. However, previous visitors want something new; they want to branch out.*

*Inexperienced travelers think more about the things they've read about or seen mentioned in the media—they think London, Paris, Rome, places like Big Ben and Notre Dame. Experienced travelers want to visit these places, too, but they've already been there.*

*What Americans think of really depends on whether it is their first trip, or if they are returning. First-time visitors, they think of the major cities—Rome and London. Experienced travelers are more interested in in-depth exploration—getting out to the villages, towns, and countryside.*

*Cities are a draw for the first-time visitor. I think experienced visitors want to get off the beaten path, take the TGV and explore the countryside.*

## THE ARTS

Europe is justifiably famous for being a center of artistic activity and for its world-class museums. Therefore, it is not surprising that the U.S. travel trade perceives Europe's art and museums to be a prime draw for American travelers.

*Europe's art museums are certainly part of the draw for Americans.*

*Americans go to Europe for the culture, for history...to see the museums, the buildings and architecture, and the art.*

*People want to go to the Tate, the Guggenheim...the leading museums of Europe.*

*Educated Americans will go out of their way to visit Europe's great museums.*

Although the performing arts were mentioned less frequently, music and theater—especially London's stage shows—were referenced occasionally during our interviews.

## GASTRONOMY

The U.S. travel trade generally perceives Europe as offering good cuisine and high-quality restaurants. A few countries—notably, France, Italy, and Spain—are singled out for their particular excellence. On the other hand, British fare is perceived to be somewhat lacking, although the perception appears to be changing. The food of the remaining European countries was not specifically mentioned.

*I'd say Europe's food and wine offerings are quite good.*

*Much of Europe is known for its superior meals. Spain, Italy, France—food is truly special there.*

*People expect certain regions to offer excellent cuisine.*

*The U.K. still has problems in this area, but France and Italy, Rome and Florence, they offer a food and wine experience that's unparalleled.*

*European food brings to mind specific perceptions. British food is perceived as not being all that good, even though much of it is quite superior. The French are the legitimate heirs to haute cuisine. Americans are fascinated with Spanish cuisine, and quite surprised that it is not spicy.*

Europe's wine regions and vineyards were cited by some members of the travel trade as being an important part of Europe's image and a draw for their more sophisticated customers.

## SPAS

No respondents mentioned Europe's spas until they were prompted to do so. When specifically asked about spas, interviewees indicated that they were of the opinion that spas would appeal to some travelers but would not be of interest to most American visitors to Europe.

*No. I don't really think of spas when I think of Europe.*

*Spas are not an important reason for Americans visiting Europe.*

*Spas are down the list. They are interesting to some people, but not a draw.*

*The average Joe thinking of Europe isn't interested in spas. They can visit spas anywhere. In Europe, they want to do something unique to Europe.*

*Food, spas, shopping—these are all appealing aspects of Europe, a big part of traveling in Europe, but they are not why Americans are going to Europe.*

## ANCESTRAL TIES

Many Americans feel a cultural affinity for Europe. Several members of the trade noted that America's cultural and historical ties to Europe play an important role in shaping Americans' perceptions of Europe.

*Europe offers great culture and history, shared values and history with the U.S. We have a certain closeness based on our shared history.*

*Europe is really the genesis of our cultural life here in the U.S....Europe's history—it's the historical traditions, the wars in Europe, and the history of Europe. Again, it has had an enormous impact on our own history.*

*Europe is ancient. It has a strong history. It is where so many Americans are from. It represents our ancestry.*

*Americans' history and ancestry. Europe is where you came from. It's relevant to your own history.*

Trade representatives were of a mixed mind regarding the importance of ancestral ties in motivating travel to Europe. Some noted the importance of exploring ancestral ties. Most, however, were of the opinion that ancestral ties play a minor role in motivating the mainstream market.

*There is a sizable minority of Americans who are interested in tracking their ancestry.*

*Absolutely. This is another niche for family travelers.*

*I wouldn't say this is high on the list of reasons why Americans visit Europe. They can do so much research on the Web now.*

## SHOPPING

Members of the U.S. travel trade generally believe that that Europe is a good place to shop. Some commented, however, that shopping in Europe has become less

special. European products have become readily available in the United States at prices comparable to or lower than those found in Europe.

*Great food and shopping....*

*All of Europe is known for good shopping—Florence, Paris, London....*

*Thirty years ago, Europe offered great bargains, like the leather in Florence. Today, though, prices are comparable in the U.S. and Europe.*

*American women may shop when they go to Europe, but for the rest of us, it's cheaper to buy things in the United States.*

Although many members of the trade perceive shopping as something Americans want to do while traveling in Europe, few see it as a primary reason for visiting Europe.

*When in Europe, all Americans want to go shopping, to the little shops and the big department stores.*

*Shopping is something Americans will do while they are in Europe, but not a reason they go there. Maybe for antiques, but for everything else, it's cheaper to buy things in the U.S.*

*Americans want the museums, the history of Europe. Not so much the shopping....*

## CHANGING PERCEPTIONS

We asked respondents if their image of Europe had changed in any way in the past two or three years. Slightly fewer than a third of all respondents said that their image of Europe had not changed in recent years.

*Little has changed over the past few years—nothing unique that hasn't affected every other travel destination.*

*No, my perception of Europe has stayed pretty much the same.*

*The brand and appeal and positioning of Europe has not changed, and that is really the beauty of it.*

More than two-thirds of the travel trade representatives that we interviewed cited negative changes in their perceptions of Europe, reiterating that Europe has become more expensive and less welcoming.

*Europe is a little more expensive than it was. The value of the euro has really affected this.*

*The value proposition of Europe has really changed since 2000, when it was considered inexpensive to visit Europe. The change in the value of the euro means it's more expensive now. The euro has rounded up the cost of everything.*

*For Americans, the image of Europe has changed slightly. People are being pounded with images of a less friendly Europe in the press. They can't help but have a slightly less favorable impression.*

*The recent political issues have changed how Americans perceive Europe. There is really some work that needs to be done to fix Europe's image. The concerns over the politics are still overshadowing Europe's positive attributes.*

*Our feelings about access to it have changed, in that it is no longer a foregone conclusion that we can just hop on a plane and go to Europe. We now have to consider, is the political climate of the destination friendly? Is the government friendly to American policy? Are the people friendly? We have to think about those things as marketers, and we did not necessarily have to think about them a few years ago. There are also new logistical concerns.*

A small number of respondents cited positive changes in their image of Europe, pointing out that Europe has become an easier place in which to travel and that it has become more family friendly.

*With the euro, it's a bit easier to get around. You don't have to change currency.*

*It is easier to get around now than it was before because of the border crossings and the euro.*

*Europe has become more family friendly, although the transition isn't really complete. The hotels and things advertise that they are more family friendly, but then you take the kids to the restaurant and they aren't as welcoming. It is a start but not yet complete.*

## IMPACT OF POLITICAL TENSIONS OVER THE WAR IN IRAQ

Members of the U.S. travel trade strongly believe that Americans' perceptions of Europe have been negatively affected by the political tensions stemming from the American-led invasion of Iraq. They say that not only is Europe perceived as less welcoming to Americans, some Americans are angry with France and Germany for their lack of support.

*Since the Iraqi war, Americans have had misguided feelings towards the French. France and Germany have become the villains of Europe.*

*There is a prejudice to the French and Germans, not because of what the people have done, but because of their governments' decisions. Also, there is a fear of travel to Europe because, in some ways, there is an attitudinal war against us going on.*

*France is not very good right now—it's not perceived as friendly. People are having a negative reaction to France because they didn't stand with us.*

Members of the travel trade say that the problem is confined primarily to France and, to a lesser extent, Germany. However, some believe that there has been spillover—albeit minimal—to the rest of Europe.

*There is a general unhappiness with France. There is a heightened animosity toward the French among Americans. Although Germany took the same stance as France—granted, to a lesser degree—animosity is less towards Germany.*

*The negative feelings are pretty much contained to France.*

*France has been the main country impacted. The French are the loudest. Germany too, but to a lesser degree. All others have suffered as a result, but not nearly as much.*

*A lot of the current negativism is focused on France. But then France is a major component of what Europe is to Americans. Europe is France, the U.K., and Italy.*

*I'd say about 80% of the negativism is centered around France and Germany. However, there has been some spillover; about 20% has influenced the rest of Europe. When Americans hear about negatives in France and Germany so often in the press, they can't help but feel a little badly about all of Europe.*

U.S. trade representatives say that older, less sophisticated travelers are the ones who are most hesitant to travel to Europe.

*Our clients are more ill at ease with France and Germany. They are worried about the anti-war, anti-American sentiment. However, this is less so for sophisticated travelers, more so for the middle-market tourist.*

*France is a problem right now, and it has impacted visitation, especially among our senior travelers.*

*Less sophisticated travelers are the ones most likely to harbor negative feelings about all Europeans. These are the people the Las Vegas hotels are targeting when they remove French wines from their menus.*

Because of the negative feelings held by some Americans, members of the U.S. travel trade have seen their business to France drop or transition to other European destinations during the past year.

*Our French programs are basically dead, with the exception of Normandy. We have travelers saying "I'm not going to spend my money in France."*

*We've really seen our business move away from France towards Spain and Italy in the past year.*

*People are a little more leery about traveling to Paris. We've seen many people shift their travel from Paris to Italy.*

The good news is that members of the travel trade believe that Americans' concerns are already beginning to diminish and that they will continue to do so.

*I think our memories are short, and France will bounce back.*

*There is a certain reticence to go to France, but Americans are getting over that. Americans love to go to Europe. We like to get back to our roots. This won't change, now or in the future.*

*Americans are snobs when it comes to visiting Europe. They want to be able to tell their neighbors that they went to Paris. This means they're willing to overcome the political issues.*

*Concerns over the politics are still overshadowing Europe's positive attributes. This won't be long lasting, but remnants will be around longer than we expect.*



## IV. MARKETING EUROPE IN THE UNITED STATES

### SHOULD EUROPE BE MARKETED AS A WHOLE?

We asked respondents: “In your opinion, does it make sense for the ETC to promote Europe as a whole?” Among the 32 respondents interviewed in the United States, 13 thought that it would be a good idea to promote Europe as a whole, 6 were unsure, and 13 thought that it would be a bad idea.

Those who favored the idea felt that by promoting Europe as a whole, the ETC would be able to stimulate travel to Europe in general.

*Yes. There are plenty of people interested in Europe who just need a bit more encouragement to go there.*

*It would make sense to promote Europe as a whole, especially now that the euro is the dominant currency. Plus, Europe is so compact. You can travel from Germany to Ireland in just two hours.*

*Yes. By promoting Europe, the ETC will get people thinking about travel to Europe. It will be a bug in their ear. Suppose someone has been to Europe; hearing about it more may make them want to go again.*

Others felt that by promoting Europe as a whole, the ETC could provide Americans with a concise overview of the variety of experiences that Europe offers.

*The ETC should absolutely promote Europe as a whole. The American market tends to lump all of Europe together. By promoting Europe as a whole, they can focus on the variety that it offers, the similar experiences that can be had across Europe.*

*By promoting Europe as a whole, it allows consumers to gain a broader understanding of the activities and experiences available to them. Promoting just one country limits their understanding. Plus right now, some countries are still perceived a bit negatively. By promoting Europe as a whole, the ETC can minimize this effect.*

Among those who were unsure whether a “Europe as a whole” approach would work, many thought that it was a good idea, but that it could minimize Europe’s diversity, noting that Europe’s diversity is a major part of its appeal.

*Yes and no. Yes, because by promoting all of Europe, the ETC may develop interest in some of the smaller, less visited countries. No, because Europe is very diverse and each area has its own special qualities.*

*It really depends on the execution. The ETC could do a really good job, or it could backfire. Americans go to Europe to experience the charm of the individual countries, not to experience one generic experience. I think presenting Europe as a whole will be a challenging thing to do without minimizing the unique differences of the individual regions.*

*Yes and no. It couldn't hurt to promote all of Europe to increase awareness, but I think that each of the individual destinations needs to be promoted as well.*

Members of the travel trade who were against the idea of promoting Europe in its entirety were even more concerned about the risk of “homogenizing” Europe, particularly because many felt that Americans’ perceptions of Europe have broadened in recent years.

*I don't think the ETC should group countries together. It stands to reduce their individuality.*

*The European countries are so different. How do you promote the Eastern Bloc countries and the Western countries all at once?*

*Europe is not one country. It is too broad and too diverse to promote as one destination. How do you promote the U.K. with the Continent? They are so different.*

*I wouldn't recommend that the ETC promote Europe as a whole. I don't think that Americans look at Europe the same way they used to. Europe for Americans used to be Western Europe. Today, Americans have different feelings about the countries that make up Western Europe. They feel very differently about England as opposed to France. Additionally, they recognize that there is more to Europe than just a few western countries.*

*No. I wouldn't promote Europe as a whole right now. Americans used to see Europe as a whole, but now they perceive it as offering so many different experiences. It would be a shame to lose that by promoting just Europe.*

Other members of the U.S. trade who were against promoting Europe as a whole were concerned that doing so would not allow the ETC the opportunity to provide the level of detail necessary to motivate Americans to travel to Europe.

*I don't think so. Americans are not geographically adept. We need detail and specifics. People would get confused about which countries the ETC was talking about if they just promoted Europe.*

*Painting a big picture of Europe is just too much. It is likely to turn off many Americans. Europe is just too large a concept for many people. They need more specific information—for example, visit Italy for 10 days at x dollars. Americans are more drawn to tangibles.*

A few members of the U.S. travel trade felt that Americans have changed their travel preferences such that they want to investigate regions or individual countries in

detail when they travel, and the ETC should tailor its marketing approach to address this shift in travel patterns.

*It doesn't make sense to promote Europe as a whole. Americans get just 10 days of vacation. This doesn't give them enough time to see all of Europe.*

When specifically asked to choose whether Europe should be promoted as a whole, as a set of regions sharing common images, or as a collection of individual countries, respondents were almost equally divided among the three options.

Those who were in favor of promoting Europe as a set of regions felt that doing so would help Americans categorize what Europe has to offer, without minimizing the diversity of experiences available.

*By promoting groups of regions, the ETC would help Americans categorize Europe. This would give them specifics about Europe, not vague ideas.*

*The ETC would be very wise to look at what the different regions offer and bundle these together. People are generally looking to visit a specific country, or are looking for a specific type of experience—hilltop villages, English-speaking countries, good food...whatever they are looking for, it can usually be found in a group of countries.*

*People think in terms of regions. It helps them develop a rich comparison between the different areas of Europe. The ETC could really develop a meaningful campaign focused on the commonalities of the different regions—Western Europe, Eastern Europe, etc.*

Those who were in favor of promoting individual countries felt that doing so would help give Americans a more tangible understanding of what Europe has to offer.

*Rather than one overall campaign that promotes Europe as a whole, I would prefer that they get consumers interested in Europe through the destinations that have the highest appeal and then deliver the product with all destinations. For example, lead with Italy, Great Britain, and Spain, and then deliver with all countries. Everyone would benefit from heightened consumer interest in leading destinations in Europe.*

*I would think that they would be better off highlighting the specialty products and specific countries or experiences. Some people "do Europe," but it is really different experiences and countries that get them.*

*People don't go to regions...they say they are going to Italy or to Greece. I think travelers are much more focused now and want to understand individual destinations in more depth.*

Several members of the U.S. trade suggested a two-tiered approach, combining a "Europe as a whole" message with one focused on the regions or individual

countries. However, they felt that promotion of the individual countries should be left to Europe's national tourist offices.

*Promoting Europe as a whole and as a set of countries or regions can work hand in hand. The ETC needs to promote Europe as a safe, attractive destination that offers a diverse array of experiences that are different from the United States, and that is welcoming to Americans. Beyond this, it is the responsibility of the individual tourist boards to promote what their country has to offer.*

*I really think they can do all of the above. They can start at the high level, presenting an overall image of Europe, and then get narrower and narrower, presenting a more detailed view of the individual regions and countries. They should do this with the individual tour offices.*

*I think it would be wise to have a tiered marketing approach, where the top-level message is "see Europe," and then the individual destinations can promote their own messages, such as "see France." I think they should realize that if we can sell more of Europe as a whole, everyone will benefit, and there are opportunities to expand the overall market for Europe.*

*It couldn't hurt to promote all of Europe to increase awareness, but I think that each of the individual destinations needs to be promoted as well. Maybe the ETC could create an ad campaign around a specific theme and then promote what each of the individual countries offers.*

## COMMON THEMES ACROSS EUROPE

By and large, members of the U.S. travel trade feel that there are aspects of Europe that are common to Europe in its entirety. Many believe that the countries of Europe share three common themes: history, culture, and gastronomy. Not surprisingly, these are some of the same characteristics that the trade mentioned as top-of-mind associations with Europe.

Members of the U.S. travel trade noted that all of Europe is old, much older than the United States. Some referred generally to Europe's long history, while others referenced specifics such as traditional architecture and long-standing traditions.

*History...that's really all I can think of that is shared across all of Europe.*

*Old-world experiences.*

*The age of things...the "walk where emperors walked" kind of thing.*

*Traditional architecture and old history.*

*History, the ancient history...the castles of England, the chateaux of France, the Roman ruins....*

*Most European countries share a long-standing history and culture—traditions that go back ages. All of Europe has a great historic tale to tell. In the U.S., our history is only 200 or 250 years old.*

*The age of the place. History. The stuff you can't replicate in the U.S. because it is too young.*

Many mentioned Europe's culture as being a universal element, either alone or in concert with Europe's history.

*Museums and culture.*

*All of Europe has great architecture, a strong history, and a definite feeling of culture.*

*Historical, rich traditions...a cultural heritage.*

*There are a lot of things that unite Europe. The history and culture is strong across the continent.*

*History and culture. Even though each country has a unique culture, there is just so much to draw upon with respect to European culture.*

Many respondents also identified gastronomy as common to all of Europe—not that the food is the same, but that it is universally good.

*Gastronomy—all of Europe has some element of the café lifestyle.*

*There is very good food everywhere.*

Smaller numbers of respondents identified Europe's scenic beauty and its good transportation system as other common elements. Those who mentioned Europe's scenic beauty commented specifically on its *beautiful countryside* and *charming villages*. Those who focused on Europe's transportation system emphasized the ease with which Americans can travel within Europe.

*It's possible to go to five or six countries on a single trip.*

*It's easy to get around all of Europe.*

*Good transportation networks—better than ours, in fact.*

*Efficient transportation that is dominated by trains and cars rather than air travel.*

## REPRESENTATIVE IMAGERY

We also asked respondents: “If you were to choose one photograph to capture the essence of Europe as a whole, what would it be?” Interviewees had a harder time identifying a single photograph that is representative of all of Europe than they did identifying common themes. In fact, a third of U.S. travel trade representatives indicated that they could not identify one single image that would be illustrative of Europe as a whole. Among those who could envision a single picture, many chose a picture they felt showed “quintessential” Europe—a small village street, a scene at an outdoor café, or a small town perched on the bank of one of Europe’s many rivers. Others chose a major landmark that would be familiar to Americans and would evoke an immediate connection to Europe, realizing, however, that it would not be symbolic of all of Europe.

*I’d show a picture with older architecture, something that evokes a European feeling of tradition and history.*

*I’d probably pick a picture of Italy, maybe Portofino or a Tuscan hill town...something that captures the old-world flavor of Europe. Basically, I’d look for an image that plays on the positive images that Americans find most appealing. I’d show a picture that shows the idealized side of Europe, Europe at its very best.*

*Basically, I’d have to recommend picking a stylistic image that gives the feeling of Europe. Maybe people bicycling on a narrow cobblestone street that a car couldn’t fit through. That’s definitely Europe.*

*I would sort of break down the borders with a lifestyle image of a European street or sidewalk scene, such as an outdoor café. Something like that would not be destination specific but would represent the essence of the European lifestyle.*

*I’d probably pick a picture of St. Mark’s square in Venice with people and pigeons, or maybe one of the Eiffel Tower. I’d pick a picture that Americans had seen a million times that evokes a sense of emotion, a desire to visit.*

*I’d probably pick a picture of Stonehenge or the Colosseum in Rome.*

*I’d choose a picture that people associate with Europe...major landmarks like the Eiffel Tower, Big Ben, or maybe something in Italy....*

Several respondents noted that there are a number of French icons (e.g., the Eiffel Tower, the Arc de Triomphe, Notre Dame, and Sacré Coeur) that are evocative of Europe, but that this might not be an appropriate time to use French imagery to represent Europe.

*Paris comes to mind as a very appealing image of Europe, but I wouldn't necessarily promote France as indicative of Europe right now.*

*I guess it would have to be friendly people in generic situation that could be anywhere in Europe. I wouldn't use the main icons due to all the political tensions right now.*

Most members of the U.S. travel trade would prefer to see Europe represented by a series of images. Most respondents suggested choosing an assortment of photographs that incorporate people, icons, experiences, and a balance between the cities, villages, and countryside. A number suggested using happy, welcoming, or traditional-looking people as a core element of the pictures.

*I'd show the four different regions of Europe, and across these, I'd show a variety of experiences...people, buildings, a café, a beach...I'd want to show Europe encapsulated.*

*I'd select pictures of a hilltop village in either France or Italy. If choosing two or three images, I'd add a picture of a vineyard and one of a field filled with flowers—either poppies or lavender.*

*I'd make a collage of pictures of Big Ben, the Eiffel Tower, David in Florence, the gondolas in Venice, the food and wine, the countryside. I'd show people experiencing all of these things, choosing from them. They'd also be relaxing, doing nothing at times.*

*I'd show a picture of an individual or a couple sitting at a sidewalk café. If I were to choose other pictures? I'd add one of the statue of David, something representative of Europe's fine art, and then an easily recognizable icon...something like the Eiffel Tower.*

*I'd have to go with a set of images that showcase Europe's major attractions—the Colosseum, some shots of palaces and their architecture, and some other pictures of countryside and vineyards.*

*If I were to pick two or three, they would probably be an image of the English countryside, the Champs Elysees in Paris, and St. Peter's in Rome. I'd try to show a variety of experiences.*

## THE REGIONS OF EUROPE

After discussing the themes and imagery common to Europe as a whole, we asked representatives of the travel trade to shift their thinking to the regions of Europe. When asked specifically which European countries should logically be grouped together around common images, interviewees offered many different ideas. They easily identified the United Kingdom, Scandinavia, and Eastern Europe as distinct regions; however, when it came to categorizing the remaining European countries, they were in less agreement about the groupings, offering a multitude of permutations.

**The United Kingdom.** Interviewees readily identified the United Kingdom as a region unto itself. It was almost always seen to comprise England, Scotland, Wales, and Ireland. Few respondents differentiated between Northern Ireland and the Republic of Ireland. Overall, members of the U.S. trade tended to perceive the region in a positive light and to associate it with a rich history, ancient castles, lush countryside, and English-speaking citizenry. Members of the trade also find the United Kingdom to be a friendly region closely allied to the United States.

*Shared history and values with the U.S., rich history, beautiful countryside, great monuments...ruined castles.*

*History, countryside, castles.*

*Friendly people; green, lush countryside...castles.*

*Beefeaters, castles, churches, cathedrals, and countryside.*

*English speaking, safe, easy to get around, friendly to Americans.*

*The common language we share.*

*No political issues; we're friends.*

*The fact that we've been allies for a hundred years.*

A smaller number of respondents associated the United Kingdom with its city life and contemporary culture.

*London, Edinburgh, and the gardens.*

*City life, countryside, villages, pubs.*

*Contemporary culture—i.e., London.*

**Scandinavia.** Scandinavia is another fairly obvious region in the eyes of the U.S. travel trade. Although they had more difficulty listing the countries that this region comprises, most believed it should include Denmark, Sweden, Finland, and Norway. Some also mentioned Iceland, Holland, Belgium, and Luxembourg, although references to these countries were relatively infrequent.

The Scandinavian countries are overwhelmingly associated with their beautiful scenery, particularly the fjords and coastline. Unfortunately, some members of the U.S. trade feel that these are the only characteristics that Scandinavia is known for.

*Fjords, beautiful scenery, mountains, and the sea.*

*Great destinations, especially for the outdoors....*

*Fjords...physical beauty....*

*Scenery. People are just going there for the scenery.*

*They need to be known for more than scenery. Right now, they are really known for their scenery, fjords, and being cold.*

A few respondents noted that the Scandinavian countries are neat and orderly, and home to friendly, attractive, and well-educated people. Others, however, focused on the negatives, commenting that Scandinavia tends to be cold and is less accessible than other parts of Europe.

*This is our hardest region to sell. In some ways, maybe it's less well known, less accessible than other parts of Europe.*

*Cold...less accessible than other parts of Europe.*

*It's cold and far away.*

**Eastern Europe.** The trade is also quick to identify Europe's eastern most countries as a distinct region. However, there is a bit of uncertainty about which countries should be included in this region. Many mentioned Austria, the Czech Republic, Poland, Hungary, and Romania; fewer suggested Slovakia, Bulgaria, the Baltic countries, and the Balkans. On multiple occasions, respondents declined to mention specific countries at all, instead referring to the region as *the old Eastern Bloc countries*. Russia was occasionally mentioned as a part of Eastern Europe, although equally often it was categorized as its own region, or not mentioned at all.

Members of the U.S. travel trade readily admitted to knowing little about the Eastern European countries, saying that this is an area with which they are not very familiar.

*I really don't know much about this area.*

*I really don't know. My only impression is from 20 years ago and is really outdated.*

*This is the area in which I'm weakest.*

*Nothing comes to mind at first.*

Many, however, feel that the countries of Eastern Europe are a part of the world that has been previously closed to them and therefore represent an opportunity for discovery.

*It's less familiar to me; therefore, it would offer discovery, a certain freshness.*

*It just opened up. It's been hidden from us for so long.*

*A newness for Americans, somewhere Americans can explore.*

*Growing, blossoming, newness, energy, vibrant, transforming.*

*It's been closed off for so long, maybe an opening up.*

The trade also perceives Eastern Europe to have a wealth of historical attractions and to be less developed than the rest of Europe. It is also perceived to be *inexpensive*.

*Because there wasn't a lot of money for rebuilding in the 60s and 70s, there is still great architecture, some which is very unique.*

*There is no real Eastern Europe anymore, but these countries all have ancient treasures.*

*Eastern Europe is somewhat behind the rest of Europe.*

Members of the trade generally view Russia to be similar to the other Eastern European countries, but as having a unique history.

*Like the rest of Eastern Europe, it's new, different...unknown.*

*What did Churchill say...it's an enigma wrapped in an enigma, wrapped in another enigma... I guess I would have to promote that they have a bit of everything, but you have to dig to find it.*

*Russia has an incredible history. It has a dark soul. Plus, it is a step behind in terms of modernization.*

*Regal, the royal history, the Romanovs.*

**Western/Central Europe.** U.S. travel trade representatives categorized the countries of western and central Europe in many different ways. A few referred to them in total as *Western Europe*. Most, however, thought that the countries should be broken into a variety of smaller regions. Their suggestions included the following:

- *The Heart of Western Europe*, comprising France and Italy, and sometimes grouped with Germany, England, or Spain.
- *Benelux*, commonly identified as Belgium, Luxembourg, and Holland. Some respondents suggested broadening this region to include northern France.
- The *Central* or *Alpine* region, encapsulating Germany, Austria, and Switzerland. Some trade representatives suggested including eastern France and northern Italy in this region.

- *The Rhine Countries* of eastern France and western Germany.

Top-of-mind associations for western and central Europe as a whole included the region's food and wine, as well as its culture and history.

*Wonderful food and wine—gastronomy, interesting cities and nice countryside, historic cultures, architecture.*

*Fine dining and wines, shopping, rich cultural heritage.*

*Food, wine, culinary experiences, culture, museums, architecture.*

*European culture, good food and wine, historical buildings etc.*

References to food and wine were even more common among the respondents who spoke of just France and Italy. These two countries were also the only two to be associated with fashion and shopping.

*Shopping, food, culture, history, icons.*

*Villages, countryside, food, and wine.*

*Food, fashion, culture, and art.*

*Food, wine, culture, history, and religion.*

Common associations with the Alpine region included mountains, outdoor activities, and regional foods such as chocolate, cheese, and beer.

*Beautiful scenery, small villages, history, nature, and culture.*

*The mountains, and the outdoors.*

*Similar to Scandinavia; many activities, scenic, skiing, hiking, lakes.*

*Forests, Zermatt, Alps, children.*

*German language....skiing, cheese.*

*The good life. Beer halls, castles, mountains.*

**The Mediterranean.** The Mediterranean was also frequently identified as a distinct region. Countries seen to belong to this region are Portugal, Spain, the south of France, Italy, Greece, and Turkey and, to a much lesser degree, the Adriatic countries. Some members of the travel trade felt that all of these countries should be grouped together, while others suggested sub groupings, such as Italy joined with

Portugal, Spain, and the south of France, or a grouping of Turkey and Greece. A few respondents were concerned about promoting Turkey in concert with Greece, mainly because of the safety concerns facing Turkey right now.

*I'm not sure about Turkey right now. It might hurt Greece to be associated with Turkey.*

*I would be careful about including Turkey right now.*

Members of the U.S. travel trade readily associated the Mediterranean with its food and wine, warm climate, and, to a somewhat lesser extent, its beaches and relaxed way of life. Comments about the Mediterranean were universally positive.

*The best climate, the best food, the best scenery. How are you going to improve on all that? It's relaxed, enjoyable, vibrant—a great vacation destination.*

*Warm climate, outside activities like walking and hiking, food and wine.*

*Sun and fun; relaxation, yet many activities; peace of mind; good food.*

*Beautiful coastlines, small villages, similar foods, relaxed quality of life.*

*Warm, inviting, wine, food, sunflowers.*

*Food, wine, beaches, boats, sunshine.*

The countries of the Iberian Peninsula are perceived to share characteristics of the Mediterranean region as a whole. Additionally, Spain is widely associated with its Moorish history and ties to North Africa.

*The history with the Moors and the Arabs. Spain is really a stepping-stone between the history of North Africa and the history of Europe. In every town, the architecture is different because of the different historical influences.*

*White villages, olive trees, Moorish influences, art museums, stunning architecture.*

*Food, historic cities, unique experiences such as bullfighting, the contrast between modern and historic.*

Greece and Turkey were also perceived to share the characteristics of the Mediterranean region as a whole but to be particularly rich in historic attractions and scenic beauty.

## WHAT SHOULD THE ETC SAY ABOUT EUROPE?

We asked representatives of the U.S. travel trade “In your opinion, what aspects of Europe should the ETC emphasize in its promotional efforts? In other words, what aspects of Europe are most important in influencing American travelers to visit Europe?”

### PROMOTING THE POSITIVES

It goes without saying that a major focus of the ETC’s promotional efforts should be the promotion of Europe’s many attractions. Indeed, several members of the trade recommended that the ETC highlight the diversity of experiences to be had in Europe.

*It’s important to mention the diversity of Europe because there is no single experience that will appeal enough to everyone.*

*It’s not as important to mention any one single experience—rather, the variety of experiences. In Europe, you can go to beaches and mountains, bars and museums. That depth of experiences is not available in many destinations.*

In promoting specific attractions and experiences, the trade recommended that the ETC focus on the things that make Europe special for Americans and that differentiate it from the United States. For the most part, their recommendations echoed their previously expressed belief that the things that make Europe special are its history, culture, and gastronomy.

*I’d mention the diversity of experiences, but some of the specifics would most definitely be culture and food.*

*They need to focus on what Europe offers that we don’t have in the United States. Architecture, museums, medieval times, Roman history....*

*I guess I’d have to promote the art, the culture, the festivals, the old medieval villages. I’d promote the history from before the U.S. was founded, the things that make Europe different.*

*They should promote the essence of the European experience, the unique culture.*

*The historic culture with some emphasis on the contemporary or modern culture.*

*I think they should promote all of life’s pleasures, whether it be food, wine, the arts, etc.*

*Quintessential Europe resonates with Americans. Food, wine, shopping, spas, museums, history—these are the things that make Europe special.*

Members of the trade believe that some aspects of Europe's tourism product either do not need to be promoted or should be targeted to niche markets.

*There is no need to promote shopping. Americans assume there is good shopping in Europe; they don't need to hear about it to convince them to visit.*

*All Americans expect the quality to be good, so it's not so important to promote this. I know that when I go to Europe, I can find some kind of hotel or lodging that works for me.*

*Spa trips...relaxation trips are very popular right now. So are trips for exploring ancestry. However, these should be marketed to niche markets, not to Americans as a whole.*

*Food, wine, spas...these are becoming an important area for certain niche markets. Shopping too. Yes, everyone is always interested in shopping. These are important, but should be promoted to niches, not to all Americans.*

## COUNTERING BARRIERS

The majority of interviewees were of the opinion that the ETC also needs to address the barriers that are currently keeping Americans from visiting Europe by promoting Europe as a welcoming, affordable, and safe destination.

**Europe is welcoming to Americans.** A third of all respondents saw a need for actively addressing travelers' concerns about being welcomed in Europe. Even though these concerns relate primarily to France, many members of the trade feel that the ETC should communicate that Europe, on the whole, is a friendly destination that welcomes and embraces Americans.

*I would have offered a different answer a few years ago. Today, the ETC should promote Europe's welcoming and inviting atmosphere.*

*Welcoming is a good idea right now—especially for Americans who may not have felt as welcomed in recent months. Something like a “come back” campaign. Focus on the fact that nothing has changed. It's the same wonderful Europe.*

*It is important to let Americans know that Europeans don't blame us for the war in Iraq. Maybe a focus on getting to know each other again.*

**Europe offers good value.** Because Europe has become more expensive for American travelers, the trade feels that promoting value is important. The ETC needs to actively communicate that Americans will still find value when traveling to Europe. They acknowledge that presenting Europe as an inexpensive destination may not be appropriate in today's economic climate. However, they believe showing that Europe offers value for the money will resonate with dollar-conscious Americans.

*With the declining dollar, they need to show Americans that Europe offers value for the money.*

*It's not really a good time to promote value for your money, but that's really the message they need to get across. Since the dollar is down, they need to emphasize what people will get for their money.*

*The dollar has been slammed against the euro. People need to know that Europe can be affordable. Americans don't perceive it as cheap, so it doesn't need to be promoted this way, just as affordable.*

Some members of the travel trade recommended that the ETC demonstrate that Europe is affordable by highlighting low airfares, reasonably priced packages, and creative ways to minimize travel costs.

*Cost is an important element that should be emphasized through online promotions, which are so much more important now than ever before. They should offer good value packages since package travel continues to grow, and each country and region needs to make appropriately priced offers to attract the consumer.*

*By promoting Europe's second cities and its countryside, maybe Americans can save money, making their trip cheaper.*

**Europe is safe and secure.** The U.S. travel trade also believes that the ETC needs to address the matter of safety. However, respondents recognize that this needs to be done in a subtle manner.

*It's most important that the ETC promote Europe as a safe and friendly destination. Americans need to know that they will be safe when traveling there, and that Europeans want them there.*

*Safety and security is an issue. Normally no, but right now, yes. The ETC needs to promote a subtle message of safety.*

*Safety and value. Those are the two hot buttons for Americans right now.*

*I would not promote safety directly but think it should be underlying in the wording and the messaging.*

*You can put safety facts out there, but when you emphasize safety, it almost deemphasizes safety. It can have the reverse of the intended effect. You can't speak to any guarantees with respect to safety. It's not as if Europe is beyond the reach of terrorism or anything.*

## THE SINGLE MOST IMPORTANT MESSAGE

Respondents found it difficult to select the single most important message for the ETC to communicate in the U.S. market. Instead, most agreed that the U.S. market requires a more complex or layered message.

*There is not one single thing that needs to be hammered in. It's a potpourri of things—safety and what makes Europe unique from the U.S.*

*They need to mention that it is safe, and then they should promote that it is interesting, that there is rich history, many cultural experiences.*

*A combined message emphasizing proximity, affordability, ease of access, and the fact that Europeans like Americans.*

## PROMOTING EUROPE TO NICHE MARKETS

### TARGETING DIFFERENT AGE GROUPS

Most members of the U.S. trade agree that the ETC would be well served to promote different aspects of Europe to different segments of the U.S. travel market, specifically to different age groups. However, a few noted that the ETC's first priority should be the creation of a message targeted to all American travelers. Others felt that by focusing on the niche markets, the ETC would simply have too much to do.

*Right now, the ETC should really focus on an overall welcoming message. However, when they decide to focus on segments, then they should promote different things to different ages.*

*Right now, the ETC should focus on the obvious. They need to make Americans feel welcome and show that Europe is a good deal. Once they've done this, they can focus on the segments.*

*It depends how much marketing they do. They could market to so many different segments—by age, by previous visitation, by family type, by occupation. There's just too much to address.*

Nevertheless, the majority of trade respondents strongly believe that different age groups—young travelers, baby boomers, and seniors—want different things from Europe, and therefore should be given different messages.

**Younger travelers.** In the eyes of the travel trade, younger American travelers want a more dynamic European experience, focused on nightclubs, activities, and interactions with other young people. Respondents also noted that younger travelers are inclined to visit multiple countries on a single trip and tend to choose less expensive travel options.

*Younger travelers want food and wine, nightlife.*

*Younger travelers want more nightlife, a more dynamic experience.*

*Teens to those under 30 want to hear about the 24-hour parties, maybe Ibiza or the beaches in Greece.*

*Younger travelers need to know about the big cities, the major destinations, and the energy of Europe.*

*Younger travelers want to visit five or six countries in eight days. They want it all.*

*Younger travelers might want to know about the diversity of Europe—the fact that they can go to many countries and do many things on one trip.*

*Nightlife, shopping, sightseeing, the ease of going to multiple countries, how to make a trip to Europe less expensive.*

*Certain aspects or activities like hiking in the Alps would naturally be more appealing to a younger audience.*

**Baby boomers.** In the estimation of U.S. travel trade representatives, baby boomers are often repeat visitors to Europe and as such want to experience Europe in more depth by getting off the beaten track and experiencing more sophisticated activities. Experiences such as wine tasting, fine dining, and spa visits are perceived as being appealing to this age segment.

*People in their 40s once traveled around Europe by backpack in college. They want to go back and experience it in a more luxurious way.*

*Our travelers are 45 to 60. They are on repeat visits. They want to see the specifics, the things that interest them.*

*Sightseeing to off-the-beaten-track locations. They are likely repeat visitors, so they want something different than the typical Europe.*

*Boomers...they want to know about the niche travel experiences...food, wine, spas....*

*Quality of life—food, wine....*

**Seniors.** According to representatives of the U.S. travel trade, primary concerns of seniors while traveling abroad are safety and ease of travel. For this reason, they require a message emphasizing Europe's convenience, the ease with which they can get around, both within countries and throughout Europe as a whole, and how safe they will be in Europe.

*For older travelers, promote the ease of getting around. Emphasize that everything is close.*

*For seniors, the message should be about convenience. It's easy to get to many different countries and enjoy many different experiences without a lot of effort. Plus, Europe is safe.*

*Promote that Europe is welcoming and that it's easy to get around.*

*For seniors, the message is really about price, convenience, and value.*

## TARGETING OTHER MARKET SEGMENTS

**First-time versus repeat travelers.** Many members of the U.S. travel trade believe the ETC would be well served to customize its message according to whether travelers have been to Europe previously. They believe that previous visitors should be told about Europe's secondary experiences, while first-time visitors should hear a message touting Europe's most notable experiences. The idea that experienced and new visitors want different experiences from Europe was reiterated throughout our discussions with U.S. travel trade representatives, not just in response to our question "Are there any other market segments for which the ETC should emphasize different aspects of Europe?"

*Repeat versus new visitors—they want different things from Europe.*

*For experienced travelers, the ETC should emphasize up and coming regions, secondary places that are outside of the primary tourist destinations, the allure of exploring new areas.*

*For the veteran travelers, you need to bring to light the-off-the-beaten-path experiences that are more authentic to the culture of the destination.*

**Family travelers.** Some members of the U.S. travel trade believe that the family segment is becoming an important one for Europe. As such, they believe that the ETC needs to get across the message that Europe is affordable for family travelers and that it offers experiences and activities that would be enjoyable for parents and children alike.

*Family travel is becoming important. We need to tell families that Europe is in their reach. We also need to tell them what there is to do, tell them about accessibility, and show that they can still see and do a lot in a short time period.*

*Families with children—they need to know about the deals, how they can get there on a budget. They want to know that Europe is family friendly, that they can rent a room for adults and children. They need to know what there is for them to do.*

*Showcase what families can do together on vacation and the opportunities for kid-friendly activities.*

Members of the trade addressed a variety of other segments that they feel are deserving of a unique message. These segments included group travelers, disabled travelers, singles, and gays; however, no more than two respondents mentioned any one of these segments.

## ASPECTS OF EUROPE'S IMAGE THAT NEED TO BE CHANGED

To further probe Europe's image, we asked respondents, "In your opinion, are there any aspects of Europe's image that need to be changed or improved?" By and large, members of the trade had very few initial comments, frequently indicating that *Europe's image is fine as is*. When probed, they tended to reiterate that the ETC should promote Europe as a welcoming destination for Americans and one that is still affordable.

*Europe is less of a value than it once was. This is a problem. The ETC needs to do something to address this.*

*Americans need to know they will be well received. Right now, Americans are still hesitant about going to Europe.*

We specifically probed whether distance, language barriers, and congestion are issues that need to be addressed. As mentioned earlier, some members of the trade believe that the perception that Europe is far away is a problem, whereas others do not.

*The issue of distance has a big impact on tourism. It alters where Americans are traveling in Europe.*

*Europe needs to be positioned as close by. You actually spend less time in the air flying from Boston to London than Boston to San Diego. People don't realize this.*

*Distance may be somewhat of an issue. However, even though it's a long way, Americans are still willing to go. It really doesn't matter if they are traveling from the eastern U.S. or the west. They still want to go.*

*Americans will go to Europe no matter what. Distance is not an issue.*

Few interviewees felt that congestion and language barriers are issues that need to be addressed by the ETC.

*Crowding is really not an issue, nor is language. To be honest, Americans don't even think about language before leaving home; they expect everyone to be able to speak English.*

*The perception right now is that it is less crowded. With the huge drop in Americans visiting Europe, crowding really isn't an issue.*

*Americans have a perception they can get by in Europe. Language really isn't an issue.*

## THE ROLE OF THE ETC

Among those who see a need for improvement in Europe's image, most believe that the ETC can make a difference through marketing. However, some stated that the responsibility is not the ETC's alone; the ETC should be working with its tourism partners to make a difference.

*Sure, Europe's challenges can be addressed through marketing.*

*Yes, Europe's image can be changed through marketing. America's public really plays into the media. The media really impacts how Americans think.*

*Yes. People who have misperceptions can definitely be influenced with one or two well-placed media pieces.*

*Yes, although changing misperceptions is not exclusively the role of the ETC. They should be doing it in concert with their partners...airlines, NTOs, etc.*

*The ETC needs to partner with airlines, hotels, and tour operators to position Europe. They need to paint the big picture, and their partners need to fill in the details—the costs, the tour options....*

When asked specifically what the ETC should do to improve Europe's image, most respondents simply reiterated suggestions made earlier, particularly those positioning Europe as a welcoming, affordable, and safe destination.

*It's the ETC's role to overcome the obstacles and the fears that Americans have about traveling to Europe.*

*The role of the ETC is to educate people on issues and to correct misperceptions. They should help people understand it's easy to get to all parts of Europe, that it is welcoming for Americans, and safe.*

*The ETC needs to engage in a long-term campaign addressing anti-Americanism and distance. It needs to be ongoing, not just a one-time hit, and needs to address both consumers and the trade.*

*Most Europeans speak English. The ETC should promote this. It may make Americans feel more welcome.*

*If they were to do a campaign showing Europe as welcoming, they could then have their partners show tangible examples of how affordable Europe is. That would be effective.*

*They can provide suggested itineraries across more than one country, with details about what it will cost.*

## EUROPE AS A BRAND

At the conclusion of our interviews, we asked members of the travel trade, “By way of summary, what would you say that Europe should stand for as a brand?” Although most U.S. trade representatives feel that the ETC should emphasize a message of welcome, affordability, and safety in its marketing communications, few identified these aspects as central to Europe’s brand. Instead, they mentioned the same top-of-mind associations that arose when we asked them what comes to mind when thinking of Europe as a vacation destination: history, culture, and, to a lesser degree, food, wine, and the diversity of experiences that make Europe what it is.

*As I said before, I think the ETC needs to focus on culture, history, and natural beauty.*

*History, culture, and versatility. There are a wide variety of experiences awaiting the American visitor, all within easy reach.*

*History and culture—the blend of influences, the fascinating history, and the welcoming people.*

*Arts and culture, and the traditions of old Europe. Everything there is authentic; it’s not fake.*

*Europe, a place that has stood the test of time.*

In describing Europe as a brand, many members of the U.S. trade focused less on the specific attractions and more on the feelings or emotions that Europe evokes. Many felt that the ETC would be well served to position Europe as a fantasy vacation destination with a magical feel.

*Europe equals magic. It is something special.*

*Europe—it’s the way life ought to be.*

*Turn dreams into reality. Experience Europe’s culture and lifestyle.*

*Europe is more magical than Disneyland. Europe is such a unique and exciting experience. See it in person. It’s 600 to 800 years old. You can’t find that here.*

*Europe is a vacation wonderland. There is art, history, scenery, and castles....*

*Europe is a journey. It’s a journey through history, through culture, through music, food,....*



## V. PERCEPTIONS OF EUROPE IN CANADA

### TOP-OF-MIND ASSOCIATIONS

As in the United States, we began our interviews with the Canadian travel trade<sup>7</sup> by asking respondents an open-ended question: “...what comes to mind when you, personally, think of Europe as a vacation destination for Canadians?” Again, responses were wide-ranging. A full list of verbatim responses to this question is included in Appendix F.

The most frequently made associations were with culture and history. Nearly two-thirds of Canadian interviewees used the word *culture* or *cultural* in describing their image of Europe. Although many of them mentioned aspects of contemporary culture, references to traditional culture were more frequent. Nearly half used the word *history* or *historical*, and those who described Europe as *historical* also frequently spoke of *old buildings*, *heritage*, *traditions*, and *architecture*.

Cost was the next most frequently mentioned aspect of Europe’s image. The fact that Europe is seen as an expensive destination for Canadians was mentioned without prompting by slightly fewer than half of all respondents.

Gastronomy also plays a role in defining the image that the Canadian trade holds of Europe. Although not mentioned as frequently as culture, history, or cost, *good food* and *gastronomy* were mentioned without prompting by about a quarter of respondents.

When specifically asked to choose adjectives that describe Europe, respondents reiterated the importance of Europe’s history by using words such as *historical*, *old*, and *mature*. They also described Europe as *exciting*, *enriching*, *polished*, and *refined*. For one interviewee, Europe brought to mind the word *passionate*.

### INTANGIBLES

After hearing the Canadian interviewees’ unprompted responses about the image of Europe as a vacation destination, we asked them to comment specifically on a number of factors related to Europe’s tourism product, beginning with the “intangible” aspects—cost/value, safety, sense of welcome, ease of travel, and quality of products and services.

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<sup>7</sup> Because we found responses from Canadian tour operators, members of the travel media, and other Canadian interviewees to be fairly consistent, we will refer to them collectively as the Canadian travel trade throughout this report.

## COST/VALUE PROPOSITION

Europe is seen as an expensive destination for Canadians; two-thirds of Canadian respondents said that Europe is expensive, making high cost the most frequently mentioned association with Europe's image when taking into consideration both prompted and unprompted responses. The perception that Europe is expensive is rooted in the weakness that the Canadian dollar has shown over the past few years against the British pound and the euro.

*Europe is an expensive destination for Canadians, especially the U.K.*

*Expensive...both in terms of getting there and once you are there. Touring around Europe is really expensive.*

*Europe is on the expensive side.*

Members of the Canadian travel trade remarked that the weak Canadian dollar has made selling Europe to Canadians more challenging than before. This said, the situation may be set to change. At the time of this writing, Canada's economy is strong, and the Canadian dollar has strengthened against both the British pound and the euro since the beginning of 2003.

## SAFETY AND SECURITY

In general, representatives of the Canadian travel trade perceive Europe as a safe destination. Furthermore, in contrast to the United States, members of the Canadian travel trade do not believe that Canadians are especially apprehensive about traveling abroad. When asked about their image of Europe as a travel destination, none of the Canadian respondents made reference to the events of September 11 or suggested that Canadians consider long-haul travel to be out of the question because of safety concerns.

*Europe is generally a safe bet. People don't have to worry too much when they travel there.*

*Europe is certainly a safe destination. It is a place that people can travel on their own.*

*Yes, Europe is a safe destination, and people feel safe when they are there.*

*Safety and security is not really a question for Canadians when they think about Europe. You are no more or less safe in Vienna than in Toronto, for instance.*

*Yes, people generally think of Europe as being safe.*

## SENSE OF WELCOME

Respondents had relatively little to say about sense of welcome—even when probed on the topic. For the most part, the trade seems to believe that Canadians feel they will be welcomed and respected when traveling in Europe—as long as they are not mistaken for Americans.

*This is very important, and I think that in general Canadians feel welcomed in Europe.*

*Europe is definitely a place where Canadians get a friendly reception. I mean, a Canadian in the Netherlands gets treated like royalty, because of the history we have with them and Queen Beatrix.*

*Europe is certainly hospitable and welcoming. I think this is because many Canadians go out of the way to differentiate themselves from Americans, and Europeans respond to that.*

## EASE OF TRAVEL

Canadian trade respondents believe that traveling to Europe is neither difficult nor overly time consuming. Even respondents from the west coast see Europe as being accessible and *not that far away*—a reflection of the influence that living in the world’s second largest country has on Canadians’ perception of distance. To put things in perspective, it would take roughly as long to fly across Canada, to drive between Vancouver and Calgary, or to drive from Toronto to Quebec City as it would to fly from most major Canadian cities to the leading European gateways.

*It is only six hours away from Eastern Canada...that is nothing for Canadians.*

*It is only nine hours from British Columbia if you go over the North Pole...it is only really a problem for people taking the cheaper milk-run flights that stop many times before they get to the destination.*

*There is a lot of scheduled lift, especially out of Toronto and Montreal. There are also lots of charters, so getting there is no problem.*

The Canadian trade believes that Europe’s comparatively small size and good infrastructure make it easy for Canadians to travel around Europe. This is an appealing feature of Europe for Canadians, who often like to explore Europe through multi-city or multi-country itineraries.

*Europe is easy to get around.*

*It is easy to visit a bunch of different places in Europe on the same trip.*

*Yes, there is so much to see in a small space, and it is easy to get from one place to another.*

## QUALITY OF PRODUCTS AND SERVICES

The Canadian trade tends to think highly of European products and services. However, a few respondents noted that quality standards are uneven. They also noted that hotels often fall short of the standards that Canadians are accustomed to.

*The service is not consistently strong. It can be great in one place—like a chain of hotels—or really poor in another—such as the snarky hotel employee who leaves a really bad taste in your mouth and is really not helpful or friendly.*

*Good quality, but it is hard to generalize. It is quite good in the west, like in Germany and the U.K., and not so good in the south—like in Italy—and in Eastern Europe.*

*Certainly not of North American standards. The rooms are smaller; the food is different. The differences aren't tangible, but somehow the quality is not the same as in North America.*

## PRODUCTS AND ATTRACTIONS

### DIVERSITY OF ATTRACTIONS

Many Canadian respondents remarked on the diversity of attractions and experiences to be found in Europe. In general, the trade believes that the opportunity to experience a range of cultures is one of the more exciting features of Europe as a destination for Canadians.

*Great variety of destinations in such a small area.*

*Multiple different countries, experiences, and cultures within the same destination. There is really something for everyone in Europe.*

*There are a lot of different cultures, different places, and history.*

### HISTORY/HISTORICAL ATTRACTIONS

Representatives of the Canadian travel trade consider Europe's history to be central to its appeal as a tourist destination for Canadians. In particular, cities and buildings that date back hundreds, and sometimes thousands, of years are captivating for Canadians whose Western history is substantially shorter than Europe's.

*Part of the intrigue is that it isn't new. It is very old. Yet it is still vibrant.*

*Europe is history and culture; there are a lot of monuments that people think of, like the Tour Eiffel.*

*Europe has been there so much longer than Canada.*

## CONTEMPORARY LIFESTYLE AND CULTURE

Members of the Canadian trade also associate Europe with elements of its contemporary culture—such as festivals and cultural events—which they believe are appealing to Canadians.

*I think of summer touring...cultural events, special activities, something that shows how Europe is alive in the summertime.*

*The culture, the traditions, the dancing, the music, and the arts.*

*How Europeans interact and the social scene.*

Canadians generally perceive Europeans to be fashionable, and interviewees pointed to fashion as a defining element of the European cultural experience.

*Europe is cutting-edge, and people are fashionable.*

*The consumer thinks of fashion, the European lifestyle, and cultural diversity.*

*For instance, in Italy they have Versace, Armani, Missoni, Valentino. In the Netherlands, it's the jeans type look. And in Scandinavia, it's the design, which ranges from pottery to jewelry.*

## CITIES, TOWNS, AND COUNTRYSIDE

Few respondents made reference to either small towns or the countryside without being specifically prompted to do so. Cities were more top of mind for the Canadian trade.

*Canadians like the main cities, and this is what they think of and visit first.*

*The consumer really recognizes and contemplates European icons. He is aware of and thinks of Rome, Paris, and London.*

When asked specifically whether they associate Europe with small towns and the countryside, interviewees generally responded in the affirmative.

*Rural Europe is where cuisine and different landscapes and the simplicity of the lifestyle are really appealing. Consumers are interested in this.*

The consensus of opinion was that first-time visitors are more likely to gravitate to the better-known destinations, whereas previous visitors are more likely to consider out-of-the-way destinations, smaller towns, and the countryside.

*I see a mixture of the big and the small...I think people think first of the big towns; and then, if they know Europe better, they also think of the smaller towns and the diversity of the product.*

One respondent pointed out that cost can be a deterrent to visiting small cities and the countryside.

*When Canadians are deciding where to go, they get interested in seeing the smaller towns, undiscovered regions; but then they find out how much it will cost to get there, and they revert to going to the main gateways and surrounding areas.*

## THE ARTS

Most respondents did not mention the arts unless prompted to do so. However, when prompted, they tended to consider the arts an important element of European culture. Classical and modern art, theater, and the cinema were identified as contributing to the European cultural scene.

*By culture, I mean the arts, and the Renaissance, and classical art, and also the modern art and the well-known painters. And also, the cinema and French movies.*

*The theater... belly dancing, Strauss, a Bach recital in Leipzig.*

## GASTRONOMY

When Canadian trade representatives think of Europe, a good many of them think of food—more the quality and diversity of European gastronomy than specific dishes or styles of cooking.

*People go to Western Europe for the restaurants and the culture.*

## SPAS

Spas are not a defining element of Europe's image in the eyes of the Canadian travel trade. They did not come up unprompted, and on the occasions that respondents were prompted, it was reported that spas are not something they would think of as being part of the image of Europe as a vacation destination for most Canadians.

*For North Americans, the spa experience can be summed up in a one-day facial, spa, and pedicure. Of course, this is generalizing everything, but there is only a tiny portion of Canadians who want to spend two weeks in a European spa.*

## ANCESTRAL TIES

Historically, Canada is tightly bound to Britain and France and, to a lesser extent, other countries in Europe. Despite the fact that immigration to Canada from other parts of the world continues to enrich the social fabric of the country, a considerable portion of the population can trace their roots to Europe. As a result, ancestry was mentioned quite frequently in conjunction with the image of Europe in Canada.

*This is a very important draw. There are so many Canadians of European heritage—I think it is something like 95%—and so it is important.*

*Canadians go for the family and ancestry and tracing their roots. Because of this, it is often the first place they go if they have never traveled before.*

*Although Canada has changed, it is still a place where most people can trace their roots back to Europe.*

## SHOPPING

As a result of globalization, Canadian consumers have unprecedented access to products from around the world, both in stores and via the Internet. Perhaps as a result of this increased availability, few members of the trade say shopping comes to mind when they think of Europe as a vacation destination.

*This is something that used to be very true of Europe. People used to go there to get things they couldn't get at home, but now, because of globalization, most things that are available there are also available here.*

## CHANGING PERCEPTIONS

Responses by the Canadian travel trade to the question “Has your image of Europe changed in any way in the past two or three years?” touched most frequently on three aspects—the opening of Eastern Europe, a rise in costs associated with the arrival of the euro, and the homogenization and Americanization of Europe. Each of these changes was mentioned by roughly one-quarter of respondents. Further, only one-quarter of respondents said their image of Europe had not changed in the past few years—indicating that for the majority of interviewees, the image of Europe continues to evolve.

The opening of Eastern Europe has done a lot in the eyes of the Canadian travel trade to diversify and enrich the experiences that Europe offers to Canadian travelers. According to respondents who talked about the *opening of the East*, the fact that this area is now so much easier to reach and explore has played an especially important part in bringing about this change. Further, they mentioned that Eastern Europe is particularly appealing to experienced travelers who are looking for new and different corners of Europe to explore.

*No, other than the opening of the East. Now that travelers can get to the former Eastern Bloc countries, it is as if Europe is bigger. It is easier for people to travel in that part of the world and offers so many more possibilities in a European experience. Especially for the more experienced travelers who are already familiar with a lot of what Europe has to offer.*

*What might be a little newer is the Eastern European countries. There have been major changes in Eastern Europe, and, as a result, it may appeal more to travelers. It is more visible and accessible.*

*Yes, definitely. I mean, take Eastern Europe, for instance. People who are looking for new and different experiences only have to look as far as Eastern Europe. It is a whole new destination. It is possible for people to travel there now.*

Many members of the Canadian travel trade perceive Europe to be more expensive than it was in the past. Many place the blame on the arrival of the euro, which they see as having eliminated the attractive pricing of some traditionally more affordable destinations.

*The euro made many destinations more expensive than they were. I am thinking of Germany, for instance. About six years ago it was much more affordable for Canadians. Traveling there and dining out is more expensive now. Also, for Europe in general, when you think of all the extras like buying souvenirs or taking additional tours of different things.*

*The Canadian dollar has gained against the U.S. dollar, but not the euro. And now, all the countries that used to be so great and cheap, like Italy, are too expensive because of the unified currency.*

Several respondents pointed to increasing homogenization as another way in which Europe's image has changed in recent years.

*Shopping, for instance. Now everything is available everywhere. You used to go to Europe to find things that were hard to find at home.*

*The market supports many brands across Europe that once were only available in some countries, such as brands that you would once only have found in British department stores and grocery stores that are now widely available across Europe.*

Several interviewees noted that Europe has not only become more homogenized, it is also becoming more Americanized.

*Yes, because it has been so Americanized. Now you don't see traditional costumes, and there is a McDonald's on every street corner. The Germans used to criticize the Americans because of the way they would always dress in jeans—but now the Germans are worse than the Americans! Furthermore, you can't turn on a TV in Germany—or in any other country in Europe, for that matter—without finding reruns of American TV.*

*If they are going to sell hamburgers, can't they at least have their own brands? There are Burger Kings and McDonald's everywhere.*

*I think that Europeans are less friendly to North Americans—this is less aimed at Canadians and mostly at Americans—because they feel threatened. They are afraid of a “cultural invasion,” and they want to avoid us taking over their identity.*

## IMPACT OF POLITICAL TENSIONS OVER THE WAR IN IRAQ

Not surprisingly, Canadians were affected quite differently than Americans by the American-led invasion of Iraq. While members of the U.S. trade believe that the war in Iraq has greatly affected the market for American outbound travel to Europe, Canadian trade respondents have seen little change in the Canadian market for Europe. Canadians, whose political stance on the Iraqi war typically aligns more closely with that of the majority of Europeans, are not nearly as preoccupied as their southern neighbors by safety concerns or the effects that the war in Iraq might have on the welcome they will receive abroad.

*Maybe in the west, where they tend to identify with the Americans a little more, this might be the case, but in the east and in Ontario and Quebec I would say the war has had no impact. Canadians are still a little concerned about traveling to some places in the world because of the security issues, but not really because of the political tensions.*

*Some Canadians side with the Americans—maybe this is because of proximity—and some of them with the Europeans. I don’t think that those who are pro-American would boycott Europe as a vacation destination, though. I think they might see it differently somewhat, but this is mostly as a result of the way that the terror attacks have changed the way they look at traveling anywhere.*

*I think Canadians were slightly concerned when the war broke out that there might be some problems in Europe, like a bomb in Frankfurt or something, but that was only temporary.*

*I think Canadians were worried that Europeans might not be able to differentiate them from Americans. Europeans don’t have a problem with Canadians, really, since we were on the same side as France and Germany, and the U.K. barely recognizes anything we do.*

Many members of the travel trade feel strongly that the war in Iraq has had no impact at all on Canadians’ desire to visit Europe, and emphasize that Canadians think quite differently from Americans.

*This is really not relevant. People should realize that Canadians make their own decisions. It has not changed Canadians’ desire to visit Europe at all.*

*No, Canadians have their own view and are not going to be influenced by what Americans think. They base their travel decisions on other factors in isolation to the U.S. political tensions with Europe.*

Perhaps the most significant impact of the war on Iraq is that Canadians are more sensitive than ever about being mistaken for Americans. It is difficult for native English speakers to recognize the difference between an American and a Canadian accent, and it is even more difficult for those whose first language is not English. As a result, members of the trade say that Canadians are going out of their way—even more so than usual—to distinguish themselves from Americans.

*Canadians have always had the problem of differentiating themselves so as not to be mistaken for Americans, and this problem is even greater now.*

*Canadians put maple leaves on their backpacks and do other things to go out of their way to make it known they are not American. When Europeans find out you are Canadian, they treat you like royalty. Canada has always been respected by the Europeans for its peacekeeping efforts and missions abroad, and the fact that it remains neutral.*

## VI. MARKETING EUROPE IN CANADA

### SHOULD EUROPE BE MARKETED AS A WHOLE?

Many in the Canadian travel trade support the idea of promoting Europe as a whole. Of the 15 respondents interviewed in Canada, 11 agreed that it would make sense to do so. Their primary argument in support of marketing Europe as a whole was that Canadian travelers prefer to visit multiple destinations when traveling to Europe.

*I think this is definitely how Europe should be promoted. Really, Europe is not so big. Canadians are willing to drive 300 kilometers to go to the cottage for one night or two,<sup>8</sup> and when they go to Europe, they want to see as much as they can. There is so much to do and see, and this is part of the appeal, and one of the reasons they should promote Europe as a whole.*

*Because there are so many products that encourage people to visit more than one destination, and that is something that Canadians like to do when they travel to Europe. For instance, Eurail passes and bus tours that let you see more than one country on the same trip without too much hassle.*

*That's how Canadians think of it. They want to go to Europe, and visit Italy, France, and the U.K. when they are there. They don't think of one country but a couple of different countries together.*

Several respondents noted that the introduction of the euro and the easing of border restrictions have made it all the easier for Canadians to visit multiple destinations when traveling to Europe.

*There are no more hassles for travelers when crossing borders, no currencies to change, and they can travel seamlessly across borders and through different languages. There are fewer cultural barriers as the countries are unified through the E.U., and there has been a great value of unification. I think it makes sense to highlight Europe in light of the advances that unify the experiences to make a European experience that is diverse and accessible.*

*Europe is accessible, especially now with the euro. Canadians don't have to change currency when they are crossing a border, except in Switzerland and the Scandinavian countries. This makes it so much easier to market it as a whole. It is easier for people to travel around it.*

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<sup>8</sup> Many Canadians have cottages or chalets to which they escape most weekends during the short summer season. These holiday houses are usually located in lake or mountain regions anywhere from one hundred to a few hundred kilometers from major metropolitan cities in Canada.

Two members of the trade qualified their responses, saying that it depended on the audience being targeted. They were of the opinion that marketing Europe as a whole is most suited to targeting Canadians who are unfamiliar with Europe.

*Yes, to the people that don't know about Europe too much or who might not have been there too often. For people who are more experienced with Europe, it makes more sense to promote the customs and traditions of specific countries, and specific experiences that they might be looking for, like the chateaux of France.*

*It depends to whom you are promoting it. A traveler who is going to Europe for the first time is going to think first of Europe, so in this sense, yes. When they have visited a few times, they become more familiar with the product. Then it makes sense to show them that there are different countries and places to be visited.*

Many respondents thought that promoting Europe as a whole would be a good idea, but that it should be done as part of a two-tier marketing strategy—that is, promoting Europe in tandem with individual countries or regions.

*They have to promote Europe and then extol the virtues of various entities such as London or the U.K. or Denmark. You think of Europe and then the destinations, so you need to think of both and promote both.*

*I think there is an umbrella type situation where Europe needs to be promoted and then the offshoots like regional products of hunting and fishing and gastronomy come in. There should be promotion of Europe on the one level and then promotion of the different countries to show the important diversity of the product. Priority should be on Europe as a whole, and based on accessibility and gateways.*

Those against the idea of promoting Europe as a whole tended to believe that by doing so the ETC would fail to capture the breadth of experiences that Europe offers.

When specifically asked “Would you recommend that the ETC promote Europe as a single destination, a set of regions, or a collection of individual countries?” eight respondents said promoting Europe as a whole was most important, and five said it should be promoted primarily as a collection of individual countries. Only two Canadian respondents indicated that promoting the regions should be the ETC’s top priority.

## COMMON THEMES ACROSS EUROPE

When asked “What elements of Europe’s image are common to Europe as a whole?” history and contemporary culture were the two most commonly cited responses. Further, respondents who cited one of these elements tended to cite the

other as well. As a result, it can be surmised that for many in the Canadian travel trade, Europe is a mix of the old and the new.

*It is a very interesting mixture of the old and the new—culture, architecture, fashion and design too—that together appeals strongly and spans across so many different areas.*

Europe's *history* appeals to Canadians in part because of its contrast with the relative newness of Canada.

*Europe is old...it is older than here. I think that is the main thing that makes it different from here....*

*All the things that we don't have in Canada, like the fact that it is so old and you can see things that are hundreds or thousands of years old...real antiquities and historical sites.*

*History—not the same, of course, but all of it is old, and older than Canada. You could do a great museum tour across Europe to really get to see some of the history.*

Members of the travel trade believe that Europe's buildings and monuments—despite spanning many different time periods and styles—share commonalities that allow them to be grouped as “European architecture.” They believe that the architecture in its different forms makes an important contribution to the European look and charm for Canadian travelers.

*Oh, I guess the architecture as well. There is really so much that is different in the architecture, but it is old, and that makes people think of it as being similar.*

*It is the old cities and the architecture that are what it has in common. The old churches, the old museums, the chateaux.*

In discussing *contemporary culture*, members of the Canadian travel trade referred frequently to European social habits and the different pace and priorities that, in their minds, separate the European lifestyle from the North American lifestyle.

*They share a joie de vivre that we don't have in North America. And they dress more elegantly on Sundays. Take a walk in Europe on Sundays and you will notice this—with the exception of Frankfurt, which I consider to be the same as New York.*

*Open-air cafés in the summertime, where people sit around and enjoy a coffee or a beer. They are unhurried, except on the Autobahn, where they drive like maniacs.*

*There is an incredibly social environment in Europe. Europeans socialize almost constantly, and this is a European trait. It can be more easily shared with independent travelers because it is hard to bring a group and introduce them to a natural European social setting that remains*

*authentic. But fly-drive travelers and package travelers definitely can get closer to the social life of Europe, and the social aspects of Europe can be shared with Canadians in this way.*

*Many towns and cities have great summer festivals. The whole town comes out for them. They are really great and typically European. I wish we had those in Canada.*

Good food is another factor that the trade believes is common to Europe as a whole.

*There are lots of different types of food, but people think of Europe and they know there is good food.*

*Not only is there an image of European cuisine—yes, it is different, but at the same time it is the same...Canadians think of it as being higher in quality and different from what they can get here, which is appealing to them.*

## REPRESENTATIVE IMAGERY

As in the U.S. interviews, we also asked respondents “If you were to choose one photograph to capture the essence of Europe, what would it be?” About two-thirds of Canadian respondents were able to imagine a single photograph that would capture the essence of Europe. The most common theme in their choices was one focused on old buildings and “European” architecture.

*A castle...fairytale castles...maybe in Liechtenstein. Something that makes people dream.*

*Old buildings, like chateaux in France. Even if the architecture of different regions and places is different, the old feeling is preserved and communicates Europe to Canadians.*

*It would have rivers, castles, and cathedrals. Yes, all in one photo.*

Respondents who could not condense the essence of Europe into a single image often exclaimed at the intensity of the challenge and said that it is one that they themselves face each year when designing promotional materials.

Most respondents, including those who could not decide on a single photograph to capture the essence of Europe, were able to provide ideas for a series of different photographs. Again, castles, cathedrals, and other forms of traditional architecture figured prominently in these choices, as did outdoor cafés. The trade members believe that both of these subjects are easily recognizable as being European.

*City centers, like in small towns in Germany, where there are cafés outside, and you have the narrow streets and all the old buildings.*

*Ubiquitous outdoor café, in one of Europe's large squares. This would definitely have a very continental feel.*

Several interviewees recommended the use of iconic landmarks, imagery that is easily recognizable even to the least savvy traveler.

*The iconic images...the Colosseum, Big Ben, the Eiffel Tower. Even if they have never been to Europe and aren't too bright, Canadians will recognize these things as being European.*

*The Colosseum, the Eiffel Tower...even though they are icons of specific countries, they convey the message of "Europe." We haven't found anything better.*

*If I had to think of a set of photographs, I think I would make a montage of different images like the Tour Eiffel for France and a corrida for Spain, guards for England, a fountain for Rome, and classical statues for Greece.*

A number of interviewees stressed the importance of including people in whatever photos were chosen, saying that including either locals or visitors in the image would help the reader to become more actively engaged with the picture.

*People are an important element of the photographs, whether Canadians or locals. They speak to the reader.*

*People are very important in promotion. They could be doing some sort of chores or daily activity being done outside in attractive and recognizable scenery. Perhaps people in Tuscany or Provence picking olives or grapes. This would bring together the incredible scenic beauty with the element of food and wine that unites Europe's appeal and image.*

*A social scene. A café, or a bistro, with food—not a cornucopia but an attractive European selection, and definitely some wine. I think maybe a café in Paris or a tapas bar in Madrid. Two handsome people sharing a small table with good food and good drink. And definitely animated communication between them and discussing something. The waiters in the background are wearing long white aprons—and maybe one of them is turning his head to check out an attractive woman walking by! Outside the window of the café you would probably see a small European car parked, such as a Citroën.*

Overall, the images chosen by the Canadian travel trade as being representative of Europe were quite similar to those suggested by their American counterparts.

## THE REGIONS OF EUROPE

Members of the Canadian travel trade offered many different ideas about how Europe should be categorized into regions. Similar to the U.S. travel trade, Canadian respondents easily identified the United Kingdom, Scandinavia, and Eastern Europe

as distinct regions. They divided the remainder of Europe in a variety of different ways, defined primarily by geographic proximity.

**The United Kingdom.** The United Kingdom, or the British Isles, as it was frequently called, was acknowledged as being a collection of countries that could be grouped together for promotional purposes. Respondents typically included England, Scotland, Wales, and Ireland in this region (without differentiating between Northern Ireland and the Republic of Ireland).

Perceptions of the United Kingdom span an eclectic mix of historic and contemporary dimensions. These wide-ranging responses are testament to the breadth of travel experiences that the Canadian trade associates with this region of Europe.

*Historical, in terms of monuments more than history.*

*The tradition of the monarchy, the Queen...The surprising and interesting compilation of Welsh, Scottish, Irish, English cohabitation.*

*Family connection for many Canadians, history, arts, architecture, big cities, exciting nightlife, modern music from the Beatles on, including many rock stars of today.*

*These days, there is really great food to be had, especially in London. It is a shame, people still think of English food as being awful. But there are great restaurants, and this is a really interesting part of it. Other than that, I would say Scotch, horses, rain, and their common history.*

**Scandinavia.** Scandinavia, either with or without Northern European countries such as Holland and Germany, was a regional grouping that came easily to mind for most interviewees. Most Canadian respondents who spoke of Scandinavia made reference to Denmark, Norway, and Sweden. Finland was often included in this region as well, although a few respondents said that they believed Finland should not be grouped with Scandinavia because it is more similar to the Baltic countries. When probed about Iceland, respondents generally felt it should be included in Scandinavia.

Attributes such as the cold, the winter sports, the clean environment, and the outdoors were often cited as reasons for grouping these countries together. These elements make the region easy to compare with Canada—making Scandinavia quite different from many other European destinations, which were often said to offer markedly different experiences from those that can be had at home.

*It is a lot like Canada but with culture. Scandinavia has a squeaky clean image, and it is really safe. The outdoors and outdoor activities make it a big winter destination.*

*Similarities across the region are the cold, the fact that it is expensive, and the Scandinavian culture—like the islands and the saunas. Oh, and drinking is a part of their culture, too. This region is a really tough sell for Canadians, who have enough cold at home and don't want more.*

*They can be grouped because they are places where the weather is cold, the things to see and do are similar, and so are the landscape and the geography.*

**Eastern Europe.** *Eastern Europe* was a term with which respondents were comfortable; roughly half of all respondents named Eastern Europe as a regional grouping the ETC could use in marketing to Canadians. Although the name Eastern Europe came up easily in conversation, respondents were unsure about which countries to include and what they offer. In short, there is a generalized lack of knowledge about the Eastern European countries, their attractions and strengths, and what they would offer as travel destinations for Canadians.

*I admit I lack knowledge about this region, except for the Czech Republic. I also think of the Baltic Sea. And skiing, because don't the Alps go through the Czech Republic and Poland?*

*I really don't know what they share...maybe the history and the architecture?*

Unfortunately, the elements that members of the Canadian travel trade do identify as binding the countries in Eastern Europe together are not overly positive. As an example, although countries in Eastern Europe were cited as *low-cost* destinations, the quality of their infrastructure was seen to be lacking.

*Everything from Poland to Slovakia to the Baltics and Russia is characterized by bad infrastructure. Hungary and Poland are a little better. The region in general is low cost.*

*The lesser-known Eastern European destinations aren't yet ready for the Canadian mass market. They are not as developed in terms of infrastructure, and it is really hard to get there. You have to really want to go, and for that reason much of the travel there is still to visit friends and relatives.*

The Baltics were sometimes identified as a separate region but were rarely mentioned unless probed, and they generally remained grouped with Eastern Europe. Awareness of the Baltic States is low—respondents were not sure which countries are in this region, what they could offer visitors, or where they are located. Some respondents confused the Baltics with the Balkans.

**Western Europe.** Only two respondents used the terms *Western* or *West* to describe a marketing region. Six respondents, however, grouped together various subsets of the following countries: France, Germany, Holland, Italy, Austria, Belgium, and Switzerland. Reasons for grouping them together varied and were based on factors ranging from geography to history to aspects of contemporary culture, such as fashion, design, and food.

*They are the most accessible countries. They are close together, and you can do them easily with a rail pass.*

*I would group them together because of the history, which is more modern than Eastern Europe.*

*They all offer good food, churches, culture, and good transportation.*

*They have fashion, design, and good food.*

*Historical culture, even though they also offer historical monuments. The history and the culture is most interesting with things like the Berlin Wall coming down.*

The Alps were mentioned twice—both times including Germany, Austria, and Switzerland and once including France. Not surprisingly, the reasons for grouping them were based on the mountains and the look of the countryside.

*The countryside, little houses with pointy roofs like in Switzerland, animals and shepherds. In the Alps you can enjoy biking or riding a bike. It is very sports oriented.*

*The Alps are all about the mountains.*

The Benelux countries were also mentioned twice, with respondents citing quite different reasons for grouping them together.

*Good food, like the mussels. Exciting cities, and pot in Amsterdam. Good places for biking and walking if you are out of shape, and ice skating on the canals.*

*What binds this region together? Probably history and geography. History because of the Spanish connection and the cities that sprung up as a result of the industrial revolution.*

**Central Europe.** Six respondents grouped together countries located in the geographic center of Europe—most frequently including Germany, Austria, Switzerland, Poland, the Czech Republic, and Hungary. Music was one of the most frequently cited reasons for grouping these countries. Shared history was also mentioned repeatedly, with references to the Austro-Hungarian Empire and the former Eastern Bloc. Language, food, and architecture also play a role in uniting these countries in the minds of the Canadian travel trade.

*The Austro-Hungarian Empire. These places, including Bavaria, share this in their history. It is reflected in the tradition and the music and the language. Also, the pomp and circumstance. The look of the churches and the houses.*

*I think of music, history, food (like schnitzel, desserts, and beer), and architecture. And also sports—biking in the summer and in the wintertime activities in the Alps.*

*Language, culture, and music. Music, especially for Austria and the Czech Republic. And high culture in these places, too.*

*Primarily language and history...and also, the desserts! From Sachertorte to afternoon coffee. The composers and music come to mind...although I am not aware of any prominent Swiss composers.*

*Architecture is similar, such as in Prague and Berlin—which I also think of as vibrant cities where the food is similar. Also, there are opportunities for religious tourism in these countries.*

**The Mediterranean.** Like their American counterparts, members of the Canadian travel trade envision a region of Europe where a more relaxed way of life reigns. More than half of all respondents referred to a region called *Southern Europe*, the *Mediterranean*, or the *Latin Countries*. Although sometimes limited to include only the countries on the Iberian Peninsula, the southern grouping was typically seen to include Italy, France, Spain, and Portugal. Sometimes Croatia, Greece, Turkey, and even North Africa were included in this region. Interviewees believe these southern countries could be marketed together because they offer good food and wine, friendly people, warm climates, relaxation, beaches, and sunshine, all at a good price.

*They are together because of the weather, warmth, and low cost.*

*Lifestyle, food, and the hedonistic and tactile approach to life. Traditional values are similar, and there are strong similarities in the landscape.*

*The local people bind these places together. They talk a lot—I can say that because I am French! They are really extraverted and animated. Also, this region is known for its great food.*

*Spain and Portugal should definitely work together more often. I would put these countries together because of their proximity to each other, and the fact that it is really a different type of vacation. It is a break from the city tours—not that there aren't great cities, like Barcelona, just that they can do the sun and warmth and beaches.*

Most respondents needed to be prompted about Turkey, either because they did not spontaneously think of it or because they were not quite sure if Turkey is considered part of Europe and is a member of the ETC. As noted above, Turkey was occasionally grouped with other countries in the south of Europe. Just as frequently, however, respondents said that Turkey should be either promoted alone or combined with Eastern Mediterranean destinations such as Greece and Cyprus.

*Turkey is just so different I would not group it with other countries. I mean, we learned at school that it was half in Europe, half in Asia, but it is still sometimes hard to think of it as being part of Europe.*

*I would market Turkey alone because people aren't yet ready to consider it part of Europe. It is colorful and vibrant, with different food and religion.*

## WHAT SHOULD THE ETC SAY ABOUT EUROPE?

As in the United States, we asked representatives of the Canadian travel trade “In your opinion, what aspects of Europe should the ETC emphasize in its promotional efforts? In other words, what aspects of Europe are most important in influencing Canadian travelers to visit Europe?” The trade’s responses most frequently touched on history, ancestral ties, the diversity of the product, and the fact that Europe is different from Canada. Value for the money is another element of the European product that the Canadian trade believes would help motivate Canadians to travel to Europe.

### PROMOTING THE POSITIVES

**History.** Nearly two-thirds of respondents indicated that the ETC should promote Europe’s rich history. They believe that the history is appealing to Canadians, who are awed by the age of Europe’s cities, towns, and buildings. A part of this appeal is rooted in the contrast between the age of Europe and the newness of Canada.

*The first thing is probably history and culture. I mean, Europe is different from North America. That is why people go there.*

*Canada is a young country—I mean here, a 200-year-old house is a big deal. So the history and the tradition of Europe is a big draw for Canadians, because it is so different.*

*The ETC should show Canadians everything that has been so well preserved and how it is something you can't see in Canada...like grand, old buildings and the churches.*

*Canadians are interested in seeing the really old places that are things they really can't see in Canada.*

*History and culture is one of the most important things.*

*Where in Toronto can you see a 1,000-year-old castle?*

**Ancestry.** Slightly more than half of the respondents made reference to the fact that many Canadians can trace their roots to Europe. They believe that the promotion of ancestral ties could motivate Canadians to travel to Europe, even if those ties are many generations old.

*Canada was built on immigration, most of which was from Europe. Even those who are second or third generation and who haven't seen their European homeland are interested. This is the case across Canada, not just in Quebec, where they feel close to France. There are a huge number of British living in Ontario and B.C. And Toronto has the third-largest Italian population outside of Italy.*

*For many people, it is a question of going back to their roots. For some, it might be going home. It depends how long they have been in Canada. But either way, the draw of heritage is important because it is something they can relate to and something that motivates them to travel to Europe.*

*A lot of Canadians moved here from Europe, and now that they have a little more money, they want to go back and explore the countries. They may never have had a chance to do so when they lived there.*

*For many people, there is also an important connection with getting back to their roots. For the Francophones, it is really all about France. For the Anglophones, the roots are diverse and across all of Europe.*

**Diversity.** About half of the respondents mentioned that Europe should be promoted in a way that showcases the diversity of experiences it can offer. The trade mentioned both the diversity of products and the range of different countries and destinations that Canadians can explore.

*There is something for everyone and something to appeal to everyone's interests.*

*For the better-known countries, like France, Germany, and Italy, I would find some sort of quirky theme and show them that there are different things to see there to spark more interest in them.*

*Show Francophones that there is more to Europe than just France and Anglophones that it extends beyond the U.K.*

*I think of the prominent countries like France, Ireland, and Germany, so I would take the less well-known regions like Poland and the Czech Republic and show people that you can find the same things there as in the more prominent destinations.*

**Gastronomy.** As mentioned previously, the Canadian travel trade associates Europe with good food. That said, fewer than one-third of respondents believe that promoting gastronomy would influence Canadians to travel to Europe.

*They know the food is going to be good.*

**Spas.** The trade believes that although Europe has good spas, the Canadian mass market is unlikely to be motivated by them. Nevertheless, a few respondents were of the opinion that spas might be successfully marketed as a niche product. Several

pointed out that there currently is little information on spas available to Canadian travelers.

*Yes, but I would do this for a certain lifestyle segment. You could promote experiences ranging from the lagoons in Iceland to the hot spas in Italy.*

*So many European countries have great spas. They have these great resources, and they are part of the lifestyle and the culture. But they are so hard to find! We should be able to get better information without working so hard. Of course, they appeal more strongly to a higher-end market.*

*This is something they really should promote more so that Canadians can realize that it is affordable and that it is different from the types of spas they find in the U.S. and Canada. Canadians aren't aware of the products, and really Europe has every type of treatment—and they can be reasonably priced. This could be added as a rejuvenating experience after a week of touring Europe.*

## COUNTERING BARRIERS

**Value for the money.** Earlier in this report we mentioned that the Canadian trade respondents perceive Europe to be an *expensive* vacation destination. Not surprisingly, when asked what should be promoted to Canadians, more than half of the respondents reflected on Europe's reputation for being expensive and suggested that the ETC should work to make Canadians see Europe as an affordable destination that is not out of their reach.

*Price is a big concern, so show people realistic costs per day and compare with other destinations to show it is not that expensive. Value is important. So is showing Canadians that what you get for your money is unique and desirable.*

*Canadians are always looking for a bargain. I would target Canadians with price-based deals and promotions.*

*I think price point is important—showing that people can afford it.*

**Ease of travel.** About half of all respondents support the idea of promoting the ease of traveling to and around Europe. Many support promoting this aspect of Europe because it aligns nicely with Canadians' desire for a multi-destination itinerary.

*I would promote the convenience of getting there and also the fact that once you are there it is easy to get around. For this, I would promote the rail passes, especially for France, Austria, and Germany.*

*It is easy for Canadians to forget how close things really are to each other in Europe. I mean, they really can have breakfast in London and then dinner in Paris. I think this is a novelty for Canadians that should be emphasized.*

*For Canadians, Europe is small and convenient to get around. It is not like going to B.C. from Toronto that would take five hours in a plane or three days in a train.*

*It is important that Canadians know how easy it is to get from one place to another because they often like to build itineraries that include more than one country.*

## THE SINGLE MOST IMPORTANT MESSAGE

When asked what they believe to be the single most important draw for Canadians to visit Europe, the message was loud and clear—history, culture, and the fact that Europe is so different from Canada.

*History and the fact that it is older than and different from Canada. I feel like I am repeating myself here, but it really is the history and the culture. Canadians want to go and visit different places and see things that are really different from what they can see in Canada.*

*They should promote the fact that it is different from Canada because it is old.*

*The fact that it is old and different from Canada.*

*The old churches and the old buildings because it is different from Canada.*

*The fact that it is a hands-on holiday that is full of culture and history. They need to promote the experience in a way that someone from Toronto can actually imagine and understand what it would be like to be there.*

## PROMOTING EUROPE TO NICHE MARKETS

### TARGETING DIFFERENT AGE GROUPS

Like respondents in the United States, members of the Canadian travel trade believe that the ETC would be well advised to tailor its marketing efforts to the needs and interests of different age groups.

**Younger travelers.** Interviewees provided a series of suggestions for targeting younger travelers, most of which revolved around four concepts: promoting Europe as fun, affordable, accessible, and social. The trade believes that active, eye-opening experiences that focus on learning about new cultures and meeting and interacting with the locals are very appealing to young Canadians.

*Festivals and special events. Something that is more lively and shows the fun they can have. Germany comes to mind, with the Oktoberfest celebrations. Also, parts of Spain and Portugal that are cheap and cheerful for those who are interested in a beach holiday.*

*Social aspects...young travelers like to experience the social aspects. European youths are so sociable that I don't know if they have any individual time left! This is the result of the universities, and Canadian youths are interested in visiting the old universities and this type of lifestyle. Also, beer drinking in different parts of Europe, the rowdiness of the going-out scene, and bistros, and the cooperative cultures.*

*They are interested in backpacking type experiences that focus on discovery—both of the places and the people. They are interested in cultural exchange. They are trying to find themselves, and so they like to experience a wide range of exciting, different experiences and meet different people. One great product for the young people comes to mind: Zurich in the summertime. There is a great festival in August, and it would really show young Canadians just how different the Swiss are from us in the way they think and interact.*

Canadian respondents believe that cost and possibly a lack of information are the primary factors that limit European travel by young Canadians. They believe that products like rail passes and student discount cards can play an important role in making European travel more accessible for young travelers.

*Ways that make it easier for young people and students to get there at a price they can afford. They need to work with systems like Travel CUTS.<sup>9</sup> Students can't travel off-peak, so it is still expensive for them. Airlines should give them discounted seats. I mean, the seats are there and are going to waste; they should use up the extra room by making it affordable for students.*

*Promote things like rail passes and incentives and the ISIC<sup>10</sup> card. I haven't seen a lot of promotion for these products lately, and I think it is important for younger travelers. Perhaps you should get more properties to offer discounts through products like ISIC and make the card offer greater savings.*

*It really takes a lot of work for them. They need to get a lot of information, and they are new to the market. Give them information that makes it easier to budget and plan. They need options that make it affordable.*

Although not nearly as frequently mentioned as the social interaction and contemporary culture, some respondents specifically suggested promoting physically challenging activities to younger travelers.

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<sup>9</sup> Travel CUTS, known as *Voyages Campus* in Quebec, is a chain of travel agencies focusing primarily on student travel, and located on or near university campuses across Canada.

<sup>10</sup> ISIC is the International Student Identity Card. Holders of an ISIC card receive discounts on a wide range of accommodations, activities, and attractions in countries worldwide.

*Lifestyles, adrenaline, sporting experiences like hiking and biking.*

*Soft adventure experiences like hiking and cycling.*

**Baby boomers.** Because many baby boomers are experienced travelers who have already been to Europe, the trade believes that they are looking for a *certain level of comfort* and *certain standards*—although not at the expense of value for the money.

*Boomers are experiential travelers, and they expect not only value but also a certain level of comfort.*

*Because boomers have traveled a lot on business and are financially better off, they are used to certain standards and want comfort and a certain amount of luxury.*

*Promote experiences in the cities and all, but make it more high-end than what is being promoted to the younger travelers.*

*Appeal to their perceptions of themselves as sophisticated.*

**Seniors.** Representatives of the Canadian and the American travel trade made similar suggestions about what the ETC should highlight in its marketing targeting seniors—both believe that safety and ease of travel are the key elements that should be featured. Also, members of the Canadian trade believe that seniors should be given a lot of information so they know what to expect and don't have to worry about unpleasant surprises.

*Seniors want to travel without the fuss and bother of driving themselves, wondering where they will stay. At that stage they want the details taken care of for them.*

*[Europe] is often the first and also the last place that people travel precisely because it is so easy to get around and in many ways it is so similar to home. They know what to expect in terms of the accommodations, and they won't be without the comforts of home. It is a good destination for the older travelers because they are less adventurous, and this is a comforting destination while still being exotic.*

## TARGETING OTHER MARKET SEGMENTS

**First-time versus repeat travelers.** In the minds of Canadian interviewees, the ETC should court first-time travelers with images and experiences that show them the highlights of many different destinations. They suggest that first-timers also need to be reassured that the experience, while different and *European* in flavor, will not be *scary*.

*First-time travelers are generally looking to see a range of different countries, while frequent travelers are more interested in getting more closely acquainted with one specific country.*

*I would think that when it comes to first-time travelers, it is important to highlight what they are going to see, and to reassure them that it is going to be a comfortable and exciting trip.*

*First-time travelers, I would say they should promote the main cities, like London and Paris, and different tourist experiences, like the changing of the guard.*

Many Canadian travelers have already visited Europe, and enticing them to return should be an important part of the ETC's marketing efforts. When it comes to appealing to these travelers, members of the Canadian trade believe that the ETC would be well served to highlight the diversity of experiences available in Europe, and to make repeat travelers believe that there is still more to be discovered. Some respondents mentioned that the less frequently visited countries of Eastern Europe or the Eastern Mediterranean could appeal to repeat travelers looking for something new and different.

*For more experienced travelers, I think that they should promote different and unusual experiences and destinations that they haven't been to yet. The Baltics and other countries could be particularly successful here...campaigns like "You think you've seen all of Europe? You haven't seen Europe until you've seen\_\_\_\_\_."*

*Many Canadians have already been to Europe, and so for them it is the new experiences that are important. The worst is that many people have been there on a bus and been briefly to many cities and now think they have "done" Europe and they don't need to go back.*

**Family travelers.** When asked what should be promoted to family travelers, respondents emphasized that the most important thing is to make families feel welcome. Another frequent suggestion was to promote Europe as a place with activities the whole family will enjoy. A number of respondents felt that although there is a large and promising market for family travel, some Canadians are afraid that a trip to Europe will not offer a family-friendly environment.

*There is a greater appeal than before for intergenerational travel. For families, you need to emphasize that there is something for everyone and to appeal to them by understanding the lifestyle needs of the different family members.*

*Show family travelers they can do things like the museums in the morning and then they can do other things that are more family oriented. I mean, the kids will get bored of museums after half a day, and this is not something you want them to really think of when they think of family travel to Europe.*

*It is really important to let people know that families are welcome. I mean, you are allowed to take children into museums, so they shouldn't seem exasperated to see them. Often they don't smile, and their attitudes toward kids are not great. They should tell families which restaurants welcome kids.*

**Anglophone and Francophone travelers.** Representatives of the Canadian travel trade found it harder to generalize about how the ETC could cater to the Anglophone market than to the Francophone market. In general, the Francophone market is perceived as being less diverse than the Anglophone market. As a result, comments about the Anglophone market were generally limited to marketing ancestral ties. Respondents were more forthcoming with ideas about how the ETC should address the Francophone market. Two particular aspects came through strongly. The first was promoting the cultural connection to France, which the trade believes is a very powerful motivating factor for Francophone travelers.

*Definitely France and the French-speaking countries. For some reason, French speakers are mostly only comfortable in countries where French is spoken.*

*For them it would be about getting back to their roots and connecting with France and French countries.*

*They have a real affinity to France and somewhat to Italy and Greece. They are less interested in the rest of Europe.*

The other frequently mentioned subject was the importance of communicating in French. These comments addressed the fact that Francophones tend to prefer destinations where they can speak French, and that they also have a strong preference for receiving promotional materials in French.

*They are only comfortable in countries where French is spoken. You see them going on tours and vacations, and when they go to countries where they don't speak French, you see them all staying at the same hotel so they can be sure to be around other French people. Communication in French is really important for Francophone travelers.*

*Francophones in general are less adventurous travelers and are often more concerned about the language barriers. They need reassurance and to be told that they will be able to communicate. I always tell them a smile and little hand gestures go a long way.*

## ASPECTS OF EUROPE'S IMAGE THAT NEED TO BE CHANGED

When asked “In your opinion, are there any aspects of Europe’s image that need to be changed or improved?” cost and quality of service were most frequently mentioned. Some respondents also believe that pickpockets are a concern, or that Europe’s image needs updating and polishing. From the volume of responses that were given to this question, it would appear that Europe’s image may need more revamping in Canada than in the United States, where many respondents indicated *Europe’s image is fine as is*.

**Cost.** Almost two-thirds of respondents said that the ETC needs to rework Europe's reputation so that it is no longer perceived as being so expensive. Respondents often cited the major city centers as being particularly expensive, and some suggested promoting affordable alternatives for meals and accommodations.

*People don't know about the good deals and think only of paying five dollars for a cup of coffee. I think if they knew more about the different options, like the Pensions and the B&Bs, it would be perceived as cheaper and more affordable.*

*Hotels and traveling in the major city centers like London and Paris are ridiculously expensive, and this is having a definite impact on travel patterns.*

**Quality of service.** One-third of respondents cited a need to improve the quality of service offered to travelers. Canadians are used to a high quality of service at home and are taken aback when they encounter poor service abroad. Service is a particularly important asset for any tourist destination because one bad experience can tarnish a traveler's perception of an entire country or region, and stories of unpleasant encounters are often shared with friends and family.

*In Europe, people don't smile in the service industry, and this is something that Canadians are not used to and find it difficult to deal with.*

*People think they will be treated awfully in major cities like Paris, although this is changing gradually.*

*The hotel standards are lacking, and this is one area where Europe's product and image need significant investment.*

**Safety and security.** Approximately one-quarter of Canadian respondents said that Europe's image as a safe destination could be improved. Their comments addressed minor crimes, like pickpocketing, as well as more serious crimes.

*The only negative aspect is really the pickpockets, the mugging, and the gypsies. This scares a lot of people. They get to Notre Dame or St. Peter's Basilica, and they see a sign "beware of thieves," and they are scared. They are serious thieves too. I mean, there are muggings in Europe. And in some places the gypsies and the pickpockets are aggressive and can scare tourists away. This is a deterrent for some Canadians, especially those who are older.*

*Pickpockets...and there has been adverse publicity in Canada about purse snatching.*

*Safety is a concern in certain places. Maybe in France, for instance, because of the large Middle Eastern population. There was a bomb in the metro a few years ago, and maybe people remember that. Also, in England, it was worrisome for a while because it was seen as a target for terrorists because they were supportive of the United States and because of the stance they took on Iraq.*

*Eastern Europe is viewed as unsafe because of the turmoil publicized in the past 10 years. A lot of this is due to a lack of information on Russia, Poland, Hungary, Czech, and the Baltics. How often do you open the travel section and see an “All about the Baltics” feature? If Canadians don’t know it is safe, they are less likely to go.*

**Bring Europe into the present.** Roughly one-quarter of Canadian interviewees mentioned that Europe’s image needs a generalized updating and revamping. In their view, it is difficult for Europe to compete for travelers’ time and money if it is seen as passé.

*I think the fact that so little effort has been made to promote Europe through the media needs to be changed. I think because of this, Europe gets taken for granted—many people think of it as “old-hat.”*

*All they really need to do is smarten it up a little and introduce new experiences that are available today—like Eastern Europe. By promoting new experiences, the image will be richer.*

*Maybe they need to move away from the fact that it is perceived as stuffy and formal. Do a campaign like Newfoundland did to show Canadians all the things they didn’t know about the place. Show that there is more than just churches and focus on the differences to make it more appealing.*

## THE ROLE OF THE ETC

Among those who feel that aspects of Europe’s image need to be changed, most feel that the ETC can make a difference through marketing. Although some in the Canadian travel trade did mention that the ETC should work with tour operators (through co-op marketing, for instance), most comments addressed consumer marketing efforts.

**Promote Europe.** A number of respondents reported that there was insufficient coverage of European destinations in the media. The perception is that the media can be effective in changing Europe’s image among Canadian consumers.

*I think more than putting ads in newspapers or putting information online, they should try and get more mention of Europe on TV and on the radio—like segments that talk about traveling in Europe. Use the press, send them to Europe, so they can share stories and talk about Europe. People remember this more than they do Web pages. It communicates to them more efficiently, and they remember.*

*Yes, I think it is definitely possible to change the image. There should be more effort to get people to write about Europe as a destination in the media.*

*The ETC needs to do more PR to influence Canadians' impressions. By using the media rather than ads, they gain third-party credibility. People remember what they read in a newspaper or magazine article. They should use PR and timing to target different types of travelers, like families in the summer, and spring breakers.*

*The ETC needs to make an effort like they did to promote winter tourism. I think the focus should be on media and advertising.*

**Send a tailored, honest message.** Members of the Canadian travel trade recognize the value of conducting research and believe it is an important first step in marketing to Canadians. They stressed that the message the ETC sends to Canadians must reflect what Canadians want and truthfully convey what Europe offers.

*It is possible for ETC to contribute. They really need to invest in research. Initiatives like this one we are doing here help them understand what Canadians are looking for, and these ideas can then be channeled to the tourism industry in Europe.*

*Yes, but it takes a lot of effort. Whatever message they do communicate to people needs to be true and accurate.*

*I think the most important thing is to play up your strengths. It is important not to lie, but show them that they don't have to spend \$1,500 per night to stay in Paris.*

**Show Canadians that there are affordable alternatives.** Canadian trade respondents believe that the ETC can help improve Europe's image by working to distance it from the word *expensive*. They recognize that the ETC has limited power in actually making Europe less expensive, and suggest instead using promotional efforts to highlight affordable alternatives and to showcase deals when they are available.

*Show them if there are other cheaper accommodations and options that exist. They know that they can do Paris on a budget; show them they can do the same in London—if indeed it is possible.*

*Unfortunately, I don't think the ETC can do anything about the exchange rate. They just have to do a better job of promoting Europe when the exchange rate is favorable and covering up when it is not favorable.*

*Price is important, but this is less something for the ETC to do. Any promotional efforts would help a lot.*

## EUROPE AS A BRAND

At the conclusion of our interviews, we asked the Canadian travel trade “By way of summary, what would you say that Europe should stand for as a brand?” Responses echoed the themes that were addressed in the top-of-mind associations with Europe’s image as a vacation destination for Canadians. Here again, members of the trade spoke most frequently of culture and history.

*I think Europe could focus on exploring the history and traditions of the land.*

*I think the brand would stand for heritage and tradition that has evolved to also have its own modern lifestyle appeal. The “new meets old” approach would work well with them.*

*History, culture, and the people. I mean, that is what you want when you go to Europe. You want to be immersed into the culture of Europe.*

*Symphony of centuries.*

*Something that builds on words like classical, historical, fine, and rich.*

Other respondents felt that the diversity of experiences—cultural, historical, and other—should be the defining element of the brand under which Europe is promoted to Canadians.

*The most extensive portfolio of lifestyle experiences in the world.*

*Europe is a number of attractions in one entity that offers Canadians the opportunity to experience a whole different lifestyle.*

*Everything you would want on a vacation is available in Europe. Also, Europe is a familiar place for Canadians. They run on the parliamentary system like we do. It is comfortable, not completely different like if you were visiting the Orient.*

*The brand would showcase the super and diverse destinations that make up Europe.*

Overall, there is no doubt that those in the trade view Europe as a first-rate vacation destination. Some respondents feel that this fact alone is enough to sell Europe to Canadians.

*Europe is a quality product. It is a place for the discerning traveler. It is the Rolex, not the Timex—the BMW, not the Hyundai.*

*Europe is the freedom to enjoy the finest.*

*Europe is a class act.*



## **PART II: CONSUMER RESEARCH**



## VII. HIGHLIGHTS

### PERCEPTIONS OF EUROPE IN THE UNITED STATES AND CANADA

- ❑ American and Canadian travelers hold fairly similar perceptions of Europe. Moreover, their perceptions are highly consistent with findings from the trade research. The consistency of trade and consumer findings indicates that the trade has an excellent understanding of its clients, which is itself a positive finding.
- ❑ History is the single most compelling feature of Europe in the eyes of American and Canadian travelers. Focus group participants were quick to point out that it is Europe's history more than anything else that differentiates Europe from the United States and Canada.
- ❑ Culture is another defining element of Europe's image in the minds of American and Canadian travelers. However, European culture is a complex concept that means different things to different persons. For most travelers, the performing and fine arts are a core component of European culture.
- ❑ For many travelers, culture also equates with lifestyle. For these travelers, European culture is epitomized by what they perceive to be Europeans' relaxed approach to life, their appreciation of leisure time, their progressive attitudes, and their attention to family values.
- ❑ American and Canadian travelers also strongly associate Europe with gastronomy. Participants in all nine focus groups commented repeatedly on the subject, noting that Europe offers an appealing array of cuisines and dining experiences.
- ❑ In addition to history, culture, and gastronomy, American and Canadian travelers strongly associate Europe with scenic beauty—in its landscapes, small towns and villages, and even its cities. Scenic beauty is one of the few topics on which the trade and consumer findings differ. Members of the trade were somewhat less likely to cite scenic beauty as a top-of-mind association with Europe, perhaps because many European tour products have a predominantly urban focus.
- ❑ American and Canadian travelers consider Europe to be an accessible destination. Moreover, they regard it as an easy place in which to travel because of its highly developed and efficient rail system.

- ❑ Europe also tends to evoke thoughts of well-known icons and landmarks—the Eiffel Tower, Big Ben, the Colosseum, etc.—on the part of American travelers, especially those who have not yet been to Europe. For the most part, however, Canadians do not share Americans’ fascination with icons.
- ❑ In choosing adjectives to describe Europe, focus group participants tended to opt for ones that are positive rather than negative. Their choices centered on history, culture, and gastronomy, but also included terms such as *adventurous*, *artistic*, *charming*, *colorful*, *dynamic*, *elegant*, *liberated*, *quaint*, *romantic*, and *warm*.
- ❑ Focus group participants in both the United States and Canada believed that Europe is an expensive place in which to travel, and that it has become especially expensive in recent months as the euro has continued to appreciate. However, several participants noted that getting to Europe can be relatively inexpensive because of the widespread availability of bargain airfares.
- ❑ Some American focus group participants—particularly those who had not yet been to Europe—were of the opinion that Europeans are not especially fond of Americans. Moreover, concerns about being welcome in Europe are exacerbated by the current political tensions over the war with Iraq.
- ❑ On the other hand, Canadian focus group participants tended to believe that they would be very welcome in Europe. However, they concurred that Americans are less likely to be welcome in Europe and said that they normally go out of their way to distinguish themselves from Americans when traveling in Europe.
- ❑ American and Canadian travelers are also of different minds regarding the safety of travel to Europe. Some American focus group participants—particularly those who had not yet been to Europe—expressed concerns about both the safety of flying to Europe and the safety of traveling within Europe. Canadian focus group participants, on the whole, were less concerned about the safety and security of traveling to and within Europe.
- ❑ Most focus group participants readily admitted to having a very superficial understanding of Europe’s geography, history, politics, and economics—meaning that their perceptions of Europe are not deep-seated and are susceptible to change.

## MOTIVATIONS AND BARRIERS TO VISITING EUROPE

- ❑ There is considerable overlap between travelers’ perceptions of Europe and their motivations for visiting Europe. Americans and Canadians are drawn to

Europe primarily by the opportunity to experience Europe's historical attractions, cultural experiences, and gastronomic pleasures.

- ❑ Many travelers are also motivated by a desire to observe and experience the way that Europeans live. This motivation is particularly strong among Americans who have been to Europe previously, and among Canadians generally.
- ❑ Beyond wanting to experience how Europeans live their lives, travelers are not particularly attracted to contemporary Europe. Focus group participants expressed little interest in visiting Europe solely for its modern elements. Nevertheless, several said that they would be interested in experiencing a combination of the historical and contemporary. In fact, a few said that they were attracted to Europe specifically by the juxtaposition of old and new.
- ❑ Generally speaking, focus group participants were quite positive about Europe's tourism product. Language barriers and safety were the only top-of-mind concerns for Americans. Canadians also expressed concern about language barriers, along with concerns about cost and the time required to take a European vacation. Few participants in either country considered poor service, crime, or crowding as significant reasons for avoiding Europe.
- ❑ Despite terrorism, political tensions, and the strengthening euro, American and Canadian travelers continue to be enthusiastic about visiting Europe. Enthusiasm is particularly strong in Canada, where the vast majority of focus group participants said that their likelihood of visiting Europe today is greater than it was a few years ago.

## MARKETING EUROPE IN THE UNITED STATES AND CANADA

- ❑ Focus group participants in both the United States and Canada said that they would be more likely to respond positively to an advertisement that featured a region or an individual country than to one that featured Europe as a whole. Canadian participants tended to favor the idea of featuring regions, whereas American participants tended to favor featuring individual countries.
- ❑ Focus group participants in both markets were concerned that a "Europe as a whole" message would be too diffuse and would not include enough detail to motivate them to visit Europe or help them plan a trip. Moreover, most said it would not reflect the way they travel. The few focus group participants who favored a "Europe as a whole" approach tended to be first-time visitors to Europe.
- ❑ Focus group participants in both markets tended to perceive Europe as a diverse amalgamation of countries that share few common traits. This

perception contributed to their general lack of enthusiasm for a “Europe as a whole” approach to the promotion of Europe.

- ❑ The question of whether or not to promote Europe as a whole is another area in which the trade and consumer findings differ. The trade was more receptive to a “Europe as a whole” approach. However, the trade tended to approach the issue more broadly than did consumers, citing various marketing advantages to a “Europe as whole” approach—such as stimulating travel to smaller, less-visited countries and highlighting the diversity of experiences to be found in Europe.
- ❑ Focus group participants in both the United States and Canada tended to divide Europe into regions in much the same way as the travel trade did—breaking out the United Kingdom, Scandinavia, Southern Europe, Eastern Europe, and various combinations of the remaining countries.
- ❑ When focus group participants were shown a series of prototype advertising images having a contemporary, cutting-edge tone, their reactions were generally negative. Their opinion was that the advertisements had little to do with the reasons that American and Canadian travelers are drawn to Europe.
- ❑ Focus group participants reacted most positively to the image showing a couple kissing on a small European street. They were favorably disposed to this image because they could easily identify the scene as European and because the setting focused on things that they find appealing about Europe—namely, history and old-world charm.
- ❑ Focus group participants were open to the idea of incorporating contemporary elements in advertising for Europe, as long as the advertising also incorporated traditional elements—an old city center, a historic building, or a quaint café, for example.
- ❑ American focus group participants were particularly drawn to the idea of including famous European landmarks and icons—such as the Eiffel Tower—in the advertising.

## VIII. PERCEPTIONS OF EUROPE AMONG AMERICAN TRAVELERS

### UNPROMPTED PERCEPTIONS OF EUROPE

We began the focus groups by asking participants to write down “What comes to mind when you think of Europe?” Befitting a destination as diverse as Europe, their responses ranged widely. The following are a few examples: *tradition, history, ancient bonds, ancestry, beautiful old architecture, lots of great art, music, culture, beautiful landscapes, mountains, great food and wine, cafés, train travel, waterways, great shopping, fashion, and style.*<sup>11</sup> Although the preponderance of associations were positive, a few participants who had not yet been to Europe wrote down such things as *crazy traffic, language barriers, it’s far away, and they don’t always like Americans.*

In the ensuing discussion, we asked the focus group participants to elaborate on their top-of-mind perceptions of Europe. The three most common themes were history, culture, and gastronomy—the same three dimensions of Europe’s image that were singled out by members of the travel trade.

The majority of focus group participants—both those who had previously been to Europe and those who had not—touched on Europe’s history and historical attractions. Many simply used words such as *historic* or *old world*, while others commented more specifically on *old traditions, old buildings, castles, and ruins*. Relatively few focus group participants made mention of the contemporary aspects of Europe, although several previous visitors to Europe noted that Europe offers an appealing juxtaposition of old and new.

Europe’s cultural attractions also play a central role in defining Europe’s image in the minds of American travelers. Focus group participants were quick to comment on Europe’s *art, music, theater, and museums*. The same is true of gastronomy. Focus group participants repeatedly commented on Europe’s *great food and wine, dining, cafés, and restaurants*, often speaking enthusiastically about favorite dishes and cuisines.

Europe is also strongly associated with scenic beauty. Many focus group participants said that when they think of Europe they tend to think of *attractive scenery and beautiful landscapes*. Some singled out specific areas such as the Alps, Tuscany, and the British Isles as having particularly striking scenery.

Additionally, for many Americans—particularly those who have not been to Europe—Europe also evokes thoughts of well-known icons and landmarks. The Eiffel Tower, Big Ben, the Colosseum, and gondolas were all mentioned frequently by focus group participants.

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<sup>11</sup> Appendix G contains a more extensive listing of participants’ written answers.

## DEPTH OF KNOWLEDGE

Most focus group participants readily admitted to having a very superficial understanding of Europe's geography, history, politics, and economics—meaning that their perceptions of Europe are probably not deep-seated and are susceptible to change. Expectably, those focus group participants who had never been to Europe were the least knowledgeable. However, even among those who had previously visited Europe, knowledge was often sketchy.

*I know stereotypes from the news that I hear. I think I have a stereotypical knowledge of Europe.*

*I just know what I've seen in the movies and documentaries, what I've read about Europe. I really don't know it anywhere near as well as I know my own country.*

When asked specifically whether they could distinguish among the architectural styles of various countries (for example, between those of Holland and Germany), most said no. Similarly, when asked whether they could distinguish between a Finn and a Dane, most admitted that they could not.

*I don't think I could tell the differences between nationalities unless I spent a lot of time there and really got to know them.*

*I feel like I would have to live there to really know it. Quick vacations are not enough to really give you an understanding.*

Most of the focus group participants said that they know some parts of Europe much better than others. Of course, previous visitors have a particularly good knowledge of the places they have visited. Additionally, focus group participants reported having ancestral ties to certain areas, knowing people who had visited there, or seeing media coverage of certain countries or regions.

*My Europe experience includes just certain countries; it is limited to the places I've been.*

*I know a little about Italy because that is where my family comes from.*

In general, focus group participants professed to know more about Western Europe than Eastern or Northern Europe, and to know more about major metropolitan areas than outlying areas.

*There are certain countries that we really don't learn much about growing up here—Finland, for example. We have more common knowledge about the major countries of Western Europe than the Eastern part. For example, I know nothing about Bulgaria.*

## DETAILED PERCEPTIONS OF EUROPE

We continued to explore respondents' perceptions of Europe as a vacation destination, probing a number of dimensions in depth. Specifically, we probed for perceptions related to history, culture, gastronomy, scenic beauty, ancestral ties, cost/value, quality of services, sense of welcome, and safety.

For the most part, travelers' perceptions were consistent with those shared by the trade, demonstrating that members of the trade have a good understanding of their customers. We also found that although non-visitors were less knowledgeable about Europe, their perceptions were fairly consistent with the perceptions of those who had already visited, indicating that Europe has a very well defined image in the U.S. market. Notable differences between past visitors and non-visitors arose only during our discussions of cost/value, sense of welcome, and safety. Similarly, with few exceptions, perceptions did not differ appreciably by respondents' age or city of origin.

### HISTORY/HISTORICAL ATTRACTIONS

As the trade research indicated—and the focus group participants' unprompted responses confirmed—history plays a central role in Americans' image of Europe as a vacation destination. When probed further on the subject, the focus group participants reiterated the importance of history and historical attractions in motivating them to visit Europe. They were quick to point out that it is Europe's historical attractions more than anything else that differentiate Europe from the United States.

*Europe has been around for centuries and centuries and centuries.*

*I think you can see things that go back thousands of years more readily than you can here. There is really a feeling about where we all come from.*

*Europe is all about the things we don't have here—history, ruins, the Colosseum.*

*The travel shows show that Europe's houses are 800, 900 years old and I think, "wow." It's just mind-boggling how things like churches are so old. I think it would be extremely interesting.*

*If it was all new I wouldn't go. I love history. To actually see buildings that were built 2,000 years ago, that's amazing. That's Europe.*

It is noteworthy that several focus group respondents professed to be more familiar with historical Europe than with contemporary Europe.

*I know a lot more about historical Europe than Europe today.*

*The only thing I know about contemporary Europe is from people who have been there, but that is very limited.*

## CULTURE

Americans also closely associate Europe with culture. However, European culture means many different things to Americans. For most travelers, the performing and fine arts—the symphony, opera, theater, and Europe’s abundance of world-renowned museums—are a core component of European culture.

*When I think of culture, I think of Europe’s museums, the history of each country, the art. I love to go the museums—the Uffizi in Florence, the Prado, the Louvre.*

*I think of all the museums and the art...all the great musical composers. My wife wants to take a trip to Europe to just follow Mozart’s life.*

*I think of Vienna and my favorite composer—Gustav Mahler. He lived and worked there. I also think of Freud and visiting where he lived.*

*Whenever we go to London, we always go to the theater there. And we always experience a musical event—a symphony or opera. It is so abundant there and relatively inexpensive.*

For many travelers, culture also equates with lifestyle. To many Americans, European culture is epitomized by Europeans’ unhurried approach to life. In discussing European culture, a number of focus group participants commented on Europeans’ tendency to shop for groceries once a day rather than once a week and their tendency to take leisurely two-hour lunches and eat a late dinner.

*The way they eat, their rituals, the way they talk to each other. That’s what makes up the European culture.*

*Culture is how they eat: a cup of hot chocolate in the morning, a light lunch, tea in the afternoon, and then dinner at 10 p.m. They have a different time schedule. They are more laid back. That’s the unique aspect of Europe.*

*When I think of culture, I think of France. I’ve seen pictures of someone walking down the street, getting on the bus, carrying a loaf of bread under their arm and a cup of coffee in their hand. As far as their culture is concerned, we’re not quite as laid back as they are. The way they dress, the way they handle themselves. They are a little more relaxed.*

*In Italy, they have lunch for a few hours in the afternoon and then don’t eat until 9 or 10 at night. That’s very European. They are very laid back. Everything is closed for a few hours. We’re so very rushed.*

For some Americans, European values—the approach to family life, environmentalism, and a certain liberal perspective—are also defining elements of European culture.

*They are very family oriented. They want to spend time with their children. They get a year's maternity leave, while we only get a few weeks.*

*They are much more family oriented than we are. It is not unusual to have three generations living together.*

*Their cars are little; their refrigerators are smaller. There is more focus on conservation.*

*The people are so much more liberal than over here. I feel more adult in Europe. When I watch TV and look at ads, there is not the conservatism that envelops us. I feel more liberated there. It's not big deal to see a woman's breast. Their attitudes are just so much more adult.*

The focus group participants were quick to recognize that Europe is made up of a collection of diverse cultures. A number of them commented on the complexity of Europe's cultural landscape.

*There are so many different cultures right next to each other, and there are even multiple cultures in different regions within a single country. There are different foods, different ways of doing things, different dialects, all in one country.*

## GASTRONOMY

American travelers strongly associate Europe with good food and wine. Most focus group participants spoke enthusiastically of the major cuisines of Western Europe—French wine and cheese, Italian pasta, Portuguese stew, Swiss cheese and chocolate, and German sausage and beer. English food, however, continues to be stereotyped as bland and unappealing by most American travelers. Interestingly, few group participants commented on the cuisines of Eastern Europe and Northern Europe when describing the foods that most appeal to them.

*I think cuisine is the highlight of any trip to Europe.*

*Everybody raves about the red wines and champagnes from France. The cheese is supposed to be incredible.*

*I think of Italy because I've heard the food in Italy is incredible...and their wine too.*

*I think of Oktoberfest in Germany.*

*Southern Europe, France, Italy, and Germany. They all have good food. The farther north you get, the food is more bland. England doesn't offer good food.*

*I wouldn't say English food is very good, but I'd say going to Paris, Italy, Portugal, they all have good food. I would go to Europe just to do the 3-star restaurants.*

Travelers consider European food appealing not only because it is novel and different from what they would find in the United States, but also because they believe that Europeans prepare their foods with more attention to quality, flavor, and freshness than do Americans.

*It all tastes better because it is new—you're somewhere else. The cuisine is really, really different.*

*Eating there is like eating the culture. It's all about the way food is prepared—it's not processed; the serving sizes are smaller.*

*I am going in May, and I can't wait because I am going to eat for four weeks. It is the quality of the food. There I trust food. It is fresher. It's the way they process the milk...the butter.*

*It is the way they care about food. Here everything is machine made. There, they are kneading, they are boiling; their sweat is in their food.*

## SCENIC BEAUTY

American travelers consider Europe a beautiful and scenic destination. Focus group participants who had been to Europe had many fond recollections of Europe's striking landscapes. Those who had not yet been to Europe had seen and heard enough about Europe to conclude that it is a scenically appealing destination. Past visitors and non-visitors alike commented on the snow-capped mountains of the Alps, fields of flowers in southern Europe, the rolling countryside of Tuscany, and the lush beauty of Ireland and Scotland.

*Skiiing in the Alps, golf courses in Ireland, lakes by the mountains...Innsbruck.*

*I think of Ireland and Scotland—the beautiful hiking and beautiful fields, out away from the cities.*

*In Scotland and England they have really beautiful hills. They have scenery that we just don't have in the United States; it is very unique.*

*I imagine sunflowers and the blue sky. In Switzerland and Northern Italy, you see the snow-capped mountains. In Tuscany you see the fields, the vineyards.*

In the eyes of American travelers, Europe's beauty is not limited to its landscapes. Focus group participants also commented on the visual appeal of Europe's cities, small towns, and villages.

*It's the red tile roofs, the beauty of it all. You can imagine all the paintings you could do with all the beauty there.*

*Some of the cities have their own scenic beauty. Think Regent's Park in London and the city beyond it. It's not just the Alps; there is urban splendor as well.*

## ANCESTRY

For many American travelers, Europe is a key part of their heritage—a place where their parents, grandparents, or distant ancestors came from. Three-fourths of focus group participants indicated that they have ancestral ties to Europe and/or Russia, and that they consider Europe an important place to learn about their own cultural heritage.

*My parents are from there; so are my grandparents. Europe's a little bit of me. Going there allows you to discover a little bit about yourself.*

*I've always wanted to go see where my relatives are from, so I definitely think of Europe from that perspective.*

*I am Italian, so I would love to go there to try all the different foods and experiences.*

*I'd like to go see where my parents were born, the town where they came from.*

Many group participants also remarked that they associate Europe with America's heritage in general, not just their personal ancestry. A number of them commented on Europe's cultural and historical ties to United States and on its role as the cradle of western civilization.

*There is really a feeling about where we all come from. Everything started there.*

*Old world, ancestry, western civilization. It's where our civilization comes from.*

## COST/VALUE

Because of the decline of the dollar against the euro, Europe is thought to be an expensive travel destination—particularly among recent visitors who have experienced the cost of travel firsthand. Many focus group participants shared personal anecdotes about the high cost of food, lodging, goods, and services.

*Europe is more expensive than America for goods and services.*

*The hotel prices, the food prices—they have become more expensive.*

*I had two glasses of iced tea when I was in Europe—they were each \$7.50! It is expensive.*

*The dollar is in the toilet compared to the euro. In four days, I visibly noticed that the prices went up. Also there has been so much inflation. Things are really messed up.*

*I found it very expensive. You go to the supermarket and get a little frozen chicken, and it is the equivalent of about \$11.*

Although past visitors consider Europe to be expensive, most believe that it is still possible to visit Europe on a budget, either by traveling in a less expensive manner or by visiting less expensive destinations. A number of group participants noted specifically that Eastern Europe continues to offer substantial value for Americans.

*It depends on how you want to travel. You can put a backpack on and travel to hostels. This is a lot cheaper than if you stay in hotels.*

*You can still find some things reasonably priced. There are ways to get around the expense. Stay at hotels with a kitchenette so you don't have to go out and spend \$45 for breakfast. And, of course, Eastern Europe is still less expensive than Western Europe.*

*There are some countries that are inexpensive—like the Czech Republic, Hungary, and Poland. Prague is fantastic for the money.*

Somewhat surprisingly, when asked about the cost of traveling to Europe, non-visitors' first reaction was to say that it currently is an inexpensive place to visit. Many noted that airlines are offering dramatically reduced fares to Europe's major gateways and that it is often cheaper to fly to Europe than to fly within the United States or to nearby destinations. When asked specifically about the cost of traveling *within* Europe, non-visitors had a general sense that Europe is expensive, although most were unsure of the current exchange rate.

*Going to the more popular places—London and Paris—there are good airline deals to be had.*

*Airfare from here to Europe is cheaper than going from here to the Caribbean. You can go from here to London for \$399 and it's \$1,300 to go to Dominica.*

*Staying there is probably expensive, but the airfares you see advertised in the paper are cheap.*

*I know the pound is more than the dollar. But I don't know what the euro is worth.*

## QUALITY OF SERVICES

In general, past visitors were fairly positive about their personal experiences with European service. Most agreed, however, that, as in the United States, quality of service varies widely from one establishment to the next. Expectably, non-visitors had less of an idea what European service would be like, not having experienced it firsthand.

Participants in all five focus groups were of the opinion that European service is slower than American service. While “turning tables” is an important underpinning of restaurant profitability in the United States, most travelers commented that in Europe, service is approached with a *laid-back* attitude and is generally much slower. Nevertheless, most participants were not turned off by the idea of slower service. In fact, some said they liked the idea of lingering over a meal.

*It's different in Europe. It's a lot slower. But they are so charming. The person serving you will chat with you. It's like having another person at your table for dinner. It makes it so you don't care if your food comes late.*

*I'd think they are a little more laid back. Here we want to go to McDonald's, where we will get lunch in five minutes. There, the three-hour lunch is the norm. That's what I expect.*

When probed on the individual components of European service—competence, attention to detail, and friendliness—comments were mixed. Most focus group participants noted that you get what you pay for—saying that in upscale establishments service will be good, but in other establishments quality will vary. Others said that it depends on where you are, noting that service in the countryside is likely to be much friendlier, although less professional, whereas service in the cities is likely to be more reserved.

*I am sure if you pay enough you'll find places that are at your beck and call, but if you pay less, you'll get less.*

*I think it depends on whether you're in the city or country. If you go to little places in the countryside, you'll get wonderful, loving service. You might be the only person in the restaurant. They will take care of you.*

Furthermore, there is a strong belief that standards of service are not consistent across Europe. Northern Europe is thought to have service similar to that found in the United States—prompt and generally good. On the other hand, Southern Europeans are thought to be more relaxed, less hurried, and less attentive to detail. The French are thought to approach service with a poor attitude toward Americans.

*In Italy and France it would be very slow. In England it may be faster because it is more like the United States.*

*In Zurich everything worked like clockwork. If you had a question, it didn't matter; they just kept right on working. In Italy, if you wave, someone will come over in an hour.*

*In America we are used to things being very service oriented. In Europe they take long breaks. In Italy, you'd see signs in the window saying we'll be back at 4 p.m., but they'd just as likely be back at 5 p.m. They don't have the same priorities we have here.*

*In France, there is a certain attitude. If you are an American and don't speak French, they won't try to accommodate you at all.*

Service in the Eastern European countries is perceived very differently than service elsewhere in Europe. Focus group participants commented that because the region has just recently emerged from communist rule, the countries are likely to be behind the rest of Europe in the quality of their service and their professional standards. That said, many thought that Eastern European service would be warm, genuine, and quite personable.

*The former communist countries, this is all new to them. I don't think they would be as efficient.*

*Service is a bit rougher in the East. There is still an echo of the Soviet era.*

*I don't think they would be well trained. I don't think they would have learned all that during communism.*

*I think they would be very giving and very accommodating. They are very family oriented. I think we'd find "ma and pa" service.*

*I think they would give you the best of what they have. I would assume the service would be friendly and well-meaning.*

## SENSE OF WELCOME

American travelers who have not yet been to Europe—particularly older non-visitors—are concerned that Europeans view Americans in a somewhat unfavorable light. Some group participants said that they have heard that Europeans consider Americans to be boorish and obnoxious. Others said they were worried about how they would be treated if they did not speak a European language. Some felt that if they did speak the local language and tried not to act like a “stereotypical American,” they would be better received.

*I think a lot of Europeans think we are pigs and bullies, that we are stupid.*

*I've heard that Europeans just think Americans are rude.*

*I think Europeans stereotype Americans as being really abrasive.*

*If you were in a country where you knew the language, they would be nice. English-speaking countries.*

*I think it depends on how you present yourself. There is a stereotypical American that you don't want to be. That's what turns them off. If you show friendliness and try to speak their language with a few words, they will go out of their way to help you, for the most part.*

Many non-visitors believe that Europeans' general dislike of Americans is currently exacerbated by political tensions over the war with Iraq. A number expressed concern that Americans may not be welcome in some parts of Europe in the current political climate. Travelers believe that the antipathy toward Americans is most prevalent in France and, to a lesser degree, Germany. Elsewhere, they would expect Europeans to be less antagonistic, and they expect "coalition partners" to be quite receptive of Americans.

*It depends on where you are. I think of Italians as being friendlier—the people would be smiling. I think France is not so hot, but I don't know about people in Germany either.*

*I think it depends on which countries you are going to. If you are going to England, they will be welcoming. It's France where they are really unwelcoming of Americans.*

*Outside of France I'd expect everyone to be great, to be friendly.*

In general, past visitors to Europe hold a very different view and consider Europeans to be quite welcoming of Americans. Many commented that they have always been treated well when traveling there. Others noted that Europe's tourism-based economy encourages locals to be friendly to all visitors.

*It depends where you go, but since much of the European economy is based on tourism, most places are pretty welcoming.*

*I feel that they want Americans there because tourism is such a part of their livelihood. I always feel welcome there.*

Younger non-visitors also feel optimistic that they will be warmly welcomed in Europe. Many commented that they believe it would be easy to develop camaraderie with locals while traveling—especially on the trains and in hostels.

## SAFETY

Travelers are split in their perceptions about whether it is safe to travel to Europe today. Most past visitors are confident travelers, who feel that traveling to Europe is no more dangerous than staying in the United States or traveling elsewhere in the world. Non-visitors, however, are a bit more wary, believing that Europe may present some safety risks. Some of them question whether the concentration of Muslims in Europe makes it more prone to terrorist attack. Others question whether air travel to Europe is safe in light of the British Airways and Air France cancellations earlier this year. We expect that non-visitors are even more wary in the wake of Spain's recent train bombings.<sup>12</sup>

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<sup>12</sup> The groups took place shortly after cancellations of numerous U.S.-Europe flights and prior to the terrorist bombings in Madrid.

*I don't think Europe is all that safe right now because of terrorism.*

*There are a lot of ethnic people living in London and Paris, Muslims that are causing uprisings. I'm not sure it's all that safe.*

*With all the plane cancellations happening, I'm not all that sure right now.*

*South America, Canada, the Caribbean—those are like home, a little safer. In Europe you hear all this news that makes you feel less safe. It makes you sit up and take notice.*

## ACCESSIBILITY

Few focus group participants were of the opinion that Europe is a difficult place to get to. In fact, only three participants said that they considered Europe to be far away. Americans are used to long flights—domestic flights can take up to six hours.

*It is an 8- to 12-hour trip. It's a long way, which is unfortunate, but not an issue.*

Moreover, many focus group participants noted that Europe is an easy place in which to get around, with a superb network of trains and other transportation options. Many noted that Europe's trains not only offer a trouble-free way for travelers to get from one country to another but also are reasonably priced, on time, and fun to use.

*They are supposedly really on time—not like here, where you'll wait forever.*

*I love that with the trains you can sit back and not worry about driving and just watch all of the scenery go by.*

## ADJECTIVES USED TO DESCRIBE EUROPE

To further probe travelers' perceptions of Europe, we asked the focus group participants to write down the adjectives they felt best describe Europe. Responses were quite varied and included descriptors such as *fascinating*, *exotic*, *mysterious*, *adventurous*, *artistic*, *beautiful*, *breathtaking*, *charming*, *colorful*, *elegant*, *quaint*, *romantic*, *sophisticated*, and *whimsical*.<sup>13</sup> In line with their earlier comments about Europe, many also noted that Europe is *historic*, *cultural*, and *scenic*. Only a few participants wrote down negative adjectives—those who did commented that Europe is *exhausting*, *politically tense*, and *expensive*.

For the most part, past visitors and non-visitors tended to use the same sorts of adjectives to describe Europe. However, past visitors were more apt to say that they

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<sup>13</sup> A more extensive list of the adjectives written down by participants can be found in Appendix G.

consider Europe to be *interesting*, *exciting*, and *adventurous*. Many noted that each trip to Europe offers a new opportunity for learning and discovery.

*It's exciting. It's not like just going to the Caribbean and lying on the beach; it's active. You're always walking around, sightseeing, people watching.*

*The landscape, the casinos, the changing of the guard, everything is exciting.*

*It's a new adventure each time. You might discover something new that you haven't seen. I find that very exciting.*

The few non-visitors who described Europe as *exciting* or *adventurous* said that they chose these words because they thought that it would be exciting to experience first-hand all that they had read and heard about.

*It would be fantastic to see the places I've seen in movies, documentaries, photographs. It is just unbelievable to get to experience that.*

*It would be exciting to be able to put your hand on a piece of stone in a building that has been in existence for hundreds and hundreds of years.*

After discussing the adjectives offered by the focus group participants, we probed several additional adjectives. These adjectives—*lively*, *trendy*, *fashionable*, and *cutting-edge*—were selected to test the feasibility of positioning Europe in a more modern, cutting-edge way.

**Lively.** For the most part, focus group participants felt that the word *lively* describes Europe's major cities, particularly the nightlife to be found in them. They tended to single out southern Europe as being especially lively, mentioning Italy, Spain, and Greece as examples. Interestingly, New Yorkers were somewhat disinclined to view Europe as lively, commenting that New York is the most animated place they know and nothing else compares.

*When I think of lively, I think of Barcelona at night—the street performers, the outdoor street areas.*

*Cities yes, but not the countryside. Cities like Barcelona you want to stay awake until five or six in the morning. In the countryside it's beautiful—you go for walks, look at the land.*

*I think of the Greeks going "Opa!"...going out drinking.*

**Trendy and fashionable.** American travelers tend to associate the term *trendy* with European fashion. Focus group participants singled out London, Paris, Rome, and Milan as being particularly trendy.

*Europe is naturally trendy. European women have a certain way of dressing that makes them look great.*

*It's the fashion in London, France, and Rome. They have the trends before we get them.*

*Europe sets the trends. Select areas are more cosmopolitan. Trendy is Milan, Rome, Paris...the clothing lines, the young people.*

**Cutting-edge.** When asked if Europe is *cutting-edge*, focus group participants initially said no, the United States is cutting-edge. On further reflection, however, many were able to identify specific areas in which they believed that the term applies to Europe—for example, automotive design, housewares, and Europe's transportation system. Nevertheless, group participants felt that the term *cutting-edge* applies only to certain geographic regions—specifically, Northern and Western Europe and, to some degree, Italy.

*We're more cutting-edge with respect to technology. Their cars are cutting-edge. Poland, East Germany—those aren't cutting-edge. Czechoslovakia, they are 50 years behind us. Western Europe—France, Germany, Italy, Switzerland—they are cutting-edge.*

*Their monetary system is cutting-edge. Their transportation system, their railway system is cutting-edge. They are a lot more environmentally friendly. To me that is cutting-edge.*

*There are a lot of stores here that have European products. Boy, they have pretty stuff. And it is stuff you wouldn't see elsewhere. That's cutting-edge.*

*In terms of design, Italy is it. Whatever they do there we will have in four months. They are so forward looking. The same for Paris. The fabulousness of the design is that they draw on their past.*

*German automation, the bullet trains. The high-speed trains were there long before they came over to the States. I went on a hovercraft. That was like, "wow."*

## SENSORY ASSOCIATIONS

After discussing the adjectives that describe Europe, we delved further, asking group participants what sensory stimuli—sights, sounds, smells, and tastes—they associated with Europe. Most of their sensory associations tended to center on food—not just taste, but smell and visual appearance as well. Group participants commented on the way bread smells when it is baking, the visual appeal of a marketplace teeming with colors and textures, and the alluring aroma of coffee at an outdoor café.

*Yum—pastries, breads, cheese, chocolate. It's all so delicious.*

*I think of Italian red sauce, pastas, oregano, tomatoes, and onions.*

*It's the aromas, the restaurants, the simple foods.*

*The taste. They have specialty shops. They don't have everything lumped together. They don't have supermarkets. It's nice to walk in somewhere that specializes in chickens, meat, cheese...and see these things hanging from the windows.*

*I fell in love with gelato when in Florence. To go into a gelateria is such a visual experience. There is such a beautiful display. There are 25 to 50 flavors. I have photographs. It was just fabulous.*

When asked for additional examples of visual stimuli, group participants offered a variety of imagery. Some mentioned Europe's scenic beauty, while others spoke of its colorful artwork and interesting people. However, nothing elicited as much enthusiasm as Europe's food and dining experiences.

*I associate Europe with beautiful blue skies, big clouds, clean air. I think of the beautiful rolling hills, Ireland...the incredible countryside.*

*Lots of flowers, especially if you are in southern Italy or France. I imagine being in a villa opening up your windows, or at a flower market with thousands of colors.*

*I think of anything bright. I think of Gaudi, artwork.*

*Every step there is a new photograph to take. A woman hanging clothes from her line, a few old people sitting at a bench, young people drinking coffee at a café.*

When thinking of the sounds they would hear in Europe, American travelers expect to hear many different languages, the sound of local music, and the sounds of the cities—traffic, people, and a buzz of activity. Interestingly, few group participants commented on the peacefulness of the countryside, concentrating instead on the cacophony of sounds of Europe's urban centers, saying that Europe *is noisy, not peaceful*.

*The sounds of local music in the air. Street musicians, local radio.*

*You'd hear music. Guitars in Spain, not rock and roll. Tunes sung with incomprehensible words.*

Not all sensory associations with Europe are positive. Several focus group participants were of the opinion that Europeans have different standards of personal hygiene than do Americans. Others commented that smoking is much more prevalent in public places in Europe than it is in the United States.

*Body odors. The women don't shave. No one uses deodorant. Not in France or Italy, and maybe not England.*

*Body odor. Hygiene in Europe is different. In some places in Europe it is OK not to take a shower for a week. I think of the combination of leather and body odor.*

*The subways are hot. People don't bathe twelve times a day. They have different feelings about personal odors.*

*My friend just came back from Europe and said that there is smoking just everywhere.*

*Most people over there smoke like chimneys. If you go into a nightclub, you can smell it before you even walk in the door.*

## CHANGING PERCEPTIONS

We asked focus group participants how their perceptions of Europe had changed in recent years. Their first reaction was to say that their perceptions had changed very little. However, on further probing, many group participants—particularly those who had recently been to Europe—said that traveling *within* Europe had become more expensive of late. The good news is that many believe that travel *to* Europe has become less expensive because of the abundance of cheap airfares available today.

*It has grown more expensive. The euro has changed everything. It is almost prohibitive.*

*I went to Europe two years ago and last year. The difference from two years ago was it was about 30% more expensive.*

*I think the hotels and the food are probably more expensive. Transportation to get there is probably the least expensive price these days.*

*I think the cost of getting to Europe has gone down because people are not going to Europe, so they are trying to entice people to go there with good airfares.*

*I think the deals from our end are decreasing in price, but the actual exchange rate of the euro is getting worse. I think it is easy to get there—planes, hotels, package deals. Once you get there, then it is expensive, the cabs, food, souvenirs...*

As mentioned earlier, many travelers—particularly those who have not been to Europe—believe that Europe is less welcoming of Americans than it once was.

*I feel like I would be less trusted over there than I would have been five years ago. I think Europeans are distrustful of Americans right now.*

*I wonder if we would be treated the same way we were before or if it would be worse. I don't think we'd be well received right now.*

*I think it is a bit riskier to be an American. We have a bad rap now. They think we're trying to take over the world. The perceptions people have of Americans. You really don't want to go around saying, "Hey, I'm an American."*

In New York, home to a large concentration of Jewish Americans, focus group participants commented specifically that Europe has become more anti-Semitic and is less welcoming of Jews.

*There is a rise in anti-Semitism. It makes me less interested in going there. My sister was advised not to wear her Star of David when she was in Rome.*

A few focus group participants mentioned that the "Americanization" of Europe concerns them. They noted that Europe has become more like the United States in recent years, a change that makes Europe a less appealing place to visit.

*The more Europe becomes like America, the less interested I am in going there. Greece, the countryside in France, the south of Italy, those places are so different than here. They are loud and vivacious and friendly and warm. That's what excited me.*

*A lot has been Americanized. I would like Europe to stay 40 years behind us. But they are not staying that way. There are McDonald's everywhere. They love the idea of the fast food. It is novel to them. All the new, fast, efficient stuff.*



## IX. MOTIVATIONS AND BARRIERS TO VISITING EUROPE AMONG AMERICAN TRAVELERS

### MOST APPEALING ASPECTS OF EUROPE

There is considerable congruity between Americans' perceptions of Europe and their motivations for visiting Europe. While Americans find much that appeals to them about Europe, their primary reasons for visiting center on Europe's long-standing history, its rich cultural experiences, and its gastronomic pleasures.

*It's all about the history...to see all the places that the world turned on—Verdun in World War I, Waterloo during the Napoleonic period, Normandy in World War II...*

*The fact that everything is historic. Built by the Romans, occupied by the Huns, taken over by the Goths, burned by the Huguenots. They preserve their heritage. I think that would be fantastic to see.*

*The architecture is stunning. There is nothing like it here, the agelessness, the timelessness of it all. All the stained glass. I feel like I belong there. It is indescribable. It's the bridges in France that were built by the Romans. It's all a thousand years old. You look around Los Angeles and nothing is more than 50 years old.*

*Culture, lifestyle—that's what I want. Museums, galleries, art displays. I want to go to the Prado. I want to enjoy the cuisines and wine.*

*The architecture, food and wine, cultural opportunities. It's the museums, the street performers, the plays, the music. That's all of interest to me.*

*I'll go for the food. I want to really experience the spices, the different tastes. I want to experience new tastes, smells...*

Travelers who have not yet been to Europe want to see for themselves all of the things that they have read and heard about. They are particularly drawn to Europe's icons and iconic experiences.

*I want to go there to see the things I've seen pictures of—the Louvre, the Eiffel Tower. There are so many things I am familiar with—having read about them or having seen pictures. I want to go there to stand and look at them or go inside them.*

*I want to go to Europe to see all the stuff you normally only see in books. To see the Picassos, the Monets—that's the novelty of it all.*

*I would love to be standing in the Greek ruins thinking about everything I've ever read about them. Or be in the Eiffel Tower, seeing the places I've read about, seeing them live.*

On the other hand, travelers who have previously been to Europe are looking for a more in-depth experience. They are particularly drawn to experiencing the European way of life and meeting the local people.

*For me, it's about the difference between their culture and ours. I want to meet the natives and just hang out.*

*Above all, it is associating with the people. What's appealing is their different views, experiencing new ideas.*

In general, relatively few focus group participants mentioned Europe's contemporary attractions when asked about their motivations for visiting Europe. When probed on the topic, focus group participants who had not yet visited Europe were often at a loss to identify contemporary attractions. Moreover, they were quick to reiterate the fact that they are drawn to Europe by the traditional, not the contemporary.

*Is there a contemporary side of Europe? I really don't know.*

*I don't think there is anything contemporary that we don't have over here.*

*No one has really advertised contemporary Europe here. We don't have a concept of what is different between the United States and Europe from a contemporary standpoint.*

*The modern I don't care about. I can go to New York or downtown Los Angeles. I don't want to see the new parts of Paris. I want to see the old parts of Paris.*

*My motivation isn't to go for trendy. I think people want to go see the quaint side of Europe.*

Past visitors—and younger non-visitors—were more open to experiencing Europe's contemporary side. Although few were interested in visiting Europe solely for its modern elements, a number of focus group participants said that they would be interested in experiencing a combination of the historical and the contemporary. In fact, several said that they were attracted specifically by the juxtaposition of old and new.

*What is fascinating is the combination of old and new. Imagine you're standing in the Kremlin and right next to it is a cell phone shop. There are brand new buildings next to historical monuments. It is interesting to see how things have changed.*

*I like how they insert contemporary but still preserve the historic. They don't just tear down old buildings to build something else.*

*I think they manage to incorporate history in modern things. You constantly have contemporary and historical operating at the same time.*

When asked what interests them about contemporary Europe, focus group participants offered a variety of thoughts, touching on fashion, automobiles, shopping, dining, and spa visits. Younger travelers, in particular, mentioned Europe's nightlife and contemporary music scene.

*I think they play an important role in design, in fashion, in furniture. I think that would be interesting.*

*Munich has an interesting technology museum. I'd like to see the place in Germany where they test drive the Porsches, BMWs, and Audis outside of Munich. In Regensburg I want to go to the BMW plant.*

*I would go for the shopping—for the flea markets, the boutiques, leather, art. They have so much.*

*The spas and mineral baths. I'd like to do that to experience the healing properties...*

*If I were to go to London, I would go to all the newest plays. I'd do contemporary things in London. I'd listen to new music.*

*Berlin is supposed to be very progressive. It is a hotbed of fashion, music, and art. There is also a lot of historic significance there too.*

There are a number of minor differences between travelers from the East and West Coasts. For instance, focus group participants from New York mentioned that Europe's beaches are a draw for them. The same was not true for focus group participants from Los Angeles, where beaches are close at hand. Instead, Los Angeles participants expressed a greater interest in visiting Europe for its traditional architecture, which contrasts with Los Angeles's very modern architecture.

## LEAST APPEALING ASPECTS OF EUROPE

Generally speaking, American travelers have few reservations about Europe as a place to take a vacation. Focus group participants who had been to Europe had few serious complaints. Some non-visitors, however, voiced concern that language might be a barrier. They were concerned that because they would not be able to converse with the locals, they would be poorly received. Further, they were concerned that they might be unable to get around easily because they could not ask for directions or interpret signs.

*Language. I don't feel comfortable not knowing what they are saying.*

*In the cities, you can pretty much get by with English. In the countryside, I'm not so sure.*

*I feel like I wouldn't have so much fun in Italy since I don't speak a word of Italian. I think I could get by, but people are much more receptive if you try to speak the language.*

*I've always heard that if you don't speak the language, they just won't be nice; they will look down on you.*

Many non-visitors are also concerned about the effects of terrorism. For most, the worry is not that Europe has become less safe but that travel in general is not safe. Some, however, do feel that air travel to Europe is risky, and that travel to specific areas of Europe—England, France, Turkey, and Greece in particular—is now riskier than it was before 9/11 and the Iraq war.

*My fear is getting on an airplane—not getting to the destination, but the flight.*

*I'm less concerned about terrorism in Europe than just going through the airports coming and going. That's one reason I've put off traveling.*

*Terrorism—definitely. It depends where you are going. If you are going to Sweden, the Netherlands, England, I don't picture terrorism there. I'm picturing more danger in France...Greece. I'm not sure how thorough they are there in their airport security.*

*I think that we have become targets for terrorists...Americans are sitting ducks.*

*Americans are certainly the number one target of terrorists, and our allies are as well.*

Distance, poor service, crime, crowding, and high prices are not issues keeping Americans from visiting Europe. Virtually no one said they would be put off from visiting Europe because of these issues. Some said that crowded subways, slow service, and petty crime are simply factors to be dealt with, not deterrents.

*Crowding? No, we live in a big city; we're used to it.*

*They will do things at a slower pace. That's just the way they do things.*

*You can't be in a hurry over there. You can't expect the bill right away. You might be sitting there for 20 minutes. But that's not a reason not to go.*

*Crime? It's just like here.*

*It is expensive, but it is worth it. The cost wouldn't stop me from going.*

## CHANGING INTEREST IN VISITING EUROPE

Despite terrorism, political tensions, and the strengthening euro, travelers continue to express strong interest in visiting Europe. In fact, more than a third of the focus group participants said they were more likely to visit Europe now than they were just a few years ago; most of the remainder said that they were equally likely to do so. Some participants said that they had been putting off a visit and that now was a good time to go. Others said that they were attracted by the abundance of low airfares to Europe.

Only a handful of focus group participants, most of whom had not previously been to Europe, said they were less inclined to visit Europe now than previously. They tended to cite the current terrorist climate and fears about flying as the primary reasons for delaying a trip to Europe.

*I am afraid to fly to Europe right now. I am worried about all of Europe. I think that we'd be fair game flying across the ocean.*

*As much as I would like to go, I would rather just stay here in the United States right now. You hear so much about the military presence in the airports of Europe. I'm a little bit afraid to go there.*

*I felt more comfortable going before 9/11. Now I am a little afraid to go. It's the flying over there. We know how to be careful here; over there, I'm not sure. I don't know what areas are high-risk.*

*They are stopping planes that are going there or coming from there. Lately, it's really scary. There has been a lot of negative activity.*

*It's not just Europe. There are soldiers in flak jackets and M16s at our airports. It puts a damper on your interest to fly.*

Others said that they prefer to wait to travel to Europe—particularly to France—until political tensions over the war in Iraq have diminished and the situation has returned to normal.

*Right now, the lack of welcome to Americans is a concern that never existed before. I think I'd probably want to wait to visit Europe until this all blows over.*

*I wasn't so happy with the whole thing that played out with the Iraq war. I wasn't happy with France. I haven't been buying French wine or going to French restaurants. France is somewhere I'm less likely to visit right now.*

*I wouldn't go to France until I was convinced they are our friends.*



## X. MARKETING EUROPE IN THE UNITED STATES

### SHOULD EUROPE BE MARKETED AS A WHOLE?

We asked focus group participants whether they would be more likely to respond positively to an advertisement showcasing Europe as a whole, a region such as Scandinavia, or a single country such as Norway. More than half of them said that they would be most likely to react favorably to an advertisement showcasing a single European country. Another third said they would prefer an ad focused on one of Europe's regions. Only a handful said that an advertisement depicting Europe as a whole would resonate most strongly with them. Responses to this question did not differ appreciably by gender, age, or city of origin.

Many focus group participants said that they would prefer to see an advertisement focused on a single country because their interest in Europe is driven by a desire to visit specific countries, not Europe as a whole.

*When I have a desire to travel, I really have a craving for a specific country. I don't think, "I want to go to Europe."*

*I don't think of going to Europe. I think of going to France, to England, to Italy—not Europe.*

*When people think of Europe, they think of a single place. They don't think of Europe in total. I think Paris, I think Italy, I think Greece. I don't think of all the other countries that comprise Europe.*

Many group participants said that when visiting Europe, they would be likely to limit their trip to a single country or a small group of countries so as to experience as much as possible of what these countries have to offer. Additionally, some travelers noted that because of limited vacation time, they are unable to visit more than one or two countries at a time.

*Europe is just too much. It would be overwhelming. You can't see it all. You have to choose a few places to visit.*

*I think I'd plan a trip to Europe in blocks—I'd see just a few countries at once.*

*We don't have enough time to see very much. I just want to see information on one country at a time.*

Some travelers were concerned that an advertisement depicting all of Europe would not include the level of detail needed to stimulate their interest and to plan a trip. They felt, however, that an advertisement focused on a region or single country

could effectively communicate the breadth of activities, sights, and experiences available there.

*When you see an ad for a single country, they will probably show a few different pictures and that could give ideas of different things to do in that country.*

*If I saw a regional ad, it might give me ideas of places to go or things to do that I wouldn't have originally thought of.*

Among the handful of travelers who were favorably disposed to an advertisement promoting Europe as a whole, most felt that a broad depiction of experiences and cultures would do the best job of stimulating their interest in visiting Europe.

*An ad showing all of Europe could show how easy it is to travel through all of Europe and to see different cultures—what you'd get out of a trip to Europe.*

*I'd like to see an ad with different people, different ethnicities, old Europe, new Europe, a bit of everybody.*

## COMMON THEMES ACROSS EUROPE

We continued to explore the concept of marketing Europe as a whole by asking group participants to identify the common themes that unite the countries of Europe. Most participants found it difficult to point out very many similarities across Europe—a difficulty that probably contributed to their failure to embrace the idea of promoting Europe as a whole. Many focus group participants commented that Europe is appealing not for its uniformity but for its diversity of people, languages, cultures, and topography.

*Every country is different. There is so much variety.*

*I don't think of commonalities across Europe. I think of it as many individual countries and cultures.*

*Italy, Prague, Venice. Their differences are what I note. They are much more different than they are similar.*

*Europe is a great group of different cultures all combined together. You have a lot of different nations with different customs, languages, and cultures.*

Those travelers who believe that the countries of Europe do share commonalities point to the unifying elements of history and culture. Many participants stated that all of Europe is old and all countries show evidence of Europe's age in their landmarks,

architecture, and ruins. Additionally, many participants noted that most European countries have a rich artistic and musical heritage that is still alive today.

*There are all these buildings that are centuries old. I think of lots of stone-made buildings, brick, and solid buildings. Not just in Italy or Germany, but everywhere in Europe.*

*So many European countries have world-renowned museums...the Prado, the Uffizi, the Louvre...*

Interestingly, a number of travelers also commented that Europeans, regardless of where they are from, demonstrate a strong commitment to family and family values.

*Their sense of family. It is common to see big groups of families together—multi-generations living and doing things together. They live together, they eat together, they do things together.*

*Traditions. They are very ensconced in tradition, in family. They are not too focused on the fast track.*

*They are much more family oriented than we are. It is not unusual to have three generations living together.*

## THE REGIONS OF EUROPE

To achieve a better feel for how Americans categorize Europe, we asked focus group participants to organize Europe into regions—that is, groups of countries sharing similar characteristics and imagery. Participants offered groupings similar to those provided by the U.S. travel trade. Like industry professionals, travelers quickly identified the United Kingdom, Scandinavia, and Eastern Europe as distinct regions. Additionally, group participants were quick to point out that the Mediterranean countries are their own region. Suggestions on how the remaining European countries should be grouped varied.

**The United Kingdom.** The United Kingdom is commonly thought to comprise England, Ireland, Scotland, and Wales. It is easily distinguished by its geography and commonly associated with *pubs, castles, lush fields, Shakespeare, Sherlock Holmes, bobbies, the changing of the guard, royalty, the color green, and historical ties to the United States*. A few travelers noted that, as a country, the United Kingdom is particularly friendly to Americans and is the least foreign of the European regions.

**Scandinavia.** Scandinavia, or the *Nordic region*, as some participants called it, is generally thought to include Finland, Sweden, Norway, Denmark, and, for some, Holland. The region is associated with its citizenry (*friendly people, blondes, pretty girls, hearty people*), its cold weather (*cold, ice hotels, skiing, cold-weather sports*), and its

gastronomy (*pickled foods, cheese, vodka*). A few travelers also commented that people in this region are likely to speak English.

**Eastern Europe.** The former communist countries are perceived as a single region under the names *Eastern Europe, Central Europe, or the former Soviet Bloc*. This region is thought to include the Czech Republic, Hungary, Poland, Romania, the Baltics, and the Balkans. Some group participants also included Russia and Turkey in this grouping. Common imagery and associations include *communism, the Soviet Union, war, cold weather, heavy foods, churches, cafés, and rich culture*. Although they perceive it as somewhat *old-fashioned* and *behind the times*, many travelers would like to visit the region because it represents a new travel experience after being inaccessible for so many years. Additionally, some commented that because it was closed off, it is better preserved than other parts of Europe and offers a more authentic experience.

*We couldn't go there for a long time, so I want to go now.*

*Eastern Europe presents more of an adventure. There is a lot less modern infrastructure there. It's like it was frozen in the cold war.*

*I think the eastern region has gorgeous countries because they haven't been messed up with a lot of modernization. If you're interested in history and old architecture, you are probably better off traveling there than Western Europe. But there are probably fewer amenities. The hotels probably aren't as nice.*

**The Mediterranean.** Travelers define this area, also commonly referred to as Southern Europe, as including southern France, Portugal, Spain, and Italy, and, for some, Greece. The area is commonly associated with its *relaxed style of living* and *animated people*, its food and wine, and its temperate climate.

**Western Europe.** Focus group participants were less certain about how the remaining countries of Europe—France, Germany, Belgium, Holland, Switzerland, and Austria—should be categorized. Many considered these countries the core of Western Europe. Others grouped a subset of them—Germany, Austria, Switzerland, and northern Italy—into the Alpine region. These countries bring to mind *beautiful architecture, castles, the Alps, beer, wine, food, fashion, and sophisticated, modern cities*.

## REACTIONS TO SELECTED IMAGES OF EUROPE

To conclude the focus group discussions, we asked participants to react to five images of Europe provided by Spring O'Brien, the ETC's new U.S. advertising agency. Participants were told that the images were concepts, not a final campaign,

and were asked to provide feedback on one image at a time. A discussion of participants' reactions is presented in the order the images were viewed.<sup>14</sup>

**The gateway to Europe Updated.** Focus group participants reacted more negatively to this image than to any other. They said they did not like it because it does not look like Europe, noting that it could be anywhere. Moreover, they felt the picture was too modern and cold and was not representative of the things they expect to see in Europe. With the exception of only one person, the focus group participants did not recognize La Défense. Because they were not familiar with the subject matter and did not like the picture, most indicated that they probably would not stop and look at it if they were to come across it in a magazine. Further, it would not inspire them to go to Europe.

*What is that? I just don't get what that is. It looks like an ad for Microsoft or the new American Express card.*

*Where is this? Is it Amsterdam? Germany? Tokyo? Paris? This looks like Michigan Avenue. It's too contemporary. It doesn't make me think Europe.*

*I certainly don't want to go there if I don't even know what it is.*

*It looks like the Arch in St. Louis. I'd rather see the Arc de Triomphe or the Eiffel Tower. It's not a picture that I'd say, "Oh my god, I have to go to Europe."*

Travelers suggested that an advertisement with a recognizable image that clearly identifies it as European would be better received. Nevertheless, while most would prefer a recognizable, historic European landmark, they did not object to incorporating contemporary architecture as well. Some suggested placing the current picture next to one depicting traditional Europe—the Brandenburg Gate or the Arc de Triomphe, for example—to clearly depict the idea of “Europe updated.” Others suggested using a single photograph with both traditional and modern imagery, similar in concept to the I. M. Pei pyramid in front of the Louvre. Focus group participants also suggested labeling contemporary imagery to avoid putting off travelers unfamiliar with the image and to develop familiarity with contemporary Europe.

*It needs to be a picture that I'd recognize—that everybody would recognize.*

*Show something more recognizable—the Eiffel Tower, the Arc de Triomphe...*

*If you are going to talk about updating the gateway, you should show something original and then something updated.*

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<sup>14</sup> Copies of the images are contained in Appendix H.

*You could tie the traditional with modern by using a historic site and using modern lighting. Or you could show the modern arch with something more traditional beyond it.*

*If it had a caption describing the picture, at least I'd look at it longer; maybe that would catch my attention.*

**Wine + dine.** Again, this image—a close-up of two people eating pizza—was not perceived as uniquely European and therefore would not stimulate interest in visiting Europe. Most group participants thought the use of pizza in the image made it more American than European. Furthermore, they felt the image itself did little to depict what is appealing about European dining.

*It looks like Las Vegas. It looks like it is something from America, not European at all. It's like a Piz̃za Hut ad.*

*I don't think of piz̃za when I think of European dining. I think of pasta, pastries, wiener schnitzel, bread, cheese, and fresh vegetables.*

*This picture could have been taken anywhere in the world. It doesn't show the atmosphere. It just shows two people. It needs to show a background that says Europe. A little French caf , maybe the Eiffel Tower in the background.*

Travelers were split in their reactions to the tagline “Wine + dine.” While some found the words a bit commonplace, many said that food, wine, and the dining experience are things they closely associate with Europe and things that make them want to go there. Travelers suggested that the image should clearly reflect the relaxed attitude and quaint atmosphere of a European dining establishment. Most mentioned that an image clearly set in France or Italy would elicit the most positive associations with European food. Additionally, many participants noted that if the tagline is to read “Wine + dine,” the picture must include wine.

*I want to see a picture on the Left Bank with a little table and people drinking a few glasses of wine. It needs to be elegant, sophisticated.*

*Show them in a small caf  with a carafe of wine or delicious pastries. Show them having a picnic on a riverboat in France. Show more background. Show Notre Dame or something scenic that perhaps shows where they are.*

*I'd rather see a caf  with a suave Frenchman in the background—maybe a waiter. There could still be a young girl there eating her food to show the contemporary, young side.*

*There should be wine, maybe champagne. Maybe a picture of the vineyards with people in the foreground holding up their glasses to make it feel welcoming.*

**Art + architecture.** Participants were split in their reaction to this image. While most liked the tagline, saying that art and architecture are two of the primary reasons they want to visit Europe, responses to the image varied widely. Some reacted negatively, saying that the image fits neither with the tagline nor with their perceptions of Europe. Older, first-time visitors to Europe were particularly put off that the image was not congruent with the tagline.

*I like that this addresses art and museums. That's what is calling me about Europe.*

*The heading I love, but the picture doesn't fit.*

*I like the subject matter, but the picture is terrible. What is that? She looks like Euro trash. I love the idea of art and architecture, but this picture offends me.*

*It doesn't show architecture. Well, maybe she's the architecture. Plus, it doesn't tie into Europe. This could easily be here in LA.*

*This doesn't showcase the reason I'm going to Europe. To me, Europe is old. I want to see old.*

Others, however, liked both the tagline and the image, saying that it gives a new twist on old Europe. Those who liked it responded favorably to the young, trendy feeling the image conveyed and the fact that it shows that Europe offers more than just history.

*It brings in glamour. She's very chic. She's got attitude.*

*Europe is sexy and it is fashionable. It says Europe has changed. Europe is not just for old people.*

*I think it is playing to young, trendy people. The frame is old world, but she's trendy, fashionable.*

*I think it is very cutting-edge, and it reminds you there are other things in Europe. I want to know that there is more to Europe than the old aspect.*

When asked how the image could be improved, participants suggested maintaining the use of the old picture frame but moving the scene to the streets of a cosmopolitan city and including architecture to better tie in with the tagline.

*Art and architecture should be in a city setting with buildings behind her. I like the frame, the whole idea of it, but I don't like the scene she's in.*

*Put another known landmark in there with the fun frame in front. You need to put architecture in here. Maybe they could show the Eiffel Tower coming through the picture frame.*

*Dress her in something trendy and fashionable—maybe a big hat—and put her on a city street with a building behind her, or on a bridge with a skyline behind her.*

*The antique frame with a modern building could work. Or a picture of the Mona Lisa pointing at Frank Gehry's newest building. Or you could do the opposite, a very modern painting in front of the Duomo.*

**Fashion + Fun.** This image elicited generally poor reactions from group participants. It was received more positively in New York, where the group members expressed greater interest in Europe's sense of style and fashion. Among those who did not like the image, the major complaints were that the image is too juvenile, it does not speak to American travelers, and it does not accurately represent Europe's sense of fun and fashion.

*This is really giddy. I would expect something more elegant when you think of Europe and fashion.*

*I think she looks like she's having a good time, but I don't necessarily think that I'd jump on a bed in Europe and have a good time. It's just not something I'd do.*

*Where is the fun? Fashion is in there, but I don't see any fun. It's really more about fashion than anything else.*

*You have to like fashion to care for this.*

Focus group participants again suggested that a photograph that includes more recognizable European imagery and that more clearly articulates what is fun and fashionable in Europe would be better. However, generally speaking, most participants felt that fashion and fun would not compel them to visit Europe.

*If they had a four-poster bed that looked romantic and fun and showed her in a blur actually jumping, that might work.*

*If you took the Mona Lisa in the background to make it look like Europe. Show the Big Ben clock. Have the whole thing—a woman on the bed, but put it out in a recognizable European street.*

*I'd rather see a runway with fashion models or maybe see a model on a ferris wheel or at an amusement park.*

*I want to see an old lady with a babushka and maybe you could put a couture model in the fountain behind her.*

**It's the American century. But it's the European season.** Group participants overwhelmingly preferred this image to the others, saying that it best fits their image

of Europe and is most inviting. They particularly liked that it shows a *slice of life* and represents a *quaint* look at Europe. Additionally, they thought the picture was appealing because it could be anywhere in Europe. Because they felt the image represented their ideal of Europe, almost all said it would motivate them to want to travel to Europe.

*Ah, now you're talking. That's a whole lot better. It has humanity. It shows a life occurrence. It shows a European street. It shows modern yet more traditional. This is more inviting, softer.*

*This is Europe—the cobblestones and the itty-bitty street. The way it is slanted up, the buildings—that all says Europe. You can see the building is more stone, as opposed to brick. Looking at this I can easily say that this is not any place I'd see in the United States.*

*I like the way the street is pulling me into the picture. You could almost dream about being there. This makes me want to go there. It looks fun.*

*This picture fits with my picture of Europe. Europe is very romantic, and this shows that selling point about Europe.*

To improve the image, travelers suggested using a street scene that is even more traditionally European—a more picturesque street with flower boxes at the windows, charming shop windows, or even a quaint, homey café or restaurant in the background.

*I'd make the ad more realistic, use brighter colors, make it more vibrant. Show a patisserie in the background. Make it look more attractive. Show a street going downhill and then a background of the city.*

*I'd put a restaurant in the background or put flowers in the windowsills.*

*Maybe show the terraced shot in Florence that looks over the city roofs. These two people could be smooching there.*

*I think this picture would be good in black and white. That could bring out the modern.*

Few travelers liked the ad copy, and most felt the image would resonate more strongly without it.

*I'd like to see this without the wording. "It's the American century"—what does that mean? It makes me feel that we are focusing too much here in America. It's kind of egocentric, kind of arrogant. It's always about us.*

## REACTIONS TO THE “EUROPE UNLIMITED” TAGLINE

At the request of Spring O’Brien, we asked New York and Chicago participants for reactions to the “Europe Unlimited” logo. Most were favorably disposed to the logo, commenting that the words made them think of the diversity and range of experiences to be had in Europe. Furthermore, some commented that the use of an eclectic set of fonts and colors reinforced the concept of Europe’s diversity. The only complaint was that the logo does not convey Europe’s sense of style and sophistication.

*The word “unlimited” is different. It makes me think of all the different countries and cultures of Europe.*

*It makes me think “no limits”—I can travel anywhere I want in Europe.*

*The different fonts make me think of diversity throughout Europe.*

## SUGGESTED IMAGERY

After discussing the individual concept boards, we asked travelers what other images they would like to see in an advertisement for Europe. Many started by saying they would like to see iconographic images of Europe—the Eiffel Tower, the Colosseum, and the Tower of London. However, when probed further, most said that the icons were less important than seeing images that are obviously not the United States but are clearly recognizable as Europe.

*When I look at it, I need to know it’s not Chicago, not the United States. I need to know it is Europe.*

*Pictures don’t need to be recognizable, just obviously Europe.*

*When I don’t know what an ad is about, I won’t pay attention to it. I want to know right away that I am looking at an ad for Europe. I don’t want to have to figure out what the ad is saying to me.*

*If you are trying to make someone go to Europe, you should show pictures that in the past have actually drawn people to Europe. It could be David, the Louvre, anything that is visually well known to most people, whether they have been there or not.*

Group participants offered many suggestions about what looks quintessentially European. Suggested imagery included ornate Eastern church domes, old women in babushkas, quaint villages with cobblestone streets, the dramatic snow-covered peaks

of the Alps, piazzas and town squares with a fountain in the center, and traditional architecture.

When asked if they would like to see more contemporary elements highlighted in an advertisement for Europe, focus group participants were fairly open to the idea. Most said that contemporary images are fine, as long as they are used in concert with images of older, traditional, or iconic Europe.

*It's not that the modern stuff is unappealing, it's that we don't really see it, we don't really know about it. Maybe if we saw a regional ad that included the modern and the traditional—the casino in Monaco, the ocean, the people, a little of all of it—that would give us ideas.*

*I like the idea of the ads being cutting edge, but they can't forget the identifiable—the Ponte Vecchio, the Eiffel Tower.*

*You can put something more contemporary in an image with old elements—maybe a cobblestone road with a new Mercedes.*



# XI. PERCEPTIONS OF EUROPE AMONG CANADIAN TRAVELERS

## UNPROMPTED PERCEPTIONS OF EUROPE

As in the United States, we began the Canadian focus groups by asking participants to write down “What comes to mind when you think of Europe?” Participants offered a range of associations, the preponderance of which were positive. The following are a few examples: *Greek antiquities, castles, architecture, artistic treasures, museums, opera, good food, vineyards and wine, little French villages, beautiful countryside, many countries close together, varied cultures, and friendly people.*<sup>15</sup>

Participants were also asked to share their responses with the group, and the ensuing discussion provided additional commentary and insight. The most common responses centered on history, culture, and gastronomy.

Many focus group participants wrote down words such as *historic* and *old*, or made specific reference to *old cities, old buildings, castles, chateaux*, and so on. One participant described Europe as the *cradle of western civilization*; others described it as being *rich in history* and *untouched by time*. In discussing history and historical attractions, focus group participants were quick to contrast Europe’s history with Canada’s relative newness. At the same time, a few participants recognized Europe’s modernity; several noted that Europe represents a mixture of old and new, and one wrote down that Europe brings to mind *extremely modern places, people, and ideas*.

Second only to history and historical attractions, focus group participants wrote and spoke about *culture*. They frequently addressed elements of contemporary culture, touching on the *people, social life, atmosphere, and character* of Europe. To a somewhat lesser extent, they also addressed traditional culture and cultural offerings, including *art, museums, art galleries, and opera*. In discussing culture, several focus group participants made reference to the fact that there is great cultural diversity in Europe, including *political diversity, religious diversity, and many different languages*.

A number of focus group respondents wrote down words and phrases related to gastronomy—*good food, good wine, cafés, espresso*, and so on. In the ensuing discussion, many others who had not thought to write about food and wine concurred that gastronomy plays a central role in their impressions of Europe. French-speaking participants were especially enthusiastic in their discussion of gastronomy.

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<sup>15</sup> Appendix I contains a more extensive listing of participants’ written answers.

## DEPTH OF KNOWLEDGE

Canadians believe they still have a lot to learn about Europe. Those who have never visited Europe say that their inexperience with the destination is one obvious reason why their knowledge is limited.

*I can say I probably don't know it too well. I have never been.<sup>16</sup>*

*The first idea that comes to mind is that I have never been. Of course, if I were to go, I would be sure to read up on it more...I have some knowledge because of what I have read, the courses I have taken, but not enough to have a concrete idea of how it really is.*

Past visitors also realize that they still have much to learn about Europe. They recognize that Europe is a very diverse destination and believe that one must do more than spend a few weeks visiting the main tourist attractions to understand the people and their cultures.

*Geographically, yes. Culturally, to a point—but I can only speak to being to Ireland and briefly to England.*

*I have only been there three times, and I feel like I am always discovering.*

*You spend one week in a hotel and one week touring around, but you don't really get to know the people—you just get the basics.*

It became evident during the course of the discussion that the Canadian focus group participants were actually more aware of current economic and political conditions than they professed to be. In all of the groups, at least some participants were knowledgeable about exchange rates and about upcoming expansion plans for the European Union. Moreover, a number of participants commented on current European political situations, such as the recent ruling in the French courts regarding the wearing of headscarves in schools.

Asked specifically about their ability to differentiate among the architectural styles of various European countries, the focus group participants were of the opinion that it would be difficult for them to distinguish between German and Dutch architecture, for example, but that they could probably distinguish between styles that were very different from one another.

*Spain and Germany probably; they are very different.*

*If you put the Parthenon beside the Colosseum, then yes.*

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<sup>16</sup> All comments that were originally given in French have been translated to English for this report.

In the same vein, when asked about their ability to differentiate among various European nationalities, participants were of the opinion that it would be difficult for them to distinguish between a Finn and a Dane, for example, but that they could probably distinguish among nationalities that were more distinct from one another. Interestingly, they were most confident of their ability to distinguish among languages and accents.

*Could I tell the difference between a German and an Englishman? Yeah, definitely. Could I tell the difference between a Latvian and a Lithuanian? No, not at all.*

*Yes, their language. Even between two countries where they speak the same language, like between France and Belgium.*

## DETAILED PERCEPTIONS OF EUROPE

We continued to explore participants' perceptions of Europe as a vacation destination, probing a number of areas in depth. Specifically, we probed for perceptions related to history, culture, gastronomy, scenic beauty, ancestral ties, cost/value, quality of services, accessibility, and safety. Additionally, at the request of the ETC's Canadian Operations Group, we probed for perceptions related to shopping, outdoor activities, and cities versus the countryside.

### HISTORY/HISTORICAL ATTRACTIONS

Further discussion reinforced the finding that history is a defining element of Europe's identity in the minds of Canadian travelers. Focus group participants reiterated their desire to experience Europe's many historical monuments and attractions—particularly since such sights barely exist in Canada.

*The last time I went [to Europe] I went to a wedding in an 11<sup>th</sup> century abbey. I went to mass in a cathedral from the 11<sup>th</sup> century too. Being there, you feel like...wow.*

*There is a sort of durability...everything lasts. Here, as soon as something is 50 years old, you knock it down and start again.*

*We don't have castles; we don't have architecture.*

History appeared to play a particularly important role for older, English-speaking participants, who were generally less interested in the contemporary aspects of Europe. However, even among those who professed an interest in contemporary culture and modern attractions, Europe was perceived as a place that is defined by its history and the look of its cities, buildings, and churches.

## CULTURE

Although culture had already come up unprompted in discussions in each of the groups, we prompted participants to speak on the subject again. This exercise yielded many insightful comments that helped clarify what “culture” means to Canadian travelers. Most notably, participants in each of the groups spoke extensively about the particularities of the local ways of life. They believe that Europeans act differently than Canadians, and many participants said they would travel to Europe for the opportunity to observe the differences and learn more about the local people and traditions.

*For me, culture is mostly the lifestyle of people.*

*You look at them and you're flabbergasted just to watch them live because it is different from here. That is what I appreciate; it's the difference.*

*I like to go outside and see if you can figure out what the culture is all about. I want to find out all about it.*

Young people, in particular, spoke of wanting to understand the local culture and even to *blend in* and *live like a local*. This type of mentality is common among young Canadian travelers, who see travel as an opportunity to grow by broadening their understanding of the world's different people and cultures.

Participants—particularly non-visitors—viewed the European lifestyle as being vibrant and open. They were intrigued by this and, in many cases, applauded it, remarking how Canadians are generally too reserved and could benefit from a little excitement. Comments also illustrated the perception that Canadians—and North Americans in general—spend too much time working and don't take advantage of leisure time in the same wholehearted manner that Europeans are perceived to do.

*In Germany they are so...well, you just have to go to the beach and everyone is nude. It's great.*

*We are so stiff compared to them; they are much more loose. They're friendly and outgoing.*

*They are very free...and treasure their own personal time. Their holidays are completely different from here. They just know how to live, so the people are vibrant.*

*In most of the countries, the people are happier than us. They take more time to live...in the evenings there is singing, dancing, partying.*

The opportunity to explore museums, galleries, music, and the arts is another appealing aspect of European culture. Older travelers more frequently mentioned these aspects than did younger travelers.

*I would likely end up in the museums and art galleries.*

*I would visit the big cities to tour the opera houses, the concert halls, and the things that are interesting from a musical and cultural standpoint.*

*I went to Vienna...everything feels musical in Vienna; it's extraordinary.*

## GASTRONOMY

Many participants—particularly French-speaking participants—held strong associations between Europe as a vacation destination and the opportunity to taste European wines, cheeses, and dishes. Part of the appeal of the food and the wine is the atmosphere in which it is consumed—unhurried, with a focus on enjoying oneself, one's company, and the food on the plate.

*I would say the richness of the gastronomy. Each country, each region has its specialties.*

*I would like to go to the vineyards and taste the products at the places they are made.*

*It's just being there that changes things. It's the atmosphere, it is being at the source, because all of those dishes, foods, we have them in Montreal too.*

*Here you go to lunch, you have your lunch hour, its rush, rush, rush.*

A small minority believe that with the diversity of cultures to be found in Canada's own cities, it is not necessary to go overseas to have an authentic taste of European foods and wines.

*All those products in European countries, we have them all here in Montreal too. The wines and everything.*

*The wine and the food...I love some of it, but I feel like I can get a lot of that over here just from importers in little Italy...I feel like it's close to being comparable.*

## SCENIC BEAUTY

Canadian participants believe that the cities and countryside of Europe are visually stunning, and they spoke of a range of different sights they would like to see.

*I always come back to beautiful...the Alps, the Mediterranean. It makes me think of the seaside.*

*Over there, even if something modern is built, it is done in a way that ensures harmony with the buildings that surround it.*

## ANCESTRY

In general, the ancestral connection did not come up as frequently as it did during the Canadian travel trade research. Nevertheless, French speakers acknowledged a tie to France, and the frequency with which the country was mentioned indicates that it is certainly very top of mind when they think of Europe.

Many participants in the Toronto groups were born to parents who had emigrated from Europe to Canada—a reflection of the intensely multicultural identity of the city. A number of these second-generation Canadians identified closely with the culture of the country of their family's origin, even if they themselves had never been to Europe.

## COST/VALUE

Despite the fact that cost was rarely mentioned without prompting, when participants were asked specifically whether Europe is an expensive destination for Canadians, the great majority agreed that it is. Comments specifically addressed the costly airfare to get to Europe and the expenses incurred for lodging and dining once there.

*Expensive...especially in England, Germany, France...not the southern countries so much.*

*I can't wait until they put together the types of tours they do in Mexico and Cuba that are more affordable. I am dreaming, of course, but for like \$1,999 if you could get two weeks, air, hotel, meals...*

Participants were generally aware of the increase in the value of the euro relative to the Canadian dollar and believed that Europe is now even more expensive as a result. Both non-visitors and past visitors appeared to believe that with a little effort it would be possible to keep costs down during a trip to Europe. No one, however, went so far as to say that travel to Europe could be made *inexpensive* in this manner.

## QUALITY OF SERVICES

Participants in the Canadian groups had little to say about the quality of service in Europe. Generally, they expected the service to be good, although some suggested that it would probably be inconsistent across Europe and that in out-of-the-way places language and communication problems might affect the quality of service.

*I would say yes because I have the impression that hotel schools in Europe are the best.*

*I can't generalize. It's not even a question of country or regional level; it is really a matter of the individuals.*

*If they speak English, yes. In the smaller towns, I am not sure.*

The most commonly mentioned places where poor service might be encountered were major tourist centers overflowing with tourists, and Eastern Europe. In major tourist areas, Canadians expect that dishonest staff in restaurants might overcharge them or treat them poorly. In Paris, specifically, many expect to encounter unpleasant and bad-tempered locals and service industry professionals. Regarding Eastern Europe, Canadian participants were generally uncertain about the quality of service and spoke of the difficulty of dealing with government employees, the frustration of trying to get a visa to enter Eastern European countries, and the locals' general distrust of foreigners.

*There are some places where they are sick of seeing tourists. What comes to mind for me is Venice and Paris...you have to always pay attention, be vigilant. There is always a trap somewhere.*

*In Paris the servers are really irritating. In the South they are much nicer.*

*We met a person taking the train through the Czech Republic to Hungary, and the guards made them get off the train and they had to wait something like four hours and pay 250 euros just for some sort of a pass to travel through the country.*

*I went to Kiev...there was still a mistrust of tourists because they see us as people who have a lot of money and so they are going to try to exploit us.*

Younger travelers were less likely to express opinions—both good and bad—about quality of service, probably because their expectations when traveling are typically very tightly related to budget. A young person who mostly stays in youth hostels or budget hotels is likely to be more concerned with price than service.

English-speaking participants clearly believed that the quality of service is directly related to identifying oneself as a Canadian and making sure not to be mistaken for an American. They were of the opinion that Europeans are not fond of Americans and that Canadians are likely to be treated better wherever they go in Europe.

*I think when traveling in Europe there are definite advantages to making it known you are Canadian and not American.*

*They are much more prone to rip you off if they think you are American.*

*In certain countries, like in Holland, they naturally have good disposition towards us because of our role over there in the war.*

*For some reason they don't like Americans...they don't think they are very intelligent. That is my perception.*

While the English speakers believed that being mistaken for an American would diminish the quality of service they would receive, many of the French-speaking non-visitors believed they would have trouble making themselves understood in France and felt that they would be mocked because of their “provincial” accents. Past visitors did not appear to be as concerned as non-visitors about this issue.

## SAFETY

The matter of safety did not come up unprompted in the Canadian focus groups. Moreover, when asked about it, few participants expressed safety concerns about traveling to Europe. Some did comment that there are dangerous places in Europe but said that every country and city has its *hot spots*, and it is a matter of being careful, rather than of avoiding Europe altogether. A very small number of participants in Toronto—mostly older ones—referred to petty theft and the dangers for women and older people.

*I tend to think of it as safe...I never really question it.*

*I am sure there are neighborhoods, areas, where it isn't safe to go. I imagine tourists don't go to those types of places.*

*Italy...People get their purses snatched, knocked down.*

*A woman of 75 had her purse stolen...they knocked her down, they took her purse, threw it in the garbage and just took all the money, and so you have to be careful.*

## ACCESSIBILITY

Europe is seen as an accessible destination—in the sense that it is both easy to reach from Canada and easy to get around in. For some, non-visitors in particular, cost is the main factor limiting accessibility.

*The flight there and the time is not really a big deal. I just hope for a plane that is roomy!*

*I find it just pretty easy to travel amongst all the countries...By bus, train, it just seems relatively seamless...You think of just trying to go to the States and you are lined up for two and a half hours. It just seems a lot easier to move around Europe.*

*That's what's great about traveling there. In no time at all you can go from one culture to another.*

## SHOPPING

The number of participants who associated Europe with shopping was quite small. However, some of the women in the groups did associate Europe with the

opportunity to shop and bring back unique items. They spoke about antiques, fashion, and art in particular.

*Maybe some shopping to find something different.*

*When I am shopping, I am looking for oil paintings too, something unusual that you can't get here.*

## OUTDOOR ACTIVITIES

Participants' unprompted associations with Europe included *biking, snowboarding, sport, swimming, and tennis*. When asked more specifically to speak about Europe as a tourist destination, only two participants, both of them young, mentioned winter sports and professed an interest in visiting the Alps to ski or snowboard. When prompted on the subject of outdoor activities, a handful of the older participants talked about walking or cycling in Europe, although, unlike the younger skiers and snowboarders, they did not say they would travel to Europe specifically for outdoor activities.

## CITY VERSUS COUNTRYSIDE

When talking about Europe, Canadian focus group participants more frequently spoke of major European cities than they did of the countryside or small villages. Past visitors frequently made reference to particular cities they had visited, such as London, Paris, and Kiev. Some non-visitors acknowledged that they would first visit cities, then visit the countryside and more out-of-the-way places.

## ADJECTIVES USED TO DESCRIBE EUROPE

We asked participants to write down adjectives that they believed describe Europe. Responses—although not always adjectives—led to discussions that yielded further adjectives and insights about how Canadians perceive Europe. Some of the adjectives that were mentioned included *exciting, liberated, warm, wise, vibrant, surprising, picturesque, multicultural, historical, enriching, dynamic, colorful, and beautiful*.

Following is an analysis of some of the most frequently discussed perspectives. In general, participants in the Toronto groups gave more and richer feedback to this exercise than did their Montreal-based counterparts, who responded more enthusiastically to a later question focusing on sensory perceptions.<sup>17</sup>

As in the exercise addressing top-of-mind associations with Europe, when asked to write down adjectives describing Europe, participants were very focused on the

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<sup>17</sup> A more extensive list of the adjectives written down by participants can be found in Appendix I.

historical qualities of Europe. Participants chose a variety of adjectives that conveyed this focus, including *historical*, *old*, *old churches*, *older buildings*, and *ancient*.

*I put “old” because we are talking about countries that it’s been a long time that they have existed compared to us. We’re the New World; they are the cradle of civilization.*

*I put “ancient.” You know, things from the year 1100, 1200. We weren’t even around yet; that’s really it for me.*

*I think of older buildings. Structures that are old. Old churches. Fantastic churches over there. I think I could probably spend weeks over there studying it all.*

Participants in both cities—and non-visitors in particular—also reconfirmed the importance of Europe’s culture. They wrote adjectives such as *cultured*, *refined*, *classic*, *cultural*, and *culturally rich*. Written responses also included words that portrayed the culture across Europe—and Europe in general—as being rich and varied. They selected words such as *multicultural*, *diverse*, and *different*.

In each of the groups, a number of participants simply used the adjective *beautiful* to describe Europe. When asked to elaborate, discussion focused on the beautiful natural and man-made attractions that define the image that many Canadians have of Europe.

*Beautiful—I picture in my head the landscapes, beautiful buildings, architecture. Again, it’s beautiful both inside and outside the cities. The people are beautiful.*

*Picturesque. I wrote “very very very beautiful,” because it is so different.*

A number of participants in Toronto commented that Europe is *busy*, *dense*, and *crowded*. Many of them held the perception that in the summer Europe is packed with tourists. Still others commented on the density of the population, comparing Europe’s comparatively small spaces with Canada’s vast territories.

A number of participants chose adjectives that described Europe as a place for discovery and new experiences and said that traveling in Europe is *enriching*.

*New experiences, communicating, learning, looking and admiring, emotional.*

*Yes, [enriching] for the variety of cultures. As we were saying just a few moments ago, the countries are very close together and in one day you can cross them; even in the same country, you can see lots of differences in the culture.*

After discussing the adjectives that participants wrote down on their exercise sheets, the moderator probed some preselected adjectives. These adjectives—*lively*, *exciting*, *trendy*, *fashionable*, *cutting-edge*, and *avant-garde*—were selected with the intent of

testing whether positioning Europe in a more modern, nontraditional way would be consistent with how it is perceived by Canadian consumers.

**Exciting and lively.** Participants believed Europe is *exciting, surprising, interesting, and eye-opening*. The word *exciting* in particular evoked a strong response. The word *lively* also described Europe to many participants. Although it was not used by participants without prompting, when prompted they enthusiastically embraced it and explained that they see the people of Europe as *passionate* and *vibrant* and *excited* about different aspects of their lives.

*People there are passionate. We are so boring. I wish we were half as excited about life as they are.*

*Colorful—vibrant, colorful, alive. They know how to live, so the people are very vibrant.*

*They live in the moment. They seem to be young at heart. Even the old people.*

**Trendy and fashionable.** The words *trendy* and *fashionable* resonated to a limited extent—primarily with younger travelers. In both Montreal and Toronto, participants related these words to fashion, fashionable people, and nightlife.

*It is trendy. There are a lot of styles from Italy and so on.*

*You think Paris, you think fashion, you think Milan...it's places like that.*

*You only have to look at women's high heels. They had the spiked heel for a long time in France before we got it.*

**Cutting-edge and avant-garde.** When asked whether Europe was *cutting-edge* or *avant-garde*, generally the response was *no* as the terms pertain to technology and *yes* as they pertain to fashion and design. Past visitors provided more feedback on these adjectives than non-visitors, who were unsure of the extent to which they might apply to Europe.

*No—it isn't cutting-edge. Over there they've got time; they are laid back. If you want to be cutting-edge, then you have to work 7 days a week.*

*It is fashionable, but everyone seems to wonder why the best technologies seem to come out of the United States and Japan. It is because they are busy busting their butts working all the time and...[in Europe] they are having a cup of tea.*

*I was in Milan when I studied, and the fashion...well it is an avant-gardist center. Red and black clothing was the fashion in Milan, and you saw that in the chic store windows. Sure, red and black came to America, but it was 10 or 15 years later. Now it is all over the place.*

*In Germany they have things that are really, really modern. Very avant-garde also.*

## SENSORY ASSOCIATIONS

After discussing the adjectives that participants would use to describe Europe, we asked participants what sensory associations they make with Europe. These focused on the tastes, sounds, colors, and smells that participants said they would expect to encounter during a trip to Europe.

**Tastes.** Considering the strong interest Montreal participants expressed in food and gastronomy, it is not surprising that they expounded freely on the tastes they associate with Europe. In contrast, only one Toronto respondent spoke about food, saying specifically that she expected to encounter *spicy food*.

*I imagine asparagus, chives, little bites of things.*

*I love to eat and to eat well, and I love tasting different things. The French, from what we see on TV...they have recipes that have a different touch and make us taste foods in a way that is different from what is usual for us.*

*For me it would be pesto...pesto in Genoa.*

*It sounds cliché, but there are the cheeses in France. I really like cheeses.*

**Sounds.** The question probing the types of sounds Canadians would associate with Europe elicited a variety of responses, including sounds from both urban and rural settings. In Toronto, church bells were mentioned by several participants.

*I imagine Paris...they are mouthing off and there is a lot of honking.*

*Cars whizzing, little mopeds.*

*I only hear the ocean, but during the daytime there are all the people who are there too.*

*One of the things that struck me is the many churches and the different sounds...the bells.*

*Big Ben.*

One sound that would be distinctly European in the minds of Canadian participants is that of people having animated discussions and speaking European languages.

*The languages...“French-from-France”...it puts you in a whole other world.*

*It is very loud...Italians and Greeks...they are loud people. When they are talking, you think they are fighting and they are just talking!*

*The French accent is very pronounced.*

*The Marseillais accent, it's almost like they're singing.*

**Colors.** When asked about the colors they associate with Europe, participants typically associated colors with specific destinations or regions, rather than with Europe as a whole. The colors they named were generally very bright and vibrant.

*In Greece it would be blue and white.*

*Spain is yellow and orange.*

*Green—for Ireland*

*I think of Venice. There is a little island called Burano where every house is a different color...yellow, green, red...it was just amazing.*

**Smells.** Participants had more difficulty associating specific smells with Europe than they did tastes, sounds, or colors. The small number of smells that were brought up were diverse in nature, ranging from *coffee* to *lavender in Provence* to the *dampness* in England.

## CHANGING PERCEPTIONS

As in the United States, participants were asked if their perceptions of Europe had changed or evolved in recent years. Although the initial reaction to the question was usually to say that very little had changed, further probing suggested that many Canadian participants' perceptions had in fact changed somewhat. Changes in the way Canadians perceive Europe were most frequently related to issues of safety or were related to globalization and the evolving European Union.

### SAFETY

A number of Canadian participants said that they find Europe to be a less safe destination than it was a few years ago. However, their attitudes about safety were quite different from those of the American focus group participants. While American participants spoke predominantly about a fear of traveling to Europe and visiting its major cities, Canadian participants clearly stated that they were not afraid to travel, and that the safety-related problems in Europe are generally more of a problem for locals than for tourists.

*No...I think it has gotten worse. It is not as safe.*

*It is not as safe as it used to be...but the problems mostly affect people who live there.*

*I hear little things, but it hasn't really fazed me much...unless a country breaks down and has a war for whatever reason, it is not going to change my status.*

In some of the groups, participants spoke of problems in France and Spain related to political situations. Specifically, they spoke about the Basque separatists and the tensions surrounding rulings affecting the large Muslim population in France.<sup>18</sup>

## IMPACT OF THE EUROPEAN UNION AND GLOBALIZATION

A number of participants noted that Europe has undergone changes at the political and economic levels as a result of the creation of the European Union. Specifically, they commented on the economic development that has been spurred by the formation of the European Union, sometimes speaking about specific countries that have evolved economically in recent years.

*I look at the first trip and the last trip that I took there, and as far as economics go, I think it has improved tremendously.*

*At one time, when I first went to Greece, it was very poor, but now they are fixing it up more.*

*To get into the European Union, the countries have to follow a lot of rules that bring up the standard of living...politically Europe has been developing.*

The advent of the euro has also changed Canadians' perceptions of Europe. The euro is perceived as facilitating travel among the different European countries and to have contributed to economic development.

*The euro is making it easier. I was just there recently for three months, and we went to a lot of countries. Because of the euro, we only had to exchange money for pounds and the Swiss franc. It made it so much simpler.*

*The new currency groups countries together and simplifies the problems they were having.*

*All of those countries are better off since the euro.*

Discussing the euro also prompted participants to speak about the exchange rate. Participants mentioned that the euro has been gaining ground against other currencies, specifically the U.S. dollar.

*I think since the euro took over it went from 89 cents American to like \$1.30 or \$1.20 American, or so.*

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<sup>18</sup> The groups took place prior to the terrorist bombings in Madrid.

*The euro is getting better all the time, and it is gaining on the U.S. dollar.*

## EASTERN EUROPE

The subject of changing perceptions as the result of the opening of Eastern Europe did not emerge unprompted during the Canadian groups. When prompted on the subject, some participants, particularly non-visitors, had the impression that the region was now more accessible and freer.



## XII. MOTIVATIONS AND BARRIERS TO VISITING EUROPE AMONG CANADIAN TRAVELERS

### MOST APPEALING ASPECTS OF EUROPE

What most appeals to Canadians about traveling to Europe is very closely aligned to the images and perceptions they have of Europe as a travel destination. Canadians would most like to travel to Europe for its rich history, the opportunity to discover how the locals live and to appreciate the differences between Canadian and European culture, and the food and wine. The arts and the scenery were also mentioned by a number of focus group participants.

#### HISTORY

History and historical features are among the most compelling aspects of Europe as a vacation destination for Canadians. Not only have they read and learned about European history, it is something that makes Europe very different from Canada. Participants talked about the comparatively long history of Europe's cultures, cities, and countries, and also about the impact history has had on the way Europe looks.

*To see the history that we learned about in school. Everyone has seen pictures of the Sistine Chapel, but actually to be there...it is incredible.*

*I would like to see some of the old World War II monuments, all the stuff that I have dreamed about since I was a kid.*

*In Antwerp, to go down by the water and see the big clock dedicated to the Canadians who freed up a particular area—to me those are some of the reasons I would like to go to Europe.*

*The history of philosophy in Greece...the Parthenon.*

*The varied architecture that marks the history of the different countries.*

We asked participants whether they believed the historical or the contemporary aspects of Europe to be most appealing. More participants said historical elements than said contemporary elements; however, some said both aspects of Europe are equally appealing.

Canadians perceive Europe's history as being something that permeates and helps define the European lifestyle—narrow, cobblestone streets affect not only the way Europe looks but also the types and sizes of cars that Europeans drive; centuries-old buildings are the setting for gatherings; and regional foods served in quaint towns and

villages are cooked according to recipes kept in the family for countless generations. This historical backdrop to modern-day living is enormously appealing to Canadians.

## DISCOVERING THE LOCAL WAY OF LIFE

Canadians are enthralled by the idea of discovering the way that Europeans live and the ways in which life in Europe differs from life in Canada. Participants said that they view a trip to Europe as an excellent opportunity to observe and learn about local lifestyles. In many cases, Canadians—particularly younger and middle-aged travelers—are driven by a desire to enrich their knowledge of the world and broaden their horizons.

*Like I said before, it's to see what it is like over there, what the social life is like...what is different about it.*

*The whole aspect of getting up in the morning and having breakfast and the difference in the foods and the way they do things and the way they observe certain tea times.*

*At certain places their dinner is at midnight...I am hungry at 5:30 pm, so it is a different way of life. You want to explore and experiment with these differences.*

*Dépaysement—it's different from North America.*

A number of Canadian participants specifically referenced getting beyond the tourist areas, eating where locals eat, and speaking with the locals rather than with other tourists. Most participants believed that a local contact—such as friends or family living in Europe, or new friends made while traveling—is a great way to get on the “inside track” and experience places that other travelers might not ever find.

*Try to understand the different cultures. Find a little hole-in-the-wall “Ma and Pa” restaurant and sit down. It is amazing how you'll find somebody that you might be able to speak some English with.*

*Fancy restaurants, sure they're fun...but you won't taste the real local food. If you meet people there, they'll take you to little restaurants where you will taste the real cuisine, discover typical dishes. For me that sort of thing is very important.*

*It would be nice as a tourist to have family or friends living in the country so that they could give you a better insight of their countries.*

*When I find myself in another culture, I try to integrate myself. I try to take on the rhythm of the place. The ultimate goal is...eventually to pass for a local.*

For many participants, the fact that Europe offers so many different environments, languages, and experiences in a small space is a draw. They want to

hear (and, in the case of more adventurous travelers, to speak) foreign languages, observe the differences in the cultures across Europe, and more.

*The multitude of different countries, cultures, styles, clothing, food, all to be discovered in a smaller space.*

*Really and truly you cross a border it's a different language. It doesn't get much different than that.*

*I find [different languages] fun...you look at your book and you're like "una nocha" trying to speak to them and it makes it an experience.*

A number of participants said they were drawn to the *free, less-inhibited* nature of Europe and Europeans. They want to be in an environment with outgoing people, where the atmosphere is fun and relaxed.

*I think of Europe as a place where one can be anything...freedom.*

*To be surprised and to be surprising also.*

## GASTRONOMY

Although Canadians admit that there is an increasingly impressive selection of high-quality, international dining opportunities in Canada, most are still excited by the opportunity to experience the flavors of Europe in their native setting. They believe that there are new dishes to taste and look forward to a range of dining experiences—from sampling specialty items like foie gras and local wines to tasting typical dishes at small, no-fuss restaurants frequented by locals.

*There might be local flavors that we really haven't discovered here yet.*

*On my first trip [to Europe] the gastronomy really struck me.*

*For me it would be the wine, the cheese...probably my trip will be hard on the liver with the foie gras, the pâtés...*

*Not going to the touristy areas but focusing on the local restaurants would be really cool.*

## ARTS AND CULTURE

As was the case in the Canadian travel trade research, only a few Canadian participants mentioned the museums, theatres, or the arts when asked what would most strongly motivate them to visit Europe. The participants who did say they would be motivated by the arts were typically older non-visitors. This is not to say that Canadians do not enjoy visiting museums when traveling abroad. During the

focus groups, the appeal of museums and the arts may have simply been overshadowed by the great importance placed on history and local culture.

*My goal would be to go and listen to the music.*

*Museums—right now I am reading about the Mayan Indians in Mexico and learning about how the Europeans stole all these artifacts, so if I don't go to Mexico I have to go over to England to see all of that.*

*The culture, in all of its forms—music, dance, theatre, and literature.*

## SCENIC BEAUTY

Comments made throughout each of the groups clearly illustrate that scenery plays an important role in luring Canadians to Europe.

*It is a festival for the eyes.*

*It's the aesthetics that inspire me. It's like it renews my imagination. I like what it does, it inspires me.*

*The height of the mountains, the millions of tulips in Holland.*

## LEAST APPEALING ASPECTS OF EUROPE

When asked about the least appealing aspects of Europe, high cost consistently led the list, followed by the time required to travel there. A smaller number of Canadian focus group participants indicated that language barriers and safety considerations negatively affect the appeal of some parts of Europe. Fewer still said that maintaining North American standards of hygiene would be difficult or commented that obtaining visas for travel to some destinations—particularly in Eastern Europe—might be complicated.

### COST

Canadian participants said that the cost of traveling limits their travel to Europe. This view was particularly strong among non-visitors.

*The cost...is stopping me from going there. If it weren't for that, I would go right away!*

*It is not [the cost of] getting there, but the hotel rooms, that type of thing. You can get there cheaply; it is less than going to Vancouver, that is for sure.*

## TIME

Canadian participants generally believed that a trip to Europe requires a significant investment of time and perceived this to be a deterrent to visiting. Understandably, this sentiment is strongest among Canadians who are employed and have a limited amount of vacation time each year. Most focus group participants believed that, to be “worthwhile,” one would need to spend more than a week in Europe.

*It's the time. It's a minimum of three weeks, ideally a month, because there are just too many things to see.*

*It takes so long to get there, and with the price it costs for the plane ticket alone, you have to have a little time to visit.*

*It takes longer than a week to get used to the time and adjust. That is what I find anyways.*

*The jet lag...we haven't talked about that yet, but my body doesn't adjust the way it used to when I was 20. It takes me longer, so my trip has to be longer if I am going to be relaxed.*

## LANGUAGE

Non-visitors in particular were concerned they would not be understood when trying to speak to the locals. Some of the women in the Toronto non-visitor group felt the difficulty in communicating could affect their personal safety because it might be harder to protect themselves from the unwanted advances of local men.

*For me [the least appealing aspect] would be language. It can be pretty frustrating.*

*Languages...sometimes it is tough when you are traveling alone and you can get yourself into deep trouble not knowing the languages.*

*Especially if you are a woman traveling alone. Then it's got that double whammy going.*

French speakers made numerous references to the differences between the French spoken in Europe and that spoken in Quebec. Non-visitors in particular were afraid that communicating in French would be difficult because of the different accents, words, and phrases. Indeed, many had heard stories from friends and relatives that fueled the belief that communicating would be difficult. Furthermore, some were afraid they would be looked down upon for the different way that they speak French.

*The accent. I like being able to make myself understood when I go somewhere. I don't like always having people ask me what? What? What? We have a type of slang that they don't necessarily understand.*

*Even just trying to get some butter. My son was saying, “I would like some butter on my bread,” and the person in the restaurant didn’t understand what he wanted. “Ah! It’s butter that you want!” [in a French-from-France accent, rather than a Quebecois accent]. Well yes, that’s what I want! It’s pretty straightforward!*

*A girl I knew went to France twice. Because of her accent she was seen as a habitant—a habitant from Quebec because they had difficulty understanding her. She was having a hard time understanding them too, and she too was giving them flak—she would say, “Ah you French-from-France people!”*

## SAFETY

A small number of participants indicated that social unrest and petty thievery are unappealing aspects of traveling to certain areas of Europe. They spoke about tourists being targets for pickpockets in popular tourist centers and said they find some areas of Europe to be politically unstable. Canadians believe that they can avoid most unpleasant encounters by being “smart” about where they travel in Europe, avoiding dangerous parts of large cities and trying to blend in. Almost none of the focus group participants in Canada said they were afraid to travel to Europe because of safety concerns.

*You’re standing out as a mark...that can be a deterrent when you are carrying cash or credit cards. You are dressed differently, so you are easy to spot.*

*I would be more inclined to visit countries where everything is going well—places we don’t hear about on the news every day. Like the Ukraine, like Russia—things are shaking there and I wouldn’t be interested in going there.*

*I flew the week after the terror attacks, so I am not worried about that. Traveling [to Europe] is probably even safer now than it was.*

## CHANGING INTEREST IN VISITING EUROPE

Canadians remain greatly enthusiastic about traveling to Europe. In contrast to participants in the American focus groups, none of the Canadian focus group participants indicated that fears about safety or concerns about political tensions are holding them back from visiting Europe. In fact, all but one Toronto focus group participant, and about two-thirds of Montreal participants, indicated that they are more likely to travel to Europe now than they were a few years ago. Reasons for this are mostly personal, such as having more free time now than a few years ago or having come across new information that piqued their interest. Some older non-visitors explained that they want to travel to Europe “before they die.”

The remaining Montreal participants—those who are not more inclined to visit Europe than they were a few years ago—all said that their inclination to travel to Europe had not changed over the period. Only one respondent—a past visitor from Toronto—clearly articulated that he was less likely to visit Europe now than he was two or three years ago. He attributed this change to having other priorities at the present time.



## XIII. MARKETING EUROPE IN CANADA

### SHOULD EUROPE BE MARKETED AS A WHOLE?

As in the United States, we asked participants whether they would be more likely to respond to an advertisement that featured Europe as a whole, one that featured a region of Europe, or one that featured a single European country. Slightly more than half of Canadian participants favored the idea of promoting Europe as a series of regions. Roughly equal numbers of participants favored each of the other two approaches.

Participants who favored a regional approach to promoting Europe believed it would showcase Europe's diversity while still offering enough detail to be compelling. They said that in comparison with a "Europe as a whole" approach, regional advertisements would provide information on a more manageable scale. They also said that at any given time they might be more interested in visiting one region than another, and that they would be more likely to pay attention to advertising for the regions that most interested them. They suggested that regions could be based on geographic proximity or similarities in the tourism product—such as *wine-producing countries*.

Participants who favored the approach of marketing Europe as a series of single countries generally did so because it would provide more detailed information than would a regional approach. This approach was more strongly supported by past visitors than it was by non-visitors. Many past visitors expressed the view that they had already had broad exposure to Europe and were interested in getting to know particular countries in greater detail.

The idea of promoting Europe as a whole appealed more strongly to non-visitors than to past visitors. Participants who preferred this approach were interested in obtaining a greater breadth of information than those interested in advertisements featuring a region or a single country in Europe. Many of these participants mentioned that they would be likely to visit multiple countries on a single vacation and that promoting Europe as a whole would support this manner of travel.

### COMMON THEMES ACROSS EUROPE

Participants generally perceived Europe's tourist product as diverse, although a number of them said that ease of travel is a common factor across European countries. Specifically, they said that Europe is *accessible* and can be traversed *on a bicycle, by train, or by car*. Most responses, however, focused on unifying attributes related to economics and politics.

*It is the same continent; they have the same economy and are integrated politically.*

*The economy unites [the countries of Europe] while the cultures set them apart.*

Although Europe's many countries are culturally diverse and its people speak many different languages, these multicultural differences are actually perceived as a unifying characteristic of Europe.

*I think it is that it's transcultural. You come across many different cultures in those countries.*

*The commonality is the different languages.*

## THE REGIONS OF EUROPE

When asked how they would group European countries into regions, Canadian participants—particularly non-visitors to Europe—struggled and said their lack of knowledge of geography made the exercise difficult. The suggestion that they think beyond geography to other traits that might unite a region—such as similar cultures—helped them to an extent. Regions that were most frequently identified were similar to those identified by Canadian travel trade respondents and included the British Isles, Scandinavia, Southern Europe, and Eastern Europe. Various “Western” European groupings were also suggested

**The British Isles.** England, Ireland, Scotland, and sometimes Wales were grouped together by a number of participants, some of whom referred to this region as *the British Isles* while others referred to it as *the United Kingdom*. Not surprisingly, given the Anglophone culture and history of Toronto, the region was more top of mind in Toronto than in Montreal.

When participants were asked to describe the image they have of the British Isles, responses varied. On the one hand, the region is perceived as being scenic—*the countryside is lush* and there are *valleys and green*. On the other hand, there is a strong association with *rain* and *dampness*, and some see it as *dreary*, *overcast*, and *wet*. Other comments included that it is easy to get around and that it is similar to Canada—in terms of the people, the food, and the language. English-speaking participants noted the fact that English is spoken in the region.

**Scandinavia.** A number of participants identified *Scandinavia* or the *Nordic countries* as a grouping. This region—most frequently seen to include Finland, Sweden, and Norway—is recognized for *snow*, *cold*, and *freezing temperatures*. Canadian participants said that people from Scandinavia are *respectful* and *care about the environment*, and believed that the countries are *clean* and *socially advanced*.

**Southern Europe.** Many people grouped together countries that they perceived to be in *Southern Europe* or the *Mediterranean*—terms that were used interchangeably. Participants most frequently included Spain, Portugal, Italy, Greece, and sometimes the south of France or Turkey in this region. Comments about the region were entirely positive, with the most defining features being *warm, good weather, good beaches,* and lots of *sunshine*. The local people also figure prominently in the image Canadians have of Southern Europe—they expect them to look slightly different, with *darker hair* and *darker eyes*; to be *relaxed, happy,* and *passionate*; and to have a certain *joie de vivre*. Canadian participants see Southern Europe as a place they can go to enjoy themselves with *good food, lots of wine,* and *good nightlife*.

**Eastern Europe.** Most participants agreed that countries in *Eastern Europe* could be grouped together. Countries frequently mentioned as being part of the region include the Czech Republic, Hungary, Poland, Slovakia, Romania, and Yugoslavia. Canadian participants' lack of knowledge of Eastern Europe was evidenced by the fact that they frequently spoke about *Czechoslovakia* and *Yugoslavia*—these names were used at least as often as the current official names of countries in the region.

The image that Canadian participants had of Eastern Europe was generally quite negative. They saw it as *less accessible than the rest of Europe, cold,* and *dark*. They also believed that many years of communist rule left an impact that can still be seen and felt—in the people, the buildings, and an atmosphere that is *restricted* and *not as modern,* even today.

**Western Europe.** Although few Canadian focus group participants used the term *Western Europe*, many suggested groupings of countries in the western part of Europe. These groupings most frequently included France, Germany, Austria, Switzerland, and Holland. Participants described these countries as *economically strong* and *crowded and industrial*. A few participants referred to the Alps and to skiing.

Many Montreal non-visitors identified a French-speaking subregion of Western Europe. Nearly all of these participants grouped France with another French-speaking country, usually Belgium, because of the *French-language connection*. This association was not frequently made by participants in the English-speaking groups.

## REACTIONS TO SELECTED IMAGES OF EUROPE

As a final exercise, we asked focus group participants to consider some images and slogans presenting Europe as a vacation destination. For consistency, the images we used were identical to those presented in groups in the United States. As in the United States, respondents were told that the images represented concepts rather

than a finished advertising campaign. In the Montreal groups, approximate French-language translations of the slogans were used with the images.<sup>19</sup>

Participants quickly recognized that the images were an attempt to present Europe in a more modern light. They generally agreed that modern imagery could appeal to them to some extent, but added that it would not motivate them as strongly as a more traditional approach focused on historical Europe.

Participants in all of the groups were most drawn to the elements within the images that represented the historical and older side of Europe—such as the photo frame (from Art + architecture), the bed (from Fashion + Fun), the cobblestones (from It’s the American century...). These “older” touches helped define the images as European and set them apart from what otherwise could be advertising for Toronto, Montreal, New York, or any other Canadian or American city.

Participants indicated that if a modern approach to marketing Europe were to be pursued, the images would need to be more compelling than the ones shown. They seemed confused by why Europe would be promoted with images such as these when, in their eyes, they did not capture the essence of Europe. Further, they said the images did not convey the messages that they most wanted to hear and did not motivate them to travel to Europe.

**The gateway to Europe Updated.** Reactions to this image were generally unfavorable. Many participants questioned the subject of the image, and were unsure of where it might be found. Some even wondered whether the structure actually exists and, if so, whether it is actually located in Europe. Few participants believed that this image corresponded to the perception they held of Europe, primarily because the image is ultra-modern and does not incorporate any historical buildings or elements.

*I would look at that without knowing whether or not it is Europe.*

*Whatever that structure is, it just doesn’t look like it belongs in Europe.*

*To me it seems very Americanized. For me, Europe is old countries. Show us something that makes us think of old countries.*

*It looks like the gateway to California.*

Few said the image would entice them to travel to Europe. They would be motivated more by images of older buildings than by the one shown.

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<sup>19</sup> The English-language version of the images is contained in Appendix H.

*I don't have a problem with the fact that it is modern, but it is not for modernity that you go there.*

*I perceive Europe as castles. I am going to go to Europe to see castles. I am not going to go there to see modern architecture.*

*I like what Bruce said about the castles. If you want to see a piece of glass and metal, look out the window.*

Although the overall reactions were not favorable, the image elicited some positive remarks for the use of bright colors and, in a very limited number of cases, the modern and different approach.

*The contrast of colors, the pink, the blue. I think it is nice.*

*The photo is beautiful; it's just that for me it isn't representative of Europe.*

**Wine + dine.** The notion of “wine and dine” as it relates to Europe appealed strongly, especially to Montreal-based participants. The image, however, failed to excite focus group participants. They explained that it did not convey “Europe,” the types of food they would enjoy eating in Europe, or the type of environment they would choose to experience.

*Wine and gastronomy and you eat pizza?*

*It looks like a dating Web site...or a pizza parlor announcement.*

*Pizza wouldn't be my choice of food.*

As with the first image, some participants remarked favorably about the use of bright color. Even those who found the image *pretty to look at*, however, said it would not motivate them to visit Europe. If the concept of food and gastronomy were to be used in the advertising, they would like to see more wine, more traditional settings, and less Americanized food.

*I like the concept, but why couldn't they be sitting in a piazza?*

*If you had a setting like that—two people sitting on a patio—Eiffel tower in the background, enjoying food together, very colorful, maybe some wine, that would throw it all together and make me say “OK.”*

*The aspect of conviviality. I mean good wine, a good spread of food, happy people around the table.*

*I think if they zoom out a little and show me a cobblestone walkway and old-looking stuff.*

**Art + architecture.** In general, Canadian focus group participants did not like this image. They felt there was a disconnect between the image and the slogan and that the picture trivialized a subject that otherwise would have interested them.

*Art and architecture—yes, the words speak to me and bells go off, but I really don't like the image.*

*When I think of Europe, I do think of architecture, of art, but this could be an ad for lipstick.*

*There is no relationship to architecture.*

*If you are trying to describe art and architecture, which I do think of when I think of Europe, then I don't get it.*

The slogan “Art + architecture” elicited some positive comments from participants interested in the concept of art and architecture. Other participants liked the fact that the woman looks European and that the frame featured in the image—being older in style—also looks European. In general, however, participants believed that more traditionally European elements needed to be featured in this advertising in order for it to appeal to them.

**Fashion + Fun.** Initially, this image attracted positive comments from a few of the participants—particularly French speakers. Some felt the image fit, at least to some extent, with their perception of Europe because of the focus on fashion. They felt that the photo was eye-catching because of the subject matter—*sex sells*—and the bright colors.

*Fashion magazines from France, for instance. Yes, there is a certain reference to that for me, in the way the photo is taken...*

*With a pair of legs like that, yes, it catches your eye.*

*If you are looking through a magazine, one of the things that you are going to notice is the color.*

Others focused on the bed. They commented that the addition of the bed introduced an *older* element to the image, with a European look and feel.

*I like the headboard...it looks older.*

*The bed makes it look and feel really European.*

That said, only a small number of participants thought this image would make a good advertisement for Europe. Some found the concept to be more strongly related to France or Italy than to Europe in general because of its emphasis on fashion. Overall, the tone and message of the image fell short of making them want to go to

Europe. A few found the concept to be *tired* and more focused on fashion than on Europe. Participants suggested putting a window with a view of a typically European setting beside the bed to make the connection with Europe more obvious to the observer.

**It's the American century. But it's the European season.** This image, arguably the most traditional of the five shown to the groups, came closest to fitting the perceptions that Canadian focus group participants had of Europe. Again, they were attracted to the bright colors. The older elements featured in the image, the cobblestone street in particular, appealed strongly to participants.

*That is how I imagine Europe. Narrow streets. It has been a long time since it was built, and that was without modern urban planning...there is nowhere to park cars.*

*I like the cobblestone...the buildings look old...and I like what looks like a store beside it. That is really kind of typical. Yeah, I like that.*

*The width of the road, that's European, and I like the slogan.*

Participants in both cities responded favorably to the young couple, saying that they provided an interesting contrast between the “old” and the “young.” The fact that the couple pictured were kissing in the street also fit with their perception of Europe as *open* and *uninhibited*, and some participants commented that they liked the *romantic* angle.

Even though the slogan has an American focus, it was well received, particularly in Quebec. Nevertheless, it was generally agreed that it would be better if the word *American* were removed to better address the Canadian market.

*The American century...that's business, that's war. But the European season...if you want to enjoy a nice season, go to Europe.*

When asked whether the image would entice them to visit Europe, most participants said yes. Some suggested that the image could be made more effective with some small changes, like also featuring a table and a bottle of wine. Other suggestions included featuring older buildings than the ones pictured. Montreal participants said this would help distinguish the image as being of a European city rather than of the older areas of Montreal or Quebec City.

## SUGGESTED IMAGERY

After discussing the individual concept boards, we asked travelers what other images they would like to see in an advertisement for Europe. Discussion and suggestions mostly revolved around ways that the images presented during the groups

could be improved. The most common suggestion was that images used to promote Europe should always show elements of historical Europe, whether or not they also include aspects of contemporary Europe. For instance, Canadians would like to see images of old buildings, cobblestone streets, and historical icons as a backdrop for everyday life, social occasions, and typically European dishes. Layering the three most top-of-mind associations for Canadians when it comes to Europe—history, contemporary culture, and gastronomy—would make the images more representative of the perceptions Canadians have of Europe.

Participants in some of the groups also suggested that the images should feature more elegantly dressed people and fashionable décor. As an example, some commented that the couple in the street featured in the “It’s the American century...” image could be dressed in less American fashion—for instance, that the girl should be wearing a scarf and carrying a Louis Vuitton bag. As another example, in the “Fashion + Fun” image, participants suggested that the dress could be more elegant and that the bedspread was not a good choice because it looks outdated and unfashionable.

## **PART III: CONCLUSIONS AND RECOMMENDATIONS**



## XIV. HIGHLIGHTS

### POSITIONING EUROPE IN NORTH AMERICA

- ❑ Because Americans and Canadians hold remarkably similar perceptions of Europe as a vacation destination, it makes sense for the ETC to employ a common approach to branding Europe in the United States and Canada.
- ❑ Europe’s rich history, exceptional art and cultural attractions, distinct lifestyle, appealing gastronomy, and scenic beauty should constitute the core elements of the branding.
- ❑ The branding also needs to combat the factors that inhibit visitation—namely, concerns relating to welcome, cost/value, and safety. Travelers’ concerns about being welcome are especially problematic. Many American travelers—particularly potential first-time visitors to Europe—believe that Americans are looked down on by Europeans and are less than welcome in Europe.
- ❑ In shaping Europe’s brand “personality,” the ETC should strive to portray Europe as a *vibrant* destination—a positioning that resonates positively with American and Canadian travelers.
- ❑ Travelers are receptive to depicting Europe in a more cutting-edge way. However, the ETC should avoid extensive use of contemporary imagery. Americans and Canadians are much more interested in historical Europe than in contemporary Europe.
- ❑ That said, it is important for the ETC’s advertising, Web site, and other marketing communications to project a contemporary “look and feel.” The “look and feel” of the ETC’s marketing communications—over and above the content itself—can go a long way toward creating and maintaining a fresh, vital, and up-to-date image of Europe.
- ❑ In the United States, perceptions of Europe are fairly consistent from one region to another, meaning that the ETC can use essentially the same brand positioning in all regions. In Canada, however, the positioning needs to vary somewhat for English-speaking and French-speaking travelers.
- ❑ In developing sub-brands, the ETC should focus on younger travelers, first-time visitors, and repeat visitors. For younger travelers, the emphasis should be on fun, excitement, social interaction, and urban experiences. For first-time visitors, the emphasis should be on welcome, ease of travel, and ease of

communication. And for repeat visitors, the emphasis should be on “authentic” and off-the-beaten-track experiences.

## IMPLEMENTING THE POSITIONING

- ❑ The ETC should employ a two-pronged approach to implementing the brand positioning of Europe in North America, using consumer advertising to spark interest in visiting Europe and using its Web site to provide the detail that travelers desire for planning their trips.
- ❑ The ETC’s consumer advertising should focus on Europe as a whole rather than on regions or individual countries. On the other hand, it would make sense for the ETC’s Web site to portray Europe as a set of regions. By doing so, the ETC can present a more comprehensive and detailed image of Europe, categorize the Web site into logical subgroupings, and speak to consumers who want to visit multiple countries on a single trip.

## XV. POSITIONING EUROPE IN NORTH AMERICA

### EMPLOYING A COMMON APPROACH IN THE UNITED STATES AND CANADA

Americans and Canadians hold remarkably similar attitudes toward Europe as a vacation destination. Although differences exist, they tend to be minor.<sup>20</sup> Accordingly, we believe that it makes sense for the ETC to employ a comparable approach to branding Europe in the United States and Canada. This is not to say that the ETC should totally ignore differences between the American and Canadian markets. The differences need to be recognized, but the principal elements of the positioning can be the same for both countries.

In approaching the Canadian market, it is also important for the ETC to be sensitive to Canadians' strong desire to be treated as a distinct market—for instance, by being careful to use Canadian spelling in its promotional materials. At all costs, the ETC should avoid giving the appearance that it is simply applying to Canada an approach that was designed for the U.S. market.

### FORMULATING A POSITIONING STRATEGY

#### CORE ELEMENTS OF THE POSITIONING

We believe that it is extremely important for the positioning of Europe to be as simple and sharply focused as possible. Attempting to communicate too many things runs the risk of creating a muddled image in the minds of potential visitors. To that end, we recommend that the ETC focus on a small number of key attributes.

Specifically, we recommend that the ETC emphasize those facets of Europe that play the strongest role in motivating travelers to visit Europe. According to the trade and consumer research, these are Europe's rich history, exceptional art and cultural attractions, distinct lifestyle, appealing gastronomy, and outstanding scenic beauty.

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<sup>20</sup> The principal differences between the two markets are that Americans tend to be more concerned about safety and being welcomed, whereas Canadians tend to be more concerned about cost. Also, Americans tend to place a particularly strong emphasis on experiencing Europe's cultural offerings, whereas Canadians tend to place a particularly strong emphasis on experiencing Europe's contemporary lifestyle. With respect to marketing Europe, Americans are less receptive to a "Europe as a whole" approach than are Canadians. On the other hand, Americans are more enamored of the traditional iconic images of Europe—for example, the Eiffel Tower and Big Ben—than are Canadians.

**History.** As the research indicated, it is Europe's history and historical attractions more than anything else that draw Americans and Canadians to Europe and distinguish Europe from the United States and Canada. For that reason, we firmly believe a strong emphasis on history and historical attractions should form the principal underpinning of Europe's positioning.

**The arts.** Europe's outstanding cultural offerings—museums, galleries, music performances, theater, and so on—are another strong draw for American and Canadian travelers. Accordingly, the arts should also feature prominently in Europe's positioning.

**Lifestyle.** American and Canadian travelers are also attracted to Europe by the opportunity to observe and experience the way in which Europeans live their lives. They are particularly intrigued by the differences between North American and European lifestyles. As such, lifestyle differences should constitute another important element of the positioning. Moreover, a focus on lifestyle differences offers a potentially good way of adding a contemporary dimension to the image of Europe.

**Gastronomy.** Europe's gastronomy is another important enticement for Americans and Canadians. As the research indicated, travelers are inclined to speak enthusiastically about the delights of Europe's varied cuisines, outstanding wines, and unique dining experiences. They are also drawn to the relaxed and unhurried manner in which Europeans tend to approach dining. Consequently, gastronomy should constitute yet another important element of the positioning.

**Scenic beauty.** Scenic beauty is an important criterion for Americans and Canadians in selecting destinations for their vacation/pleasure travel. Moreover, as the research showed, Europe is strongly associated with scenic beauty—in its rural landscapes, its small towns and villages, as well as its large cities. Thus, Europe's scenic beauty should also play a central role in the positioning of Europe as a tourist destination.

**Diversity.** Members of the trade and consumers alike consider Europe's diversity to be one of its principal assets. In contrast to the United States and Canada, Europe offers a vast array of cultures, languages, people, and foods in close proximity to one another. Accordingly, diversity should constitute yet another core element of Europe's positioning.

## SUPPORTING ELEMENTS

We firmly believe that the positioning of Europe should center primarily on the positive attributes of Europe as a vacation destination. Nevertheless, it is also important to address significant barriers to visitation as they arise. Currently, the principal barriers relate to sense of welcome, value, and safety.

**Sense of welcome.** Sense of welcome is an issue that relates primarily to Americans. It is rooted in part in the political tensions stemming from the war in Iraq, but it goes far beyond the tensions in the Middle East. We were dismayed to learn the extent to which American travelers—particularly potential first-time travelers to Europe—believe that Americans are looked down on by Europeans and are less than welcome in Europe. This is a situation that badly needs to be corrected if Europe is to continue to grow the market. We encourage the ETC to confront the issue head-on. Americans need to be reassured that they are welcome.

**Value.** Europe is perceived to be an expensive destination, particularly in Canada. Moreover, the situation has been exacerbated in recent months by the strong appreciation in the value of the euro. Europe will never be an inexpensive destination, and it would be a mistake to try to position it as such. However, we believe that it is important to make a conscious effort to reinforce the perception that Europe is a “good value” destination. This is a particularly good time to emphasize the value offered by some of the newest members of the European Union.

**Safety.** Safety and security issues are likely to occupy a center-stage position on the world scene for the foreseeable future. Many travelers—particularly first-time visitors from the United States—are hesitant to fly right now and are concerned about the possible dangers of traveling in Europe. Safety, however, is a particularly sensitive topic, which should be addressed with the utmost care. Addressing the issue head-on runs the risk of exacerbating the situation by highlighting potential dangers of traveling in Europe. With this in mind, we recommend that the ETC weave a subtle message of safety and stability into its positioning, using extreme care not to alarm potential visitors.

## THE UNDERLYING TONE

In designing the positioning, we recommend that the ETC also pay close attention to the intangible elements that underlie Europe’s “personality.” For instance, on the basis of the research findings, we recommend that the ETC strive to portray Europe as a *vibrant* destination—a positioning that resonates positively with American and Canadian travelers. *Fun, romance, warmth, and sophistication* are still other elements that resonate positively with travelers.

On the other hand, we recommend that the ETC avoid portraying Europe as *cutting-edge*. As the research showed, travelers tend not to think of Europe in these terms. Additionally, we recommend that the ETC avoid portraying Europe as *fashionable*. Americans and Canadians think of Europe as being fashionable, but they do not find fashion to be particularly motivating as a reason for visiting Europe.

## UPDATING EUROPE'S IMAGE

In looking for ways to update the image of Europe, the ETC has questioned whether it should attempt to present Europe in a more modern light by emphasizing its contemporary aspects. However, as the research clearly indicated, American and Canadian travelers are motivated by the historical much more than the contemporary. At best, they are mildly intrigued by the juxtaposition of old and new.

As noted previously, a particularly good way of adding a contemporary dimension to the positioning is through the use of lifestyle imagery. However, we recommend that the ETC be very judicious about the extent to which it incorporates contemporary elements in the positioning of Europe. We firmly believe that the ETC should avoid making contemporary Europe the central feature of the positioning.

That said, we believe that it is important for the ETC's advertising, Web site, and other marketing communications to project a contemporary "look and feel." In fact, the "look and feel" of the ETC's marketing communications—over and above the content itself—can go a long way toward creating and maintaining a fresh, vital, and up-to-date image of Europe.

## TAILORING THE POSITIONING

Clearly, the ETC's first priority should be to develop a positioning targeted to its mainstream market. Only after the basics are in place should the ETC concern itself with tailoring the positioning for niche markets.

If and when the ETC decides to tailor the positioning, we recommend that it begin by differentially targeting younger travelers. The positioning for younger travelers should place greater emphasis on fun, excitement, and social interaction. Because Europe's vibrant music scene and its many clubs and cafes are of particular interest to this group, the positioning should also have more of an urban focus. We also believe it is important that the ETC emphasize Europe's value to younger travelers, who tend to be very cost conscious. Other, older age groups are unlikely to require a special positioning; the mainstream positioning focusing on history, culture, gastronomy, and scenic beauty should adequately speak to their needs and wants.

The ETC may also wish to differentially target visitors on the basis of previous experience with Europe. First-time visitors tend to be more cautious and may need more encouragement to visit Europe. The positioning for first-time travelers should give special attention to welcome, ease of communication, and ease of travel. Communicating Europe's historic elements, traditional culture, and well-known icons is also important to this group because they want to experience the Europe they have

heard and read about. Repeat visitors need to be given a reason to return to Europe. We believe that the ETC should address them as experienced international travelers. As such, the positioning should emphasize “authentic” Europe, off-the-beaten-path experiences, and less-visited cities and countries.

We recommend that the ETC use essentially the same positioning in all regions of the United States. Perceptions of Europe and motivations for visiting Europe are fairly consistent from one region to another. The principal exception is that travelers in the New York market are somewhat more receptive to a positioning with an edgier, more sophisticated tone.

In the case of Canada, the execution of the positioning needs to be different for English-speaking and French-speaking Canadians. Most importantly, all marketing materials designed for the Quebec market need to be in French. Also, as discussed in the research findings, there are a number of subtle differences in the travel patterns and preferences of English-speaking and French-speaking Canadians. For instance, French-speaking Canadians are strongly attracted to European gastronomy and are more attuned to European fashion. They also have a particular affinity for the French-speaking countries of Europe.



## XVI. IMPLEMENTING THE POSITIONING

### EXECUTING A TWO-PRONGED APPROACH

Americans and Canadians profess to want a considerable amount of detail in the information that they use to make destination decisions. Accordingly, we believe that the ETC should employ a two-pronged approach, using consumer advertising to spark interest in visiting Europe and using its Web site to provide the detail that travelers desire. Of course, in addition to sparking interest in Europe, the consumer advertising should also be used to drive travelers to the ETC's Web site.

Free of the need to communicate detailed information, the consumer advertising should focus on Europe as a whole rather than on regions or individual countries. The core elements of Europe's positioning—history, culture, lifestyle, gastronomy, and scenic beauty—are common to all the countries of Europe.

In contrast to the consumer advertising, we believe that it makes sense for the ETC's Web site to portray Europe as a set of regions. By portraying Europe as a set of exciting and compelling regions, the ETC can present a more comprehensive and detailed image of Europe, categorize the Web site into logical subgroupings, and speak to consumers who want to visit multiple countries on a single trip. Additionally, the ETC can add value by suggesting regional itineraries.

### CREATING EFFECTIVE IMAGERY

The most important consideration in selecting imagery is that the subject matter be immediately recognizable as being European. At a glance, the images should remind travelers of Europe and evoke the many positive perceptions that travelers have of Europe. Moreover, the images should emphasize the kinds of scenery, settings, people, and experiences that differentiate Europe from the United States and Canada. Examples of imagery considered unique to Europe are cobblestone streets, fields of flowers, red-tiled roofs, older men and women in traditional dress, outdoor flower and food markets, old architecture, and small cafés.

In keeping with the core positioning, images used to promote Europe should always include a historical element. This does not mean that they need to focus exclusively or primarily on history. Simply including a historic building or antique fountain in the background, for example, can go a long way toward evoking the “old world” feel that Americans and Canadians find so appealing about Europe.

Images should also depict inviting scenes that travelers can envision themselves being a part of. Ideally, the imagery should cause travelers to begin dreaming of being

in Europe. To this end, the ETC should emphasize Europe's most attractive locales and its most appealing activities—for example, images of a couple walking through a colorful outdoor market, travelers having a glass of wine in an old wine cellar, or a family dining at a beachside café.

Members of the trade, and consumers as well, recommended using a collage of imagery to depict Europe. In the interest of communicating Europe's diversity, we tend to agree. Using a collage of imagery would allow the ETC to feature a variety of locations and experiences.

Even in single images, there should be a layering of several elements of the positioning. For example, an image may show a couple dining at a small bistro or café, entertained by a street musician, against a background of old buildings, cobblestone streets, or a quaint village.

## INTEGRATING THE CONTEMPORARY WITH THE TRADITIONAL

As mentioned earlier, we recommend that the ETC be judicious about the extent to which it integrates contemporary elements in its advertising. The focus group participants made it amply clear that they had little interest in seeing pictures of modern buildings or any other element of contemporary culture commonly found in the United States and Canada.

Perhaps the best way to introduce contemporary imagery is to introduce modern lifestyle elements into traditional settings—for example, a stylishly dressed woman strolling through a traditional piazza or a nun in a traditional habit eating gelato on the steps of the Vatican.

## THE ROLE OF ICONS

Europe's well-known icons resonate strongly with Americans. The value of icons is that they immediately communicate Europe and arouse positive associations. Furthermore, icons such as the Eiffel Tower and the Colosseum speak to those travelers who have little familiarity with Europe. The drawbacks are that they have been used time and again, they are representative of a single country rather than Europe as a whole, and they are less compelling to Canadians than to Americans.

To leverage the strength of Europe's most famous icons, we recommend that the ETC use images such as the leaning tower of Pisa and Big Ben in its advertising, but that it incorporate these images in moderation and with subtlety. For example, the ETC should use only one image of an icon in a collage of images. Furthermore, an icon does not need to be central to the image but can be used as a backdrop or as a supporting element. The Eiffel Tower, for example, could be portrayed on the menu of a couple eating dinner at a small bistro or could be reflected in the restaurant's window.

The ETC may also want to develop new icons by gradually introducing North American travelers to new, lesser-known landmarks. The I. M. Pei pyramid and the Pompidou Center are examples of contemporary icons that have become increasingly familiar to North American travelers in recent years.

## OVERCOMING BARRIERS WITH IMAGERY

In choosing imagery, we recommend that the ETC also make a proactive effort to address travelers' concerns about visiting Europe. For instance, we recommend that the ETC use friendly faces and warm tones to create a welcoming atmosphere in its advertisements. This can be done in a direct manner by showing Europeans of various ages, nationalities, and professions clearly welcoming visitors from North America, or it can be done with more subtlety, by incorporating people with engaging facial expressions and body language as background elements. Use of bright, primary colors and direct lighting can also lend a sense of warmth and welcome.

Dealing with travelers' concerns about safety is more of a challenge. First and foremost, the ETC must at all times be completely honest with travelers about matters of safety and security. Under no circumstances should it attempt to create a false sense of security or downplay dangers that really exist. That said, the ETC can put its best foot forward by using imagery that evokes a sense of peace and tranquility—for example, carefree children at play in a park or a couple enjoying a quiet moment in a tranquil setting. In light of recent terrorist attacks, it is probably best to avoid pictures of crowded public places, such as train stations.

Considering the importance travelers—particularly Canadians—place on value and affordability in the current economy, we suggest that the ETC avoid using “rich” imagery, such as expensive restaurants, luxury stores, or first-class service, which connotes the feeling of extravagance and high prices. Instead, we recommend that the ETC depict Europe in an affordable light, emphasizing sightseeing, dining, and cultural experiences that are accessible to all travelers.



## APPENDIX A

### LIST OF ETC MEMBER ORGANIZATIONS



<b>Austria</b>	Austrian National Tourist Office (ANTO) / Österreich Werbung
<b>Belgium</b>	Flanders: The Tourist Office for Flanders / Toerisme Vlaanderen Wallonia: Office de Promotion du Tourisme Wallonie-Bruxelles (OPT)
<b>Bulgaria</b>	Ministry of Economy
<b>Croatia</b>	Croatian National Tourist Board (CNTB)
<b>Cyprus</b>	Cyprus Tourism Organisation (CTO)
<b>Czech Rep.</b>	Czech Tourism
<b>Denmark</b>	Danish Tourist Board
<b>Estonia</b>	Estonian Tourist Board
<b>Finland</b>	Finnish Tourist Board (MEK)
<b>France</b>	French Government Tourist Office / Maison de la France
<b>Germany</b>	German National Tourist Board / Deutsche Zentrale für Tourismus (DZT)
<b>Greece</b>	Greek National Tourism Organization (GNTO)
<b>Hungary</b>	Hungarian National Tourist Office (HNTO)
<b>Iceland</b>	Icelandic Tourist Board
<b>Ireland</b>	Tourism Ireland Ltd. and Fáilte Ireland
<b>Italy</b>	Italian State Tourist Board / Ente Nazionale Italiano per il Turismo (ENIT)
<b>Latvia</b>	Latvian Tourism Development Agency
<b>Lithuania</b>	Lithuanian State Department of Tourism
<b>Luxembourg</b>	Luxembourg National Tourist Office (ONT) / Office National du Tourisme du Grand-Duché de Luxembourg
<b>Malta</b>	Malta Tourism Authority (MTA)
<b>Monaco</b>	Monaco Government Tourist Office / Direction du Tourisme et des Congrès
<b>Netherlands</b>	Netherlands Board of Tourism & Conventions
<b>Norway</b>	Innovation Norway
<b>Poland</b>	Polish Tourist Organization
<b>Portugal</b>	Icep Portugal - Portuguese Trade and Tourism Office
<b>Romania</b>	Ministry of Transport, Constructions and Tourism
<b>Slovak Rep.</b>	Slovak Tourist Board
<b>Slovenia</b>	Slovenian Tourist Board
<b>Spain</b>	Tourist Office of Spain / Turespaña - Instituto de Turismo de España
<b>Sweden</b>	Swedish Travel & Tourism Council (STTC)
<b>Switzerland</b>	Switzerland Tourism / Schweiz Tourismus
<b>Turkey</b>	Ministry of Tourism / T.C. Turizm Bakanligi
<b>U.K.</b>	VisitBritain

(as of June 2004)



## APPENDIX B

### ROSTER OF INTERVIEWEES



## TOUR OPERATORS—THE UNITED STATES

<u>Tour Operator</u>	<u>Contact</u>	<u>Title</u>
Abercrombie & Kent	Helga Sommer Westrell	Vice President, Marketing
AHI International, Inc.	Jim Mancuso	Vice President, Product Development
American Airlines Vacations	Tess Paredes	Product Manager, Europe
American Council for International Studies	Richard Footner	Senior Vice President
Avanti Destinations	Peter Journey	Vice President, Marketing
Brendan Tours	Todd Ney	Director, Product Development
Classic Custom Vacations	Kathy Kovarik	Director, Product Development
Classic Journeys	Edward Piegza	Company Manager
Collette Vacations	Cyndi Zesk	Director, Marketing
Contiki Holidays	Lauren Yaker	PR & Promotions Manager
Country Walkers	Jamen Yeaton-Masi	Regional Manager
EF Institute for Cultural Exchange	Anna Rosefsky	Educational Programs Manager
EuroBound Tours	Tish Agaio	Director, Sales & Marketing
Europe Express, Inc.	Tove Pedersen	Marketing Manager
Future Vacations	Jeff Stutin	Marketing Sales Manager
Globus & Cosmos	Steve Born	Director of Marketing
Go Go Worldwide Vacations	Beth Kaplan	Director, European Marketing

Rail Europe	Nico Zenner	Vice President, Marketing
Travel Bound, Inc./GTA	Denise Hitch	Marketing Contact
Travel Impressions/American Express Travel	Anonymous	Senior Director of Product Marketing
Uniworld	Toni Koedijk	Director of Corporate Communications

## OTHER TRAVEL INDUSTRY CONTACTS—THE UNITED STATES

<b><u>Company</u></b>	<b><u>Contact</u></b>	<b><u>Title</u></b>
AutoEurope	Nigel Osborne	President, Destination Europe
British Airways	Lauren Francisco	Leisure Retail Marketing Manager
Chicago Tribune	Carolyn McGuire	Associate Travel Editor
Denver Post	Mim Swartz	Travel Editor
Endless Vacation; LA Times; Travel Holiday	Nik Wheeler	Travel Writer/ Photographer
Frommer's	Herbert Bailey Livesey	Travel Writer
Hertz	Renata Lima	International Marketing Manager
Lonely Planet	Robin Goldberg	Vice President, Marketing & Business Development
National Geographic Traveler; Cincinnati Enquirer	Marilyn Bauer	Travel Writer
The Washington Post	K. C. Sommers	Travel Editor, Sunday Travel Section
Travelers' Tales	Sean O'Reilly	Editor-at-Large

## TOUR OPERATORS—CANADA

<b><u>Tour Operator</u></b>	<b><u>Contact</u></b>	<b><u>Title</u></b>
Air Canada Vacations	Louise LeBeau	Vice President, Marketing
Alio Tours	Elizabeth Dupuis	Supervisor, Marketing
Canadian Travel Abroad	Himo Mansour	President
G.A.P. Adventures	David Bowen	Vice President, Marketing
Globus Canada	Wolf Paunic	Marketing Director
Holiday House	Craig Canvin	Vice President, Product
Horizon Holidays	Markus Schale	President
My Travel Canada Holidays	Jill Wykes	Vice President Sales, Tour Operators and Wholesalers
Rail Europe (Canada)	Derek McQuarrie	Business Development Manager, Eastern and Central Canada
Routes to Learning	Connie Jocasta	Marketing Director
Signature Vacations	Mary Heron	Vice President, Sales & Marketing
Travel Corp. Canada	Dorothy Switalska	Marketing Manager

## OTHER TRAVEL INDUSTRY CONTACTS—CANADA

<b><u>Company</u></b>	<b><u>Contact</u></b>	<b><u>Title</u></b>
The Calgary Sun	Anika Van Wyk	Travel Editor
The National Post	Deborah Stokes	Travel Editor
The Vancouver Province	Joseph Kula	Travel Editor



APPENDIX C  
U.S. INTERVIEW GUIDE



## ETC TOUR OPERATOR INTERVIEW GUIDE

### **Introduction**

Hello, my name is \_\_\_\_\_ with Menlo Consulting Group.

We are conducting a study on behalf of the European Travel Commission. The research will be used to guide the ETC's consumer marketing efforts in the United States, including an update of the ETC's consumer Web site.

We would very much appreciate your input. May I ask you a few questions?

**If necessary, assure the respondent that his/her comments will be kept confidential.**

**Before beginning, probe for familiarity with the ETC and provide the respondent with a description, as necessary.**

- 1a. A major focus of this research is the image and branding of Europe. As such, I would like to lead off by asking what comes to mind when you, personally, think of Europe as a vacation destination for Americans?

**Record verbatim.**

**Probe:**

**Intangibles**

Cost/value

Safety and security

Friendliness/welcome

Ease of travel

Quality of products and services

Diversity

Other (fun, excitement, etc.)

Adjectives they would use to describe Europe

**Product/attractions**

History/historical attractions

Contemporary lifestyle

Cities

Small towns, countryside, landscape/scenic beauty

Arts and culture

Gastronomy

Spas

Ancestry/exploring roots

Shopping

Other

**Other**

- 1b. Has your image of Europe changed in any way in the past two or three years? If so, how?

- 2a. In your opinion, does it make sense for the ETC to promote *Europe as a whole*?

**Probe:**

**Why/why not (e.g., too diverse)**

- 2b. More specifically, would you recommend that the ETC promote Europe as a single destination, a set of regions, or a collection of individual countries? When we speak of a set of regions, we mean a group of countries that share a common image.

**Probe:**

**Rank ordering of the three approaches**

**The appeal of Europe's diversity**

3a. Assume for a minute that the ETC were to promote Europe as a whole. What elements of Europe's image are common to Europe as a whole?

3b. If you were to choose one photograph to capture the essence of *Europe as a whole*, what would it be? And if you were to choose another one or two photographs, what would they be?

4a. Now assume for a minute that the ETC were to promote Europe as a set of regions. What should those regions be? In other words, which groups of countries share common images?

4b. FOR EACH REGION IDENTIFIED BY THE RESPONDENT, ASK: What countries would you include in that region?

4c. FOR EACH REGION IDENTIFIED BY THE RESPONDENT, ASK: What are the defining elements of [REGION'S] image?

- 5a. In your opinion, what aspects of Europe should the ETC emphasize in its promotional efforts? In other words, what aspects of Europe are most important in influencing American travelers to visit Europe?

**Probe:**

**Intangibles**

**Cost/value**

**Safety and security**

**Friendliness/welcome**

**Ease of travel**

**Quality of products and services**

**Diversity**

**Other (fun, excitement, etc.)**

**Adjectives they would use to describe Europe**

**Product/attractions**

**History/historical attractions**

**Contemporary lifestyle**

**Cities**

**Small towns, countryside, landscape/scenic beauty**

**Arts and culture**

**Gastronomy**

**Spas**

**Ancestry/exploring roots**

**Shopping**

**Other**

**Other**

- 5b. Which *one* of these factors is the *single most important* draw for Americans?

6a. Should the ETC emphasize different aspects of Europe to different age groups?

**Probe:**

**Younger travelers (e.g., excitement vs. relaxation)**

**Boomers**

**Seniors**

6b. Are there any other market segments for which the ETC should emphasize different aspects of Europe?

**Probe:**

**Group/independent travelers**

**First-time/repeat/highly experienced travelers to Europe**

**Other (DINKS, families, empty nesters, etc.)**

- 7a. In your opinion, are there any aspects of Europe's image that need to be changed or improved? If so, what are they and how big an impact are they having on visitation?

**Probe:**

**Crowding and congestion**

**Cost/value**

**Sense of welcome to Americans**

**Safety and security**

**Language barriers**

**Distance**

**Other**

- 7b. In your opinion, can Europe's image be changed through marketing? What would be the most effective way of doing so?

**Probe:**

**What can/should be the role of ETC**

8. IF NOT ADDRESSED IN Q1A, ASK: Do you think that recent political tensions between the United States and some European countries have impacted Americans' image of Europe? What about their desire to visit Europe?

**Probe:**

**Whether this applies generally or to specific countries**

9. IF TIME PERMITS, ASK: I'd like to ask you one last question. By way of summary, what would you say that Europe should stand for as a brand?

**Record verbatim**



APPENDIX D  
ETOA RESEARCH FINDINGS



**Q1 Have you been to Europe on vacation before?**

	<u>USA</u>	<u>Canada</u>
No reply	1%	0%
Never	42%	50%
Once	30%	8%
Twice	4%	14%
Three times	8%	11%
Four or more	15%	11%

**Q2 Before the trip, how important were the following aspects in your decision to come to Europe?**

		<u>USA</u>	<u>Canada</u>
	No reply	0%	0%
Historic	Very important	52%	69%
	Important	32%	28%
	Neutral	14%	3%
	Not very important	2%	0%
	Unimportant	0%	0%
Cultural	Very important	54%	75%
	Important	33%	17%
	Neutral	10%	6%
	Not very important	2%	3%
	Unimportant	0%	0%
Diverse	Very important	32%	33%
	Important	37%	28%
	Neutral	18%	17%
	Not very important	6%	8%
	Unimportant	2%	6%
Secure	Very important	41%	50%
	Important	34%	22%
	Neutral	13%	17%
	Not very important	6%	6%
	Unimportant	2%	0%
Clean	Very important	34%	36%
	Important	34%	33%
	Neutral	22%	19%
	Not very important	5%	8%
	Unimportant	2%	0%

Good value	Very important	47%	44%
	Important	24%	28%
	Neutral	18%	11%
	Not very important	6%	11%
	Unimportant	3%	0%
Welcoming	Very important	31%	42%
	Important	38%	36%
	Neutral	18%	14%
	Not very important	4%	3%
	Unimportant	2%	0%
Scenic	Very important	70%	78%
	Important	25%	17%
	Neutral	5%	3%
	Not very important	0%	0%
	Unimportant	1%	0%
Gastronomic	Very important	14%	25%
	Important	37%	42%
	Neutral	33%	17%
	Not very important	8%	3%
	Unimportant	3%	6%
Good shopping	Very important	14%	31%
	Important	27%	19%
	Neutral	24%	25%
	Not very important	24%	6%
	Unimportant	9%	14%
Fashionable	Very important	3%	14%
	Important	15%	11%
	Neutral	33%	31%
	Not very important	29%	11%
	Unimportant	17%	28%
High quality service	Very important	30%	33%
	Important	31%	31%
	Neutral	29%	31%
	Not very important	6%	0%
	Unimportant	2%	0%
Easy to travel to	Very important	43%	44%
	Important	31%	36%
	Neutral	14%	11%
	Not very important	6%	3%
	Unimportant	3%	0%

**Q3 At the end of your trip, which of these same aspects do you think accurately describes your experience in Europe?**

		<u>USA</u>	<u>Canada</u>
	No reply	2%	0%
Historic	Strongly agree	78%	78%
	Agree	19%	19%
	Not sure	1%	0%
	Disagree	0%	0%
	Strongly disagree	0%	0%
Cultural	Strongly agree	66%	64%
	Agree	25%	19%
	Not sure	3%	11%
	Disagree	2%	3%
	Strongly disagree	0%	0%
Diverse	Strongly agree	45%	42%
	Agree	34%	31%
	Not sure	12%	11%
	Disagree	2%	6%
	Strongly disagree	0%	3%
Secure	Strongly agree	30%	19%
	Agree	42%	39%
	Not sure	12%	25%
	Disagree	8%	11%
	Strongly disagree	3%	0%
Clean	Strongly agree	26%	17%
	Agree	34%	31%
	Not sure	22%	36%
	Disagree	12%	14%
	Strongly disagree	1%	0%
Good value	Strongly agree	23%	22%
	Agree	31%	17%
	Not sure	29%	31%
	Disagree	7%	14%
	Strongly disagree	3%	11%
Welcoming	Strongly agree	34%	17%
	Agree	35%	50%
	Not sure	16%	22%
	Disagree	6%	6%
	Strongly disagree	2%	0%

Scenic	Strongly agree	68%	75%
	Agree	23%	17%
	Not sure	3%	3%
	Disagree	0%	0%
	Strongly disagree	1%	0%
Gastronomic	Strongly agree	14%	19%
	Agree	30%	33%
	Not sure	32%	31%
	Disagree	10%	3%
	Strongly disagree	3%	3%
Good shopping	Strongly agree	16%	22%
	Agree	31%	25%
	Not sure	32%	22%
	Disagree	12%	19%
	Strongly disagree	4%	6%
Fashionable	Strongly agree	14%	11%
	Agree	25%	36%
	Not sure	37%	19%
	Disagree	10%	11%
	Strongly disagree	7%	14%
High quality service	Strongly agree	22%	8%
	Agree	29%	47%
	Not sure	27%	28%
	Disagree	12%	6%
	Strongly disagree	4%	8%
Easy to travel to	Strongly agree	34%	28%
	Agree	35%	53%
	Not sure	24%	17%
	Disagree	2%	0%
	Strongly disagree	1%	0%

**Q4 Would you return to Europe for another visit?**

	<u>USA</u>	<u>Canada</u>
No reply	1%	0%
No	5%	3%
Unlikely	4%	0%
Possibly	6%	0%
Probably	19%	11%
Yes	65%	86%

If yes, when?	Next year	27%	29%
	Next 3 years	36%	26%
	Next 5 years	11%	26%
	Don't know	26%	16%



## APPENDIX E

### TRADE IMPRESSIONS OF EUROPE— VERBATIM RESPONSES (UNITED STATES)



## THE U.S. TRAVEL TRADE

“...what comes to mind when you, personally, think of Europe as a vacation destination for Americans?”

*Culture. History. The culinary experience.*

*Culture. The foreignness/familiarity relationship. It's different, but not too different. Europe is exotic, but not scary.*

*Culture. History. Charm.*

*Culture...the traditions and ties; ethnic ties to our own in the U.S. Europe is really the genesis of our cultural life here in the U.S. History...historical traditions, the wars in Europe, the history of Europe; again, it has had an enormous impact on our own history.*

*Europe has great culture and history. Plus, there is the shared values and history with the U.S. We have a certain closeness based on our shared history. Beautiful towns and villages. Friendly, fun-loving people.*

*Europe is a relatively comfortable destination that is well traveled by other Americans, and there is enough of an exotic nature to it to also be intriguing to travelers.*

*Europe is different from the U.S. experience. Different cultures, new experiences, museums, etc.*

*Europe offers choice—a choice of destinations and experiences. Plus, it offers adventure.*

*Expensive, cultural, ancient, churches, history. People go to Europe for all sorts of reasons...there are the bus tours that bring you to seven different countries in one week...there are the specialty experiences and products like the cooking, walking, drinking tours.*

*History, getting in touch with something that doesn't exist in the United States. Culture, the authenticity of each destination. Also, within a relatively small geographic proximity there is such a wide variety of traditions, cultures, tastes—food and wine, etc., within a small geographic footprint.*

*History, tradition, good food. A lot of different cultures in close proximity.*

*History. Architecture. Culture.*

*History. Medieval tours. Fine dining.*

*It is an active destination as opposed to a leisure destination. Americans go there for fine dining, culture, not relaxing on the beach. It is not an inexpensive destination.*

*It is close, not as far as Asia, Africa, even Central America, if you live on the east coast. It's a safer destination.*

*It really depends on how much experience a traveler has with Europe. Overall, however, Europe is different from the U.S. experience. Different cultures, new experiences, museums, etc.*

*It's a "no brainer." It is a great place to go with such a variety of experiences. It's somewhere Americans can visit more than once. It's history, culture, and the outdoors...Europe has a similar feel to the U.S., making it an easy place to travel.*

*It's everyone's favorite destination. It has castles, cities, architecture, history, Roman ruins. It has it all.*

*It's not here. Europe is ancient, it has a strong history. It is where so many Americans are from. It represents our ancestry. Great food and shopping.*

*It's the history...the people. Americans want to immerse themselves in what Europe is all about. Americans tend to be more comfortable in English-speaking countries, but they still feel comfortable in much of Europe.*

*It's different...unique...a very culturally rich experience.*

*It's fascinating. Culture, diversity of cultures. Fun. Exciting. Historical.*

*Our clients are teachers and educators; they see it as an educational destination where they can inform their students about history, culture, art. For them, it enhances their educational curriculum.*

*Our customer base is wealthier, so the things that appeal to them are quite specific—palaces, historic sites, luxury hotels, food and wine, quality services.*

*Right now, there are challenges in getting people to visit Europe. Many people just don't want to go to France right now. Italy, on the other hand, is our top destination. England comes to mind as being expensive.*

*The "old world," our roots and ancestry. Europe is versatile; it has a lot to offer. Scenery. A rich and long-standing history, something that really is not found in the U.S. A variety of countries with distinct, individual characteristics. The ability to get to many different countries in a very short period of time.*

*There is a lot to see and do. Our clients go there because they want to experience the European lifestyle.*

*Wonderful. It's the old-world experience you can't get here...the culture, the architecture....*

## APPENDIX F

### TRADE IMPRESSIONS OF EUROPE— VERBATIM RESPONSES (CANADA)



## THE CANADIAN TRAVEL TRADE

“...what comes to mind when you, personally, think of Europe as a vacation destination for Canadians?”

*Crowded, overrun with tourists, very expensive, but really good culturally. Much of this has to do with the euro. The Canadian dollar has gained against the U.S. dollar, but not the euro. And now, all the countries that used to be so great and cheap, like Italy, are too expensive because of the unified currency.*

*Culture, history, architecture. By culture, I mean the arts, and the Renaissance, and classical art and also the modern art and the well-known painters. And also, the cinema and French movies.*

*Expensive...both in terms of getting there and once you are there. Touring around Europe is really expensive.*

*Expensive, but there is huge opportunity since most Canadians are from Europe. It is not so much getting there as getting around and buying things once you are there that is the challenge. The Canadian dollar has been historically weak against the U.S. dollar and the euro. Now it is better against the U.S. dollar but not the euro.*

*History and culture. Although Canada has changed, it is still a place where most people can trace their roots back to Europe. Old. Europe has been there so much longer than Canada. Expensive, although I guess I shouldn't say that. Cities, architecture, music, gastronomy.*

*It is the sort of holiday that people are looking for when they are willing to use their brain a little bit more. When they go to the south, they are looking for sun and not to think. At [name withheld], we look at these leisure travelers and also those who want to go to places like Europe. Europe is history and culture; there are a lot of monuments that people think of like the Tour Eiffel, and in Rome. There is also really good food. This is one of the first and important things they think of.*

*Long-haul, expensive, trans-Atlantic.*

*Multiple different countries, experiences, and cultures within the same destination. There is really something for everyone in Europe.*

*The culture, the history, the variety of food. The theater...belly dancing, Strauss, a Bach recital in Leipzig.*

*The fact that there has been a sharp decline in travel in recent times. Interest is still there, but actual travel has dropped off. It is on the expensive side. Disappointed that pricing hasn't dropped in line with decreased outbound travel. It remains a selective choice away from the mainstream.*

*This is a very tough question to answer because it deals with Europe as a whole. I think of so many different things, and Europe is really a group of very different countries. Probably the culture, the heritage, old buildings, architecture, food, traditions.*

*Two different things come to mind. First, I think of summer touring...cultural events, special activities, something that shows how Europe is alive in the summer time. Then, I think of winter activities—such as skiing, and mountains and snow in Italy.*

*Urban, cultural, historical, and heritage. The consumer really recognizes and contemplates European icons. He is aware of and thinks of Rome, Paris, and London. The historical significance of Europe is very important. Europe also revolves around an exciting experience that is established as being good value. The consumer thinks of fashion, the European lifestyle, and cultural diversity.*

## APPENDIX G

### CONSUMER IMPRESSIONS OF EUROPE— VERBATIM RESPONSES (UNITED STATES)



## WHAT COMES TO MIND WHEN YOU THINK OF EUROPE?<sup>21</sup>

### PAST VISITORS

Six thousand miles away, but delightful when you get there.	Smoking	Train travel
Bruges	Lots of history	Walking
Italy	Architecture	Beautiful countryside
Rome	Gothic cathedrals and castles in Germany	Beautiful landscapes
Russia	Culture	Canyoning
Different currencies	Great art and architecture	The Swiss Alps
Different/foreign languages	Great museums	Fabulous lifestyle (enjoyment of life, slower pace, less workaholic)
Multi-lingual people	Music	Great sites/famous places
Variety	Open and creative people	Monuments
Amazing/good food	Mixture of old and new	Points of attraction
Wine	Great shopping	
Cafés	Vacation	
Strong coffee	Hostels/hotels	

### NON-VISITORS

It's far away/a long trip	Large, multi-cultural	Tradition
England	Cuisine/dining	Walking through old streets
France	Different foods	Western civilization
Greece	Good food	Old buildings/architecture
Ireland	Great food and wine	Arc de Triomphe
Scotland	Ancestry/past generations of my family	Basilicas
Italy	Roots	Castles
London	Lots of ancient history	Eiffel Tower
Paris	Ancient bonds	Art and music
Spain	Historic sites	Museums
Switzerland/Swiss Alps	Old world	Romantic venues
Venice	The different cultures and history they have as compared to America	Tourist spots
Different cultures		Travel/vacation
Different languages/language barriers		

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<sup>21</sup> This listing does not indicate how many participants wrote down any one answer. For example, multiple participants wrote down “good food,” yet it is mentioned in each list only once.

NON-VISITORS CONTINUED

Photo opportunities  
Sightseeing/touring  
Backpacking from  
country to country  
Beaches/oceans  
Beautiful landscape  
Flowers/greenery  
Green highlands/  
countryside

Mountains  
Trains  
Cars and the autobahn  
Crazy traffic  
Waterways and ships  
sailing from city to city  
Great shopping  
Different sizes  
Fashion/style

Anti-American  
sentiment  
Dislike of Americans  
France and the war  
Less clean and healthy

## WHAT ADJECTIVES WOULD YOU USE TO DESCRIBE EUROPE?

### PAST VISITORS

Adventurous/full of adventure	Exhausting	Poetic
Artistic	Fantastic	Quaint
Beautiful	Fascinating	Relaxing
Charming	Fun	Romantic
Different	Interesting	Scenic
Exciting	Multi-faceted	Tense
	Nostalgic	Wonderful

### NON-VISITORS

Ancient	Entertaining	New
Artistic	Exotic	Noisy, not peaceful
Authentic	Expensive	Old
Beautiful	Fascinating	Pretty (some parts)
Breathtaking	Flamboyant	Rich
Bustling/busy	Friendly	Rustic
Charming	Fun	Scenic
Colorful	Gastronomic	Sophisticated
Cultural	Historic/historical	Traditional
Dirty (in parts)	Interesting	Vast
Diverse	Laid-back	Warm
Eclectic	Mountainous	Whimsical
Elegant	Mystery	



## APPENDIX H

### PROTOTYPE ADVERTISING IMAGES



IMAGE #1



IMAGE #2



IMAGE #3



IMAGE #4



IMAGE #5





## APPENDIX I

### CONSUMER IMPRESSIONS OF EUROPE— VERBATIM RESPONSES (CANADA)



## WHAT COMES TO MIND WHEN YOU THINK OF EUROPE?<sup>22</sup>

### PAST VISITORS

Beautiful <sup>23</sup>	Exciting place	Different products
Beautiful landscapes	Fun	Discoveries
Mountains	People	Many civilizations
Nature	Character	Political diversity
Ocean	Social	Rich culture
Scenery	Villages	Variety of languages
Perennial	Cities	Food
Ancient and modern	European Union	Good food
Architecture	Euro	Shopping
Castles	Expensive	Spas
Churches	Cost	Sport
History	Crowded	Swimming
Old country	Dense population	Tennis
Origins and traditions (musical, artistic, etc.)	Culture	Tanning on the beach
Rich in history	Dépaysement	Sun
Art/history	Strange	Warmth
Artistic treasures	Different	Vacation
Museums	Different cultures	Family vacations
Cafes	Different languages	Visiting my husband's family
Small cars	Opportunity to speak a foreign language	

### NON-VISITORS

Alps	Extremely modern places, people, ideas	Fun
Beautiful countryside	Princes Andrew and William, Princess Diana	Luxurious
Countryside	The Queen	Relaxing
Scenery	Race cars	Laws are more lax
Architecture	French roots	Biking
Castles	Social life	Snowboarding
Greek antiquities	Douro	Many languages and histories
Historical	Espresso	Varied cultures
Medieval period	Good food	Dense populations
Nice buildings		

<sup>22</sup> This listing does not indicate how many participants wrote down any one answer. For example, multiple participants wrote down “castles,” yet it is shown in each list only once.

<sup>23</sup> All comments that were originally given in French have been translated to English for this report.

NON-VISITORS CONTINUED

Old cities	Good wines	They speak French in many places
Untouched by time	Wine and cheese	Great Britain
Cradle of western civilization	Vineyards and wine	Italy, France, Monaco
Visit ruins	Shopping	Little French villages
Art galleries	Euro	Portugal (Algarve)
Opera	Expensive	Prague
Museums	Borders	Weather
Old music	Many countries close together	Rain in London
Autobahn	Many countries to see	The green of Ireland
Atmosphere	Many languages	Other side of ocean
Friendly people	Yachts	Train
Somewhere I could see myself living	Beautiful	
Culture	Exciting	
Elegance	Exotic	

## WHAT ADJECTIVES WOULD YOU USE TO DESCRIBE EUROPE?

### PAST VISITORS

Ancient	Diverse	Multipurpose
Artistically rich	Dynamic	Old and new
Beautiful	Enjoyable	Picturesque
Boisterous	Enriching	Relaxing
Breathtaking	Exciting	Rich
Catholic	Eye-opening	Slower
Colorful	Fascist	Sometimes unclean
Crowded	Fast-paced	Surprising
Cultivated	Gastronomical	Unusual behaviors
Cultural	Historic	Varied
Culturally rich	Historical	Vast
Deep	Interesting	Very pretty
Dense	Laid-back	Vibrant
Dépaysant	Not aggressive	Visually nice
Different	Multicultural	

### NON-VISITORS

Accessible	Emotion	Mysterious
Advanced	Exciting	New tastes
Ancestral	Expensive	Old
Ancient	Far	Old continent
Attractive	Freedom-like	Open
Beautiful	French	Peaceful
Busy	Friendly	Refined
Classic	Fun	Rich in culture
Cold (Germany)	Good food	Scenery
Communication	Healthy	Sexy
Crowded	Historic	“The” old-world
Cultured	Liberated	Warm (south)
Design	Linguistic	Well known place
Different	Loud-mouthed	Wise
Diverse	Modern	