



## Moose, Mountains, and Mounties: Changing Americans' Image of Canada

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Founder & CEO

In 1985, my firm was hired by the Canadian government to conduct the largest ever study of tourism in the U.S. The project was huge: 14 focus groups across the country, followed by 9,000 in-depth interviews conducted in people's homes, about 50 minutes in duration, with a representative sample of 1,000 households in each of the nine census divisions.

The price tag was enormous also: over \$2 million in current dollars. Why spend that much on a research study? Tourism was big business for Canada in 1985, employing almost 600,000 people and generating about \$20 billion in revenue annually. However, the country had lost close to half its worldwide market share of tourism over the previous decade, and nobody knew why. Canada needed a new strategy, and it would be based on consumer research in the U.S., which is by far the Canada's largest source of tourists.

### If You Don't Know Where You're Going - - -

Before undertaking the research, we spoke to a number of people in the Canadian tourism industry and listened to various hypotheses as to why Canada's business had been going downhill. We heard that:

- Canadians are seen as dull, boring people
- The country is stereotyped as a wilderness destination
- Canadian cities are not seen as sophisticated and sexy
- Canada is known for snowstorms in August, a land of perpetual cold
- Canada is too expensive

As Yogi Berra put it, "If you don't know where you are going, you will wind up somewhere else."

Possible solutions under discussion included spending more money on media advertising, continuing to play on Canada's strength as an outdoors destination, and focusing on the major cities to counteract the stereotype. The purpose of the research was to provide a roadmap to guide the industry through the maze of conflicting opinions and options.

In the fall of 1985, 350 industry leaders assembled in Ottawa, the nation's capital, for the unveiling of our study and the new advertising campaign. The research shattered a number of myths about what Americans thought of Canada and what motivated them to spend their vacation dollars there rather than elsewhere.

First, let's deal with the issue of "dull." During the consultative process, one industry representative actually suggested that Canada should be marketed to people who like dull, boring places. Perhaps the actor, Donald Sutherland, was right to say, "Canadians are like the children who press their noses against the window of life, secretly suspecting that they are missing all of the fun that their rambunctious American neighbors have, but too worried to try it themselves lest they fail."

Well, according to our study, Americans actually rated the U.S. as more dull and boring than Canada. While certainly not a nation of swingers, Canada did have more cachet than its tourism leaders suspected.

So if Americans did not see Canada as dull, how was it seen? Unquestionably, the stereotype of Canada as the vast, unpopulated wilderness replete with "Moose, Mountains and Mounties" was there. In fact, my colleagues and I were guessing that the research would show the outdoors to be Canada's greatest strength as a vacation destination.

Instead, much to our surprise, we found both Canada's market share and its imagery both to be weak in comparison to the U.S. itself in the outdoors trip category. Another myth bit the dust. While Canada captured a small segment of the U.S. outdoors market, Americans generally preferred their own woods and mountains. Canada's wilderness was seen as a bit too remote and rugged for their tastes, and not offering enough amenities. It seemed that Americans' idea of roughing it was drinking a martini out of a paper cup.

What then about cost? A lot of people in the tourism industry believed that price was key, and that Canada was not competitive. Our results showed that the majority of Americans were more fun-conscious than price-conscious when it came to a vacation, and that given

the value of the Canadian dollar at that time, Canada was not seen as an expensive place to visit.

As for the climate, too many years of American weather forecasters talking about cold fronts and snow coming down from Canada had done its damage. Americans saw Canada as having lots of pristine lakes, but figured they were probably still frozen over in summer.

What a myth! It's true that Canadian winters are too long and too cold. That's why so many Canadians leave in winter for sunnier climes. In Florida, they call them Snowbirds. And yet the summers in many parts of Canada are glorious. At our family cottage on the French River, 3½ hours north of Toronto, swimming in summer feels like being in warm bathwater.

So heating up the Canadian outdoors in advertising was one of our recommendations to the Canadian government. The new campaign would actually show a woman in a bathing suit ---- not a bikini; this was Canada after all ---- diving into a lake in summer time.



But generally, the weather was much less of an issue than we expected. It impacts more on beach resort vacations, where warm weather is must. Much of Canada's business comes from northern U.S. states, which have a similar climate to Canada.

If the country was not dull and boring, if the prices were good, and the climate was not a major factor, what was the key issue? I've already alluded to the fact that Canada's predominant wilderness image was not a great strength. In fact, the Moose and Mountains problem was dragging down the image of cities like Toronto, Montreal, and Vancouver, particularly in the areas of sophistication and nightlife.

***Canada's problem was not that American's saw the country in a negative light, but rather for the most part they didn't see Canada at all.*** Out of sight means out of mind. Their attitude was one of benign ignorance.

To become a vacation destination, first you have to get on the consideration list. Next, you need to move up to the top of the priority list, what marketers call top-of-mind awareness. Without that awareness, no wonder Americans had a stereotyped but rather fuzzy image of

what Canada was all about. From their standpoint, Canada was one of the world's best-kept secrets.

## Finding the Hot Button

What to do? Simply blasting key U.S. feeder markets with advertising would help solve the awareness problem. But what should the message be? Certainly not the old wilderness stereotype that had been reinforced by previous campaigns. “Moose, Mountains, and Mounties won't sell,” we told the assembled industry leaders in Ottawa. “Canada needs a new image.”

The research findings came as a huge shock. The biggest surprise was that the largest single category of trips taken to Canada by Americans is not the outdoors vacation, but rather a *touring vacation*. Touring comprised about half of all trips in the previous year, twice as many as outdoors trips.

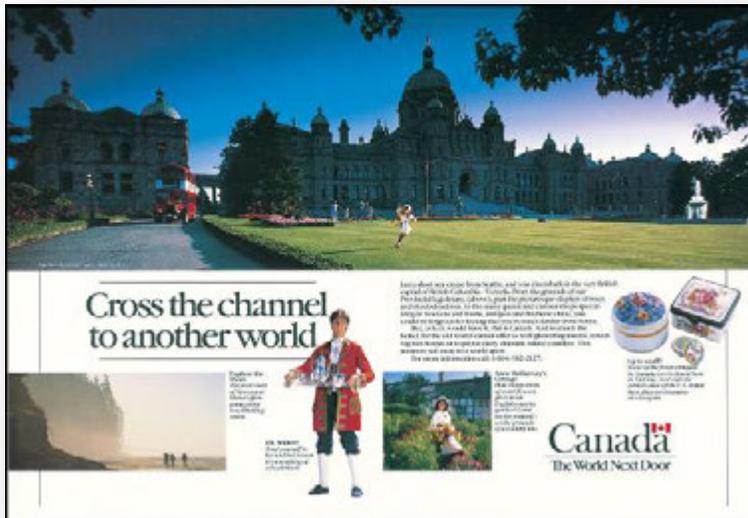
A touring vacation is a longer, well-planned sightseeing trip through a region, and it has no single product focus. It encompasses any of the major tourism attractions that the destination has to offer, including cities, small towns and villages, the rural countryside, wilderness areas, historical sites, shopping, anything that makes the destination interesting and unique.

Our research showed that what makes Canada different for Americans is something that the country's advertising had not been telling them: **It's a foreign country**. The Longwoods report to the tourism industry concluded: *“Our one point of advantage over the U.S. as a touring destination is that we're different . . . a foreign destination offering a different culture and way of life, that we're **Canadian**. In a touring vacation, people are more likely to be looking for a difference, for some foreign mystique or cachet . . . something that the U.S. cannot deliver very well, but which Americans think we possess. Europe may be the gold standard for a foreign experience, but Canada isn't doing half bad. And, we're a lot closer.*

*In both this major quantitative study, and in 14 focus groups involving in-depth discussions with many Americans, one thing stood out about Canada as being unique and important. It was not our mountains and not our cities. The turn-on was neither beautiful scenery nor beautiful architecture, whether modern, quaint, or historic. Canada's point of advantage was the thought of that scenery and*

those buildings being in another country. It is Canada's people, her cultures, her heritage and her ethnic mosaic that makes Canada substantively different from America."<sup>1</sup>

When presented with these findings, Canada's Minister of Tourism, Jack Murta, said, "I was startled and surprised, as I think many Canadians would be, that we've had this product all this time right under our noses."



## The World Next Door

In the eyes of Americans, Canada was seen different, and that perceived foreign mystique they experienced was a key reason for coming north. They couldn't necessarily articulate the difference in words, any more than Canadians can. But Canada sure *felt* different. I called it "*Border Magic.*" It defies analysis, because the more you try to analyze a mystique, the more it loses its mystery.

We had to give the client and advertising agency some guidance as to how to translate the cultural factor into pictures and words. The problem is that, unlike countries that have strong indigenous cultures, like Japan or China, Canada is a

<sup>1</sup> Tourism Canada: Canadian Potential within the U.S. Pleasure Travel Market. Highlight Summary Report. **The Longwoods Research Group**, 1985, 22-24.



English. I go to Chinese banquet halls which hold hundreds of people each, and my family may be the only westerners in the place eating our dim sum. We might as well be in Hong Kong.

Then there's Caribana, North America's largest street festival, with costume displays, steel bands, and calypso, and which attracts over a million people each summer. Quebec offers a very French flavor just across the border from the American northeast. Vancouver is a Pacific Rim city with a strong Asian feel. These are just a few examples of Canada's diversity.

The new strategy was to position Canada in the U.S. as a foreign country, but close at hand and welcoming, with an unparalleled variety of exciting cultural experiences. We tested a number of advertising themes and tag lines in focus groups. The winner was: "***Canada: The World Next Door.***" In terms of imagery, the focus groups found that showing Canada's ethnic mosaic was more appealing than shots of either mountains or cityscapes.

The ***World Next Door*** campaign<sup>2</sup> eventually became a classic, and ran for many years. It won a number of international awards, including Best Tourism Marketing Campaign and Best of Festival at the 1987 International Film and Video Festival.

## Did It Work?

Before the ***World Next Door*** campaign ran in 1986, Canada had a positive image among Americans, but U.S. pleasure travelers saw their own country in an even more positive light. In comparison to the U.S., Canada was seen as much less well-known and popular, less exciting with fewer things to see and do, and lacking first-class food and accommodation. The major Canadian cities were seen as clean, safe, and offering a foreign experience. But, they were seen as weak in terms of food and accommodation, excitement, and variety of things to see and do. And, as noted earlier, even Canada's outdoors image was a little too rugged for mainstream American travelers.

The Canadian government and its marketing partners began to highlight the country's foreign mystique in 1986 with the new campaign theme, "***Canada: The World Next Door.***"

Our 1989 research provided an opportunity to see how Americans' views of Canada had changed since 1985. What a difference a few years of focused promotion can make! For each of the three key segments, touring, city, and outdoors, Canada's image relative to the

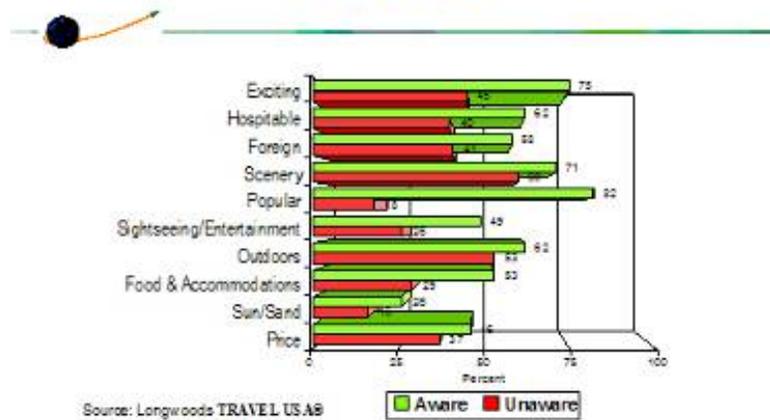
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<sup>2</sup> The creative genius behind the campaign was John McIntyre, now partner/writer with Agency'59 in Toronto.

U.S. showed a remarkable turnaround. From a weak image in 1985, Canada moved to a position where it beat the U.S. on the most important selection criteria.

Our research showed that those Americans who were aware of Canadian advertising had a much more positive image of Canada on virtually every dimension we studied - - - a huge positive halo effect. While the impact was strong for touring vacations, it was the perception of Canada's cities that showed the most dramatic lift. For example, for the most important

### Impact of Advertising on Canada's Touring Image



city hot button, excitement, three out of four respondents gave Canada a strong positive rating, in comparison to only 28% for those unaware of advertising.

Although the campaign emphasis was on Canada's foreign flavor, not on its vast wilderness, the country's image as an outdoors destination did not suffer as a result. Instead, Canada retained its traditional strengths for camping, hunting, and fishing, but was now seen as much more

multifaceted and exciting.

The bottom line from our 1989 research was that Americans aware of Canadian tourism advertising rated Canada much more highly in terms of both overall image and value for money. Most importantly, intentions to visit Canada in the next two years were much stronger among the people who were aware of the campaign.

The bottom line was that, after years of decline, Canada's business from the U.S. surged 23% in 1986. In 1989, the key products identified by our research and promoted by the *World Next Door* campaign: touring vacations and city trips, were up 21% and 25% respectively. **By 1989, Canada was now seen by Americans as a more enjoyable place to visit than their own country!**

## Lessons Learned

First, we never would have focused on the cultural story if we had relied on the traditional left-brain methodologies that are the textbook ways of doing things in market research. People would have simply played back what they already know, that Canada's draw was

spectacular beauty, forest, fish and bears: the great outdoors. And for years, the country's campaigns were driving that image ever deeper.

The research finally explained why Canada had lost close to half its worldwide market share in tourism in a decade. It was sending the wrong message to the wrong audience.

By hitting the cultural hot button, Canada's image was enhanced on most image dimensions, not just those emphasized in the campaign. It was a clear illustration that creating emotional engagement with consumers through great creative can create a strong perceptual halo effect.

Most importantly, the results shattered the standard marketing myth that it takes many years to change an established image. Our research demonstrated that Canada's image in the U.S. was transformed within a few years from the old stereotype of "***Moose, Mountains, and Mounties***" to "***The World Next Door.***"

## Dr. Bill Siegel



Bill is Founder and CEO of Longwoods International, a respected consulting firm that specializes in brand strategy and communications research.

After receiving his Ph.D. from the University of Michigan, he taught psychology and research methods at the University of Western Ontario, and was Distinguished Visiting Lecturer at the University of Western Australia. Bill switched from academia to the business world in 1976, when he was hired by Bell Canada as Manager of Marketing Research to design and implement a groundbreaking study of advertising ROI for the CEOs of the telephone companies across Canada. He continues to develop and apply award-winning methodologies for measuring bottom-line campaign effectiveness at Longwoods.

Bill's work has been cited in broadcast and print media around the world, including **The New York Times**, **USA Today**, **Newsweek**, and **The Times of London**. He has been invited to speak at many industry functions, such as state governor's conferences, The Brookings Institution, the Advertising Research Foundation, American Marketing Association, the European Society for Opinion and Marketing Research, the Bureau of Broadcast Measurement, the U.S. Economic Development Administration, and the Public Relations Society of America. He has served on boards for Georgia Tech, Waterloo University, Ryerson University, which awarded him its highest honor, and the Travel & Tourism Research Association.