

EQ[®] Toolkit

Canada

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KEEP EXPLORING

EQ | QE[™]
Explorer Quotient | Quotient explorateur

Determine Your Best Customers Using EQ	Fine-tune Your Product Using EQ	Package Experiences Using EQ	Describe Your Experience Using EQ	Assess and Choose Imagery Using EQ	Promote and Sell Using EQ
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Getting Ready: An Overview of the EQ Toolkit

Looking for ways to make your product more attractive to customers and boost your sales?

Designed with CTC's award-winning research, the EQ Toolkit will help you find and keep your best customers. Along with offering key insights to better understand your customer, the EQ Toolkit provides practical strategies to help you improve your marketing activities and increase sales.

The EQ Toolkit's modular approach allows you to pick and choose the topics that interest you, be it designing a great product or package, understanding how to choose effective words and imagery for your website or brochure, or using EQ in your social media strategies.

This overview enables you to design your own learning path for using EQ—starting with a good understanding of who your target EQ types are.

What is EQ?

Developed for the CTC, the Explorer Quotient®, or EQ, is an innovative market segmentation system that puts the power of high-quality, primary market research at your fingertips.

Market segmentation is a marketing analysis technique that groups customers into "segments" based on common criteria such as demographics, geography, interests and travel behaviours. This allows marketers to identify and understand the segments that are most likely to align with the product or experience they are selling.

EQ's market segmentation is based on the science of psychographics, an evolution of demographics. Rather than segmenting travellers into groups based on age, income and origin, psychographics looks deeper at people's social values and views of the world. These are powerful drivers of purchasing and travel decisions. EQ brings this all together, providing a comprehensive picture of travellers' demographics, origins, behaviours and motivations—*plus* their social and travel values—defining them in different psychographic groups called Explorer Types.

Explorer Quotient® and EQ® are registered trademarks of the Canadian Tourism Commission.

Before you begin...

Need a quick refresher on EQ? The [EQ video](#) provides a quick overview of how EQ was developed along with insight into its EQ types.

Before using the EQ Toolkit, it's a good idea to become familiar with the [EQ Profiles](#). This reference guide will help you to understand the characteristics of different traveller types, including the personal values, attitudes and travel motivations that affect their purchasing decisions.



**All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.

Get ready to learn

Here are some ideas to prepare you for this learning experience and for implementing the ideas that result from it.

Gather your team together

Consider a team approach when learning how to use EQ. Gather together a group of staff members and use this collective brain power to work through the modules and brainstorm answers to the questions in the worksheets. The resulting ideas will be well supported throughout the organization.

You may also want to include others who care about your organization. Involving suppliers, for instance, will ensure that they understand EQ and are invested in the changes you make. Customers are another source of brain power—no one knows better what it's like to experience your product!



Be creative

Learning can be fun, particularly when approached creatively. Think of ways to engage your staff and/or suppliers in learning about EQ. Have each person adopt an EQ type persona for a day (after studying it in the [EQ Profiles](#)) and become the team expert on that type as you work through the modules. Use role playing to get inside the head of your best customers. Try changing the learning environment: for example, decorate your meeting room with huge pictures of your customers enjoying the best aspects of your product to inspire your team.

Develop an implementation plan

As you work through the modules, you will be flooded with wonderful new ideas for changes to your product and marketing strategies. But be realistic—change needs to be managed and at a pace that your organization can handle. Create a one- to three-year implementation plan and give someone in your organization the responsibility for keeping the plan alive. Start with small—yet impactful—changes that will give the organization a boost as it starts its EQ-inspired journey into the future.

Invest staff with the responsibility for making it happen

Every staff member, from the front desk to the back office, will eventually find that EQ affects his or her job. The organization will become exceptionally customer-centric. Sales people will choose trade shows that are a match for their target EQ types' values. Informed by EQ, administrators will set budgets according to client priorities. In team meetings, you may challenge your staff members to report on the ways in which EQ has changed how they perform their jobs. You'll find the enthusiasm may be infectious!

Now, start the EQ learning journey

Do you know who your best customers are?

Identifying and understanding your best customers will help you improve your product development and positioning to better meet the needs of your customers.

EQ can help you determine which of the EQ types are a good match for your product or experience offer. Once you know your target EQ types, you will be ready to tackle any product development or marketing challenge.

That's why [Determine Your Best Customers Using EQ](#) is the foundational module of the EQ Toolkit.

[Determine Your Best Customers Using EQ](#) will lead you through a step-by-step approach to finding your target EQ types—starting with identifying your organization's top selling points and matching them with the appropriate EQ types.

A bird's-eye view of the other EQ Toolkit modules

Fine-tune Your Product Using EQ

Rethink your product offer by looking at it through the eyes of your best EQ customers. Generate ideas based on what they are looking for in a vacation, and boost your product's appeal. Develop an experience offer that they can't (and won't) resist!

Package Experiences Using EQ

Hone in on your target EQ types' travel preferences, to develop an experience-based package with customized appeal. Choose a theme to unify and a core feature to anchor this experience. Then build, name and price the package based on your types' values.

Describe Your Experience Using EQ

Define and write compelling descriptions of your experience, and align it to the values and travel preferences of your target EQ types. Learn tips to attract your types' attention and entice them with your call to action!

Assess and Choose Imagery Using EQ

Use the EQ lens to choose imagery that will capture your target EQ types' attention. Discover how images can play a critical role in communicating the excitement and appeal of your product or experience to your target EQ types.

Promote and Sell Using EQ

Boost profits by creating effective promotional messages that truly resonate with your best customers. Learn tips to influence the decision-making process of your target EQ types and close the sale faster.

The next step is up to you!

Here's what you can expect within each module

A step-by-step guide

Whether you are working with a team (highly recommended) comprised of staff members, suppliers, customers or even friends and relatives or working on your own, each module is designed to lead you through a logical thinking process in applying EQ principles to different aspects of your operation.

Worksheets

All of the modules contain one or more worksheets to help you translate the information that you learn into practical strategies for your tourism operation.

Practical examples

All modules reference practical examples in real business settings, enabling you to visualize how implementing the steps will look in an actual situation. This will help you to see EQ in action.

Suggestions for which module to tackle next

Although you may choose your own learning path in working your way through the modules, each module gives helpful suggestions for which ones might be a logical choice to work on next.

Photo credits:

Page 2: Shaw Festival Theatre, Stratford, ON (Cosmo Condina Photography)

Page 3: Wapusk Dog Sledding, MB (Canadian Tourism Commission)

Page 4: Writing-on-Stone Provincial Park, AB (Travel Alberta)

A salute to our EQ stars

Here's a list of Canadian tourism organizations featured in the EQ Toolkit modules. A big thanks to them for sharing their success stories on using EQ and discussing how EQ has made a difference in their operations.

- Alpine Helicopters, Alberta
- Cape Race Cultural Adventures, Newfoundland & Labrador
- CN Tower Edgewalk, Ontario
- Earth Rhythms at Riding Mountain National Park, Manitoba
- Great Divide Nature Interpretation, Alberta
- Great Spirit Circle Trail, Ontario
- Head-Smashed-In Buffalo Jump, Alberta
- Heritage Park Historical Village, Alberta
- Remington Carriage Museum, Alberta
- Snowy Owl Tours, Alberta
- The Deakins on Mountainview B&B, Ontario
- Tigh-Na-Mara Seaside Spa and Resort, British Columbia
- View to a Thrill, Ontario

We want to hear from you

If you are using EQ for any aspect of your enterprise, drop us a line to tell us about it. Email us at experiences@destinationcanada.com



Ready? Now start learning!

Jump into [Determining Your Best Customers Using EQ](#) and start your learning journey!

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Determine Your Best Customers Using EQ

By identifying your tourism operation's best customers you will be well positioned to develop and market customer-centric products that are focused on meeting your guests' needs and expectations.

In this foundational module of the EQ Toolkit, you will learn:

1. A step-by-step methodology for determining your tourism operation's best EQ customers, using different approaches to suit your learning style.
2. Where to go from here—explore the other modules in the EQ Toolkit, plus find out about other great CTC resources that can help you better integrate EQ into your tourism operation.

The most competitive tourism operations are the ones that understand who their best customers are, what they want to buy and how to communicate with them.

EQ, backed by extensive market research, is an effective tool for you to use to determine which of the EQ types your operation is mostly likely to attract. This inherent magnetism between your operation's best qualities and what certain customers are looking for in a tourism product makes those customers your "best customers".

Once your best customers are determined, you will be ready to move on to the next modules in the EQ Toolkit. These will help you fine-tune your product and marketing strategies to better match these customers' values and interests.

Let's get started with a step-by-step approach to determine your best customers.

Before you begin...

Review the introductory [EQ video](#)* to learn more about the Explorer Quotient or EQ—what it is and why this type of market segmentation is so powerful for your marketing and product development.

You will need the [EQ Profiles](#) to complete the exercises in this document.

*All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.



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Step 1: Review your top selling points

Before you begin, spend some time thinking about your tourism operation: What are its top selling points? A number of sources can help with your research, such as:

- Existing brochures and other print/online materials that describe your product or experience
- Comments by customers in your guestbook, surveys and/or online reviews
- Discussions with staff, suppliers and/or other stakeholders.

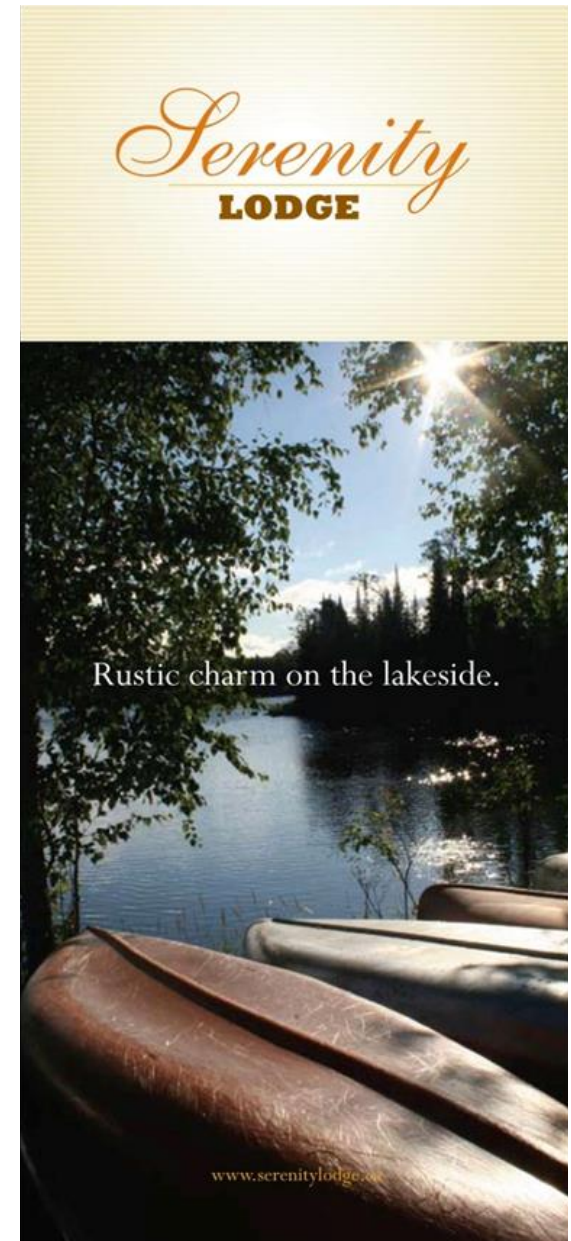
Example: Serenity Lodge's selling points

Here's an illustration of how to identify an operation's selling points. We'll start with examining a brochure for a fictitious Canadian wilderness lodge. The brochure text might read as follows:

Located in the heart of a provincial park, Serenity Lodge provides guests with the opportunity to discover nature in a peaceful setting. This family-run resort has a dozen charmingly rustic, lakeside log cabins, all of which feature a shared lounge with comfortable chairs and couches around a wood-burning fireplace. Each cabin has a television, phone, and coffeemaker. Swim, sail or canoe on the lakes, or enjoy a hike through the woods and along the lakeshore. In the evening, dine in our heritage dining room. Other activities include biking, tennis, fishing, sauna, canoeing and kayaking.

By picking out key words and phrases from the brochure and by checking comments made directly to staff, as well as those written in the guestbook and online, it is possible to identify Serenity Lodge's top selling points:

- Its park setting for nature discovery and exploration
- Cabins that are charmingly rustic, peaceful and comfortable
- Lakeside location
- Easy access to outdoor activities like swimming, sailing, hiking, canoeing, kayaking, sauna, fishing, tennis, and biking.



Step 2: Describe your current customers

Once you have assessed your operation's top selling points, it's time to take a look at the customers you are currently attracting. Then, focus in on what you know about them and list the following:

Origin: What country and region are they from?

Demographics: What are their ages, incomes and education levels? Where are they in their life stage? For example, are they students at home, young families, or empty nesters?

Travel Behaviours: How do they like to travel? For example, do they arrive in organized tours, or independently in their own vehicles? Do they like to travel with young children, in adult-only groups or on their own?

Now, let's start using EQ to gain a deeper understanding of your customers.

Gain new customer insights using EQ

The [EQ Profiles](#) are your key to gaining insights into your customers' travel and social values—two important building blocks to EQ—plus important information on demographics and experience appeal.

By adding this information to what you already know about your best customers (such as origin and demographics), EQ will help you create a more comprehensive picture of them.

Social values are a fundamental part of a person's belief system and are generally formed early in life. These values act as powerful lifelong influencers on decision-making.

Travel values speak to why people travel—and what types of travel are important to them.

Experience appeal describes the types of activities and experiences certain EQ types rate as being appealing things to do while on a vacation.

Click on the image to download the [EQ Profiles](#).



Step 3: Study the EQ Profiles

After you have described your current customers, take some time to become familiar with the [EQ Profiles](#), as this document will be a basic research tool as you progress through the EQ Toolkit.

Within [EQ Profiles](#), the CTC has identified target types that are best suited to Canadian products and experiences, presented in two sections. Section One gives you insights into Free Spirits, Cultural Explorers and Authentic Experiencers as global EQ types. Section Two gives you insights into target EQ types in Canada, the US and each of the CTC's international markets. The latter is useful for tourism operations that have identified certain countries as their prime markets.

Each type has been profiled in two pages that highlight demographics, social and travel values, experience appeal factors, last trip behaviour and trip-planning sources, as well as tips on product development and marketing.

Appended to the end of the [EQ Profiles](#) are glossaries that further define each of the social and travel values referenced within the document.

Step 4: Match your product or experience to the right EQ types

The next step is to determine the EQ types that best match the products or experiences you offer. Try more than one approach to determine the one that works best for your operation.

With each approach, you should initially focus on your operation's core product offer. You may also decide to repeat the matching exercise with other products or experiences that you offer, especially if you know that you are attracting a different type of customer for each one.

Approach 1: intuitive approach

This option will appeal to those who prefer a more instinctive approach to product matching.

1. Compare your operation's selling points to the EQ type profiles. If you have not identified a specific country as the primary origin of your customers, you may want to start with the global profiles in Section One of the [EQ Profiles](#). If you have identified a country, start with that country in Section Two.

Be sure to consider all sections of the profile (demographics, social values, travel values, experience appeal, trip and planning preferences, etc.) as these are all important aspects to the composition of the EQ type.

2. Based on this information, determine which EQ types best suit your product offer. You may want to decide on a primary type as well as one or two secondary types.

Intuitive approach example: Serenity Lodge

After identifying Serenity Lodge's top selling points, we can now assess its best EQ customers. Upon checking the lodge's customer information files, its guest book and talking to staff, it is apparent that the lodge's best current customers are mature couples and families who are looking for a quiet, easygoing getaway that is close to nature. Most of them come from within Canada and love to combine a relaxing vacation with soft outdoor adventure.

After reviewing the [EQ Profiles](#) for Canada and comparing them to the description of who is actually visiting the lodge, it becomes clear that Canadian No-Hassle Travellers and Rejuvenators are the lodge's best matches.



Approach 2: scoring approach

This is a good option for those who prefer a more systematic approach to determining their best EQ customers.

1. Identify your current best customers' origin country and write it in the top left cell of the worksheet. Study the [EQ Profiles](#) for that country and fill in the left column of the worksheet with the following information:
 - Your current best customers' demographics
 - The social and travel values that best match your product or experience (see the glossaries appended to the [EQ Profiles](#))
 - Your product's top selling points.

- Using the [EQ Profiles](#), compare your current best customers' demographics to the EQ types for your target country. Working from left to right across the worksheet, place an ↑ next to the EQ types that match those demographics. For those EQ types that are not a match, leave the space blank.
- Using the legend, rate the social and travel values that best align with your product according to the strength of that value for each of the EQ types. (If the [EQ Profiles](#) do not provide information on the value you are looking for, leave the space blank or rate according to your best judgment.)
- Rate your top selling points in a similar fashion.
- Add the "up" arrows and subtract the "down" arrows in each column to determine the total score for each type. The types with the highest scores are your target EQ types.

Legend

Extremely high appeal	↑↑↑
Very high appeal	↑↑
High appeal	↑
Neutral/don't know	blank
Low appeal	↓

Free Spirits	FS
Cultural Explorers	CE
Authentic Experiencers	AE
Personal History Explorers	PHE
No-Hassle Travellers	NHT
Rejuvenators	REJ
Gentle Explorers	GE

Example of scoring approach: Head-Smashed-In Buffalo Jump, Alberta



Designated as a UNESCO World Heritage Site, Head-Smashed-In Buffalo Jump (HSIBJ) in southwest Alberta is one of Canada's premier historical attractions. The interpretive centre features exhibits and educational programs focused on archeological evidence of early aboriginal life in the area and the ancient buffalo jump site. Tours are led by authentic Blackfoot guides who provide information and stories about the site and history of the Blackfoot people.

By scoring HSIBJ in the worksheet below, we can determine that Cultural Explorers and Authentic Experiencers are the best EQ customers for this attraction.

Product/experience match scoring – Example	FS	CE	AE	PHE	NHT	REJ	GE
Target country: Canada							
HSIBJ's current visitor demographics							
Their household income is average for Canadians		↑	↑	↑	↑	↑	↑
Their education level is high school and university	↑	↑	↑	↑	↑		↑
The average age of the visitor to HSIBJ is 51		↑		↑	↑	↑	↑
Social and travel values associated with HSIBJ							
Culture Sampling (believe other cultures have a lot to teach us)	↑	↑↑↑	↑↑↑				
Unstructured travel (most people who visit the region do it via independent vehicles)		↑↑↑	↑↑↑		↓↓	↑↑↑	↓↓
Historical travel	↑	↑↑↑	↑↑↑		↑	↓↓	↓↓
Nature travel (it is in a spectacular natural setting)	↑↑	↑↑↑	↑↑	↑↑	↑↑	↑↑↑	↓↓
HSIBJ top selling points							
Learning about ancient aboriginal culture		↑↑↑	↑↑↑				
Visiting an archeology site		↑↑	↑↑				
Available in a short day trip from several centres	↑	↑			↑	↑↑	
Visiting a historic site (UNESCO WHS)	↑↑	↑↑	↑↑↑		↑↑	↑	
Score	8	23	21	5	7	9	-3

Approach 3: using the EQ Quiz

This option makes use of the online EQ Quiz, accessible either through the Canadian Tourism Commission website (www.canada.travel/EQ) or the website of a participating destination marketing organization. Carry this out at the height of your season to obtain as large a customer sampling as possible.

Customers can take the Quiz in one of two ways. The first approach is to invite visitors to fill out the Quiz online via computers or hand-held devices provided onsite. Customers then tell the staff what their EQ type is in return for a small reward, such as an itinerary created for that EQ type. The second approach is to directly quiz customers in face-to-face surveys conducted by staff and/or volunteers. The staff would then manually enter the responses into the online quiz to obtain the customer's EQ type.

We wanted to know who was coming to the Park and [after using the EQ Quiz on-site] were somewhat surprised to find out that our number one visitor was the Free Spirit...the second was the Cultural Explorer.

Sandra Kam, Manager of Marketing & Special Events, Heritage Park Historical Village, Calgary, AB

Watch the video "[EQ Stories from the field: Heritage Park Historical Village](#)," in which Sandra relates the Park's EQ story.



What's next?

Once you have established which EQ types are your best customers, you are ready to apply this knowledge to your product development and marketing. The rest of the modules in the EQ Toolkit are designed to provide you with a number of learning options. [Fine-tune Your Product Using EQ](#), the next module in the Toolkit, will help you plan changes to boost your product's appeal for your best customers, based on their values and preferences. For example, Serenity Lodge may position itself as a "technology-free zone"—no phones, TVs or other technology—to enhance its selling point as a complete getaway for No-Hassle Travellers. The lodge may also amplify its all-inclusive elements to provide visitors with a more hassle-free experience. See the next module to find tips you can apply to your own operation.

Keep exploring!

The graphic below is a guide to the modules in the entire toolkit. Once you have completed [Determine Your Best Customers Using EQ](#), you are ready to choose any of the remaining modules as your next learning experience.

In addition to the EQ Toolkit, the Canadian Tourism Commission offers you a wealth of other helpful learning resources, including the [Experiences Toolkit](#), case studies and training video library. Keep exploring our [online resources](#).

Photo Credits:

Page 1: Quebec Winter Carnival, QC
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Page 4: North Nahanni Naturalist Lodge, NWT
Asymmetric/Jason Van Bruggen

Page 5: Head-Smashed-In Buffalo Jump, AB
Canadian Tourism Commission

Page 6: Heritage Park Historical Village, Calgary, AB

EQ® Toolkit

Determine Your Best Customers Using EQ

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Appendix: Worksheet

Use this worksheet to determine your best customers based on Step 4, Approach 2.

After identifying your current best customers' origin country and studying the [EQ Profiles](#) for that country (see steps 2 and 3 in this module):

1. Identify your current best customers' origin country and write it in the top left cell of the worksheet. Then fill out the rest of the left column.
2. Using the [EQ Profiles](#), compare your best current customers' demographics to the EQ types for your target country. Working from left to right across the worksheet, place an ↑ next to those EQ types that match those demographics. For those EQ types that are not a match, leave the space blank.
3. Using the legend below, rate the social and travel values that best align with your product according to the strength of that value for each of the EQ types. (If the [EQ Profiles](#) do not provide information on that value, leave the space blank or rate using your best judgment.)
4. Rate your top selling points in a similar fashion.
5. Add up the "up" arrows and subtract the "down" arrows in each column to determine the total score for each type. The types with the highest scores are your target EQ types.

Legend

Extremely high appeal ↑↑↑

Very high appeal ↑↑

High appeal ↑

Neutral/don't know blank

Low appeal ↓

Product/experience match scoring – Worksheet							
Target Country:	FS	CE	AE	PHE	NHT	REJ	GE
Demographics (of your current best customers)							
Social and travel values (match to your product/							
Your top selling points							
Score							

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Fine-tune Your Product Using EQ

In this module, you will learn:

1. A step-by-step methodology for:
 - Determining which customer values to concentrate on as you consider making changes to your product
 - Reviewing your product through an EQ lens
 - Generating new ideas for product changes and determining which ones to attack first.
2. Where to go from here—explore the other modules in the EQ Toolkit, plus find out about other great CTC resources.

You already know which EQ types are your best customers. In this document, you will use EQ research to introduce changes in your product development planning—from minor tweaking to major changes—to improve its alignment with your best customers' values and expectations.

The result will be a product that holds even more appeal for your best customers—resulting in the potential for increased sales and improved customer advocacy.

Let's get started with a step-by-step approach to fine-tuning your product with EQ.



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Before you begin...

Know which EQ type(s) you are targeting. If you have not determined your best customer or target types, you can do so through the exercises in [Determine Your Best Customers Using EQ](#), the first module in the EQ Toolkit.

If you need to refresh your knowledge of what EQ is all about, review the [EQ video](#)*.

You will need the [EQ Profiles](#) to complete the exercises in this module.



*All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.

Step 1: Review your best EQ customers' values

Start by gaining a better understanding of your best EQ customers' values, travel motivations and travel behaviours.

If you have identified more than one EQ type as your best customer (see [Determine Your Best Customer Using EQ](#)), it is useful to review the values they hold in common so that you can plan product changes that have the widest appeal and make the best use of your resources. One way to do this is to review the four broader EQ segments within which the EQ types have been grouped according to a strong common value set. These segments are:

Learners: Authentic Experiencers, Cultural Explorers, Personal History Explorers and Cultural History Buffs

Enthusiastic Indulgents: Free Spirits, Social Samplers

Familiarity Seekers: Gentle Explorers, No-Hassle Travellers, Group Tourists, Virtual Travellers

Escapists: Rejuvenators.

For example, if your best EQ customers are Authentic Experiencers and Cultural Explorers, you can immediately conclude that your target customers hold a strong common value for *learning*.



Next, use the [EQ Profiles](#) to make a list of your best EQ types' common social and travel values as well the top activities that make a travel experience appealing to them.

Let's say that your target geographic market is Canada for Authentic Experiencers and Cultural Explorers. By checking the Canada section of the [EQ Profiles](#), you can list the following shared values for these two EQ types:

Social Values:

- Cultural sampling—they feel that other cultures have a lot to teach them
- Personal control—they want control and autonomy in their lives

Travel Values:

- Historical travel—they love to learn about history through their travels.

Experience Appeal:

- Wildlife and marine-life viewing
- Dining at restaurants offering local ingredients
- Visiting parks to view nature/wildlife and participate in adventure experiences

It's also important to note the common demographic and travel behaviour characteristics. For example, although Authentic Experiencers are, on average, slightly older than Cultural Explorers, both types tend to travel as two adults without children.

Note—If your target EQ types belong to different EQ segments (e.g., Free Spirits and Cultural Explorers share some common values but seek distinctly different experiences), you may want to review why you have selected both as your best targets. Do you have two separate product offerings, each of which appeals to distinctly different EQ types? If so, you should follow this process for each offering and its EQ type independently.

Step 2: Use an EQ lens to review your product

Your tourism operation has a core product or experience offer that is the focus of your marketing message. It is also possible that you offer a number of supplementary programs that contribute to your core product's appeal. For example, the core product offer for an eco-lodge may be "relaxing in nature," but it could also offer a spa experience and guided walking program.

While the following steps in this module focus on your core product, you may choose to repeat the exercise for each of your supplementary programs.

Use your imagination to "become" one of your target EQ types. Examine your product offer through this type's eyes, and ask yourself:

Which aspects of my product are most appealing to my target EQ types?

Which aspects are least appealing?

EQ is a great tool to help guide your decision-making in emphasizing and building upon those aspects of your operation that hold great appeal. It also helps you to downsize or even eliminate aspects that hold little appeal—allowing you to be more strategic in the use of precious resources.

Step 3: Generate ideas for updating your product offer

So far, you have zeroed in on a list of values, demographics and travel behaviours to help increase your appeal to your target EQ types, and have done a high-level analysis of your core experience's EQ appeal. Now you can begin to generate some ideas for changes to your product that will boost its appeal for your target EQ types.

This worksheet has been developed as an example of how this can be done. It is based on a hypothetical eco-resort, located near a park, whose best EQ customers have been identified as Authentic Experiencers and Cultural Explorers. The exercise evaluates the resort's core product/ experience: eco-friendly accommodations close to nature.

In a brainstorming meeting with staff members, the resort was able to fill out the worksheet with lots of great ideas for product development by following these steps:

1. Common demographics, values and travel behaviours for the resort's two target EQ types (as identified in Step 1) were listed in the left column in the form of statements.
2. The resort's core product/experience was assessed and rated by the staff according to its strength in addressing each statement.
3. The far right column captured staff members' ideas for how to boost the resort's ratings with respect to each statement.

Now it's your turn! A worksheet has been provided in Appendix B of this module that you can use for your own brainstorming exercise.

Product fine-tuning idea – Example

Target EQ types: Authentic Experiencers and Cultural Explorers

EQ segment: Learners

Common demographics/ values/travel behaviours (in the form of statements)	Rating of the resort's core product/experience for each statement 5 = strong appeal 1 = weak appeal	Product/experience ideas to boost the rating
They enjoy learning while travelling.	4	Increase the number of hands-on opportunities for learning while visiting the resort.
They tend to travel as two adults without children.	2	Provide more adult-focused programs and/or services.
They feel other cultures have much to teach them.	2	Invite a local theatre group to stage a dinner theatre at the resort featuring authentic local characters.
They are focused on maintaining control and autonomy in their lives.	3	Allow guests more choices in designing their resort stay, such as choosing their own check-out time (within a time range).
They love to learn about and absorb themselves in the history and culture of the places they visit.	3	Partner with the local community centre to hold more community events at the resort. Provide "Did you know?" brochures in guests' rooms, featuring highlights of local history and where to go for these products/experiences.
Experiences including wildlife or marine life viewing hold great appeal for them.	4	Continue to provide binoculars and wildlife guidebooks for guests to use on their hikes or while kayaking.
They enjoy dining in a restaurant with local ingredients.	3	Introduce market or farm tours with the resort's chef followed by a tasting meal featuring dishes made with local foods.
They enjoy visiting parks to view wildlife and surrounding nature and/or participate in adventure experiences.	3	Provide a cross-country ski rental program and shuttles into the nearby park. Provide opportunities for guests to meet and talk with the park's conservation officer about its wildlife.

Step 4: Prioritize your ideas

Now that you have lots of ideas, it's important to determine which ones should be addressed in the immediate future and which ones can be integrated into your operation over time.

Evaluate each of the ideas by assessing them against the following questions:

What is the relative strength of each of the ideas in meeting the needs and expectations of your target EQ types? Make a list with the strongest one at the top and the rest in descending order.

How well does each idea fit within your tourism operation's overall mandate and theme?

What is the level of financial and/or human resource investment—high, medium or low?

What is the potential of partnering with another company to share costs or add expertise?

Are there any significant issues (permits, legal, land use, etc.) that will pose a serious obstacle to implementing the idea?

Once you have completed your evaluation, you will be in a position to rank each idea for implementation in the short, medium or long term, and to create a more detailed implementation plan for each.

Photo credits:

Page 1: St. Lawrence River Dinner Cruise, QC (Canadian Tourism Commission)

Page 4: Tigh-Na-Mara Spa, Parksville, BC (Tigh-Na-Mara Seaside Spa Resort and Conference Centre)

Page 5: Deakins' on Mountainview B&B, Killabe, ON (Don and Mary Helen Deakin)

We like to find ways for our guests to have a more personal, emotional connection to our resort. For example, we have a corporate guest who loves to stay at the resort as many as 45 times a year, as it appeals to her as a Cultural Explorer. To reward her for her patronage, we created her own personalized bathrobe that she can either take away with her or leave at the resort to be laundered for her next stay.

Paul Drummond, General Manager,
Tigh-Na-Mara Seaside Spa Resort &
Conference Centre, Parksville, BC



What's next?

Now that you have some great ideas for fine-tuning your product, think about taking it to the next level—by turning it into an experience! Experiential tourism has the potential to add value to your customers' visits and increase your return on investment dollars. The CTC's [Experiences Toolkit](#) provides a step-by-step guide to developing and staging great experiences.



Keep exploring!

In addition to the EQ Toolkit, the CTC offers you a wealth of other helpful learning resources, including case studies and a training video library. The graphic below is a guide to the modules in the entire EQ Toolkit. Choose any of the remaining modules as your next learning experience.

Keep exploring our [online resources](#).

EQ® Toolkit

Determine Your Best Customers Using EQ

Fine-tune Your Product Using EQ

Package Experiences Using EQ

Describe Your Experience Using EQ

Assess and Choose Imagery Using EQ

Promote and Sell Using EQ

Appendix A: Product fine-tuning example—Deakins' B&B

The Deakins' on Mountainview B&B is a lovely farmhouse located in a picturesque area just outside of Algonquin Park in Ontario, part of a farm that is a full production centre for maple syrup. Visitors staying at the B&B are invited on guided tours of the farm where they learn about the production process from tree to syrup—adding significant value to their B&B stay and resulting in many positive testimonials.

Don and Mary Helen Deakin, who own and operate the B&B, understand that enhancing their experience offer to better align with the expectations of their guests is the key to achieving their future goal of increasing their visitors' length of stay. To that end, the Deakins became interested in understanding their customers better through EQ.

After taking part in a CTC EQ Bootcamp workshop and studying the [EQ Profiles](#), Don and Mary Helen determined that the B&B holds great appeal for Cultural Explorers and Authentic Experiencers, through values such as:

Cultural immersion: Maple syrup farming is part of Ontario's cultural heritage—guests have an opportunity to interact with their hosts and other farm workers.

Importance of spontaneity: Each tour holds an element of surprise, like the unexpected discovery of a beaver pond and learning that beavers play an important role in the health of the maple forest.

Nature travel: Guests have a chance to go far beyond simply observing nature—they get to interact with it.

Ecological concern: Part of the learning experience is the message that caring for the trees will not only result in better quality maple syrup, but is also good for the health of the earth.



After that, Don and Mary Helen determined that they could introduce a number of changes to their operation that would increase their guests' access to engaging, hands-on experiences and opportunities to become more immersed in maple syrup culture. For example, when they arrive, guests are treated to a maple syrup sampling. Guests pick their favourite from a selection of three kinds of maple syrup: light, medium and dark. This leads to a discussion around the story of the maple tree, as the syrup taken from the tree at the end of the season is considerably darker than at the season's beginning. This theme is continued in an informal walking tour of the farm's maple forest and an invitation to guests to plant their own maple tree.

The Deakins have revamped their website, making it more interactive through social media. By inviting their guests to contribute to their blog with photos, videos and stories of their stay, Don and Mary Helen have made it possible for guests to start interacting with their hosts and other guests before they arrive and to continue doing so long after they have departed.

Our experience with the EQ Toolkit was wonderful—we are particularly interested in increasing the quantity and quality of experiences that engage and immerse our visitors in the region's culture.

Don Deakin, Co-owner and Operator of Deakins' on Mountainview B&B, located near

Over time, the Deakins have plans to further boost the experience for Cultural Explorers and Authentic Experiencers by adding more opportunities for guests to get involved in the maple syrup production process, from picking a tree to drill for sap to creating some maple product to take home as a souvenir—just one of the many memories of staying with the Deakins!



Appendix B: Worksheet

Use this worksheet to generate product/experience development ideas based on information from the [EQ Profiles](#). Focus on your core product/experience first. You may also wish to repeat the exercise with any of your supplementary programs and/or services.

1. Write your target EQ type(s) at the top.
2. In the next row, write the name of the EQ segment(s) the type(s) belong to (see Step 1 for a list of segments).
3. In the left column, list the demographics, values and travel behaviours that are common to your EQ target types (as identified in Step 1) in the form of statements (see the worksheet on page 3 for examples).

If you are targeting a single EQ type, identify that type's top demographics, values and travel behaviours in the form of statements.

4. In the middle column, rate your core product/experience's strength in addressing each of the statements listed in the first column.
5. In the far right column, list your ideas for how to boost the product/experience's rating according to the needs and expectations of your target EQ type(s).

Product fine-tuning idea – Worksheet

Target EQ type(s):

EQ segment(s):

Common demographics/ values/travel behaviours (in the form of statements)	Rating of core product/experience for each statement 5 = strong appeal 1 = weak appeal	Product/experience ideas to boost the rating

Determine Your Best Customers Using EQ

Fine-tune Your Product Using EQ

Package Experiences Using EQ

Describe Your Experience Using EQ

Assess and Choose Imagery Using EQ

Promote and Sell Using EQ

Package Experiences Using EQ

Using EQ to design customer-centric, experience-based packages can help you increase the value of your tourism operation and your region for your target EQ customers. In this module, we offer a step-by-step methodology to help you:

1. Identify an EQ type as a target for your experience package
2. Identify that type's EQ preferences for travel package components
3. Brainstorm package components that make sense for your operation
4. Build and price a package around a central theme.

Traditional packages combine activities, accommodation and/or transportation, offering these at a lower price than customers could secure individually.

In contrast, experience-based packages are more than a good deal—they are based on providing memorable experiences that enrich travellers' lives.

EQ helps you take packaging one powerful step further.

Experience-based packages designed around your best EQ customers' social and travel values will be highly enticing to those particular types of travellers— influencing purchase decisions, sales, delighted customers, potential for repeat business and positive word of mouth.

Let's get started with a step-by-step approach to packaging experiences using EQ.



Explorer Quotient® and EQ® are registered trademarks of the Canadian Tourism Commission.

Before you begin...

Know which EQ type(s) you are targeting. If you have not determined your best customer or target types, you can do so through the exercises in [Determine Your Best Customers Using EQ](#), the first module in the EQ Toolkit.

If you need to refresh your knowledge of what EQ is all about, review the introductory [EQ video](#)*.

You will need the [EQ Profiles](#) to complete the exercises in this module.



*All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.

Step 1: Identify your EQ target

Before you build your experience-based package, determine which of your target EQ types will be the target customer for this offer. Designing the package with the social and travel values of this customer in mind will also make the package appealing to other EQ types with similar values.

Step 2: Consider your EQ type's preferences

By studying the [EQ Profiles](#) for your target EQ type, you can determine your target type's preferences for various components of the package. For example, in choosing accommodations, a Free Spirit or a Personal History Explorer will prefer the luxury of a branded hotel. In contrast, Cultural Explorers and Authentic Experiencers care less about brand or being pampered in a commercial hotel—they prefer accommodations that reflect the area's unique history and culture. They are also concerned about the health of the planet, so an eco-lodge would work for them.

This chart is an example of various package components among Free Spirits, Cultural Explorers and Authentic Experiencers. If your EQ type is not included here, use the [EQ Profiles](#) to make a similar chart for your EQ type(s).

Armed with an understanding of your type's preferences, you are ready to start designing a highly appealing packaged experience.

Package component preferences by EQ Type (Canadian market)

Component	Free Spirits	Cultural Explorers	Authentic Experiencers
Accommodations	Commercial, international brand, boutique hotels and luxury hotels Spa services	Country inns, B&Bs, eco-lodges and other accommodations that reflect the area's culture/personality such as farm stays, guest ranches	Country inns, B&Bs, eco-lodges and other accommodations that help them connect with the local history and culture
Food and drink	Gourmet and high-end restaurants	Unique dining experiences featuring local ingredients, tastings at wineries	Unique dining experiences featuring local ingredients, wineries for tours and tastings
Activity or program	Active participation in adventure and/or winter sports Entertainment, shopping Social events, festivals Activities they can do with their kids Wildlife/marine-life viewing (in the wild or in zoos/aquariums) Visiting parks, iconic historic sites and interpretive centres	Interactive, hands-on and immersive learning experiences Active adventure, nature and beautiful scenery Voluntourism Farmer's markets and small towns Wildlife/marine-life viewing Cultural festivals and outdoor street performances Food-related factory tours	Historical travel, low-impact activities, learning "Behind-the-scenes" experiences not available to mass tourist markets Opportunities for interacting with new cultures Parks for wildlife/marine-life viewing, adventure and interpretive centres Visiting small towns, historic sites, well-known wonders
Itinerary	Detailed itineraries that allow them to sample—and not miss the hot spots	Unstructured—they like to chart their own course Allow time for spontaneity	Unstructured, avoiding touristy situations and with time to do their own thing
Transportation	Multi-day tours by bus	Self-touring Small group shuttles	Self-touring Small group shuttles
Special	Access to WIFI is important—they love to share on social media	Love a surprise! Access to WIFI for sharing on social media or email	Love a surprise! Emphasize recycling and other sustainability options
Avoid	Farm stays, voluntourism, hostels	Multi-day guided bus tours, golfing, hunting	Nightclubs, lounges, motorcycling, group travel

Step 3: Brainstorm your experience components

Now that you understand what your target EQ types' travel preferences are, it's time to do some high-level imagining about what a great experience package would look like.

Think of your region from the perspective of your target EQ types. What attracted these customers to the region in the first place? What experiences are most appealing to them? How does your operation contribute to those experiences?

This worksheet provides an example of a brainstorming process from the perspective of a hypothetical restaurant located in a seaside town in Atlantic Canada. The restaurant's reputation for providing good quality, locally sourced heritage dishes has already attracted the attention of Cultural Explorers. Now, the restaurant wants to increase its appeal to this EQ type by packaging an experience that will increase yield and length of stay.

Gathering a group of staff members, clients, suppliers and potential partners, the restaurant led a brainstorming session to pose the three questions listed in the left column—with the resulting ideas listed in the right column. By the end of the session, the restaurant had some great ideas for the components of an experiential package for Cultural Explorers.

Once you have reviewed this example, gather your own idea team and start brainstorming! A blank worksheet and instructions can be found in Appendix B.

When you have some ideas around the components of an experience package that might appeal to your target EQ customers, you are ready to begin designing the package.

Experience package components — Example

Target EQ type: Cultural Explorers

1. From the perspective of Cultural Explorers, what differentiates your region as a great place to visit? What people, places and attractions best reflect the unique character of the region for them?

The local culture is unique—reflecting the sea and its Celtic heritage in dialect, stories and traditions.

This is a storytelling culture where stories are traditionally told around the kitchen table.

The incredible beauty and danger of the sea and the rugged landscape are known to be inspirational and awe-inspiring for guests.

2. What are the unique product strengths of your operation, both in meeting the values and expectations of Cultural Explorers as well as reflecting the unique character of your region?

Our restaurant is well-recognized for fresh, high-quality, locally sourced seafood and heritage recipes drawn from local culture.

Our suppliers share our passion for sustainably caught seafood.

Our restaurant is located close to the wharf where local fishers dock their boats—providing guests with opportunities to watch and socialize with them.

We feature local blueberries during the summer season, serving blueberry wine produced by a local winery and incorporating

3. Brainstorm a list of experience package components relevant to your operation that would appeal to Cultural Explorers.

Tasting heritage dishes and local food/beverages

Visiting the local farmers' and seafood markets

Small group berry-picking excursions

Visiting the local blueberry winery and tasting the wine

Participating in a lesson on how to cook heritage dishes

Staying at a small hotel, B&B or inn

Socializing with and hearing stories told by locals about local culture

Visiting restaurants with similar values (e.g., using locally sourced food, etc.) in other regional towns

Watching the fishing boats come and go from the wharf

Going to a local historical site to see how heritage dishes were originally prepared

Experiencing a Maritime kitchen party

Relaxing while watching and listening to the sea

Step 4: Choose a theme and a core feature for the package

A unifying theme for your package will tie all of the elements together, making the package more than the sum of its components and easier to market to your target EQ type. For example, in its desire to make its packaged experience appealing to Cultural Explorers, the restaurant (from Step 3) might determine that its theme will be "Exploring [the area's] culinary heritage" and include components that allow Cultural Explorers to experience local dishes and flavours through direct participation, self-guided exploration and interaction with local residents.

The package should also have one special feature or benefit at its core—an experience that is particularly appealing to your target EQ type. This will provide the anchor around which the other components can be packaged to extend and complement the core experience. In the case of the restaurant, the core experience might be a cooking class and tasting led by the restaurant's chef. The complementing components could be a tour of the local farmer's market, a voucher for a tasting at the local winery and a map of some culinary treasures in the area. It might also include a night's accommodation at a country inn where guests can relax and enjoy watching the sea.



Step 5: Build and name your package

In building your EQ-focused experience package, ensure that you pay special attention to planning the details, including those features that relate to your target EQ type's social and travel values. This will help you determine factors such as group size, method of transportation (e.g., tour bus vs. small vans), hands-on or family-style activities, time of year, etc.

Authentic Experiencers and Cultural Explorers, for example, will appreciate some unstructured time so that they have a chance to absorb, explore and reflect upon the experience.

Unanticipated surprises and memorabilia will also be a welcome part of any package for all types, adding value and the potential for fond memories. It's also a good idea to ensure that your guests have access to free WIFI at some point in order that they might share their enthusiasm for your experience with family and friends online.

Once the package is built, choose a catchy name for your package—using key words that will help you attract the attention of your target EQ type.

For building your experiential package, a useful resource is the CTC's [Experiences Toolkit](#), which provides more detailed guidance for developing and staging experiences.

Working with partners

Packaging experiences can be accomplished either by providing all of the components yourself, or by working with others to fill in the pieces that you may not have the resources or expertise to offer.

Working with others can be as simple as providing links to other tourism operations' programs on your website, or it could involve collaborating with multiple suppliers to present your package. Here are some key things to keep in mind when working with partners/suppliers:

- It's important for them to understand the EQ type you are targeting. Use the [EQ Profiles](#) to assist them in gaining this knowledge.
- Ensure that their product or service complements and provides added value (related to the EQ type's values as listed in the [EQ Profiles](#)) to the overall package theme and is equal in quality to your core experience.
- Make sure that the partner/supplier's product or service is also experiential in nature—that it engages visitors in a series of memorable travel activities, is revealed over time and helps the visitor make connections on a physical, emotional, spiritual, social or intellectual level.

Step 6: Set the price

By using EQ to build customer-centric packages, you are able to offer a solid value proposition that is directly linked to the preferences of your best customers. Together with the unique combination of products and services that make up your package, this "value-added" component helps you design an offer that is differentiated and hard to duplicate. As a result, you can price based on value, rather than simply competing on price against other tourism operations with similar offers.

Pay special attention to the social and travel values that are directly related to price. For example, Free Spirits place more value on getting the product and/or brand they are looking for, versus getting a discount. Cultural Explorers and Cultural History Buffs will shop around for the best price.

Regardless of their type, most consumers appreciate package prices that are all-inclusive. Keep in mind that your customers will be caught up in the experience, the quality of which could be damaged by periodically reminding them of their chequebooks.



What's next?

Once you have built your experience package, you will be ready to market it. There are several other EQ Toolkit modules that will help you create a description of your experience package, choose images, plus promote and sell it using EQ.

Want to know more? The CTC's [Experiences Toolkit](#) provides a step-by-step guide to developing and staging great experiences.



Keep exploring!

In addition to the *EQ Toolkit*, the CTC offers you a wealth of [other helpful learning resources](#), including case studies and a training video library.

Photo credits:

Page 1: Lighthouse Picnics, NL
(Canadian Tourism Commission)

Page 4: Great Cooks Corporate Cooking Class, NB
(Canadian Tourism Commission)

Page 5: PEI
(Tourism Prince Edward Island/Russell Monk)

Page 6: Alpine Helicopters, Canmore, AB
(Travel Alberta/Noel Rogers)

Snowy Owl Tours, Canmore, AB

EQ[®] Toolkit

Determine Your Best
Customers Using EQ

Fine Tune
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Package
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Using EQ

Describe
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Appendix A: Example

Heli-dogsledding in the Rockies: must love dogs!

Alberta's Rocky Mountains are one of Canada's prime destinations for Free Spirits, particularly for winter sports, due to the quality and range of products and experiences that are available—all against a backdrop of breathtaking scenery.

As president of Snowy Owl Tours, Connie Arsenault has watched her dogsled touring business grow over the past quarter of a century to become one of Alberta's most successful winter tourism offers. Her core experience includes a number of tours by dogsled through the Spray Lakes area of the Rockies and tends to attract couples in their 30s and 40s from both international and regional markets.

From an EQ perspective, the small group sizes and the close proximity to nature made Snowy Owl's core experience attractive to Authentic Experiencers and Cultural Explorers. However, the company also wished to attract another type of frequent visitor to the Rockies—one who loves winter adventure, likes to pack lots of activity into each travel experience and happily indulges when travelling. In EQ terms, this type of traveller is a Free Spirit.

With this in mind, Connie approached a local helicopter company to work with her to fashion a heli-dogsledding experience package ideally suited to this type of traveller from the United States, the United Kingdom and Canada. The combination of the luxury and thrill of an "in-the-air" helicopter flight with an "on-the-ground" experience of dogsledding would fit well with the Free Spirit's love of winter outdoor activities and enjoyment of nature.

"We wanted to create a truly northern experience for this traveller that integrates the sensation of being a Great Snowy Owl soaring high above the land with the experience of travelling over the snow, pulled by a team of huskies," says Connie. "This helps them see their lives in perspective while learning to love the backcountry as much as we do."

The package, named the *Flight of the Great Snowy Owl*, brings together each company's primary tourism offer and complementary expertise: Snowy Owl Tours' dogsledding adventure tours and Alpine Helicopters' heli-tours. Both operate out of Canmore, Alberta. The package includes a 25-minute flight to or from the dogsledding staging area, plus one of Snowy Owl's adventure tours that ranges from two hours to two days. Depending on the tour selected, the cost of the package starts at around \$400 per guest and accommodates between 70-80 guests per year, depending on weather conditions.



The partnership between Snowy Owl Tours and Alpine Helicopters is legalized through a contract, which is reviewed yearly. The contract outlines the roles and responsibilities of each party, and establishes protocols for standards and payments. As the primary contractor, Snowy Owl Tours settles the bookings and payments with the guests and pays Alpine for the services it provides.

For both companies, the relationship works well due to their shared commitment to common standards and values. For example, both companies are active in their local destination marketing organization and in the community. Both have a high degree of comfort in the other's commitment to safety standards and a solid belief in meeting the expectations of their guests.

"Working with Snowy Owl Tours gives us more variety in our operation," says Jo-Anne Kobelt of Alpine Helicopters, "and an opportunity to offer a follow-up experience for Free Spirits who want more after taking one of our sightseeing tours."



Appendix B: Worksheet

This worksheet will help you understand the region in which you operate and potential package components that work best for your operation and your target customer.

1. Write the name of your target EQ type in the space provided at the top.
2. Imagine your region through the eyes of your target EQ type. What would draw this EQ type to this region over anywhere else on earth? What is distinctive about the geography, people and culture?
3. Now think about your own operation. What features led you to select this EQ type as one of your best customers? Which of these align well with the unique character of the region?
4. Brainstorm a list of package components that would appeal to your target EQ type, relevant to your operation and the other tourism opportunities in your area.

Experience package components — Worksheet

Target EQ type:

1. From the perspective of your target EQ type, what differentiates your region as a great place to visit? What people, places and attractions best reflect the unique character of the region for this type?

2. What are the unique product strengths of your operation, both in meeting the values and expectations of your target EQ type as well as reflecting the unique character of your region?

3. Brainstorm a list of experience package components that would appeal to your target EQ type, relevant to your operation.

Determine Your Best Customers Using EQ

Fine-tune Your Product Using EQ

Package Experiences Using EQ

Describe Your Experience Using EQ

Assess and Choose Imagery Using EQ

Promote and Sell Using EQ

Describe Your Experience Using EQ

EQ is an effective communications tool that can help you better sell to your customers. Understanding which words and phrases to use when describing your experience—and communicating with your best customers—will increase the likelihood they will read, retain and act on your message.

In this module, you will learn:

1. How to identify words and phrases that will resonate with your customers' EQ type.
2. An approach to describing your experience for use in your marketing materials.

As a result, your communications are more likely to attract the interest of your target customers and influence the possibility that they purchase your experience.

This module lays out a four-step approach to identify the words and phrases that will best appeal to your target types according to their values:

1. Understand your target customer
2. Define the experience you are selling
3. Write the description of your experience
4. Tweak the description based on its context.

At the end of this module are two appendices:

- Appendix A—presents worksheets to use when completing the exercises in the module
- Appendix B—presents examples of structured descriptions the CTC has written for some of the experiences included in the *Canadian Signature Experiences* collection.

Before you begin...

Know which EQ type(s) you are targeting. If you have not determined your best customer or target types, you can do so through the exercises in *Determine Your Best Customers Using EQ*, the first module in the EQ Toolkit.

If you have completed the exercises in the first three modules you can build on the work you have done.

It is not necessary to have completed these exercises, but you will need to know the EQ type(s) you intend to target.

Have on hand the *EQ Profiles** for your target types.



*All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.

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Step 1: Understand your target customer

Turn to the [EQ Profiles](#) and find the target country and EQ type on which you are focusing.

Study the social and travel values, and list those that most relate to the type of experience you offer. Now think of other words that reflect these travel and social values and list them as well. Use your thesaurus—it can be very helpful in developing your lists.

To facilitate this exercise, use Worksheet 1 pictured here and provided at the end of this module.

Step 2: Define your experience

Now that you have a better understanding of your target EQ types and what motivates them, let's describe your experience in a way that will resonate with them. Use Worksheet 2 to work through this step.

The key outcome of Step 2 is to identify words and phrases that can be used to describe your experience in your marketing materials.

Three elements must be addressed in defining and describing the experience you are selling:

- Why does it appeal? What are the emotional triggers your experience addresses or satisfies?
- What are the key components of your experience?
- What is its unique selling proposition (USP)?

Each of these elements is described in more detail on the following page.

Understand your target customer – Worksheet 1	
EQ Type(s)	
List your EQ type's social values	
Words that reflect these social values	
List your EQ type's travel values	
Words that reflect these travel values	
Define your experience – Worksheet 2	
Experience Name:	
Why your experience appeals to your target customer	
Components of your experience (prioritize the listing of experience elements)	
Unique selling proposition (what differentiates your experience)	

Why work with values?

We like to think we make logical decisions. However, research shows 95% of our decisions are made using emotions, while only 5% of our decisions are driven by logic. For this reason, it is critical that your marketing materials focus on making emotional connections with your customers—especially up front, as it is the emotional connection that will help seize the attention of your potential customers.

The Power of the Emotional Brain



Source: Daniel Kahneman, Nobel Prize for Economics, 2002

Given that social values represent one's views of the world—and travel values address one's motivations to travel—words and phrases that resonate with your customers' values will have a higher likelihood of cutting through the clutter of the endless messages they receive.

Why does it appeal?

Think about the experience you offer as seen through the eyes of your target customers. In particular:

- Why would your target customers want to have this experience?
- How would your target customers feel during or after the experience?

Identify the adjectives and adverbs your target customers would use to describe the experience, and their feelings as a result of taking part in it. Remember to keep your customers' social and travel values in mind—look at what you wrote earlier in Step 1.

Think of the “-ING” words customers would use in describing their feelings about their experience: thrilling, exciting, relaxing, rejuvenating, learning, eye-opening, life-enhancing, inspiring and revealing are all possibilities. For further examples of “-ING” words and how they match to EQ types, refer to the *The “-ING” Thing & EQ*.

What are the key components of your experience?

What will your target customers be doing and *how* will they be doing it? For example, are they going to be learning something and if so, in what way will they learn? Be specific: is it through self-guided interpretive panels or audio guides, in a large group lecture or as a small group led by a guide? Is it a hands-on and immersive approach or a more removed and observational experience?

What is the *setting*? Is it outside or inside, winter or summer, urban or rural, farm or wilderness?

The “-ING” Thing* & EQ



The following are examples of “-ING” words that would appeal to some EQ types:

- **Free Spirits:** thrilling, exciting, socializing
- **Authentic Experiencers:** discovering, accomplishing
- **Cultural Explorers:** learning, connecting, immersing
- **Cultural History Buff:** in-depth learning
- **Personal History Explorer:** reconnecting
- **Rejuvenator:** relaxing, celebrating
- **Gentle Explorer:** observing, socializing, celebrating

* Source: Dr. Nancy Arsenault, The Tourism Café, 2012.

What is the *duration* of the experience? Is it multi-day with many components, or is it short and relatively contained? If there are multiple components, define and describe each one and indicate which ones provide the greatest impact on the experience's overall appeal. Answering these questions provides context for the experience.

Don't worry about writing beautifully at this stage—simply get the information down on paper. Remember to keep focused on the values and desired outcomes for your target customers.

What is your unique selling proposition (USP)?

What is it that differentiates your experience from those offered by your competitors? Think about the full experience, not just the activity or the infrastructure as these are likely things that many operators provide. While these aspects are important, differentiation is often achieved through how you deliver the experience and the feelings people have and relay to their family and friends.

Review the words you have used to describe the experience. Highlight and list the words/phrases that relate to the uniqueness of your experience.

If I see one more “99 well-appointed rooms” on another website as the only lure to differentiate a business—especially when they have a great experience—I think I’m going to throw myself off a bridge!

– Anonymous destination marketing organization colleague

Step 3: Write a description of your experience

Now that you have a list of words and phrases that describe the elements of your experience, pull them together using Worksheet 3 to write the description of your experience:

- Experience statement
- Activities and context
- Logistics
- Call to action

Applying this four-part structure will help readers quickly identify:

- Why they would want to buy your experience
- What they will be doing
- How much it costs and other details
- Where to get more information or how purchase it.

You will also find Worksheet 3 in Appendix A.

Write a description of your experience – Worksheet 3

Experience title	
Experience statement Why would they do this?	
Activities and context What will they be doing? For experiences with multiple activities, put more focus on those that are core to the experience and/or those that differentiate it.	
Logistics Where will they do it (start/end)? When can they do it? How much does it cost?	
Call to action How do they book/buy it or get more information?	

Experience statement

An experience statement is a short 50- to 60-word description that addresses why one would want this experience. It describes customer values, focusing on benefits and outcomes from the customer perspective. Another way to approach creating an experience statement is to think of it as the "elevator speech" you would give if someone asked about the experience—something that can be said in less than 30 seconds, and hooks potential customers so that they will continue to read or ask for more information.

- Experience statements use words that reflect the travel and social values of the EQ type, as well as emotional triggers (the benefits and feelings associated with your experience).
- The USP is often incorporated into the experience statement.

Activities and context

This section relates to what your potential customers can expect to do, and how they can expect to experience it. Now that you have hooked them with a strong experience statement, you can tell them more about what they will be doing—while still focused on their values and desired outcomes.

In this section, draw on the information you pulled together in describing the components of your experience (Step 2). The length of this section is based on the duration and complexity of the experience you are offering; customers expect shorter descriptions for experiences that are less complex or take little time to do, and longer descriptions for experiences that are more complex or occur over a longer period of time.

When writing this section remember to write with the customers' values in mind so that you engage their interest. Providing a list of things to do is not sufficient.

Logistics

Think of this section as providing the features that underpin the benefits addressed in the *Experience statement* and *Activities and context* sections. This includes the infrastructure that supports the experience, the size of the group, the location of start/end points, etc.

For example, if your experience relates to cycling, this section would include the type of bicycle (road vs. mountain bike, and if well known, possibly the brand name), the distances travelled and the route taken (you could show a map), the type of accommodations (if multi-day), and any other pertinent info people require when considering a purchase, including the price.

Example:

Experience the past, enjoy the present (Great Spirit Circle Trail)

EQ type: Cultural Explorer

Experience statement:

Embark on a profound, authentic aboriginal cultural experience through Great Spirit Circle Trail. Gain an innate understanding of the culture and traditions of the Anishinaabe people of Manitoulin Island, northern Ontario, from local aboriginal people proud to share the history of the island's original inhabitants—the Ojibwe, Odawa and Pottawatomi peoples.

Activities and context:

Retrace historic canoe routes along one of the largest freshwater islands in the world, searching for artifacts from the fur trade area and exploring the Iroquois battle site of Skulls Point. Relish the hands-on tradition of making your own authentic drum while learning about its importance in native history and significance in a Pow Wow. Discover how to make bannock over an open fire, and pick native plants to make fresh local tea. Experience warm hospitality that reaches back centuries, from well-trained guides who openly share their captivating stories and local legends. Spend the night in a tipi site, sleeping under plush duvets and buffalo hides, absorbing the transformative gifts of this magic culture, one where people live in perfect harmony with the serenity of nature and honours their ancestors' traditions.

Logistics:

Open May to October. A range of experiences are available for a variety of skill levels, from one-hour educational interpretive tours to overnight wilderness eco-adventures. Guides speak English, French and German and cater to a variety of dietary needs.

Call to action (CTA)

The call to action is a critical component to selling your experience. While the previous elements address describing your experience—engaging the target customer's interest—the CTA is focused on having the customer take action.

A clear CTA should stand out from the copy and not be buried within it. While it may incorporate a promotional message, it doesn't need to. In its simplest form it is a clear statement about how to obtain more information and/or make a purchase.

This Tourism Whistler email presents three examples of clear calls to action:

- Book now button
- 1-800 number
- Email us button



Email from Tourism Whistler, 12 February 2013

Step 4: Tweak the description based on its context

Think about where your potential customer will see your description. Will it be on your website? On a destination marketing organization (DMO) website? In a brochure available at a visitor information centre? Or perhaps in a direct mail campaign?

How you answer these questions will guide the adjustments or "tweaks" you might make to your description in order to address the opportunities or limitations associated with the media or channel you intend to use.

For example, you likely have abundant space in media you own (your website), whereas space is likely limited when you are presenting your description in media you do not own, such as a DMO or partner website. Given this, you want to make sure you focus on the key elements in your description:

- The experience statement—which grabs the attention of target customers
- The call to action—which moves customers to take the next step.

If space is extremely limited, these two elements may be all you are able to present. If there is more space, then you can add details in the order of importance to your target customers. First impressions count, and this may be the only opportunity you have to make yourself stand out, especially on DMO or partner websites.

Depending on the EQ type you are targeting and the media used to present your experience, you may choose to use different calls-to-action. For example, while all EQ types research and plan travel online, some types (i.e., Free Spirits) are more comfortable with electronic media than others. Given this, a web address that is visible and easy to recall/enter is important when

presented offline, such as in outdoor advertising or a print brochure. In these instances you want to direct customers to your home page and make sure it is easy for them to find what they are looking for.

In contrast, if you are conducting an email campaign you can use a "Book now" button that takes the customer directly to the booking page, or a "More Information" button that takes them to a page that provides a fuller description of the experience.

Phone numbers are also important, even when your description is being presented online. While most people research travel online, many prefer to book by phone. Even among those EQ types that prefer to book online, there will be some people who prefer to talk with the operator before booking. An alternative to this is also the "Email us" option as shown on the Tourism Whistler example.

Look again at Worksheet 3 on page 9 and your base description. In the last column note the changes you would make given where you intend to place the description.

Other writing tips

- Work with your staff—brainstorm words guests would use to describe the experience you are offering.
- Check what past guests have written about you and the words they use to describe their experiences.
- Evoke feelings. Tell people what they will hear, smell, taste, touch, see and especially how they might feel.
- Keep your writing simple, active and focused.
- Be specific. Why should people purchase this experience? Why is it unique?
- Use a tone that is personal, friendly, witty and authentic.
- Have a traveller-to-traveller conversation with your reader.
- Use language that is customer-focused rather than geared to business—do not use jargon.
- Inspire your readers and help them imagine the experience you are offering.
- Ask staff who are the same explorer type as your target type to help write the description.

Photo credits:

Page 6: Canadian summer
(Canadian Tourism Commission)

Page 6: Banff Upper Hot Springs, Banff National Park, AB
(Banff Lake Louise Tourism)

What's next?

As the saying goes, a picture (or video) is worth a thousand words. The question is—are your images saying what you want them to?

Review the next module: [Assess and Choose Imagery Using EQ](#) to determine how to select imagery that will attract your target explorer type.



To which explorer type(s) do you think the photo above would appeal? Find out in [Assess and Choose Imagery Using EQ](#)! If you have already applied EQ in choosing your images, check out the next EQ Toolkit module.



Keep exploring!

In addition to the EQ Toolkit, the Canadian Tourism Commission offers you a wealth of other helpful resources, including CTC's [Canadian Signature Experiences](#) case studies where you will find more examples of Visitor Experience statements.

Keep exploring our [online resources](#).

EQ® Toolkit

Determine Your Best Customers Using EQ

Fine-tune Your Product Using EQ

Package Experiences Using EQ

Describe Your Experience Using EQ

Assess and Choose Imagery Using EQ

Promote and Sell Using EQ

Appendix A: Worksheets 1 and 2

Answer each of the questions on these worksheets in order to better understand the values of your best or target customers and how their values are addressed through the experience you offer. Use the CTC's [EQ Profiles](#) to find the information you need.

Worksheet 1:—Understand your customer

Identify the key social and travel values and the words and phrases that are likely to appeal to your target customers based on these values.

If focused on multiple EQ types, remember to address common values and avoid values that do not resonate with one of the types.

Worksheet 2:—Define your experience

Review the experience you offer from the perspective of your best/target customers and identify what makes it so special to them.

Understand your target customer (Step 1) – Worksheet

EQ Type(s)	
List your EQ type's social values	
Words that reflect these social values	
List your EQ type's travel values	
Words that reflect these travel values	

Define your experience (Step 2) – Worksheet

Experience Name	
Why does your experience appeal to your target customer?	
What are the components of your experience? (prioritize the listing of experience elements— which are core vs. secondary)	
What is your unique selling proposition? (what differentiates your experience)	

Appendix A: Worksheet 3

Answer each of the questions on the worksheet in order to develop the base description of your experience and structure its presentation.

Once you have this base description completed, review it and think of what adjustments (if any) you would make based on the media in which you will present the description.

Write a description of your experience (Steps 3 and 4) – Worksheet		
Element	Description (Step 3)	Adjust for placement (Step 4)
Experience title		
Experience statement Why would they do this?		
Activities and context What will they be doing? For experiences with multiple activities put more focus on those that are core to the experience and/or those that differentiate it.		
Logistics Where will they do it (start/end)? When can they do it? How much does it cost?		
Call to action How do they book/buy it or get more information?		

Appendix B: Additional examples

Fondue with a view hiking adventure (Great Divide Nature Interpretation)

EQ type: Authentic Experiencer

Experience statement:

Calling all honeymooners and choco-holics! Atop a historic fire lookout site, you will breathe in the exquisite aroma of melting chocolate while gazing out at some of the most expansive views in the UNESCO World Heritage Site of Banff National Park. Reach out and dip a cherry into our top-secret fondue recipe made with award-winning Belgian chocolate from Calgary-based Bernard Callebaut. Bring it to your lips and smile.

Activities and context:

Scenery and sweet tastes will not be your only rewards on this full-day private hike. As always, our trips are packed with stories about wildlife, flowers and natural processes like the forest fires that led to the creation of the fire lookout system. Hear tales of early Swiss mountain guides who came here over a century ago, and whose culture still imbues the area. Watch for the backpack of goodies that brings the trail to life as you wind your way up the mountain.

Logistics:

Available to small groups of two to 12 people. Participants will need a vehicle to get to the trailhead. This customized experience requires that you dress for the weather, have sturdy footwear, are prepared to hike at least six kilometers (four miles) and, of course, love Belgian chocolate! Trips are tailored to both seasoned and novice hikers with a range of moderate to difficult routes. Offered between June and September, advanced booking is required.

Don't forget to include a call to action.

View to a thrill (Niagara Helicopters)

EQ type: Free Spirit

Experience statement:

For thrill seekers, and food and wine lovers! It's the ultimate adrenaline ride: experience a hell-tour of spectacular Niagara Falls, with breathtaking views unavailable from the ground, then be personally choppered onto the grounds of Niagara wineries where you'll discover local vintages and incredible food/wine pairings.

Activities and context:

Be one of the privileged few to experience a bird's-eye view of Niagara Falls, and the utter thrill of flying in a helicopter with heart-stopping views of the surrounding countryside. Hear the roar of the Falls and feel your heart pound as you witness one of the original Seven Wonders of the World. Soar over the surrounding countryside, passing above acres of grapevines, then landing among the lush vineyards of award-winning wineries. Awaken your inner wine and food lover by participating in a wine tasting and learning how wine is made. Sample the work of a fifth-generation winegrower, discovering local varietals such as Baco Noir or Canada's famous late-harvest ice-wine. Indulge in your love of adventure, food and wine on this ultimate Niagara Falls trip. Experience perfect food/wine pairings prepared by renowned chefs or a wine tasting tailored just for you while listening to live jazz on the patio. Visit a rare vintage library in a winery whose family spans three generations.

Logistics:

Niagara Falls is the number one tourist destination in Canada. The Niagara Wine Route is recognized globally as an outstanding wine-producing area, with more than 70 wineries. Taped commentary is available in 12 languages. Wheelchair accessible. Flights depart daily, weather permitting.

Don't forget to include a call to action.

Eco-Culture Experience™ (Cape Race Cultural Adventures)

EQ type: Cultural Explorer

Experience statement:

For the curious, culturally inclined traveller! Immerse yourself in Newfoundland culture through a weeklong self-guided tour, providing you with exclusive access to three architecturally unique homes. Set your own pace for exploring the beautiful Newfoundland coast, creating spontaneous, authentic experiences with Newfoundland's people and places.

Activities and context:

You're provided with a car and sample itineraries, but make the trip your own as you explore Newfoundland's beautiful Avalon and Bonavista peninsulas. With your customized guidebook in hand, created based on your travelling preferences, you'll discover biking and kayaking routes, and coastal hiking trails with views of icebergs and puffins. Find out where to buy the best fish. Drop in to a local pub to discover a fiddling jam in the works, or accept an invitation to a neighbour's "kitchen party." View tens of thousands of seabirds congregating along picturesque high cliffs. Throughout your trip, you'll stay in three historic coastal Newfoundland houses, each one reflecting Newfoundland history. Besides having unique experiences of Newfoundland's wildlife and seascapes, you'll make deep connections with local people that will create lasting memories.

Logistics:

Self-guided, self-catering tours are available April through October, and come with an unlimited-km full-size vehicle. Trip includes a printed guidebook customized to suit your travel style. Trips are initiated at St. John's and concluded at Bonavista. Travellers should be equipped with all-weather clothing. Mandatory personal insurance is not included.

Don't forget to include a call to action.

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Assess and Choose Imagery Using EQ

If a picture is worth a thousand words, do you know what your imagery is saying? Understanding what images will resonate with your target customers—and why—is important in capturing their attention and to portraying your product or experience in a way that will move them along the path to purchase.

In this module, you will learn:

- How to assess imagery using an EQ lens.
- An approach to categorize and organize your images to reflect the elements of the tourism product or experience you offer in a way that is compelling for your customers.

This module can be fun to do with your staff. If you have staff members who are the same EQ as the type (s) you are targeting, that's even better, as they can likely provide some good insights.

We recommend that you work through the exercises for each product or experience you sell. By taking this approach you may identify instances where the same picture may address different elements depending on the experience with which it is positioned.

Before you begin...

Know which EQ types you are targeting and reacquaint yourself with their values, behaviours and other attributes you believe are important. If you have not yet determined your best customers/target EQ types, we recommend doing so using the module [Determine Your Best Customers Using EQ](#).

If you are targeting more than one EQ type make sure you understand their commonalities. Also, check the defining values for each type—you want to make sure you are not highlighting a value that is strong for one type and negative for another.

Since images provide a visual description of your product or experience, it is helpful, but not necessary, if you have developed a compelling written description (as outlined in [Describe Your Experience Using EQ](#)).

Keep the [EQ Profiles](#)* for your target types handy.



*All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.

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Step 1: Assess your current imagery through an EQ lens

In this step you will:

- Identify the values addressed in your imagery.
- Rate the appeal of your imagery relative to your target EQ types.
- Identify what you can do to strengthen your imagery.

These steps are described in more detail on the next page.

Now that you have reacquainted yourself with the values associated with your EQ types, let's get started.

A blank copy of this worksheet is provided at the end of the module for you to use in completing the exercise with your own experience.

Identify the values addressed in your imagery

Record the images you currently use (or have and could use) to present the product/experience in your marketing materials. You can insert the image (as we did in the example) or describe it. If describing it, make sure you and your team are clear on the image being referenced.

Examine the picture—what *values* are embodied in the image? Record these in the appropriate column. Consider the feelings/emotions being expressed by the people in the picture. What are they doing? What are they looking at? All these factors are important in understanding how strongly the picture will appeal to your target explorer types.

To get you started, review examples of images and the values they address in Appendix A.




Rate your imagery's appeal

Using a scale of 1 to 5, where 1 indicates the image is weak (holds little appeal) and 5 indicates the image is strong (holds great appeal) to the target type, *rate* each of your images.

Ideas to strengthen the appeal

As you are reviewing the images and discussing their appeal you might be inspired by *ideas* regarding how the image could be strengthened or other images that could be included. Record these ideas and comments in the associated column of the template.

Imagery assessment using EQ – Example

Experience	CN Tower EdgeWalk		
Best/target EQ type(s)	Free Spirits		
Defining values: (per EQ Profiles)	Penchant for risk, need for status recognition, importance of brands, samplers, exhibitionism and shared experience.		
Other behaviours/attributes of note: (per EQ Profiles)	Enjoy visiting amusement/theme parks and seeing the main sights. Enjoy active participation in an activity.		
Visual	Identify values addressed	Rate Appeal 5=Strong 1=Weak	Comments/ideas to strengthen the appeal
	Penchant for risk Exhibitionism Shared experience Need for status recognition	5	Make sure picture is presented large enough to see the emotion presented on peoples' faces—a great way to show the emotional high of the experience. Include a video of the experience on the website.
	As above	4	Good to show context and the activity itself. The picture is not as strong as the one above in terms of expressing the emotions/feelings associated with the experience. Not as strong on the values "shared experience" and "exhibitionism." A picture showing people engaged in the experience and others looking and pointing at them would be stronger on exhibitionism.
	Importance of brand Samplers Risk	4	Perspective makes it look really high. Works well with the above pictures in terms of showing height, though would not be as good if on its own as it could be perceived as a trick of photographic perspective.
Other			Considering Free Spirits enjoy fine dining, include a supporting visual of a dining experience for after the EdgeWalk.

Step 2: Categorize your imagery

What type of images do you use to portray your experience? Do you have that picture that embodies the *experience* to its fullest—such as the image of the people doing the EdgeWalk leaning out and away from the CN Tower? Or are most of your pictures void of people—presenting the infrastructure (i.e., rooms) and/or context (i.e., landscapes)? Such pictures are *supportive* in that they present features of the experience rather than presenting the experience itself.

Using the definitions that follow, review your own imagery and indicate its type in the final column of the worksheet found on page 9.

Experiential imagery

Experiential images are those that present people engaged in the experience. There are two types of experiential pictures:

1. Full-on experience

These images can stand alone and tell the story. They depict emotion and are aligned with your brand and unique selling proposition. If you were only able to present one picture in your materials, this is the picture you would want to use as it is the one that is most likely to attract the attention of your target customers.

The picture below on the left, of a couple sitting on the dock by the lake, is an example of a picture that tells a story and evokes one's senses. Can't you feel the stillness and the warmth of the air as you imagine talking about your day paddling on the lake, sipping a glass of wine and anticipating the call of the loon?

This picture pulls you into a Canadian summer lakeside experience.

2. Activity-oriented experience

These images are experiential in subject and show people engaged in an activity but do not meet all the criteria required to be categorized as a full-on experience (potentially not as engaging or emotionally captivating).

Alternatively, they may be highly engaging, but relate to a secondary activity within the overall experience. For example, pictures of people preparing for the EdgeWalk experience at the CN Tower or dining at a CN Tower restaurant (such as below right), would be examples of pictures associated with secondary activities when positioned with a picture of the EdgeWalk experience.



Experiential image—full-on experience: Summer lakeside evening



Experiential image—activity-oriented experience: Dining at the CN Tower

Supporting imagery

Supporting imagery provides context to the experience. Given their supporting role, these images will generally be smaller in scale relative to the experiential images you use.

There are four types of supporting imagery:

1. Infrastructure

Pictures of buildings or historical architecture that support the experience are examples of infrastructure-oriented images, as are images of empty rooms. Such pictures *may* be helpful in highlighting a feature (i.e., the view in the picture of an empty dining room below) but should not be relied upon to present an experience.



Supporting image—Architecture (infrastructure)



Supporting image—Dining room (infrastructure)

2. Landscape/Wildlife

While images of landscapes and wildlife can elicit emotion, they are generally used to provide a sense of place and what one will see rather than do. As such, these kinds of pictures play a supporting role.



Supporting image—Bear eating (wildlife)

3. Product

Pictures of products can be helpful—the food at a restaurant, the bikes being used in a bike tour, the gear being used on the EdgeWalk—as they can play a role in supporting the brand even though they are not experientially focused.



Supporting image—Meal (product)

4. Service providers/personalities

Pictures of local personalities and service providers are useful to support the experience and provide context. In contrast, images of personalities *interacting* with the visitors are examples of experiential imagery.



Supporting image—Carver (local personality)



Supporting image—Fisherman (local personality)

Step 3: Make adjustments

What is the mix of images you currently use in your marketing materials? What do you use more of—experiential or supporting images?

Review your web pages and other marketing materials. Assess how much space is devoted to experiential imagery in comparison to supporting imagery. While there is no hard rule regarding these proportions, a good rule of thumb is to have a higher share of your space devoted to experiential pictures—especially in situations where first impressions count.

Your *full-on experience image* should be the largest image presented. This is the picture that best represents your brand and the experience; this is the picture expected to attract and engage your customers' interest. Make sure it is placed where it will be seen on the page. If you are putting together a rack card or brochure that will be displayed in a place with other tourism experiences, make sure your full-on experience image is what is visible to consumers scanning the rack. Or, if it is on a web page, make sure it is placed where it can be seen on most people's screens (top of the page).

As previously mentioned, images are also used to support and extend your written descriptions. Review your descriptions and identify the areas where images can play a strong role in communicating your experience and providing context. Then use the steps suggested in this module to identify the pictures that will do the best job at selling your experience to your target customers.

Examples of experiential and supporting images



What type of images are these?

Almost all are experiential in subject matter. Image 1 presents the *full-on experience* whereas images 3—7 are *activity-oriented*. Image 3 verges on being infrastructure, but the inclusion of people hanging off the edge makes it somewhat more activity-focused—whereas image 2 is truly *infrastructure*.

More tips on choosing images

- Evoke feelings. Show people engaged in the moment, participating in the experience—what they see, smell, taste, touch and especially how they feel.
- Take the picture from a first-person perspective, as if you are there having the experience, rather than from a distance.
- Make sure the people and the action look authentic, natural and un-posed. Note that you will likely have to 'stage' the shot as snapshots are rarely of sufficient quality (content, lighting and resolution).
- Ensure the lighting is warm and that the people in the shots are friendly.
- Make sure there is space for a headline (if needed); you do not want the copy to cut off a key element of the image.
- Look at (and collect, with permission) the photos your guests are taking. These are the photos they show to friends to describe your experience—maybe there are some good ones you can use.

Keep exploring!

Review the EQ video about Heritage Park on the CTC website to see how this organization applied EQ to the development of their photographic assets.

In addition to the EQ Toolkit, the Canadian Tourism Commission offers you a wealth of other helpful learning resources. Keep exploring [the CTC's EQ learning opportunities!](#)



Photo Credits

Page 2 (all), Page 3 (dining)
Page 4 (dining room & food)
Page 5 (all): CN Tower, Toronto, ON
Page 7: Lighthouse, PEI
(Tourism PEI/John Sylvester)
Page 8: Group on a boat & Acadian festival
(Asymmetric/Matthew Vibert)
All other photos: Canadian Tourism Commission

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Appendix A: Examples of images and the EQ types to which they appeal, based on values

	<p>Free Spirits</p> <ul style="list-style-type: none"> Addresses tendency for sampling and a desire to see the main sights. Focus on self – "Look at me, I was here" (exhibitionism and status recognition). With friends (shared experiences). 		<p>Free Spirits</p> <ul style="list-style-type: none"> Shopping (joy of consumption and importance of brand—would need to know this is <i>the</i> place for cowboy boots/gear). Would be improved by adding friends to the picture. <p>Cultural Explorers</p> <ul style="list-style-type: none"> Would appreciate engaging with the "local expert."
	<p>Authentic Experiencers & Cultural Explorers</p> <ul style="list-style-type: none"> Looks like they are out exploring on their own, highlighting these types' interest in unstructured travel and a desire to be somewhat active. Also the lack of people suggests it is a place or season when tourists are not around, which would appeal particularly to Authentic Experiencers. Personal History Explorers from the east might recognize the area (they also like beautiful coastlines, though it would be stronger for this type if there were more people in the picture to address the value of shared experiences). 		<p>Cultural History Buffs and other Learners</p> <ul style="list-style-type: none"> This type has an interest in history, older buildings and architecture, which this picture shows well. Cultural History Buffs like to share their knowledge and the person in the picture looks like he could be doing this. The experience looks to be unstructured, which is something that would appeal to Authentic Experiencers and Cultural Explorers (Learners).
	<p>Free Spirits & Rejuvenators</p> <ul style="list-style-type: none"> Indulgence and spa (hedonistic rejuvenation). Appeals to the luxury side of Free Spirits. Rejuvenators would like that this looks somewhat understated; while they like spas, they are less likely to spend as freely on luxuries. 		<p>Gentle Explorers & No-Hassle Travellers</p> <ul style="list-style-type: none"> Presents a fairly passive activity (sightseeing), which is easy to do and offers a break from the every day. Could be improved for these two types if there were more people in the picture (it would then also appeal to Group Tourists). Could also be improved with an iconic view.
	<p>Rejuvenators, Authentic Experiencers & Cultural Explorers</p> <ul style="list-style-type: none"> All are interested in unstructured travel and natural environments. Evokes feelings of comfort (Rejuvenators) without being over-the-top (Authentic Experiencers). 		<p>Cultural Explorers & Rejuvenators</p> <ul style="list-style-type: none"> Depiction of nature—along with the small group, plus guide for support and easy terrain—would appeal to these two types. Could be a supporting picture for Free Spirits (they would prefer a more exciting picture). Authentic Experiencers would not like what looks to be a highly structured environment.

Appendix A (cont'd): Examples of images and the EQ types to which they appeal, based on values

	<p>Cultural Explorers & Authentic Experiencers</p> <ul style="list-style-type: none"> Intimate environment; local cuisine in the company of locals. Depiction of nature—draws on ecological concern as well as nature travel. Shared experiences, but not with a large group—if this was geared to Free Spirits it would look more like a party. 		<p>Many types</p> <ul style="list-style-type: none"> Cultural Explorers & Authentic Experiencers would like the small local festival feel that comes across. Free Spirits would think it looks fun; it would be an easy experience if there were more people in the picture.
	<p>No-Hassle Travellers & Gentle Explorers</p> <ul style="list-style-type: none"> Presents what looks like a group and structured environment, which these types like. Social aspect would appeal to Free Spirits but would be better if there were more younger people in the picture. Authentic Experiencers & Cultural Explorers would prefer a more intimate environment that includes a "local". 		<p>Rejuvenators</p> <ul style="list-style-type: none"> Joy of consumption along with a carefree attitude in a nightclub/fine restaurant would hold strong appeal to Free Spirits. Carefree indulgence (hedonistic rejuvenation) as shown in this picture would appeal to Free Spirits as well as Rejuvenators, No-Hassle Travellers and Personal History Explorers. Shared experiences aspect would appeal to Cultural Explorers, though they might be a little less exuberant.
	<p>Authentic Experiencers, Cultural Explorers & Personal History Explorers</p> <ul style="list-style-type: none"> Historical travel and culture sampling appeals to all three types, with an even stronger draw for the Cultural Explorers—who enjoy festivals (crowds) more than the Authentic Experiencers. Also holds appeal to the Personal History Explorer with Acadian roots. 		<p>All types</p> <ul style="list-style-type: none"> Wildlife viewing appeals to all types; however, given the lack of people and the more natural and unstructured environment, this picture would appeal more to Authentic Experiencers, Rejuvenators, and Personal History Explorers. No-Hassle Travellers would likely be inside a vehicle, and Rejuvenators would want to see more.
	<p>Authentic Experiencers, Cultural Explorers & Cultural History Buffs</p> <ul style="list-style-type: none"> Historical travel and culture would appeal to all three types, as would the one-to-one nature of the experience—especially for Authentic Experiencers and Cultural History Buffs. 		<p>Rejuvenators</p> <ul style="list-style-type: none"> Like the outdoors, nature and unstructured travel. Also, as comfort seekers they would like this type of camping—looks much easier and more comfortable than a traditional tent.

Appendix B: Worksheet

Use this worksheet and answer each of the questions in order to better understand the values of your best or target customers, and how their values are addressed through the images you are using.

Identify the values expressed in the image.

Rate the image's appeal relative to the values and behaviours of the target type(s).

Record comments or ideas that could help strengthen the image's appeal.

Indicate the type of image the picture represents.

Imagery assessment using an EQ lens – Worksheet				
Experience Name:				
Best/target EQ type(s):				
Defining Values: <i>(per EQ Profiles)</i>				
Other behaviours/ attributes of note: <i>(per EQ Profiles)</i>				
Image <i>(describe or paste a copy of your actual image)</i>	Identify values addressed	Rate appeal 5=Strong 1=Weak	Comments/ideas to strengthen the appeal	Type of image

Determine Your Best Customers Using EQ

Fine-tune Your Product Using EQ

Package Experiences Using EQ

Describe Your Experience Using EQ

Assess and Choose Imagery Using EQ

Promote and Sell Using EQ

Promote and Sell Using EQ

Tourism organizations play an important role in the promoting and selling process by showcasing their product offers and helping consumers plan, purchase and talk about their trips. In this module, you will learn how to use EQ to:

1. Influence your target EQ types to seriously consider your product and the experience it offers;
2. Assist your target EQ types to visualize and plan their trip,
3. Facilitate the process of closing the sale
4. Inspire travellers to promote your experience by talking about their experience with friends and family.



At this point, you know who your best EQ customers are and have fine-tuned your product to appeal to their values and preferences. You have also crafted EQ-receptive messages and gathered images that will capture your target EQ types' attention. Now, how can you use EQ to get the word out and sell your product or experience?

To better understand the decision journey of the traveller and the opportunity to influence it, the CTC has adopted a Tourism Experience Path to Purchase model. In this EQ Toolkit module we will use the Path to Purchase to illustrate how you can effectively move your customers along the path as you promote and sell your product or experience.

Tourism Experience Path to Purchase



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Before you begin...

Take a moment to review the Path to Purchase and its four main stages, within which travellers take a number of steps:

1. **Consideration:** Consumers step from becoming *aware* of a tourism destination or experience, to putting it on their *dream list*, and seriously including it on their *consideration list* for an upcoming trip. Destination marketing organizations (DMOs) are very active in this stage, promoting their city or region as a tourism destination to their target markets.
2. **Evaluation:** Consumers start *creating their vacation* and *planning a detailed itinerary*. Tourism organizations play a prominent role at this stage, showcasing their product offers as truly memorable experiences.
3. **Purchase:** Consumers *finalize their travel arrangements* and *book the trip*. Tourism organizations also play an important role at this stage, providing the means by which consumers can purchase their trip elements.
4. **Advocacy:** Consumers are actually having the experience of *exploring Canada* and *advocating* to friends and family about it. Both tourism organizations and DMOs can be very effective at this stage in encouraging advocates.

*All referenced materials may be accessed at the Canadian Tourism Commission's corporate website at www.destinationcanada.com/tools.

Now that we've briefly reviewed the stages and steps on the Tourism Experience Path to Purchase—and the important role that tourism enterprises play in moving consumers along the path—we can now look at some strategies to help you use this knowledge by focusing on the following stages:

Evaluation Stage: Helping consumers visualize themselves in the experience and subsequently plan their trips

Purchasing Stage: Providing information and processes for closing the sale

Advocacy Stage: Inspiring consumers to talk about your product or experience to family and friends.

Make sure that you have identified your target EQ types (see [Determine Your Best Customers Using EQ*](#)) and keep your [EQ Profiles](#) handy for quick reference!



Work with your DMO in the consideration stage

This EQ Toolkit module focuses on tourism organizations' efforts to promote and sell their products in the *evaluation*, *purchase* and *advocacy* stages of the Path to Purchase. This does not mean, however, that you can't also play an effective role in the *consideration* stage. Working with your local, regional and provincial destination marketing organizations (DMOs) will increase the likelihood that the spotlight cast by their marketing efforts lands on your product. Here are some ideas:

1. *Understand your DMO's marketing strategy and consider aligning your marketing efforts.*

Your local, regional or provincial DMO is an important ally in your marketing strategy. If possible, position your product offer to fit well within its brand and unique selling points. Look for points of alignment between both your target market. Get involved in training programs. Have good-quality images and video footage on hand for use in relevant DMO marketing campaigns.

2. *Use EQ to assess your involvement in DMO partner programs and familiarization (FAM) trips for journalists.*

By studying your target EQ types' values and travel preferences, you can determine whether to invest time and money in specific DMO partnership opportunities. For example, if the opportunity is to be part of a shopping package and your target EQ type is the Free Spirit, being included in the package might be a good fit for your organization—particularly if it adds elements that Free Spirits love that you don't provide, such as sightseeing, luxury accommodations and/or music events. DMOs may also offer opportunities to get involved in FAM trips for visiting journalists. Be sure to research the journalist to determine whether he/she contributes to publications or writes in a style that is a good match with your EQ target types' values.

Step 1: Help consumers visualize themselves in the experience

At this point on the path to purchase—the evaluation stage—consumers are trying to imagine what their vacation would look like and what they will actually be doing during their trip. Amid all of the tourism product offers available in your region, how can you ensure that yours will be the one they choose? By using EQ, you can position your product offer to draw your target EQ types' attention and help them visualize themselves having the experience. Here are some tips to keep in mind:

Ensure that your website ignites your customers' imaginations and describes the experience well.

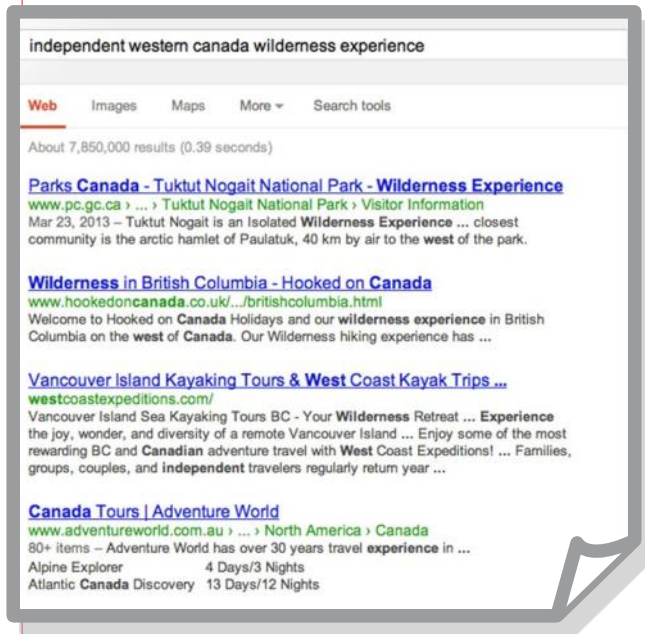
A good website is critical, as travel consumers use the Internet extensively for travel research and as a source of inspiration. This is where your experience should shine. Knowing your target EQ types' values and travel preferences will help you create engaging messages and illustrate the experience through photography and video.

Telling stories on your website is also a great way to ignite your customers' imaginations and inspire them to dream about your experience. Create a video featuring some of your past guests telling stories about their visits. Paint a picture to draw readers in, and use action words that appeal to the senses, such as "feel", "hear" and "touch" that give them a sense of being there.

The *EQ Toolkit* modules [Describe Your Experience Using EQ*](#) and [Assess and Choose Imagery Using EQ*](#) are excellent resources for how to use words and imagery to build excitement around your offer.

Use EQ for search engine optimization. Think about the values of your target EQ types and the words/terms they would use to search online for an experience such as yours. Use these terms to tag appropriate words on your website.

The example below presents travel experiences geared to an Authentic Experiencer looking for an "independent western Canada wilderness experience." As you can see, when these key words are entered into the search box, the experiences presented would appeal to Authentic Experiencers.



Use social media to engage your target EQ types.

Social media is arguably one of the most important and accessible channels for tourism organizations to build product awareness and engage with customers. Like EQ itself, social media is based on shared interests and values. Draw attention to your product offer with images, videos and messages that are relevant to your target EQ types.

1. *Create content (including video, photography and copy) that matches your EQ types' interests.*

After reviewing your target EQ types in [EQ Profiles](#), list the aspects of your brand that are a natural fit with those types' interests. Then, for each listed item, determine how you can tell its story, creating, for example, a video, blog entry, photo essay, etc.. Be sure to keep the tone friendly.

2. *Distribute content using media sharing sites to directly reach your target EQ types.*

Use your EQ knowledge to generate keywords relating to each story or piece of content that you have created. Then, use them as tags when distributing content on media sharing sites (such as YouTube, Pinterest and Instagram), to make it easy for your target EQ types to find your content.

3. *Participate in social networks, blogs and forums to raise your profile and build relationships with your target EQ types*

Join social networks such as Facebook and Tumblr—along with forums and groups—that fit with your product and target EQ types. Focus on engagement—telling stories and providing useful, relevant information related to your EQ types' values. Use services like Twitter and Tumblr to post "in the moment" content that will give your EQ types a sense of actually being there.

Ensure your promotions line up with your customers' values

The major benefit of EQ is that it helps you understand the values driving consumer behaviour. Page two of each of the country-specific sections in the [EQ Profiles](#) provides tips on the tone of voice, type of media, etc. to use when building promotional strategies that are specific to your target EQ types.

Use the worksheet in Appendix A to help you compose some promotional messages that will apply to each of your target EQ types.

<p>Product:</p> <ul style="list-style-type: none"> • Interactive and immersive experiences • Beautiful scenery, active adventure, shopping, dining and outdoor festivals/events • Allows free exploration • Environmentally, socially responsible 	<p>Price:</p> <ul style="list-style-type: none"> • Will pay for unique experiences, local, sustainable, ethical products • Value for money • Respond well to discounts and feeling like they are getting a 'deal' • Transparency of offering
<p>Canadian Cultural Explorers</p>	
<p>Promotion:</p> <ul style="list-style-type: none"> • Get people talking (word of mouth and word of mouse) • Varied and extensive media mix, heavy emphasis on websites • Include other traveller reviews • Social connection with locals • Stylish, creative • Traditional Advertising (newspaper, magazine, billboard) 	<p>Close the Sale!</p> <ul style="list-style-type: none"> • Partner with airlines, hotels, attraction and services in your area • Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed! • Include a clear 'call to action' on websites and social channels • Make it clear how to book online or connect via phone

Step 2: Help customers plan their trips

As your potential customers become more aware of and excited about your offer, you have an opportunity to move them farther down the path to purchase to trip planning.

Website. Your website continues to be a vital force at this point of the evaluation stage on the path to purchase. It must provide complete and current information for consumers to understand all of the options—particularly if they are juggling the competing interests of travel companions. This should include a detailed itinerary of your experience, plus information on where, when, how long and how much it costs.

Each country-specific [EQ Profile](#) includes information on last trip travel behaviours for each EQ type. This can be useful when creating trip planning tools on your website. UK Cultural Explorers, for example, averaged 18.1 days on their last long-haul trip and 50% had a party composition of just two adults. This information should inform how you compose and describe your detailed itinerary and what you might emphasize or feature that would encourage couples to extend their stay.

Internet. In addition to your website, the rest of the Internet is an important source of information for trip planners. By checking page two of the country-specific [EQ Profiles](#) you will discover that websites of online retailers, travel agencies, tour operators, airlines, hotels, attractions and other destination services are consistently listed in the top three sources for travel planning among most EQ types.

Social Media. Most EQ types rely heavily on discussions with friends, family and colleagues for planning advice. For some, this may happen through person-to-person chats or emails, but for a great number of consumers, the advent of social media and growing variety of mobile devices has greatly expanded their ability to communicate with online "friends" and gain new insights on planning where to go, where to stay, where to eat and what to do.

While not all EQ types are enthusiastic social media users for travel planning, it is extremely important for some types.

For instance, global Free Spirits lead the pack for using new technology and social media sites for online travel planning, followed by Cultural Explorers, while Authentic Experiencers, No Hassle Travellers and Rejuvenators are less likely to do so.

Use of social networking sites for travel planning, by EQ type

Free Spirits	Cultural Explorers	Authentic Experiencers	No-Hassle Travellers	Rejuvenators
↑↑↑	↑	↓	↓	↓

Note: This information is supplementary to the information in the [EQ Profiles](#). The arrows indicate the strength of the value for selected EQ types (up arrows = strong, down arrows = weak and no arrow = average).

Online review sites such as TripAdvisor have become critical to the trip planning process as sources of "unbiased" travel information. It's important to list your enterprise, provide a good description of your product or experience, and have lots of EQ-inspired photos on those sites. Sign up to receive any reviews posted about your organization and respond as necessary with a thank you or a comment; this shows trip planners that you are paying attention, and allows you to address any negative comments that may affect their planning.

Direct Calling. Regardless of the EQ type, it is always possible that consumers may just pick up the phone and call you. How do you handle calls and requests that come in to your operation? What training do you provide to the people who answer the phones and respond to in-person guest requests?

It can be very helpful to bring together your frontline staff to discuss the words and phrases your customers use that provide clues about their EQ type and what they are looking for in planning their visit. You could also consider what questions to ask customers to help provide you with information to better match your offer with their values and the experiences they are seeking.



Step 3: Close the sale

At this point in the process, your target EQ types have a very good understanding of your product offer and what kind of experience they can expect. They have a high level of interest in your product. So what can you do to close the sale?

Use EQ to choose the right sales channels. As with media, different EQ types have different sales channels preferences. While all EQ types use the Internet, some EQ types are more likely than others to purchase online. There can also be differences in the type of website used.

For example, we can see from page two of the [EQ Profiles'](#) Canada section that travel agencies, travel operators and tour guide websites are sales channels for Canadian Free Spirits. We also can surmise that Free Spirits, due to their comfort with technology, are likely to take advantage of their smartphones and book on mobile-friendly websites—one of the newer and fastest-growing ways to purchase travel.



Use EQ to set the right price. Understanding your target EQ types' social values will be key to setting the right price and sending the right price-oriented messages.

This chart* presents selected price-oriented social values according to three EQ types. Take a moment to look up the definitions for each of these values in the social values glossary (appended to the [EQ Profiles](#)). The definitions are also included in Appendix B of this module for your easy reference.

Price-oriented social value	FS	CE	AE
Buying on impulse	↓↓		
Discount consumerism	↓	↑	
Discriminating consumerism	↑	↑	
Importance of brand	↑↑↑	↓	↓↓↓
Ostentatious consumption	↑↑↑	↓↓	↓↓
Saving on principle	↓		
Upscale consumerism	↑		↑

FS=Free Spirit, CE=Cultural Explorer, AE=Authentic Experiencer

Based on the chart and your growing knowledge of EQ, which EQ types do you think the following price-oriented messages would most appeal to? (See the answers in Appendix B of this module.)

"Book now and save"

"Book an extra night and get VIP privileges"

"Best price guarantee—we will match any price"

"Like us on Facebook and get a shopping voucher"

The information in this chart is supplementary to the information in the [EQ Profiles](#). The arrows indicate the strength of the value for selected EQ types (up arrows = strong, down arrows = weak and no arrow = average).

Include a clear call to action on your website or channel. A call to action on your website, distribution or social media channel should clearly tell readers what you want them to do. This call to action should include active verbs such as "book," "call," "buy" or "register" to encourage readers to act. You might also include a sense of urgency and a "need to act now" according to your EQ types' values.

Free Spirits, for example, aspire to luxury and status—responding to messages such as "book four nights and get an upgrade." Cultural Explorers value discounts so opportunities for booking early to get a discount will resonate well with them. Authentic Experiencers may respond to the opportunity for a more intimate, authentic experience by booking at less busy times of the year—or by offers that take them behind the scenes or off the beaten path.

Make it as easy as possible to book and purchase the product. Once the consumer determines that it's time to book and purchase your product, it's vital that this process is as easy and straightforward as possible. If the booking process is difficult or malfunctions, all of your careful work in moving your target EQ types down the path to purchase to this point—the actual purchase—will be for nothing. So make sure that the booking wheels are always well greased!

Be sure to include clear instructions about how to purchase your product—whether it's through an online retailer, your website or by phone—and enlist some volunteers to frequently test your booking and purchasing processes to ensure they are working well.

Step 4: Inspire your customers to talk about your experience

Customer-generated advocacy is the fourth stage on the path to purchase and closes the path-to-purchase loop—accelerating new customers' journeys down the path to purchasing your product or experience after hearing about it from their friends and family. As we can see from the [EQ Profiles](#), "discussions with family and friends" and "discussions with other travellers" top the list of sources that many EQ types consult when planning a trip. The popularity of social media has vastly expanded the average user's network of "friends," making customer-generated advocacy one of the most potent factors for business success.

Your customers' advocacy efforts can start while they are enjoying your experience, and continue long after the trip is over. So, what can you do to promote advocacy among your customers?

Deliver a superior customer experience. The most enthusiastic advocacy comes from satisfied customers. The reverse is also true—dissatisfied customers can be very motivated to spread the word about a bad experience. By paying attention to providing outstanding service and a great experience aligned with your target EQ types' values, you are far more likely to see positive reviews.

Make sure that customers have access to WiFi while experiencing your product. Customers will be inspired to post content on social media or send emails while on their trip, particularly if they are carrying a mobile device. By ensuring that they have access to free WiFi, you can help them transmit their "in the moment" excitement to others.

Inspire them with great content that they can share. Think about having a professional photographer on site to take pictures of your clients enjoying your experience, providing them with content that they will be inspired to share.

Make it easy for them to forward or post your promotional material. Ensure that all of your online and email promotions include hotlinks to social media (for example, "tweet this!") to make it easy for your customers to pass them on to others with a personal recommendation.

Want to know more?

Check out [CTC's Training Videos](#) for more insights on promoting and selling with EQ. Topics include:

- Working with travel media
- Selling in international markets
- Making the most of national trade shows including Rendez-vous Canada, GoMedia, etc.



Keep exploring!

The CTC's [Experiences Toolkit](#) provides a step-by-step guide to developing and staging great experiences.



In addition to the EQ Toolkit, the CTC offers you a wealth of [other helpful learning resources](#), including case studies and a training video library.

Photo credits:

Page 1: Saskatchewan (Tourism Saskatchewan / Douglas E. Walker)

Page 2: Tyax Wilderness Resort, BC (Canadian Tourism Commission)

Page 4: ByWard Market, ON (CTC) and,
St. John's, NL (CTC)

EQ® Toolkit

Determine Your Best Customers Using EQ

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Assess and Choose Imagery Using EQ

Promote and Sell Using EQ

Appendix A: Worksheet

Ensure your promotions line up with your customers' values

Use this worksheet, to link the values of your target customers to promotional messages that will resonate with them. Print and fill out separate worksheets for each of your target EQ types.

An example is included for your reference on page 8.

1. Indicate the EQ type you are addressing.
2. Consulting the [EQ Profiles](#) for that EQ type, list any values and behaviours that could affect how you promote your product to that type and the effect that value would have on your messaging. Use the social values glossary appended to the [EQ Profiles](#) to help you fully understand social values—don't just go by the titles!
3. Consider the promotional messages you currently use—list and assess them. Will these messages resonate with your target EQ type? What needs to change?
4. Brainstorm ideas on types of promotional messages that would resonate.

Linking values to promotional messaging – Worksheet

EQ type:

Value/behaviour	Possible effect on promotional message
Current messages List and assess in terms of the above. Do they resonate with your target EQ type?	
Possible new messages Brainstorm new promotional messages.	

Example:

Ensure your promotions line up with your customers' values

This worksheet has been filled out to give you an idea of what a promotional message to Authentic Experiencers would look like after an evaluation of this EQ type's values.

Linking values to promotional messaging – Example

EQ type: Authentic Experiencer (Canada)

Value/behaviour	Possible affect on promotional message
Personal control	They have time to research and create their own trips—not necessarily looking for a packaged trip.
Financial security	They have the financial security to do extras; may not be looking for a discount (though will take it if available).
Spontaneity	High share of retirees, and the "importance of spontaneity" means they are likely and able to take advantage of last-minute offers.
Ecological concern	May translate to a willingness to pay more if there is a direct ecological benefit.
Upscale consumerism	Although AEs are not strong on "joy of consumption" and "ostentatious consumption," they are interested in quality ("upscale consumerism") so may be open to promotions focused on quality.
Interest in learning	Potentially a good focus for a value-added benefit (rather than a discount).
Comfort & luxury	They have little need for luxury when travelling. However, they are interested in quality so may be interested in promotions offering a little extra. Comfort and luxury may also take the form of a boutique inn rather than a large hotel.
Current messages List and assess in terms of the above	
Possible messages Brainstorm possible new promotional messages	<ul style="list-style-type: none"> • Come and experience us when only the locals are in town. • Book for X nights and upgrade to one of our cabins by the lake. • 10% of our profits go to local ecological programs—you choose the program. • Book now and get a free voucher to [a special historical exhibit].

Appendix B: Price messaging—answers and definitions

Below are the answers to the question posed on page five: *Based on the chart and your growing knowledge of EQ, which EQ types do you think the following promotional messages will appeal to?*

“Book now and save”

This message would appeal to EQ types with a higher value for "discount consumerism," such as Cultural Explorers. With their love of travel, this message would have added appeal, allowing them to stretch their travel dollars further. The call for action ("book now") would also appeal to their enthusiasm for spontaneity.

“Book an extra night and get VIP privileges”

With their penchant for luxury, Free Spirits would be attracted to this message—appealing to their high value for "ostentatious consumption" and "upscale consumerism."

“Best price guarantee—we will match any price”

This would appeal to EQ types with a strong value for "discriminating consumerism." As all three EQ types on the chart have an average or above average rating for this value, we can conclude that all types would find this appealing—if the offer also meets their other travel and social values.

“Like us on Facebook and get a shopping voucher”

With their highly social mindset and enjoyment for sharing experiences, Free Spirits are more likely (than other EQ types) to be active on Facebook. A shopping incentive would appeal to their "joy of consumption." If the voucher is to a brand outlet mall, the offer would appeal to their high value for the "importance of brand."

Price-Oriented Social Values Chart and Definitions

The chart from page 5 of this module is repeated here for your reference, along with definitions of the social values listed on the chart.

Price-oriented social value	FS ⁺	CE ⁺	AE ⁺
Buying on impulse	↓↓		
Discount consumerism	↓	↑	
Discriminating consumerism	↑	↑	
Importance of brand	↑↑↑	↓	↓↓↓
Ostentatious consumption	↑↑↑	↓↓	↓↓
Saving on principle	↓		
Upscale consumerism	↑		↑

*FS=Free Spirit, CE=Cultural Explorer, AE=Authentic Experienter

Price-Oriented Social Values Definitions

Buying on impulse: Tendency to purchase products on impulse, enticed by exciting advertising or packaging. Rarely seeking out information on products before buying.

Discount consumerism: Preferring to buy discount or private label brands, often from wholesalers, discount outlet stores or the sale displays at national retailers.

Discriminating consumerism: Seeking objective, comparative product information and carefully evaluating one's needs before making purchases. Preference for practical and functional products, satisfying real needs. This is the opposite of "buying on impulse."

Importance of brand: Giving great weight to the brand name of a product or service, with a tendency to favour certain brands. This is the reverse of "brand apathy," in which little importance is placed on the product's brand name.

Ostentatious consumption: Desire to impress others and express one's social standing by displaying objects that symbolize affluence.

Saving on principle: The tendency to save and accumulate money, motivated by a moral impulse for future security. A preference for frugality and denial to self of "luxuries."

Upscale consumerism: Preferring to buy mostly exclusive or prestigious brands that are more expensive and often only available from higher-end stores and boutiques.

