Canadian Tourism Commission

Commission canadienne du tourisme

Global Tourism Watch

2013 France Summary Report

Québec City

Canada

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1. Introduction

The Canadian Tourism Commission (CTC) began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to expand the base of consumer-based intelligence in 12 key markets.

The study approach has changed slightly for 2012 and 2013, the sixth and seventh years of the program, with the GTW being conducted in approximately one half of the markets in one year and the other half in the next. This new cycle will allow the CTC and its partners to maintain an up-to-date pulse on all key markets, while, at the same time, focusing on fewer individual countries in any given year creating some cost efficiencies. Eight markets were included for 2012: Canada, the US, the UK, Germany, Australia, China, South Korea, and Brazil. In 2013, the study was conducted in six countries – Japan, France, Mexico and India in addition to Canada and the US.

The overall objectives of the GTW study are to:

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

In response to a rapidly changing travel marketplace, the CTC and TNS worked together to substantially revise and update the questionnaire prior to the 2012 fieldwork. This was done to better reflect current travel realities and to gather more in-depth information on Canada's competitors in each market. The new GTW data permits direct comparison of Canada to those competitor countries unique to each market. The CTC has designated the US, Australia, Mexico, Thailand, South Africa and China as the competitive set for Canada in the French market.

Methodology

In 2013, a web-based panel survey was conducted by TNS. The target population for the online survey was residents aged 18 years and older, who had taken a pleasure trip where they stayed at least one night in paid accommodation in the past 3 years or who plan to take such a trip in the next 2 years.

Data was gathered from 1,517 respondents in France, including 301 recent visitors to Canada. Data was collected in June 2013.

2. Key Take-Aways

Despite considerable fiscal uncertainty in recent years, France remains the world's 5^{th} largest tourism market. The French took 40 million international trips in 2011, however, much of the volume is short-haul. Approximately one-quarter of French travel is considered long-haul, with the US, French Caribbean, Thailand, and China capturing the bulk of the market. Canada, with 423,000 arrivals in 2012, is in 5^{th} spot overall, capturing an estimated 5% of the French long-haul market. France has been a steady performer for Canada in recent years and is the 2^{nd} largest overseas market (excluding the US).

- While survey results show incidence of long-haul travel increased to 75% in 2013, up from 73% in 2011, the French market outlook is trending downwards as fewer travellers feel they will take more long-haul trips in the near future. Instead, significantly more believe they will take about the same number of trips, yielding a market outlook indicator of +24, down from +38 in 2011. Whether the French are planning to substitute short-haul trips for long-haul destinations or trim travel altogether is not known, but this is a worrying trend for Canada.

- Despite recent economic uncertainty, the top reason French travellers foresee possibly curtailing long-haul travel is international conflict rather than ability to afford a trip. The opportunity for Canada is to promote the relative safety of a Canadian vacation.

- Canada saw largely positive results on destination awareness and consideration measures in 2013, typically competing with the US and Australia. Despite a drop in mentions in 2013, Canada remains in 3^{rd} place behind the US and Australia on unaided awareness. Canada outpaces Australia on the aided awareness measure, but is now 2nd to the US, which recorded a 17% spike on this measure. In terms of future travel plans, Canada is ranked 2^{nd} to the US on unaided consideration and 1^{st} ahead of Australia and the US on the aided measure.

- French travellers appear enamoured with Australia awarding the destination five 1^{st} place finishes on brand personality perceptions – Beautiful, Informal, Inspirational, Authentic, and Intriguing. Canada places in the top-3 on six traits and is ranked 1^{st} on Friendly and Witty. Emphasizing these attributes in marketing campaigns may help to encourage French travellers to consider Canada over Australia.

- Australia is Canada's chief competitor in the minds of French travellers in terms of value and brand taking top billing on 6 attributes. Canada is seen to outperform Australia on engaging people, offering relevant experiences, and the two destinations are seen to offer an equally authentic experience. In the price realm, Canada and the US are tops for flight costs to reach the destination while Thailand outpaces Canada on overall value and in-destination costs (Mexico also ranks above Canada on this attribute). Australia is ranked well back on pricing perceptions suggesting the destination may be more of a dream than a reality for many French travellers. These results not only suggest Canada has a very good reputation among French travellers, but also identifies messages to emphasize in future marketing campaigns.

- Canada is strongly associated with beautiful scenery, the top experience sought by French travellers. However, Canada does not perform well on other experiences valued by French travellers such as national parks (ranked 3rd overall), historical and cultural attractions (5th place), as well as opportunities to experience a country's unique character and aboriginal culture (both ranked 6th).

- French travellers seek destinations that offer a combination of scenery, opportunities to experience local lifestyles, cultural and historical attractions, and aboriginal culture. Therefore, Canada cannot solely rely on its scenic attributes, as French travellers also seek interactions with Canadian culture and people.

- The US, and to a slightly lesser extent, the Caribbean continue to dominate the French long-haul market. However, Canada (tied for 3rd spot with central Africa) has a significant share of this market. Interestingly, Australia, a key competitor to Canada on many measures, garners just 4% of the recent trip market suggesting the country is an aspirational destination for many French travellers instead of a realistic one.

- The top barrier for visiting Canada by a wide margin is the perception that a Canadian trip is too expensive. This suggests the destination must do more to convince French travellers of the value of a Canadian vacation.

- The 2nd most cited barrier preventing a trip to Canada is a preference for other destinations. There are two opportunities here – Canada needs to continue to promote offerings beyond traditional outdoor-based experiences and, given the dominance of the US in this market (1.6 million arrivals in 2012) and growing interest in short (1-3 nights) visits to Canada, it may be worthwhile for Canada to look into dual country itineraries.

- 80% of French travellers recalled information on travel to Canada within the past year. In-person interactions remain the primary information source on Canada, followed by traditional off-line sources such as TV travel shows, travel guides, and brochures. The French appear less reliant on online information sources than some other markets with social networking and travel websites ranking lower on the list of recalled information sources (6th and 7th).

- Travel agents remain influential at the destination selection phase. Although the use of travel agencies to book is not as high as in other core markets, a travel agent was listed as the 2nd most influential source after personal recommendations in selecting a holiday destination.

- Canada achieved the highest Net Promoter Score, just ahead of Australia and well ahead of the US, the most popular destination for French travellers. There is considerable potential for past visitors to Canada to advocate on the destination's behalf, especially since the pool of past visitors is large (25%).

3. Market Health and Outlook

France Market Conditions & Outlook

France is Europe's 2nd largest economy and is the 5th largest in the world. Despite its economic clout, the country faces considerable challenges due to the ongoing Eurozone crisis, low consumer confidence, and weak consumer demand. While economic indicators are improving slowly as evidenced by GDP growth of 0.5% in the 2nd quarter of 2013 when the survey was conducted, which is the best result since 1st quarter 2011) . However GDP fell again to 0.1% in the 3rd quarter and is predicted to end the year at 0.1% illustrating France's economic recovery is still fragile. Forecasts for 2014 call for GDP growth of 0.7%. Inflation is running at approximately 2% and is expected to fluctuate between 1% - 2% through 2014. Unemployment is an ongoing concern in France and it remains above the European average. French unemployment rates are predicted to rise from 10% to 11% in 2013.

The prolonged period of economic uncertainty has taken a toll on French travel habits. The French outbound market grew by a modest 1% in 2012 and is predicted to perform below the European average of 2% in 2013. Despite tepid performance, France remains the world's 5th largest tourism market. The French took 40 million international trips in 2011; however, the majority of travel is concentrated in Europe and North Africa, with four destinations drawing the bulk of French travellers: Spain (9 million arrivals), Italy (4.9 million), UK (2.9 million), and Morocco (1.8 million).

Approximately 22% of French travel is considered long-haul, with the US, French Caribbean, Thailand, and China capturing the bulk of the market. Canada, with 423,000 arrivals in 2012, is in 5th spot overall, capturing an estimated 5% of the French long-haul market. France is Canada's 2nd largest overseas market (excluding the US) and is considered stable.

While GTW survey results show incidence of long-haul travel is up slightly in 2013 (75%, up from 73% in 2011), French travellers appear less optimistic about their ability to take long-haul trips in future causing the market outlook indicator to fall from +38 in 2011 to +24 in 2013 . It appears as though the long period of economic turmoil has caused French travellers to be more realistic about short-term travel prospects. Half of French travellers now believe they will travel a similar amount in the coming 2-3 years as they have in the recent past, up from 44% previously. More importantly,13% of travellers predict they will travel less in future, up from 9% previously. Whether travellers believe they will be sticking to short-haul destinations or cut back on travel altogether is not known, but the result is a concern for Canada and other long-haul destinations.

While the economic turmoil of recent years has had a noticeable impact on French travel habits, when asked what factors could curtail long-haul travel, French travellers were more apt to mention the threat of international conflict (38%) than affordability issues (34%). This suggests there is room for cautious optimism in the French travel market. Canada is advised to promote the relative safety of a Canadian vacation as well as value.

4. Market Potential

Exhibit 4.1 provides an estimate of the size of the potential market for Canada in two ways – the macro target market and immediate potential.

The target market is a broader estimate of the market size based on expressed interest among all French long-haul travellers (market size estimate derived from the 2010 omnibus study of the French adult population). The proportion of GTW respondents who are definitely, very interested, or somewhat interested in Canada in the next 2 years is applied to a broader traveller population a target market estimate of 13.6 million.

The immediate potential is a more conservative estimate based on GTW respondents who say they are definitely or very likely to visit Canada in the next 2 years. This translates into a market of 5.8 million travellers with more immediate potential for conversion. While the immediate market estimate is down by approximately 300,000 from 2011, the result is not directly comparable to previous years due to a change in the question wording.

Exhibit 4.1 – Size Of The Potential Market To Canada (Next 2 Years)

	Size of Potential Market to Canada
Total potential long-haul pleasure travellers (aged 18 plus)	15,299,000
Target Market for Canada	
Definitely / very / somewhat interested in visiting Canada in the next 2 years	89%
Size of the target market	13,616,000
Immediate Potential for Canada	
Will definitely / very likely visit Canada in the next 2 years [1]	38%
Immediate potential	5,814,000

Base: Long-haul pleasure travellers (n=1,517)

[1] Includes respondents likely to visit Canada on a trip of one to three nights or a trip of four nights or more.

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

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

Exhibit 4.2 shows the immediate potential for the regional partners of the GTW study based on current levels of interest. The immediate potential for the most popular regions (Québec and Ontario) is obviously considerable, with each of interest to over 4 million French travellers. The potential for British Columbia is significant as well with over 3 million travellers interested. Secondary destinations such as Atlantic Canada and Alberta are of interest to roughly 2 million French travellers.

Exhibit 4.2 – Market Potential For The Regions

	QC	ON	BC	ATL CAN	AB	NWT	NU	YK	MB	SK
Immediate potential for Canada	5,814,000									
Likely to visit region	82%	71%	60%	41%	30%	15%	11%	11%	10%	8%
Immediate potential for the regions (000s)	4,767	4,128	3,488	2,384	1,744	872	640	640	581	465

Base for percentages is those likely to visit Canada on a trip of 1-3 nights or 4+ nights in the next 2 years trip (n=1,008).

5. Competitive Environment

Exhibit 5.1 summarizes the 2013 Key Performance Indicators (KPIs) for Canada. On an unaided basis, 22% of respondents mentioned Canada as a long-haul travel destination, behind the US (38%) and Australia (26%). On an aided basis, 43% of French travellers claim to be knowledgeable about holiday opportunities in Canada, second to the US (51%) and ahead of Australia (37%). Canada has dropped to 2nd place as awareness of US vacation opportunities surged 16% since 2011 (Canada also experienced growth, but a more modest 7%).

From a trending perspective, unaided awareness of Canada as a destination has significantly dropped (25% in 2011 to 22% at present) after years of stable results. Despite the drop, Canada maintains a 3rd place position. In contrast, aided awareness climbed significantly, reaching an historic high in 2013, but trailing the US. This suggests that while knowledge of travel opportunities in Canada is growing, so is this knowledge of the US.

In terms of which respondents have visited a country at least once in their lifetime, Canada (25%) again comes 2nd on past visitation to the US (39%). Canada is far ahead of 3rd place Thailand (18%), Mexico (15%) and China (11%).

In terms of destinations under consideration for long-haul trips in the next 2 years, on an unaided basis Canada (13%) ranks 2nd behind the US (23%). On the aided measure, Canada in 1st place (89%) noses out Australia (88%), with the US in 3rd (84%). This is one of the few instances where Canada outperforms the US in the French market and is an opportunity for that needs to be capitalized on by the Canadian tourism industry.

Unaided consideration of Canada has dropped 3 points to 13% in 2013 after five consecutive reporting periods without a change. Conversely, aided consideration has trended slowly upward since 2007, until a sharp increase in 2013. However, this year's gain is likely attributable to a response scale change.

Exhibit 5.1 – Key Performance Indicators For Canada – Summary

Indicator	Definition	All L-H Travellers (n=1,517)
Unaided awareness of Canada (roll-up)	% who said Canada or a destination in Canada	22% (3rd)
Aided awareness of travel opportunities in Canada	% with excellent / very good knowledge of travel opportunities in Canada	43% (2nd)
Overall market penetration	% who have ever visited Canada for pleasure	25% (2nd)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list (for trips in next 2 yrs)	13% (2nd)
Competitive positioning on destination consideration	Rank on the consideration list relative to competitors (roll-up)	2nd

Base: Long-haul pleasure travellers

One of the key objectives of the GTW study is to measure traveller response to Brand Canada across all key global markets. For 2013, the study focus changed somewhat to measure personality, value, brand, and price perceptions against key competitors rather than Canada in isolation as was done previously.

In terms of personality trait association, Canada's top results were 1st place finishes for "Friendly" and "Witty" (one of the CTC's strategic priorities) with substantial leads over the 2nd placed destinations. Canada also was awarded five 2nd place finishes – behind the US for "Liberal", "Confident", and "Energetic" (tied with Australia) and trailing Australia on "Beautiful" and "Informal" (a CTC strategic priority). Canada appears to have a lot to work with given the number of personality traits that are performing well in French travellers' minds.

However, Canada did not fare so well among French respondents on "Inspirational", "Authentic" (a strategic priority) and "Intriguing" trailing Australia on these three traits. In fact, Australia takes top billing on half of all personal perceptions, followed by the US with three 1st place finishes, underlining the strength of these two destinations in the French market.

Exhibit 5.2 – Aided Brand Personality Perceptions

	1#	2#	3#	4#	5#	6#	7#	8#
Friendly[1]	CAN 47%	THA 35%	AUS 31%	MEX 28%	SAF 19%	USA 19%	CHN 10%	NONE 5%
Witty	CAN 31%	AUS 27%	USA 26%	THA 22%	NONE 19%	CHN 16%	MEX 14%	SAF 14%
Liberal[1]	USA 55%	CAN 45%	AUS 36%	NONE 13%	THA 8%	SAF 8%	MEX 6%	CHN 5%
Beautiful	AUS 48%	CAN 43%	THA 35%	USA 28%	MEX 26%	SAF 25%	CHN 20%	NONE 3%
Confident	USA 55%	CAN 39%	AUS 32%	NONE 16%	CHN 10%	THA 7%	SAF 7%	MEX 5%
Informal	AUS 42%	CAN 39%	USA 38%	THA 23%	MEX 17%	SAF 13%	NONE 8%	CHN 5%
Energetic[1]	USA 55%	AUS 36%	CAN 36%	CHN 18%	THA 13%	SAF 12%	MEX 10%	NONE 9%
Inspirational[1]	AUS 30%	THA 29%	CAN 27%	CHN 24%	USA 24%	MEX 21%	SAF 20%	NONE 11%
Authentic	AUS 33%	THA 33%	MEX 32%	CAN 32%	CHN 28%	SAF 26%	USA 13%	NONE 6%
Intriguing	AUS 39%	USA 32%	CHN 31%	THA 29%	CAN 29%	MEX 24%	SAF 22%	NONE 4%

Base: Long-haul pleasure travellers (2013 n=1,517)
Q10: We would like you to use your imagination for a moment. Consider the following words and pick up to 3 countries you associate with each word
Red text indicates CTC strategic priorities.
[1] New attributes added in 2012.

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

Overall, Canada's primary competition on brand and value attributes is Australia. The country recorded 1st place on six attributes, with Canada in 2nd spot, often narrowly behind. Specifically, Canada is top-ranked for engaging people and is tied with Australia for offering an authentic experience. Canada is just behind Australia on inspiring geography and culture. In the value category, Canada finishes 1st on relevant travel experiences, but is outpaced by Australia on quality, uniqueness, and desirability.

When it comes to pricing perceptions, either the US, Thailand or Mexico are the competition depending on the attribute. Canada is 1st (tied with the US) for "a destination that is affordable to get to by air"; 2nd to Thailand for overall value for money and 3rd behind Thailand and Mexico for in-destination costs.

Exhibit 5.3 – Brand, Value, Price Perceptions

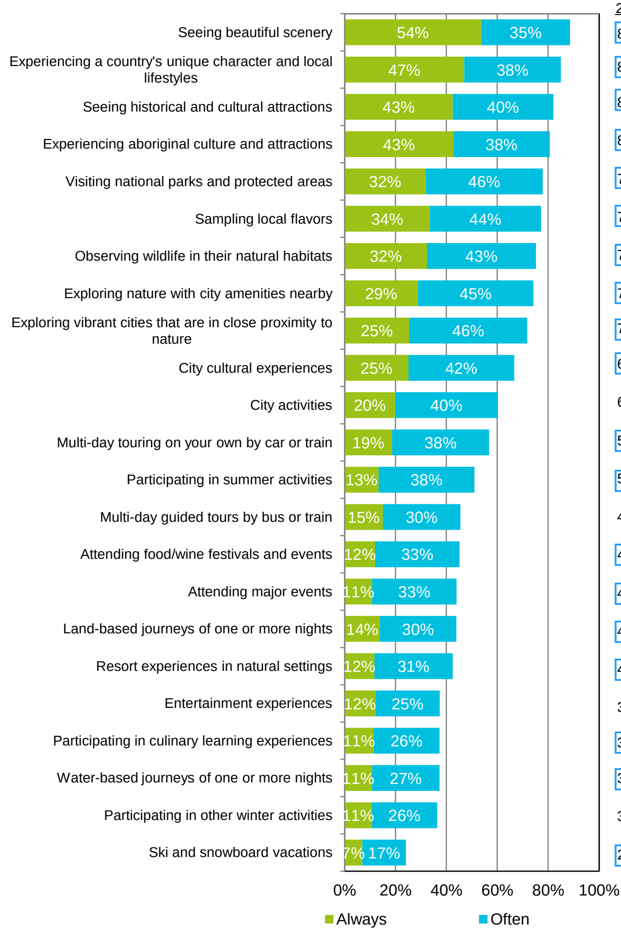
Top-3 Box	1#	2#	3#	4#	5#	6#	7#
Brand Perceptions							
A place that inspires me to meet and engage with its people	CAN 69%	AUS 60%	MEX 54%	USA 51%	THA 51%	SAF 45%	CHN 42%
A place that inspires me to explore its geography	AUS 75%	CAN 74%	USA 65%	SAF 57%	MEX 57%	THA 54%	CHN 50%
A place that inspires me to explore its culture	AUS 66%	CAN 63%	MEX 62%	THA 60%	CHN 57%	SAF 52%	USA 47%
A place that offers an authentic experience	AUS 69%	CAN 69%	THA 59%	MEX 58%	CHN 54%	SAF 53%	USA 50%
Value Perceptions							
A destination with the travel experiences I am specifically looking for (Relevance)	CAN 59%	AUS 58%	USA 51%	MEX 46%	THA 42%	SAF 38%	CHN 37%
A destination I would pay a little more for (Quality)	AUS 48%	CAN 47%	USA 41%	THA 36%	MEX 32%	CHN 30%	SAF 30%
A place with unique features that other destinations don't offer (Uniqueness)	AUS 63%	CAN 61%	USA 53%	THA 52%	MEX 51%	CHN 49%	SAF 47%
A dream destination that I would visit if money were no object (Desirability)	AUS 68%	CAN 64%	USA 55%	MEX 52%	THA 49%	SAF 45%	CHN 43%
Price Perceptions							
A destination that is affordable to get to by air	CAN 45%	USA 45%	THA 42%	MEX 35%	SAF 27%	CHN 26%	AUS 25%
A place that offers good value for money	THA 49%	CAN 41%	MEX 39%	USA 36%	CHN 33%	AUS 29%	SAF 27%
A destination with reasonable prices for food, entertainment and hotels	THA 52%	MEX 41%	CAN 40%	USA 36%	CHN 35%	AUS 30%	SAF 29%

Base: Long-haul pleasure travellers (n=1,517)
Q11: We are interested in your general impressions of <Insert country>, as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is "strongly disagree" and 10 is "strongly agree," how would you rate <Insert country> on each of the following?

Exhibit 5.4 tracks the product interests of French travellers. It is important to note that the question changed in 2013 to ask about the importance of experiences when choosing a destination rather than when planning a trip. Some of the shifts evident in the 2013 results are attributable to this change and thus, results are not comparable to previous years.

Results show French travellers seek destinations that offer a combination of scenery, opportunities to experience local culture, and historical and cultural attractions including aboriginal experiences. The implication for the Canadian tourism industry is not to rely solely on Canada's scenic attributes as French travellers also seek interactions with Canadian culture and people.

Exhibit 5.4 – Product Interests



Top-2-Box

	2013	2011	2010	2009
Seeing beautiful scenery	89%	92%	91%	93%
Experiencing a country's unique character and local lifestyles	85%	89%	87%	90%
Seeing historical and cultural attractions	82%	87%	86%	88%
Experiencing aboriginal culture and attractions	81%	86%	86%	88%
Visiting national parks and protected areas	78%	87%	86%	86%
Sampling local flavors	77%	89%	91%	91%
Observing wildlife in their natural habitats	75%	85%	85%	84%
Exploring nature with city amenities nearby	74%	84%	85%	86%
Exploring vibrant cities that are in close proximity to nature	72%	84%	85%	86%
City cultural experiences	67%	75%	75%	76%
City activities	60%	59%	59%	58%
Multi-day touring on your own by car or train	57%	65%	60%	65%
Participating in summer activities	51%	62%	62%	63%
Multi-day guided tours by bus or train	46%	46%	44%	43%
Attending food/wine festivals and events	45%	51%	50%	48%
Attending major events	44%	53%	48%	49%
Land-based journeys of one or more nights	44%	52%	50%	49%
Resort experiences in natural settings	43%	54%	52%	51%
Entertainment experiences	37%	38%	33%	32%
Participating in culinary learning experiences	37%	47%	45%	46%
Water-based journeys of one or more nights	37%	44%	40%	43%
Participating in other winter activities	36%	38%	37%	39%
Ski and snowboard vacations	24%	33%	32%	32%

Base: Long-haul pleasure travellers (2013 n= 1,517) (2011 n=1,491) (2010 n=1,503) (2009 n=1,492)
Q7: We are interested in knowing the types of activities and experiences you are looking for on your long-haul holidays. Please indicate how important each of the following activities is to you when choosing long-haul destinations.
Note: Results not comparable to previous years due to changes in the question wording in 2012 and to the product list in 2011.
Blue squares indicate a result that is significantly lower than 2011. Red circles indicate a result that is significantly higher than 2011.

Exhibit 5.5 shows how Canada ranks against the competition on each product. Canada is top ranked in 8 categories – most of which are associated with outdoor experiences. Canada outranks Australia and the US on these experiences. However, highly sought after cultural and historical experiences, aboriginal attractions, and unique local experiences are typically associated with Thailand and Mexico, with Canada ranked well back. The challenge is to convince French travellers that Canada can also offer these experiences.

Exhibit 5.5 – Product Interest Associations By Country

	1#	2#	3#	4#	5#	6#	7#	8#
Participating in other winter activities	CAN 70%	USA 26%	AUS 11%	NONE 11%	MEX 6%	THA 6%	CHN 5%	SAF 4%
Seeing beautiful scenery	CAN 55%	AUS 49%	USA 47%	SAF 25%	CHN 18%	THA 18%	MEX 16%	NONE 3%
Ski and snowboard	CAN 52%	USA 32%	NONE 17%	AUS 14%	CHN 8%	SAF 8%	THA 7%	MEX 7%
Participating in summer activities	CAN 44%	AUS 37%	USA 31%	SAF 17%	NONE 17%	THA 15%	MEX 15%	CHN 7%
Exploring nature with city amenities nearby	CAN 43%	AUS 41%	USA 30%	SAF 26%	THA 21%	MEX 20%	CHN 14%	NONE 10%
Exploring vibrant cities that are in close proximity to nature	CAN 43%	AUS 40%	USA 39%	SAF 21%	THA 21%	MEX 16%	CHN 15%	NONE 10%
Land-based journeys of one or more nights	CAN 40%	AUS 39%	USA 29%	NONE 18%	THA 17%	MEX 16%	SAF 16%	CHN 11%
Water-based journeys of one or more nights	CAN 39%	AUS 34%	USA 31%	THA 18%	NONE 17%	MEX 16%	SAF 15%	CHN 5%
City cultural experiences	USA 57%	CAN 36%	AUS 29%	CHN 22%	MEX 20%	THA 13%	SAF 11%	NONE 10%
Resort experiences in natural settings	USA 34%	CAN 34%	AUS 29%	NONE 20%	SAF 20%	THA 19%	MEX 14%	CHN 8%
Multi-day guided tours by bus or train	USA 37%	CAN 32%	AUS 31%	CHN 24%	MEX 23%	THA 21%	SAF 19%	NONE 12%
Attending major events	USA 50%	CAN 31%	AUS 31%	NONE 19%	SAF 15%	CHN 12%	MEX 11%	THA 9%
Entertainment experiences	USA 56%	CAN 27%	AUS 25%	THA 20%	MEX 17%	NONE 15%	CHN 10%	SAF 9%
Visiting national parks and protected areas	AUS 47%	USA 43%	CAN 41%	SAF 40%	THA 14%	MEX 12%	CHN 10%	NONE 5%
Multi-day touring on your own by car or train	USA 43%	AUS 39%	CAN 38%	SAF 18%	MEX 17%	THA 17%	CHN 15%	NONE 12%
City activities	USA 60%	AUS 29%	CAN 37%	CHN 18%	THA 19%	SAF 9%	MEX 10%	NONE 11%
Observing wildlife in their natural habitats	SAF 52%	AUS 51%	CAN 37%	USA 18%	THA 18%	MEX 13%	CHN 10%	NONE 5%
Sampling local flavours	THA 51%	MEX 43%	CHN 41%	CAN 20%	AUS 18%	SAF 17%	USA 16%	NONE 7%
Seeing historical and cultural attractions	MEX 42%	CHN 40%	USA 36%	THA 31%	CAN 24%	AUS 23%	SAF 15%	NONE 5%
Attending food / wine festivals and events	AUS 28%	NONE 27%	USA 27%	SAF 20%	CAN 20%	MEX 19%	THA 18%	CHN 15%
Experiencing a country's unique character and local lifestyles	THA 43%	MEX 36%	CHN 35%	AUS 32%	SAF 28%	CAN 22%	USA 18%	NONE 5%
Experiencing aboriginal culture and attractions	THA 42%	MEX 37%	AUS 34%	CHN 34%	SAF 32%	CAN 18%	USA 16%	NONE 5%
Participating in culinary learning experiences	THA 33%	CHN 26%	MEX 24%	NONE 23%	AUS 19%	CAN 17%	USA 17%	SAF 14%

Base: Always, often and sometimes important in destination selection (Q7)
Q8: Thinking about the following destinations, please select up to three destinations that you personally feel would be the best places to go for each of the following. Your choices can be based on your impressions, or anything that you have seen, heard or read. Select one to three destinations ONLY that you feel are best for each item.

6. Strategic Marketing

Exhibit 6.1 shows the dominance of the US in the French travel market, being the most recent destination of almost one-quarter of long-haul travellers. The Caribbean is also a popular destination. Africa (beyond Northern Africa and South Africa) and Canada are tied for 3rd spot. Given the dominance of the US, there is considerable opportunity for Canada to promote dual country itineraries to capture a portion of the US-bound market.

Trip planning and booking cycles are relatively lengthy in France, underscoring the importance for Canada to be active in the marketplace throughout key times during the year. Almost half of French travellers seek travel agent advice on their long-haul trips, suggesting maintaining relationships with key trade influencers is warranted. Just over half of French travellers travel independently with a further 19% opting for an all-inclusive and 17% for a guided trip. Nearly three-quarters travel for leisure with only 15% travelling for VFR purposes.

Exhibit 6.1 – Most Recent Pleasure Trip Profile

	All L-H Travellers (n=1,107)
Destination (s) Visited	
United States (excluding Hawaii)	24%
Caribbean (e.g. Bahamas, British Virgin Islands, Cuba, Dominican Republic, Jamaica, Netherlands Antilles, Puerto Rico, US Virgin Islands, etc.)	16%
Other Africa excluding North Africa	8%
Canada	8%
South Africa	6%
Other Southeast Asia (e.g. Cambodia, Indonesia, Malaysia, Philippines, Vietnam)	6%
Middle East (e.g. Bahrain, Cyprus, Dubai, Israel, Jordan, Iran, Lebanon, Qatar, UAE, etc.)	5%
Thailand	5%
Australia	4%
China	4%
Amount of Time Before Departure When Trip Planning was Started	
Average months	4.8
Amount of Time Before Departure When Trip was Booked	
Average months	3.4
Trip Type	
Travel independently	54%
Combine independent travel with some guided tours for parts of the trip	7%
A fully escorted or guided tour	17%
All inclusive or semi-inclusive resort stay	19%
A cruise	3%
Trip Purpose	
Holiday	73%
Visited friends or relatives	15%
Business	5%
Study	1%
Personal reasons (e.g., wedding, reunion, etc.)	5%
Travel agent involvement	45%

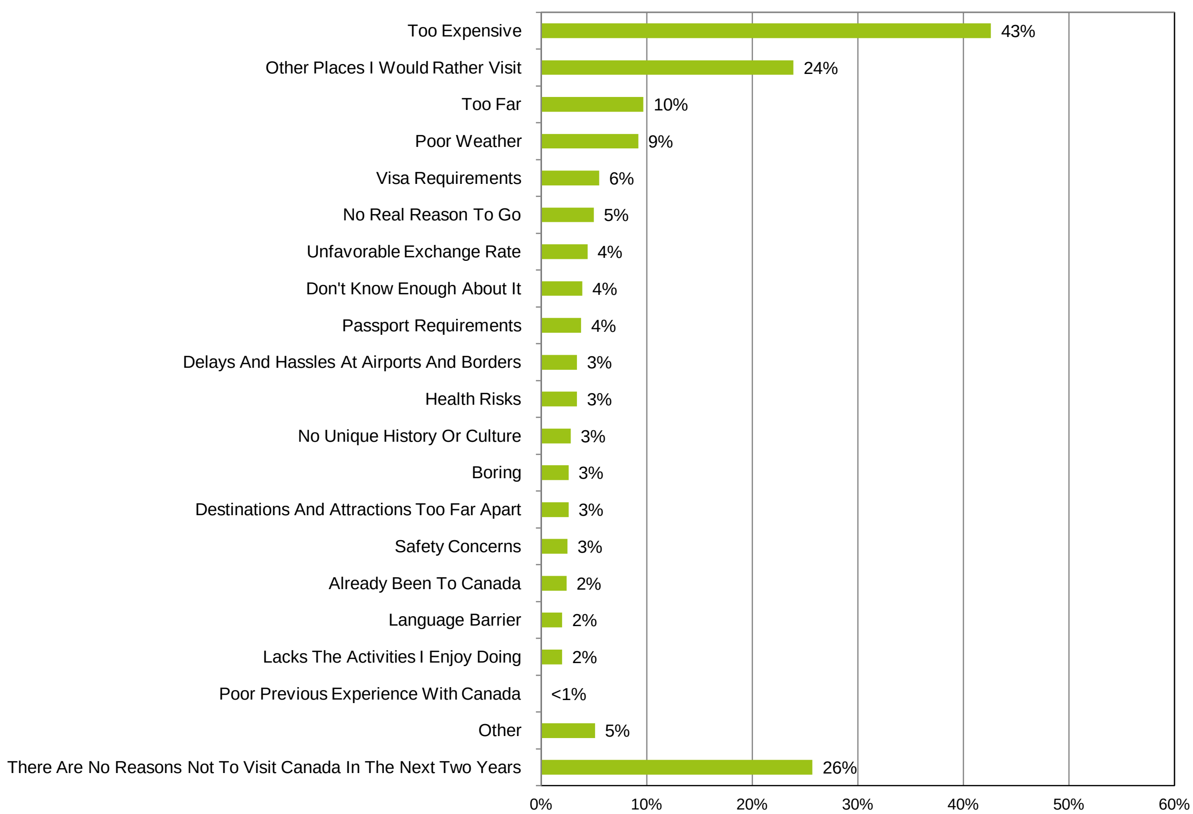
Base: Those who have taken a long-haul pleasure trip in the past three years

Recent visitors to Canada tend to be middle-aged or older. They also tend to be married, well-educated, and wealthy. More than one-third of visitors have close friends or family living in Canada. Personal connections are a big draw both for recent visitors and those considering Canada, which the tourism industry is encouraged to leverage.

All respondents were asked what factors may prevent them from visiting Canada in the short-term. The top reason by a wide margin was the perception that a trip to Canada was cost prohibitive which suggests the destination must do more to convince French travellers of the value of a Canadian vacation. Nearly a quarter had a preference for other destinations suggesting the Canadian tourism industry needs to broaden marketing efforts beyond traditional nature-based experiences to convince travellers of Canada’s cultural offerings, including aboriginal experiences.

One-quarter of respondents said there was no reason <u>not</u> to visit Canada.

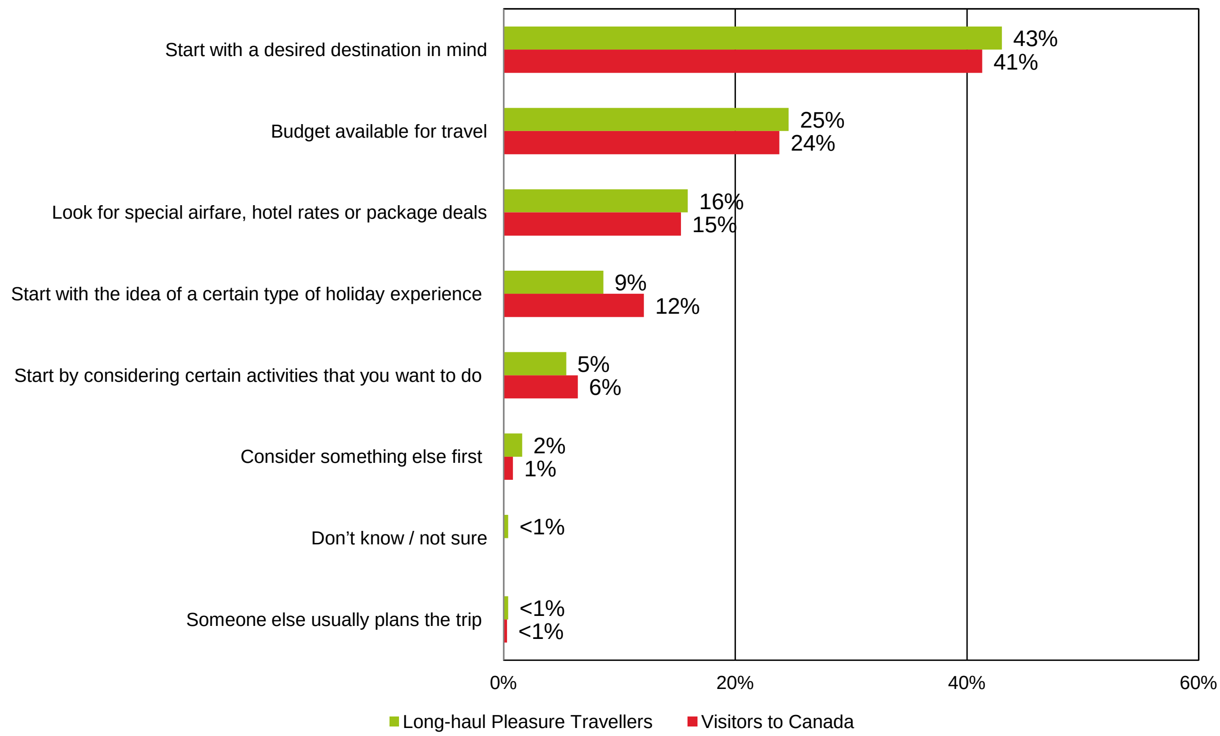
Exhibit 6.2 – Key Barriers For Visiting Canada



Base: Long-haul pleasure travellers (n= 1,517)
Q18: Please indicate which of the following reasons could prevent you from visiting Canada in the next two years.

A new question asked travellers what one factor is the first consideration in trip planning. Results show that the majority of French travellers see the destination as paramount, while budget considerations are of primary concern to a smaller portion of the market. This result suggest once French residents have decided they have the means to travel, budget is secondary. Therefore, getting Canada on French travellers' short list of destinations is key to achieving greater success in this market.

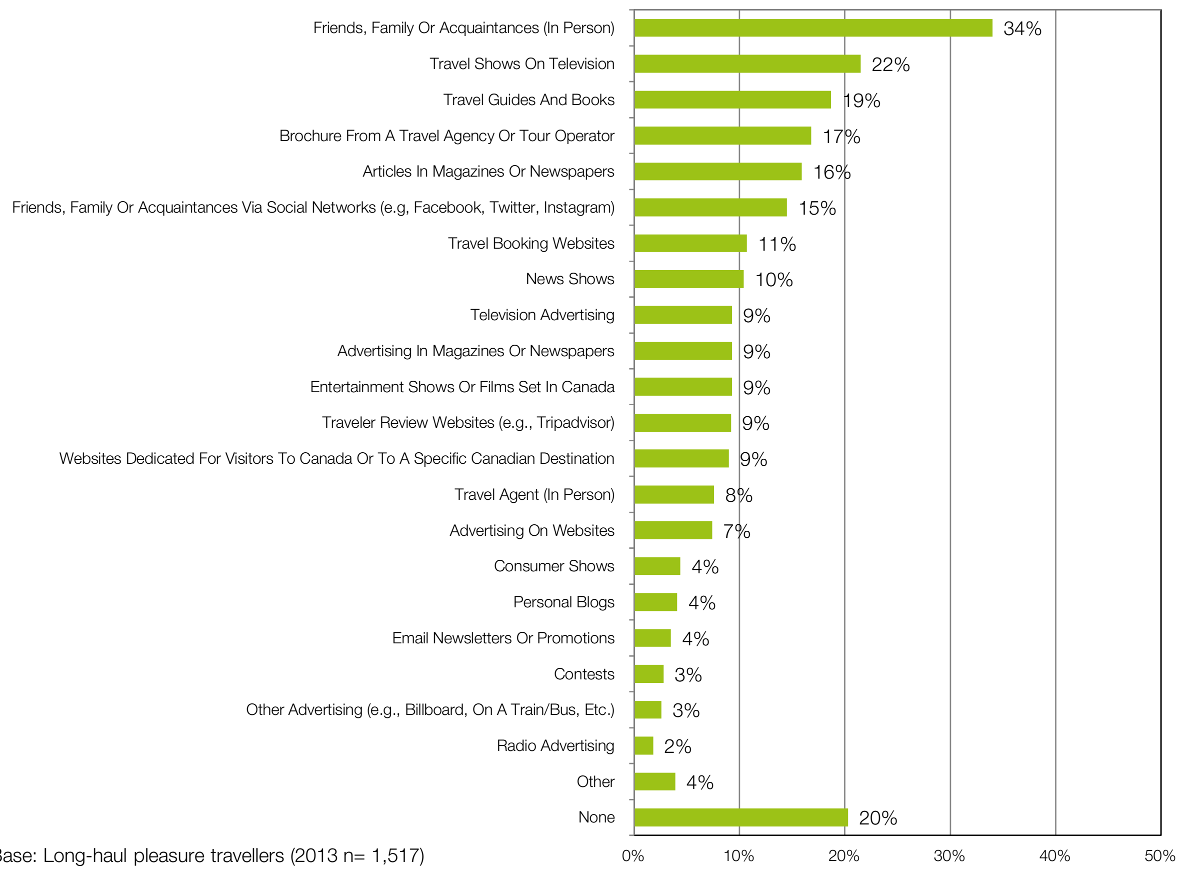
Exhibit 6.3– One Factor Typically Considered First When Planning A Trip



Base: Long-haul pleasure travellers (n=1,517). Long-haul pleasure travellers who visited Canada in the past three years (n=302)
QS9: What one factor do you typically consider first when planning a long-haul trip?

Eighty percent of French travellers recalled information on travel to Canada within the past year. In-person interactions remain the primary information source on Canada, followed by traditional off-line sources such as TV travel shows, travel guides and books, and travel agency brochures. French travellers appear less reliant on online information sources than some other markets with social networking and travel websites being lower on the list of recalled information sources (6th and 7th respectively). This is despite the fact that 80% of French travellers are active on social media, with Facebook, YouTube and Twitter being most used most frequently. This finding suggests French travellers do not rely primarily on online sources at the research / planning stages, but rather prefer traditional information sources such as word of mouth recommendations and travel shows on television.

Exhibit 6.4 – Sources Of Information On Canada In The Past Year



Base: Long-haul pleasure travellers (2013 n= 1,517)

Q20: In which of the following sources, if any, did you see or hear information about travelling to Canada during the past year?

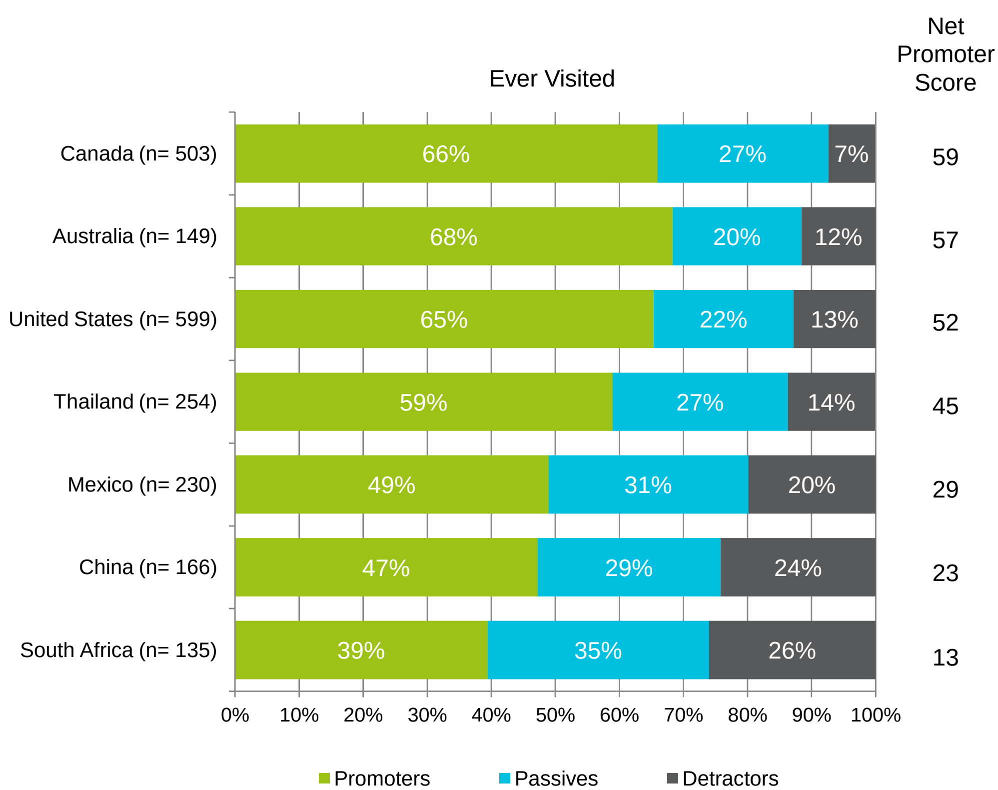
Note: Results not comparable to previous years due to changes to the statement list in 2012.

A series of questions on advocacy and social media usage were added to understand the evolving role these channels are playing in the tourism sphere and uncover ways the CTC and partners can effectively have influence.

The Net Promoter Score is an established tool to measure a respondent's likelihood to recommend a product or service to friends and family. Data was gathered among all respondents, but results from past visitors to each destination are the most telling and are presented below. Canada scored extremely well on this measure, placing 1st ahead of Australia and most importantly, the US, the top destination of French travellers.

Given the high level of past visitation to Canada (25% have ever visited), strong Net Promoter results, and French travellers' heavy reliance on personal recommendation when choosing a destination suggests Canada has considerable advocacy potential in France. The challenge for the Canadian tourism industry to find effective ways to tap into this potential to attract more French visitors.

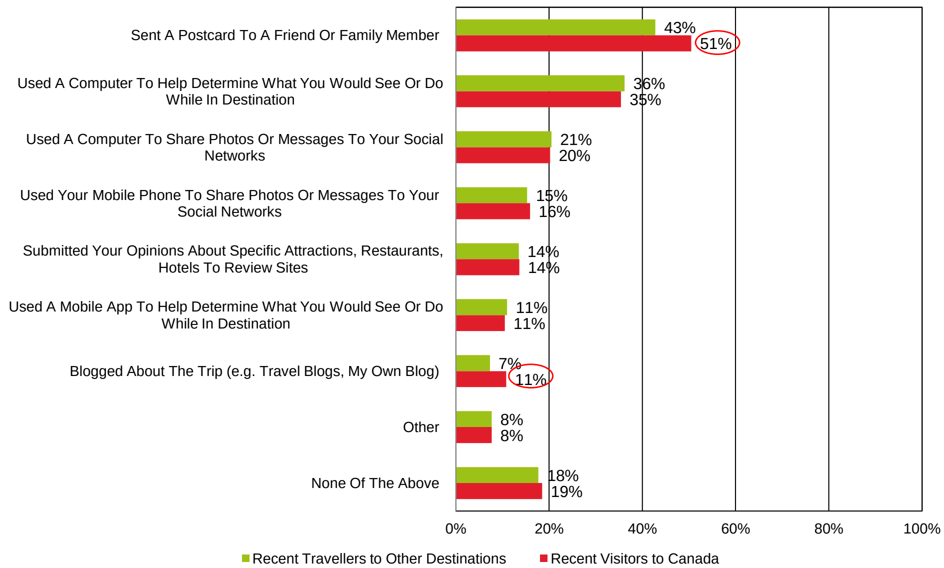
Exhibit 6.5 – Net Promoter Results



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

Two new questions asked French travellers about sharing behaviour during and after their trip. During the trip, the most popular activity – particularly among those visiting Canada – was sending a postcard. Also, using a computer to research and find activities while in a destination is popular with about one-third of travellers.

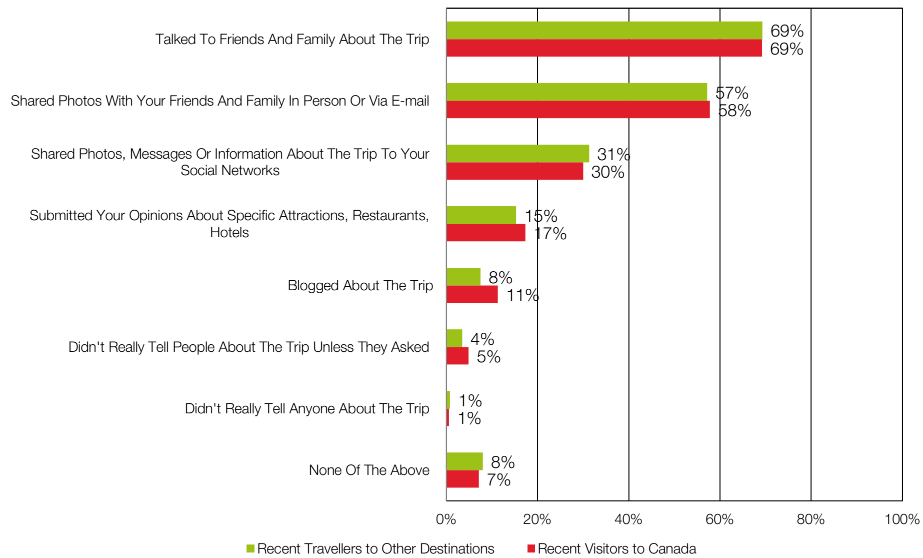
Exhibit 6.6 – During The Trip: Sharing Experiences / Seeking Advice



Q31: During your recent trip to <country> , did you share your trip experiences with anyone or seek advice? (Select all that apply)

Post-trip sharing is done largely in-person. Photo sharing, either in-person or by email, is also popular. About one-third share experiences via social networks.

Exhibit 6.7 – After The Trip: Sharing Experiences



Base: Recent travellers to other destinations in the past 3 years (n=805). Recent travellers to Canada in the past three years (n=302)

Q32: After coming back from your trip did you share experiences with anyone?

Note: Blue squares indicate a result that is significantly lower than the other group; Red circles indicate a result that is significantly higher than the other group.