



Global Tourism Watch

2016 France Summary Report



Table of Contents

1. Introduction	1
Methodology.....	1
Background.....	2
2. Market Potential	3
3. Competitive Environment – Key Performance Indicators Summary	5
Consideration	6
Knowledge	6
Visitation.....	7
4. Path-to-Purchase	7
Destinations	11
5. Vacation Activities	12
6. Barriers.....	15
7. Recent Trip Profile.....	17
Trip Purpose.....	17
Motivators.....	17
Travel Party.....	18
Booking	18
Type of Accommodation	18
8. Marketing Tactics	19
Sources Used to Look for Information	19
Resources, Devices Used to Plan Recent Trip.....	19
9. Destination Canada’s French Target.....	20

1. Introduction

Destination Canada began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to provide consumer-based intelligence in 12 core markets around the world: Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom, the United States, and the domestic Canadian market.

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 competitors over time;
- Identify the general experiences sought by travellers, and identify growth opportunities;
- Identify motivators and barriers for travel to Canada; and,
- Determine the influence of various information sources on destination selection.

The GTW permits direct comparison of Canada to competing destinations in each market. Destination Canada has designated the following destinations as competitors in the French market: the US, Thailand, China, Australia, India, South Africa, Japan, Iceland, and South Korea.

Methodology

Data was collected via an online survey and has been weighted to represent the French long-haul travel population. The target population in France was residents aged 18 years and older, who have taken a long-haul pleasure trip outside of Europe, North Africa and the Mediterranean where they had stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years.

Data was gathered from 1,501 respondents in France, including 302 recent visitors to Canada, in December 2016. In the past, data has been gathered earlier in the year (April through July), which is prime planning season for summer travel to destinations such as Canada. It is believed the timing of data collection impacts results and the later field window this wave may be responsible for some shifts in Key Performance Indicators (KPIs).

Figure 1.1: Study Overview: France Market

The target population are residents aged 18 years and older, who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years.



Background

France has the fifth largest economy in the world and represents around one fifth of the Euro area GDP. The country's GDP increased by 1.2% year-over-year in 2016 and is expected to continue strengthening to 1.5% by 2018, boosted by investment and consumption (*OECD, 2017*). This represents a positive trend compared to the 0.9% average growth observed over the past decade. However, growth remains below average in comparison to other EU Member States.

France will hold national presidential elections in April 2017. A state of emergency, imposed following the terrorist attacks in Paris in November 2015, remains in place after the attack in Nice in July 2016. The attacks have boosted support for the far-right Front National (FN) and changed the political landscape. Economic recovery is predicted to falter in 2017 given the uncertainty caused by the presidential elections and the UK's vote to leave the EU (*Economic Intelligence Unit, 2017*). In addition, the Euro's depreciation against the US dollar during 2016 did not bode well for various sectors of the economy, including outbound tourism, but the currency is expected to rebound in 2017.

The population growth rate of France is quite low at 0.4% in 2016 (*OECD, 2017*). Immigrants account for around 12% share of the population and, despite being a country with a significant immigrant population, France received far fewer asylum applicants relative to their population size than other countries, seeing a relatively modest 0.2% increase in its foreign-born share since 2015 (*Pew Research, 2017*).

France's unemployment rate was 9.8% by the end of 2016, which is slightly higher than the Euro Area unemployment rate of 9.6% (*Trading Economics, 2017*). An improvement is expected in 2017 with the unemployment rate decreasing to 9.6%. The downward trend is due to stronger economic growth in combination with tax reductions and hiring subsidies, which have incentivized hiring. France had an average inflation rate of 0.6% in 2016 (*Global-Rates, 2017*), lower than the Euro Area inflation rate of 1.8% (*Trading Economics, 2017*).

In December 2016, the Consumer Confidence Index stood at 99, and it is projected to increase slightly to just over 100 in 2017, due in part to lessened fears about unemployment rates (*National Institute of Statistics and Economic Studies, 2016*).

France is the world's fifth largest outbound tourism market, growing by 7% year-over-year and reporting US\$41 billion in tourism expenditure in 2016. It is the third largest market within Europe, behind Germany and the UK (*United Nations World Tourism Organization, April 2017*).

2. Market Potential

GTW data is used to estimate the size of the potential market for Canada. The table below provides an estimate of the size of the potential French market for Canada in two ways – the macro target market and the immediate potential market.

The long-haul travel market size is derived from a 2016 omnibus study of the French adult population. Note that the long-haul market size was last calculated in 2010 and has declined by 1.46 million. This decline is explained by an overall decrease in the incidence of long-haul travellers in the French market from 32% in 2010 to 28% in 2016. Long-haul travel incidence is comprised of travellers who indicate that they have travelled for a long-haul pleasure trip in the past three years, or intend to do so in the next two years. While the incidence of past three year travel has decreased since 2010 (from 26% to 21%), the next two year outlook for long-haul travel has increased (from 18% to 19%).

The proportion of GTW respondents who are in the dream to purchase stages for Canada (77%) is used to calculate a target market estimate of 10.68 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 two years. This translates into a market of 5.05 million travellers with more immediate potential for conversion.

Among DC's eleven international markets, France is ranked 4th in immediate potential market size (behind the US, China and South Korea) and in actual visitation among DC's international markets in 2016¹. This means that Canada is doing well at converting potential travellers to actual visitors in the French market.

For context, Canada attracted 546,000 visitors from France in 2016, an increase of 9% over 2015 and Canada's best ever result for this market.² The 546,000 arrivals represent 11% of the immediate potential market.

¹ *Destination Canada, Tourism Snapshot, December 2016.*

² *Destination Canada, Tourism Snapshot, December 2016.*

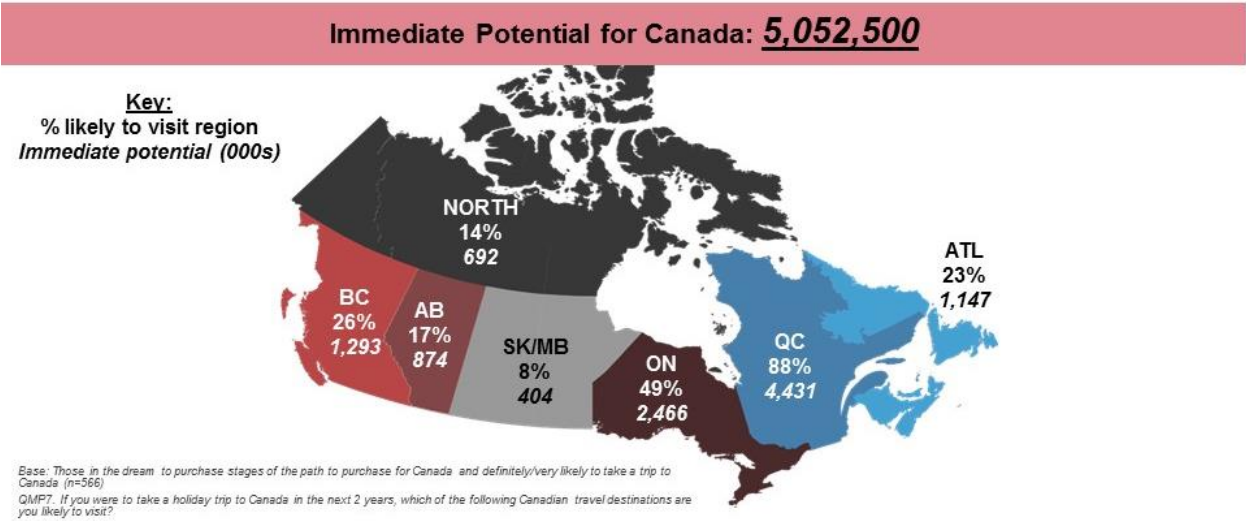
Figure 2.1: Size of Potential Market to Canada (Next 2 Years)

Measure	Size of Potential Market to Canada
Long-haul pleasure travel market	13.84 million
Target market for Canada (dream to purchase stage)	77%
Size of the target market	10.68 million
Immediate potential for Canada (definitely/very likely to visit in next 2 years)	47%
Immediate potential	5.05 million

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1,164)
 QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
 QMP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

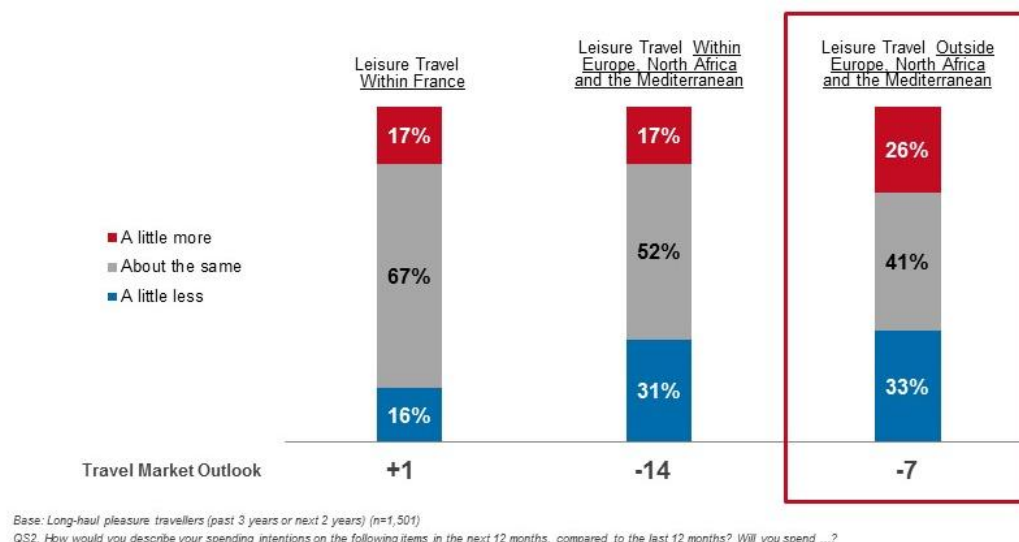
Also of interest is the demonstrated interest in Canada’s regions among the Immediate Potential Market (5.05 million). French travellers expressed the most interest in visiting Quebec (88% or 4.4 million potential visitors), followed by Ontario (49% or 2.4 million potential visitors).

Figure 2.2: Potential Market Size for the Regions



Travel intentions among French travellers are trending downwards. The proportion of French travellers saying they will spend less on travel beyond France is higher than those saying they will spend more, resulting in a negative outlook for both short-haul travel within Europe, North Africa and the Mediterranean (-14) and travel outside Europe, North Africa and the Mediterranean (-7). Instead, French travellers appear more likely to travel domestically (+1).

Figure 2.3: Spending Intentions (in the Next 12 Months)



3. Competitive Environment – Key Performance Indicators Summary

The outlook for Canada in France is favourable. Out of the 10 competitive destinations that respondents were asked to evaluate, Canada is 2nd to the US on aided and unaided consideration and on destination knowledge.

The GTW tracks the following Key Performance Indicators (KPIs) for Canada: unaided and aided destination consideration, aided destination knowledge, and past visitation. Canada’s performance is tracked against key competitors for the long-haul travel market. The competitive set was updated for 2016 to reflect actual travel patterns from each market. The countries included represent 95% of the outbound travel volume to long-haul destinations which are considered direct competitors to Canada (e.g., non-beach destinations). For France, these destinations are the US, India, Thailand, Australia, China, South Africa, Japan, Iceland, and South Korea. Japan, India, Iceland, and South Korea were not in the competitive set previously. It is also important to note that 2016 data was collected in December versus earlier in the year (April to July) in previous years. Seasonality may have impacted KPI results this year, although it is impossible to know how much the results might have been affected.

Consideration

Unaided consideration represents top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. Unaided consideration indicates that a strong impression has rooted in the mind of a traveller for a destination. From a marketing perspective, travellers who have Canada on their unaided consideration list may be easier to attract since they are actively thinking of Canada as a travel destination. On an unaided basis, 14% of French travellers mentioned Canada as a destination under serious consideration in the next 2 years – trailing the US by a wide margin (24%), but mentioned more than twice as often as other competitive destinations such as Japan (7%), Thailand (7%), and Australia (6%). Those who have visited Canada recently were more likely to mention Canada on an unaided basis (23%). Very few specific places in Canada were mentioned by French long-haul travellers, with the majority just saying Canada, suggesting knowledge of specific Canadian destinations is low.

Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, but only after they are prompted with a list of competitive destinations. Travellers who have aided consideration for Canada may not be thinking of Canada top-of-mind, but they are considering a visit. Continued prompts and cues through marketing efforts could help move these considerers down the Path to Purchase. Canada fares better on an aided basis with 36% saying they are seriously considering Canada for a leisure trip in the next 2 years, again placing second to the US but by a much smaller margin (38%). Younger French travellers aged 18-34 are more likely to consider Canada than their older counterparts, however, the US outperforms Canada among this group (46% vs 41%). While interest levels among older travellers aged 55+ are generally lower for all competitive set destinations, interest in visiting Canada exceeds interest in the US (35% vs 27%). A similar pattern is noted among recent visitors to Canada (53% are interested in visiting Canada vs. 40% for the US). Knowing that past visitors are more interested in returning, it is important to attract new visitors, with younger travellers representing a greater opportunity.

Knowledge

The aided destination knowledge KPI (previously called aided awareness, but changed for clarity purposes) measures knowledge of travel opportunities in each destination. Thirty-five percent of all French long-haul travellers rate their knowledge of travel opportunities in Canada as either excellent or very good. Among those considering Canada, destination knowledge stands at 46%, which puts Canada in a three-way tie for second place with Thailand and Japan (46%, respectively), but behind the top-ranked US (54%). Efforts to boost knowledge of Canadian travel opportunities could help to move potential visitors along the path-to-purchase.

Visitation

In terms of past visitation, 36% of French long-haul travellers have visited Canada on a leisure trip at some point in their lifetime. Those considering a trip to Canada are considerably more likely to have visited previously (42%). Messaging designed to encourage a repeat visit is recommended since past visitors to Canada voice considerably higher interest in returning.

Figure 3.1: Key Performance Indicators

Key Performance Indicators (KPIs) for Canada – Summary				
Indicator	Definition	All Long-Haul Travellers (n=1,501)	Recent Visitors to Canada ¹ (n=302)	Considering Canada ² (n=322)
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ³	14%	23%	30%
Competitive positioning on aided destination consideration	Rank on the consideration list among 10 destinations	2	1	1
Destination knowledge:				
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	35%	61%	49%
Past visitation:				
Past visitation	% who have ever visited Canada for pleasure	36%	98%	42%

¹ Visited Canada in the past 3 years (pleasure trip of 4 or more nights, with at least 1 night in paid accommodations).

² Those in the consider to purchase stages of the path to purchase for Canada.

³ For trips in the next 2 years.

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

Q58. You mentioned that you are likely to take a long-haul holiday trip outside of Europe, North Africa and the Mediterranean in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations.)

Q6V01. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years?

Q1F3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations (asked only for destinations in consideration set)?

Q1T14a. Approximately, how many times have you been to Canada?

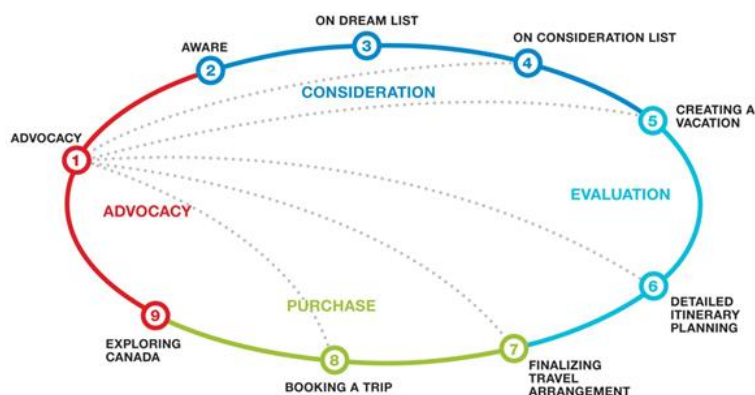
4. Path-to-Purchase

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

Through additional research, Destination Canada has developed a nine stage Path-to-Purchase (P2P) model for long-haul travel, starting with awareness of the opportunity and interest in a destination, through to planning an itinerary, and booking travel and accommodations. The final stage, advocacy, happens during and after the actual visit.

Destination Canada wants to understand where the organization can have the greatest influence in converting those with interest in Canada to actual visitors.

Figure 4.1: DC's Path-to-Purchase Model



In addition to looking at individual stages of the P2P, Destination Canada has identified phases travellers move through in the purchase cycle. Key phases are defined below and are referenced throughout this report.

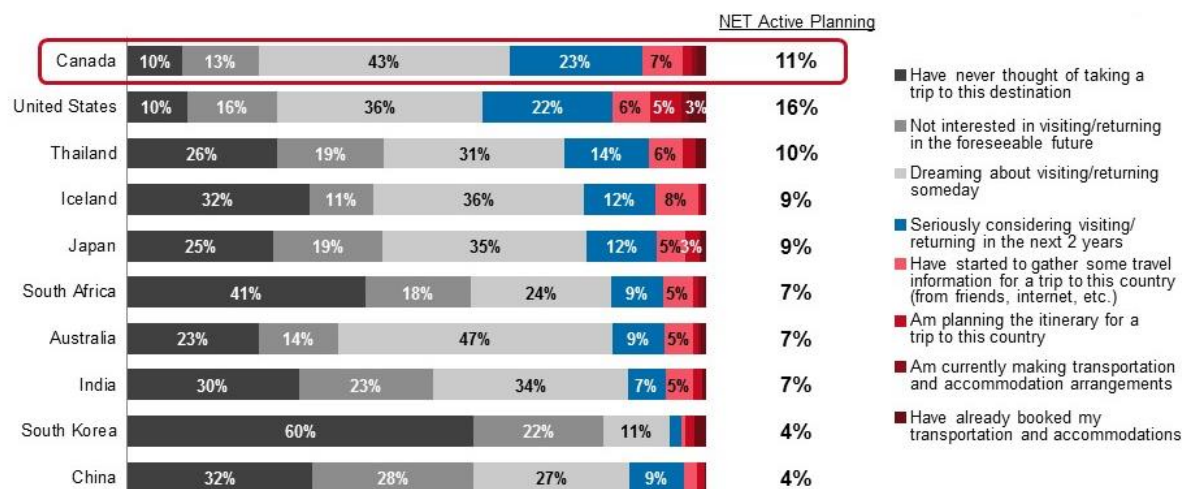
Figure 4.2: DC's Path-to-Purchase Model

Unaware	Have never thought of taking a trip to this destination	
Aware	Not interested in visiting/returning in the foreseeable future	
On Dream List	Dreaming about visiting/returning someday] Dream to Purchase
On Consideration List	Seriously considering visiting/returning in the next 2 years	
Creating a Vacation Movie	Have started to gather some travel information for a trip to this destination] Consider to Purchase
Detailed Itinerary Planning	Am planning the itinerary for a trip to this destination	
Finalizing Travel Arrangements	Am currently making transportation and accommodation arrangements] Active Planning
Booking a Trip	Have already booked my transportation and accommodations	

In looking at results for France, the US is in the lead with 16% of French long-haul travellers actively engaged in planning a visit to the country. By comparison, 11% are actively planning a trip to Canada, which is only marginally ahead of Thailand (10%), Iceland (9%), and Japan (9%). Once again, results may be impacted by the timing of data collection in 2016 (respondents may be thinking of winter trips). For this reason, 2016 results should not be compared with previous years.

Slightly more encouraging for Canada is an additional 23% are seriously considering a visit, compared to 22% for the US and 14% for Thailand. Australia and Canada lead the pack with large portions of the potential market in the dream phase. Younger travellers aged 18-34 are overrepresented in the seriously considering Canada stage, while travellers aged 35-54 are overrepresented in the dreaming phase and older travellers aged 55+ are overrepresented in the never thought of visiting group. Increasing the urgency to visit Canada among younger travellers is key.

Figure 4.3: Stage in the Purchase Cycle by Country



Base: Long-haul pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected countries from the competitive set (n=varies)
 QMP1. Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

Getting travellers to move through the purchase cycle to booking a trip is critical. The charts below show Canada’s progress converting travellers at crucial steps in the purchase cycle relative to top competitors (determined by past 3-year visitation) and other destinations in the competitive set. For reference, also shown is the average across the entire competitive set. ‘Strong’ and ‘weak’ conversion ratios were derived through statistical analysis, specifically if a conversion ratio is greater than one standard deviation from the average, then it is considered ‘strong’ and if a conversion ratio is lower than one standard deviation from the average, then it is marked as ‘weak’.

At the dreaming stage, Canada’s performance is average as are all the other top competitors. The US excels at converting travellers from dreaming to the consideration stage. As noted earlier, Canada has a disproportionate number of travellers aged 35-54 in the dreaming stage.

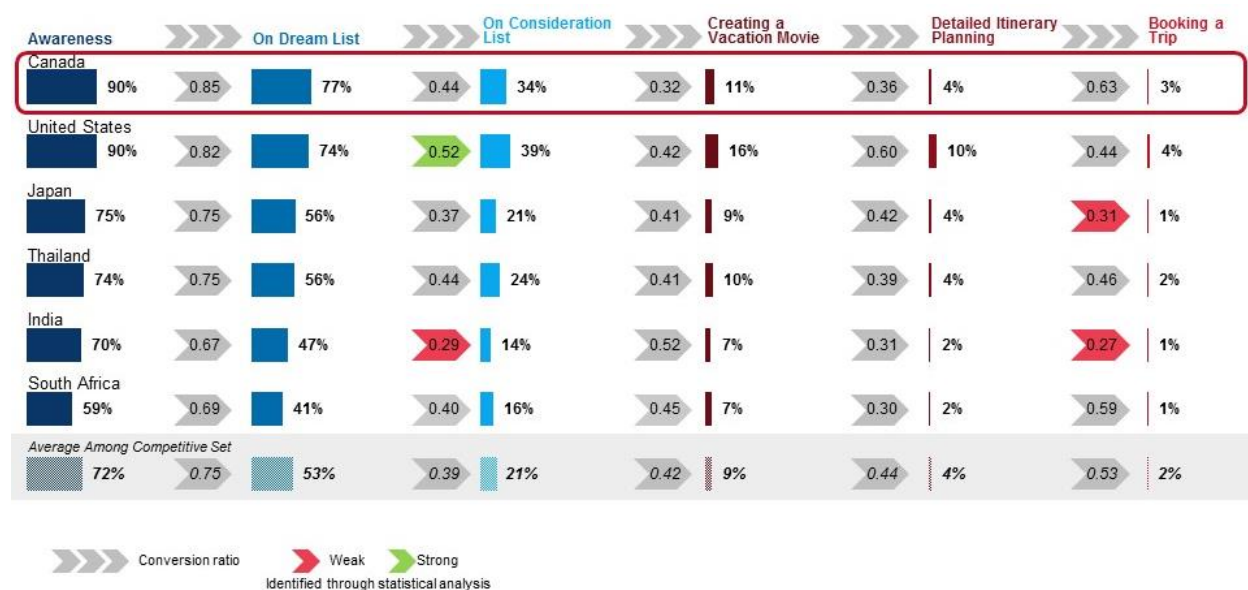
Canada’s performance continues to be average at the creating a vacation movie stage, along with all other destinations in the competitive set. Since this stage is focussed on information gathering, ensuring prospective visitors can find the information they seek is paramount. The key to helping prospective visitors move further along in the purchase cycle is to provide information which presents a full picture of what a trip to Canada could look like e.g., a focal point to anchor a trip or itinerary suggestions.

At the final stage, booking a trip, Canada has converted 3% of French travellers into actual visitors, lagging slightly behind the US (4% conversion), but ahead of other primary competitors, most notably, Japan (1% conversion).

For context, the US recorded 1.63 million arrivals from France in 2016, while Thailand saw 739,000, Canada welcomed 546,000 and Japan logged 253,000.³

³ Destination Canada, US National Travel & Tourism Office, Japan National Tourism Organization, Department of Tourism Thailand.

Figure 4.4: Path-to-Purchase Conversion – Top Competitors

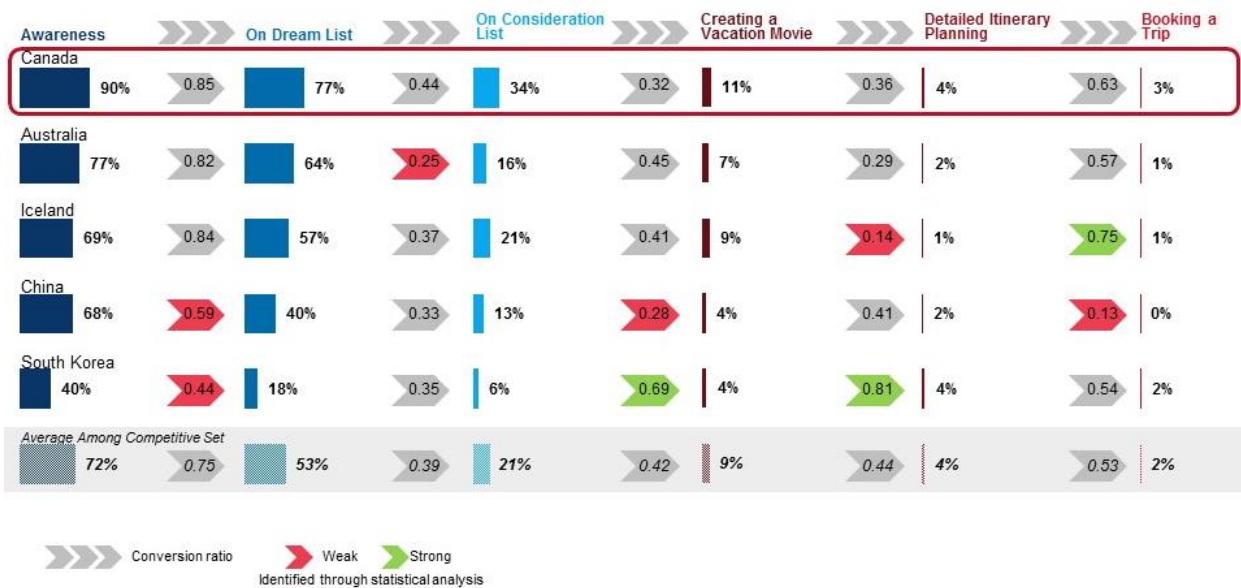


Examining purchase cycle results for destinations visited less frequently by French travellers is also informative. Most notably, Iceland is a top performer at the final stage, seeing conversion ratios between detailed itinerary planning and actual booking well above average. However, Iceland does see a weakness in conversion between the vacation movie and detailed itinerary planning stages, which might suggest that those who actually make it to the planning stage for a trip to Iceland are more committed to actually travelling there.

While examining what Iceland is doing to convince French travellers to move from planning to booking is worthwhile, it is important to keep in mind the proportion booking is lower than Canada's result. Further, the relative size of the market is also important to keep in mind with Iceland attracting 85,000 French visitors in 2016⁴.

⁴ Icelandic Tourist Board.

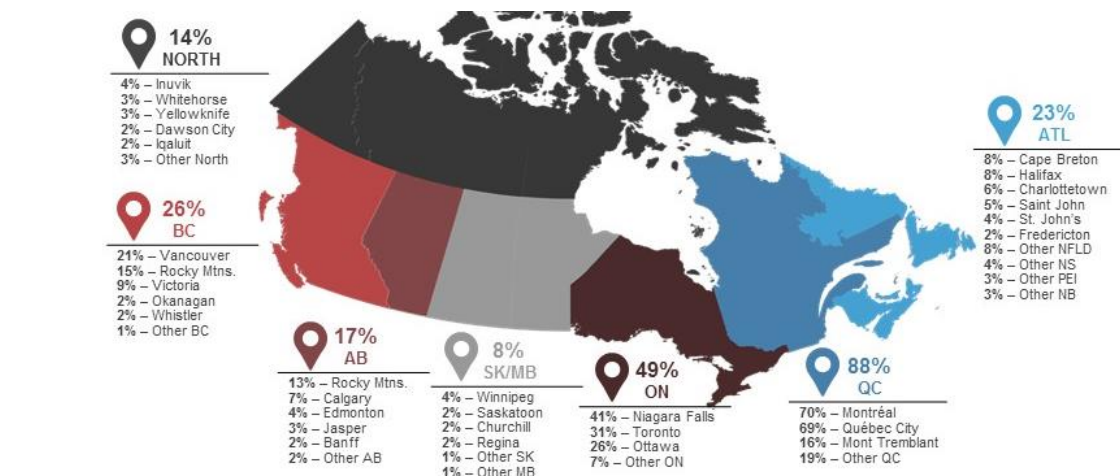
Figure 4.5: Path-to-Purchase Conversion – Rest of Competitors



Destinations

French travellers in the dream-to-purchase stages and indicating they are definitely/very likely to visit Canada in the next 2 years were asked which parts of the country they would likely visit. Quebec is the most popular province by a wide margin (cited by 88%), with Montreal (70%) and Quebec City (69%) vying for top spot. Ontario is mentioned considerably less often (49%), with Niagara Falls (41%) and Toronto (31%) being the primary draws. British Columbia (26%) and Atlantic Canada (23%) are the next most popular provinces for French travellers.

Figure 4.6: Canadian Destinations Likely to Visit (Among those definitely/very likely to visit)



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=566)
 QMP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?
 QMP7a-g. Within [province/region], which travel destinations are you likely to visit?

An additional question asked potential visitors to identify the one Canadian destination holding the greatest appeal. French travellers are clearly drawn to Canada’s French speaking cities, with Montreal (28%) and Quebec City (27%) ahead by a large margin. Niagara Falls stands in 3rd place (14%), suggesting that some French travellers might be interested in combining a trip to Quebec with landscape-based icons in relatively close proximity. There is an opportunity to use Montreal and Quebec City as anchors and highlight their proximity to lesser known destinations to attract French travellers.

Figure 4.7: Most Appealing Canadian Destination – Top 10 Mentions



5. Vacation Activities

French travellers were asked about which activities and experiences they seek while on holidays in general, regardless of the destination. Exploring aboriginal culture, traditions or history is the most sought-after holiday experience, followed closely by hiking or walking in nature, seeing natural attractions such as mountains and waterfalls, and sampling local cuisine and drink. Apart from Northern lights, fine dining, and viewing wildlife or marine life, which holds appeal for all age groups, the top activities all hold stronger than average appeal for older travellers aged 55+.

These results bode well for Canada, which can offer the full range of cultural and outdoor experiences French travellers say they seek.

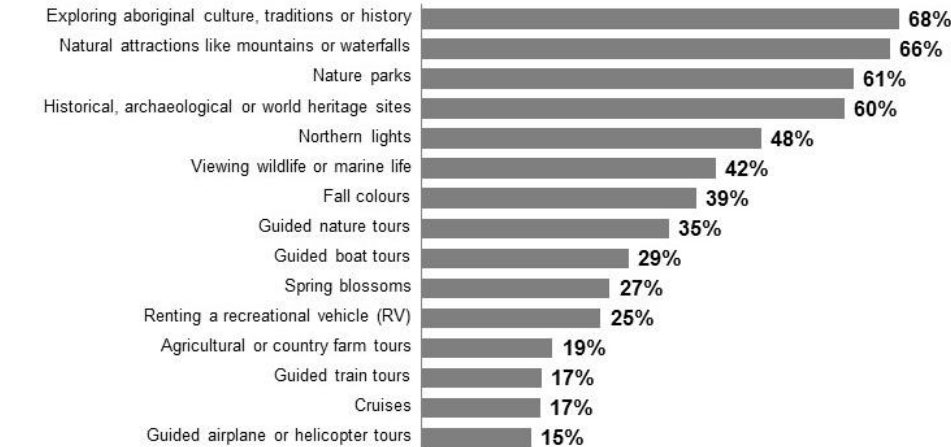
Figure 5.1: General Activities/Places Interested In – Top 10



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501)
 QMP10. In general, what activities or places are you interested in while on holiday?

In terms of things to see & do, French travellers are most interested in exploring aboriginal culture, traditions or history (68%) and viewing natural attractions like mountains or waterfalls (66%). They also show strong interest in visiting nature parks (61%) and historical, archaeological or world heritage sites (60%). Several of the activities are of more interest to those 55+ than those 18-54 years, including exploring aboriginal culture, traditions or history, hiking or walking in nature, natural attractions, trying local food and drink, and historical sites.

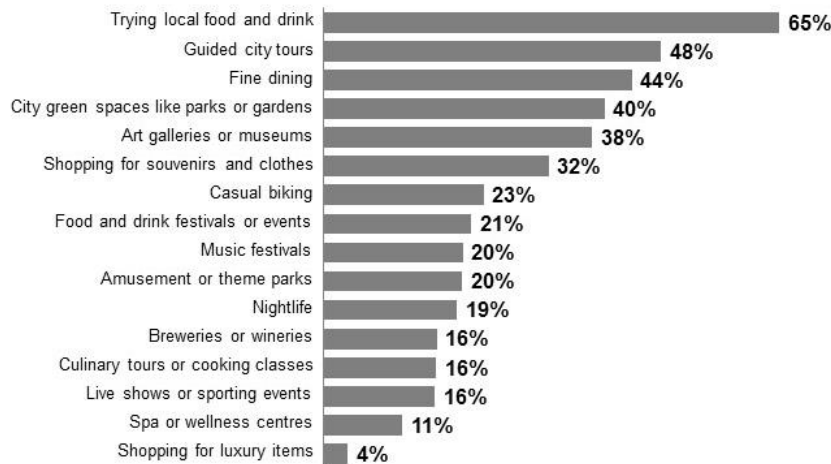
Figure 5.2: General Activities/Places Interested In – Things to See & Do



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501)
 QMP10. In general, what activities or places are you interested in while on holiday?

Among city activities specifically, trying local food and drink holds the greatest appeal by far for French travellers (65%). The next most frequently selected city activities are guided city tours (48%), fine dining (44%), and visiting city green spaces like parks and gardens (40%). Some city activities, such as local food and drink, guided city tours, and art galleries are of more interest to travellers aged 55+ while others are of more interest to younger travellers aged 18-34, such as city green spaces, shopping for souvenirs, casual biking, amusement parks, and nightlife.

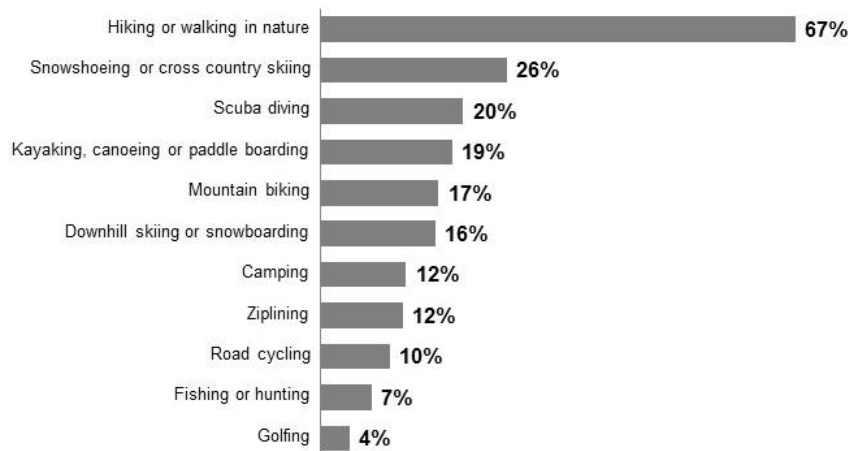
Figure 5.3: General Activities/Places Interested In – City Activities



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501)
QMP10. In general, what activities or places are you interested in while on holiday?

In terms of outdoor activities, French travellers are most interested in hiking or walking in nature (67%). The next most frequently cited outdoor activities are snowshoeing or cross country skiing (26%), scuba diving (20%), and kayaking, canoeing or paddle boarding (19%). Apart from hiking/walking in nature and golfing, travellers aged 55+ are less interested in outdoor activities while travellers aged 18-54 are most interested.

Figure 5.4: General Activities/Places Interested In – Outdoor Activities



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501)
QMP10. In general, what activities or places are you interested in while on holiday?

6. Barriers

All French long-haul travellers were asked what could prevent them from visiting Canada. Cost is the primary deterrent, cited more than twice as often as the next closest impediments – poor weather and the desire to visit other places. Travellers aged 18-54 and those with children living at home are most likely to mention cost. Younger travellers aged 18-34 are the most likely to say they don't have enough time to take a vacation.

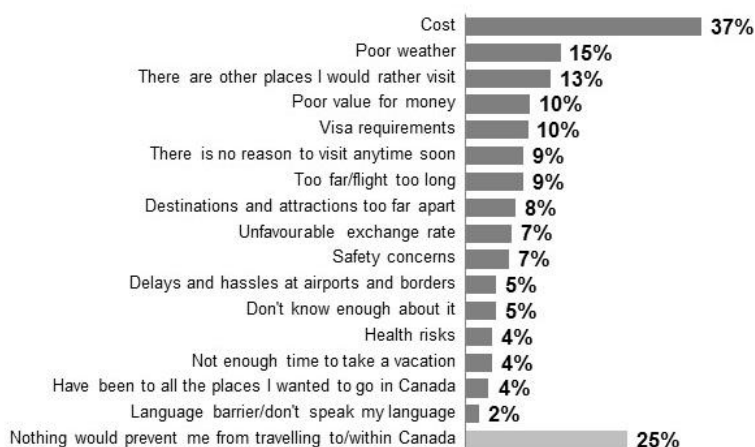
While the cost barrier is challenging to address, it can be indirectly dispelled through messaging about the value a Canadian trip offers and Canada's ability to deliver sought-after experiences. Secondary barriers such as the lack of compelling reasons to visit can also be addressed through advertising and marketing the key activities and drivers outlined above.

It is notable that even though there are no formal visa requirements for French citizens to enter Canada, respondents likely included the recently introduced Electronic Travel Authorization (eTA) as a proxy for the visa requirements response option. In fact, a similar pattern was observed in other markets where no visas are required for Canada. Although not explored in this survey given timing, the new eTA requirement is a potential barrier. Collaboration with key accounts in France could assist in identifying whether more clarity is needed about this new entry requirement.

Older travellers aged 55+ are the most likely to feel there is no reason to visit Canada anytime soon, but also the most likely to say there is nothing to prevent them from visiting. From a lifetime value standpoint, younger travellers may require more efforts to attract, but the pay-off can be greater. Attracting younger travellers will take more effort as travellers need to be informed about what Canada has to offer. From a strategic marketing viewpoint, Destination Canada could consider focusing branding awareness efforts on younger travellers and split tactical efforts in collaboration with partners between the younger and older generation.

While cost remains the top barrier among those who visited Canada in the past (30%), they are less likely to cite it as a barrier compared to those who have never been (41%). This means that French travellers who have never been to Canada could be persuaded to visit if they are convinced of the value that a Canadian holiday has to offer.

Figure 6.1: Key Barriers for Visiting Canada

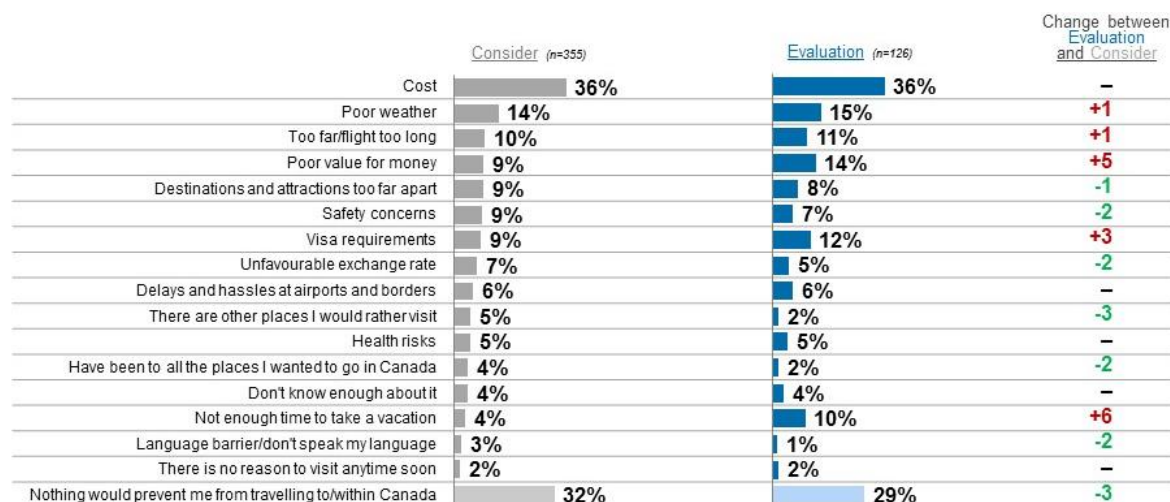


Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501)
 QMP9. Which of the following factors might discourage you from visiting Canada?

Examining barriers at key path-to-purchase stages provides additional insight. For those considering a visit, cost is the acute barrier, followed by weather concerns, and flight length. The increasing availability of direct flights to Canada (+5 over 2015)⁵ may help dispel this concern.

Those at the evaluation stage (gathering information or planning a visit) also cite cost and weather as primary barriers. However, value for money concerns (+5) and visa requirements (+3) intensify as do concerns about available vacation time (+6).

Figure 6.2: Key Barriers for Visiting Canada – by Path-to-Purchase Segments



Base: Long-haul pleasure travellers in specific path-to-purchase segments
 QMP9. Which of the following factors might discourage you from visiting Canada?

⁵ Destination Canada, Tourism Snapshot, December 2016.

7. Recent Trip Profile

The following section provides details on the most recent long-haul trip taken by French travellers to competitive set destinations in the past 3 years (55% took such a trip). If the most recent trip encompassed more than one destination, the data reflects where the most time was spent.

Trip Purpose

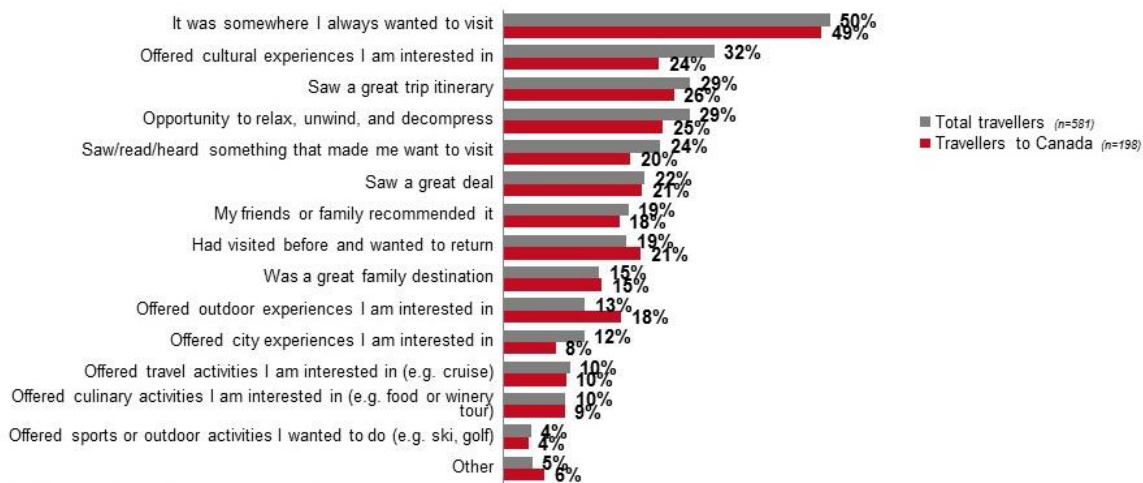
The primary reason for travelling among all French long-haul travellers was for holiday purposes (cited by 72% of all travellers). In Canada's case, 65% cited holiday as the primary purpose, but a disproportionate number (20%) mentioned visiting friends and relatives as their primary purpose, underscoring the importance of VFR (Visiting Friends and Relatives) as a reason for French travellers to visit Canada.

Motivators

Those travelling for holiday purposes were asked about factors which influenced their choice of destination.

A longstanding desire to visit was by far the primary reason for choosing the destination, both among travellers generally and visitors to Canada. Less important to French travellers, but in second place are the cultural experiences offered by the destination. However, cultural experiences were relatively less important as a motivation to choose Canada. Also of note, those who visited Canada were more likely than travellers overall to cite outdoor experiences as an important factor in their choice of destination (18% versus 13% overall).

Figure 7.1: Factors Influencing Destination Selection



Base: Long-haul pleasure travellers (past 3 years) travelling for holiday
 QRT3. Which of the following factored into your choice of destination for this trip?

Travel Party

Regardless of destination, French travellers were most likely to be accompanied by their spouse (64%). This is particularly common among travellers aged 35+. Fifteen percent of French travellers went with friends (least common among travellers aged 35-54), while 12% travelled alone (most common among travellers aged 35-54) and 11% travelled with at least one child under the age of 18 (most common among travellers aged 35-54). Younger travellers aged 18-34 were the most likely group to have travelled with their parents or other family members.

Booking

Thirty-one percent of French travellers book flights directly with the airline, followed by travel agents (29%) and online travel agencies (26%). Those who visited Canada recently were slightly more likely to use travel agents (33%) than booking either directly with the airline (29%) or via online booking options (26%). In addition, older travellers aged 55+ are more likely to use travel agents.

For accommodation, booking directly with a travel agent (22%) is on par with both booking via an online travel agency (21%) and booking directly with the provider (21%). Those who visited Canada were only slightly more likely to have booked with a travel agent (21%) than either directly with the provider (19%) or through an online travel agency (17%). Travellers aged 35-54 were most likely to use an online travel agency.

Type of Accommodation

Regardless of destination, French travellers show a preference for mid-priced hotels (42%) followed by budget (21%) and luxury (21%) hotels. Recent visitors to Canada were also most likely to opt for a mid-price hotel (44%), but were more likely to choose a budget hotel (22%), bed & breakfast (22%), or rental apartment (19%) over a luxury hotel (12%). Owing to the greater prevalence of VFR travel, it is not surprising that visitors to Canada were more likely to stay with friends and family (12%) than visitors to other destinations (8%).

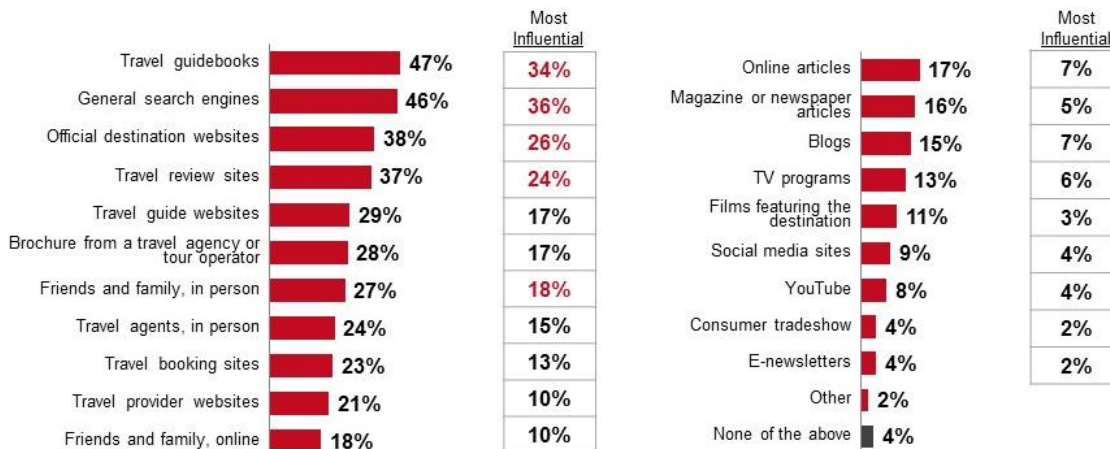
8. Marketing Tactics

Sources Used to Look for Information

French long-haul travellers rely heavily on travel guidebooks (47%) and general search engines (46%) for finding information on potential vacation destinations. Three out of five of the most popular information sources used by French long-haul travellers are online sources, including general search engines, official destination websites, and travel review sites.

General search engines were deemed the most influential information source by the largest number of French long-haul travellers (36%), followed by travel guidebooks (34%), official destination websites (26%), travel review sites (24%), and personal interactions with friends and family (18%). Given the continued high usage and strong influence of travel guidebooks, ensuring these have content which meets the needs of all travellers is important.

Figure 8.1: General Source of Destination Information / Most Influential Source



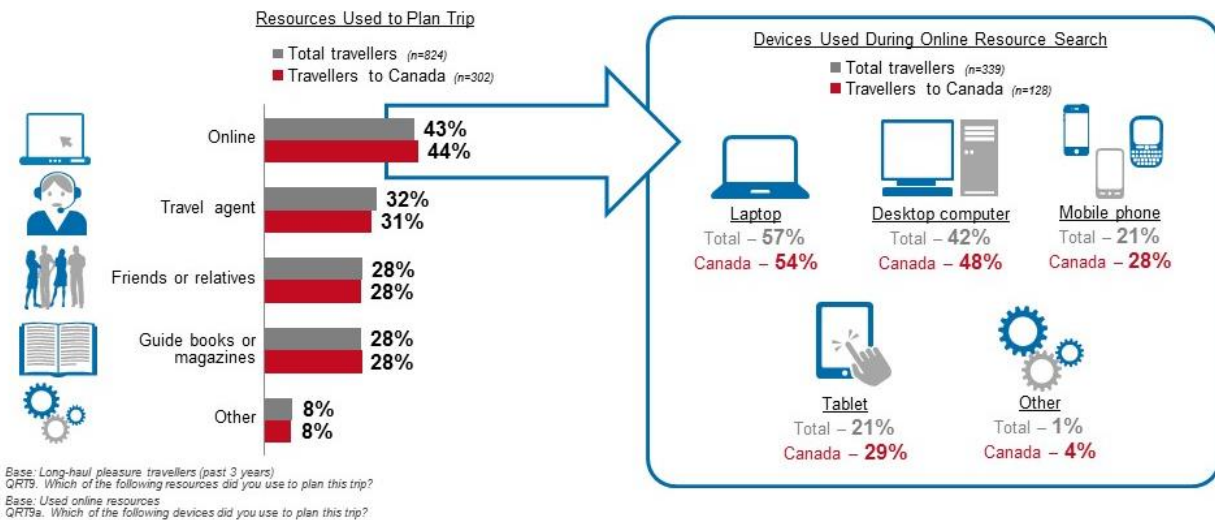
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1,501)
 QMT1. When you research possible vacation destinations for your next trip, what sources do you use to look for information?
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) who mentioned an information source (n=1,445)
 QMT2. Please select the 3 most influential information sources.

Resources, Devices Used to Plan Recent Trip

As noted above, French long-haul travellers rely fairly heavily on online resources to plan vacations, with laptops and desktops being most used devices. Despite the prevalence of mobile phones in France, they are used less commonly for travel planning (used by 21% of travellers).

Travel agents were cited as a resource for planning 32% of trips, followed by friends and family (28%) and guidebooks or magazines (28%). The same pattern is seen among those who travelled to Canada. Online resources are used more often among travellers aged 18-54, while older travellers aged 55+ are among the most likely to consult a travel agent.

Figure 8.2: Resources and Devices Used to Plan Trip



9. Destination Canada's French Target

Destination Canada has identified a more defined target for marketing efforts in France. Analysis and findings on this target are available to Destination Canada's marketing partners; for more information, please contact Destination Canada to become a marketing partner.