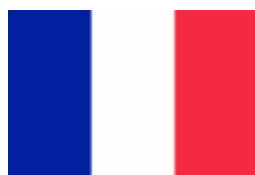


France Consumer and Travel Trade Research

Final Report



February, 2008

Table of Contents

FOREWORD.....	V
BACKGROUND	VI
RESEARCH OBJECTIVES	IX
METHODOLOGY	XIV
KEY FINDINGS.....	1
SWOT ANALYSIS.....	24
THE WAY FORWARD: CONSIDERATIONS.....	29
FINDINGS IN DETAIL	43
TRAVEL TRENDS	44
Section 1: French Economic Outlook	45
Section 2: Outbound Travel Trends.....	50
CONSUMER SURVEYS – QUALITATIVE AND QUANTITATIVE ANALYSES	55
Section 3: Destination Motivators	56
Section 4: Destination Trip Profile.....	85
Section 5: Market Segmentation	107
Section 6: Traveller Profile	121
Section 7: The Canadian Opportunity.....	126
Section 8: The Buy Cycle Model.....	134
Section 9: Regional Opportunities.....	147
Section 10: Claimed Barriers to Canada Travel.....	166
Section 11: Media	168
Section 12: Trip Planning.....	175
Section 13: Environmentally Responsible Destination	180
Section 14: Consumer Product Idea Forums.....	184
Section 15: The Travel Trade	212
APPENDIX.....	241

List of Exhibits

FOREWORD EXHIBIT 1: FRENCH LONG-HAUL TRIPS, 2000 TO 2006	VI
FOREWORD EXHIBIT 2: CANADIAN ARRIVALS FROM FRANCE, 2000 TO 2006	VI
KEY FINDINGS EXHIBIT 1: TRIPS ARRIVING IN CANADA FROM FOREIGN MARKETS 2006	2
KEY FINDINGS EXHIBIT 2: FRENCH TRIPS ARRIVING IN CANADA 2000-2006	3
KEY FINDINGS EXHIBIT 3: LONG-HAUL COUNTRIES VISITED MOST RECENTLY.....	4
KEY FINDINGS EXHIBIT 4: PERCEPTUAL BRAND/ATTRIBUTE MAP.....	8
KEY FINDINGS EXHIBIT 5: CANADA'S STRENGTHS AND WEAKNESS VS. COMPETITORS.....	9
KEY FINDINGS EXHIBIT 6: THE BUY CYCLE MODEL – HOW IT WORKS.....	11
KEY FINDINGS EXHIBIT 7: THE BUY CYCLE MODEL – BOTTLENECKS AND BARRIERS - CANADA.....	12
KEY FINDINGS EXHIBIT 8: THE BUY CYCLE MODEL – PROJECTED MARKET SIZE	13
KEY FINDINGS EXHIBIT 9: IDEAL CANADIAN VACATION – BY TARGET SEGMENT	17
KEY FINDINGS EXHIBIT 10: CANADA'S CURRENT VISITORS' PROFILE	22
KEY FINDINGS EXHIBIT 11: BUY CYCLE MODEL – EUROPEAN MARKETS	36
EXHIBIT SECTION 1-1: FRENCH POPULATION BY AGE - 2000 TO 2006	47
EXHIBIT SECTION 1-2: EURO EXCHANGE RATES 2000 TO 2006.....	48
EXHIBIT SECTION 1-3: FRENCH ECONOMIC INDICATORS TRENDS.....	49
EXHIBIT SECTION 2-1: FRANCE LONG-HAUL MARKET TRENDS	51
EXHIBIT SECTION 2-2: FRENCH LONG-HAUL TRIPS --- 2000 TO 2006.....	52
EXHIBIT SECTION 2-3: DESTINATION CHANGES 2000 VS. 2006	53
EXHIBIT SECTION 2-4: FRENCH TRIPS ARRIVING IN CANADA 2000 TO 2006.....	54
EXHIBIT SECTION 3-1: ALL COUNTRIES VISITED IN PAST 3 YEARS BY LONG-HAUL TRAVELLERS.....	57
EXHIBIT SECTION 3-2: LONG-HAUL COUNTRIES VISITED MOST RECENTLY	58
EXHIBIT SECTION 3-3: DESTINATION TRENDS – MOST RECENT TRIPS	59
EXHIBIT SECTION 3-4: ALL REASONS FOR TRAVEL – BY ALL DESTINATIONS	70
EXHIBIT SECTION 3-5: ALL REASONS FOR TRAVEL – BY DESTINATION	71
EXHIBIT SECTION 3-6: MAIN PURPOSE OF TRIP – BY ALL DESTINATIONS	72
EXHIBIT SECTION 3-7: MAIN PURPOSE OF TRIP – BY DESTINATION	73
EXHIBIT SECTION 3-8: ACTIVITIES PARTICIPATED ON TRIP – CULTURALLY ORIENTED – BY ALL DESTINATIONS.....	74
EXHIBIT SECTION 3-9: ACTIVITIES PARTICIPATED ON TRIP – NATURE ORIENTED – BY ALL DESTINATIONS	75
EXHIBIT SECTION 3-10: ACTIVITIES PARTICIPATED ON TRIP – CULTURALLY ORIENTED – BY DESTINATION....	76
EXHIBIT SECTION 3-11: ACTIVITIES PARTICIPATED ON TRIP – NATURE ORIENTED – BY DESTINATION	77
EXHIBIT SECTION 3-12: IMPORTANCE OF ATTRIBUTE IN DESTINATION SELECTION – BY ALL DESTINATIONS....	78
EXHIBIT SECTION 3-13: CANADA'S STRENGTHS AND WEAKNESSES VS. COMPETITORS	79
EXHIBIT SECTION 3-14: DESTINATION RATING	80
EXHIBIT SECTION 3-15: BRAND ATTRIBUTE MAP	82
EXHIBIT SECTION 4-1: NUMBER OF NIGHTS AWAY FROM HOME – BY ALL DESTINATIONS	86
EXHIBIT SECTION 4-2: NUMBER OF NIGHTS AWAY FROM HOME – BY DESTINATION	87
EXHIBIT SECTION 4-3: MONTH OF TRAVEL – BY ALL DESTINATIONS	88
EXHIBIT SECTION 4-4: MONTH OF TRAVEL – BY DESTINATION	89
EXHIBIT SECTION 4-5: PARTY SIZE AND COMPOSITION – BY ALL DESTINATIONS	90
EXHIBIT SECTION 4-6: PARTY SIZE AND COMPOSITION – BY DESTINATION	91
EXHIBIT SECTION 4-7: FIT VS. GROUP TRAVEL – BY ALL DESTINATIONS.....	92
EXHIBIT SECTION 4-8: FIT VS. GROUP – BY DESTINATION.....	93
EXHIBIT SECTION 4-9: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION – BY ALL DESTINATIONS	94
EXHIBIT SECTION 4-10: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION – BY DESTINATION	95
EXHIBIT SECTION 4-11: FIT CAR RENTAL.....	96
EXHIBIT SECTION 4-12: FIT TRIP COMPONENTS BOOKED BEFORE DEPARTURE VS. DURING TRIP.....	97

EXHIBIT SECTION 4-13: FIT TRIP COMPONENT BOOKED BEFORE DEPARTURE VS. DURING TRIP – BY DESTINATION	98
EXHIBIT SECTION 4-14: TYPE OF ACCOMMODATION – BY ALL DESTINATIONS	100
EXHIBIT SECTION 4-15: TYPE OF ACCOMMODATION – BY DESTINATION	101
EXHIBIT SECTION 4-16: TRIP EXPENDITURE – BY ALL DESTINATIONS	102
EXHIBIT SECTION 4-17: TRIP EXPENDITURE – BY DESTINATION	103
EXHIBIT SECTION 4-18: VALUE FOR MONEY	104
EXHIBIT SECTION 4-19: LIKELIHOOD TO RECOMMEND DESTINATION TO OTHERS	105
EXHIBIT SECTION 4-20: INCIDENCE/DURATION OF VISIT IN CANADA/U.S.	106
EXHIBIT SECTION 5-1: SIZE OF MARKET SEGMENT	108
EXHIBIT SECTION 5-2: SEGMENT CHARACTERISTICS	110
EXHIBIT SECTION 5-3: CURRENT PLANS TO VISIT CANADA – BY SEGMENT	113
EXHIBIT SECTION 5-4: IDEAL TRIP TO CANADA – BY SEGMENT	116
EXHIBIT SECTION 5-5: SEGMENT MAPPING.....	120
EXHIBIT SECTION 6-1: NUMBER OF TRIPS TAKEN IN PAST 3 YEARS.....	122
EXHIBIT SECTION 6-2: FRENCH LONG-HAUL MARKET PROFILE	123
EXHIBIT SECTION 7-1: LONG-HAUL DESTINATION PRIORITY	127
EXHIBIT SECTION 7-2: CANADA'S PRIORITY RANKING KEY SEGMENT	128
EXHIBIT SECTION 7-3: IDEAL TRIP TO CANADA – BY PROSPECTIVE MARKET	130
EXHIBIT SECTION 8-1: THE BUY CYCLE MODEL – HOW IT WORKS.....	136
EXHIBIT SECTION 8-2: THE BUY CYCLE MODEL – BOTTLENECKS AND BARRIERS - CANADA.....	143
EXHIBIT SECTION 8-3: THE BUY CYCLE MODEL – PROJECTED MARKET SIZE	144
EXHIBIT SECTION 9-1: PLACES VISITED IN CANADA	148
EXHIBIT SECTION 9-2: NUMBER OF NIGHTS SPENT IN EACH PROVINCE	149
EXHIBIT SECTION 9-3: TRIP CHARACTERISTICS – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP	152
EXHIBIT SECTION 9-4: ACTIVITIES PARTICIPATED IN – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP	156
EXHIBIT SECTION 9-5: TRAVEL PARTY – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CANADIAN TRIPS	159
EXHIBIT SECTION 9-6: TRIP PLANNING – AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CAR TRIP	162
EXHIBIT SECTION 9-7: PROFILE OF THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIPS.....	164
EXHIBIT SECTION 10-1: MAJOR BARRIERS TO CANADA TRAVEL.....	167
EXHIBIT SECTION 11-1: ALL SOURCE OF INSPIRATION – BY ALL DESTINATIONS	169
EXHIBIT SECTION 11-2: ALL SOURCE OF INSPIRATION – BY DESTINATION	170
EXHIBIT SECTION 11-3: PRIMARY SOURCE OF INSPIRATION – BY ALL DESTINATIONS	171
EXHIBIT SECTION 11-4: PRIMARY SOURCE OF INSPIRATION – BY DESTINATION.....	172
EXHIBIT SECTION 11-5: SPECIFIC TV TRAVEL SHOW AND OTHER TV SHOWS USED	173
EXHIBIT SECTION 11-6: SPECIFIC WEBSITES USED	174
EXHIBIT SECTION 12-1: TRIP PLANNING/BOOKING LEADTIME – BY ALL DESTINATIONS.....	176
EXHIBIT SECTION 12-2: TRIP PLANNING/BOOKING LEADTIME – BY DESTINATION	177
EXHIBIT SECTION 12-3: HOW TRIP WAS BOOKED – BY ALL DESTINATIONS	178
EXHIBIT SECTION 12-4: HOW TRIP WAS BOOKED – BY DESTINATION	179
EXHIBIT SECTION 13-1: LONG-HAUL TRAVELLER'S ENVIRONMENTAL INVOLVEMENT.....	181
EXHIBIT SECTION 13-2: IMPORTANCE OF DESTINATION'S RECORD ON ENVIRONMENT WHEN CHOOSING TRAVEL DESTINATION	182
EXHIBIT SECTION 13-3: DESTINATION RATING ON BEING ENVIRONMENTALLY RESPONSIBLE	183

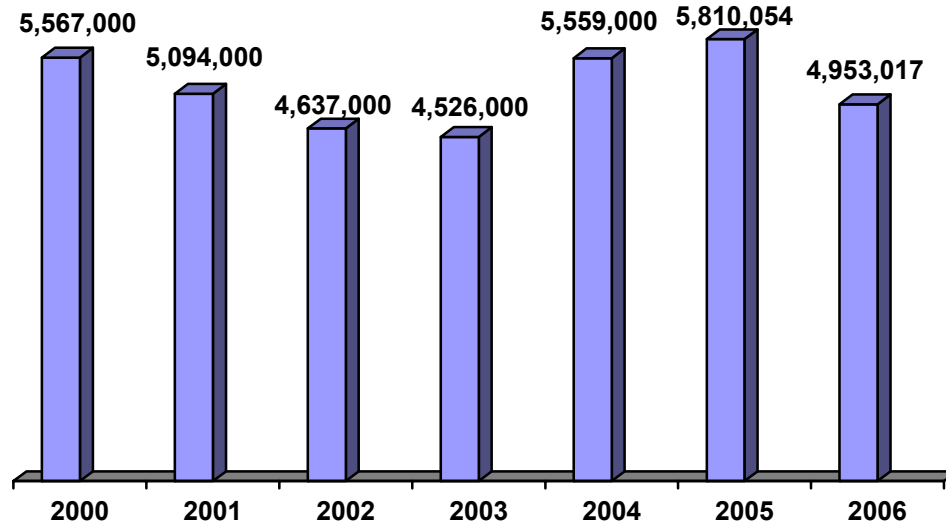
Foreword

Background

Between 2000 and 2006, long-haul trips out of France decreased by 11%, although it did peak in 2005 before falling back again.

However, France is still a healthy outbound market, and even at its low point in 2003 it generated 4.5 million long-haul trips.

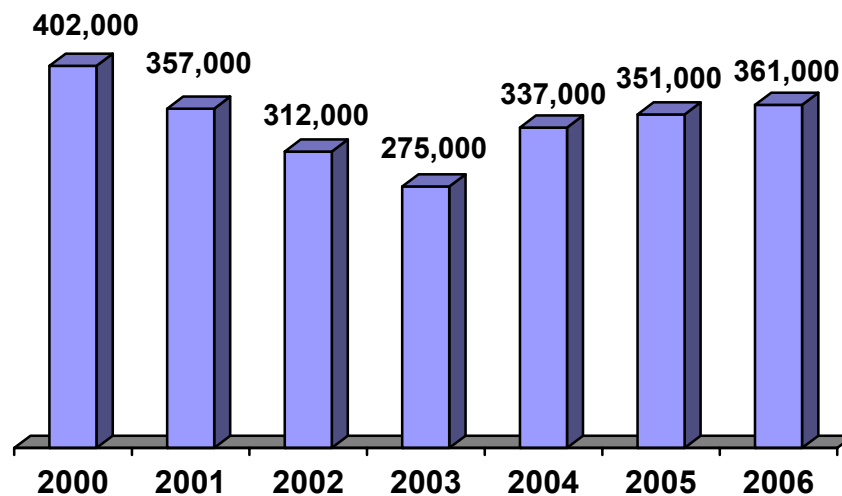
FOREWORD EXHIBIT 1: FRENCH LONG-HAUL TRIPS, 2000 TO 2006



Source: EuroStat

Although still off from its high in 2000, French arrivals in Canada are moving up from their low point in 2003

FOREWORD EXHIBIT 2: FRENCH TRIPS ARRIVING IN CANADA, 2000 TO 2006



Source: Statistics Canada



Background

The research was designed to meet 6 business goals of the Canadian Tourism Commission (CTC), Tourism British Columbia, Ontario Tourism Marketing Partnership, Alberta Tourism, Parks, Recreation and Culture, and Atlantic Canada Opportunities Agency (hereinafter the “Partners”).

This research must determine:

- ♦ What is causing the slide in travel to Canada
- ♦ What are the issues retarding growth
- ♦ How they need to be addressed
- ♦ What strategic action the Partners must take in order to steer the decline and capitalize on the enormous latent demand.

Failure to respond quickly and effectively to the decline in tourism could result in continued deterioration in visitors to Canada and ultimately undermine the Partners’ ROI.

The specific business goals, can be summarized as follows:

1. To understand **why** tourism to Canada has not grown faster.
 - a. Is it an awareness issue, an attitudinal issue or both?
 - b. Are sentiments toward other destinations at play (including the U.S.)?
2. To design the **most effective advertising and marketing communication** to reach the potential markets.
 - What are the triggers stimulating travel to Canada – current and potential?
 - How can they best be integrated into Canadian travel advertising?
 - From a media planning perspective, the ideal timing (season and lead time)?

Background

3. To make use of the most effective **communication channels** to reach the target market.
 - The internet
 - Advertising vehicles
 - Trade – agents/wholesalers
 - Other channels
4. To provide direction and **assistance for the travel trade** to accelerate the growth of pleasure travel to Canada.
5. To identify the **target segments** for travel to Canada.
 - Motivational/product segments
 - Demographic segments
6. To create market-sensitive **product packages**.
 - Most appropriate activity/interest focus
 - Most effective price points
 - Best packaging components (the correct type of accommodation, duration, ground activities, etc)

Research Objectives

The research was focussed on 8 primary areas:

a) Defining the Target Market

- ♦ Insignia successfully generated product/motivational segments in Japan, South Korea, Australia and India some of which became prime targets, yet cut across the age spectrum. The same successful methodology was applied to the French market.
- ♦ Aside from general target segments, there may be important niche markets that specific provinces and/or territories should be going after.
- ♦ What is the size of the potential market for Canada overall and for each of the partners?

b) Global Segmentation

- ♦ How do travellers define or segment global destinations?
- ♦ Do they cluster destinations in a way that helps us understand the destination decision process?
- ♦ In Asia/Pacific, destinations are clustered by region – Asia, Europe, North America. Each region has an overall personality and that analysis helps to sort and clarify the multitude of individual global destinations that exist.
- ♦ What are the primary motivators to those regions? What kinds of people/trips do they attract?
- ♦ What activities/benefits are satisfied by each?
- ♦ What cultural factors figure into the equation?

Research Objectives

c) Pinpointing The Triggers For Canada

- ♦ What is unique about Canada?
- ♦ What appeals to prospects?
- ♦ What has successfully triggered past visitors?
- ♦ What kinds of vacations hold the best potential – again not only for Canada generally, but for each of the partners as well?
- ♦ Are these products FIT? Group? Can they be packaged? How should they be priced?

d) What Are The Barriers To Visiting Canada

- ♦ Are there lingering political, social and/or health concerns undermining travel to Canada?
- ♦ Is lack of awareness, knowledge, relevant product at play?
- ♦ Negative sentiment toward the U.S.?
- ♦ The real challenge here is determining how to unlock the incredible latent demand for Canada in the French market.
- ♦ The gulf that stands between that pinnacle and Canada's current visitor draw is immense and must be understood.
- ♦ In a later section Insignia explores in-depth the destination consideration process and elaborates on the best approach to clarifying the issues.



Research Objectives

e) Positioning Canada Effectively

- ♦ In a highly competitive marketplace Canada must be positioned effectively in order to strike a positive chord, a point of difference and to trigger an interest in travel.
- ♦ How should “Brand Canada” best be presented in the French market?
- ♦ What is the driving brand relationship that will cause consumers to have a vested interest?
- ♦ Future advertising depends on this analysis to be effective.

f) Product Opportunities

- ♦ It is essential to get down to the nuts and bolts of marketing and pinpoint the types of specific products or packages that should be in place to appeal to each European country and to each identified target market.
- ♦ Recent research by Insignia for the Partners in the U.K. and Germany revealed the significant differences in product needs by each market. For example, Germans are eager to immerse themselves in Canada’s outdoors and soft adventure. Brits are much happier with one foot out in nature and the other foot firmly planted in the security and familiarity of urban amenities and social interaction.
- ♦ Included in this analysis should be the perceptions of existing packages available to Canada – general knowledge, price, appropriateness.
- ♦ What can we learn from appealing competitive packages?

g) Planning/Booking Process

- ♦ The research must clarify:
 - ♦ Timing
 - ♦ Sources of inspiration for destination choices
 - ♦ Media influences
 - ♦ Information resources (including the internet)



- ♦ Booking process

Research Objectives

h) Travel Trade

- ♦ Both retailers and tour operators/wholesalers can have a profound influence in where people travel.
- ♦ It is essential that they are on side:
 - ♦ Bringing the right products to market
 - ♦ Promoting them effectively with backup knowledge
- ♦ The research must explore their awareness, perceptions, motivation and product lineup.
- ♦ How to get them up to speed and onside is essential.

Methodology

Phase One: Review of Existing Data

An examination of existing available data on France travel patterns and economics was conducted in order to provide context for the findings of the original research.

Information of particular relevance to the existing research included:

- Economic performance
- Consumer Confidence
- Disposable Income
- Long-haul trips, 2000 to 2006
- Destination patterns of long-haul travellers
- Domestic Travellers, 2000 to 2006
- Value of the Euro vs. the currencies of major destinations

Phase Two: France Long-haul traveller Focus Groups

In order to gather grassroots insights to shape the quantitative survey, as well as to give context to its results, focus groups were conducted among French travellers.

Six groups (recruit 8 for 6 per group) were conducted in Paris. All participants had either travelled internationally in the past 3 years or had plans to travel internationally in the next 2 years.

Four of the groups included those who had **not** yet travelled to Canada, but were not rejecters of Canada. These groups were split among gender and age, with two of the groups being male and the other two female, and two being younger (30 to 49) and two being older (50 to 69).

The two remaining groups were those who had visited Canada in the past 3 years. These groups were made up of a mix of males and females, but the groups were split by age, with one being younger (30 to 49) and one being older (50 to 69)

The discussion guide is included in the appendix of this report.

Methodology

	Paris		
	Male	Female	Mixed
Younger 30 - 49	Have not travelled to Canada	Have not travelled to Canada	Have travelled to Canada in past 3 years
Older 50 - 69	Have not travelled to Canada	Have not travelled to Canada	Have travelled to Canada in past 3 years

Phase Three: In-depth Interviews with the Travel Trade

As a great deal of the CTC's activities in France relate to the travel trade, a series of in depth interviews were conducted among the trade to gain a more complete picture of the travel market in France.

The interviews lasted, on average, between 30 and 45 minutes.

A discussion guide is included in the appendix of this report.

Fifteen interviews in total were conducted, with the following breakdown:

- 5 Interviews with Tour Operators/Wholesalers
- 6 Interviews with Travel Agents/Retailers
- 2 Interviews with Canadian representatives in France
- 2 Interviews with those working at airlines

In addition, 5 interviews were conducted with Canadian Receptives in Canada who deal with the France market.

Phase Four: Consumer Quantitative Survey

A national online panel operated by OpenVenue was conducted with 2,544 French long-haul travellers aged 18 and older from October 26 to November 15, 2007.

Methodology

Respondents met the following criteria:

- Travelled outside of European Union countries, North Africa and the Mediterranean for 3 nights or more with at least 1 night in paid accommodation for pleasure or personal reasons, to visit friends and relatives or a trip that combined business and pleasure in the past 3 years, or
- Planned to take a pleasure trip outside of European Union countries, North Africa and the Mediterranean for 3 nights or more with at least 1 night in paid accommodation in the next 2 years.

An oversample was implemented to reach n=719 past travellers to Canada.

This was achieved by screening both the main panel fully and a second sister panel for qualifying past Canadian travellers. The oversample of past travellers to Canada was then weighted down to the level in the cross-section survey.

The following chart shows regional destination of the 719 past travellers to Canada.

B.C.	n=122
Alberta	n=70
Saskatchewan	n=30
Manitoba	n=42
Ontario	n=416
Quebec	n=639
Atlantic	n=140
Yukon	n=38
Northwest Territories	n=60
Nunavut	n=34

The average duration of interview was 20 minutes. Detailed tables are available in a separate file. The questionnaire is appended for reference.

The average error range with a sample of 2,544 is $\pm 1.9\%$. This means that in 19 out of 20 cases, the results based on a sample of 2,544 will differ by no more than 1.9% from what would have been obtained by interviewing all consumers who meet the qualification criteria in the markets surveyed.

Methodology

Omnibus Survey

In addition to the online survey, a telephone omnibus survey was conducted among 1000 French adults aged 18+ across the nation to obtain incidence and profile data of the past and future pleasure trip travellers. This provided a base from which to weight the online survey as required.

In this case, an age weight was applied to the online sample to reflect a more accurate distribution of past/future travellers among each age group.

Phase Five: Regional Products Innovation Online Forums

Two 5-day forums (recruit 12 for 10 per forum) were conducted with past and prospective Canada travellers to evaluate specific tourism products from each partnered province.

All participants had either travelled internationally in the past 3 years or had plans to travel internationally in the next 2 years.

These groups were made up of a mix of males and females, age 30-69 with a mix of life stages (e.g., families with children 8 to 18 and households with no children).

One of the forums was among those who had visited Canada in the past 3 years, and claimed that their last trip to Canada was very enjoyable. All participants must not have stayed or spent more than 50% of their trip with friends or relatives. At least 2 participants must have visited B.C. or Alberta and 2 visited Ontario.

The other forum was with those who had **not** yet travelled to Canada, but are seriously planning to visit Canada in the next 2 years. They must be planning to stay in a paid accommodation for at least 50% of their trip and likely to spend at least half of their trip away from friends or relatives. At least 2 participants must be seriously considering visiting Western Canada (BC/Alberta/Saskatchewan/Manitoba) and 2 Ontario.

Results

The findings of the study are presented under four main headings:

- Key Findings
- Marketing Considerations
- Findings in Detail
- Appendix

Throughout the report, circles (= ↑) and squares (= ↓) have been used to highlight meaningful differences.

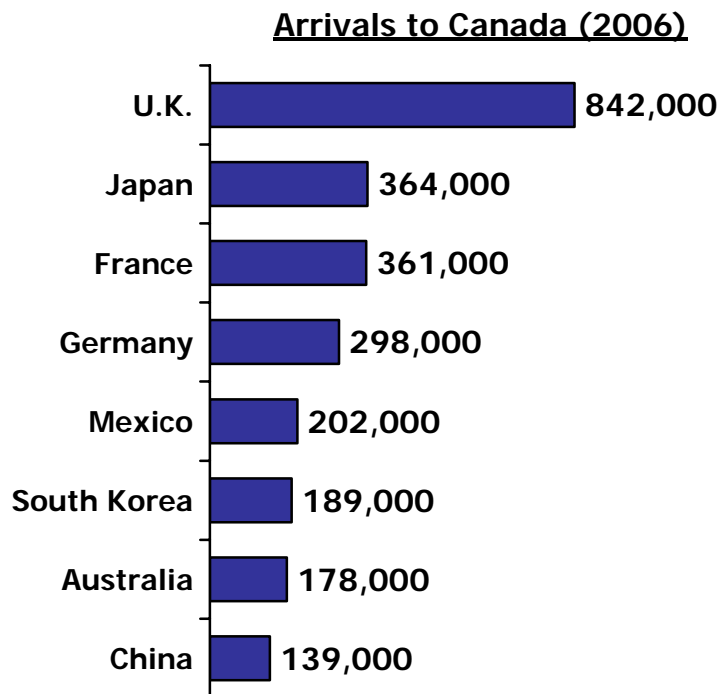
Key Findings

Key Findings

France a Key Market

France is the third most important market for Canada, among the CTC's target countries in terms of trips arriving in Canada.

KEY FINDINGS EXHIBIT 1: TRIPS ARRIVING IN CANADA FROM FOREIGN MARKETS 2006



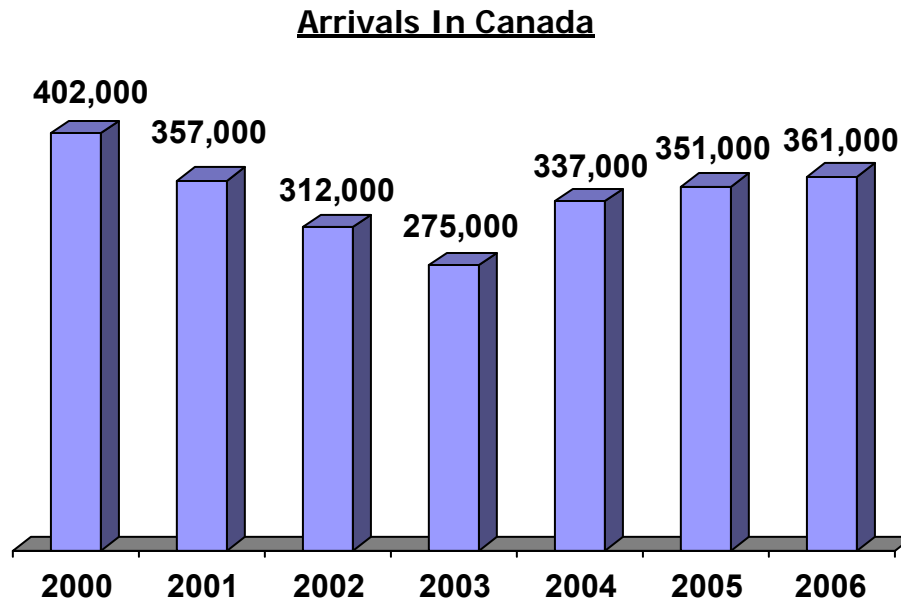
Source: Statistics Canada

Key Findings

Trends to Canada

Although still off from the high of 2000, French arrivals in Canada are moving up from their low point in 2003.

KEY FINDINGS EXHIBIT 2: FRENCH TRIPS ARRIVING IN CANADA 2000-2006



Source: Statistics Canada



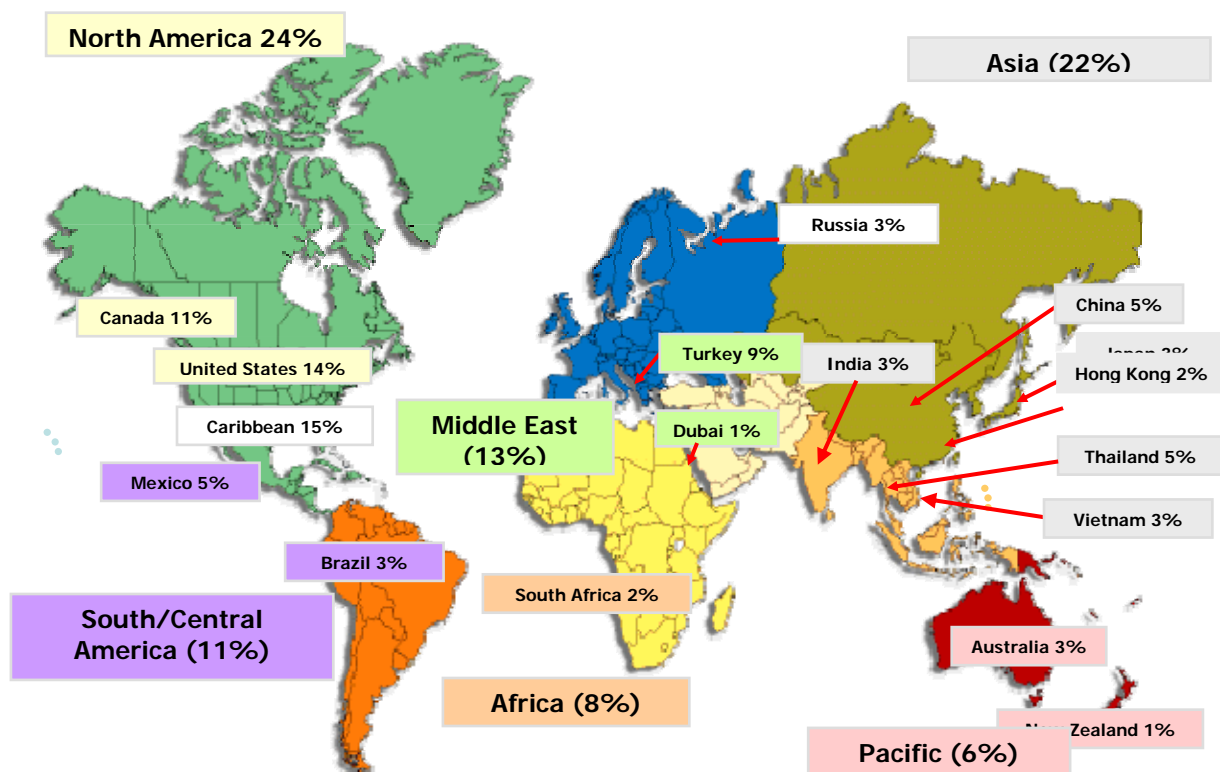
Key Findings

Canada in Perspective

Based on the most recent trip, Canada captures 11% of long-haul trips, just behind the US (at 14%).

Beyond North America, the French demonstrate an interest in traveling to a wide range of regions—from Asia (22%), to South/Central America (11%), the Caribbean (15%) and the Middle East (13%).

KEY FINDINGS EXHIBIT 3: LONG-HAUL COUNTRIES VISITED MOST RECENTLY



Key Findings

The Desired Canadian Experience

The French are great explorers and travel globally, but the number one destination on their dream list is Canada. As many as 22.0 million French long-haul travellers dream about visiting Canada.

So what is it that inspires them? There is no question that the key draw is to experience the French Canadian culture and way of life.

In their minds they have a very clear vision of a "simpler way of life", peaceful and calm", where people live "in communion with nature".

They imagine:

"Trapper's cabins"

"Story telling"

"Warm and welcoming French people"

"Speaking genuine French"

"They sing French, they don't speak it"

A perfect day in their minds would be:

"Get up early, have a 'woodcutter's breakfast' and set off to discover"

"Getting up really early and living the whole day at the pace of nature"

"Walking around in the woods, eating our meals with a trapper who would be teaching us about nature"

"Our ancestors came from France 350 years ago. Let us show you our country and our way of life"

Emotionally, it takes them back to their roots, a time of different values:

"It's like going back to your origins"

"It reminds us of how it used to be"



Key Findings

On a deeper level, the experience allows them to reconnect with themselves as a person, a human being, and to find themselves again within, in their view, a very stressful environment in France today.

Beyond their emotional connection, which is the key trigger to travel to Canada, the French have a love of nature. They strongly aspire to Canada's natural environment – seeing the rivers (especially the famed St. Lawrence), the waterfalls (Niagara Falls), visiting wilderness areas, mountains, seeing wildlife and whales.

The notion of dog sledding, skidooing, kayaking and canoeing excite those who want soft adventure.

Beyond Quebec

The typical pattern is to visit Quebec on the first trip, but then on repeat visits they are excited about experiencing other parts of the country. High on their priority lists are Ontario, B.C., Newfoundland and Labrador and the Territories. Nature is the big draw, but in part it also represents an opportunity to get closer to:

“The rest of the country where our French cousins live”

Clearly, the regions could build on that emotion by focussing on the “routes of the voyageurs” and the early French settlements in the Prairies and Atlantic Canada, for example.

The Barriers To Canada

The prime barrier to vacationing in Canada is that the country has not been positioned correctly to capture these underlying emotions.

Current brochures and ads focus on natural scenery, outdoor activity, Montreal and Quebec City, but these images do not touch the core driver.

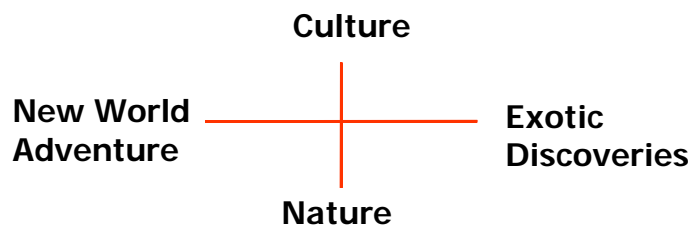
The objective must be to link the scenery with the (imagined) way of life to heighten the romance of visiting Canada. Further, as is the case with Germany and the U.K., images need more people and friendly faces. One of Canada's central appeal, is the friendly, welcoming Canadian people.



Key Findings

Canada's Image vs. Competitors

The Correspondence Analysis on the next page correlates destination imagery ratings on two computer driven axes:



Each of the attributes is plotted on the map with the positioning of each destination. The map, through multivariate analysis, illustrates the relative position of each destination and each attribute, based on their ratings on each. In other words, the more a particular destination is uniquely associated with an attribute the closer it is charted to it.

Brand Positioning

U.S.A

This country dominates the Northwest sector and is strongly associated with modern, urban culture, luxury and a wide variety of activities.

S.E. Asia

In the Northeast quadrant, SE Asia is associated with sun, beaches and different cuisines.

Canada

Canada is fairly central in the southern quadrants—pulled west by the association with outdoor activities and drawn east by the more passive nature observation.

Australia

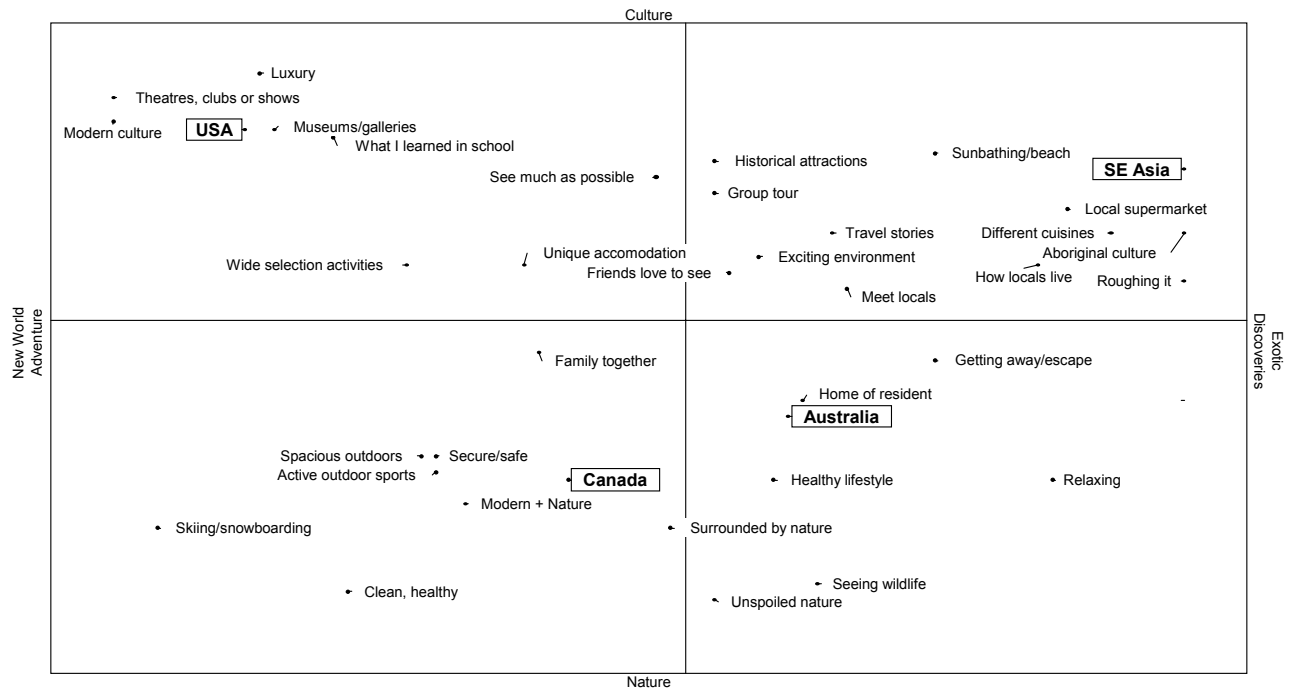
This country, a relatively minor destination for the French, is on the nature side (south) but more east, associated with relaxation in a natural setting.



Key Findings

KEY FINDINGS EXHIBIT 4: PERCEPTUAL BRAND/ATTRIBUTE MAP

Perceptual Brand/Attribute Map



Key Findings

The destination ratings provide a clear view of Canada's strengths and weaknesses vis-à-vis its three primary competitors.

KEY FINDINGS EXHIBIT 5: CANADA'S STRENGTHS AND WEAKNESS VS. COMPETITORS

	Vs. U.S.	Vs. Australia	Vs. South East Asia
Canada's Strengths	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Experiencing unspoiled nature • Surrounded by beautiful, unspoiled nature • Seeing wildlife in nature • Experiencing a country's healthy lifestyle • Visiting small towns • Wine/culture tours • Interact with local people 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Feeling safe and secure • Enjoying Alpine (downhill) skiing or snowboarding • Experiencing a country's healthy lifestyle 	<ul style="list-style-type: none"> • Experience a wide, spacious outdoor environment • Being in a clean, healthy environment • Surrounded by beautiful, unspoiled nature • Feeling secure and safe • Experiencing unspoiled nature • Experiencing a wide, spacious outdoor environment • Seeing wildlife in nature • Enjoying the convenience of the modern world while experiencing nature • Participating in active outdoor sports • See modern architecture
Canada's Weaknesses	<ul style="list-style-type: none"> • Experiencing a modern culture • Attending theatre, clubs, shows • Staying at luxury surroundings • Visiting museums or art galleries 	<ul style="list-style-type: none"> • Experiencing aboriginal culture • Sunbathing or other beach activities 	<ul style="list-style-type: none"> • Sunbathing or other beach activities • Opportunity to try different cuisines
Summary	<ul style="list-style-type: none"> • Canada is way ahead in terms of a natural environment • But the U.S. is better known for its modern, urban cultural 	<ul style="list-style-type: none"> • Australia has marketed its aboriginal tourism far better than Canada and provides more of a sun destination 	<ul style="list-style-type: none"> • Canada is far ahead in experiencing a wide, spacious, natural environment. • S.E. Asia offers sun and exotic cuisine

Key Findings

The Buy Cycle Model

a) **How it Works**

- The Buy Cycle Model was developed by Insignia during three separate tourism studies in China, Taiwan and South Korea examining in a real life environment the step by step planning process. The Buy Cycle was then subsequently evaluated in 18 focus groups in Europe--the U.K., France and Germany. Those discussions further validated that this is the way people think. Finally, Insignia built a quantitative question into the 3 studies to measure where people are on the Buy Cycle path and where the barriers are. The findings confirm the focus group learning and direct us toward the importance of helping prospects build their own "movie".



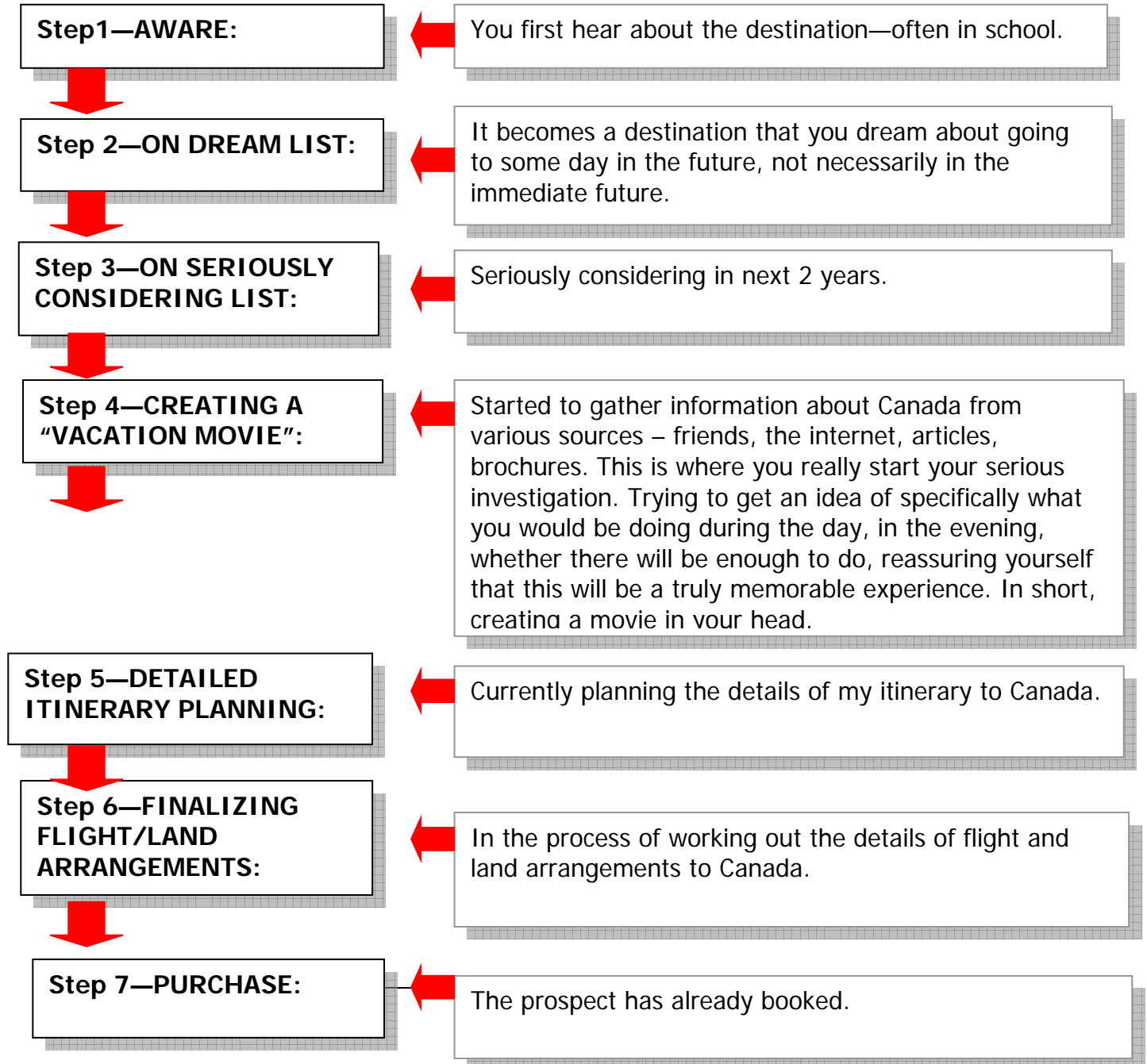
Key Findings

The Buy Cycle Model

a) How it Works

- The model is described below:

KEY FINDINGS EXHIBIT 6: THE BUY CYCLE MODEL – HOW IT WORKS



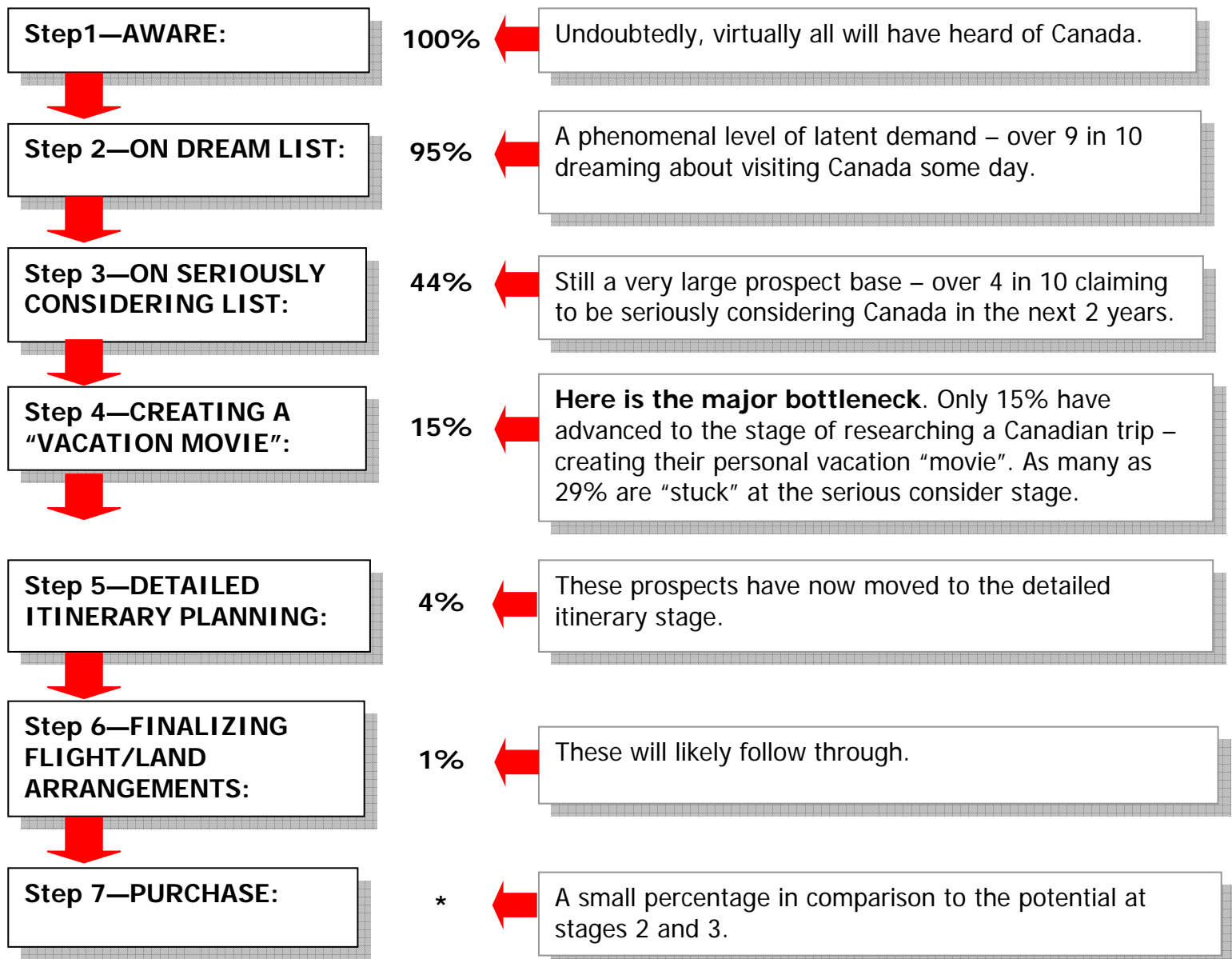
Key Findings

The Buy Cycle Model

b) Bottlenecks and Barriers – Canada

- The chart below illustrates how far the long-haul travel market has advanced along the Buy Cycle path for a trip to Canada.

KEY FINDINGS EXHIBIT 7: THE BUY CYCLE MODEL – BOTTLENECKS AND BARRIERS - CANADA



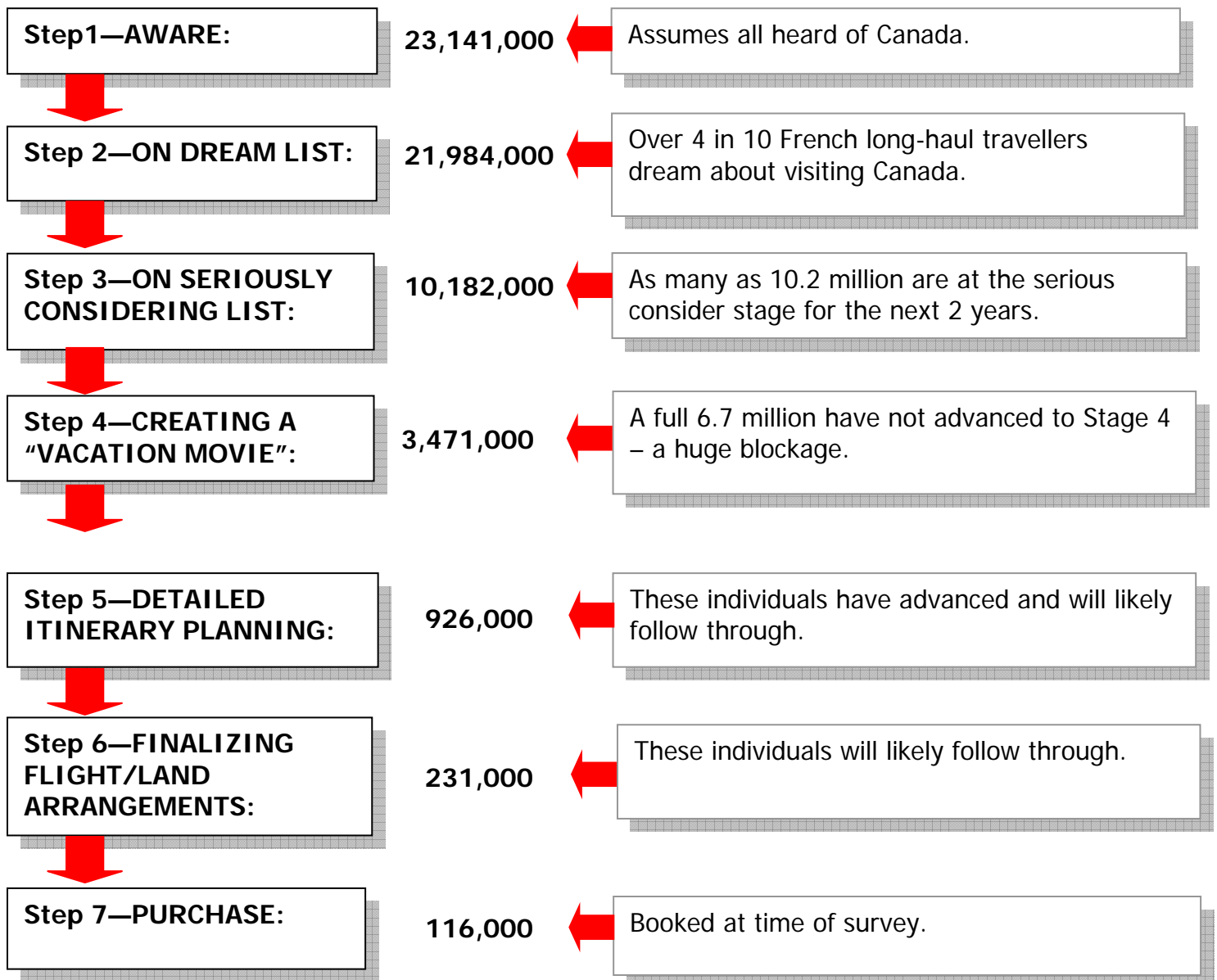
Key Findings

The Buy Cycle Model

c) Projected Market Size

- There are 23.1 million potential long-haul travellers in France out of a population of 49,131,000 age 18 and over.

KEY FINDINGS EXHIBIT 8: THE BUY CYCLE MODEL – PROJECTED MARKET SIZE



Key Findings

The Buy Cycle Model

Implications

- The Partners need to focus more on **Stage 4** – helping serious prospects create their personal Canadian vacation movie, rather than building initial awareness, (Stage 1), getting Canada on the Dream List (Stage 2) or even on the Serious Consider List (Stage 3).

Access to Detail

- To create a “movie”, prospects need access to detail – especially itinerary ideas.
- Given the importance of the internet they must be strongly encouraged to visit the most appropriate Canadian websites.
- Once on these sites they need help in creating itinerary ideas.
- Then, to elaborate on key attractions and locations on route, short video clips can work very effectively, as well as any other descriptive material that will aid the prospect in visualizing him/herself in the scene having a wonderful time.
- Blogs from past visitors are also welcome, as long as they are trustworthy as **legitimate** experiences by **real** travellers.

Viral Marketing

- Friends, especially previous visitors or residents are so highly influential that the Partners need to seriously explore viral marketing ideas.
- Ways must be developed to encourage friends or past visitors to “spread the word”.

Itinerary Ideas

- One of the reasons agent/operator brochures are popular sources of “movie” planning is because they provide itinerary ideas and help the prospects get their heads around their personal vacation concept.

Key Findings



The Buy Cycle Model

Fighting Procrastination

- Facilitating personal “movie” creation helps the prospective visitor to stimulate themselves and drive them toward moving on their dream.
- However, industry advertising for low cost flights help to communicate viability (“Canada seems so much closer when the fare is so low”), as do ads featuring special events.
- Procrastination is Canada’s worst enemy. Helping prospective visitors generate their own excitement is the best route to stimulating near term travel.



Key Findings

Market Segmentation

The French long-haul market can be sub-divided into 5 benefit segments.

High Culture (25%)

This segment is attracted to city life and culture.

Local Culture (25%)

Meeting and interacting with local people and experiencing how they live at the grassroots level is the key focus of this group.

Resort Style (21%)

Relaxation, sun and luxury dominate here.

Nature Viewing (21%)

Being surrounded by beautiful nature and taking it all sensually drives this segment.

Nature Participation (8%)

This group is not satisfied with visual stimuli. They want to get involved. Soft adventure prevails.

Canada's Prime Targets

- 1. Local Culture (25%)**
- 2. Nature Viewing (21%)**
- 3. Nature Participation (8%)**



Key Findings

The ideal Canadian vacation and each prime target's profile are described below:

KEY FINDINGS EXHIBIT 9: IDEAL CANADIAN VACATION — BY TARGET SEGMENT

Ideal Canadian Vacation	Target Segment		
	<u>Local Culture</u>	<u>Nature Viewing</u>	<u>Nature Participation</u>
Season of travel	<ul style="list-style-type: none"> July to September 	<ul style="list-style-type: none"> July to September 	<ul style="list-style-type: none"> July to September
Multi-country visit	<ul style="list-style-type: none"> Only 31% would include U.S. 	<ul style="list-style-type: none"> Only 30% would include U.S. 	<ul style="list-style-type: none"> Only 39% would include U.S.
Duration in Canada	<ul style="list-style-type: none"> 2 weeks 	<ul style="list-style-type: none"> 2 weeks 	<ul style="list-style-type: none"> 2 weeks
Fully Independent Travel (FIT)	<ul style="list-style-type: none"> Majority 82% – package: 31%, non-package: 51% 	<ul style="list-style-type: none"> Majority 78% – package: 39%, non-package: 39% 	<ul style="list-style-type: none"> Majority 75% – package: 39%, non package: 35%
Preferred regions	<ul style="list-style-type: none"> Quebec, Ontario - BC, Newfoundland /Labrador and Territories also appealing 	<ul style="list-style-type: none"> Quebec, Ontario - BC, Newfoundland /Labrador and Territories also appealing 	<ul style="list-style-type: none"> Quebec, Ontario - BC also appealing
Preferred accommodation	<ul style="list-style-type: none"> Authentic wilderness lodges, B&B's, Canadian ranches and farms are highly interesting accommodation. 	<ul style="list-style-type: none"> Wilderness lodges and B&B's are unusually appealing, city hotels relatively low on their preferred list. 	<ul style="list-style-type: none"> Resorts (mountain, lakeside)

Key Findings

Ideal Canadian Vacation	<u>Target Segment</u>		
	<u>Local Culture</u>	<u>Nature Viewing</u>	<u>Nature Participation</u>
Preferred activities	<ul style="list-style-type: none"> • Getting to know the local inhabitants, visit small towns and really get to the grass roots of the French Canadian culture. • Seeing old architecture, museums and galleries. • Observing and interacting with nature is also extremely important. 	<ul style="list-style-type: none"> • Experience nature but also experience the French Canadian life and cuisine. • Visit small towns and get to know the local inhabitants. • Little interest in traditional cities—preferring to get away from urban structure and out into small towns and nature. • See the Aurora, observe whales, observe wildlife, visit wilderness areas. 	<ul style="list-style-type: none"> • Trail riding, cycling, snowmobiling, heli/cat skiing as well as traditional skiing and snowboarding. • Also a desire to indulge themselves—with wine/culinary tours, spa visits, urban culture and nightlife. • They have far less aversion to Canada's modern cities.
<u>Segment Profile</u>			
<u>Gender</u>			
Male	52	53	69
Female	49	47	31
<u>Age</u>			
18 to 29	17	24	40
30 to 39	19	23	24
40 to 49	23	19	19
50+	42	34	16



Key Findings

Influential Media

Accounts of past trips to Canada by friends/relatives who have been there (or who currently live in Canada) are the prime drivers of the decision to vacation in Canada (50%).

The travel trade plays a minor role (to only 16%), while the internet (19%) and non-commercial media (non-paid advertising) including television travel shows (14%), news stories (16%) and articles (10%) are critical catalysts:

- Talassa/Thalassa, Voyage and other travel channels are the most influential.
- Among internet users, word/phrase search engines (60%), general travel sites (42%), tour operator sites (39%) and national tourist offices (35%) lead.

Trip Planning

The French plan their trip to Canada 10 months in advance and book 4 ½ months in advance of travel. Consequently, product promotion must be timed well in advance of the travel season.

Only half book through travel agents or package providers (53%), while direct to airlines (38%) or hotels (11%) is just as common.

The Travel Trade

As in Germany and the U.K., the trade claim that most travellers to Canada had made up their mind to go to Canada prior to visiting the agent.

The agent today appears to have little influence on selling Canada to first time travellers. However, they can and do have significant influence on promoting and marketing specific side trips, activities and modular packages.

Also, they have significant influence with 2nd plus time travellers to Canada.

Key Findings

The trade confirmed what the consumer played back:

“An image that’s a bit too nature so people don’t know what else there is to do”

“Canada lacks a mythical dimension”

They see great potential beyond Quebec and make a number of suggestions.

- First, promote all of the wealth and diversity of the country through the appeal of the west and the less well-known regions like the maritime provinces and New Brunswick, *“promote the wonderful landscapes of the maritime provinces, the island of Newfoundland, Nova Scotia, all of those untamed places that are not well known at all”*
- Stress the human dimension and Canadians themselves, their friendliness / hospitality, but not only Quebecois *“say it’s a country that offers a warm welcome, where contact is easy, but everywhere, not just in Montreal”*
- Promote the country’s history beyond the French aspect, the cultural side, as well, with the American Indians, in particular
- Stress the originality of the existing products, showing the diversity of activities specific to each site.
 - Products featuring “cities and wilderness” instead of “exclusively Nature”, even if the cities do not seem very appealing to the public because they are poorly known: in particular, taking advantage of Quebec bicentennial
 - Products with specific themes on a given region like cultural discoveries in cities, ethnic (Indians) in the west or sports activities in natural sites like rafting, acrobanching, life on a ranch, etc. “products that promote activities in a specific region”

Key Findings

What “really blows them away”, according to one operator is asking for guest measurements before they leave on the trip to Canada (and Manitoba). The purpose is to be able to outfit them in fur trader costumes at an event while in the province.

- This is an excellent example of involving the tourist and truly making the trip experiential.

In terms of communicating the Canadian experience, Canadian receptives provide a valuable point of view:

- Avoid focusing on the big cities
- Treat them more as gateways
- Feature all the unique elements or add-ons available to the French tourist in Canada:
 - Snowmobiling
 - Dog sledding
 - Quebec City's ice hotel
 - Log cabin dinners
 - Sea planes
 - River rafting
 - Wine tasting
 - treks in the forest

These are all relatively unique experiences and truly authentic. The desire for authenticity is a primary goal not just of the French, but the Germans, the Brits and tourists from other continents as well. It is clearly a critical selling proposition for Canada.

Smiling, friendly people are also an important value added asset of Canada's that needs to be reinforced.



Key Findings

Canada's Current Visitor

The profile of Canada's current visitors from France is outline below.

KEY FINDINGS EXHIBIT 10: CANADA'S CURRENT VISITORS' PROFILE

Multi-country visits	<ul style="list-style-type: none"> 84% Canada only. Very few in combo with U.S. (16%)
Trip Duration (average)	<ul style="list-style-type: none"> Average nights on trip:21, average in Canada:16
Season	<ul style="list-style-type: none"> June to October
Party Composition	<ul style="list-style-type: none"> With spouse (60%), alone (only 13%), with children (only 15%) Average party size: 3.6 persons
FIT	<ul style="list-style-type: none"> Mostly FIT (79%)
Top Five Activities in Canada	<ul style="list-style-type: none"> Getting to know local inhabitants Taking city tours Viewing rivers or waterfalls Fine dining Visiting places of historical interest
Purpose of Trip	<ul style="list-style-type: none"> Experiencing natural scenery, interacting with local people
Accommodation	<ul style="list-style-type: none"> City hotels/motels (broad price range) Home of friend or relative (32%) Special interest in B&B's, authentic wilderness lodges and cabins/cottages
Expenditure (average)	<ul style="list-style-type: none"> 4,400 Euros per trip
Profile	<ul style="list-style-type: none"> Across France (Paris only 23%) 52% under 40, only 25% 50+ 44% close friends/relatives in Canada



Key Findings

French Travel Market Trends to Canada — 1999 to 2007

The following are key trends that have developed in the French market for Canada over the past 10 years.

1. Potential Long-haul Market Grows Dramatically

- From 9.1 million potential long-haul trips in 1999 to 23.1 million in 2007.

2. Major Decline in Trips to North America

- In 1999, 24% of long-haul trips were destined to the U.S. In 2007, that share dropped to 14%.
- Over the same period, trips to the Caribbean declined from 19% to 15%, and to Canada 15% to 11%
- Likely the negative sentiment toward U.S. travel has contributed to neighbouring region declines.
- Asia was a major beneficiary in this shift.

3. Spousal Travel More Common

- In 1999, one third of all travellers journeyed alone to Canada. Today, that segment has fallen to 13%, while the majority who travel with a spouse or significant other is at 60% (up from 44%).

4. Travel Agents Processing Fewer Trips

- In 1999, travel agents processed 73% of trips to Canada. This has declined to 53% in 2007.

5. Internet Bookings Now Substantial

- Now, 47% of trips to Canada are booking on-line, with 28% direct to an airline. In 1999, internet use was still very under developed.



SWOT Analysis

SWOT Analysis

Strengths

- The French economy is expected to remain healthy into the foreseeable future.
- The outbound travel market continues to be robust, although not expanding.
- Canadian arrivals, although fairly flat since 2004, are showing signs of recovering (+2% January to August, 2007).
- The French love Quebec and the Canadian outdoors. The opportunity to connect with French Canadians takes them back to their roots in a very positive way.
- The stressful French lifestyle is a big driver for travel to Canada.
- Canada is considered welcoming and friendly to French travellers.
- In the same geographical area, being able to experience the conveniences of the modern world while experiencing nature.
- A clean, healthy environment.
- Unique, intriguing attractions such as the Territories, aboriginal tourism and superlative outdoor experiences (e.g., dog sledding, skidooing).
- Canada is a very popular long-haul destination.
- Canada ranks first as a dream destination.
- The French on repeat visits are highly interested in seeing the rest of the country "that our French cousins live in"
- Canada can satisfy an immediate need – de-stressing and getting back in touch with oneself.
- Almost half of current visitors (44%) have friends/relatives in Canada.
- A high interest in aboriginal tourism.



SWOT Analysis

- Nine out of ten recent travellers to Canada would recommend it to others.
- French travellers show interest in most regions of Canada.
- Canada has an excellent environmentally responsible rating, although it is not a destination motivator.

Weaknesses

- Current brochures and ads focus too much on natural scenery, outdoor activity, Montreal and Quebec City. These are not the core emotional drivers to visit Canada which is to connect with French Canadian culture and get in touch with their own past and roots.
- Canada outside of Quebec is not well known.
- An image which is too nature focuses so people do not know what else there is to do in Canada.
- Lack of product for regions outside Quebec.
- There is a lack of awareness that Canada can provide a highly interesting, rewarding and diverse vacation experience.
- Enormous latent demand (10.2 million French are seriously considering a Canadian trip in the next 2 years. Only 0.9 million have advanced to the itinerary planning stage). The CTC's current budget may be too low to effectively stimulate this demand.
- Canada is so vast it can intimidate those without a clear view of a future itinerary.
- Canada is relatively expensive, according to the trade.

SWOT Analysis

Opportunities

- The core selling proposition needs to shift away from nature and cities to:
 - French Canadian cultural experiences in an authentic natural environment.
- Great opportunities for regions beyond Quebec to communicate unique nature based experiential product.
- Opportunity to leverage the historic French connection in Western Canada (e.g., Louis Riel, voyageurs), Atlantic Canada (e.g., Acadians).
- High interest in aboriginal tourism.
- Assist the 10.2 million French seriously considering Canada in the next 2 years to create their own vacation “movie” and advance through the Buy Cycle.
- Improvements to the official websites to assist vacation planning.
- Ensure high placement of CTC/partner sites on the dominant word search engines.
- More itinerary ideas for the dominant FIT traveller.
- French prospective visitors typically want to focus on specific regions of Canada after seeing Quebec, so provide regional itineraries.
- Provide films for television travel shows, a highly influential medium.
- Providing more trip modules (i.e. add-on vacations) which are growing in popularity among FIT travellers.
- The friendly, welcoming nature of Canadians is an under-promoted asset.

SWOT Analysis

Threats

- The strengthening of the Euro against the American dollar may encourage greater French travel to that country.
- As the travel trade becomes less influential in the decision to travel to Canada (due largely to the internet's influence), the ROI of CTC funds directed to the trade may diminish.



The Way Forward: Considerations

The Way Forward: Considerations

There are 9 key areas that the Partners should focus on to accelerate market growth within France.

- 1. Reposition The Canadian Brand to Broaden Appeal**
- 2. Positioning Pitfalls To Avoid**
- 3. Break The Buy Cycle Bottleneck**
- 4. Enhance User Friendly Websites**
- 5. Campaign Needed To Drive Prospects to the Websites**
- 6. Influential Media**
- 7. Trade Support**
- 8. New Product Must Be Brought To Market**



The Way Forward: Considerations

1. Reposition The Canadian Brand To Broaden Appeal

The Appeal of Canada

- ♦ The French are great explorers and travel globally, but the number one destination on their dream list is Canada. As many as 22.0 million French long-haul travellers dream about visiting Canada.
- ♦ So what is it that inspires them? There is no question that the key draw is to experience the French Canadian culture and way of life.
- ♦ They have a very clear vision of a “simpler way of life”, peaceful and calm”, where people live “in communion with nature”.
- ♦ They imagine:
 - ♦ *“Trapper’s cabins”*
 - ♦ *“Story telling”*
 - ♦ *“Warm and welcoming French people”*
 - ♦ *“Speaking genuine French”*
 - ♦ *“They sing French, they don’t speak it”*
- ♦ A perfect day in their minds would be:
 - ♦ *“Get up early, have a ‘woodcutter’s breakfast’ and set off to discover”*
 - ♦ *“Getting up really early and living the whole day at the pace of nature”*
 - ♦ *“Walking around in the woods, eating our meals with a trapper who would be teaching us about nature”*
 - ♦ *“Our ancestors came from France 350 years ago. Let us show you our country and our way of life”*



The Way Forward: Considerations

- ♦ Emotionally, it takes them back to their roots, a time of different values:
 - ♦ *“It’s like going back to your origins”*
 - ♦ *“It reminds us of how it used to be”*
- ♦ On a deeper level, the experience allows them to reconnect with themselves as a person, a human being, and to find themselves again within (in their view) a very stressful environment in France today.
- ♦ Beyond their emotional connection, which is the key trigger to travel to Canada, the French have a love of nature. They strongly aspire to Canada’s natural environment – seeing the rivers (especially the famed St. Lawrence), the waterfalls (Niagara Falls), visiting wilderness areas, mountains, seeing wildlife and whales.
- ♦ The notion of dog sledding, skidooring, kayaking and canoeing excite those who want soft adventure.

Beyond Quebec

- ♦ The typical pattern is to visit Quebec on the first trip, but then on repeat visits they are excited about experiencing other parts of the country. High on their priority lists are Ontario, B.C., Newfoundland and Labrador and the Territories. Nature is the big draw, but in part it also represents an opportunity to get closer to:
 - ♦ *“The rest of the country where our French cousins live”*
- ♦ Clearly, the regions could build on that emotion by focussing on the “routes of the voyageurs” and the early French settlements in the Prairies and Atlantic Canada, for example.

The Way Forward: Considerations

Barriers to Canada

- ♦ The prime barrier to vacationing in Canada is that the country has not been positioned correctly to capture these underlying emotions.
- ♦ Current brochures and ads focus on natural scenery, outdoor activity, Montreal and Quebec City, but these images do not touch the core driver.
- ♦ The objective must be to link the scenery with the (imagined) way of life to heighten the romance of visiting Canada. Further, as is the case with Germany and the U.K., images need more people and friendly faces. One of Canada's central appeals, is the friendly, welcoming Canadian people.

The Ideal Positioning

- ♦ The primary goal of French travellers is to connect with French Canadians and their way of life. Life in France is very stressful, in their own admission, and they find the opportunity to re-connect with their roots and a more authentic lifestyle both refreshing and grounding. They return to France feeling like a better person.
- ♦ To connect with French Canadians should be the core selling proposition to tap into these emotions and fundamental needs.
- ♦ However, the other product benefit of Canada is our authentic, incredible nature, so ideally the product concepts need to be brought together.
- ♦ This can most effectively be done by addressing it the way French people visualize it:
 - ♦ ***"Come to Canada and experience how French Canadians live in harmony with nature"***
- ♦ This concept brings together culture and nature but can also incorporate the third key benefit of Canada—**warm, friendly, welcoming people**.
- ♦ It must be remembered that the desire for connecting with French Canadians in a traditional setting does not mean that cities and towns are of no interest to the French. The key is to focus on the opportunity for the French to "feel" a sense of **communion—the highest order benefit sought (see Laddering)**.



The Way Forward: Considerations

- ♦ In the case of Quebec City and its 400th anniversary, the best way to position this urban setting is to focus on the opportunity for the French to feel a sense of communion with the French Canadian culture—i.e. a sense of fellowship, harmony, intimacy, togetherness.
- ♦ In a way, we are simulating a VFR visit. So, illustrating closeness with French Canadians in their real life and unique Canadian environment should be the focal point.
- ♦ Regions beyond Quebec should concentrate on their:
 - ♦ Unique nature based experiential product
 - ♦ Cultural attractions such as aboriginal tourism
 - ♦ Building in wherever possible the French connection (e.g. early French settlers, voyageurs, etc)



The Way Forward: Considerations

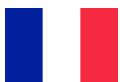
2. Positioning Pitfalls to Avoid

Do's	Don'ts
<ul style="list-style-type: none"> ♦ Demonstrate vibrant cities on the edge of nature ♦ Visitors can enjoy both outdoor experiences and urban comforts virtually on the same day ♦ Feature unique nature experiences on one hand (e.g., icons, plus snowmobiling, dog sledding, openness, vistas, etc.) ♦ Feature unique cultural experiences (e.g., aboriginal, Canadian urban culture, meeting locals, log cabins, B&B's, etc.) ♦ Re-enforce the availability of comfort (e.g., good food, accommodation, socializing, etc.) 	<ul style="list-style-type: none"> ♦ Overly emphasize Canadian cities <ul style="list-style-type: none"> ♦ Too much like 1,000's of other cities around the world ♦ For the French and Germans treat them as gateways. Both want to get away from cities ♦ Show too much remote wilderness <ul style="list-style-type: none"> ♦ Europeans are intimidated by remoteness, bears – too scary. ♦ Use images that would be considered cliché—not unique to Canada

3. Break The Buy Cycle Barrier

a) The Buy Cycle model

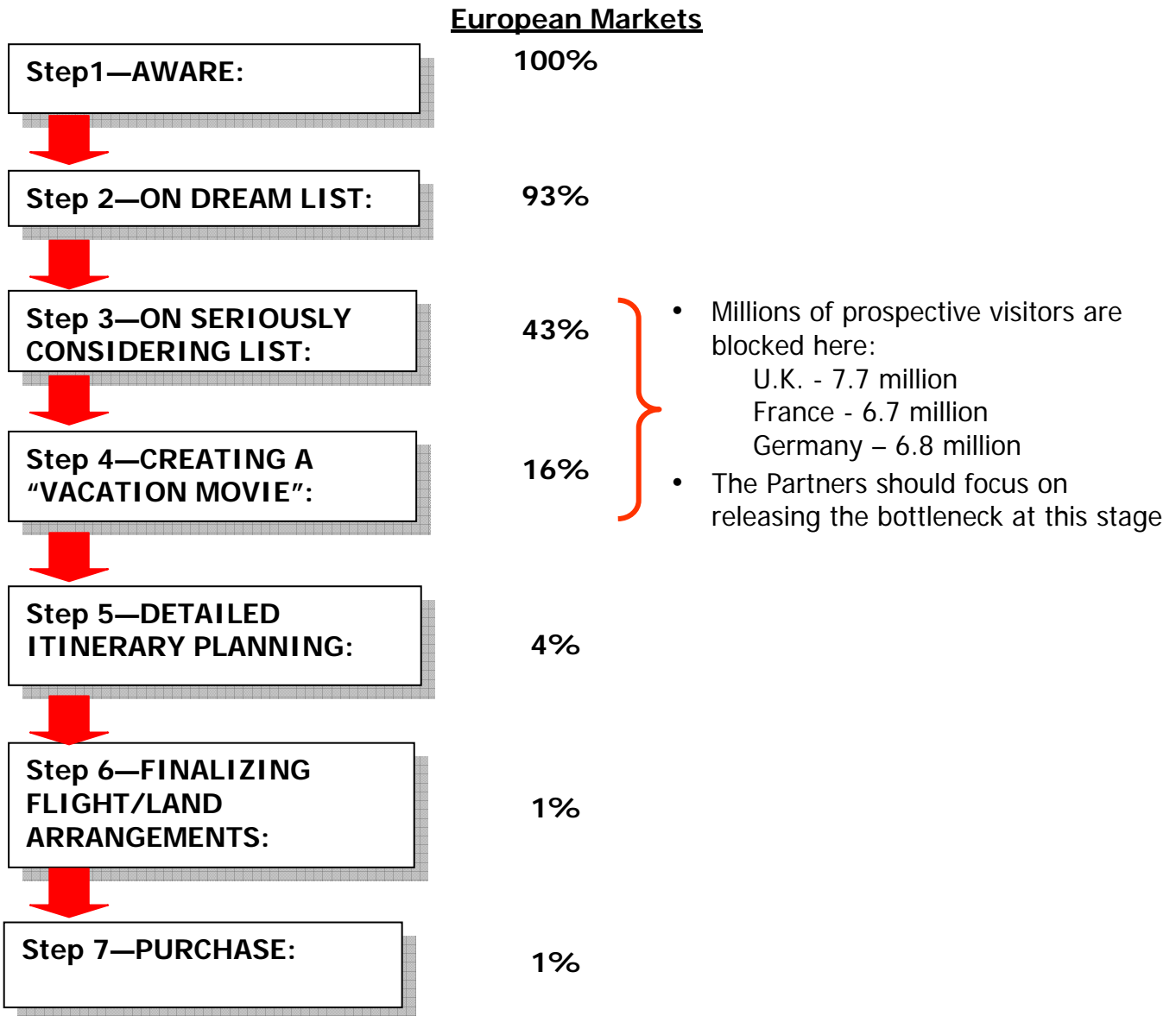
- ♦ Insignia's Buy Cycle Model has now been validated by Insignia in 6 countries:
 - ♦ China
 - ♦ South Korea
 - ♦ Taiwan
 - ♦ UK
 - ♦ France
 - ♦ Germany
- ♦ In all markets travellers can relate to the path to purchase process.
- ♦ Buy Cycle a 7-step model.



The Way Forward: Considerations

Buy Cycle Model

KEY FINDINGS EXHIBIT 1 1: BUY CYCLE MODEL — EUROPEAN MARKETS



The Way Forward: Considerations

What Are The Components of The Ideal Movie?

1. A route or itinerary
2. A sense of time, distance
3. The promise of memorable moments/activities
4. Reassurance of fun and good times
5. Reassurance of comforts (accommodation, good food)
6. Approximate budget requirements

Where Do Travellers Go To Build That Movie?

1. Friends (past visitors or destination residents)
 - ♦ What better way to get a trusted recommendation on where to go and must sees.
2. Internet
 - ♦ Clearly the growth influencer
 - ♦ Word search engines most popular
 - ♦ Official government sites imply objectivity
3. Existing Packages
 - ♦ A great place to get itinerary ideas without any obligation to purchase
4. Travel Agents
 - ♦ Their advice is less important now because the internet has provided so much knowledge.



The Way Forward: Considerations

4. Enhance User Friendly Websites

The Partners Should Enhance User Friendly Websites

Most official sites appear built for the North American market.

They assume travellers are basically familiar with distances and travel times.

Yet, for Europeans, visitors express lack of awareness of place names, or distances involved.

They need:

- ♦ Maps
- ♦ Itinerary suggestions
- ♦ Routes with trip times by various forms of transportation
- ♦ “Must-sees” along the way
- ♦ Pictures, video tours, etc., of highlights along the way

Website Report Card

The Insignia team evaluated the 26 key sites provided by provincial/territory partners for the online Forum sessions

Only 1 in 26 scored Excellent or Acceptable on all 5 criteria
www.earthrhythms.ca)

Criteria	Excellent	Acceptable	Poor	N/A
1. Ease of finding visuals	9	6	6	5
2. Ease of finding suggested itineraries	8	7	3	8
3. Ease of finding route maps	8	8	5	5
4. Ease of trip planning	8	7	6	5
5. Ease of linking to online community (including RSS feeds)	4	1	--	21

The Way Forward: Considerations

5. Campaign Needed To Drive Prospects to the Websites

Internet used primarily as a planning tool, not as a source of inspiration.

Hence, the Partners should continue with its advertising/promotional campaign to drive highly serious prospects to their website(s).

The campaign should inform prospects that they can find everything they need on the websites to plan their dream vacation.

With millions of European travellers at the Seriously Considering stage, there undoubtedly would be a payback from this type of campaign.

Clearly, necessary website content should be in place first to assist their planning.

6. Influential Media

Friends or relatives who have been to Canada recently (or who live in Canada) are the most powerful motivators for a trip to Canada. Consequently, viral (i.e. word of mouth) marketing is a direction worth exploring.

Blogs, forums and word of mouth promotional techniques are becoming more common place today and are natural channels for the tourism industry.

Non-commercial media (e.g. television travel shows and public relations) are also highly influential.

These avenues should be explored fully before considering a costly traditional advertising campaign.

The Way Forward: Considerations

7. Trade Support

Fact

With internet booking soaring, agents see their future survival depending on three directions:

1. Specializing in specific destinations/products (i.e. cruise specialists, Canada specialists, aboriginal tourism specialists, etc)
2. Winning back customers who have bad experiences booking direct, or
3. Developing their own website to attract internet bookers

Implications

Clearly, the Canada specialist programme benefits the first solution above. It is well regarded in the industry and should be continued.

With agents who are running advertising campaigns for Canada and with websites capable of promoting Canada, there is a definite role for the CTC in co-op promotional efforts to help stimulate demand.

Fact

Although trending down, travel agents are still booking a significant share of trips:

- ♦ U.K.—44% in 2007
- ♦ Germany—59%, down from 89% in 2001
- ♦ France—53%, down from 73% in 1999

Implications

With ground details, the trade still remains highly influential in directing prospects **within** the country to specific regions and to **specific products/ experiences** within a region.

- ♦ Consequently, it will be important for partners in particular to continue a significant level of trade activity.



The Way Forward: Considerations

Fact

In 1997, 73% of U.K. travellers said that travel agents were influential in choosing Canada.

- ♦ Today, only 7% in the U.K. say that travel agents have any role in their choice of Canada.
- ♦ In Germany, the comparable figure is 7%, in France 16%.
- ♦ The travel trade interviews confirm these data.

Implications

This raises the question about the agent's ultimate influence in selling Canada.

- ♦ It may be time for the CTC to evaluate how much of its resources should be directed toward the trade, since they are no longer primary sellers of Canada
- ♦ Funds could potentially be made available for a more robust consumer campaign.

8. New Product Must Be Brought to Market

Tour operators are reluctant to experiment with new product until demand is proven

- ♦ Consequently, agents have only the same old product to sell.

Tour operators need to be convinced that demand exists for new product and how important it is to expand their product line.

Although packages still constitute a significant share of trips (38% for the U.K., 36% for German and 49% for French trips to Canada), the market will continue to swing more toward non-packaged FIT and, consequently, by pass the operator.

- ♦ This should be motivating enough to develop product for today's market



The Way Forward: Considerations

A type of product of particular interest to FIT travellers is a 2 or 3 day add on excursion to their core vacation.

- ♦ In other words, for the FIT visitor to Toronto and Niagara Falls, a 2 day side trip to the Prince Edward County wine region or hiking near Georgian Bay, for example.
- ♦ For the FIT visitor to Vancouver, a side trip to Tofino, the Gulf Islands, Whistler, or the Okanagan, for instance.

Websites need to package experience rich, add on excursions for overseas visitors.

Top Five Priorities

1. Encourage the industry to redesign their websites to make it easy for prospective visitors to create their own "movie"
2. Continue campaigns to drive prospects to the websites promising them that they can easily create their own dream vacation to Canada
3. Ensure that the core CTC campaign is customized enough to reflect unique market needs
4. Ask the agency for suggestions for a viral marketing programme building on the powerful VFR linkage with Canada
5. Consider co-op campaigns with travel agencies who have promotional programmes beyond their own offices

Findings in Detail

Travel Trends

Section 1: French Economic Outlook



1.1 Economic Overview

GDP:	1,791,953 million Euros (\$1.9 trillion PPP)
Inflation:	1.9%
Exchange:	1 Euro = 1.47 Canadian Dollars (avg. to Nov. '07)
Population:	63,195,457
Unemployment:	9.5%
Leave Entitlement:	5-6 weeks
2008 Issues:	Employment law reforms are being considered to combat the difficulty of firing employees in France. The current situation is creating a great deal of social pressure in France; however reforms will create feelings of insecurity in workers—likely to reduce willingness to take vacations longer than a few days. However, after the initial period of worry, the labour market will adapt.
Overall:	Strong and slowing down

The third largest European economy after Germany and the UK, France is rated 6th in the world according to purchase power parity. While past growth has been good, slowdowns have begun and more are predicted for 2008-2009. There is, additionally, a risk of recession in this period as a result of international connections (particularly ties with the US economy) coupled with internal economic structure problems.

In particular, the labor market is currently arranged in such a way that firing (and thus hiring) is a difficult process. This has resulted in a low mobility workforce with many young individuals under or unemployed. While this has allowed established workers to enjoy an enviable degree of job security, it has created a number of social and economic issues that the present government hopes to address.

1.2 Population and Demographics

France is the most fertile country in the European Union, with a total fertility rate of 2.0—very near the replacement rate. France's population growth is mostly due to births, with immigration counting for approximately a quarter of population growth.

EXHIBIT SECTION 1-1: FRENCH POPULATION BY AGE - 2000 TO 2006

	2000	2001	2002	2003	2004	2005	2006
Under 5	3,795,245	3,857,515	3,911,512	3,958,371	3,985,779	3,990,739	3,999,876
5 to 9	3,778,486	3,754,957	3,742,165	3,755,920	3,800,712	3,858,762	3,914,838
10 to 14	4,007,479	4,006,834	3,992,461	3,955,690	3,900,352	3,853,453	3,823,707
15 to 19	4,073,052	4,053,038	4,040,971	4,053,848	4,08,0247	4,090,412	4,082,478
20 to 24	3,862,133	3,947,299	4,029,415	4,075,003	4,092,727	4,085,612	4,065,979
25 to 29	4,266,803	4,151,036	4,029,118	3,931,361	3,877,706	3,906,604	3,995,666
30 to 34	4,392,467	4,395,451	4,425,538	4,458,634	4,450,652	4,382,990	4,266,254
35 to 39	4,502,689	4,525,013	4,535,609	4,523,848	4,493,834	4,469,075	4,467,088
40 to 44	4,376,989	4,402,919	4,424,748	4,457,876	4,500,694	4,528,498	4,545,761
45 to 49	4,305,549	4,298,577	4,308,090	4,320,554	4,338,847	4,358,421	4,380,096
50 to 54	4,166,239	4,302,861	4,314,222	4,299,821	4,277,772	4,254,026	4,242,106
55 to 59	2,852,391	3,041,146	3,331,254	3,601,323	3,848,749	4,087,028	4,215,681
60 to 64	2,746,278	2,694,141	2,658,465	2,671,887	2,708,272	2,766,182	2,946,252
65+	9,625,079	9,750,775	9,871,996	9,977,665	10,088,369	10,186,387	10,249,679
Total	60,750,876	61,181,560	61,615,562	62,041,798	62,444,707	62,818,185	63,195,457

Source: EuroStat

1.3 Exchange Rates

France uses the Euro, and thus its purchasing power abroad is tied to that of the whole of the Euro area.

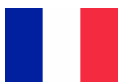
Since 2000, the Euro has generally gained in strength against other currencies, allowing for greater international buying power. Gains have been particularly high against the US dollar (which has been slipping in value).

For the Canadian dollar, gains have been more modest. Still, the Euro trades favorably against the Canadian dollar, even with recent increases in strength. This is true in general of the Euro's value against foreign currencies used in popular French destinations: despite recent slips in value, the Euro has strong international buying power, facilitating French long-haul travel.

EXHIBIT SECTION 1-2: EURO EXCHANGE RATES 2000 TO 2006

Currency	2000	2001	2002	2003	2004	2005	2006
US Dollar	.92	.90	.95	1.13	1.24	1.25	1.26
CAD Dollar	1.37	1.39	1.48	1.58	1.62	1.51	1.42

Source: FXHistory, from Interbank Rates



1.4 Economic Trends

The French economy has had a relatively healthy and stable period for the past half decade. Disposable income is good and increasing, and inflation has remained relatively stable at acceptable levels.

While unemployment levels are not particularly alarming, they are less firm than in other countries owing to issues with the structure of French employment. In addition, the job market is considered relatively inflexible (as mentioned earlier) and there are reforms underway to make it a more modern, agile system.

However, as the trends show, the French economy has performed well and it is expected to continue to perform well given its circumstances. There is no reason to expect that in the short to mid term there will be an economic driven downturn in outbound travel.

EXHIBIT SECTION 1-3: FRENCH ECONOMIC INDICATORS TRENDS

Indicator	2000	2001	2002	2003	2004	2005	2006	2007(p)
GDP Growth (% Change Over Previous Year)	3.9	1.9	1	1.1	2.5	1.7	2.0	1,9
Disposable Income (per inhabitant converted to \$CAD)	35,056	36,087	36,676	37,560	38,886	39,917	41,537	42,863
Inflation	1.8	1.8	1.9	2.2	2.3	1.9	1.9	-
Unemployment	9.1	8.4	8.7	9.5	9.6	9.7	9.5	-

Source: EuroStat

Section 2: Outbound Travel Trends

2.1 Size Of Potential Market

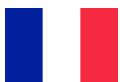
The potential long-haul travel market in France has more than doubled in size since 1999, largely due to more French residents either having travelled abroad in the past 3 years or seriously intending to in the next 2 years.

EXHIBIT SECTION 2-1: FRANCE LONG-HAUL MARKET TRENDS

<u>France Long-Haul Market Trends</u>		
	<u>1999</u>	<u>2007</u>
Adult population	44,900,000	49,100,000
Incidence of long-haul travel*	20.4%	47.1%
Projected market size	9,149,000	23,141,000

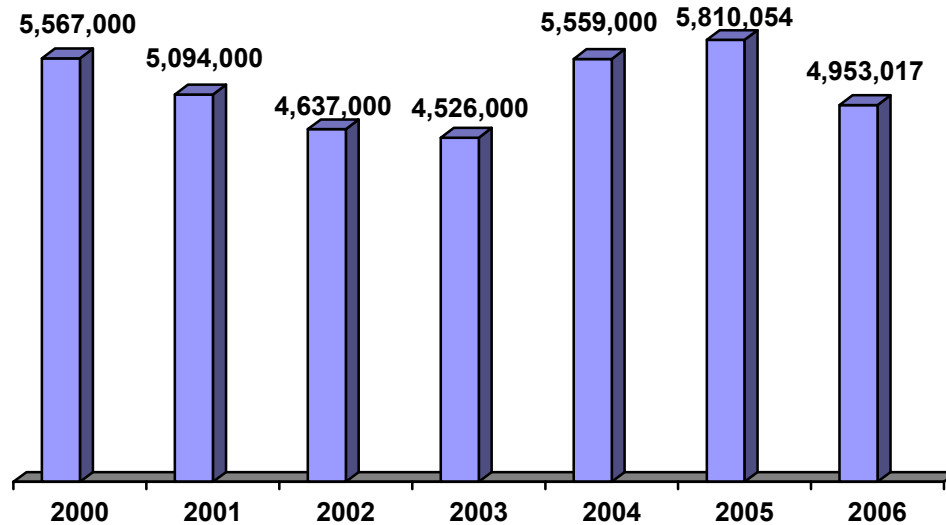
Source: CTC Surveys 1999¹

¹ * Travelled beyond Europe in the past 3 years or seriously intend to in next 2 years.



2.2 Long-haul Market Size

EXHIBIT SECTION 2-2: FRENCH LONG-HAUL¹ TRIPS – 2000 TO 2006



Source: EuroStat

Between 2000 and 2006, long-haul trips out of France decreased by 11.0%. As seen in the chart above, this is not a slow decline, but instead the result of a steeper decline from 2000 to 2003 followed by a steep increase in 2004 and 2005 that did not hold into 2006. It should be noted that total outbound travel over 4 nights or longer dropped between 2005 and 2006, while travel to other Euro Area countries increased during this time.

In 2006, there were 4,953,017 long-haul trips out of France. France is a healthy outbound market, and even at its low point in 2003 had 4.5 million long-haul trips.

¹ Definition used is the sum of outbound trips to the Americas, Asia, Africa, and Oceania.

2.3 Travel Trends

In terms of declared destinations for outbound French travellers, most destinations have been large losers between 2000 and 2006. Africa has seen slight gains in the period, while Asia has shown the start of good growth as a major outbound destination.

North America has fallen by 46.7% as a primary declared destination in this period.

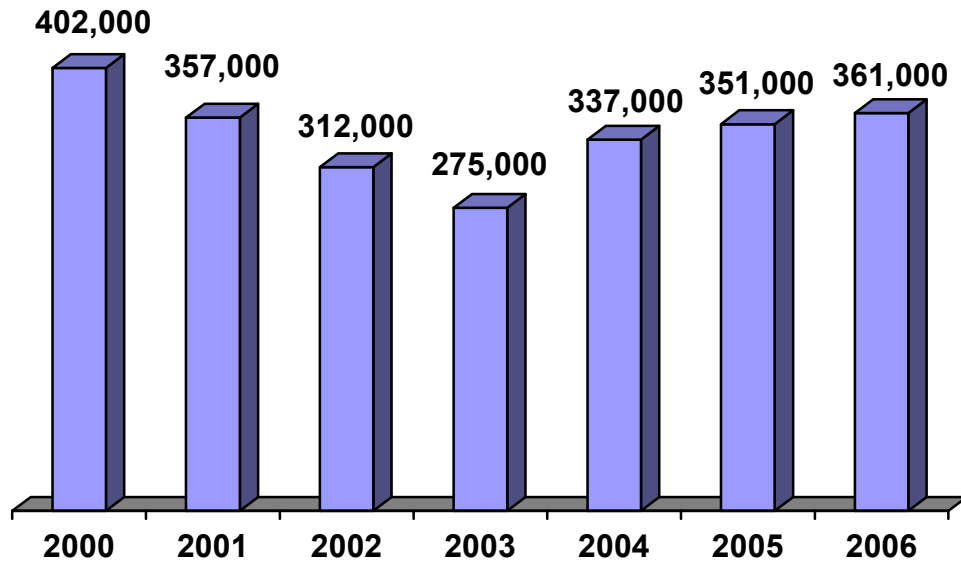
EXHIBIT SECTION 2-3: DESTINATION CHANGES 2000 VS. 2006

	2000	2006	% Change
North America	1,029,000	548,654	-46.7
Central and South America	1,045,000	686,162	-34.3
Africa	2,647,000	2,748,773	+3.8
Asia	717,000	885,548	+23.5
Oceania	129,000	83,880	-35.0

Source: EuroStat

2.4 Arrivals in Canada

EXHIBIT SECTION 2-4: FRENCH TRIPS ARRIVING IN CANADA 2000 TO 2006



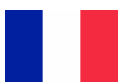
Source: Statistics Canada

Like many source countries, France shows a downward slide from 2000 to 2003, with a strong rebound into 2004 and relative flat performance after that. This low point in 2003 may be related to international events, such as the initiation of the US's war in Iraq. France shows slightly more short term gains than other key markets, but the overall pattern holds.

The change from 2000 to 2006 was -10.2%, which is in line with the overall trends for long haul travel during this time.

Tourist arrival estimates from January to September in 2006 and 2007 show the French arrivals in Canada increasing by 1.9%, going from 299,996 to 305,632.

Since Canada experienced a 10.2% decline from 2000 to 2006, while North America as a region had a 46.7% fall, clearly the loss is primarily with trips to the U.S.



Consumer Surveys – Qualitative and Quantitative Analyses

Section 3: Destination Motivators

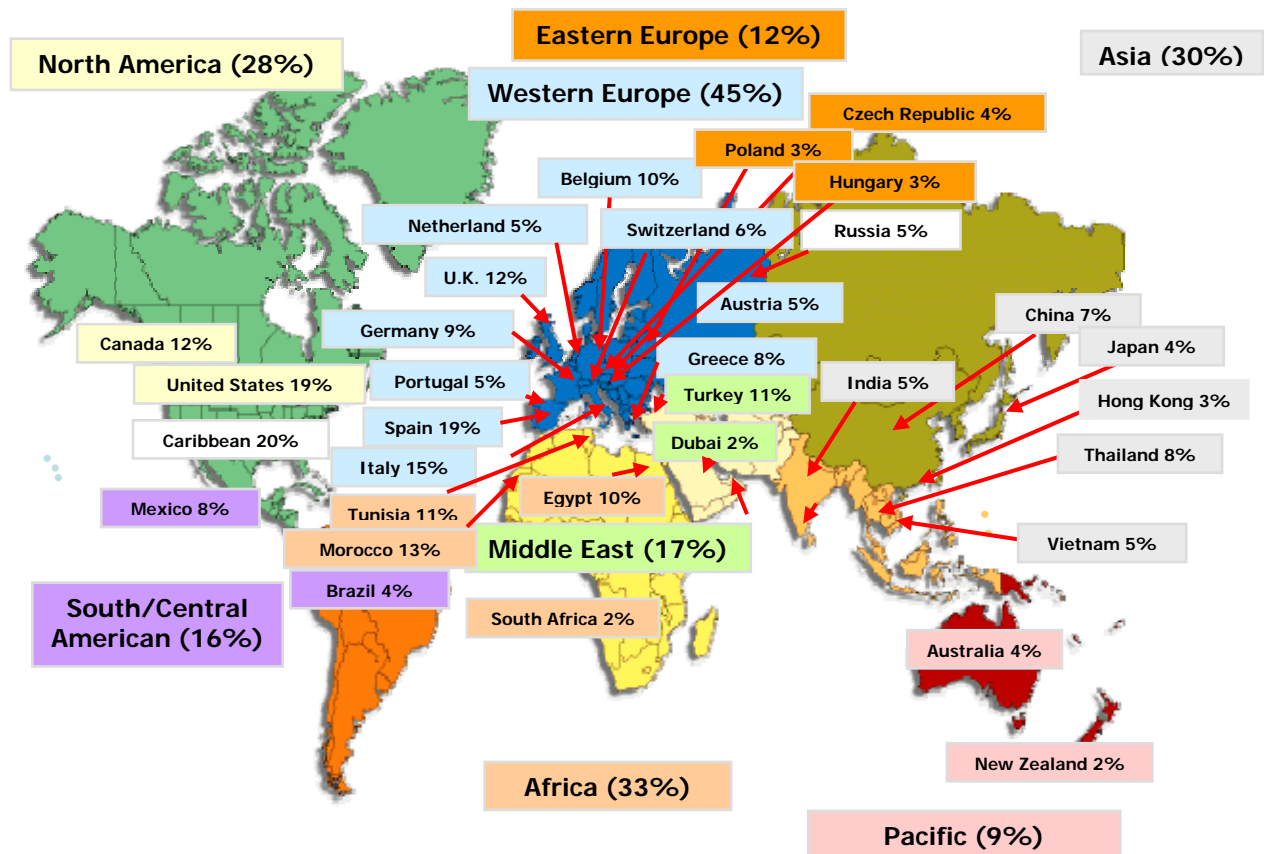
3.1 Current Destinations Outside Home Country (Past 3 Years)

Long-haul travellers take many trips within their own continent—in the past 3 years Western Europe attracted almost half (45%). North Africa is also a common destination. Eastern Europe is considerably less popular (12%).

Among long-haul destinations, Asia (30%) competes with North America (28%) as the two most common continents. However, the French are also drawn to the Caribbean (20%), South/Central America (16%) and the Middle East (17%).

Canada attracted 12% of long-haul French travellers over the past 3 years, not far behind the US at 19%.

EXHIBIT SECTION 3-1: ALL COUNTRIES VISITED IN PAST 3 YEARS BY LONG-HAUL TRAVELLERS



Source: Quantitative Survey Q7¹

¹ Base=Past 3 year long-haul traveller (n=1,749)

Q.7 During the past 3 years which of these countries or destinations outside **France** did you visit for pleasure and stayed for 3 nights or longer with at least one night in paid accommodation, if any?



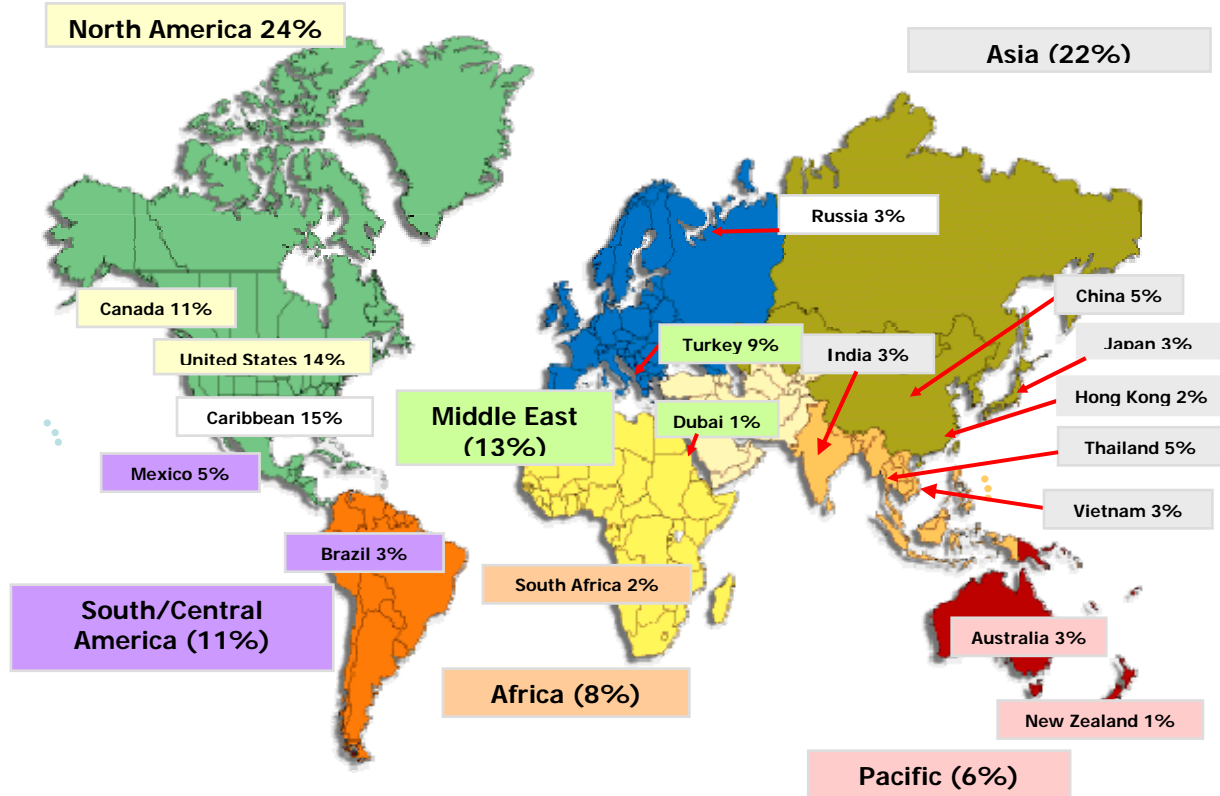
3.2 Long-Haul Destination Market Share

Canada captures 11% of long-haul trips (based on most recent trip data), again just behind the US at 14%.

Beyond North America, the French demonstrate an interest in traveling to a wide range of regions—from Asia (22%), to South/Central America (11%), the Caribbean (15%) and the Middle East (13%).

Since the survey was conducted in the fall, there is a potential bias toward the recent (summer/fall) season travel. However, since travellers typically only take one long-haul trip per year (average for past 3 years under 3 - see Exhibit 6-1), the bias is unlikely to be significant.

EXHIBIT SECTION 3-2: LONG-HAUL COUNTRIES VISITED MOST RECENTLY



Source: Quantitative Survey Q8¹

¹ Base= those who have taken a most recent trip (n=1,749)

Q.8a Thinking about your **most recent** pleasure trip of 3 nights or longer with at least one night in paid accommodation to somewhere **beyond the European Union countries, North Africa and the Mediterranean**, which of these places did you visit on that trip?

3.3 Long-Haul Destination Trends

North America has clearly lost appeal since 1999, the date of the last CTC survey in France.

EXHIBIT SECTION 3-3: DESTINATION TRENDS — MOST RECENT TRIPS

	<u>1999</u>	<u>2007</u>
	%	%
<u>Destination Most Recent Trip</u>		
U.S.	24	14
Caribbean	19	15
Canada	15	11
Other Africa	10	6
Central/South America	10	11
Thailand	8	5
South Africa	4	2
Mexico	4	5
Australia	2	3
China	2	5
Vietnam	2	3
Japan	2	3

Source: CTC survey 1999

3.4 Destination Imagery—Focus Group Feedback

1. Canada's Image

a) Strengths

- ♦ As a backdrop to their needs and attitudes, the French are quite concerned about how their lifestyles have evolved:
 - ♦ *"We are too rushed"*
 - ♦ *"People are rude"*
 - ♦ *"We live in a stressful society"*
 - ♦ *"We are selfish"*
 - ♦ *"Too much pollution"*
- ♦ They also live, for the most part, in small flats or narrow streets – relatively congested.
- ♦ When they think of Canada, their focus is primarily on Quebec, as their travel patterns discussed later confirm. When they imagine Canada, in particular French Canada, they imagine:
 - ♦ *"A simpler life"*
 - ♦ *"Where people are in communion with nature"*
 - ♦ *"It is peaceful, calm"*
 - ♦ *"Gives you a sensation of well being"*
- ♦ The French imagine the lifestyle and environment. It takes them back to their own agrarian roots:
 - ♦ *"It brings back the past"*
 - ♦ *"It reminds us of how it used to be"*
 - ♦ *"Going back to your origins"*
 - ♦ *"Back to your roots"*



3.4 Destination Imagery—Focus Group Feedback

- ♦ That, in turn, helps:
 - ♦ *“Put things into perspective”*
 - ♦ *“You become aware of who you are, your values – you lose sight of yourself in our everyday life”*
- ♦ Nature is unquestionably a big draw of Canada. However, for the French, its role is more of a setting or backdrop to the way of life. Comments on the appeals of Canada reveal the importance of meeting and observing the people.
- ♦ Words used to describe Canada tie it with the concept of revisiting their roots.
 - ♦ *Quaint experiences*
 - ♦ *Old language spoken*
 - ♦ *Peaceful*
 - ♦ *Calm*
 - ♦ *Friendly*
 - ♦ *Have dealt with hardships (nature, winter)*
 - ♦ *Close to nature*
 - ♦ *Woodcutter’s breakfast*
 - ♦ *Trapper’s home*
 - ♦ *Respectful*
 - ♦ *Wide expanse to breathe*
 - ♦ *Sense of humour*



3.4 Destination Imagery—Focus Group Feedback

Words that express the appeal of the country:

- ♦ *Hiking*
- ♦ *Lakes*
- ♦ *Animals*
- ♦ *Space*
- ♦ *Friendliness*
- ♦ *Colours*
- ♦ *Skidoos*
- ♦ *Fire in fireplace*
- ♦ *Stay in a wooden house*
- ♦ *B&B's, do sports with my host*
- ♦ *Bears*
- ♦ *Maple trees*
- ♦ *Untampered*
- ♦ *Kayaking*
- ♦ *Canoeing*
- ♦ *Gaspé*
- ♦ *Dog sledding*
- ♦ The French love the Québécois way of speaking:
 - ♦ *"It is genuine French. We use so many English words like 'parking', they don't"*
 - ♦ *"They sing French, they don't speak it"*



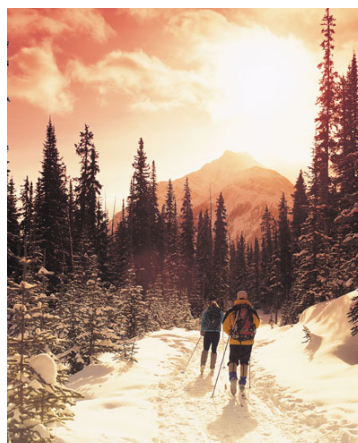
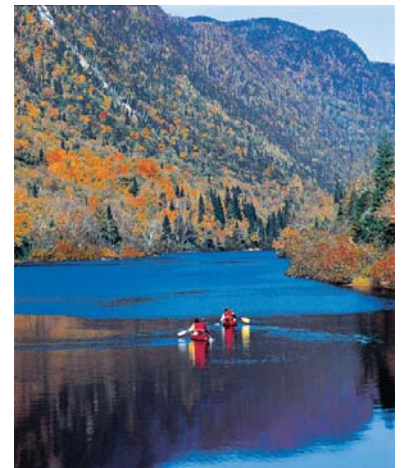
3.4 Destination Imagery—Focus Group Feedback

- ♦ The most appealing images of (French) Canada are:
 - ♦ *“Skidooing”*
 - ♦ *“Trappers cabin”* (i.e., the image of a log cabin)
 - ♦ *“The St. Lawrence”*
 - ♦ *“Warm and welcoming French people”*
 - ♦ *“People talking/eating together”*
 - ♦ *“Story telling”*
 - ♦ *“Relaxing, calm, back to roots feel”*
 - ♦ *“Dog sledding”*
- ♦ In a holistic sense, they want to experience **how nature is linked with the current way of life**.
- ♦ One can learn a great deal about the appeals of a country by understanding what they do **not** want:
 - ♦ *“Big cities – just like a replica of the U.S. I’m not interested in that in Canada. I want to see nature, landscapes. Otherwise, you might as well go to American cities”*
 - ♦ *“Pictures of Old Quebec (too similar to France)”*
- ♦ Clearly, they want a complete change from France.

3.4 Destination Imagery—Focus Group Feedback

b) Picture Sort

- ♦ Provided with a set of 52 images, French travellers gravitated toward 6 specific photographs. Note the absence of cities and the “early settlers” feel of many of the shots.



3.4 Destination Imagery—Focus Group Feedback

c) Canada's Weaknesses

- ♦ Canada undoubtedly will not appeal to all long-haul travellers, as expressed in the following comments:
 - ♦ *"Too cold in winter"*
 - ♦ *"I want something more exotic than Canada. There are only forests and mountains there"*
 - ♦ *"May not be enough hotels"*
 - ♦ *"Too white in winter – nothing to see"*
 - ♦ *"So Americanized"*
- ♦ The sense of vastness, as observed in the U.K., is also a perceptual barrier:
 - ♦ *"There is so much to see, I'm feeling lost. I need help (planning)"*

2. Barriers to Canada

- ♦ The primary barrier to holidaying in Canada among the French is that Canada has not been positioned correctly to capture the underlying motivation to travel to Canada.
- ♦ Current brochures and ads focus on natural scenery, outdoor activity, Montreal and Quebec City, but that is not the core emotional driver to visit Canada. These images do not portray enough the underlying desire to experience French Canadian culture, and get in touch with their own past and roots.
- ♦ In all six groups in France, among past and prospective travellers, the motivators for travel to Canada were incredibly consistent.



3.4 Destination Imagery—Focus Group Feedback

3. Building a Better Product

a) The Ideal Trip

- ♦ When describing their ideal trip to Canada, most focus on French Canada. However, as discussed later, there is interest in other regions, mainly on subsequent trips.
- ♦ *“I would fly to Montreal, rent a car and travel down the St. Lawrence to Gaspé. Meet local people, see the whales”*
- ♦ *“Autumn, 12-14 days, Quebec to Montreal to Lac St. Jean to St. Lawrence. See wide open spaces, Indian reserves on an organized tour”*
- ♦ *“Go up the St. Lawrence River, start and finish in Montreal. Find a nice little bar on the way back”*
- ♦ *“Live in a wooden house like a Canadian. Try to live the way they do”*
- ♦ *“Stay in a typical Canadian village with a forest in the background”*
- ♦ *“Fly to Montreal, rent a car, stay at B&B’s where you can meet the people. If the B&B is full, they will tell us where else to go”*
- ♦ *“Montreal eastward, canoeing on lakes, fishing, having a trapper’s meal, hiking”*
- ♦ *“Mobile home, 3 weeks, spend a day or two in Montreal, travel to Quebec, hiking, discovering the warm people, lunch in Montreal”*

3.4 Destination Imagery—Focus Group Feedback

- ♦ While experiencing French Canadian culture and the natural environment in which they live is the dominant product desired, after reviewing the brochures, others express interest in seeing other provinces.
 - ♦ *“I want to see the rest of the country that our French cousins live in”*
 - ♦ *“I’d start in Toronto, see Niagara Falls, then down the St. Lawrence, stay in a trapper’s cabin, campfire, 10 to 12 days”*
 - ♦ *“One week in Toronto, one week in Montreal, cruise on the St. Lawrence, rent a car”*
 - ♦ *“A completely organized tour – Niagara to the Gaspé, nature, different natural parks, Huron villages, one night with local people would be enough (to get a taste of it) the rest in hotels”*
- ♦ On subsequent repeat trips to Canada, many express an interest in seeing Western Canada:
 - ♦ Vancouver
 - ♦ The Rockies
 - ♦ Train
 - ♦ Cruise up to Alaska
- ♦ A common experience:
 - ♦ *“I see Western Canada as a separate trip, Quebec in the first trip, Western Canada on the next”*



3.4 Destination Imagery—Focus Group Feedback

b) The Perfect Day

- ♦ When describing the “perfect day” in Canada, the desire to smell the fresh air, feel the lifestyle and engage with the French Québécois is very clear:
 - ♦ *“Get up early, have a ‘woodcutter’s breakfast’ and set off to discover”*
 - ♦ *“Getting up really early and living the whole day at the pace of nature”*
 - ♦ *“Walking around in the woods, eating our meals with a trapper who would be teaching us about nature”*
 - ♦ *“Our ancestors came from France 350 years ago. Let us show you our country and our way of life”*

c) Existing Brochures

- ♦ Group participants were given for review a range of French market package brochures featuring Canada.
- ♦ They first used them to help create their ideal trip (discussed earlier) and then were asked to what degree this existing “product” reflected their needs.
- ♦ The brochures were praised for providing beautiful nature photography and providing itinerary ideas.
- ♦ However, what appear to be lacking are opportunities to get close to the local French people. They want more about:
 - ♦ *“B&B’s*
 - ♦ *“Photo’s of locals conversing with the French”*
 - ♦ *“These pictures seem too scenery focused and not enough adventure – too quiet”*
 - ♦ *“Good restaurants and infrastructure”*



3.4 Destination Imagery—Focus Group Feedback

- ♦ *“But not images of monuments, vineyards and city buildings that are common in France”*
- ♦ *“The images must re-assure infrastructure is there, but in a way which is unique to Canada”*
- ♦ Testimony to the excellent nature photography is that many appetites were whetted by scenes of Western Canada and the opportunity to visit there on subsequent trips.

8. The Olympics 2010

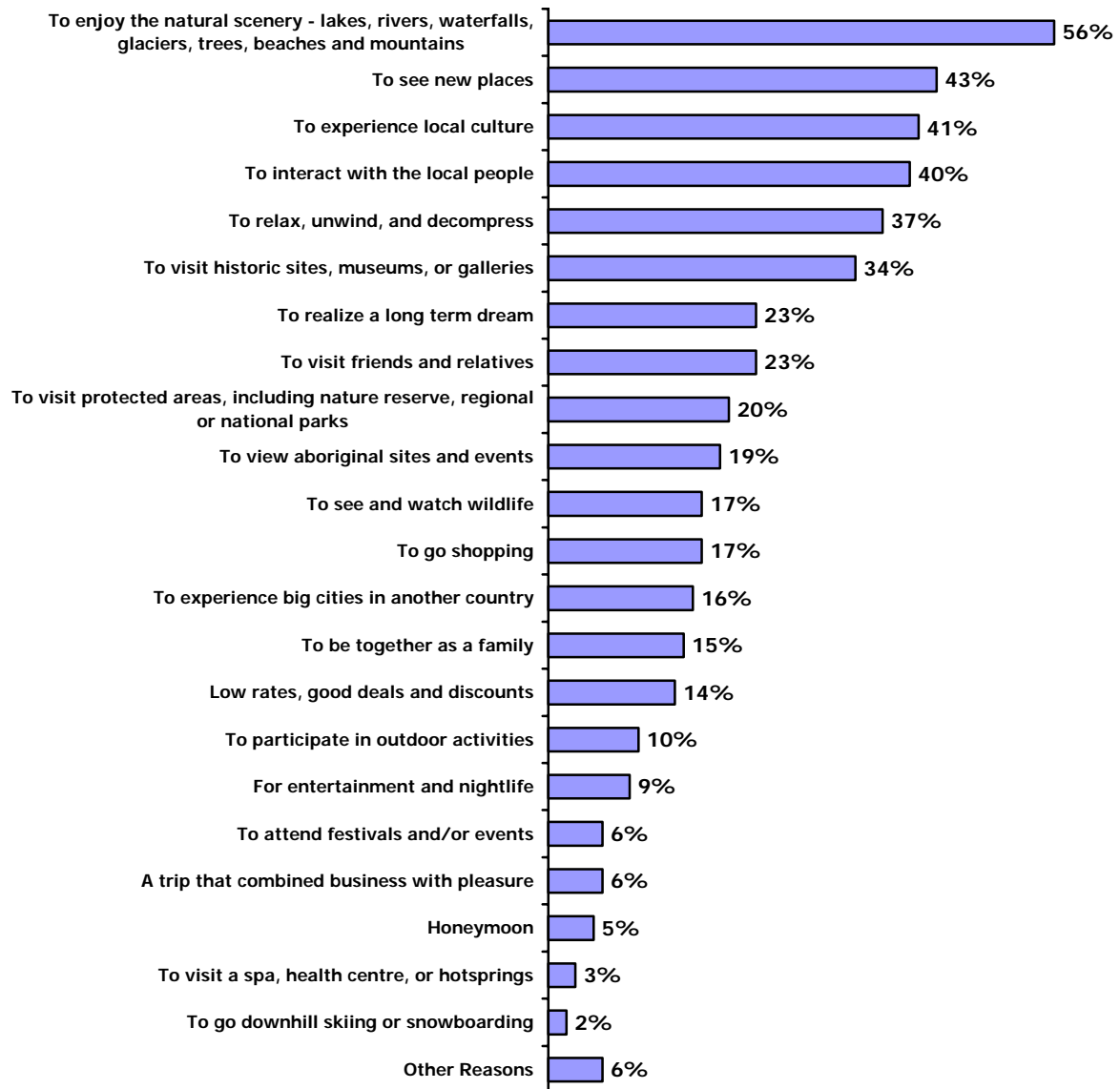
- ♦ Respondents in all three markets had the same opinion of the Olympics in 2010:
 - ♦ There is very little interest in visiting during the Olympics due to crowds, high prices, etc.
- ♦ However, they do provide an opportunity to showcase Canada through film footage, on television during the Games. However, a note of caution:
 - ♦ Footage should cover the summer season as well as the winter.
 - ♦ Great care must be made to re-enforce that Canada in many seasons is warm.
 - ♦ Footage should re-enforce the research learning – that the Canadian vacation experience provides a balanced and memorable vacation experience – beyond just nature but including first class amenities in natural surroundings, an interesting unique culture and activities for all ages.

3.5 Purpose of Trip - All

The destination drivers for the French are led by natural attractions, but right on their heels are experiencing local culture and interacting with people.

EXHIBIT SECTION 3-4: ALL REASONS FOR TRAVEL – BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.9a¹

¹ Base=n=1,749

Q.9a What were your reasons for travelling to (Q.8a DESTINATION)



3.6 Purpose of Trip – All – By Destination

Beyond nature, interacting with the local people is clearly the dominant reason for visiting Canada for the French, confirming qualitative findings.

Canada also scores high on to see new places.

EXHIBIT SECTION 3-5: ALL REASONS FOR TRAVEL – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
All Reasons for Taking Trip				
To enjoy the natural scenery – lake, rivers, waterfalls, glaciers, trees, beaches and mountains	59	55	52	78
To see new places	43	46	46	53
To experience local culture	58	29	38	44
To interact with the local people	53	35	33	61
To relax, unwind, and decompress	25	68	23	33
To visit historic sites, museums, or galleries	51	14	34	35
To realize a long term dream	24	18	32	35
To visit friends and relatives	19	20	32	32
To visit protected areas, including nature reserve, regional or national parks	18	18	31	44
To view aboriginal sites and events	30	14	13	24
To see and watch wildlife	13	19	11	38
To go shopping	21	11	39	25
To experience big cities in another country	22	6	41	28
To be together as a family	10	18	14	19
Low rates, good deals, and discounts	14	18	12	7
To participate in outdoor activities	7	17	5	15
For entertainment and nightlife	9	6	20	11
To attend festivals and/or events	8	3	7	16
A trip that combined business with pleasure	9	2	10	8
Honeymoon	3	9	2	4
To visit a spa, health centre, or hot springs	6	4	1	3
To go downhill skiing or snowboarding	3	1	1	5
Other reasons	3	6	6	5

Source: Quantitative Survey Q.9a

Q.9a What were your reasons for travelling to (Q.8a DESTINATION)

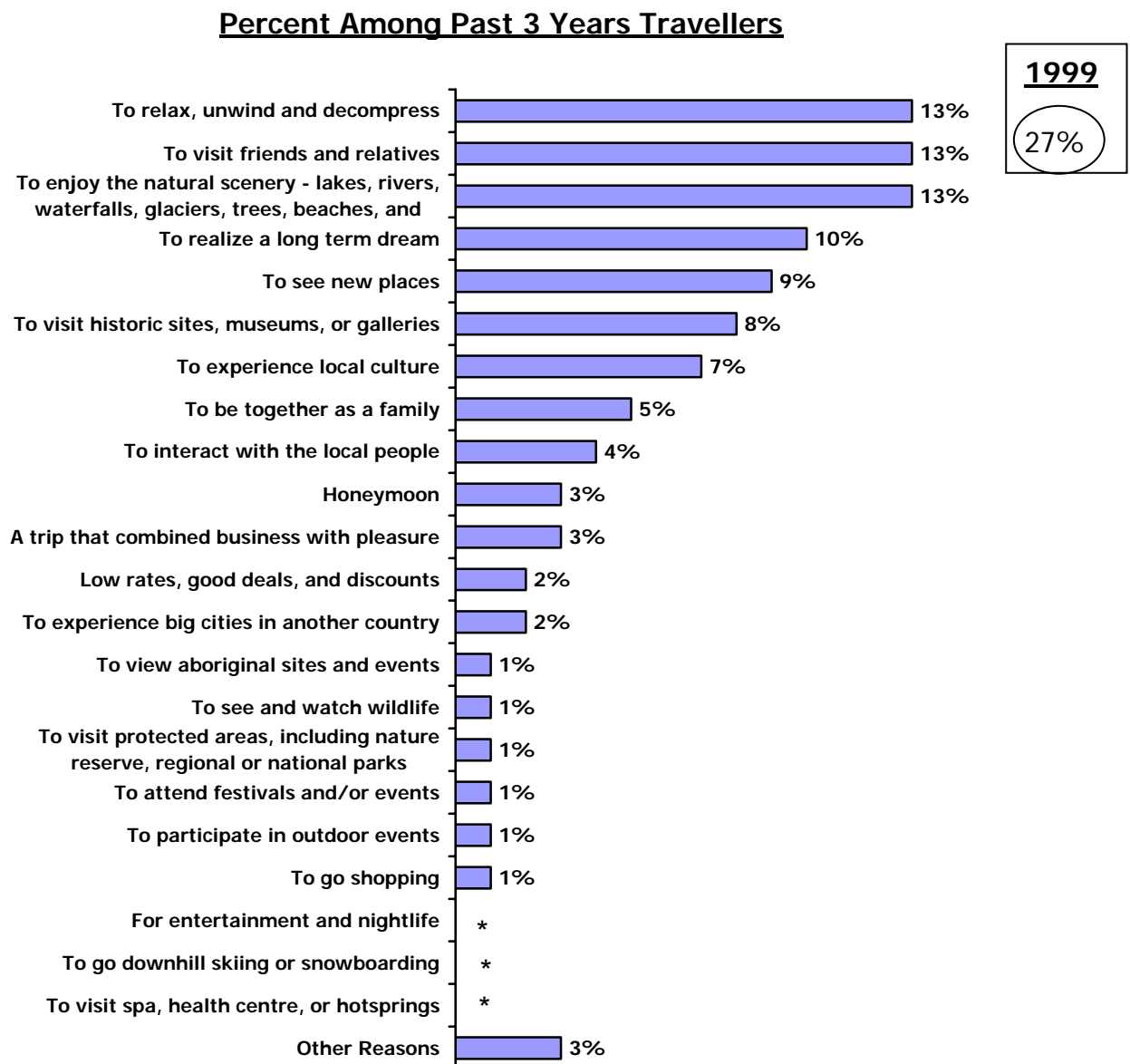


3.7 Purpose of Trip – Main

The French have 3 core reasons for travelling, testimony to their diverse destination choices discussed earlier—to relax, unwind and decompress, VFR and to enjoy nature.

Note that VFR travel is much lower now (13%) than in 1999 (27%).

EXHIBIT SECTION 3-6: MAIN PURPOSE OF TRIP – BY ALL DESTINATIONS



Source: Quantitative Survey Q.9b¹

¹Base n=1,749

Q. 9b Which of those was your **main reason** for travel?

*Less than 0.5%



3.8 Purpose of Trip – Main – By Destination

To enjoy nature, VFR and to realize a long term dream are the chief reasons for visiting Canada. The US is less about nature and more about seeing new places.

EXHIBIT SECTION 3-7: MAIN PURPOSE OF TRIP – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
Main Reason for Taking Trip				
To relax, unwind, and decompress	6	38	3	2
To visit friends and relatives	9	9	19	19
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	14	10	14	30
To realize a long term dream	10	8	16	13
To see new places	9	9	12	6
To visit historic sites, museums, or galleries	10	2	2	1
To experience local culture	14	1	3	4
To be together as a family	6	5	6	4
To interact with the local people	9	3	1	3
Honeymoon	2	6	2	2
A trip that combined business with pleasure	4	2	6	4
Low rates, good deals, and discounts	1	3	2	*
To experience big cities in another country	2	-	6	1
To view aboriginal sites and events	2	1	-	1
To see and watch wildlife	1	1	-	1
To visit protected areas, including nature reserve, regional or national parks	*	-	2	1
To attend festivals and/or events	1	1	1	1
To participate in outdoor activities	*	2	-	1
To go shopping	1	1	1	*
For entertainment and nightlife	--	-	2	*
To go downhill skiing or snowboarding	-	-	-	*
To visit a spa, health centre, or hot springs	-	-	-	-
Other reasons	1	1	3	3

Canada
1999
20%

Source: Quantitative survey Q.9b

*Less than 0.5%

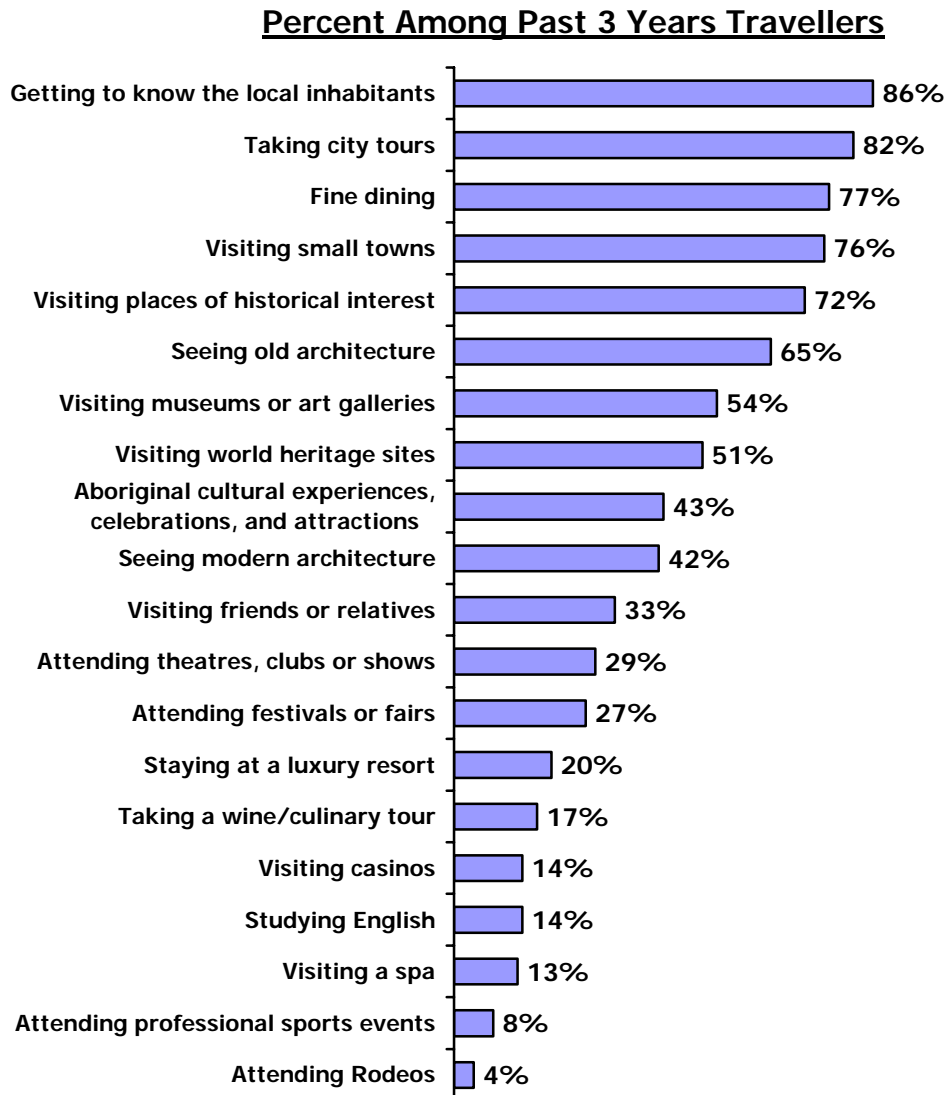
Q. 9b Which of those was your **main reason** for travel?



3.9 Destination Activities – Culturally Oriented

Culturally dominated activities for French travellers include immersing themselves in local culture and seeing the way people live today and in the past. Clearly, food (fine dining) is also important to the French.

EXHIBIT SECTION 3-8: ACTIVITIES PARTICIPATED ON TRIP – CULTURALLY ORIENTED – BY ALL DESTINATIONS



Source: Quantitative Survey Q.19a¹

¹ Base: n=1,749

19a) Which, if any, of the following activities did you participate in while on that trip to (DESTINATION IN Q. 8a)

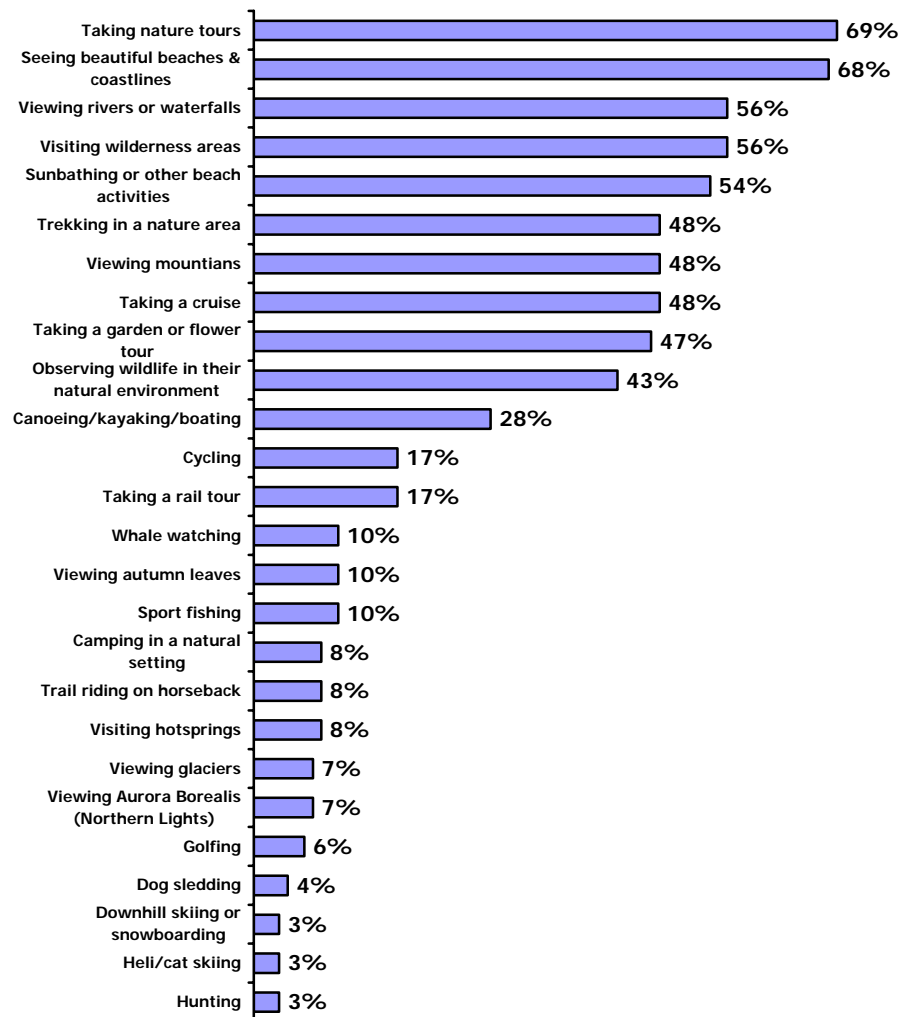


3.10 Destination Activities – Nature Oriented

On the nature side, viewing and observing, as well as relaxing in the sun out weigh more active soft adventure.

EXHIBIT SECTION 3-9: ACTIVITIES PARTICIPATED ON TRIP – NATURE ORIENTED – BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19a¹

¹Base: n=1,749

19a Which, if any, of the following activities did you participate in while on that trip to (DESTINATION IN Q. 8a)



3.11 Destination Activities – Culturally Oriented – by Destination

With culturally oriented activities, French travellers to Canada show particular interest in visiting small towns, seeing evidence of early civilization and getting to know local inhabitants.

EXHIBIT SECTION 3-10: ACTIVITIES PARTICIPATED ON TRIP – CULTURALLY ORIENTED – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
<u>Culturally Oriented Activities Participated In</u>				
Getting to know the local inhabitants	84	84	84	89
Taking city tours	84	73	83	87
Fine dining	81	78	83	79
Visiting small towns	80	76	57	76
Visiting places of historical interest	83	52	73	77
Seeing old architecture	80	47	50	64
Visiting museums or art galleries	67	34	66	61
Visiting world heritage sites	68	32	50	56
Aboriginal cultural experiences, celebrations, and attractions	52	36	40	41
Seeing modern architecture	53	17	76	69
Visiting friends or relatives	30	28	46	48
Attending theatres, clubs or shows	40	27	38	30
Attending festivals or fairs	33	20	32	39
Staying at a luxury resort	21	28	14	12
Taking a wine/culinary tour	19	27	10	20
Visiting casinos	11	18	36	16
Studying English	16	4	38	19
Visiting a spa	19	15	7	11
Attending professional sports events	13	6	16	14
Attending rodeos	5	2	9	7

Source: Quantitative Survey Q.19a

3.12 Destination Activities – Nature Oriented – By Destination

Observing nature is unquestionably where Canada excels vis-à-vis other destinations, especially viewing rivers, waterfalls, wilderness areas, mountains, wildlife, whales, autumn leaves. Among soft adventure, trekking leads.

EXHIBIT SECTION 3-1 1: ACTIVITIES PARTICIPATED ON TRIP – NATURE ORIENTED – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
<u>Nature Oriented Activities Participated In</u>				
Taking nature tours	67	74	61	77
Seeing beautiful beaches and coastlines	58	93	50	44
Viewing rivers or waterfalls	63	59	51	82
Visiting wilderness areas	57	57	47	70
Sunbathing or other beach activities	41	88	30	23
Trekking in a nature area	45	49	41	64
Viewing mountains	57	42	46	68
Taking a cruise	51	56	35	46
Taking a garden or flower tour	60	53	46	47
Observing wildlife in their natural environment	37	45	40	67
Canoeing/kayaking/boating	26	44	14	30
Cycling	24	19	18	21
Taking a rail tour	38	8	16	15
Whale watching	7	12	7	38
Viewing autumn leaves	10	3	17	32
Sport fishing	9	17	8	15
Camping in a natural setting	7	4	7	9
Trail riding on horseback	9	10	7	11
Visiting hot springs	12	6	4	8
Viewing glaciers	10	1	9	20
Viewing Aurora Borealis (Northern Lights)	10	8	6	11
Golfing	8	4	8	6
Dog sledding	6	3	5	16
Downhill skiing or snowboarding	5	3	3	8
Heli/cat skiing	6	2	4	8
Hunting	5	1	2	5

Source: Quantitative Survey Q.19a

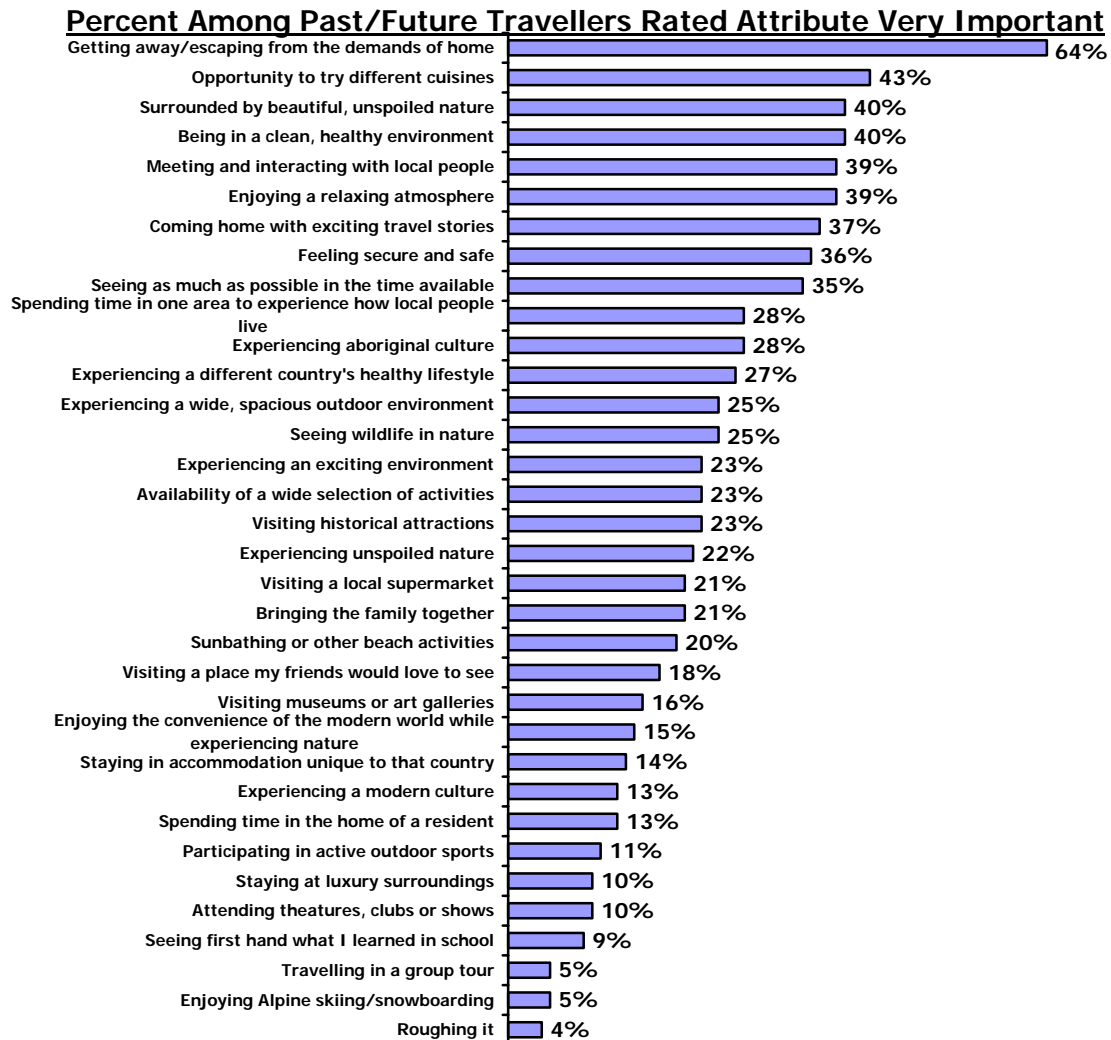
19a Which, if any, of the following activities did you participate in while on that trip to
(DESTINATION IN Q. 8a)



3.13 Importance of Attributes in Destination Selection

This chart ranks 34 destination selection attributes on importance.

EXHIBIT SECTION 3-12: IMPORTANCE OF ATTRIBUTE IN DESTINATION SELECTION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.20-¹

¹ Base=n=2,544

Q.20 Please imagine that you are taking an overseas pleasure trip **beyond the European Union countries, North Africa and the Mediterranean** for 3 nights or longer with at least one night in paid accommodation. For each statement on this page check one box to show how important that reason is to you when considering such a trip.



3.14 Destination Rating

The destination ratings provide a clear view of Canada's strengths and weaknesses vis-à-vis its three primary competitors.

EXHIBIT SECTION 3-13: CANADA'S STRENGTHS AND WEAKNESSES VS. COMPETITORS

	Vs. U.S.	Vs. Australia	Vs. South East Asia
Canada's Strengths	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Experiencing unspoiled nature • Surrounded by beautiful, unspoiled nature • Seeing wildlife in nature • Experiencing a country's healthy lifestyle • Visiting small towns • Wine/culture tours • Interact with local people 	<ul style="list-style-type: none"> • Being in a clean, healthy environment • Feeling safe and secure • Enjoying Alpine (downhill) skiing or snowboarding • Experiencing a country's healthy lifestyle 	<ul style="list-style-type: none"> • Experience a wide, spacious outdoor environment • Being in a clean, healthy environment • Surrounded by beautiful, unspoiled nature • Feeling secure and safe • Experiencing unspoiled nature • Experiencing a wide, spacious outdoor environment • Seeing wildlife in nature • Enjoying the convenience of the modern world while experiencing nature • Participating in active outdoor sports • See modern architecture
Canada's Weaknesses	<ul style="list-style-type: none"> • Experiencing a modern culture • Attending theatre, clubs, shows • Staying at luxury surroundings • Visiting museums or art galleries 	<ul style="list-style-type: none"> • Experiencing aboriginal culture • Sunbathing or other beach activities 	<ul style="list-style-type: none"> • Sunbathing or other beach activities • Opportunity to try different cuisines
Summary	<ul style="list-style-type: none"> • Canada is way ahead in terms of a natural environment • But the U.S. is better known for its modern, urban cultural 	<ul style="list-style-type: none"> • Australia has marketed its aboriginal tourism far better than Canada and provides more of a sun destination 	<ul style="list-style-type: none"> • Canada is far ahead in experiencing a wide, spacious, natural environment. • S.E. Asia offers sun and exotic cuisine

3.14 Destination Rating

EXHIBIT SECTION 3-14: DESTINATION RATING

	Among Those Who Claimed Each Attribute Very/Somewhat Important When Considering a Trip			
	S.E. Asia	Australia	U.S.	Canada
	%	%	%	%
<u>Attribute Applies Extremely Well to Each Destination*</u>				
Getting away/escaping from the demands of home	46	56	28	51
Opportunity to try different cuisines	73	55	36	55
Surrounded by beautiful, unspoiled nature	27	60	28	68
Being in a clean, healthy environment	12	41	28	69
Meeting and interacting with local people	60	58	45	64
Enjoying a relaxing atmosphere	36	40	12	50
Coming home with exciting travel stories	61	62	52	57
Feeling secure and safe	22	45	38	65
Seeing as much as possible in the time available	47	46	52	48
Spending time in one area to experience how local people live	61	51	33	52
Experiencing aboriginal culture	62	49	17	31
Experiencing a different country's healthy lifestyle	33	45	24	61
Experiencing a wide, spacious outdoor environment	22	69	49	71
Seeing wildlife in nature	24	65	18	52
Experiencing an exciting environment	45	53	42	47
Availability of a wide selection of activities	33	49	56	57
Visiting historical attractions	51	42	49	48
Experiencing unspoiled nature	25	60	20	64
Visiting a local supermarket	64	45	33	48
Bringing the family together	25	33	31	45
Sunbathing or other beach activities	38	53	32	15
Visiting a place my friends would love to see	41	51	39	47
Visiting museums or art galleries	35	37	66	48
Enjoying the convenience of the modern world while experiencing nature	21	51	35	62
Staying in accommodation unique to that country (e.g., guest ranch, lodge, etc.)	39	50	51	58
Experiencing a modern culture	20	34	59	42
Spending time in the home of a resident	43	44	29	55
Participating in active outdoor sports	20	47	34	54
Staying at luxury surroundings	32	38	62	43
Attending theatres, clubs or shows	27	34	60	43
Seeing first hand what I learned in school	26	30	39	35
Travelling in a group tour	43	45	42	48
Enjoying Alpine (downhill) skiing or snowboarding	12	24	33	52
Roughing it	31	25	16	30

Source: Quantitative Survey Q.21

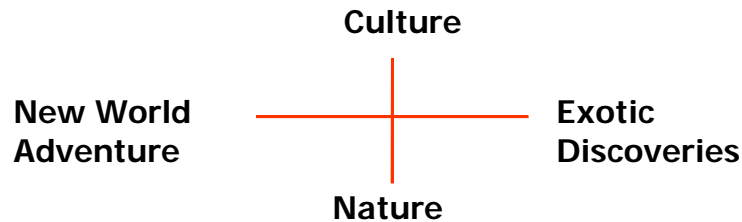
Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, experiences or anything else that you have seen, heard or read.

* In order of importance when deciding an overseas pleasure trip (Q.20)



3.15 Perceptual Brand Map

The Correspondence Analysis on the next page correlates destination imagery ratings on two computer driven axes:



Each of the attributes is plotted on the map with the positioning of each destination. The map, through multivariate analysis, illustrates the relative position of each destination and each attribute, based on their ratings on each. In other words, the more a particular destination is uniquely associated with an attribute the closer it is charted to it.

The map should be interpreted in a “big picture” sense — which groups of attributes are most related to which areas of the map; in turn, which countries are most associated with these areas.

Part of the map interpretation is to see if there is any continuum as one moves from left to right or top to bottom. It is a subjective interpretation of the chart pattern, New World Adventure is chosen because the attributes associated with North America are on the left side of the chart, while the attributes that are more SE Asia and Southern Hemisphere related tend to fall on the right hand side. The attributes with a cultural component tend to fall towards the top and those with a nature component tend to fall towards the bottom, hence the interpretation of the vertical axis.

Note that the map is created based on the interaction of all the attributes with the four countries; the interpretation of the axes emerges from the map after it has been created.

Brand Positioning

U.S.A

This country dominates the Northwest sector and is strongly associated with modern, urban culture, luxury and a wide variety of activities.



3.15 Perceptual Brand Map

S.E. Asia

In the Northeast quadrant, SE Asia is associated with sun, beaches and different cuisines.

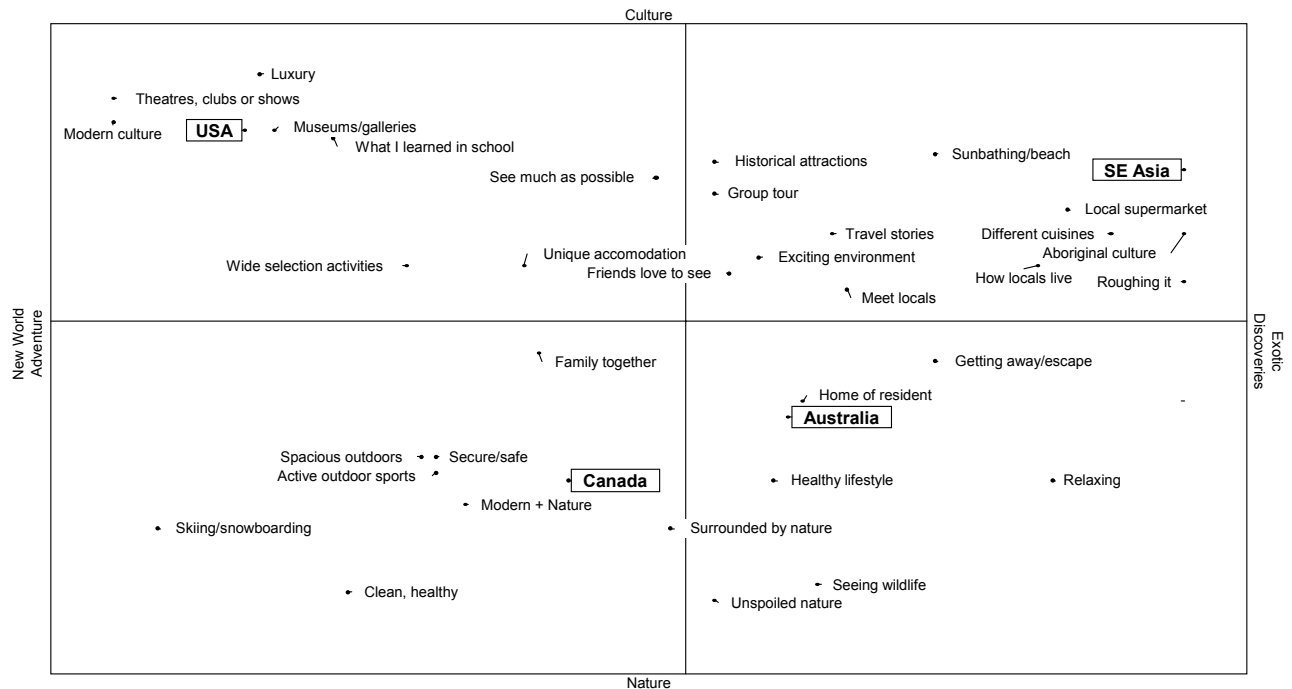
Canada

Canada is fairly central in the southern quadrants—pulled west by the association with outdoor activities and drawn east by the more passive nature observation.

Australia

This country, a relatively minor destination for the French, is on the nature side (south) but more east, associated with relaxation in a natural setting.

EXHIBIT SECTION 3-15: BRAND ATTRIBUTE MAP



Source: Quantitative survey Q.21

Q.21 Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, experiences, or anything else that you have seen, heard or read.

3.16 France--Product Benefit Laddering

To further probe traveller motivation, Insignia used their **Inner Consciousness Laddering Model** to draw out the “higher order” benefits that travellers are seeking in a Canadian vacation.

The hierarchy process:

- Begins with fundamental products or activities sought;
- Then uncovers the benefits sought by experiencing those products/activities;
- And finally, at the highest level, the personal values that are being fulfilled by the experiences.

For the French, the Canadian vacation experience at the product/activity level is primarily nature focused along with interest in the (French) Canadian way of life.

At the Benefits level, these nature and personal experiences lead to:

- Connection to the past, a time of different values
- Engaging in a calmer society
- Release of stress
- Reconnection with one's self

At the highest order, the Value received is:

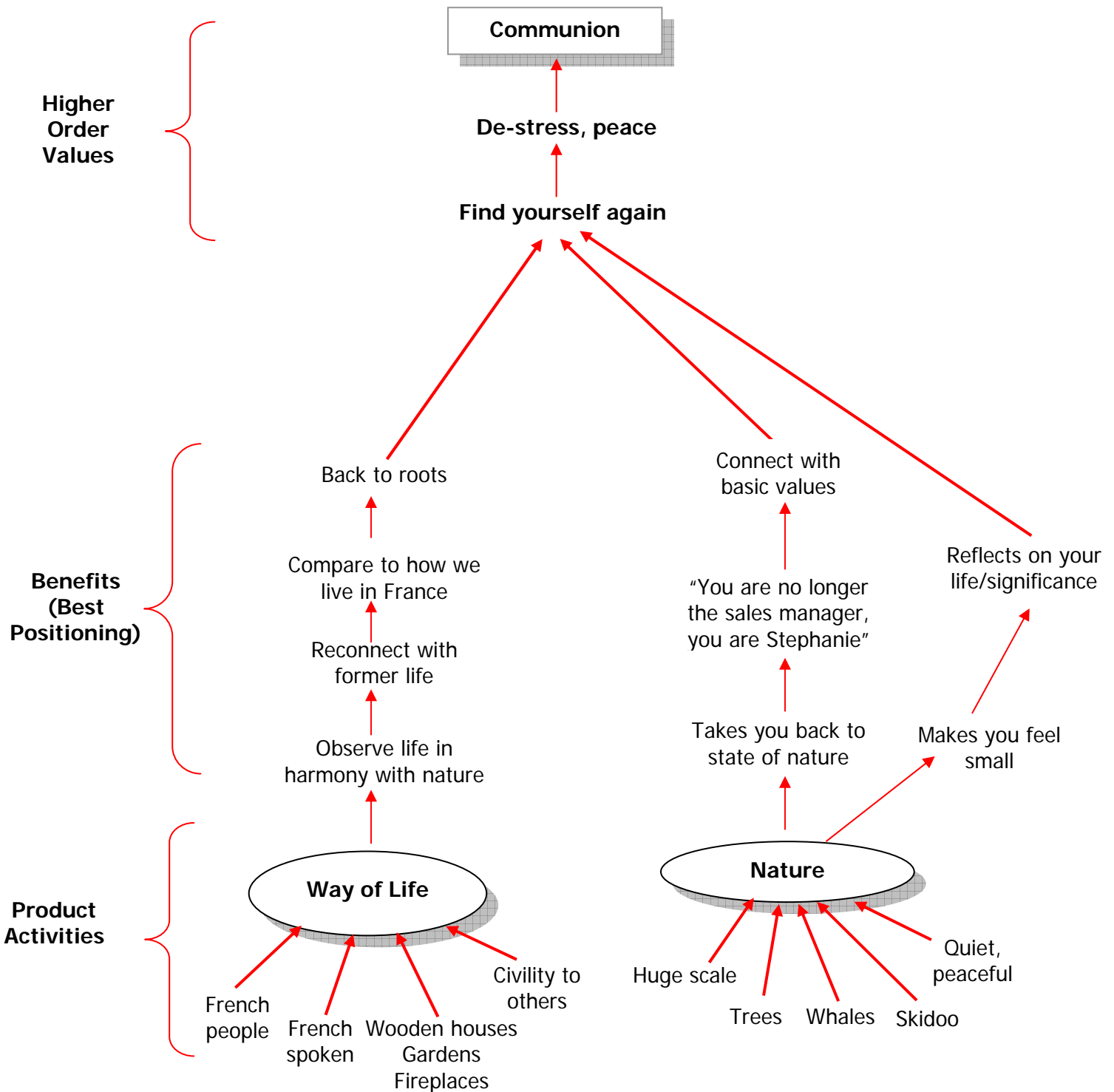
- Communion and harmony with nature and self

Implications

The best way to position Canada's natural and cultural products is to focus on the physical and emotional rewards that they provide.



3.17 France--Product Benefit Laddering

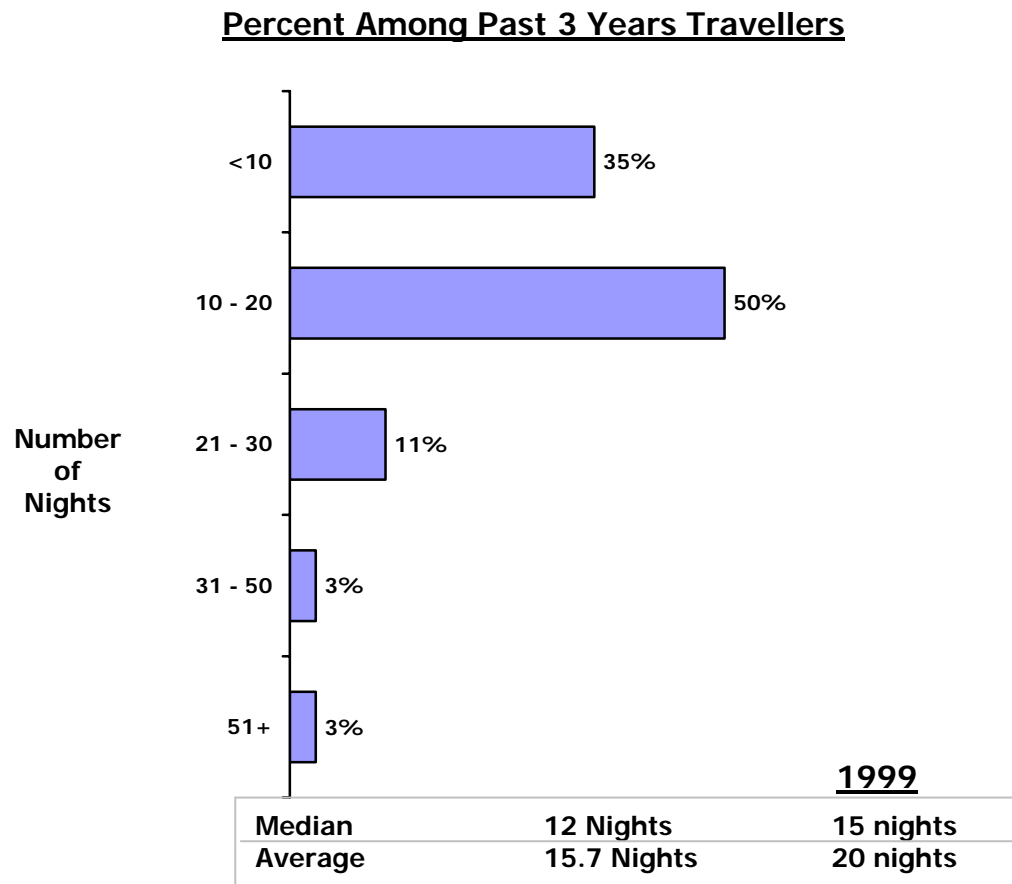


Section 4: Destination Trip Profile

4.1 Duration

The average long-haul trip lasts 15.7 nights for the French. Very few are 3 weeks or longer (17%). Trips today are even shorter than 1999 (20 nights away)

EXHIBIT SECTION 4-1: NUMBER OF NIGHTS AWAY FROM HOME — BY ALL DESTINATIONS



Source: Quantitative Survey Q.10a¹

¹ Base: n=1,749

Q.10a On that trip to **(Q. 8a) DESTINATION** how many nights, in total, were you away from home?



4.2 Duration – By Destination

The average duration of a trip to Canada is 20.9 nights, quite typical of journeys to the US and Asia.

Some visit the US as well as Canada on their journey, as discussed later. However, Canada on average captures 15.5 nights out of 20.9 away from home.

EXHIBIT SECTION 4-2: NUMBER OF NIGHTS AWAY FROM HOME – BY DESTINATION

	Percent Among Travellers Visiting Each				
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %	
<u>Number of Nights</u>					
<10	28	33	28	25	
10 – 20	50	55	54	53	
21 – 30	14	8	12	13	
31 – 50	4	2	4	4	
51+	4	3	2	6	
Median of nights	13	13	13	14	Canada 1999 13
Average # of nights	17.7	15.1	17.2	20.9	18.0

Source: Quantitative Survey Q.10a



<u>Nights Spent in Canada</u>	
	#
Median	11
Average	15.5

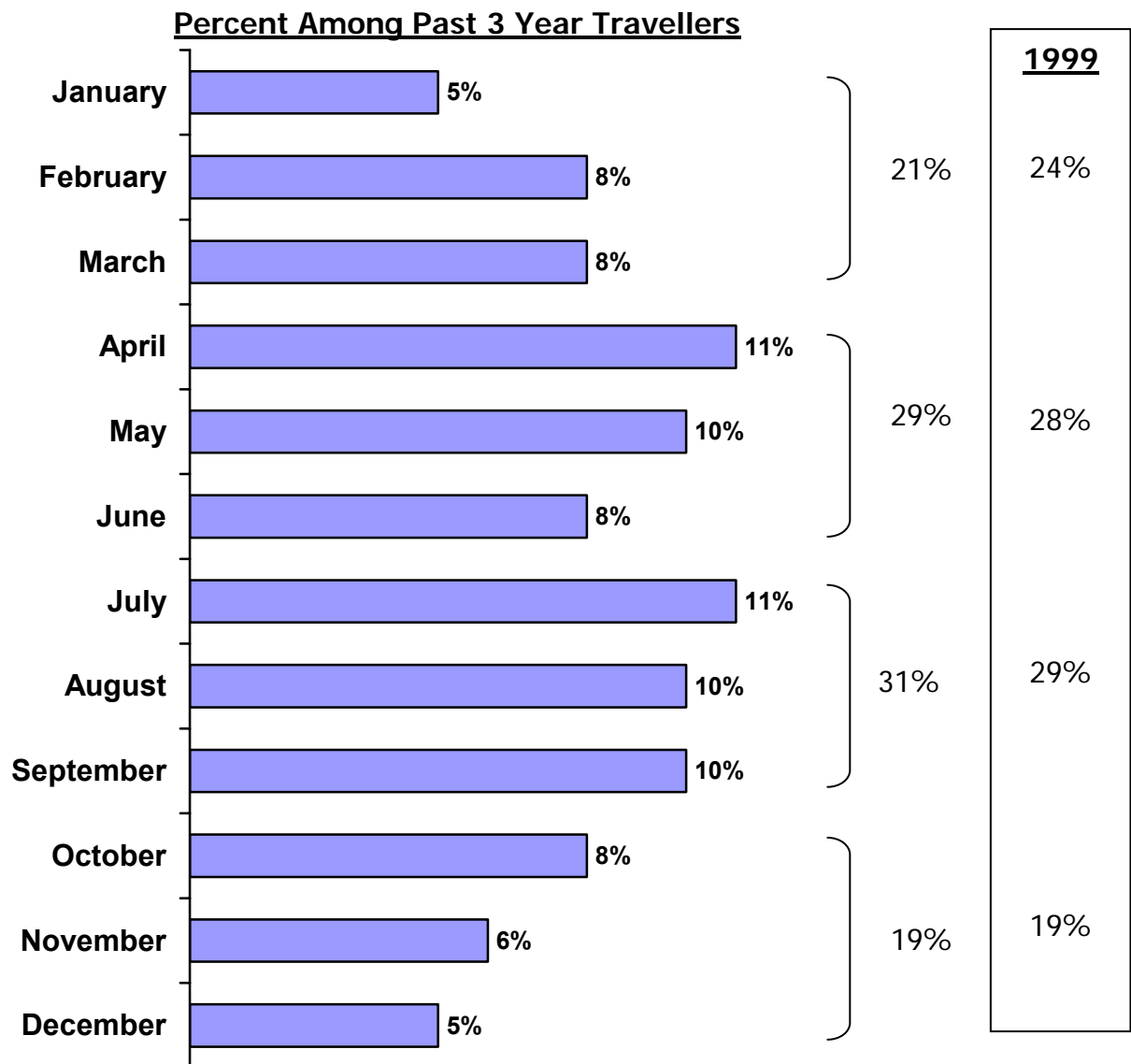
Q.10a On that trip to (Q. 8a) **DESTINATION** how many nights, in total, were you away from home?

Q.10b **(IF CANADA IN Q.8a, ASK)** How many nights, in total, did you spend in Canada?

4.3 Time of Travel

The French prefer to travel between April and September (60%). This pattern has not changed from 1999 (57%)

EXHIBIT SECTION 4-3: MONTH OF TRAVEL — BY ALL DESTINATIONS



Source: Quantitative Survey Q.11¹

¹ Base=n=1,749

Q.11 And when did you take that trip to (DESTINATION IN Q.8a)?



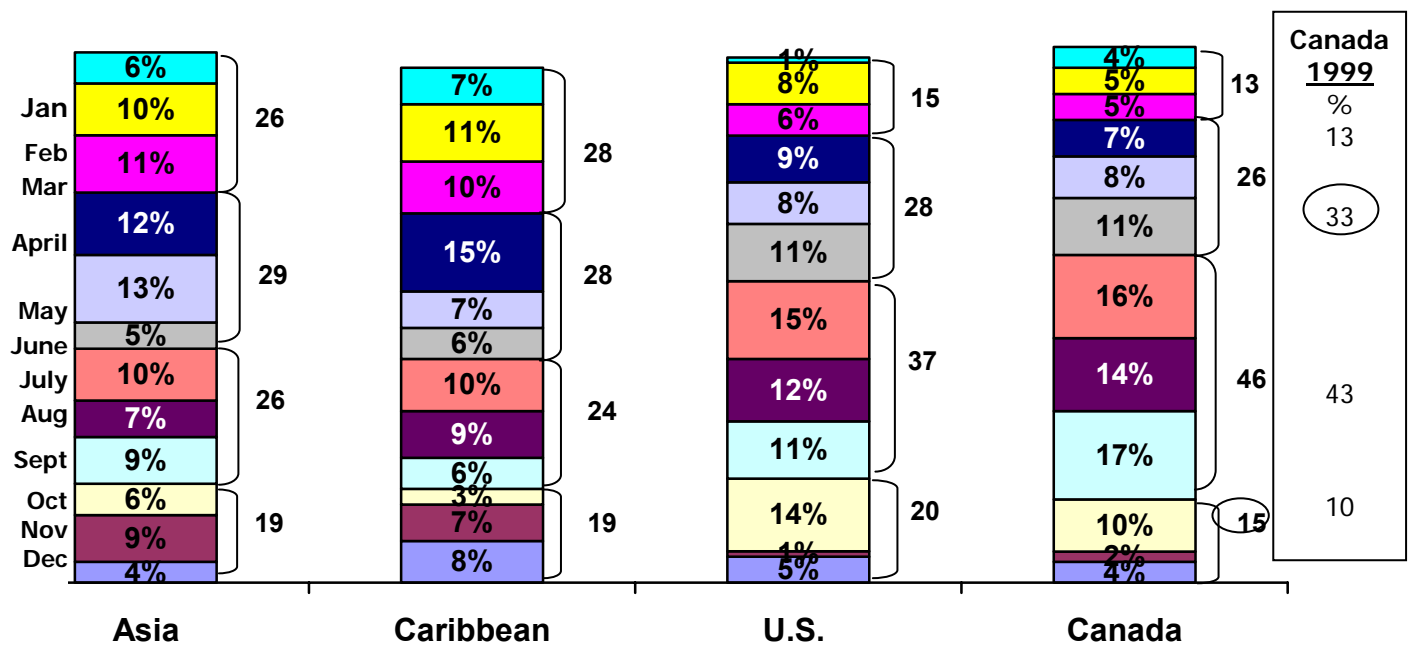
4.4 Time of Travel – By Destination

June to October is the preferred time of travel to Canada. This is similar to the US trip pattern. Since 1999, there is greater interest in fall travel to Canada.

Asia is most common in the winter and spring for the French.

EXHIBIT SECTION 4-4: MONTH OF TRAVEL – BY DESTINATION

Percent Among Travellers Visiting Each Destination



Source: Quantitative Survey Q.11

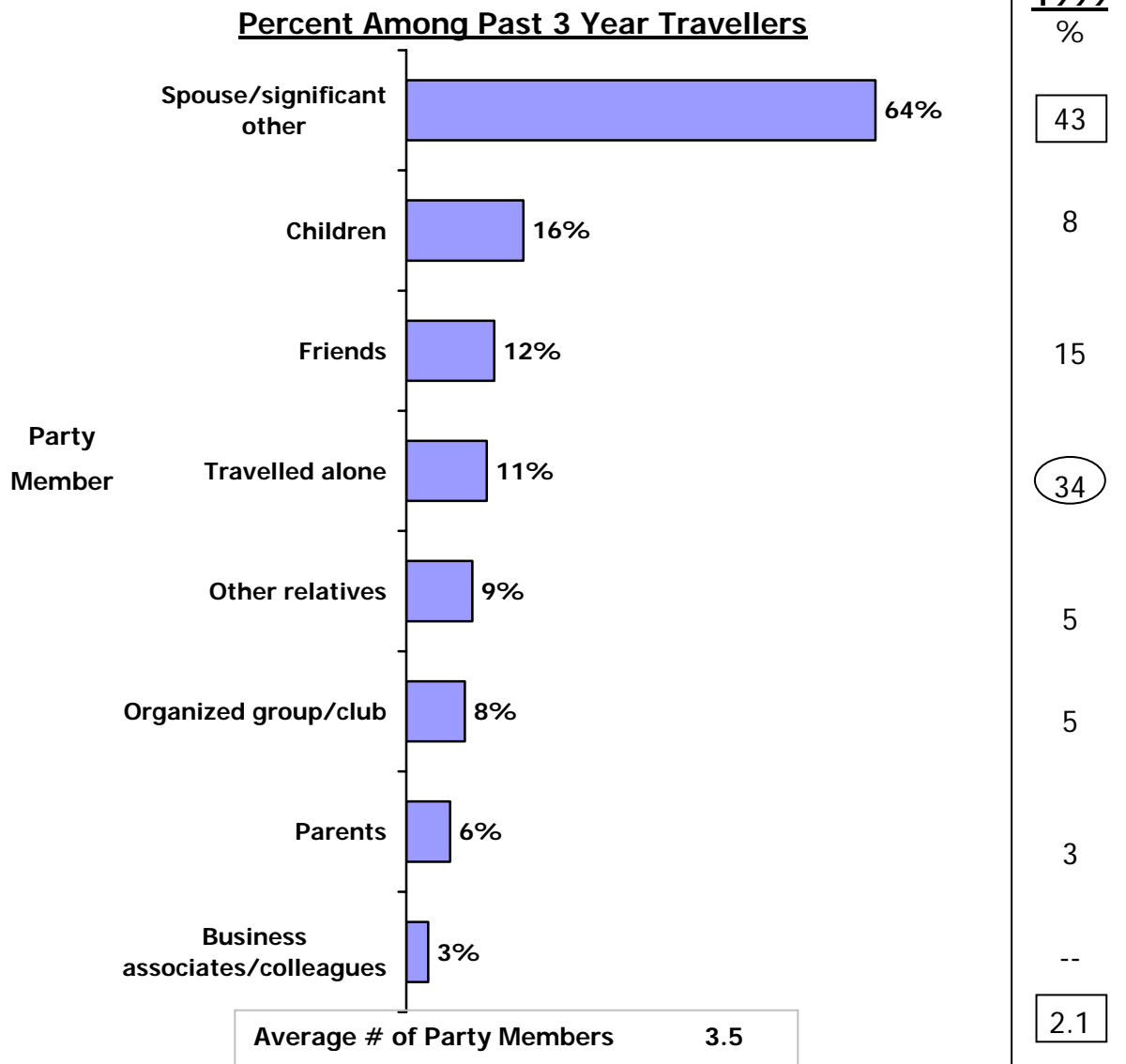
Q.11 And when did you take that trip to (DESTINATION IN Q.8a)? Please tell me the year and month you started that trip?

4.5 Party Size and Composition

Only 16% of French long-haul travellers take children along. Most travel as couples (64%).

In 1999, many more travelled alone (34% vs. 11% today), but even fewer took children along (8%).

EXHIBIT SECTION 4-5: PARTY SIZE AND COMPOSITION – BY ALL DESTINATIONS



Source: Quantitative Survey Q.12, 13a¹

¹ Base=n=1,749

Q.12 With whom did you travel on that trip to (DESTINATION IN Q.8a

Q.13a Including yourself, how many people were there in your immediate travel party?

4.6 Party Size and Composition – by Destination

The most common travel companion for Canada, as with all destinations shown below, is one's spouse or significant other. This has risen sharply from 1999.

In that year, it was far more common to travel alone (32%) to Canada.

EXHIBIT SECTION 4-6: PARTY SIZE AND COMPOSITION – BY DESTINATION

	Percent Among Travellers Visiting Each				Canada 1999 %
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %	
<u>Party Member</u>					
Spouse/significant other	62	69	57	60	44
Children	13	18	15	15	8
Friends	10	11	14	13	17
Travelled alone	13	9	16	13	32
Other relatives	7	8	11	9	2
Organized group/club	11	3	7	8	7
Parents	5	7	6	6	2
Business associates/colleagues	5	2	3	4	--
Average # of party members	3.9	3.1	2.8	3.6	1.9

Source: Quantitative Survey Q. 12, 13a

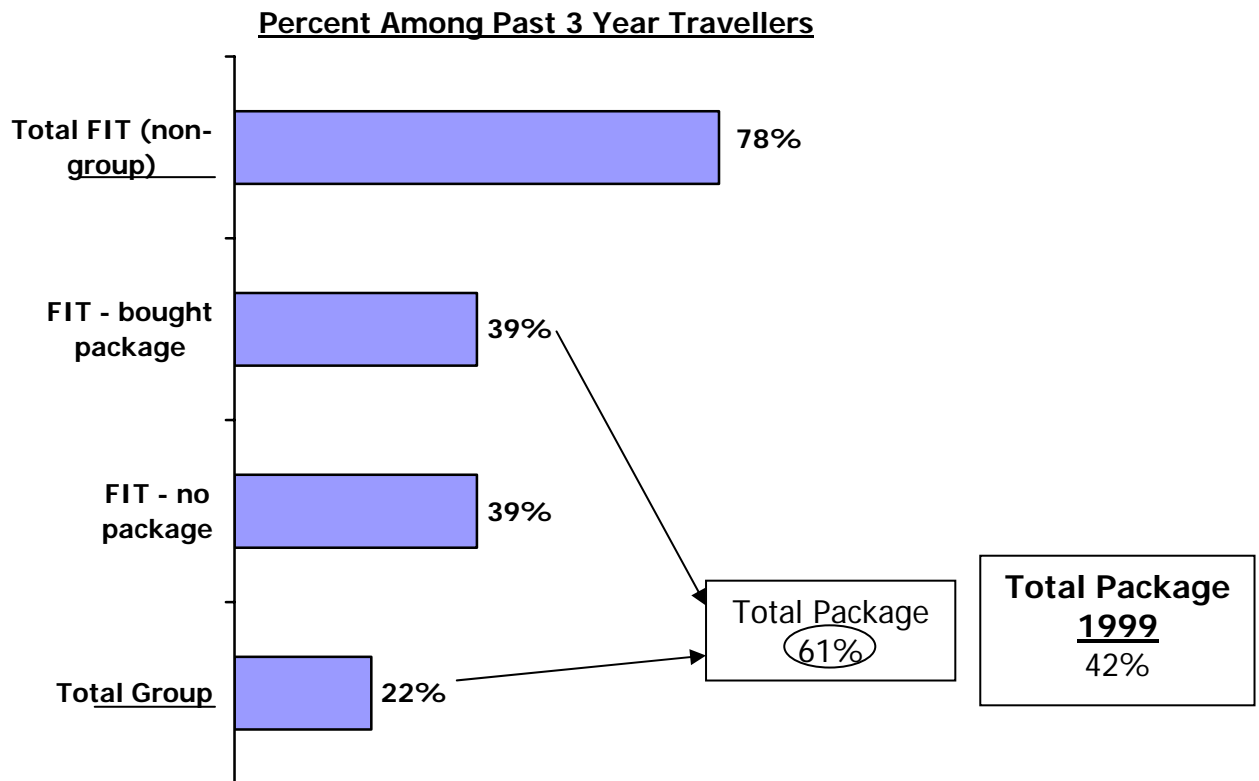
Q.12 With whom did you travel on that trip to (DESTINATION IN Q.8a)

Q.13a Including yourself, how many people were there in your immediate travel party?

4.7 Travelled as FIT vs. Group

FIT dominates French long-haul travel (78%). However, 6 in 10 do buy packages (39% an FIT package, 22% a group). And, this has grown since 1999 (42%).

EXHIBIT SECTION 4-7: FIT VS. GROUP TRAVEL — BY ALL DESTINATIONS



Source: Quantitative Survey Q.16,17a¹

¹ Base: n=1,749

Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?

Q.17a On that trip, did you buy a package that included airfare and accommodation?

4.8 Travelled as FIT vs. Group – By Destination

Packages are very popular to the Caribbean. Only 29% of trips to Canada are on a package. Eight in ten to Canada are FIT—mostly no package (51%).

One in five trips to Canada is in a group, so that segment is still alive and well, although relatively small.

In 1999, 54% used a package to Canada (FIT or Group), similar to today (50%).

EXHIBIT SECTION 4-8: FIT VS. GROUP – BY DESTINATION

	Percent Among Travellers Visiting Each			
	<u>Asia</u> (324) %	<u>Caribbean</u> (216) %	<u>U.S.</u> (277) %	<u>Canada</u> (719) %
<u>Travelled as:</u>				
<u>Total FIT (non-group)</u>	<u>67</u>	<u>86</u>	<u>83</u>	<u>79</u>
Total FIT – bought package	34	60	24	29
Total FIT – no package	33	27	59	51
<u>Total Group</u>	<u>33</u>	<u>14</u>	<u>17</u>	<u>21</u>

Source: Quantitative Survey Q.16,17a

Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?

Q.17a On that trip, did you buy a package that included airfare and accommodation?

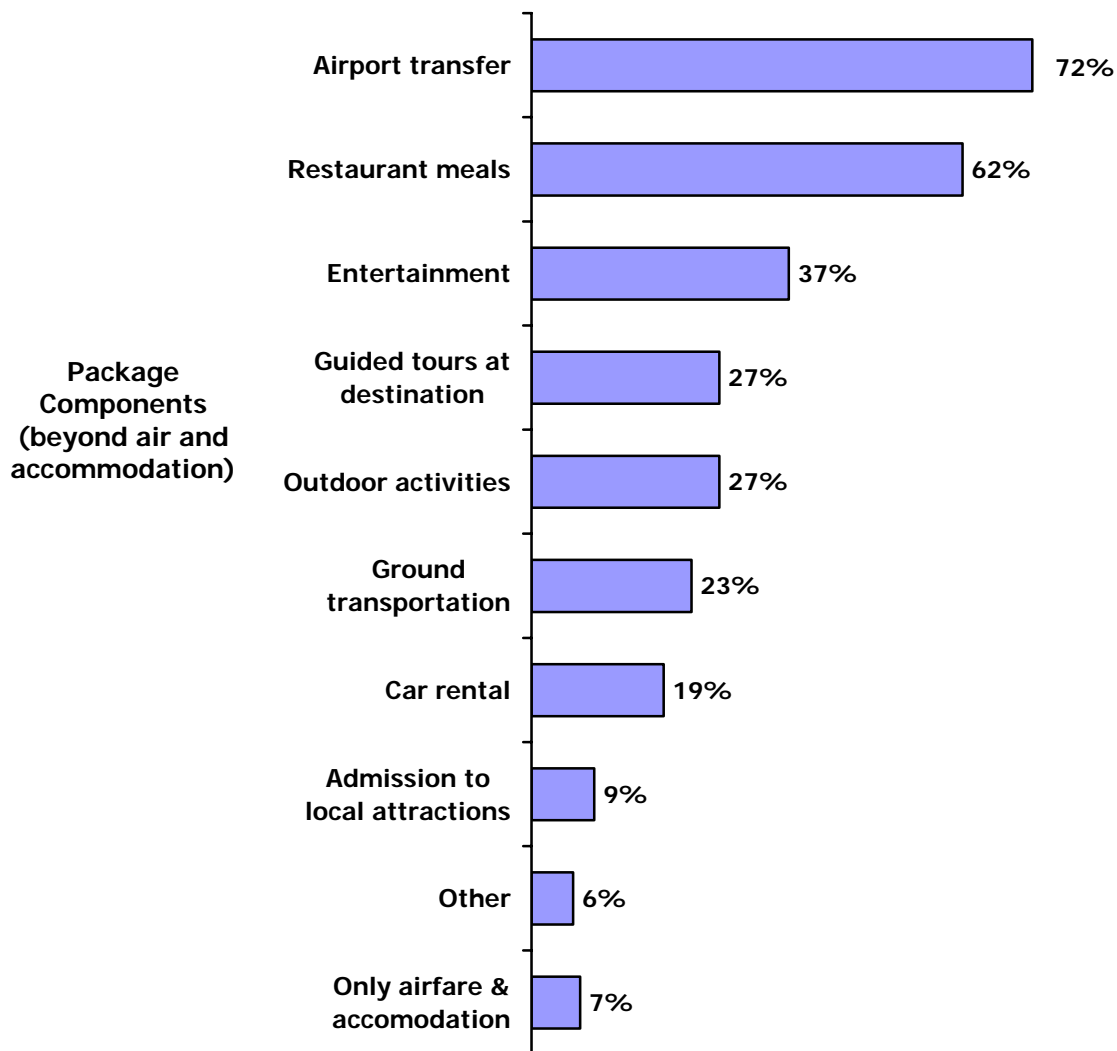
4.9 FIT Package Components

The 39% who bought an FIT package (air and accommodation) on their most recent long-haul trip usually include airport transfers and a significantly high 62% including restaurant meals.

Other components are considerably less common.

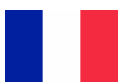
EXHIBIT SECTION 4-9: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION — BY ALL DESTINATIONS

Percent Among Those Who Travelled on FIT Package



Source: Quantitative Survey Q.17b¹

¹ Base: n=608



4.10 FIT Package Components – By Destination

Canadian packages are often air and accommodation only, but 6 in 10 do include airport transfers, and just under half are quite extensive--including restaurant meals, guided tours and car rental.

EXHIBIT SECTION 4-10: FIT PACKAGE COMPONENTS BEYOND AIR AND ACCOMMODATION
— BY DESTINATION

	Percent Among Those Who Travelled on FIT Package			
	Asia	Caribbean	U.S.	Canada
	(115) %	(126) %	(69) %	(173) %
Package Components (beyond air/accommodation)				
Airport transfers	67	72	58	59
Restaurant meals	58	71	26	45
Entertainment	39	50	24	26
Guided tours at destination	55	17	19	45
Outdoor activities	21	36	6	18
Ground transportation between overnight destinations	42	16	15	31
Car rental	24	17	35	45
Admission to local attraction	20	4	16	17
Other	4	6	4	6
Only airfare and accommodation	4	4	17	7

Source: Quantitative Survey Q.17b¹

17b What else was included in the package, if any?

¹ 17b) What else was included in the package, if any?

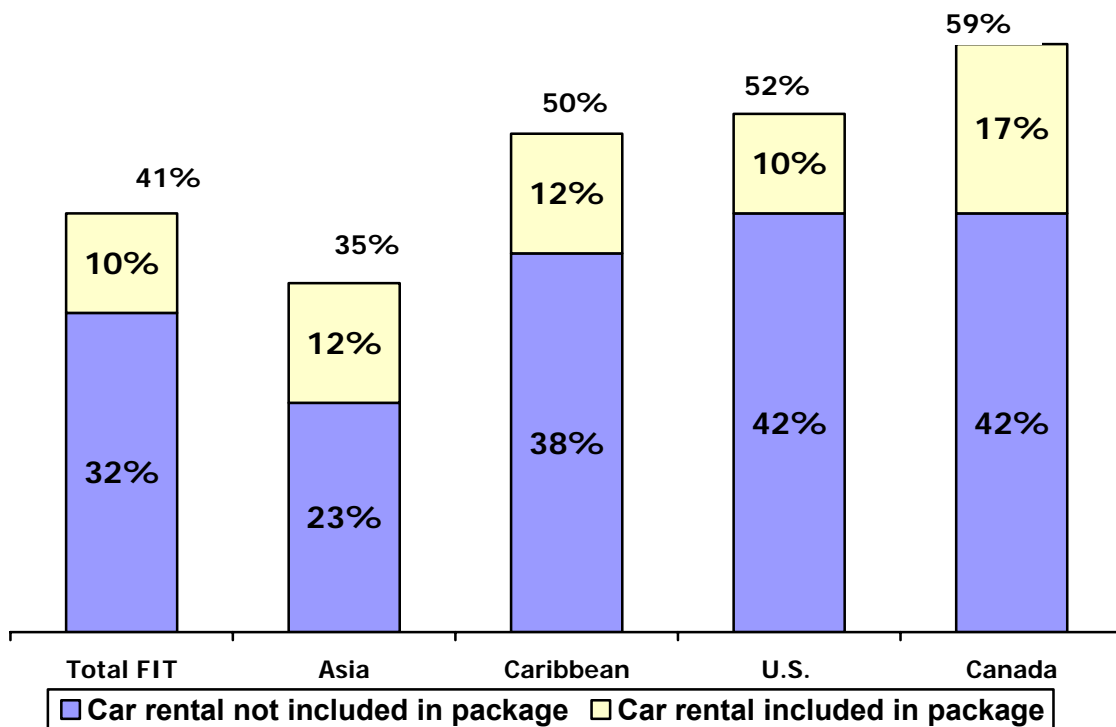


4.11 FIT Car Rental

Renting a car is very common in Canada and the US. Note that most rentals in Canada are not part of a package. Clearly non-package FIT travellers are picking up cars on arrival and proceeding on their own.

EXHIBIT SECTION 4-1 1: FIT CAR RENTAL

Percent Among FIT Travellers Visiting Each Destination



Source: Quantitative Survey Q.17b,c¹

¹Base: n=1,370

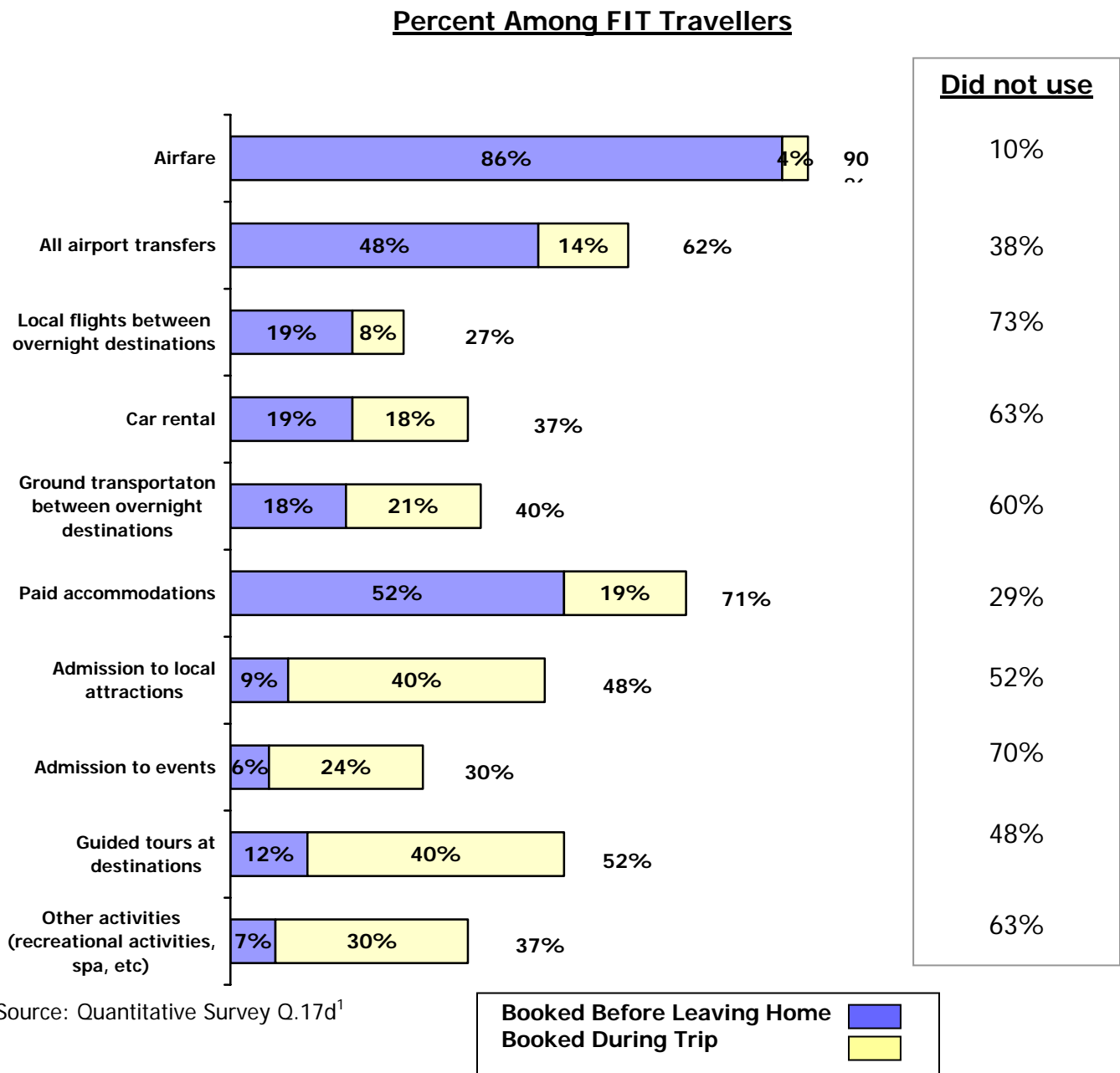
17b) What else was included in the package, if any?

17c) (IF NO AT Q.17A OR IF CAR RENTAL NOT CHECKED IN Q.17B, ASK Q.17C. OTHERS SKIP TO Q.18) Did you rent a car on that trip?

4.12 FIT Trip Components Booked Before Departure vs. During Trip

Long-haul airfares, transfers, accommodation and local flights tend to be pre paid. Otherwise, trip components are purchased locally in most cases.

EXHIBIT SECTION 4-12: FIT TRIP COMPONENTS BOOKED BEFORE DEPARTURE VS. DURING TRIP



¹ Base: n=1,370

Q.17d On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?



4.13 FIT Trip Components Booked Before Departure vs. During Trip – by Destination

The pattern for Canada is very similar to the US.

EXHIBIT SECTION 4-13: FIT TRIP COMPONENT BOOKED BEFORE DEPARTURE VS. DURING TRIP – BY DESTINATION

	Percent Among FIT Travellers Visiting Each Destination			
	Asia (222) %	Caribbean (184) %	U.S. (235) %	Canada (571) %
<u>Airfare</u>	<u>89</u>	<u>85</u>	<u>93</u>	<u>94</u>
Booked before leaving home	81	82	90	90
Booked during trip	8	3	3	4
Did not use	11	15	7	7
<u>Airport Transfers</u>	<u>66</u>	<u>65</u>	<u>52</u>	<u>55</u>
Booked before leaving home	45	53	37	37
Booked during trip	21	12	16	17
Did not use	34	35	47	46
<u>Local Flights Between Overnight Destinations</u>	<u>44</u>	<u>19</u>	<u>29</u>	<u>29</u>
Booked before leaving home	28	14	23	20
Booked during trip	15	5	6	9
Did not use	57	82	71	71
<u>Car Rental</u>	<u>29</u>	<u>43</u>	<u>45</u>	<u>56</u>
Booked before leaving home	15	23	30	33
Booked during trip	14	20	15	23
Did not use	71	57	55	44
<u>Ground Transportation Between Overnight Destinations</u>	<u>55</u>	<u>26</u>	<u>37</u>	<u>44</u>
Booked before leaving home	27	12	16	19
Booked during trip	28	13	21	25
Did not use	45	74	63	56
<u>Paid Accommodation</u>	<u>72</u>	<u>65</u>	<u>72</u>	<u>71</u>
Booked before leaving home	46	56	49	47
Booked during trip	26	9	23	25
Did not use	28	35	28	29

4.13 FIT Trip Components Booked Before Departure vs. During Trip – by Destination

	Percent Among FIT Travellers Visiting Each Destination			
	Asia (222) %	Caribbean (184) %	U.S. (235) %	Canada (571) %
<u>Admission to Local Attractions</u>	<u>56</u>	<u>38</u>	<u>57</u>	<u>59</u>
Booked before leaving home	18	6	9	9
Booked during trip	38	32	48	50
Did not use	44	62	44	41
<u>Admission to Events</u>	<u>40</u>	<u>20</u>	<u>38</u>	<u>39</u>
Booked before leaving home	13	4	5	7
Booked during trip	27	16	33	32
Did not use	60	79	62	61
<u>Guided Tours at Destinations</u>	<u>55</u>	<u>51</u>	<u>45</u>	<u>55</u>
Booked before leaving home	22	10	8	11
Booked during trip	33	41	37	44
Did not use	44	49	55	45
<u>Other Activities (Recreational Activities, Spa, etc.)</u>	<u>36</u>	<u>42</u>	<u>33</u>	<u>36</u>
Booked before leaving home	7	15	2	5
Booked during trip	28	28	31	31
Did not use	64	58	67	64

Source: Quantitative Survey Q. 17d

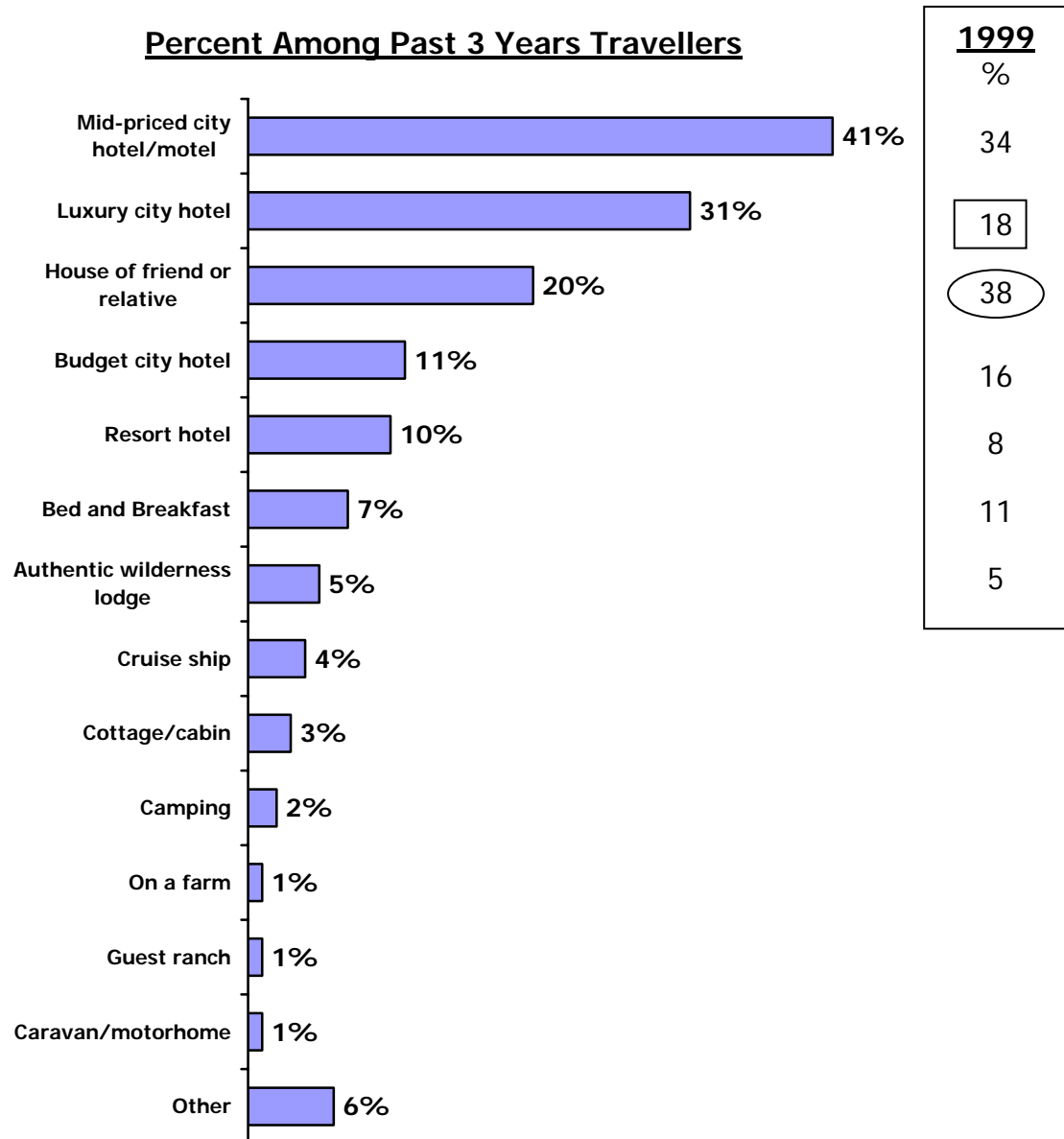
Q.17d On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?

4.14 Accommodation

The French seem to prefer mid-priced properties.

Since 1999, luxury city hotels have grown in popularity, with VFR accommodation well down.

EXHIBIT SECTION 4-14: TYPE OF ACCOMMODATION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.18¹

¹ Base: n=1,749



4.15 Accommodation-By Destination

French travellers to Canada show special interest in B&Bs, a longstanding behaviour. However, the majority stay in hotels. One in three stays with friends or relatives.

EXHIBIT SECTION 4-15: TYPE OF ACCOMMODATION – BY DESTINATION

	Percent Among Travellers Visiting Each				Canada 1999 %
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %	
<u>Accommodation Type</u>					
Mid-priced city hotel/motel	51	23	52	51	54
Luxury city hotel	41	32	24	22	16
Home of friend or relative	14	14	30	32	31
Budget city hotel	14	4	19	14	14
Resort	8	19	2	8	2
Bed and Breakfast	7	9	7	19	22
Authentic wilderness lodge	6	1	4	7	6
Cruise ship	5	5	1	*	
Cottage/cabin	2	2	3	9	
Camping	3	1	3	4	
On a farm	1	1	*	3	
Guest ranch	*	1	1	2	
Caravan/motor home	1	-	1	2	
Other	4	9	6	7	

Source: Quantitative survey Q.18

Q.18 In what type of accommodation did you stay?
*Less than 0.5%

Q.18 In what type of accommodation did you stay? (Please check all that apply)

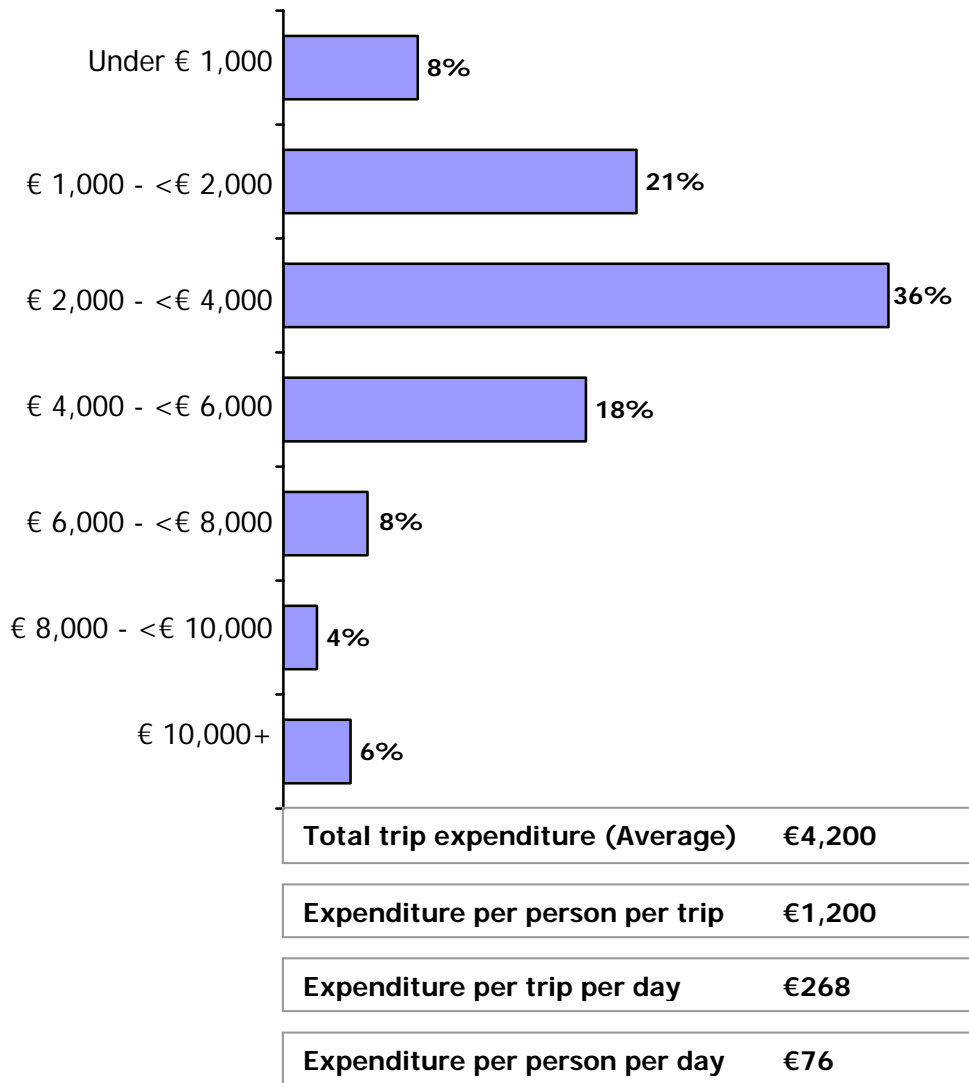


4.16 Trip Expenditure

The average trip expenditure is 4,200 Euros.

EXHIBIT SECTION 4-16: TRIP EXPENDITURE — BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.19b¹

¹ Base: n=1,749

€100=CAD \$146.71 (Bank of Canada exchange rate– Nov. 21, 2007)



4.17 Trip Expenditure – By Destination

The expenditure per trip is lowest with the Caribbean. In Canada, it is 4,400 Euros, relatively low on a per day basis (211 Euros).

EXHIBIT SECTION 4-17: TRIP EXPENDITURE – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia	Caribbean	U.S.	Canada
	(324) %	(216) %	(277) %	(719) %
<u>Expenditure</u>				
Under €1,000	4	6	7	7
€1,000 - <€2,000	17	23	14	19
€2,000 - <€4,000	37	40	37	34
€4,000 - <€6,000	22	16	21	22
€6,000 - <€8,000	8	12	9	8
€8,000 - <€10,000	5	*	4	4
€10,000+	7	4	9	7
Total Trip Expenditure (Avg) €	4,600	3,800	4,800	4,400
Expenditure per person per trip €	1,179	1,226	1,714	1,222
Expenditure per trip per day €	260	252	279	211
Expenditure per person per day €	67	81	100	58

Source: Quantitative Survey Q.19b

*Less than 0.5%

€100=CAD\$146.71 (Bank of Canada exchange rate – Nov 21, 2007)

19b What was the total cost of that trip to **(DESTINATION IN Q. 8a)** for you and your immediate travel party, including airfare and all other costs? [ACCEPT ONE ANSWER ONLY]

19b What was the total cost of that trip in Euros to **(DESTINATION IN Q. 8a)** for you and your immediate travel party, including airfare and all other costs? [ACCEPT ONE ANSWER ONLY]

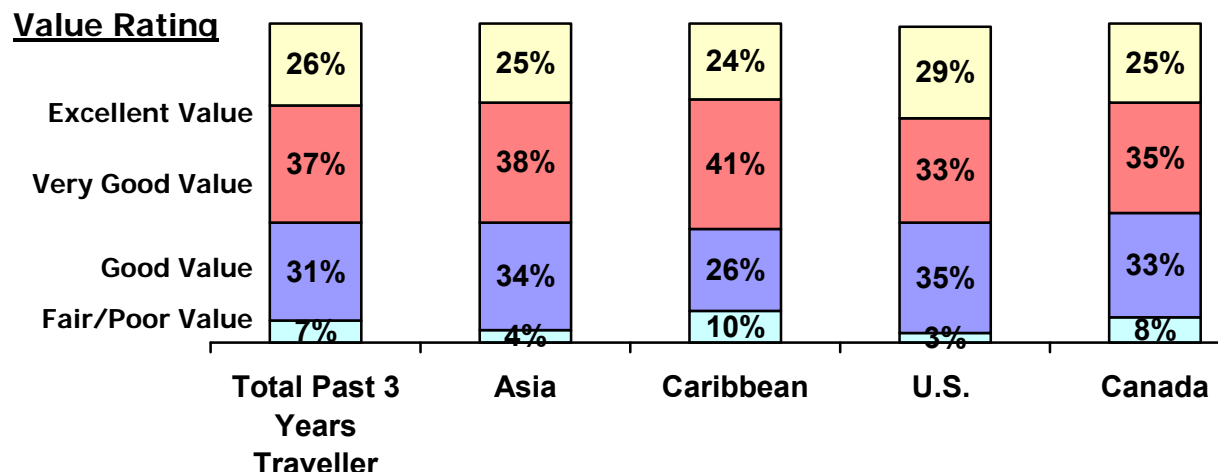


4.18 Value for Money

Canada receives good value ratings, but not quite as high as other destinations.

EXHIBIT SECTION 4-18: VALUE FOR MONEY

Percent Among Travellers Visiting Each Destination



Top Two Boxes

Excellent/Very Good	62%	63%	65%	62%	59%
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Source: Quantitative Survey Q19c

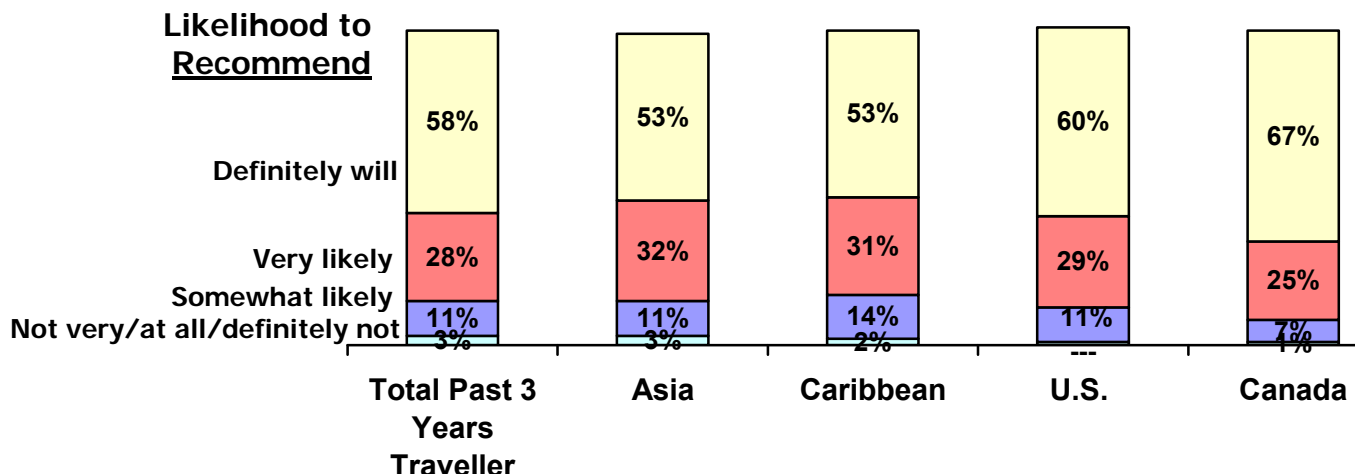
Q.19c Overall, how would you rate that trip on value for money?

4.19 Likelihood to Recommend Destination to Other

In spite of marginally lower value ratings, Canada ranks first as a country likely to be recommended to others (92%).

EXHIBIT SECTION 4-19: LIKELIHOOD TO RECOMMEND DESTINATION TO OTHERS

Percent Among Travellers Visiting Each Destination



Top Two Boxes

Definitely/very likely	86%	86%	84%	89%	92%
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Source: Quantitative Survey Q19d

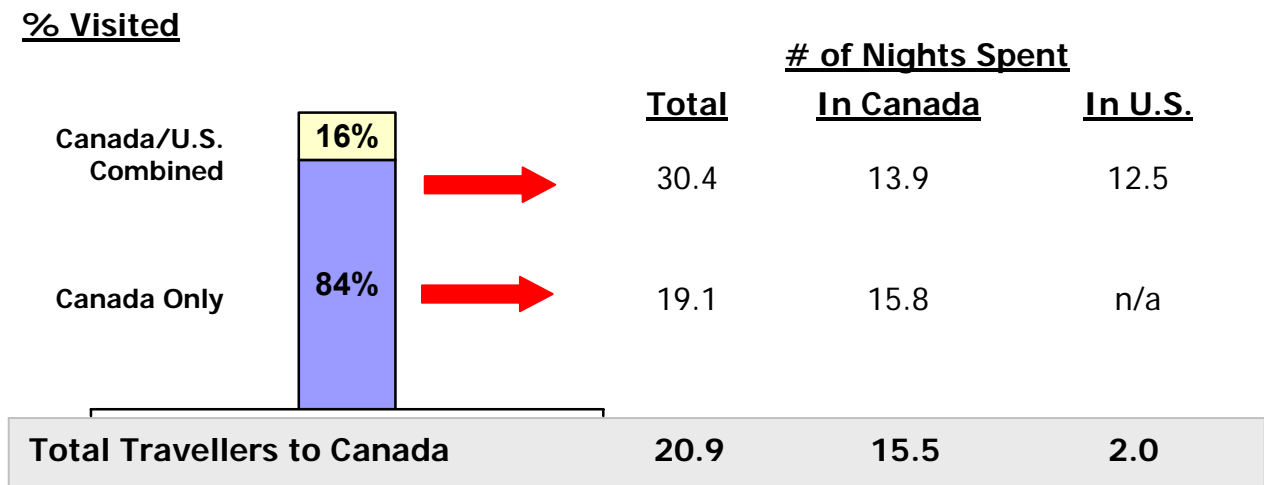
Q. 19d How likely are you to recommend that destination to others?

4.20 Multi-Country Visits

Visiting the US and Canada in combination is not very popular (to only 16%).

EXHIBIT SECTION 4-20: INCIDENCE/DURATION OF VISIT IN CANADA/U.S.

Among Past 3 Years Travellers to Canada



Source: Quantitative Survey Q.10a,b,c¹

¹ Base: n=588

10.a On that trip to (Q. 8a) DESTINATION), how many nights, in total, were you away from home?

10.b (IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in Canada?

10.c IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in the United States on that trip, if any?



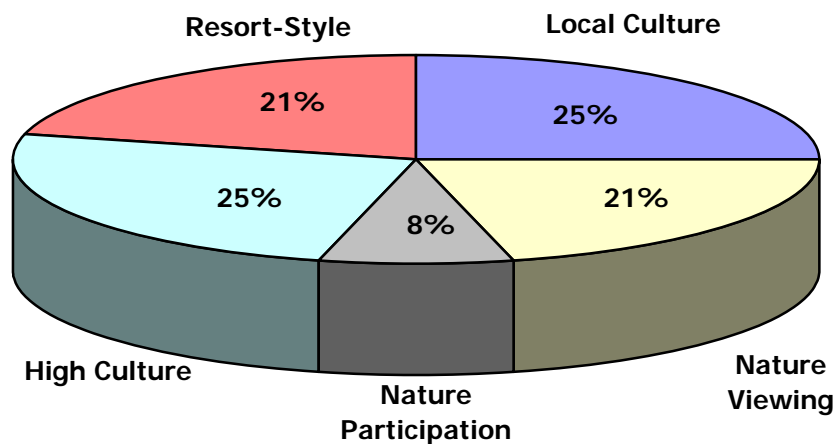
Section 5: Market Segmentation

5.1 Segmentation Analysis

Assisted by grassroots learning from the preliminary focus groups, a multi-dimensional rating question was created for the quantitative survey. A modified Howard-Harris cluster analysis method was used to generate a number of segment solutions (2 to 8 groups). These segment solutions were examined in detail to determine the final segment solution of 5 groups, which most simply explained the targets' attitudes. They are named and described based on the attitudes associated with the membership of the segments.

Each of these segments is discussed in detail in the next section.

EXHIBIT SECTION 5-1: SIZE OF MARKET SEGMENT



Source: Quantitative Survey Q.20¹

¹ Base= Past/Future Travellers (n=2,544)

Q.20 Please imagine that you are taking an overseas pleasure trip **beyond the European Union countries, North Africa and the Mediterranean** for 3 nights or longer with at least one night in paid accommodation. For each statement on this page check one box to show how important that reason is to you when considering such a trip.

5.2 Segment Characteristics

High Culture (25%)

This segment is attracted to city life and culture.

Local Culture (25%)

Meeting and interacting with local people and experiencing how they live at the grassroots level is the key focus of this group.

Resort Style (21%)

Relaxation, sun and luxury dominate here.

Nature Viewing (21%)

Being surrounded by beautiful nature and taking it all sensually drives this segment.

Nature Participation (8%)

This group is not satisfied with visual stimuli. They want to get involved. Soft adventure prevails.

5.2 Segment Characteristics

EXHIBIT SECTION 5-2: SEGMENT CHARACTERISTICS

	Nature Viewing	Nature Participation	High Culture	Resort Style	Local Culture
Segment Attitudinal Drivers	<ul style="list-style-type: none"> - Surrounded by beautiful unspoiled nature - Experiencing unspoiled nature - Seeing wildlife in nature - Being in a clean, healthy environment - Experiencing a wide, spacious outdoor environment 	<ul style="list-style-type: none"> - Enjoying alpine (downhill) skiing or snowboarding - Participate in active outdoor sports - Roughing it - Travelling in a group tour 	<ul style="list-style-type: none"> - Visiting museums or art galleries - Visiting historical attractions - Experiencing a modern culture - Attending theatres, clubs or shows - Seeing as much as possible in the time available 	<ul style="list-style-type: none"> - Sunbathing or other beach activities - Staying at luxury surroundings - Enjoying a relaxing atmosphere - Feeling secure and safe - Bringing the family together - Getting away/escaping from the demand of home - Being in a clean, healthy environment - Availability of a wide selection of activities - Enjoying the convenience of the modern world while experiencing nature 	<ul style="list-style-type: none"> - Spending time in the home of a resident - Meeting and interacting with local people - Spending time in one area to experience how local people live - Staying in accommodation unique to that country - Experiencing aboriginal culture - Opportunity to try different cuisines - Experiencing a different country's healthy lifestyle - Visiting a local supermarket

5.2 Segment Characteristics

	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort-Style</u>	<u>Local Culture</u>
Profile Skews					
Gender					
Male	53	69	45	53	52
Female	47	31	55	47	49
Marital Status	Married with no young children at home	Mixed of married and singles with young children at home	Married with no young children at home	Married with children	Married with no young children at home
Age					
18 to 29	24	40	20	31	17
30 to 39	23	24	21	28	19
40 to 49	19	19	16	22	23
50-59	18	10	18	12	21
60+	16	6	26	7	21
Household Income (monthly gross €)					
Under €1,500	13	22	13	13	15
€1,500 - <€2,300	20	15	16	17	18
€2,300 - <€2,800	15	13	11	12	11
€2,800 - <€3,800	21	20	19	22	25
€3,800 +	13	22	23	21	18
Recent Trip Expenditure (€)					
Under €2,000	13	25	15	20	17
€2,000 - <€4,000	18	24	24	21	22
€4,000 - <€6,000	11	19	10	13	7
€6,000 - <€8,000	5	6	5	6	3
€8,000+	6	4	6	6	5
Average (€ Euro)	4,700	3,800	4,300	4,200	4,000

5.2 Segment Characteristics

High Culture

- Skews older

Local Culture

- Appeals to a broad age and income range

Resort Style

- The family market dominates

Nature Viewing

- Appeals to a broad age and income range

Nature Participation

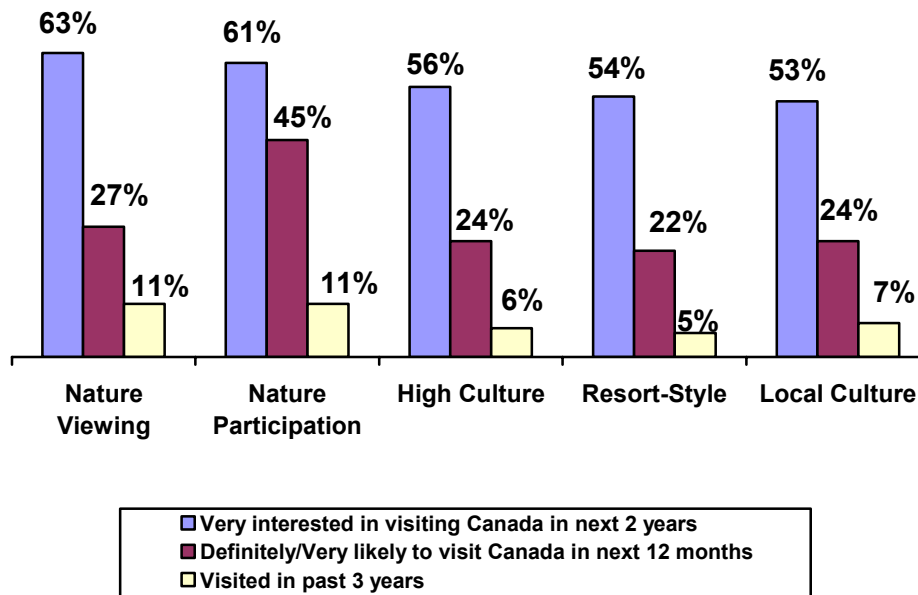
- Younger-- under 40, often under 30



5.3 Current Plans to Visit Canada

Local Culture, Nature Viewing and Nature Participation segments are the three key targets for Canada, based on interest and past experience.

EXHIBIT SECTION 5-3: CURRENT PLANS TO VISIT CANADA — BY SEGMENT



Source: Quantitative Survey Q.7, 22, 23¹

¹ Base=Past/Future Travellers (n=2,544)

Q.7 (ASK THOSE WHO ANSWERED 1+ IN Q.4, OTHERS SKIP TO Q.20) (ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF NONE IN Q.4)
During the past 3 years which of these countries or destinations outside **Germany** did you visit for pleasure and stayed for 3 nights or longer with at least one night in paid accommodation, if any?

Q.22 How interested are you in visiting United States, Canada, Australia or South East Asia in the **next two years**?

Q.23 How likely are you to visit (SHOW COUNTRIES WITH CODES 4 OR 3 IN Q.22) in the **next twelve months**?



5.4 Ideal Trip to Canada by Segment

Here is the ideal Canadian trip for each of the 3 key target segments:

Local Culture

This segment wants to get to know the local inhabitants, visit small towns and really get to the grass roots of the French Canadian culture.

Another way to connect with the society is seeing old architecture, museums and galleries.

However, observing and interacting with nature is also extremely important.

Quebec is clearly the preferred destination, but this segment is also curious about Ontario, B.C. and Newfoundland/Labrador. The Territories are also very appealing.

Most would be FIT travellers, preferably not on a package.

July to September is the preferred season, 2 weeks the ideal duration.

Authentic wilderness lodges, B&B's, Canadian ranches and farms are highly interesting accommodation.

Nature Viewing

This segment wants to experience nature but also experience the French Canadian life and cuisine. They want to visit small towns and get to know the local inhabitants. This is a clear parallel to what was learned in the focus groups, discussed earlier.

Further, they have little interest in traditional cities—preferring to get away from urban structure and out into small towns and nature.

The French are great explorers and there appears to be plenty of interest beyond Quebec.

Here we see evidence of a desire to see the Aurora, observe whales, observe wildlife, visit wilderness areas—product offered by many other regions of Canada.



5.4 Ideal Trip to Canada by Segment

Nature Viewing, *continued*

Beyond Quebec, they express interest particularly in Ontario, BC, Newfoundland and Labrador and in the Canadian Territories.

July to September is the preferred season, 2 weeks the ideal duration. Wilderness lodges and B&B's are unusually appealing, city hotels relatively low on their preferred list.

Nature Participation

As a younger group, these individuals show less interest in nature observation and greater interest in activity—trail riding, cycling, snowmobiling, heli/cat skiing as well as traditional skiing and snowboarding.

However, in spite of the quest for outdoor activity, this segment also wants to indulge themselves—with wine/culinary tours, spa visits, urban culture and nightlife. They have far less aversion to Canada's modern cities.

Resorts are the preferred accommodation, July to September the best months (although winter does appeal for snow activities), 2 weeks the ideal duration, Quebec and Ontario the most desired provinces to visit.

5.4 Ideal Trip to Canada

EXHIBIT SECTION 5-4: IDEAL TRIP TO CANADA — BY SEGMENT

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	<u>Nature Viewing</u>	<u>Nature Participation</u>	<u>High Culture</u>	<u>Resort- Style</u>	<u>Local Culture</u>
	(558) %	(210) %	(559) %	(468) %	(570) %
<u>Ideal Next Trip</u>					
<u>Season</u>					
January-March	12	15	7	10	8
April-June	26	30	28	24	26
July-September	42	43	48	46	40
October-December	21	12	17	20	26
<u>Duration</u>					
# of nights (avg)	13.3	12.7	13.0	12.2	14.8
<u>Provinces Likely to Visit</u>					
Quebec	85	65	89	89	85
Ontario	53	40	58	54	54
B.C.	32	23	36	33	32
Newfoundland and Labrador	30	21	24	26	32
North West Territories	23	13	17	16	22
Nova Scotia	16	19	17	14	18
Yukon	16	14	10	9	17
PEI	11	14	10	11	11
Alberta	12	10	9	10	11
Nunavut	11	9	7	6	14
New Brunswick	10	13	9	5	11
Saskatchewan	9	12	6	5	9
Manitoba	10	14	7	5	9
<u>Would Also Visit Overnight or Longer</u>					
USA	30	39	45	38	31
Other countries	8	17	8	7	8
Canada only	64	47	51	56	63
<u>Type of Tour</u>					
<u>Group Tour</u>	22	25	27	21	18
Prefer: All days organized	13	16	18	12	12
Many free days	8	9	9	9	6
<u>FIT (non-group)</u>	78	75	73	79	82
Prefer: Package	39	39	39	50	31
Non-Package	39	35	34	29	51

Source: Quantitative Survey Q.25

Q.25 Thinking about your next trip to Canada, if you were to go, describe your ideal trip



5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Nature Viewing	Nature Participation	High Culture	Resort- Style	Local Culture
	(558) %	(210) %	(559) %	(468) %	(570) %
Transportation Between Centres					
Rental car	76	72	71	82	75
Air	65	78	76	73	69
Rail	55	60	65	53	66
Motor coach	49	45	61	45	59
Private car	23	32	26	26	28
Motor home/camper	11	14	10	9	16
Accommodation					
City hotel	29	34	51	35	22
Authentic wilderness cabin or lodge	34	14	21	20	40
Bed and Breakfast	26	17	26	21	35
Lakeside resort	21	15	22	23	16
On a ranch	21	15	16	18	23
On a farm	11	16	7	4	22
Home of friend or relative	12	6	7	8	12
Seaside resort	8	15	11	20	2
Mountain resort	8	17	8	10	7
Canadian Spa	5	5	6	14	3
Coastal cruise ship	3	6	4	4	4
Ski resort	3	12	2	4	2
Caravan/motor home	2	--	2	*	3
Camping	2	2	1	1	1

*Less than 0.5%

5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Nature Viewing	Nature Participation	High Culture	Resort- Style	Local Culture
	(558) %	(210) %	(559) %	(468) %	(570) %
Activities					
Viewing rivers or waterfalls	96	74	97	93	96
Getting to know the local inhabitants	93	72	96	87	99
Experiencing French Canadian culture and cuisine	91	78	95	92	96
Taking nature tours	93	81	88	86	96
Visiting small towns	92	72	93	84	97
Taking city tours	85	76	95	91	87
Visiting wilderness areas	92	71	88	80	95
Observing wildlife in their natural environment	92	75	87	85	91
Visiting places of historical interest	86	71	95	85	87
Viewing mountains	87	78	83	85	89
Aboriginal cultural experiences, celebrations, and attractions	81	67	89	70	92
Visiting world heritage sites	79	69	92	76	87
Viewing Aurora Borealis (Northern Lights)	81	62	80	81	81
Trekking in a nature area	83	67	69	72	84
Whale watching	80	72	72	73	79
Seeing old architecture	67	66	84	67	81
Dog sledding	74	67	69	76	78
Viewing autumn leaves	72	61	72	65	79
Seeing beautiful beaches and coastlines	66	62	70	71	66
Taking a garden or flower tour	60	60	65	57	57
Attending festivals or fairs	50	61	71	53	61
Seeing modern architecture	50	66	72	50	59
Snowmobiling	63	63	51	67	61
Visiting museums or art galleries	40	58	82	49	64
Taking a wine/culinary tour	50	53	60	55	57
Taking a rail tour	45	55	56	36	57
Visiting a spa	38	53	39	55	33
Attending theatres, clubs or shows	27	57	55	41	38
Canoeing/kayaking/boating	45	62	34	48	42
Taking a cruise	42	52	46	49	35

5.4 Ideal Trip to Canada

	Among Those Very/Somewhat Interested in Visiting Canada in Next 2 Years				
	Nature Viewing	Nature Participation	High Culture	Resort- Style	Local Culture
	(550) %	(210) %	(559) %	(468) %	(570) %
<u>Activities</u>					
Attending rodeos	40	50	40	38	35
Cycling	39	51	33	37	39
Trail riding on horseback	36	57	31	38	39
Study English	29	47	32	29	31
Visiting friends or relatives	29	45	27	26	32
Sports fishing	28	43	22	25	29
Downhill skiing or snowboarding	19	55	14	33	18
Heli/cat skiing	22	50	19	24	21
Visiting casinos	17	42	21	28	12
Golfing	6	39	10	14	6
Hunting	9	35	7	9	8

Source: Quantitative Survey Q.25

Q.25 Thinking about your next trip to Canada, if you were to go, describe your ideal trip

5.5 Segment Mapping

The following map illustrates that to some degree Canada is in competition with the U.S. for the **Nature Participation** segment. However, they place more importance on the quality of the outdoor environment and less on urban cultural needs which makes Canada a stronger candidate.

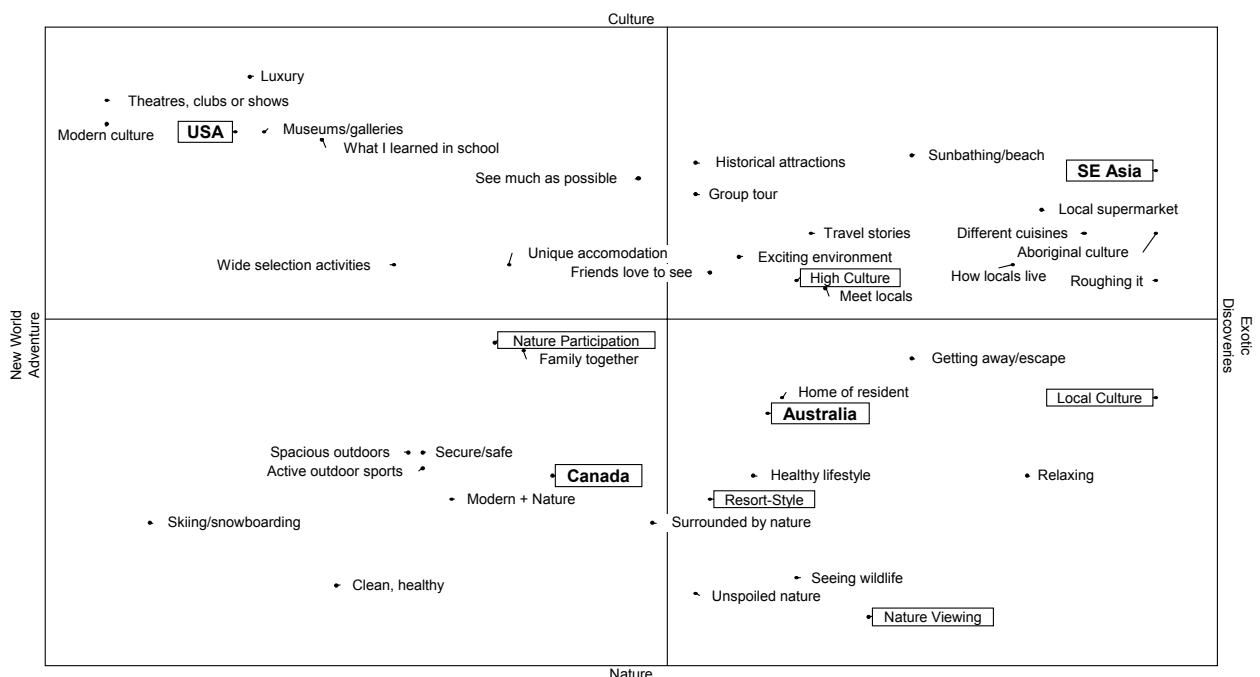
The Local Culture segment is positioned on the Nature side of the graph (as is Canada) but far to the east – drawn there by the appeals of local culture is Asia. Although a very different product experience, Canada, then, competes with S.E. Asia for this segment.

With the **Nature Viewing** segment Canada competes more with Australia

- Canada's advantage over Australia includes proximity and, of course, Australia is a minor destination for the French, noted earlier.
- Clearly, this is Canada's best target opportunity.

The **Resort-Style** segment is positioned quite close to Canada on the map below, largely because of the desire to relax in a healthy, natural environment. However, this group also seeks sun and beaches, noted earlier, which Canada would have a more difficult time competing with on a global level.

EXHIBIT SECTION 5-5: SEGMENT MAPPING



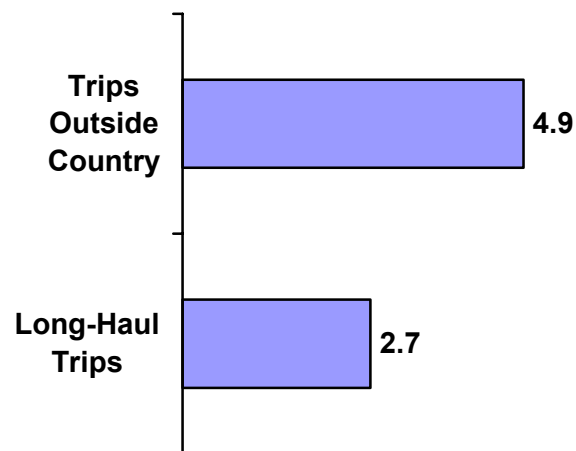
Section 6: Traveller Profile

6.1 Trip Frequency

The French traveller took 4.9 trips outside their country during the past 3 years, over half (2.7) long-haul.

EXHIBIT SECTION 6-1: NUMBER OF TRIPS TAKEN IN PAST 3 YEARS

Among Past 3 Years Travellers



Source: Quantitative Survey Q.3c, Q4¹

¹ Base= past 3 year travellers (n=1,749)

- Q.3c In the past three years, that is since September, 2004, how many times have you, yourself, taken a **pleasure trip outside of your home country for 3 nights or longer with at least one night in paid accommodation**. Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only
- Q.4 In the past three years, that is since September, 2004, how many times have you, yourself, taken a **pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation**? Again, please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

6.2 French Long-haul Travel Market Profile

Current visitors to Canada skew younger (76% under age 50). In 1999, only 59% were under 50. They come from many jurisdictions in France, beyond Paris.

Those aged 50+ are far more often found traveling to other destinations.

As many as 44% have close friends or relatives in Canada, similar to 1999. This is a reminder that these friends are key influencers in the travel decision process, as discussed elsewhere in the report.

EXHIBIT SECTION 6-2: FRENCH LONG-HAUL MARKET PROFILE

	Percent Among Travellers Visiting Each				Canada 1999 %
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %	
<u>Age</u>					
18 – 29	20	20	32	24	21
30 – 39	25	22	19	28	19
40 – 49	19	27	15	24	19
50 – 59	18	20	18	13	18
60+	18	11	17	12	23
<u>Gender</u>					
Male	61	49	49	53	50
Female	40	51	51	47	50
<u>City</u>					
Paris-Isle-of-France	27	26	27	23	
Burgundy/Champagne-	6	9	6	5	
Ardenne/Picardy					
Center/Lower-Normandy/Upper-	10	7	7	9	
Normandy					
North-Calais	4	8	4	5	
Alsace/Franche-comte/Lorraine	5	8	6	8	
Brittany/Pays-de-la Loire	11	11	14	13	
Aquitaine/Limousin/Midi-Pyrenees	12	13	14	11	
Auvergne/Rhone-Alps	12	8	12	14	
Corsica/Lanquedoc-	15	10	11	13	
Roussillon/Provience-Alpes-Azus					
<u>Close friends/relatives in Canada</u>					
Yes	21	17	23	44	40
No	77	82	77	55	60



6.2 French Long-haul Travel Market Profile

These younger travellers to Canada often have children at home, although not with them, as discussed earlier. More are travelling in couples since 1999.

	Percent Among Travellers Visiting Each				Canada 1999 %
	<u>Asia</u> (324) %	<u>Caribbean</u> (216) %	<u>U.S.</u> (277) %	<u>Canada</u> (719) %	
<u>Marital Status</u>					
Married/living with someone	71	69	65	72	54
Single	17	20	26	20	26
Divorced/widowed/separated	11	10	8	7	19
<u>Household Composition</u>					
Adults only	63	63	67	54	
With children < 18	37	37	33	46	
<u>Occupation</u>					
<u>Total employed</u>	<u>61</u>	<u>58</u>	<u>60</u>	<u>67</u>	
Semi or unskilled manual worker	2	2	2	2	
Skilled manual worker	4	4	3	4	
Supervisory or clerical / junior managerial / professional / administrative	13	18	14	19	
Intermediate managerial / professional / administrative	23	19	20	20	
Higher managerial / professional / administrative	10	7	10	14	
Self employed	6	4	10	5	
Employed part-time	3	5	2	3	
Student	7	6	13	7	
Housewife/husband	2	5	2	2	
Retired/semi-retired	20	19	17	13	
Other	6	8	5	7	



6.2 French Long-haul Travel Market Profile

French travellers to Canada have above average incomes.

	Percent Among Travelled on FIT Package			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
<u>Education</u>				
Less than secondary	1	1	-	*
Higher education	29	37	27	36
University	27	22	32	28
Graduate school	14	6	16	13
<u>Household Income (monthly gross €)</u>				
Under €1,500	11	12	12	9
€1,500 - <€2,300	18	16	11	13
€2,300 - <€2,800	11	13	10	14
€2,800 - <€3,800	18	21	21	25
€3,800+	29	23	27	27

Source: Quantitative Survey Q.1,2,3a,28-34 (basic data)

CAD Equivalent (Bank of Canada exchange rate, November 21, 2007)

<€1,800 = <\$2,641 CAD

€1,800 - <€2,300 = \$2,641 - \$3,374 CAD

€2,300 - <€2,800 = \$3,374 - \$4,108 CAD

€2,800 - <€3,800 = \$4,108 - \$5,575 CAD

€3,800+ = \$5,575+ CAD



Section 7: The Canadian Opportunity

7.1 Aspirational Destinations

Canada ranks 1st as a destination priority for French long-haul travellers, an unusually high placing.

The US ranks second, confirming its key competitor status. However, the U.S. has slipped in appeal since 1999 when it ranked first, ahead of Canada.

Note how the Caribbean has really gained in appeal in the past 8 years, in spite of the decline in share, noted earlier.

EXHIBIT SECTION 7-1: LONG-HAUL DESTINATION PRIORITY

Rank	<u>2007</u>	<u>1999</u>
1	Canada	2
2	United States	1
3	Caribbean	18
4	Australia	3
5	Mexico	4

Source: Quantitative Survey Q6¹

¹ Base=Past/Future Travellers (n=2,544)

- 6a Thinking of future travel **beyond the European Union countries, North Africa and the Mediterranean**, what countries would you be likely to visit on a pleasure trip for 3 nights or longer with at least one night in paid accommodation in the next two years? Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only. (Please select your most likely choices with up to 5 countries from the list below or write in your choices if not listed) **(PN: LIST FROM Q.7 WITH CODES 14-31, 46-50, 52 SUPPRESSED)**
- 6b From the countries you selected please rank those countries starting with the one you would likely to visit first, then second, third and so on.
(PROGRAMMING: SHOW Up to 5 DESTINATIONS SELECTED IN 6a)(If only one selected in Q6a skip to Q7)

7.2 Priority Analysis – by Segment

Canada's extremely high priority ranking is across the board in terms of age, gender and links with the country.

EXHIBIT SECTION 7-2: CANADA'S PRIORITY RANKING KEY SEGMENT

Canada's Priority Ranking	
	#
<u>Total</u>	1 st
<u>Gender</u>	
Male	1 st
Female	1 st
<u>Age</u>	
18 – 29	2 nd
30 – 39	1 st
40 – 49	1 st
50 – 59	1 st
60+	1 st
<u>Travelled to Canada in Past 3 Years</u>	1 st
<u>Friends and Relatives in Canada</u>	
Yes	1 st
No	2 nd

Source: Quantitative Survey Q.6b

*Note: due to the complexity of the ranking calculation (countries mentioned and ranking of each based on average scores) it is possible that rankings among sub-samples can all be slightly higher or lower than the overall rank due to numerical rounding.

Q. 6b From the countries you selected please rank those countries starting with the one you would likely to visit first, then second, third and so on.



7.3 Ideal Trip to Canada

For those seriously considering Canada as a future destination, their ideal trip would look like this:

Season:	Likely July to September
Duration in Canada:	2 weeks
Type of trip:	FIT
Many also visit:	Destination Quebec, but many also interested in other provinces, notably Ontario
Intercity:	Car rental or air highly popular
Accommodation:	Alternative accommodation-- B&B's, authentic lodge, ranch or farm of high interest. City hotels or home of friend or relatives for others
Activities:	Experiencing the French Canadian culture and cuisine, seeing Canada's natural scenery and wildlife, smaller towns, getting to know local inhabitants, places of historical interest, aboriginal culture and aurora

7.3 Ideal Trip to Canada

EXHIBIT SECTION 7-3: IDEAL TRIP TO CANADA — BY PROSPECTIVE MARKET

	Percent Among Prospective Market *
	(2418) %
<u>Ideal Next Trip</u>	
<u>Season</u>	
January – March	10
April – June	26
July – September	44
October – December	20
<u>Duration</u>	
# of nights (avg.)	13.4
<u>Provinces Likely to Visit</u>	
Quebec	85
Ontario	53
B.C.	32
Newfoundland and Labrador	27
Northwest Territories	19
Nova Scotia	16
Yukon	13
PEI	11
Alberta	10
Nunavut	9
New Brunswick	9
Saskatchewan	8
Manitoba	8
<u>Would also visit overnight or longer</u>	
USA	36
Other countries	9
Canada only	57
<u>Type of tour</u>	
<u>Group tour</u>	
Group tour	23
Prefer: All days organized	14
Many free days	8
<u>FIT (non-group)</u>	
FIT (non-group)	78
Prefer: Package	39
Non-package	38



7.3 Ideal Trip to Canada

	Percent Among Prospective Market*
	(2418) %
<u>Transportation Between Centres</u>	
Rental car	76
Air	71
Rail	60
Motor coach	53
Private car	27
Motor home/camper	12
<u>Accommodation</u>	
City hotel	34
Authentic wilderness cabin or lodge	27
Bed and breakfast	27
Lakeside resort	20
On a ranch	19
On a farm	11
Home of friend or relative	10
Seaside resort	11
Mountain resort	9
Canadian spa	7
Coastal cruise ship	4
Ski resort	3
Caravan/motor home	2
Camping	1

7.3 Ideal Trip to Canada

Activities	Percent Among Prospective Market * (2418) %
Viewing rivers or waterfalls	93
Getting to know the local inhabitants	92
Experiencing French Canadian culture and cuisine	92
Visiting small towns	90
Taking nature tours	90
Taking city tours	88
Observing wildlife in their natural environment	87
Visiting wilderness areas	87
Visiting places of historical interest	87
Viewing mountains	85
Visiting world heritage sites	83
Aboriginal cultural experiences, celebrations, and attractions	82
Viewing Aurora Borealis (Northern Lights)	79
Trekking in a nature area	76
Whale watching	75
Seeing old architecture	74
Dog sledding	73
Viewing autumn leaves	71
Seeing beautiful beaches and coastlines	68
Snowmobiling	60
Taking a garden or flower tour	60
Visiting museums or art galleries	60
Attending festivals or fairs	59
Seeing modern architecture	59
Taking a wine/culinary tour	56
Taking a rail tour	50
Canoeing/kayaking/boating	44
Taking a cruise	44
Attending theatres, clubs or shows	42
Visiting a spa	42
Attending rodeos	39



7.3 Ideal Trip to Canada

	Percent Among Prospective Market*
<u>Activities</u>	(2418) %
Cycling	38
Trail riding on horseback	38
Study English	32
Visiting friends or relatives	30
Sports fishing	28
Heli/cat skiing	24
Downhill skiing or snowboarding	24
Visiting casinos	21
Golfing	12
Hunting	11

Source: Quantitative Survey Q.24

Q.24 Thinking about your next trip to Canada, if you were to go, describe your ideal trip below:

*Very interested in visiting Canada in next 2 years.

Section 8: The Buy Cycle Model



8.1 The Buy Cycle Model – France

a) How it Works

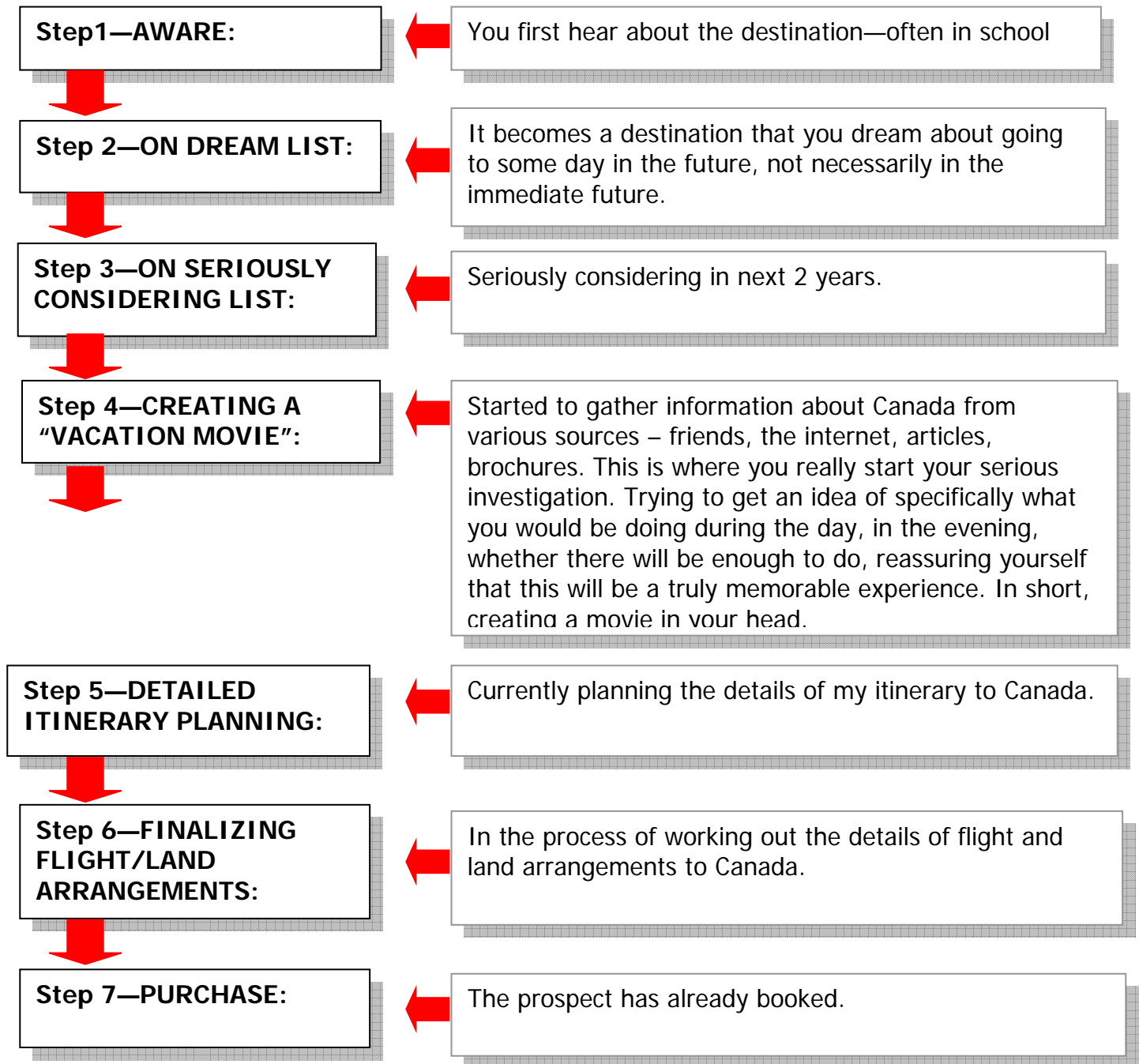
- The Buy Cycle Model was developed by Insignia during three separate tourism studies in China, Taiwan and South Korea examining in a real life environment the step by step planning process. The Buy Cycle was then subsequently evaluated in 18 focus groups in Europe--the U.K., France and Germany. Those discussions further validated that this is the way people think. Finally, Insignia built a quantitative question into the 3 studies to measure where people are on the Buy Cycle path and where the barriers are. The findings confirm the focus group learning and direct us toward the importance of helping prospects build their own "movie".



8.1 The Buy Cycle Model – France

- The model is described below:

EXHIBIT SECTION 8-1: THE BUY CYCLE MODEL — HOW IT WORKS



8.1 The Buy Cycle Model – France

b) Buy Cycle Influencers - General

- The key influencers that drive prospective travellers to each stage are outlined below:

Step 1 – First Aware

- Awareness generally starts early in life, usually in school.

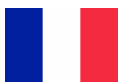
Step 2 – Getting on the Dream List

- There are two common influencers that get a destination on the initial “dream list”.
 1. Travellers have seen a television program, travel show, a memorable image, or read an article about a destination that triggers a deep interest:
 - *“I must go there some day”*
 2. Friends who have previously visited are also very influential:
 - *“You must go there as well”*
 - *“Let me show you our slides/pictures”*
- To some degree, there is social pressure here to conform as well as to bond with a common experience.

8.1 The Buy Cycle Model – France

Step 3 – Getting on the Serious Consider List

- Something happens here to move a long term trip dream toward reality.
- Without a doubt, the most common influence here is the advice and persuasion of friends.
 - *“My friends were going so I followed their advice”*
 - *“Friends told me about their trip”*
 - *“My friends said you have to go”*
 - *“Friends showed films”*
- Probing on what friends had communicated to convince them to seriously consider going uncovered a persuasion largely based on emotion:
 - *“It is a wonderful trip”*
 - *“You have to go”*
 - *“Really great fun”*
 - *“You’ll meet lovely people”*
- Clearly, there is a peer pressure here as well as status motivators at play.
- Other influencers include:
 - Checked prices and they looked affordable
 - Some event is happening in the country which is considered a must see
 - A TV report that stimulates immediate interest



8.1 The Buy Cycle Model – France

Step 4 – Creating a Detailed “Movie”

- This is the stage where the travel tries to create a detailed picture of what the vacation is and should be like, now that the decision to go has been made. This stage leads to the decision of what kind of vacation product to buy.
- Common sources include:
 1. Friends once again are extremely important sources of advice – where to go, what to see, how long to spend at each place.
 2. Travel guides ‘Guide du Boutard’
 3. The internet
 - ***“There are hundreds and hundreds of sites I can click on”***
 4. Travel agency brochures
- The most common types of sites searched appear to be:
 - Official tourism sites
 - Tour operator sites
 - Government sites
 - Cheap travel sites
- Often travellers will simply enter the country name (e.g., Canada) and perhaps “travel” in a general search engine to begin the process. This confirms how important it is for the CTC in France to have techniques in place to land at the top of the search engine results.

8.1 The Buy Cycle Model – France

Step 5 – Detailed Itinerary Planning

- Planning direction depends a great deal on two factors:
 - Age
 - Familiarity/comfort with destination
 - Younger or middle aged travellers are far more likely to book air only and travel “a la carte” using a guide book.
 - Over 50 travellers are much more likely to buy a tour or FIT package, not wanting to leave as much to chance and having greater reassurance of a smooth, trouble free journey.
 - For less familiar, more adventurous destinations (e.g., Southeast Asia, China), pre-paid packages are quite common.
 - For more comfortable destinations or repeat visits “a la carte” is preferred (this includes Canada, as discussed later).

Step 6 – Finalizing Flight/Land Arrangements

- More and more French people are buying direct on the internet. They are convinced that they will save money doing so. There is very little reluctance to book online.
- Further, more travellers are opting for air only, especially to Canada.

Step 7 – Purchase

- The trip is now sold.



8.1 The Buy Cycle Model – France

c) Buy Cycle Influencers - Canada

- With Canada, the Buy Cycle influencers are similar to other long-haul destinations.

Step 1 – First Aware

- Awareness generally starts in school, particularly learning about French Canada.

Step 2 – Getting on the Dream List

- *“Saw a film on Canada”*
- Long held dream “to see French Canada way of life”.
- A recent movie about a trapper in Canada (very popular)

Step 3 – Getting on the Serious Consider List

- Here are the kinds of stimuli that got Canada on the near term consider list:
 - *“Past visitor recommendations”*
 - *“My son was there”*
 - *“Saw a TV program”*
 - *“Husband gave me a book on Canada for my birthday”*
 - *“Saw recent film on Canada – a brilliant, ambitious doctor who went there”*
 - *“Friends in Quebec”*
 - *“My mother wants to go for her 70th birthday”*



8.1 The Buy Cycle Model – France

Step 4 – Creating a Detailed “Movie”

- The whole process here is about building a trip concept – including an itinerary and stops/sites to see along the way.
 - *“Went to agency for tour information”*
 - *“Guide du Boutard”*
 - *“Michelin guide”*
 - *“Looked at a map”*
 - *“Search the net – click on pictures”*
 - *“Read blogs”*
 - *“Read novels on Canada”*
 - *“Asked people who had been there”*

Step 5 – Detailed Itinerary Planning

- Younger/middle aged travellers have a strong preference for FIT “a la carte” – booking air only and car rental and exploring on their own.
- The fact that Quebec in particular is French speaking makes them very comfortable to travel FIT – no package.
- Older (50+) travellers also want independence, but may opt for tours as with the other destinations, for comfort and predictability.

Step 6 – Finalizing Flight/Land Arrangements

- Booking direct on the internet is highly common.

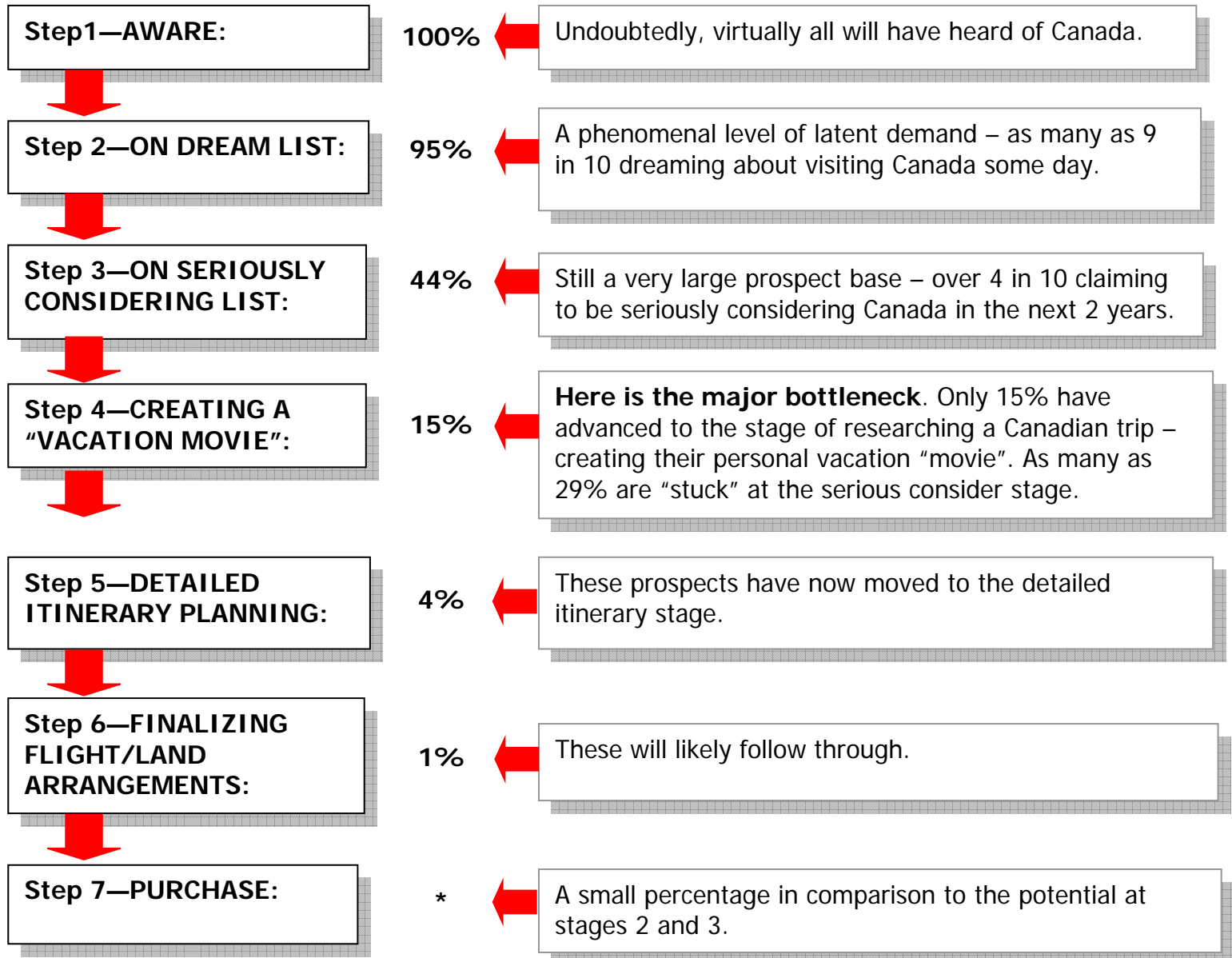


8.1 The Buy Cycle Model – France

d) Bottlenecks and Barriers – Canada

- The chart below illustrates how far the long-haul travel market has advanced along the Buy Cycle path for a trip to Canada.

EXHIBIT SECTION 8-2: THE BUY CYCLE MODEL – BOTTLENECKS AND BARRIERS - CANADA

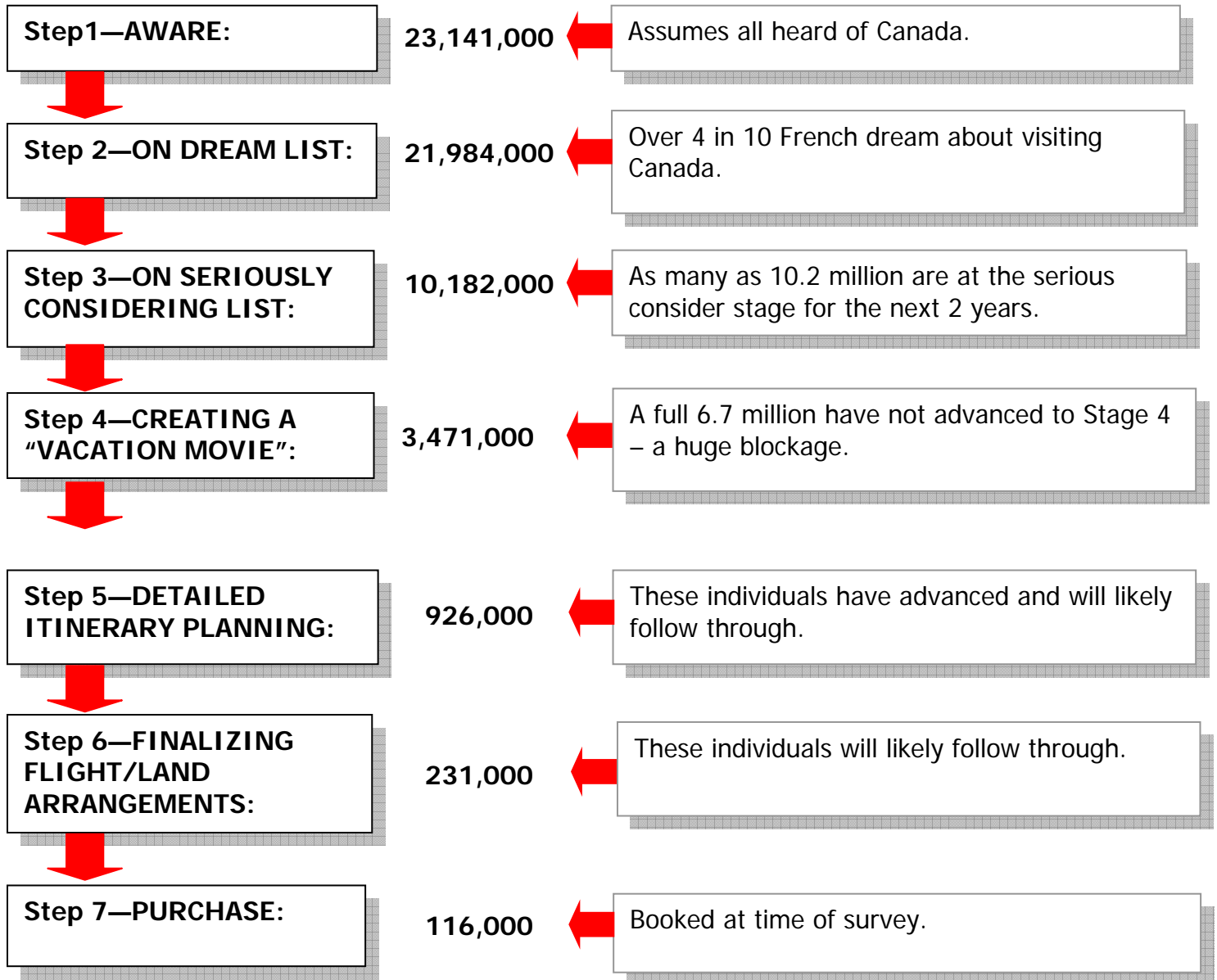


8.1 The Buy Cycle Model – France

e) Projected Market Size

- There are 23.1 million potential long-haul travellers in France out of a population of 49,131,000 age 18 and over.

EXHIBIT SECTION 8-3: THE BUY CYCLE MODEL – PROJECTED MARKET SIZE



8.1 The Buy Cycle Model – France

Implications

- The Partners need to focus more on **Stage 4** – helping serious prospects create their personal Canadian vacation movie, rather than building initial awareness, (Stage 1), getting Canada on the Dream List (Stage 2) or even on the Serious Consider List (Stage 3).

Access to Detail

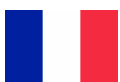
- To create a “movie”, prospects need access to detail – especially itinerary ideas.
- Given the importance of the internet they must be strongly encouraged to visit the most appropriate Canadian websites.
- Once on these sites they need help in creating itinerary ideas.
- Then, to elaborate on key attractions and locations on route, short video clips can work very effectively, as well as any other descriptive material that will aid the prospect in visualizing him/herself in the scene having a wonderful time.
- Blogs from past visitors are also welcome, as long as they are trustworthy as legitimate experiences by real travellers.

Viral Marketing

- Friends, especially previous visitors or residents are so highly influential that the Partners need to seriously explore viral marketing ideas.
- Ways must be developed to encourage friends or past visitors to “spread the word”.

Itinerary Ideas

- One of the reasons agent/operator brochures are popular sources of “movie” planning is because they provide itinerary ideas and help the prospects get their heads around their personal vacation concept. Consequently, advertising can focus on promising “brilliant” itinerary ideas on the CTC/partners website.



8.1 The Buy Cycle Model – France

Fighting Procrastination

- Facilitating personal “movie” creation helps the prospective visitor to stimulate themselves and drive them toward moving on their dream.
- However, industry advertising for low cost flights help to communicate viability (“Canada seems so much closer when the fare is so low”), as do ads featuring special events.
- Procrastination is Canada’s worst enemy. Helping prospective visitors generate their own excitement is the best route to stimulating near term travel.



Section 9: Regional Opportunities

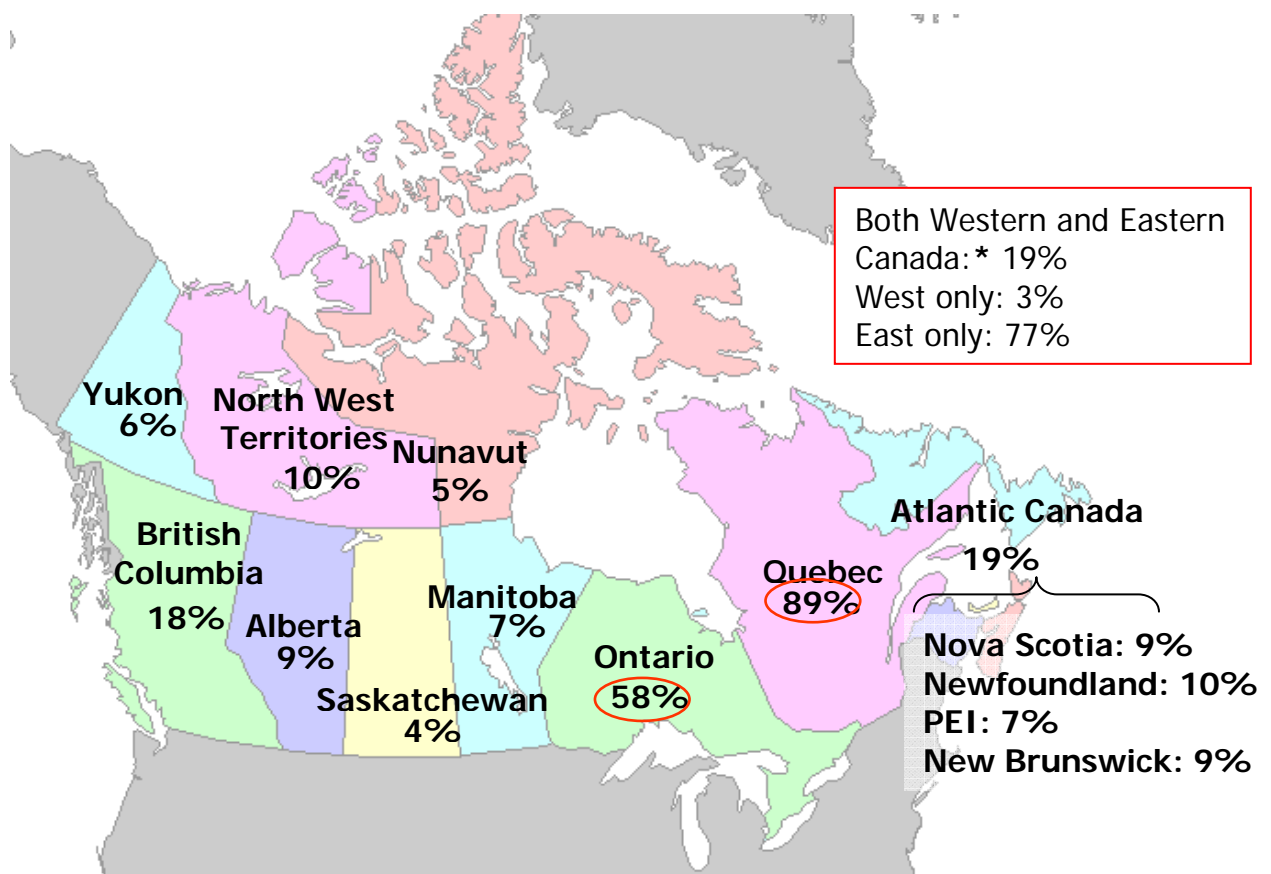
9.1 Places Visited in Canada

Quebec is clearly the preferred province for the French—89% visiting it on their last trip. This compares to 88% in 1997. However, note that Ontario received as many as 58%.

The French prefer to focus on either Western or Eastern Canada—only 19% travelling to both regions of the country on their last trip.

Atlantic Canada, British Columbia and the Territories are equally popular secondary regions.

EXHIBIT SECTION 9-1: PLACES VISITED IN CANADA



Source: Quantitative Survey Q.8b1

¹ Base = Past 3 years travellers to Canada (n=719)

Q. 8b **IF CANADA IN Q. 8a) ASK)** While you were in Canada on that trip, which of the following places did you visit, if any?

***Eastern Canada includes Ontario, Quebec and Atlantic Canada**

Western Canada includes Manitoba, Saskatchewan, Alberta, British Columbia

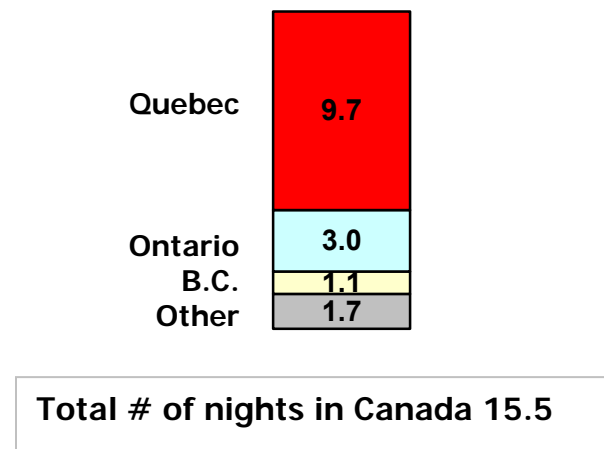


9.2 Duration – By Province

Quebec captured an average of 9.7 nights of the 15.5 spent in Canada. However, Ontario managed to attract visitors for 3.0 nights overall.

EXHIBIT SECTION 9-2: NUMBER OF NIGHTS SPENT IN EACH PROVINCE

Among Past 3 Years Travellers to Canada



Source: Quantitative Survey Q.10d¹

¹ Base= n=719

Q. 10d **(IF CANADA IN Q. 8a) ASK (ONLY LIST PLACES VISITED IN Q. 8b)** How many nights did you spend in each area on that trip?



9.3 Trip Characteristics

British Columbia/Alberta

These provinces are analyzed together as a region due to the small sample size to each individual province.

The French vacationing in the BC/Alberta region usually include it as an extension of a visit to Eastern Canada.

However, they regard the trip out west as an important part of the journey, spending 7.7 out of 14.5 nights in Canada within the 2 provinces.

Other trip characteristics:

- Season – Spring and Summer preferred.
- FIT – 84% FIT, as many as 39% no package.
- Accommodation—Hotels are most common with a wide range of alternative accommodation popular—VFR, B&B's, cabins/cottages, camping or on a farm.
- Purpose of Trip--Beyond nature, visitors sought out interacting with local people, local culture, and to realize a long term dream.

Ontario

The French who are visiting Ontario are usually doing it in conjunction with a visit to Quebec (88% both provinces).

The Ontario visit accounts for 5.1 nights on average vs. 15.9 in Canada, so it is a lesser although significant part of the trip.

Other trip characteristics:

- Season – Spring and Summer most common.
- FIT – 76% FIT, but a good deal of organized group travel (24%).
- Accommodation – City hotels/motels dominate, but home of friends or relatives and B&B's popular.

9.3 Trip Characteristics

- Purpose of trip – natural scenery (undoubtedly including Niagara Falls), seeing Canadian cities and meeting up with friends and/or relatives are also very important draws to Ontario

Atlantic Canada

Those going to Atlantic Canada are also visiting Quebec on the trip (86%). They are not limiting their trip to adjoining New Brunswick but are venturing into all 4 provinces.

However, the stay is relatively short—3.6 nights out of 14.0 in Canada.

Other trip characteristics:

- Season –July to September.
- FIT – 77% FIT. As with Ontario, a significant minority on a group tour (23%).
- Accommodation – trip accommodations are mainly hotels/motels but B&B's, cottage/cabins and staying on a farm quite popular.
- Purpose of trip – Enjoying nature predictably dominates, but entertainment and festivals are also unusually common.

Quebec

The dominant provincial attraction, the French visiting this province often take a side trip into Ontario (58%), but most of their time is spent in the province—11.0 nights out of 15.8 in Canada. Other trip characteristics:

- Season –April to September
- FIT—78%, 51% no package. Group accounts for 22%.
- Accommodation-- trip accommodations are mainly hotels/motels but B&B's, cottage/cabins quite popular. One in three stay with friends or relatives.
- Purpose of trip – Enjoying nature dominates, but interacting with local people, experiencing local culture and seeing new places also common.



9.3 Trip Characteristics

EXHIBIT SECTION 9-3: TRIP CHARACTERISTICS — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132)	(416)	(639)	(140)
	%	%	%	%
<u>Other Canadian Regions Visited</u>				
<u>Western Canada (net)</u>	<u>100</u>	<u>28</u>	<u>18</u>	<u>46</u>
British Columbia	94	21	14	37
Alberta	48	10	7	20
Saskatchewan	16	6	3	16
Manitoba	17	11	6	18
Yukon/NWT/Nunavut	27	15	11	29
<u>Eastern Canada (net)</u>	<u>83</u>	<u>100</u>	<u>100</u>	<u>100</u>
Ontario	67	100	58	68
Quebec	72	88	100	86
Atlantic	39	23	19	100
Nova Scotia	24	11	9	48
Newfoundland/Labrador	27	13	10	50
PEI	19	9	6	34
New Brunswick	16	10	10	46
<u>Duration (Avg)</u>				
<u>Total nights on trip</u>	<u>20.8</u>	<u>21.9</u>	<u>21.2</u>	<u>19.0</u>
<u>Nights in Canada</u>	<u>14.5</u>	<u>15.9</u>	<u>15.8</u>	<u>14.0</u>
<u>Nights in province</u>	<u>7.7</u>	<u>5.1</u>	<u>11.0</u>	<u>3.6</u>
<u>Month of Travel</u>				
January-March	17	11	12	15
April-June	28	27	27	24
July-September	42	46	46	46
October-December	13	16	15	15
<u>FIT vs. Group</u>				
<u>Total FIT</u>	<u>84</u>	<u>76</u>	<u>78</u>	<u>77</u>
FIT – benefit package	45	29	28	41
FIT – no package	39	46	51	38
<u>Total Group</u>	<u>16</u>	<u>24</u>	<u>22</u>	<u>23</u>

9.3 Trip Characteristics

	<u>Visited on Recent Canadian Trip</u>			
	<u>BC/Alberta</u>	<u>Ontario</u>	<u>Quebec</u>	<u>Atlantic</u>
	(132) %	(416) %	(639) %	(140) %
<u>Type of Accommodation</u>				
Mid-priced city hotel/motel	46	58	52	53
Luxury city hotel	35	24	20	28
Home of friend or relative	23	30	32	32
Budget city hotel	17	14	14	15
Resort hotel	8	8	7	8
Bed and breakfast	19	19	20	26
Authentic wilderness lodge	8	7	8	10
On a cruise ship	1	*	*	1
Cottage/cabin	10	9	10	15
Camping	10	4	4	8
On a farm	10	5	3	10
Guest ranch	4	1	1	4
Caravan/motor home	4	2	2	5
Other	4	8	7	5
<u>Trip Expenditure</u>				
Under €2,000	19	25	25	25
€2,000-<€4,000	30	33	33	34
€4,000-<€6,000	22	23	24	22
€6,000-<€8,000	8	8	8	10
€8,000+	21	12	11	9
Mean (€ Euro)	5,700	4,500	4,500	4,400
<u>Value for Money</u>				
Excellent value	28	25	22	30
Very good value	36	35	35	36
Good value	30	31	35	26
Fair value	6	8	8	9
Poor value	-	*	1	-
<u>Recommended to Others</u>				
Definitely will	61	68	67	65
Very likely	35	25	24	27
Somewhat likely	4	6	7	8
Not likely	-	1	1	-

*Less than 5%

9.3 Trip Characteristics

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132) %	(416) %	(639) %	(140) %
<u>Purpose of Trip – All</u>				
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	79	84	79	83
To see new places	49	57	52	53
To experience local culture	41	47	46	37
To interact with the local people	57	65	62	62
To relax, unwind and decompress	34	35	32	37
To visit historic sites, museums, or galleries	35	38	37	37
To realize a long term dream	42	38	36	39
To visit friends and relatives	30	30	33	29
To visit protected areas, including nature reserve, regional or national parks	56	50	46	52
To view aboriginal sites and events	26	30	26	29
To see and watch wildlife	42	41	38	46
To go shopping	29	28	25	23
To experience big cities in another county	27	34	29	28
To be together as a family	19	20	18	20
Low rates, good deals, and discounts	9	8	7	6
To participate in outdoor activities	16	14	15	18
For entertainment and nightlife	16	12	11	16
To attend festivals and/or events	22	17	15	21
A trip that combined business with pleasure	16	10	7	15
Honeymoon	9	6	4	9
To visit a spa, health centre, or hot springs	7	3	2	4
To go downhill skiing or snowboarding	10	4	4	12
Other reason	3	4	6	4

Source: Quantitative survey Q.8b, 9a, 10, 11, 16, 18, 19b-d¹

- ¹ Q.8b **(IF CANADA IN Q. 8a) ASK** While you were in Canada on that trip, which of the following places did you visit, if any?
- Q.9a What were your reasons for travelling to **(Q.8a DESTINATION)**
- Q.10 On that trip to **(Q. 8a) DESTINATION**, how many nights, in total, were you away from home?
- Q.11 And when did you take that trip to **(DESTINATION IN Q.8a)**
- Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?
- Q.18 In what type of accommodation did you stay?
- Q.19b What was the total cost of that trip to **(DESTINATION IN Q. 8a)** for you and your immediate travel party, including airfare and all other costs?
- Q.19c Overall, how would you rate that trip on value for money – excellent, very good, good, fair, poor value for money?
- Q.19d How likely are you to recommend that destination to others?



9.4 Activities Participated In

The activities data are trip based, not province or region based so one must be carefully trying to extrapolate the results to any particular region.

That said, the following tables do show that certain activities are more common when particular provinces are in the itinerary—for example:

British Columbia/Alberta

Heightened activity with viewing mountains, seeing coastlines, wine/culinary tours, rail tours, studying English, attending festivals/special events, viewing glaciers, hot springs, skiing, sports fishing and trail riding.

Clearly, the French traveller is getting out into and involved with nature.

Ontario

The activities that stand out as likely relating to Ontario are visiting casinos, studying English, wine/culinary tours, attending festivals/special events, aboriginal experiences, visiting world heritage sites and taking a cruise (e.g. in the Thousand Islands).

Atlantic Canada

Seeing coastlines, old architecture, world heritage sites , boat cruises/ferries, attending festivals/fairs and whale watching.

Quebec

Getting to know local inhabitants tops the activity list but urban tours, cuisine and visiting small towns round out the top four.

*Less than 0.5%



9.4 Activities Participated In

EXHIBIT SECTION 9-4: ACTIVITIES PARTICIPATED IN — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIP

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132) %	(416) %	(639) %	(140) %
<u>Activities Participated In</u>				
Getting to know the local inhabitants	81	90	91	82
Taking city tours	85	90	87	83
Fine dining	74	81	79	76
Visiting small towns	73	81	78	78
Visiting places of historical interest	72	81	78	78
Taking nature tours	79	77	77	81
Seeing beautiful beaches and coastlines	59	47	43	61
Seeing old architecture	62	67	66	73
Visiting wilderness areas	78	73	71	79
Viewing rivers or waterfalls	81	88	83	84
Visiting museums or art galleries	66	66	62	68
Sunbathing or other beach activities	37	24	24	41
Visiting world heritage sites	57	63	58	64
Viewing mountains	81	68	69	77
Taking a cruise	54	54	47	56
Trekking in a nature area	59	62	64	68
Taking a garden or flower tour	49	49	46	54
Aboriginal cultural experiences, celebrations, and attractions	46	48	41	50
Observing wildlife in their natural environment	72	69	68	76
Seeing modern architecture	70	75	69	74
Visiting friends or relatives	54	47	47	53
Attending theatres, clubs or shows	38	30	29	38
Canoeing/kayaking/boating	35	35	30	35
Attending festivals or fairs	51	45	38	49
Staying at a luxury resort	24	13	11	24
Cycling	37	20	20	27
Taking wine/culinary tour	30	24	20	29
Taking a rail tour	29	17	15	25
Visiting casinos	28	22	16	23
Studying English	37	23	19	29
Visiting a spa	28	12	10	22
Whale watching	41	48	41	48

9.4 Activities Participated In

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132) %	(416) %	(639) %	(140) %
<u>Activities Participated In</u>				
Viewing autumn leaves	31	37	32	39
Sport fishing	28	16	14	26
Attending professional sporting events	29	19	14	23
Camping in a natural setting	18	8	9	16
Trail riding on horseback	24	10	11	18
Visiting hotsprings	24	7	6	17
Viewing glaciers	55	19	18	32
Viewing Aurora Borealis (Northern Lights)	32	12	10	18
Golfing	18	6	6	12
Dog sledding	30	15	16	24
Attending rodeos	24	10	6	19
Downhill skiing or snowboarding	23	7	6	16
Heli/cat skiing	23	7	6	16
Hunting	17	6	4	15

Source: Quantitative Survey Q.19a¹

¹ 19a) Which, if any, of the following activities did you participate in while on that trip to
(DESTINATION IN Q. 8a



9.5 Travel Party

For each region, typical travel parties include:

- Spouses/significant others (60% to 69%)
- Adults only (82% to 86%)
- More than one person (88% to 91%)



9.5 Travel Party

EXHIBIT SECTION 9-5: TRAVEL PARTY — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CANADIAN TRIPS

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132) %	(416) %	(639) %	(140) %
<u>FIT vs. Group</u>				
Immediate party only	84	76	78	77
Part of larger group	16	24	22	23
<u>Party Composition</u>				
Spouse/significant other	66	60	60	69
Friends	13	14	14	10
Travelled alone	9	10	12	9
Children	18	16	14	17
Parents	4	7	7	5
Organized group/club	2	11	9	6
Other relatives	10	10	8	11
Business associates/colleagues	3	5	4	3

Source: Quantitative survey Q.12, 16¹

¹ Q.12 With whom did you travel on that trip to **(DESTINATION IN Q.8a)**

Q.16 On that trip, did you travel with your immediate party only or as part of a larger group tour?

9.6 Trip Planning

British Columbia/Alberta

- Friends and relatives are prime sources of inspiration to travel to Canada and to include BC/Alberta. However, television travel shows, magazine and newspaper stories and films were also very influential.
- These confirm how important public relations and media exposure can be.
- The internet, used more for planning purposes, is a source of inspiration for 29%.
- The lead time is shorter than for Eastern Canada
 - 25.3 weeks planning in advance
 - 12.6 weeks booking in advance
- Only half book through an agent, while direct to airline is almost as large (at 47%) and hotel at 19%.

Ontario

- As with the rest of Canada, friends and relatives are prime sources of inspiration to travel.
- Travel agents/tour operators are influential for 18%--a reminder that the trade can have a significant influence in selling specific regions of the country, even though their role in influencing Canada as a destination may be diminished (see later discussion in Trade Section).
- The internet, used more for planning, is a source of inspiration again for only 21%.
- The planning time is longer than for Western Canada (36.2 weeks planning, 14.4 for booking).
- Travel agents book just over half of trips (56%), direct to airlines very popular (35%).



9.6 Trip Planning

Atlantic Canada

- As with Western Canada visitors, the French who venture into Atlantic Canada are often inspired by news stories, television travel shows and magazine/ newspaper articles.
- Internet as an influencer is at 24%. The average planning lead time is similar to Quebec – 39.2 weeks planning, 18.9 weeks booking.
- Just over half (56%) of trips are booked through agents – the rest direct.

Quebec

- The news media and television shows help to bring Quebec into focus and motivate action on the part of prospective French travellers. However, friends and relatives as always contribute greatly to the “you must visit Quebec” drive.
- The internet, more for planning than inspiration is back at 20% as an inspiration trigger.
- Lead time:
 - 41.9 weeks planning in advance
 - 17.3 booking
- Many are booking direct – airlines at 38%, hotels at 11%. Agents are involved only half the time in booking (53%).

9.6 Trip Planning

EXHIBIT SECTION 9-6: TRIP PLANNING — AMONG THOSE WHO VISITED B.C., ALBERTA, ONTARIO, AND ATLANTIC ON MOST RECENT CAR TRIP

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlanta
	(132)	(416)	(639)	(140)
	%	%	%	%
All Source of Inspiration for Trip Planning				
Friend or relative	51	50	50	48
Television travel shows	25	14	14	22
The internet	29	21	20	24
Destination travel guide	18	16	14	17
Saw a film on destination	11	6	5	9
Travel agent/tour operator	13	18	15	15
Story in magazine or newspaper	17	9	10	18
Other television show	9	4	3	8
Business reasons	5	4	4	3
Consumer travel trade show	7	5	5	6
Direct mail or email advertising	6	4	2	7
A news story	18	18	16	26
Celebrity travelled there	2	1	*	2
Planning Horizons				
Average # of weeks	25.3	36.2	41.9	39.2
Booking Horizons				
Average # of weeks	12.6	14.4	17.3	18.9
How Trip Was Booked				
Booked through a travel agent/package provider (net)	56	56	53	56
In person	33	38	35	37
Online	15	14	13	13
Via phone	10	5	6	11
Airline (net)	47	35	38	37
Via their website	32	23	28	24
Via phone, email or in person	15	12	11	14
Hotel (net)	19	14	11	18
Via their website	19	13	9	17
Via phone	4	3	2	5
Other online travel supplier	6	6	4	12
Other	4	9	11	10
Total Online	72	56	55	65

Source: Quantitative Survey Q.14a, 15 a-c¹

*Less than 0.5%

¹ Q.14a Were any of the following a source of inspiration for you to decide to travel to (DESTINATION IN Q.8A).

Q.15a How long before your trip did you definitely decide to go on that trip to (DESTINATION IN Q.8a)

Q.15b And how long before your trip did you actually book it?

Q.15c How did you book that trip?



9.7 Traveller Profile

- The profiles of visitors to each region are very similar:
 - Relatively young – typically under 50 years of age, at least half under 40
 - Residing throughout France—Paris only accounting for 13% to 23%
 - Four in ten with close connections in Canada
 - Usually married/living together
 - Employed and well educated
 - Incomes over 2,300 Euros per month or more

9.7 Traveller Profile

EXHIBIT SECTION 9-7: PROFILE OF THOSE WHO VISITED B.C., ALBERTA, ONTARIO AND ATLANTIC ON MOST RECENT CANADIAN TRIPS

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132) %	(416) %	(392) %	(142) %
<u>Age</u>				
18-29	28	26	23	29
30-39	32	26	27	21
40-49	23	23	25	28
50-59	11	14	13	11
60+	7	11	13	11
<u>Gender</u>				
Male	53	50	52	54
Female	47	50	48	46
<u>City</u>				
Paris-Isle-of-France	18	23	23	13
Burgundy/Champagne-Ardenne/Picardy	4	6	5	4
Center/Lower-Normandy/Upper-Normandy	11	10	7	14
North-Calais	7	7	6	7
Alsace/Franche-comte/Lorraine	8	7	8	7
Brittany/Pays-de-la Loire/Poitou-Charentes	12	13	13	14
Aquitaine/Limousin/Midi-Pyrenees	13	10	11	12
Auvergne/Rhone-Alps	13	14	14	15
Corsica/Lanquedoc-Roussillon/Provence-Alpes-Azus	15	11	13	15
<u>Close Friends/Relatives in Canada</u>				
Yes	39	42	45	41
No	60	57	54	57
<u>Marital Status</u>				
Married/living with someone	77	73	73	75
Single	17	21	20	18
Divorced/widowed/separated	4	6	7	6
<u>Household Composition</u>				
Adults only	44	55	55	47
With children<18	56	45	45	53



9.7 Traveller Profile

	Visited on Recent Canadian Trip			
	BC/Alberta	Ontario	Quebec	Atlantic
	(132) %	(416) %	(639) %	(140) %
<u>Occupation</u>				
Total employed	72	69	66	65
Senior unskilled manual worker	1	2	2	2
Skilled manual worker	4	5	4	5
Supervisory or clerical/junior managerial/professional/administrative	17	21	19	15
Intermediate managerial / professional /administrative	20	18	19	21
Higher managerial / professional/ administrative	18	14	14	16
Self employed	12	6	5	3
Employed part time	1	3	3	2
Student	7	6	7	6
Housewife/husband	2	3	2	4
Retired/semi –retired	7	11	14	11
Other	11	8	7	10
<u>Education</u>				
Less than secondary school	-	-	*	-
Higher education	40	38	34	34
University	29	25	28	31
Graduate School	15	11	13	11
<u>Household Income (monthly gross €)</u>				
Under €1,500	13	9	9	12
€1,500 - <€2,300	9	16	14	9
€2,300 - <€2,800	15	15	12	14
€2,800 - <€3,800	23	23	24	30
€3,800+	31	26	28	25

Source: Quantitative Survey Q.1,2,3a,28-34 (basic data)

*Less than 0.5%

CAD Equivalent (Bank of Canada exchange rate, November 21, 2007)

<€1,500 = <\$2,201 CAD

€1,500 - <€2,300 = \$2,201 - \$3,374 CAD

€2,300 - <€2,800 = \$3,374 - \$4,108 CAD

€2,800 - <€3,800 = \$4,108 - \$5,575 CAD

€3,800+ = \$5,575+ CAD



Section 10: Claimed Barriers to Canada Travel

10.1 Major Barriers to Canada Travel

Concern about cost predictably surfaces as the top reason for procrastinating on a trip to Canada.

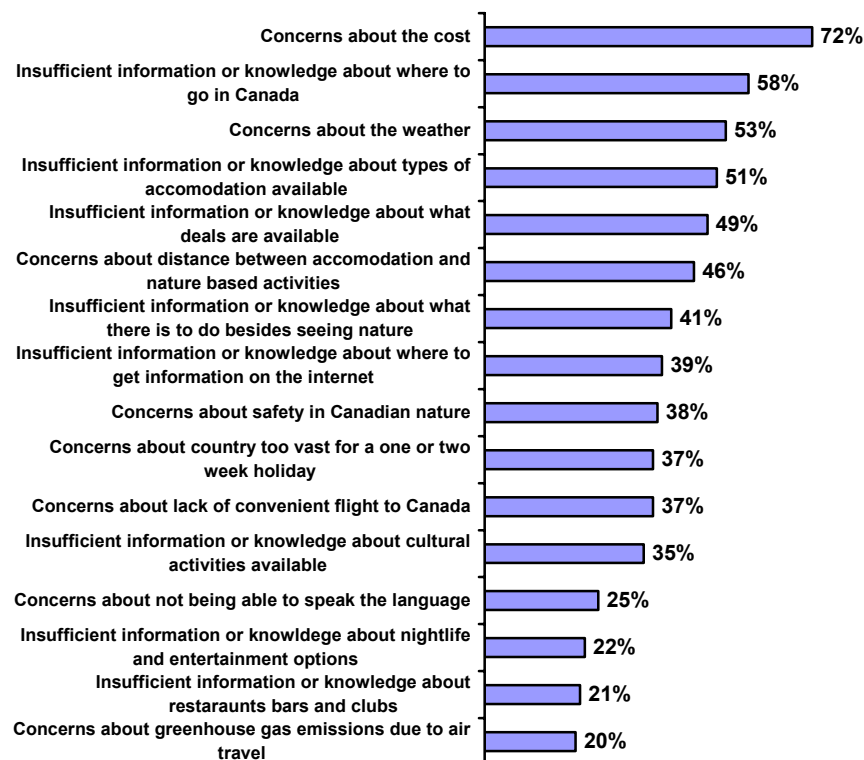
However, among the key barriers are opportunities. With Canada so high on the dream list, it appears that all the French need to markedly increase visits are more specific details on what they can do in Canada and what is really worth the trip.

Many of the other chief concerns are also about the need for information. However, in 3rd position is a weather concern.

EXHIBIT SECTION 10-1: MAJOR BARRIERS TO CANADA TRAVEL

Among Those Not Likely to Visit Canada in Next 12 Months

Extremely/Very Important Barriers*



Source: Quantitative Survey Q. 26¹

¹ Base=n=1,084

Q.26 Some people are very interested in visiting Canada, yet have decided to put the trip off to a later year. From your personal point of view, how important are each of the following factors, if at all, in **preventing you from travelling to Canada in the next 12 months?**

* The list of potential barriers was derived from the focus groups. The question uses a scale approach to measure the magnitude of each of the prospective barriers.



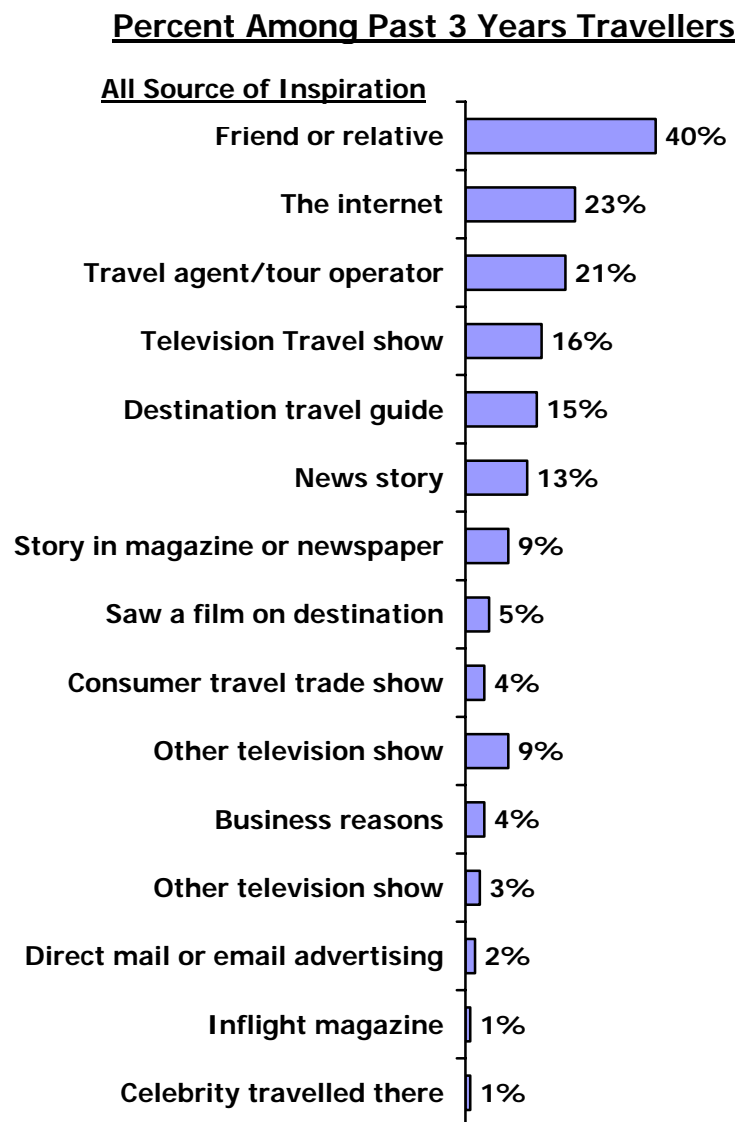
Section 11: Media

11.1 Source of Inspiration

Friends and relatives are the principle source of inspiration for choosing a destination. This came up in the focus groups as well and reminds travel marketers of the value of viral marketing—encouraging individuals to influence their friends.

The internet ranks second.

EXHIBIT SECTION 11-1: ALL SOURCE OF INSPIRATION — BY ALL DESTINATIONS



Source: Quantitative Survey Q.14a¹

¹ Base=n=1,749



11.2 Source of Inspiration – by Destination

For trips to Canada, beyond friends and relatives, television shows and news stories, all helped to inspire recent travel. Travel agents and destination travel guides still form an important role, in spite of a shift away from booking through agents.

The fact that the internet only inspired 19% to choose Canada suggests that it still functions more as a planning tool rather than a source of inspiration or lure.

EXHIBIT SECTION 1 1-2: ALL SOURCE OF INSPIRATION – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia	Caribbean	U.S.	Canada
	(324) %	(216) %	(277) %	(719) %
<u>Source of Inspiration - All</u>				
Friend or relative	34	39	51	50
The internet	24	25	22	19
Travel agent/tour operator	20	28	11	16
Television travel shows	24	10	15	14
Destination travel guide	16	18	13	13
News story	18	5	15	16
Story in magazine or newspaper	12	8	9	10
Saw a film on destination	8	2	6	5
Consumer travel trade show	6	3	3	5
Business reasons	6	3	5	4
Other television show	6	*	4	3
Direct mail or email advertising	3	2	1	3
Inflight magazine	2	1	2	1
Celebrity travelled there	2	1	1	1

Source: Quantitative Survey Q.14a

*Less than 0.5%

Q.14a Were any of the following a source of inspiration for you to decide to travel to (DESTINATION IN Q.8A)?

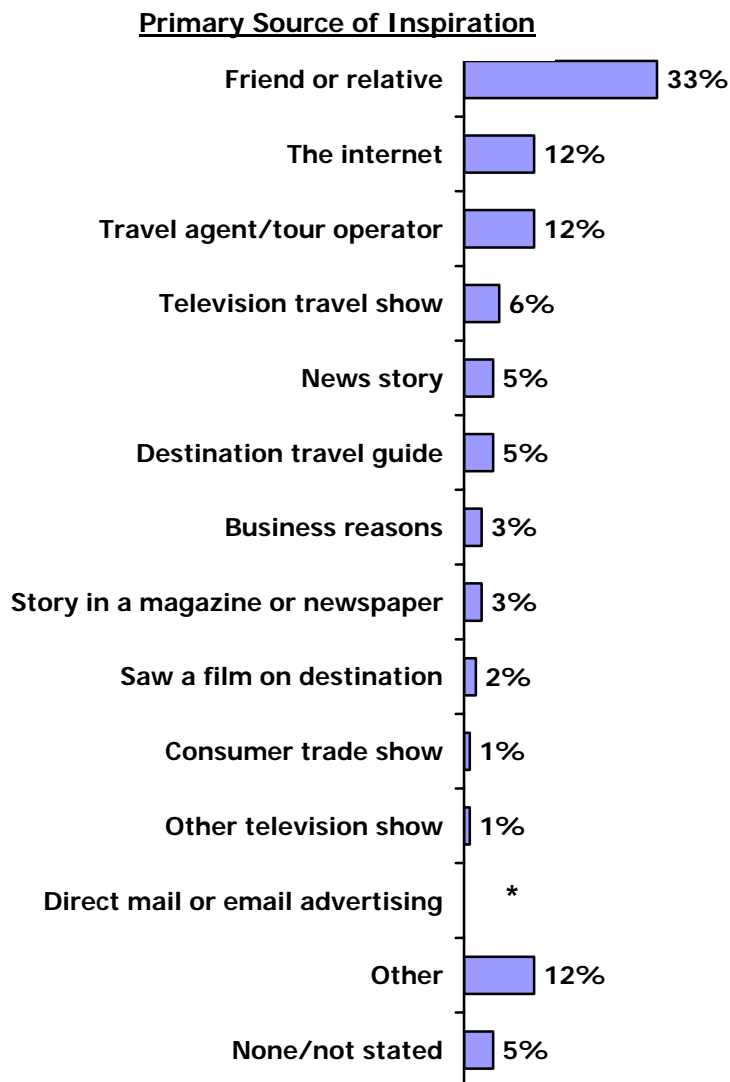


11.3 Primary Source of Inspiration

Friends and relatives are by far the dominant influencer for long-haul travel. With so many choices available to travellers and the importance of sound advice, it is not a surprising finding.

EXHIBIT SECTION 1 1-3: PRIMARY SOURCE OF INSPIRATION – BY ALL DESTINATIONS

Percent Among Past 3 Years Travellers



Source: Quantitative Survey Q.14b¹

¹ Base=n=1,749

Q.14b Which of those was the main source of inspiration for choosing that destination?

*less than 0.5%



11.4 Primary Source of Inspiration – by Destination

Friends have been very inspiring for recent Canadian travellers. Again, the internet was the primary source of inspiration for only a fraction of travellers—7% to Canada.

EXHIBIT SECTION 1 1-4: PRIMARY SOURCE OF INSPIRATION – BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
<u>Primary Source of Inspiration</u>				
Friend or relative	24	32	41	41
Television travel shows	12	4	4	5
The internet	11	16	12	7
Destination travel guide	6	3	3	5
Travel agent/tour operator	9	17	3	9
Saw a film on destination	2	*	2	1
Business reasons	4	2	4	3
Other television show	2	-	1	*
Story in magazine or newspaper	3	3	2	2
Direct mail or email advertising	1	-	-	*
Consumer travel trade show	1	1	3	2
News story	6	3	6	5
Other	16	14	16	13
None/not stated	3	6	6	6

Source: Quantitative Survey Q.14b

Q.14b Which of those was the main source of inspiration for choosing that destination?

*Less than 0.5%



11.5 Specific Sources Used for Trip Decision

Television shows on travel are very common in France.

Talassa/Thalassa is the most influential television program in France. The Travel Channel and Voyage also have major impact. Reportage, Lonely Planet and Ushuaia are also on the list.

EXHIBIT SECTION 1 1-5: SPECIFIC TV TRAVEL SHOW AND OTHER TV SHOWS USED

Percent Among Travellers Using Each Medium

<u>Television Travel Shows (n=268)</u>		<u>Other Television Shows Used (n=55)*</u>	
<u>Major Mentions</u>	<u>%</u>	<u>Major Mentions</u>	<u>%</u>
Talassa/Thalassa	22	Reportage	16
Travel Channel (non specific)	18	Talassa/Thalassa	12
Voyage	13	Other TV channels	11
Lonely Planet/Planet	9	Ushuaia	10
Ushuaia	9	Travel program/shows (non specific)	9
Des Racines et des Ailes	5	Various shows	6
Other TV channels	3	New York Series	4
J'irais Dormir chez vous	3	Des Racines et des Ailes	3
Reportage	3	Faut Pas Rever	3
Geo	3	Travel Channel (non specific)	3
Faut Pas Rever	2		

Source: Quantitative Survey Q.14 c, d

* Caution = small base size

Q.14c **(IF TELEVISION TRAVEL SHOWS IN Q.14a) ASK** You mentioned "television travel shows" as a source of inspiration, which television travel shows in particular were a source of inspiration?

Q.14d **(IF OTHER TELEVISION SHOWS IN Q.14a) ASK** You mentioned "other television shows" as a source of inspiration, which television shows in particular were a source of inspiration?

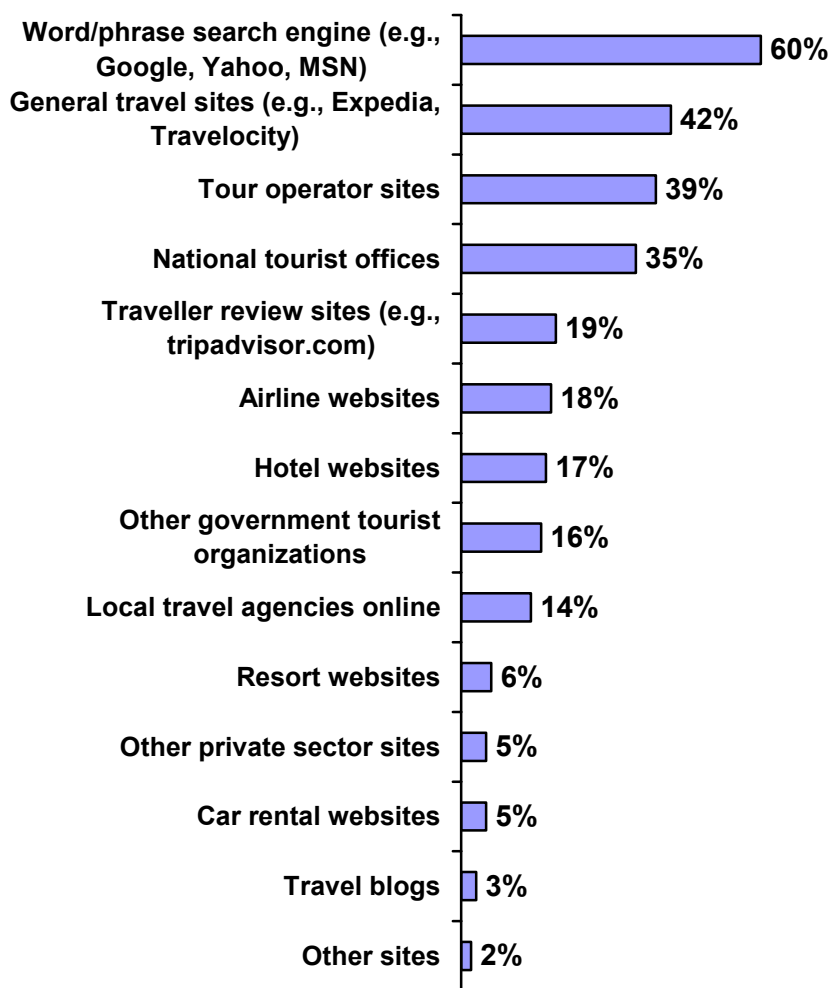
11.6 Specific Websites Used for Trip Decision

Popular word search sites are the main gateways to travel information (to 60%), followed by general travel sites (42%).

Tour operator sites and National Tourist offices rank 3rd and 4th.

EXHIBIT SECTION 1 1-6: SPECIFIC WEBSITES USED

Percent Among Travellers Using Internet



Source: Quantitative Survey Q.14e¹

¹ Base=n=406

Q.14e (IF INTERNET IN Q. 14a) ASK) You mentioned that you use the Internet as a source of inspiration. Did you use any of the following sites?

Section 12: Trip Planning

12.1 Trip Planning/Booking Leadtime

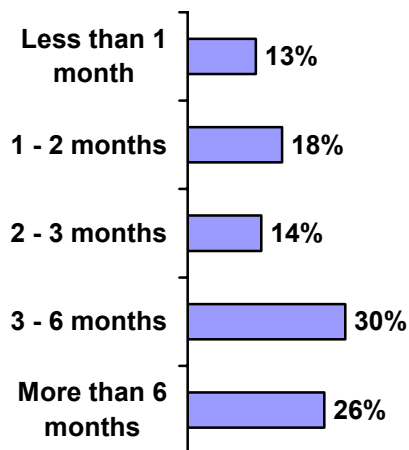
The French plan their trips 7 months in advance, booking them 3 ½ months in advance.

This is a fairly typical pattern for other countries.

EXHIBIT SECTION 12-1: TRIP PLANNING/BOOKING LEADTIME — BY ALL DESTINATIONS

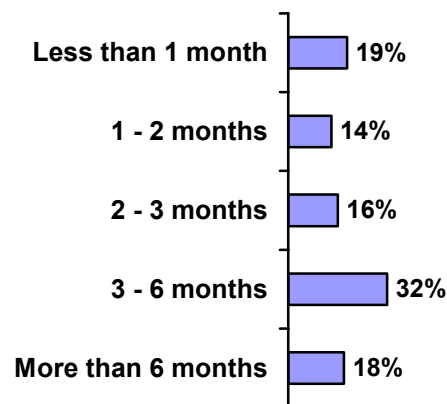
Percent Among Past 3 Years Travellers

Planning Leadtime



Average # of weeks 29.3

Booking Leadtime



Average # of weeks 13.6

Source: Quantitative Survey: Q. 15a,b¹

¹ Base=n=1,749

Q.15a How long before your trip did you definitely decide to go on that trip to
(**DESTINATION IN Q.8a**)?

Q.15b And how long before your trip did you actually book it?



12.2 Trip Planning/Booking Leadtime – by Destination

Planning and booking lead times are longer than average for Canada—40.6 weeks for planning, 17.2 weeks lead time for booking.

EXHIBIT SECTION 12-2: TRIP PLANNING/BOOKING LEADTIME — BY DESTINATION

	Percent Among Travellers Visiting Each			
	Asia (324) %	Caribbean (216) %	U.S. (277) %	Canada (719) %
<u>Planning Leadtime</u>				
Less than 1 month	13	17	8	8
1 – 2 months	17	15	13	14
2 – 3 months	14	17	17	14
3 – 6 months	31	31	34	33
More than 6 months	25	20	29	31
<u>Average # of Weeks</u>	32.0	23.4	32.9	40.6
<u>Booking leadtime</u>				
Less than 1 month	20	24	13	15
1 – 2 months	14	11	14	13
2 – 3 months	17	11	20	16
3 – 6 months	34	38	36	33
More than 6 months	16	16	17	23
<u>Average # of Weeks</u>	13.5	13.0	15.2	17.2

Source: Quantitative Survey Q.15a,b

Q.15a How long before your trip did you definitely decide to go on that trip to
(DESTINATION IN Q.8a)?

Q.15b And how long before your trip did you actually book it?

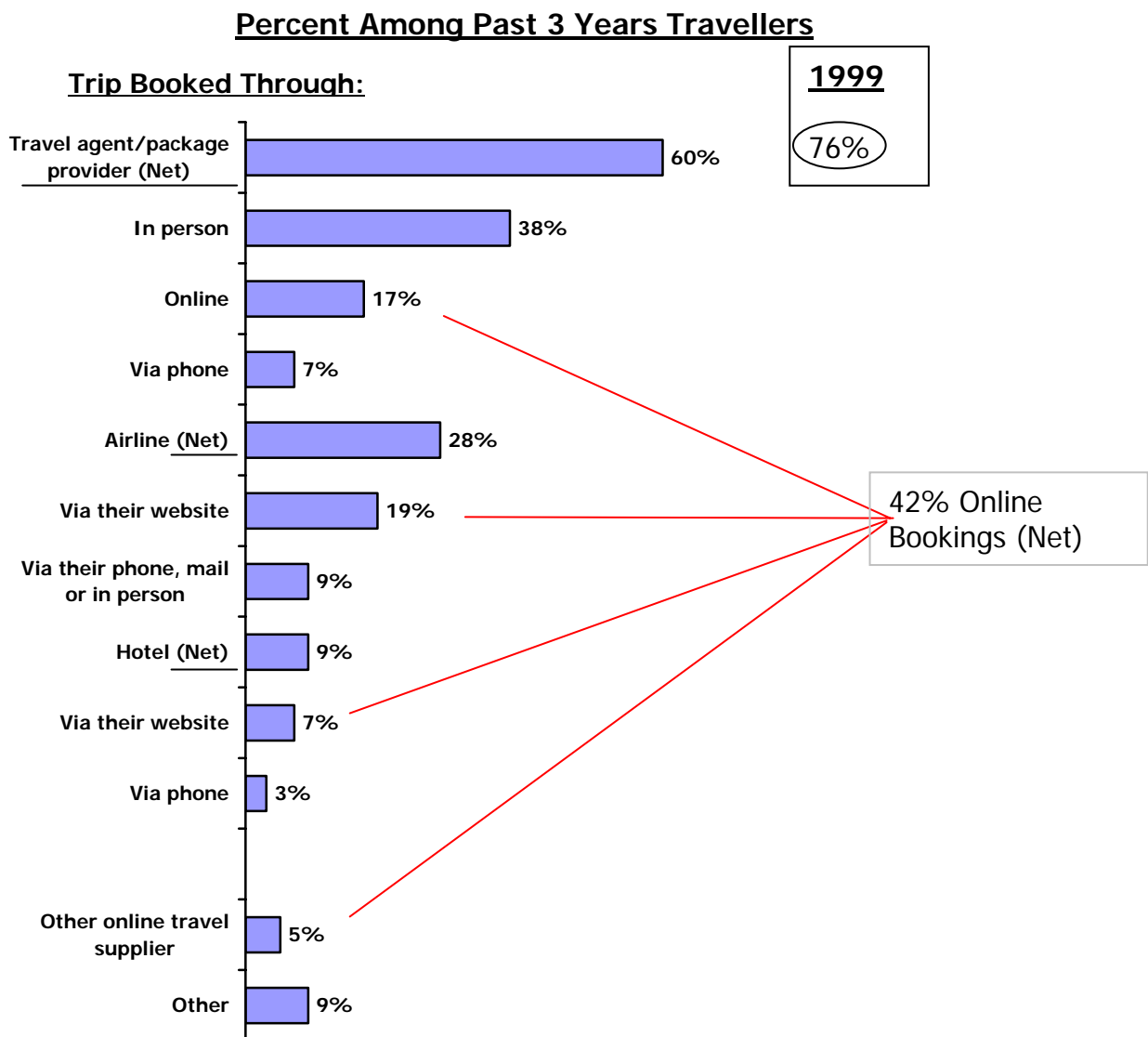


12.3 How Trip Was Booked

Only 60% of the French book long-haul trips through agents, down from 76% in 1999.

As many as 42% of sales are made online—17% online with an agent, the remainder direct--mainly with airlines (28%) and with hotel facilities (9%).

EXHIBIT SECTION 12-3: HOW TRIP WAS BOOKED — BY ALL DESTINATIONS



Source: Quantitative Survey Q.15c¹

¹ Base=n=1,749

Q.15c How did you book that trip?



12.4 How Trip Was Booked – by Destination

With travel to Canada, only half (53%) booked through an agent (down from 73% in 1999), an equal number direct--via an airline (38%) or direct to an hotel (11%). This pattern is similar to the US.

EXHIBIT SECTION 12-4: HOW TRIP WAS BOOKED – BY DESTINATION

	<u>Percent Among Travellers Visiting Each</u>			
	<u>Asia</u> (324) %	<u>Caribbean</u> (216) %	<u>U.S.</u> (277) %	<u>Canada</u> (719) %
<u>Trip Booked Through:</u>				
<u>Travel agent/package provider (net)</u>	<u>59</u>	<u>69</u>	<u>51</u>	<u>53</u>
In person	36	38	36	36
Online	20	24	12	13
Via phone	7	9	4	5
<u>Airline (net)</u>	<u>29</u>	<u>24</u>	<u>39</u>	<u>38</u>
Via their website	21	15	31	28
Via phone, email or in person	9	9	9	11
<u>Hotel (net)</u>	<u>10</u>	<u>7</u>	<u>13</u>	<u>11</u>
Via their website	7	4	11	10
Via phone	4	3	2	2
Other online travel supplier	4	5	8	5
Other	10	5	4	10
<u>Online Bookings (net)</u>	<u>46</u>	<u>45</u>	<u>52</u>	<u>47</u>

**Canada
1999
73%**

Source: Quantitative Survey Q.15c

Q.15c How did you book that trip?

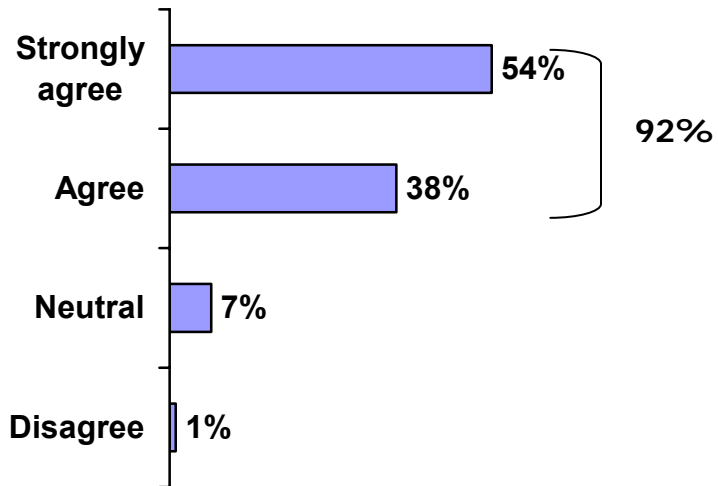


Section 13: Environmentally Responsible Destination

13.1 Long-Haul Traveller's Environmental Involvement

The vast majority of French travellers claim to try to reduce the impact they have on the environment on a daily basis (92%).

EXHIBIT SECTION 13-1: LONG-HAUL TRAVELLER'S ENVIRONMENTAL INVOLVEMENT



Source: Quantitative Survey Q.27a¹

¹ Base=Past/future travellers n=2,544

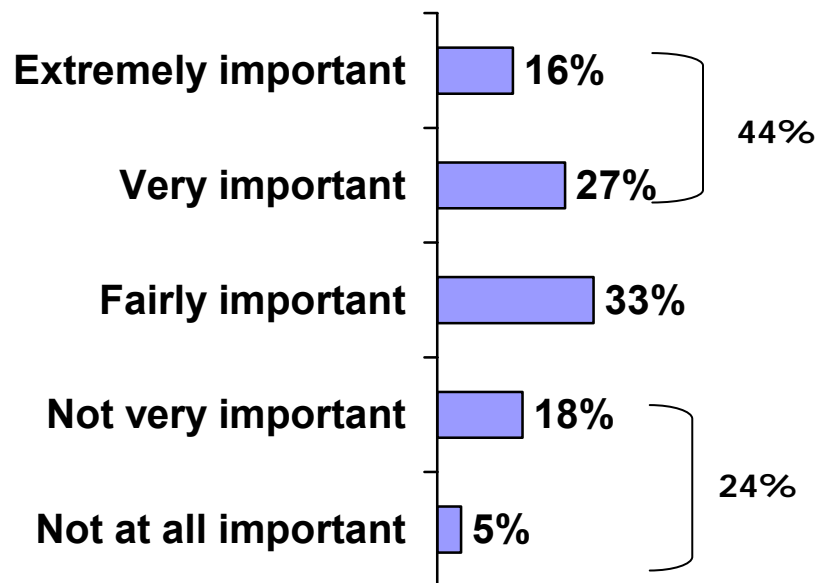
Q.27a To what extent do you agree or disagree with the following statement?

It is very important to me that I take action on a daily basis to reduce my impact on the environment by adopting environmentally-friendly measures such as recycling, conserving water.

13.2 Importance of Destination's Record on Environment

However, while most make a personal effort to reduce their impact, only 44% claim that their concern is enough to influence their choice of destination based on its environmental record.

EXHIBIT SECTION 13-2: IMPORTANCE OF DESTINATION'S RECORD ON ENVIRONMENT WHEN CHOOSING TRAVEL DESTINATION



Source: Quantitative Survey Q.27b¹

¹ Base=Past/future traveller n=2,544

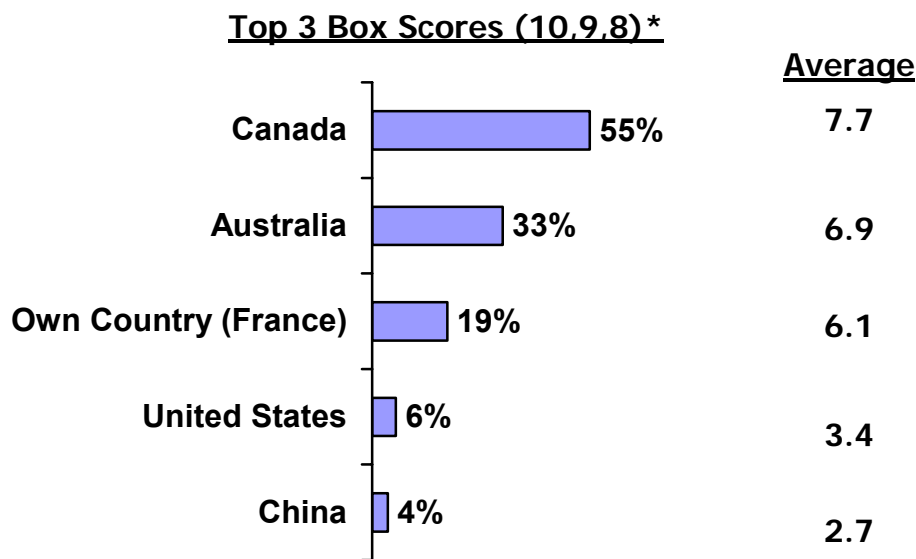
Q. 27b Thinking about the environment, some countries are making considerable effort to be more environmentally responsible, while other countries are much slower to react. When choosing a travel destination, how important to you is a destination's record on the treatment of its environment?

13.3 Destination Rating on Being Environmentally Responsible

The French believe that their own nation has a fairly poor record in terms of environmental responsibility.

Among 4 offshore countries evaluated, Canada clearly emerges as having the best reputation, ahead of Australia, with China and the US trailing badly.

EXHIBIT SECTION 13-3: DESTINATION RATING ON BEING ENVIRONMENTALLY RESPONSIBLE



Source: Quantitative Survey Q. 27c¹

¹ Base=Past/future travellers n=2,544

27c How would you rate the following countries as an environmentally responsible destination? Using a scale of 1 to 10 where “10” means extremely good and “1” means extremely poor, or any number in between.

*Rating on a 10 pt. scale. 10 means extremely good and 1 means extremely poor.

Section 14: Consumer Product Idea Forums

14.1 Introduction

This document is a report on a qualitative study conducted online amongst tourists from France who fell into two different categories:

- Those who have visited Canada before, in the recent past
- Those who declared a strong interest in visiting Canada in the near future

The principal objectives of this study were to formulate hypotheses bearing on the following issues:-

- Hope and expectations of tourists coming over to Canada from France
- What they appreciate the most, in reality and in prospect
- How best to attract them towards parts of Canada outside Quebec
- The sights, places, activities that have the greatest magnetism for them
- What kinds of specific itinerary might be developed to appeal to them

Each region addressed in the forums was addressed in a separate section, revealed day by day to the participants. The forum started with an overview of Canada as a destination, providing a holistic picture of travel to Canada from France.

14.2 Canada as a Destination: General Observations

Canada rates highly as a “dream” destination, poorly as a planned destination, and rarely as an extended “city visit” destination. The primary conversion method for the French tourists has been visiting friends and relatives (VFR) and/or strong recommendations by friends.

The key, for Canada, is shifting it from a “dream” destination to a reality destination. While the current major conversion factor is VFR, the introduction of “cheap” fares to Canada, and the increased frequency of flights and increase in Canadian destinations brought around when the new Open Skies agreement is signed should help.

Certain specific destinations in Canada are iconic for the French

- Quebec
 - Montreal
 - Quebec City
 - Rural Quebec
- Niagara Falls
- Toronto

General knowledge of Canada, even amongst previous visitors, is poor – especially in terms of the size of the country.

14.3 French Stereotype Perceptions of Canada

In the forums, French tourists who have been to Canada mainly talked about Quebec. They had occasionally been further afield: this meant, for the most part, going as far as Ottawa or alternatively Toronto and Niagara Falls.

This focus on Quebec stems from the following:

- Having friends and/or relatives who live in Quebec; sometimes it is just having friends/relatives who have been there and reported nice things about it
- Knowing Quebec as a mainly francophone province, which means:
 - feeling comfortable about asking questions, interacting with local people
 - curiosity about the old French colony, its people and its history
- Also perceiving Quebec as offering some great holiday experiences of the kind they appreciate and that they link with "Canada" in their perception: on the one hand, exploration of wide open spaces and nature in the raw, on the other large cosmopolitan cities like Montreal and Quebec City with modern comforts, food and entertainment

Note also that having friends and relatives situated in Quebec implies these things as well:

- Some cost savings (staying with, being entertained by these people)
- Perpetuation of the "Quebec = Canada" principle because of these people's influence on where to go, what to see, etc., which intensifies the Quebec experience at the expense of going further into Canada.

French tourists who have not been to Canada seem to have fewer direct links (i.e. fewer friends and relatives) in Quebec. But they also assume to a large extent that Quebec is the place to go. They have heard about Quebec history; they have met Quebecers in France and elsewhere, find them sympathetic and regard their manners and their accent as "charming". A few also mention Quebecois singers who have made a hit in Paris. These factors tend to increase their primary focus onto Quebec.

14.3 French Stereotype Perceptions of Canada

At the same time these tourists seem more open than the previous visitors. Perhaps because of having fewer close ties, they are ready to become enthusiastic about Canada as a whole – as soon as they are shown glimpses of what is available by way of scenery and activities across the land.

They know about Niagara Falls and at least some about the West Coast. They demonstrate rather more of a "Canada is part of North America" perspective.

Despite concerns about language and miscalculating distances, they seem to represent a considerable opportunity for tourist agencies to develop for the benefit of the whole country.

14.4 Experiences of Canada

The following accounts of visits to Canada are fairly typical. They show the personal connection (local relative in Montreal) and the kind of things that these previous visitors to Canada enjoyed doing:

- i) Went to Montreal at Easter, to stay with sister
Hired a car big enough for the whole family
Visited Quebec, Niagara Falls and Toronto
Wanted to go further north to watch whales but were prevented by a snow storm
Overall – enjoyed "Canada" a lot:
 - For its wide open spaces
 - For the relaxed, friendly hospitality of the people
 - Because all seasons are lovely
- ii) This was a trip devoted to discovering flora and fauna
Lots of walking tours
Appreciated:
 - being close to nature
 - not being shut up in cars all day
 - caribou, whales, lots of birds
 - side visits to Montreal and Quebec City

When it came to enjoying nature some were more adventurous than others. For example,

- taking a kayak out to watch whales vs. taking a boat trip
- Skiing, skating, snowshoeing etc. as opposed to watching it all through a cottage window

14.5 General Discussion of Tourism Products

Planning tours and itineraries for the French tourist who is mainly Quebec-bound should probably allow for different levels of adventurousness: some of these people want to be more active, others less so. But all want to experience the intensity of the season (summer or winter); all want to feel they are getting closer to "nature", seeing creatures and vistas they would scarcely see in Europe.

One idea that would stem directly from this is the principle of offering a few days by a lake, in a cottage – preferably a log cabin with a fireplace. This could be summer or winter (preferably avoiding bug season). Those who are more soft adventure focused could skate or ski; others could snowshoe or simply watch. Everyone would probably want a ride on a dogsled. This is the kind of magical experience that delighted the French tourists who had been here:-

"The "must-do" in winter is a week-end cottage! You go off for three days to a lakeside cottage. The lake is frozen over. On the program: trip across the lake, cross-country skiing, huge meals and chatting by the fireside... Happiness!"

Within Quebec itself there was a lot of interest in going beyond just Montreal and Quebec City. For example:

- To the Gaspé (for fishing, scenery, climbing, Percé rock, Bonaventure Island, bird-watching)
- To Lac-St-Jean (passing by Tadoussac for whale-watching opportunities, a nature park, etc.)
- To the Laurentians , in particular to Mont Tremblant

Some particular experiences were well appreciated:

- Encounters with wild animals (raccoons, deer)
- Visiting a "cabane à sucre", joining in the singing and admiring the dancing
- Spa's which provide some outdoor contrasts in temperature
- The ice hotel, ice sculptures

14.5 General Discussion of Tourism Products

There were complimentary remarks about Montreal and Quebec City. But throughout there was greater emphasis on the huge expanses of natural beauty that Quebec offered. But it seems significant that particular aspects of each city that caught tourists' imagination were also linked closely to nature, e.g.:

- The Biodome in Montreal; the lookout on Mount Royal; the Botanical Gardens
- The terrace of the Château Frontenac where you can admire the curve of the St Lawrence while sipping a beer

The general implication here is that the major cities should be regarded as gateways or bases, not as ends in themselves.

Side-trips outside Quebec were mainly towards Niagara Falls, which is so famous it is hard to come to Canada without making time to get there at least once. Toronto is a convenient stopover on the way there or back: but the CN Tower had delighted more than one visitor. Ottawa was more like a day trip from Montreal. One respondent mentioned getting as far as Vancouver Island as part of an extended visit: in line with the importance of nature in Canada, the high point for her was a visit to Butchart Gardens.

One of the odd findings among both past and intending tourists to Quebec is that they knew little and did not seem to care much about Atlantic Canada. (This may be a by-product of having a small sample, but it seems important to note as a possibility.) While claiming to be "interested" in French influence in Quebec as part of North America, there was little sign of respondents applying the same curiosity to Acadian villages or to Louisburg. It may be that the French aspect of Quebec is here and now, whereas the Acadian side of Atlantic Canada is too much in the past.

In terms of itineraries then, extensions from Quebec might be more appealing to the West than to the East. To maximize appeal for French tourists the East-of-Quebec should probably be promoted in terms that correspond to feelings expressed when respondents actually looked at Atlantic Canada websites and were struck by:

- Nature and related activities as opposed to:-
- Pursuing French heritage



14.5 General Discussion of Tourism Products

That is to say, they were impressed by Gros Morne and by the Cabot Trail – for example:

"Taking the Cabot Trail which displays the most attractive maritime track in the world, featuring forests, lakes, cliffs plunging into the sea: in the distance, whales, in the sky bald eagles."

The same respondent went on to say that:

"Sure it would be interesting to visit the historic sites where Canada was colonized by the French but going there just for that would not be the most important item for me."

Wonderful scenery and the beauties of nature did it for him.

This is perhaps, then, the kind of introduction that an itinerary branching out from Quebec might take.

Quebec → East - (2 weeks or 3)

Arrive at Montreal: options for guided tours or independent visits (4-6 days)

Guided would include:

- Biodome and Botanical Gardens
- Mont Royal
- Old Montreal, Pointe-à-Callières
- Day-trip to Mont Tremblant – or Magog/Mont Orford
- Chalet experience

Transfer to Gaspé (2-4 days)

- Percé Rock, Bonaventure
- Mont Albert

Transfer to Sydney NS for Cabot Trail tour (2-4 days)

Return via Quebec City to Montreal

(A longer visit control involves an extension to Bay of Fundy (whale watching) and/or Gros Morne Park)



14.5 General Discussion of Tourism Products

Quebec → West - (2 weeks or 3)

Arrive at Montreal: (first section as Quebec → East)

Transfer to Ottawa/Hull (3-4 days)

- River Rouge (rafting) en route
- Museums
- Gatineau Park

Transfer to Toronto (3-4 days)

- CN Tower

Options:

- excursion to Grande River
- Niagara-on-the-Lake
- Toronto Islands, sailing
- Bruce Trail, hiking

Transfer to Niagara Falls (2 days)

Options for "more than just looking at it"

- Helicopter, Maid of the Mist, balloon, etc.

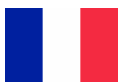
Return via boat through 1000 islands

Back to Montreal

(A longer visit could involve an extension to Collingwood, Georgian Bay; bird-watching at Point Pelee)

In each of the above suggestions, the driving consideration is to build on:

- What French tourists have told us they like (and have liked in Quebec)
- What they associate with Canada
- While drawing them towards a broader view of Canada than just Quebec
- Providing options, particularly
 - more active vs. less active
 - guided, organized vs. free-wheeling, independent



14.5 General Discussion of Tourism Products

Each of them could work in summer or winter. The nature of the activities on offer (e.g. skating on the lake or swimming in it) obviously changes.

14.6 Barriers and Options

In the French forums, a subtle barrier appeared: Quebec.

Quebec: The “ideal” ex-colony

In the French forums, the key barrier was also the key draw – a sense of ties to Quebec heritage. This had the notable effect of limiting the perceptions of Canada to Quebec with a few, non-Quebec, iconic sites (e.g. Niagara Falls). While earlier suggestions about itineraries to other Francophone areas have a lot of merit, it is important to recognize **why** Quebec is such a draw for the French traveler. It is not only the language (which is closer to the dialects of Normandy or Brittany) or the “culture” (which is “quaint”), it is also the fact that Quebec is the only French ex-colony which is predominantly white, that has retained strong ties to France and that is a window into the past of France’s “glory years”.¹

Options

The suggested itineraries (listed above) use the attraction of Quebec as the “base point”. A similar strategy can be adopted with regards to the development of other parts of the country, but with the tie into Francophone exploration and “heroes”. For example, Louis Riel can be used as the iconic “hero” to open up tours of Manitoba and the Prairies, and the role of the Voyageurs can be used for parts of BC and the Territories.

¹ France’s relations with its ex-colonies are often strained by how those colonies gained independence. Consider the cases of Vietnam and Algeria, both involving bitter insurgency wars, compared with that of Quebec which was “conquered” before the French Revolution.



14.7 British Columbia

Outside Quebec, British Columbia is one of the best known destinations in Canada.

Despite this, general knowledge of BC is quite limited even amongst respondents who had previously travelled there.

It was very clear that even French tourists who had never given much thought to BC in the past were very impressed by what they saw on websites and what they heard about this part of Canada from others.

Vancouver formed a strong part of this attraction. But not just as a city: it was the position of the city, between the water and the mountains, with Stanley Park on one side, that seemed to capture the imagination. There was curiosity about Chinatown, Gastown and the contrast offered by a modern city in the midst of wild and varied scenery. But the focal point of interest was more often something like this:

"Above all I imagine myself enjoying a trip that is basically concerned with sea activities: short cruises; meeting whales; beaches and diving."
(FR1 – Previous visitor to Canada)

One of the obstacles to taking seriously a vacation in Western Canada was distance. It seemed a very long-haul, that would eat away a large chunk of available holiday time. There was also relatively more uncertainty among French tourists about distances between places worth seeing in BC, whereas they could picture the geography of the more travelled parts of Quebec fairly clearly. Not wanting to spend a lot of time in places and buses or even in hired cars, they sometimes urged tour operators to supply more details of how much inter-site travel time was required, for each day when there was an "organized" component. This was a particular concern among:

- The more active, adventurous and sports-oriented people
- Those who would be travelling with children

14.7 British Columbia

Following are a list of things to see and do that particularly appealed in BC:

<p>Sports activities</p> <ul style="list-style-type: none"> ➤ Walking tours ("real" trails, "not roads") ➤ Canoeing ➤ Skiing ➤ Snowmobiles ➤ Cycling ➤ Horseback riding <p>Animal watching</p> <ul style="list-style-type: none"> ➤ Birds ➤ Orcas; other whales ➤ Bears ➤ Coyotes ➤ Moose ➤ Wapiti; elk; caribou <p>Vancouver City</p> <ul style="list-style-type: none"> ➤ The old quarters ➤ Stanley Park ➤ Beaches ➤ Museums, galleries ➤ Grouse Mountain; Whistler ➤ Capilano Bridge ➤ Van Dusen Gardens 	<p>Exploring, admiring scenery</p> <ul style="list-style-type: none"> ➤ Vancouver Island ➤ Caribou Chilcotin ➤ Powell River ➤ Fjords ➤ Juan De Fuca Strait ➤ Mount Revelstoke ➤ Garibaldi Park <p>Miscellaneous</p> <ul style="list-style-type: none"> ➤ Rodeos ➤ Butchart Gardens ➤ Train ride through the Rockies <p>Other Cities</p> <ul style="list-style-type: none"> ➤ Victoria ➤ Nanaimo (artists' colony)
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In many ways, what French tourists expected from BC was an extension of what they knew or imagined in Quebec: wide open spaces, the feeling of being free to roam (versus European constraints), seeing animals in their natural habitat, getting closer to nature and enjoying being active, with varying degrees of adventure.

14.7 British Columbia

When it came to suggesting itineraries, several combined BC and Alberta. There were wonderful things they had never thought about in Alberta too (Banff, Jasper, Lake Louise). Being adjacent, it seemed to make sense to visit both in one vacation.

The distances and time spent on the road were a concern: some clearly wanted good advice about this. Especially if they wanted to swim, ski or cycle, or go for a pony ride – they wondered what they could fit in, and how.

Uncertainty about:

- Adequate communication in a foreign language, and
- Would the locals be as welcoming to visitors as the Québécois

These increased their concern about not taking on too arduous or too rushed a schedule.

14.7 British Columbia

The more active French tourists, particularly those with limited vacation time, would probably be well advised to concentrate on just one province or the other. The two itineraries suggested below are on different time frames.

I BC (2 weeks)	II BC and Alberta (3 weeks)
<p>Arrive Vancouver Explore city (3-4 days) Choice of guided vs. independent) Included:-</p> <ul style="list-style-type: none"> ➤ Stanley Park tour ➤ Grouse Mountain ➤ Harbour tour ➤ Van Dusen ➤ Museums ➤ Tourist districts: Gastown, Chinatown, Granville Island <p>Transfer to Vancouver Island (3-4 days) Options:</p> <ul style="list-style-type: none"> ➤ Whale watching ➤ Cycle tour ➤ Nanaimo ➤ Butchart Gardens <p>Transfer back¹ to Vancouver (brief stop) Up the coast to Powell River (3-4 days)</p> <ul style="list-style-type: none"> ➤ Exploration ➤ Cycle/walking tour ➤ Rafting (?) <p>Back to Vancouver → Paris</p>	<p>Arrive Calgary (3-4 days) Visit Amerindian Museum and rodeo^{2**}</p> <p>Visit Banff, Lake Louise, funicular, walking tour Transfer to Vancouver (via train with observation car?) (Continue as per I)</p>

¹ Preferably – different mode, different route (e.g. ferry one-way, seaplane the other)

² Possibly a working ranch; horseback riding option; rodeo skills demonstrations



14.8 Alberta

Respondents sometimes combined a few days in Alberta with a longer stay in BC. (See previous section). Yet the kinds of things they expected to see and do in Alberta made it clear that a longer stay in this province could definitely be attractive. As with any part of English Canada, it goes without saying that even a longer stay in Alberta might well be preceded or followed by a stopover of a few days in Quebec.

For these French tourists, "Alberta" does not mean much. What is much more impressive is The Rockies. This grips their imagination. The Rockies, the wild life associated with them and the activities that could be practiced there add up to a formidable package. This is a kind of extreme extension of what they already know about or have in their minds in Quebec. Here all the wide open spaces and the opportunity to do and see things in the wilderness, just as in Quebec, but on a grander scale, with majestic, unexpected scenery.

Focussing on the Rockies, or on "the West" as a general area leads to a blurring of the boundary between BC and Alberta or even regarding it as irrelevant.

Note that although Banff and Jasper tended to dominate the positive responses to the websites that they visited, the French were also very impressed by the tourist opportunities around Drumheller. These came as a surprise as well as something unique to Canada and possibly the world.

14.8 Alberta

Below are the places, points of interest and activities that incited the respondents to want to visit Alberta:

Places	Attractions	Routes towards→
Calgary	Olympic Sites	Starting/finishing point for visiting Banff; or for The Badlands
Edmonton	West Edmonton Mall	Lac La Biche Sir. W. Ch. National Park Ellen Island National Park Athabasca Glacier
Banff	Hot Springs Funicular Sports, walking tours Lake Louise	
Jasper	National Park Mount Robson Maligne Lake	Valemount (BC) Rail connection → Rockies → Vancouver
Drumheller	Prehistoric sites Museums	

14.8 Alberta

There were a number of more adventurous activities mentioned by soft adventure seeking tourists:

- Helicopter rides over the Rockies and the glaciers
- Heli-skiing
- Skiing (alpine and cross-country)
- Rafting
- Kayaking
- Snowmobiles
- 4 X 4
- Horseback riding

At a less adventurous level, they wanted to be able to walk around and see hoodoos, scenery, wildlife; boat trip on lakes. The Calgary Stampede was not often mentioned: but judging from responses to BC and Quebec, horse shows, rodeos and possibly tracking could have considerable appeal. The chance of seeing the Aurora Borealis was an added attraction.

Itineraries

- a) A popular itinerary which would allow for a few days in Jasper (presumably via Edmonton airport) for:
Walking tours
Summer options: horseback tour; 4X4 tour
Winter options: ski-ing; snowshoeing; dogsled
Helicopter tour of glaciers, Mount Robson

B and B alternatives ("to meet real people") should be offered alongside a hotel.

Then the tourists would go by train to Vancouver.

- b) A holiday based in Alberta would be for 2 to 3 weeks. There would be a different pattern depending on the season:



14.8 Alberta

Winter	Summer
<p>Arrive Calgary (2-3 days)</p> <ul style="list-style-type: none"> ➤ Amerindian Museum and Olympic sites <p>Transfer to Banff (5-6 days)</p> <ul style="list-style-type: none"> ➤ Walking tours/snowshoe ➤ Winter sports options ➤ Lake Louise ➤ Hot Springs, funicular ➤ Helicopter tour <p>Transfer to Jasper (5-6 days)</p> <ul style="list-style-type: none"> ➤ Touring as in a) (above) with winter options <p>Transfer to Edmonton (2-3 days)</p> <ul style="list-style-type: none"> ➤ West Edmonton Mall and return 	<p>Arrive Calgary (2-3 days)</p> <ul style="list-style-type: none"> ➤ Amerindian Museum ➤ Stampede (or smaller-scale rodeo/horse farm experience) <p>Transfer to Drumheller (3-4 days)</p> <ul style="list-style-type: none"> ➤ Prehistoric sites field trip ➤ Prehistoric museum <p>Transfer to Red Deer (1-2 days)</p> <ul style="list-style-type: none"> ➤ Visit Aspen Beach prov. park <p>Transfer to Edmonton (3 days)</p> <ul style="list-style-type: none"> ➤ Visit West Edmonton Mall ➤ Strathcona <p>Transfer to Lac La Biche (3-4 days)</p> <ul style="list-style-type: none"> ➤ Walking, cruising ➤ Sports activity options <p>Transfer to Jasper (via Edmonton) (overnight) (3-4 days)</p> <ul style="list-style-type: none"> ➤ Touring as in a) (above) with summer option <p>Return via Edmonton</p>

14.9 Ontario

For the French tourists, certain places tended to dominate their thoughts about what to visit in Ontario. When first considering the question of where to go and what to see there, they concentrated on:

- Niagara Falls
- Toronto
- Ottawa

These they had all been heard about before. Some previous visitors to Canada had made side trips to one or other of the three, when visiting (primarily) Quebec. Niagara Falls is perhaps the single most majestic item associated with North America – that and perhaps the Grand Canyon. It has "must see" status. One respondent remembered seeing a movie with Marilyn Monroe at Niagara Falls, when she was very small: the site had magic for her ever since. It was also somewhere that merited a second visit.

As they toured the websites and found out more, some other themes came up strongly. In particular:

Algonquin Park	Imagined as the park that "has everything": forest trails, canoeing, swimming, camping, barbecues, great scenery and animals
Fall colour journey	The colours made a strong impression on the sites
Lake-to-lake	The concept of a progression by water, including rivers and canals, stopping to admire scenery and animals

For Toronto, the main focus was the CN Tower; plus the chance of a boat cruise, shopping at the Eaton Centre, etc., and getting a multicultural experience (e.g. tour of ethnic districts and museums).

14.9 Ontario

For Ottawa, there was curiosity about the Houses of Parliament and the National Arts Centre, which both seemed worth a visit. This also appealed as a confluence town where three rivers met: the views from the water and along the Rideau Canal made a good impression.

Again, there were divisions between the sports/adventure respondents and those who wanted to see a lot but at a more relaxed pace.

Where Niagara Falls is concerned, note that some just want to watch in awe. Others want to see the Falls in a superior way to the huge crowds of other tourists: they want a helicopter tour, followed by the Maid of the Mist journey and perhaps the Scenic Tunnel to give a sense of total immersion and not missing anything.

A panoramic restaurant appealed here too.

Itineraries

Some French tourists see Ontario essentially as an "add-on" to a trip to Quebec. However, there was more and more interest in taking a longer vacation in Ontario as respondents learnt about it more, and viewed the websites.

Unlike Quebec, they got the impression that Ontario is at its most appealing in summer and fall (not winter).

a) Short add-ons:-

- Montreal → Ottawa → Niagara Falls → return to Montreal (within a week)
- Montreal → Niagara Falls → Toronto → return to Montreal (within a week)

The activities would be as suggested above. Note that Niagara Falls is virtually unavoidable since it is the primary reason for venturing outside of Quebec.

14.9 Ontario

- b) Longer trips-
- i) One possibility would be a sports/adventure-oriented vacation, starting in Ottawa.
- Arrive Ottawa (4 days)
- House of Parliament
 - Museums (esp. Civilisation)
 - Gatineau Park
 - National Arts Centre (with a French show, perhaps)
 - Short tours: canal and confluence of rivers
 - Shopping
- Transfer to Grand Calumet Island (3 days)
- Options: rafting, canoeing, kayaking, choice of camping/cottages, barbecues
- Transfer to Algonquin Park (4 days)
- Options: walking, cycling, canoeing, observation of wild life, choice of camping/cottages, barbecues
- (At some point: passing by an Indian village)
- Transfer to Parry Sound (4 days)
- Options: longer boat cruise, sailing, kayaking, canoeing, barbecues or Muskoka restaurants
- Transfer to Toronto (4-5 days)
- CN Tower
 - Quick trip to Niagara Falls and back
 - Shopping: Eaton Centre, etc.
 - Day on the Island
- Options: sailing, swimming, war canoes
- Return



14.9 Ontario

ii) An alternative would start and end the same way
(Ottawa – 4 days... Toronto – 6 to 7 days)

In between, the tourists would:-

Transfer to Algonquin Park (4 days)

- For a more leisurely stay, involving guided walking tours, some boat trips, lots of animal/bird watching, staying in Inns/B&B's

Transfer to Muskoka (3-4 days)

- Choice of an inn for some lakeside water sports, gastronomy, good scenery, walking tours nearby

Transfer to Toronto (6-7 days)

- With a longer trip to Niagara Falls returning via the wine country, Niagara-on-the-Lake

Return

iii) There is probably also a good case to be made for a 3-week vacation starting from Montreal and pursuing a water route through:

- 1000 Islands

- Toronto (+ Islands)

Transfer by road to:

- Collingwood, (then mainly by water)

- Georgian Bay

- Manitoulin Island

- The Soo (Sault St. Marie; side trip to The Shoals Provincial Park)

- Cape Gargantua

- And back (via Tobermory, for different views)

→ Toronto

and return

(For this, there would be spaced landing points for exploring the lakeside hinterland, wild life, etc.)

14.10 The Atlantic Provinces

It proved harder to develop enthusiasm for a trip to the Atlantic Provinces, than to open up French tourists' minds to the possibilities of going to Ontario or the West. This may come down to their being nothing that they can instantly recognize in the Atlantic Provinces as being on a par with a "must-see" item like Niagara Falls or the Rockies.

Several comments were made that there is little expectation of "dépaysement" of the kind they would be hoping for when spending a lot of money and time on a trip to Canada. This means not being convinced that the Atlantic Provinces really warrant a journey on this scale, since they would not make them feel they were experiencing something totally different from a local trip – to Brittany, for example. Even the name "Nova Scotia" implied for one respondent "like going to Scotland", which could be accomplished easily on a long week-end.

Another point to be made here is that there was little evidence of serious interest in exploring French history and influence outside Quebec. People were polite about the idea – e.g. "Yes certainly, the Acadian villages" – but there was little obvious magnetism. This aspect should probably not be ignored, but it only deserves secondary status.

Nevertheless, some of the respondents were impressed by what they saw on websites. In particular, the views of the Cabot Trail, of Gros Morne, of the Newfoundland coast in general, and of the promise of the Aurora Borealis in Labrador – all this was new information for them, on a spectacular scale. It added up to something worth making out a special itinerary for.

There was also the allure of the sports opportunities. One of them felt motivated to cycle right around Nova Scotia, including the Cabot Trail. In a less adventurous way, others liked the idea of exploring the Atlantic Provinces by ferry, offering a variety of seascapes and places to explore after landfall.

These tourists were struck by the fact that the Atlantic Provinces were surprisingly varied: it was not just the Breton or the Scottish coast, it showed a range of surprisingly different views. This unexpected variety was important.

The bird and animal life was also noteworthy as a magnet. As in other parts of Canada, seeing a range of exotic fauna in the wild proved to be a significant attraction.

14.10 The Atlantic Provinces

Even more than in the West, there was a tendency to want to cram too much into a short week. One of them felt like covering four provinces (including Newfoundland and Labrador) in eight days.

Itineraries

i) As an add-on to a trip to Quebec (7-8 days)

Arrive Halifax (2 days)

- Harbour tour (Bluenose?)
- Shopping (Historic Properties)
- Citadel

Transfer to Lunenburg via Peggy's Cove (1 day)

- Fisheries Museum

- Walk-around

Transfer to Digby (2 days)

- Whale watching expedition
- Transfer to Cape Breton (2 days)

- Cabot Trail experience (walking)

Return

ii) As an add-on: sports-orientated (7-8 days)

Arrive – Halifax (1 day)

Transfer to Baddeck (1 day)

- Bell Museum

- Cycle tour of Cabot Trail

2 days to Ingonish Beach

1 day in Cape Breton Highlands National Park → Chéticamp

2 days back the East side to Inverness

Transfer to Halifax

14.10 The Atlantic Provinces

N.B. In both (i) and (ii) seafood and wild game would be offered frequently.
In (ii) the best sites for bird/animal observation would be visited

iii) Longer visit (2-3 weeks)

Arrive - Corner Brook/Deer Lake NFL

- 3 days excursions in Gros Morne National Park

Transfer - Happy Valley/Goose Bay*

- 2 days excursions – helicopter over glaciers

Transfer – St-John's NFL (2 days)

- Explore city, Signal Hill

- Tour of Avalon

Transfer – Îles de la Madeleine (2 days)

- Excursions

Transfer – Sydney NS (4 days)

- Cabot Trail experience (alternatives: walking tours, cycling, horseback riding)

Transfer – Halifax (2 days)

- Shopping

- Sightseeing

Transfer – Digby (2 days)

- Whale watching expedition

Return via Halifax (1 day)

* N.B.: If possible, timing should be geared towards optimum time to see Aurora Borealis and have reasonable weather.

14.11 Forum Summary

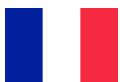
Canada has an historical connection with France that has both been beneficial and troublesome. This is probably the reason why we place so high in the “Dream” category, but poorly in the “actual” category.¹

One of the key findings of this research is the vast level of ignorance of the French respondents about Canada. In some cases, this plays to our advantage (e.g. “polite”, “caring”, “authentic”), but in some it doesn’t (e.g. “vast”, “Canada = Quebec”). This ignorance is especially important when we consider how to develop new products because, in most cases, they actually are unaware of **existing** products.

For our French respondents, our best tools for selling Canada are a) our links with France and the role of French colonists in building Canada, and b) the experience of Canada.

At the more pragmatic level, it is important to clearly identify tourism products that are “Francophone Friendly” outside of Quebec so that the perception of the rest of Canada as Anglophone (and hence “foreign”) is alleviated.

¹ It should also be noted that for at least several respondents, Canada was viewed as an excellent place to immigrate to as well as vacation in.



Section 15: The Travel Trade

15.1 French Travel Trade

1. Perceived Market Trends

a) Destination Trends

New "in" destinations:

- Dominican Republic, Mauritius, the Maldives, particularly due to the growth of airlines flying to these destinations, making prices more accessible.
- South America, including Brazil and Mexico, with more flights to other regions than Mexico City (Yucatan, Riviera Maya, etc.).
- Eastern Europe (Croatia, the Baltic countries, etc.) also due to the growth of low cost airlines offering very competitive flights.
- Destinations combining "wide open spaces" and sun like South Africa and Australia

Less visited destinations:

- The Middle Eastern countries, especially Egypt and Tunisia due to political instability that has received wide media coverage in recent years, as well as to deteriorating accommodations (hotels, tours, etc.) and to a globally cheap, "mass tourism" image
- The French overseas departments, especially Martinique and Guadeloupe, where the price of a stay is still very high compared to other competing destinations (Pacific islands) and which have an increasingly negative image in terms of hospitality and on-site services.

Certain trends are confirmed:

- Asia is on the rise, especially Thailand, Indonesia and Vietnam
- A slight recovery for the United States, after a significant drop last year, related to problems in obtaining biometric passports and to the geopolitical crisis that has arisen in recent years (war in Iraq, etc.), generating a degree of suspicion among French consumers.

15.1 French Travel Trade

As for Canada, the drop in demand for agencies is confirmed this year, despite the recovery for the US:

- An observation that professionals cannot explain spontaneously, except for the lack of communication for this destination, especially on the western part of the country.
- However, there were many full flights to Canada this year, particularly this summer: which would tend to indicate a trend towards independence on the part of travellers to Canada who no longer go through an agency to organize their trips.

b) Changing Needs

- Motivations for travel remain globally the same--in other words, discovering other cultures and sites, contact with locals, for a getaway, the need to break out of everyday environment, etc.
- However, there are expectations for more 'real' trips: more authenticity, simplicity, closeness to locals, with an emerging sensitivity to eco-tourism or green tourism, focused on virgin, intact, preserved wilderness.
- A increased need for safety, especially with 'risky' destinations.
- A niche expectation, but a growing one, is the luxury service offer, with very high-end hotels to counter an offer that is increasingly downscaled.
- Finally, new motivations are emerging but are still marginal, like trips revolving around the practice of a sport or specific themes (cultural trips, spa/wellness, adventure, etc.)

15.1 French Travel Trade

c) Planning/Booking Trends

- Major trends are confirmed with massive use of the Internet:
 - Primarily for flight purchases: travel agencies are being dispossessed of this business, due to ultra-competitive prices with which they cannot compete.

"Five years ago, I was selling 100 tickets to Canada a month, now I sell 0"
 - But, also for gathering information on a destination's available packages or attractions: usage of multiple sources of information - tour operators, official tourism sites, travel blogs, etc.
- Travellers with an increasing tendency to compose their trips alone, with no need for agency services for short distances, especially within the Euro Zone or when they are 'repeaters' who want to return to a familiar country.
- However, frequent use of travel agencies for long-haul destinations when:
 - the destination is unfamiliar,
 - the foreign language is unfamiliar, creating an obstacle to independence,
 - trip organization is more complex due to the size of the country and the necessity of optimizing the pleasantness/time spent factor,
 - fears over paying online, especially when the budget is consequential.
- Agencies are being forced to adapt to these changes, especially to the heavy competition from the Net, by developing the specialist angle in order to justify a real added value and a much higher price, either:
 - By proposing trips that are difficult to design unassisted,
 - By developing unusual new products that fit customers' new expectations

"in a few years, the only ones left will be the best ones in terms of the advice they give their customers"

15.1 French Travel Trade

- Still, customers are increasingly difficult to satisfy because:
 - They know in advance what they want to do in a country
"they have very specific ideas of what they want"
 - Their budget is usually too low for these demands, since it is based on often misleading 'leading prices' on the Net
"they want to pay less for more quality"
 - Expectations for quick, precise answers
- Consequently, agencies are increasingly addressing either mature or affluent clienteles.
- The agency clientele is increasingly disloyal and mixes easily:
 - Capable of buying a very upscale customized trip and then traveling on a mainstream package to a club hotel via the Internet
- **The Canada destination** has historically been a destination sold via agencies due to the size of the country and the necessity of optimizing travel and enhancing the trip as much as possible due to often limited vacation time.
- However, it is a destination whose image of accessibility, via the language and hospitality of its inhabitants has clearly grown in recent years and has probably contributed to driving prospective customers to organizing the trip themselves.

d) Product/Packaging Trends

- Growing popularity of customized, 'à la carte' packages to the more or less significant detriment of organized tours, depending on the agency.
- This observation is explained by the search for:
 - More authenticity, closeness to local populations, while tours appear to limit human contact in favor of a succession of visits.
 - More typically local accommodation and of a human dimension like B&B's, cottages or 'quaint' hotels
 - Enjoying experiences abroad instead of just multiplying visits
"fewer stops but more experiences, enjoying the places more"
 - Customized trips
"we want a trip that resembles us"



15.1 French Travel Trade

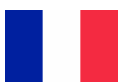
- Also an interest in “all inclusive” packages, especially for families.
- Travel periods are still short and even tend to become shorter, with customers who prefer fractioning their trips to be able to take at least two trips a year.
- **Canada** is a destination that typically sells as a customized trip, due to the many attractions and activities available, to the easy independence, access and mobility available once there.

e) Advertising/Promotional Trends

- In terms of communication, strong intensification of advertising for long distance travel.
- This trend has marked recent years but advertising is exclusively focused on attractive pricing, whether it be from Net operators (like Expédia, promovacances, Opodo, etc.), or low cost airlines.
- The impact is not necessarily positive, according to the professionals, since the often ‘false’ prices (i.e. subject to often unrealistic terms or not including tax) tend to mislead the consumer.

*“Those ads convey a false image of the budget required for a trip”
“The customer ends up not knowing how much a trip costs”
“A rather negative image of travel”*

- As a result, customers increasingly expect transparency in terms of the cost of a trip and details that justify prices--ad campaigns that do little to enhance the beauty and attractions of the different destinations.
- However, there has been an increase in the televised reports and documentaries geared to discovering new destinations or seeing an apparently familiar country from a new angle.
 - A very positive impact on driving desire to travel. *“customers pay more and more attention to reports”, “reports like on Thalassa, that’s the best advertising!”, “I often get requests after a popular report”*
 - TV actions to promote and discover Canada appear to be missing.



15.1 French Travel Trade

- Some agencies still count heavily on brochure mailing, which still appears to be a significant source of subsequent visits to the agency and travel purchases.

f) Forecast For The Next Five Years

- Systematic online flight purchases
- Increased specialization in travel agencies, with added value in terms of advice to develop "*for some trips, we'll always need the guarantee of an expert*"
- An intensification in customized /à la carte travel, customers who are becoming increasingly involved as their own travel agents, "*people won't want to be lemming tourists anymore*", "*people will no longer settle for just seeing, they'll want to do*"
- Travel that is increasingly respectful of the environment and local life.

However,

- An increase in organized tours featuring more thematic trips in small groups.
- Basic tours or classic trips (especially for sun fun) will still be in demand among people looking for rest, safety and supervision/care.

15.1 French Travel Trade

2. Canada's Image

a) Canada's Competition

- The main competitors to Canada depend on the season

Spring / summer:

- First and historically, **the United States**: corresponding to a comparable type of trip and budget, featuring wide open spaces and independent local travel.
- **France itself**, for the appeal of its natural areas and the diversity of its landscapes: French consumers essentially traveling domestically.
- And, more recently, **Australia** for the appeal of its natural areas and this destination's enhancement via specialized agencies that have been able to sell its attractions

Winter:

- For several years, **Scandinavia**, especially Lapland and Iceland, offering sports activities in snowy landscapes like those in Canada.
- Certain Alpine regions, especially French.

b) Canada's Strengths

- **Canadians' special conviviality and hospitality** compared to the United States in particular or to Scandinavia where human contact does not seem as easy and generates more apprehension "*they're so warm, it's a big motivation*"



15.1 French Travel Trade

- **The French language** implying:
 - The French feel a natural closeness to Canadians: Canadians seem almost like brothers to the French
 - A history, a past that raises interest in the French who feel they share some common roots.
 - The appeal of the language itself and its idioms / particularities
 - The feeling of being 'at home', a feeling of accessibility, safety, and easiness due to the lack of a language barrier *"you almost always feel at home in Canada"*
- **A country with noble, traditional values**, which seems to oppose the image the French have of the US and which they are beginning to regret not finding in their own country: respect, authenticity, simplicity, politeness, warmth, cleanliness, environmental protection, healthy lifestyles, etc. *"they have values to which the French aspire and they're ahead of us in environmental respect, that's the case in New Brunswick"*
- **The specificity of its landscapes**, albeit immense but especially, pure and intact, almost virginal.
- **The diversity of activities available** both winter and summer:
 - winter: skiing, sledding, snowmobiling, hunting, etc.
 - summer: hiking, horseback riding, canoe-kayaking, seaplane, fishing, hunting, etc.
- **Its cuisine**: not that there is a specific culinary culture but the feeling of being able to eat well and treat oneself in Canada, contrary to the United States.
- **The quality of its accommodation compared to American motels or hotel complexes**: accommodation that totally fits current trends: very typical, enabling contact with the locals, while offering very high quality and affordable services compared to the US. *"Canada is starting to have some nice accommodation in lodges out in the wilderness, ranches, magnificent typical spots, that's a real strength that the United States does not have"*

15.1 French Travel Trade

- **(min) A lower currency than in the US or Scandinavia:** a rather affordable local cost of living, especially in the east and in terms of accommodation and food. *"a local cost of living that is much lower than in Scandinavia"*
- **(min) Simple, less complex administrative formalities than the US**

c) Canada's Weaknesses

- Canada still has the **image of an expensive destination**, due to the country's distance compared to Scandinavia whose closeness can suggest more competitive travel prices, even if in reality, the difference is not that significant.
 - However, it is a destination that still requires a substantial budget:
 - ◆ The rather limited number of airlines leaving France (from Paris and even fewer from the provinces), reduces the effects of competition and therefore access to competitive prices.
 - ◆ Taxes are also higher due to the greater travel distance compared to Scandinavia.
- **A country that is too little known** outside of the eastern 'Quebec' region and especially the west, contrary to the United States which has for many years enjoyed indirect advertising from movies showing its contrasts and the wealth and variety of its geographical attractions *"there's the power of the American myth, Canada is only perceived as a cousin", "people don't know about the treasures of the west coast"*
 - A regional diversity in Canada that is not at all perceived, contrary to the United States which can promise great natural spaces, the appeal of big cities and resorts, *"in the US, there is greater diversity, you can do everything there", "the United States is better known and people know more about what they want to do there"*
 - This poor knowledge of the country can raise fears of not knowing what to do there, except see immense wilderness with great lakes and pine forests. *"an image that's a bit too Nature, so people don't really know what there is to do there"*



15.1 French Travel Trade

- For some, this results in an image of a country that is a bit too 'subdued', dull, a feeling of its lacking exoticism *"an image that sometimes lacks spice and originality", "it lacks a mythical dimension"*
- **Climate:** the image of a cold, hostile climate for most of the year, especially in winter.
 - The French clientele is very eager for warmth and sunshine, which is still a must for a large portion of the clientele.

"Feeling that the period in which they could go without being cold is very short", "the cold is a big barrier for the French public"

- **Cities:** even if a visit to Montreal or Toronto is appealing, the big Canadian cities do not seem as appealing as the big American cities like New York, LA, Chicago, San Francisco, Las Vegas, etc. *"customers dream of going to see the lights in LA, to ogle the skyscrapers in New York, visit the Big Apple, that's not the case with Montreal or Toronto...", "people prefer the big mythical American cities"*

d) Ideal Brand Image

The current view of Canada by the French:

- Globally, a **very positive and engaging image** conveyed by:
 - **The beauty, authenticity and scope of its natural areas:**
Its great spaces, its immensity, the feeling of freedom and renewal it delivers, the wealth of its plant and animal life, its preserved, intact, almost primal side;
- outstanding interest for Niagara Falls, whale watching and bear watching.
 - **French language**
 - **The warmth and friendliness of Canadian people:** strong impact of Canadian singers who are very popular in France
 - **Safety, accessibility:** a family destination *par excellence*



15.1 French Travel Trade

- **The “ecology” image** of a healthy, sporty, Nature destination
- **The many activities, on a fun, family register:** visits to reconstructed villages, acrobatics, igloo construction, animal observation, etc.
- However, **a somewhat stereotypical and restrictive image of the country**, focused exclusively on French-speaking eastern Canada:
 - **An image that is too cliché**, limited to a Maple leaf and the Quebecois accent.
 - **An image that is too globalizing / unified and not contrasted**, that does not stress the country’s diversity enough, or its different regions, especially the attractions on the west coast even though they have strong potential for exoticism.
 - ◆ A tendency to visit the big tourist sites which are increasingly Americanized and far from the authenticity and simplicity of less visited areas
 - **Poor knowledge of the advantages / appeal of the big cities**
 - **Poor knowledge of the scope and diversity of the activities available there.**

In other words, a destination that suffers from a lack of communication. A necessity to expand the narrow view of Canada:

- Not limited to just the great natural spaces with big lakes and forests, moose and maple trees.



15.1 French Travel Trade

In major and by order of importance:

- First, promote all of the wealth and diversity of the country through the appeal of the west and the less well-known regions like the maritime provinces and New Brunswick, "*promote the wonderful landscapes of the maritime provinces, the island of Newfoundland, Nova Scotia, all of those untamed places that are not well known at all*"
- Stress the human dimension and Canadians themselves, their friendliness / hospitality, but not only Quebecois "*say it's a country that offers a warm welcome, where contact is easy, but everywhere, not just in Montreal*"
- Promote the country's history beyond the French aspect, the cultural side, as well, with the American Indians, in particular
- Enhance more urban, city tourism, "*make packages to promote Montreal like New York*"
- Stress the originality of the existing products, showing the diversity of activities specific to each site.

In minor:

- Convey a more upscale, modern, dynamic image, break away from the rustic side.



15.1 French Travel Trade

3. Travel Products

a) Selection criteria for travel products

- By order of importance:
 1. Price: a constant search for competitiveness and the need to control spending in advance, expectations for transparency explaining the increasing appeal of "all inclusive" deals, even for customized trips
"need to be reassured about the price"
 2. The appeal of the destination / its reputation
 3. Safety: being sure of political stability to avoid any risk of terrorist attacks, for example
 4. Increasingly, the quality of accommodations, with priority to quaint hotels or B&B's
 5. Climate: expectations for fine weather, hot and sunny in the summer and not too harsh in winter.
 6. Available activities (for families)
 7. Restaurants: a need for quality and variety
- In general, the often very ambivalent and contradictory French customer looks for:
 - Both safety and comfort, but at the same time authenticity and simplicity.
 - Attractive prices but at the same time quasi premium services

b) Main reasons for traveling to Canada

- The appeal of its immense, primal, preserved wilderness
- Frenchness (language, history and connection with France)
- Hospitality / conviviality
- The authenticity of the Canadian culture and spirit

Most want to visit Niagara Falls, see the lakes, hike the forests, visit the big cities like Montreal and Quebec City, and see the animals (bear, whale, elk).



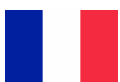
15.1 French Travel Trade

c) Common Itineraries

- Unanimously, the customized auto tour trip is by far the most appealing in the summertime, in other words:
 - Buying a flight + car rental + nights reserved in advance, preferably in B&B's or small hotels
 - For an average length of two weeks
 - On average for a family of 2/3 children or two couples
- Plus, requests for activity reservations in advance:
 - Ex. in summer: flying over the whales in a seaplane, a canoe or kayak trip, visits to zoos and, more recently, spending a night with the Indians, visits to reconstructed villages, acrobatics
 - And in winter: snowmobiling, skiing, sledding trips, heli-ski (being let off at the top of a mountain by helicopter and skiing off-trail), building an igloo, etc.
- Then come organized tours, geared to a more security-minded clientele, that is often quite mature, around 60, or else to special employee groups (Company Employee Committee groups)

d) The regions emphasized or enhanced

- A destination that is still strongly focused on the French-speaking part: Quebec, Ontario, and more recently and more rarely, Gaspésie:
 - Few other regions are promoted, due to the lack of demand as well as to the lack of sales staff training "*Quebec weighs heavily*", "*In summer, we only sell eastern Canada*", "*we take regular training courses to learn about other regions, but we forget quickly because we sell the west very little*"
 - Especially for their first trip, French consumers like the French-speaking part for the easy communication and feeling of security it implies "*hard to sell the west for a first trip*"



15.1 French Travel Trade

- Only the very specialized agencies like Voyageurs du Monde, or Groupe NPP Terre Canada, try to promote new, little known regions, even if the majority of the products sold are still classic and focused on Quebec and the east. The regions recently promoted are:

- Newfoundland
- Nova Scotia
- New Brunswick, Iles-de-la-Madeleine
- Acadia

With more difficulty,

- British Columbia
- Alberta
- More rarely, for the enthusiasts, the Yukon
- Prairies

"We sold a cruise of Antarctica to Newfoundland, we set it up last year"

Specialized agencies selling products more for repeaters, people who want to go beyond stereotypes *"people who have already been to Canada might feel like discovering the west on their 2nd trip"*

e) Customer profiles for Canadian destinations

- A diversity of profiles, in terms of age and income, but all like Nature / wilderness and are quite dynamic and curious.
- However, a large portion of families with two children, aged between 35 and 55 with comfortable incomes (managerial level)
- Budget between 1500 and 2300 euros per adult.

15.1 French Travel Trade

f) New Product Ideas

- The problem with Canada is not so much a lack of products on offer but more the lack of communication on all of the regions unknown to the public, outside of the eastern and French-speaking regions

"it's not a problem of products or fit, as soon as you do something more original in small groups, prices immediately rise and beyond a certain level, you can't sell it"

"the products exist, the problem is making them known to people"

- The specialized agencies, with the help of their local receivers, are able to offer very original thematic products, including for the west.
- However, the so-called specialized yet still quite generalist agencies lack specific products like:
 - Products featuring "cities and wilderness" instead of "exclusively Nature", even if the cities do not seem very appealing to the public because they are poorly known: in particular, taking advantage of Quebec bicentennial
 - Products with specific themes on a given region like cultural discoveries in cities, ethnic (Indians) in the west or sports activities in natural sites like rafting, acrobanching, life on a ranch, etc.
"products that promote activities in a specific region"
 - Products that would make it possible to combine east/west but with the problem of traveling periods which are often too long.

To develop new products, some agencies regret the lack of receivers on site.

15.1 French Travel Trade

g) Key Barriers

- Very few barriers related to the country, on the contrary, first-time travellers are often very motivated and recent visitors are enchanted with their trips.
"people always come back very satisfied", "there are people who boycott the USA, it's not the case for Canada"
- The few possible barriers could be:
 - The lack of knowledge of the country's regional diversity and the west, which could convey the feeling of a lack of contrast and monotonous landscapes.
"no communication relays, either on billboards or on TV, you have to create desire", "by constantly doing the same ads for Canada, you end up with an image that's too even, too strict, too Swiss!"
 - The climate is perceived as too harsh or else favorable for only a short period during the year
- Otherwise, the other potential barriers are:
 - The quite substantial budget required, with rather long, customized travel formats

Problems agencies have in selling the destination

- No real notable difficulty in selling the destination in the agency:
 - No problems with flight availability,
 - Dependable service providers, quite quick response from local receivers even if not always adequate the first time around,
 - Communication materials in agencies like flyers from the CCT and the brochures, which are considered as sufficient and effective.

15.1 French Travel Trade

However:

- A need for more information on the different regions via specific documents, more regular conferences, etc.
- Insurance problems when risky activities are planned,
- Unanimous regret for the lack of communication to the general public

Reasons why Canada is among the dream destinations but not often materialized

- Professionals are surprised to learn that Canada is a dream destination given the lack of knowledge and myth surrounding this country.
- Also, little explanation is given for this low visit rate, if only perhaps:
 - The necessary budget,
 - The lack of relevant communication, via reports and movies, conveying a dynamic, contemporary image of Canada rather than exclusively focused on the wilderness, lakes and forests,
 - The tendency of travellers to Canada to handle their travel plans on their own,
 - Competition from other, cheaper and 'trendier' destinations, especially sunny destinations in the summertime



15.1 French Travel Trade

4. Trade Support

a) Improving Marketing

- Conduct a campaign for the general public using impactful images showing other aspects of Canada than the usual clichés.
 - A visual campaign on cars considered as ineffective *"what they did with the Smart cars, ho-hum, better to do billboards that speak to people"*
- The Canadian tourist office (CCT) could directly provide information to French travellers interested in the destination.
"the CCT should be open to the public, they should put out documents on the activities, hot spots, restaurants..."
- Hold more special events on Canada, by promoting the diversity of the country's attractions / regions
"make people discover the regions, the Canadian commission could help us on that level"
- Provide visuals, photos or even films to push the brochures or for use on agency Web sites
"we often have difficulty finding good pictures that are not clichés and will make people want to go there"
- Devise specific communication programs by target and by country,
"Destination Quebec has European communication plans, that's too global, there is no consideration of the target, just an overall façade", "focus the visuals on what makes the French dream, communication outside of Canada is the same for all destinations"
- Continue with fairs like Rendez vous Canada and Westmark in Vancouver, to help develop products, meet conference people, etc.

15.1 French Travel Trade

- Continue the “Canada specialists” training program and help send agents to the field, the current learning trips are seen as insufficient.
- Provide point of sale advertising (POS) materials, renewed each season,
- Official Internet sites are poorly referenced and difficult to access on the Net,
“They’ve been doing sites for four years but don’t have good referencing, so it’s worthless”
- Merge the Montreal and Quebec Canadian tourist offices to combine their budget and conduct wide-reaching joint actions.

“They should pool their interests, they each have their own budget on their own, the number 1 advantage of Canada is Quebec, they should use it”

“A big problem, Destination Quebec, Tourism in Montreal and the Canadian Tourism Commission, I have 3 different contacts, it’s not always clear”

“Have more partnerships between the CCT and Bonjour Quebec”

- Supply documentation, a guide on Canada to give to the clientele before departure. *“When people leave, we don’t have anything to give them, we give them a road book but it lacks goodies, nothing on Canadian culture, we lack documentation”*

15.1 French Travel Trade

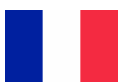
Key messages to stress

- Maintain a strong Canadian identity to better distinguish it from the USA: put the accent on breathtaking landscapes, animal watching and the people.
- Regional diversity
"there are so many things to discover, it's great", "make several small campaigns by showing the diversity", "show that it's not a monolithic country"
- The customized, personalized dimension
"the trip tailored to you", "a destination for you", "stress the customization, the consumer's ego"
- The country's modern, dynamic side, break away from the tacky clichés,
"Quebec communicates too much on ultra-conventional, totally familiar things"
- The "mythical" side of Canada

"Canada doesn't at all capitalize on its romance, Canadian cinema isn't powerful enough"

"There's a whole story about the conquest of the Canadian west that is unknown"

"What lacks most about Canada, is the legendary aspect, even though it exists"



15.1 French Travel Trade

Recommendations

- General public communication on regional diversity, especially the west (films, reports, special events, conference speakers, etc.)
 - A different communication tone, that is more avant-garde
 - Better selection of communication media (no communication on cars)
- Optimized referencing of their official sites
- Pooling resources between Quebec and Canada
- Reducing taxes to lower travel costs

b) Relationship with the CCT

- A very positive perception with special appreciation of:
 - Their dynamism in the actions they conduct. *"the new director comes from industry, things have changed a lot, they're on the move!"*
 - Their availability, *"they are very reactive and available"*
- Overall, a close relationship between the agency managers and CCT people *"yes, we're very close", "they are very present, to the extent their resources allow in any case", "excellent relationship with them"*
 - Help in setting up booths and events during the international tourism show
 - Support in running discovery nights held by the specialized agencies
 - The "Canada specialists" program, which was a real success

15.1 French Travel Trade

- However, respondents expressed expectations for improved services or new actions:
 - Re-launch the specialist training program to promote more specific knowledge of the regions
 - Merge with the other bodies in charge of Canadian tourism
 - Renew POS materials between summer and winter
 - Interface more between the agencies and local receivers.
 - Help produce TV shows or reports
 - Convince the Canadian authorities to give more resources to promoting Canada in France.
 - Develop actions in the French provinces, not just in Paris. *"more resources for the French regions"*
- A newsletter that is appreciated and considered of interest with clever information even if not everyone takes the time to read it, due to lack of time.

C) Perception of the brochures

- A eye-catching tool for customers who do not know about the content of a trip. It is not a tool for materializing the trip.
 - It is a basis for discussion because people usually prefer designing their own customized program which they can do thanks to the sales person's knowledge.
- For most agents, this document covers most of the customer expectations *"the offer they propose is so diversified that it ultimately covers all the essential needs"*
- However, some agencies admit that certain brochures lack visual impact and still offer unappealing tours for travellers who are mostly tempted by customized trips

The brochures are too 'heavy' with too much text, lacking visuals to make people dream *"they should put more dreams into their brochures"*



15.1 French Travel Trade

5. Canadian Receptives

a) Product Needs

- Dealing with French tourists on a regular basis gives Canadian receptives a very good handle on market needs:

“They want to see wildlife, go canoeing, hiking in the forest (although not on their own but with a guide for security), see natives, stay in rustic log cabins”

“ They expect and want to meet welcoming people”

“They are not into cities”

- All of these desires point to a goal of getting emersed into the Canadian landscape and its people.
- Beyond Quebec, the French look for a French connection. In Manitoba, one operator has great success with a French focused itinerary which includes:
 - A day in the French quarter of Winnipeg
 - Louis Riel history
 - Fur trade history featuring French voyageurs
 - Paddling historic canoe routes used by the fur traders
- However, also in Manitoba, the French love the north—Churchill, polar bear viewing, beluga whale watching, fishing, Northern Lights.

15.1 French Travel Trade

- What they do not want, as noted by the French trade, is Canadian cities to any significant degree other than as a gateway. They have city experiences in spades within Europe.
- What really blows them away, according to one operator is asking for guest measurements before they leave on the trip to Canada (and Manitoba). The purpose is to be able to outfit them in fur trader costumes at an event while in the province.
 - This is an excellent example of involving the tourist and truly making the trip experiential.
- They note that most visitors to Western Canada are repeat visitors to Canada, the first trip the mandatory Quebec visit.

b) Communication

- In terms of communicating the Canadian experience, receptives are quite unanimous:
 - Avoid focusing on the big cities
 - Treat them more as gateways
 - Feature all the unique elements or add-ons available to the French tourist in Canada:
 - Snowmobiling
 - Dog sledding
 - Quebec City's ice hotel
 - Log cabin dinners
 - Sea planes
 - River rafting
 - Wine tasting
 - treks in the forest
- These are all relatively unique experiences and truly authentic. The desire for authenticity is a primary goal not just of the French, but the Germans, the Brits and tourists from other continents as well. It is clearly a critical selling proposition for Canada.

15.1 French Travel Trade

- Smiling, friendly people are also an important value added asset of Canada's that needs to be reinforced.

c) Trade Assistance

- As for other countries, Canadian receptives have a wide range of interesting product available, but tour operators are unwilling to pick them up. Unless it is proven that demand exists, they are reluctant to devote precious space in their brochures to them.
- Many believe that agents in France need better training and exposure to the Canadian experiences available.
- A general consensus is that most receptives in Canada are "on our own", as funds and trade support are directed to the offshore markets.
- Related to the lack of a relationship, some say "I wouldn't know how to use them (CTC)"



15.1 French Travel Trade

Travel Trade Summary

- The French travel trade believes that one of the chief barriers to travel to Canada is the lack of awareness and knowledge of the diversity of attractions. These include:
 - Regional diversity—in particular Western Canada
 - The activities of the earlier French settlers in Central and Western Canada beyond Quebec
 - The Acadian connection in Atlantic Canada
 - Soft adventure relatively unique to the country—e.g. dog sledding, snowmobiling, seaplane travel in summer
 - The opportunities for family fun and education—igloo construction, acrobatics, animal observation, for example
 - Aboriginal tourism
- Another real strength of Canada, reflecting words heard in the UK as well as Germany, is the friendly people. Canadian friendliness and hospitality should be front and center along with its nature attractions in positioning the country.
- The trade also notes that the CTC, Destination Quebec, and Tourism Montreal all work independently and should pull together to create greater synergy.
 - *"I have 3 different contacts and it is not always clear who I should speak to"*
- However, the CTC is praised for the work it has been doing:
 - *"they are very present, to the extent their resources allow in any case",*
 - *"excellent relationship with them"*
 - They help in setting up booths and events during the international tourism show
 - Support in running discovery nights held by the specialized agencies
 - The "Canada specialists" program, which was a real success

15.1 French Travel Trade

- Nonetheless, respondents expressed a desire for improved services or new actions:
 - Re-launch the specialist training program to promote more specific knowledge of the regions
 - Merge with the other bodies in charge of Canadian tourism
 - Renew POS materials between summer and winter
 - Interface more between the agencies and local receivers.
 - Help produce TV shows or reports
 - Convince the Canadian authorities to give more resources to promoting Canada in France.
 - Develop actions in the French provinces, not just in Paris.
 - *"more resources for the French regions"*

Appendix

Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

France Travel Survey

We are conducting a survey on international pleasure travel. The purpose of the survey is not to sell you anything, but to get your opinions on travel.

1) In which area do you currently reside? (Please select one)

- ☐ Alsace
- ☐ Aquitaine
- ☐ Auvergne
- ☐ Brittany
- ☐ Burgundy
- ☐ Center
- ☐ Champagne-Ardenne
- ☐ Corsica
- ☐ Franche-comte
- ☐ Languedoc-Roussillon
- ☐ Limousin
- ☐ Lorraine
- ☐ Lower-Normandy
- ☐ Midi-Pyrenees
- ☐ North-Calais
- ☐ Paris-Isle-of-France
- ☐ Pays-de-la-Loire
- ☐ Picardy
- ☐ Poitou-Charentes
- ☐ Provence-Alpes-Azur
- ☐ Rhone-Alps
- ☐ Upper-Normandy
- ☐ None of the above

☐ TERMINATE

2) Are you...

- Male ☐
- Female ☐

50/50 Gender Split

3a) In which of the following age categories do you belong?

- Under 18 ☐
- 18-19 ☐
- 20-24 ☐
- 25-29 ☐
- 30-34 ☐
- 35-39 ☐
- 40-44 ☐
- 45-49 ☐
- 50-54 ☐
- 55-59 ☐
- 60-64 ☐
- 65-69 ☐
- 70-74 ☐
- 75 and over ☐

☐ END INTERVIEW

MINIMUM N=200 OF
AGED 60+

3b) Occupations are of interest to us in this survey. Do you or does anyone in your household work full time for any of the following:

- Market research ☐
- Travel and tourism industry ☐
- An advertising agency ☐
- A newspaper, radio or TV station ☐
- None of the above ☐

☐ TERMINATE
☐ IF CHECKED

3c) In the past three years, that is since September, 2004, how many times have you, yourself, taken a pleasure trip outside of your home country for 3 nights or longer with at least one night in paid accommodation. Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

_____ trips [ACCEPT RANGE 1-99]
None ☐

The following questions that we are going to ask you concern only long-haul pleasure trips. By that we mean pleasure trips beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation. It includes all trips for pleasure or personal reasons including to visit friends and relatives as well as trips where you combined business with a pleasure trip. However, it excludes any trips that were for business purposes only or for study purposes only. (IF NONE IN Q.3C SKIP TO Q.5)

4) In the past three years, that is since September, 2004, how many times have you, yourself, taken a pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation? Again, please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only.

_____ trips [ACCEPT RANGE 1-99] [MUST BE EQUAL OR LESS THAN Q.3C]
None ☐

5) In the next two years, that is before September, 2009, how likely is it that you will take a pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation? Are you: (Select one only)

- Definitely going to take such a trip ☐
- Very likely to take such a trip ☐
- Somewhat likely to take such a trip ☐
- Not very likely to take such a trip ☐
- Not at all likely to take such a trip ☐

IF NONE, IN Q.3c OR 4 AND IF SOMEWHAT, NOT VERY OR NOT AT ALL LIKELY IN Q.5 END INTERVIEW

- 2 -

- 1 -

Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

6a) Thinking of future travel beyond the European Union countries, North Africa and the Mediterranean, what countries would you be likely to visit on a pleasure trip for 3 nights or longer with at least one night in paid accommodation in the next two years? Please include all trips for pleasure or personal reasons, to visit friends and relatives and trips where you combined business with a pleasure trip. Please exclude any trips that were for business purposes only, or for study purposes only. (Please select your most likely choices with up to 5 countries from the list below or write in your choices if not listed) (PN: LIST FROM Q.7 WITH CODES 14-31, 46-50, 52 SUPPRESSED)

Russia	Russia	<input type="checkbox"/>
Orient/Asia	China	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>
	Japan	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>
	India	<input type="checkbox"/>
	Other Orient/Asia	<input type="checkbox"/>
Pacific	Australia	<input type="checkbox"/>
	New Zealand	<input type="checkbox"/>
	Other Pacific	<input type="checkbox"/>
North America	Canada	<input type="checkbox"/>
	United States	<input type="checkbox"/>
South/Central America	Argentina	<input type="checkbox"/>
	Brazil	<input type="checkbox"/>
	Mexico	<input type="checkbox"/>
	Other South/Central America	<input type="checkbox"/>
Caribbean	Caribbean	<input type="checkbox"/>
Middle East	Dubai	<input type="checkbox"/>
	Iran	<input type="checkbox"/>
	Israel	<input type="checkbox"/>
	Lebanon	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>
Africa	South Africa	<input type="checkbox"/>
	Other Africa, excluding North African countries	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	None	<input type="checkbox"/>

51 (52 BLANK)
53
☐ SKIP TO Q.7

- 3 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

6b) From the countries you selected please rank those countries starting with the one you would likely visit first, then second, third and so on. (PROGRAMMING: SHOW UP to 5 DESTINATIONS SELECTED IN 6a)(If only one selected in Q6a skip to Q7)

		1 st	2 nd	3 rd	4 th	5 th
Russia	Russia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orient/Asia	China	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Japan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	India	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Orient/Asia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pacific	Australia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	New Zealand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Pacific	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
North America	Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	United States	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
South/Central America	Argentina	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Brazil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other South/Central America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caribbean	Caribbean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle East	Dubai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Iran	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Israel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Lebanon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Africa	South Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other Africa, excluding North African countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 4 -

Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

7) (ASK THOSE WHO ANSWERED 1+ IN Q.4, OTHERS SKIP TO Q.20) (ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF NONE IN Q.4) During the past 3 years which of these countries or destinations outside France did you visit for pleasure and stayed for 3 nights or longer with at least one night in paid accommodation, if any?

Russia	Russia	<input type="checkbox"/> 1
Orient/Asia	China	<input type="checkbox"/> 2
	Hong Kong	<input type="checkbox"/> 3
	Japan	<input type="checkbox"/> 4
	Singapore	<input type="checkbox"/> 5
	Malaysia	<input type="checkbox"/> 6
	Thailand	<input type="checkbox"/> 7
	Vietnam	<input type="checkbox"/> 8
	India	<input type="checkbox"/> 9
	Other Orient/Asia	<input type="checkbox"/> 10
Pacific	Australia	<input type="checkbox"/> 11
	New Zealand	<input type="checkbox"/> 12
	Other Pacific	<input type="checkbox"/> 13
Eastern Europe	Bulgaria	<input type="checkbox"/> 14
	Czech Republic	<input type="checkbox"/> 15
	Hungary	<input type="checkbox"/> 16
	Poland	<input type="checkbox"/> 17
	Romania	<input type="checkbox"/> 18
	Other Eastern Europe	<input type="checkbox"/> 19
Western Europe	Austria	<input type="checkbox"/> 20
	Belgium	<input type="checkbox"/> 21
	United Kingdom	<input type="checkbox"/> 22
	Germany	<input type="checkbox"/> 23
	Greece	<input type="checkbox"/> 24
	Ireland	<input type="checkbox"/> 25
	Italy	<input type="checkbox"/> 26
	Netherlands	<input type="checkbox"/> 27
	Portugal	<input type="checkbox"/> 28
	Spain	<input type="checkbox"/> 29
	Switzerland	<input type="checkbox"/> 30
	Other Europe	<input type="checkbox"/> 31
North America	Canada	<input type="checkbox"/> 32
	United States	<input type="checkbox"/> 33
South/Central America	Argentina	<input type="checkbox"/> 34
	Brazil	<input type="checkbox"/> 35
	Mexico	<input type="checkbox"/> 36
	Other South Central America	<input type="checkbox"/> 37
Caribbean	Caribbean	<input type="checkbox"/> 38
Middle East	Dubai	<input type="checkbox"/> 39
	Iran	<input type="checkbox"/> 40
	Israel	<input type="checkbox"/> 41
	Lebanon	<input type="checkbox"/> 42
	Turkey	<input type="checkbox"/> 43
	United Arab Emirates	<input type="checkbox"/> 44
	Other Middle East	<input type="checkbox"/> 45
Africa	Egypt	<input type="checkbox"/> 46
	Kenya	<input type="checkbox"/> 47
	Morocco	<input type="checkbox"/> 48
	Tanzania	<input type="checkbox"/> 49
	Tunisia	<input type="checkbox"/> 50
	South Africa	<input type="checkbox"/> 51
	Other Africa	<input type="checkbox"/> 52
	Other (specify) _____	<input type="checkbox"/> 53 BLANK
	Other (specify) _____	<input type="checkbox"/> 54
	Other (specify) _____	<input type="checkbox"/> 55
	Other (specify) _____	<input type="checkbox"/> 56
	None	<input type="checkbox"/>

[PN: MAKE SURE AT LEAST ONE COUNTRY IS CHECKED. IF NONE, TERMINATE]
[PN: IF CHECKED ANY OF THE BOXED DESTINATIONS (CODE 14-31, 46-50), AND IF AT LEAST ONE COUNTRY OUTSIDE OF CODE 14-31, 46-50 IS NOT CHECKED TERMINATE.]

- 5 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

(ONCE MAIN SAMPLE IS COMPLETED AND ONLY LOOKING FOR AUGMENT SAMPLE TERMINATE IF CANADA IS NOT SELECTED IN Q.7) (QUOTA N=400 FOR AUGMENT IS BASED ON CANADA SELECTED IN Q.7)

(PN: AUGMENT QUOTA - 400 IN TOTAL MUST SELECT CANADA IN Q.7 (INCLUDES THOSE FROM THE MAIN SAMPLE (FOR EXAMPLE IF WE OBTAIN 100 FROM THE MAIN SAMPLE ONLY NEED 300 - FLAG THOSE FROM THE MAIN SAMPLE VS. AUGMENT))

8a.) Thinking about your most recent pleasure trip of 3 nights or longer with at least one night in paid accommodation to somewhere beyond the European Union countries, North Africa and the Mediterranean, which of these places did you visit on that trip? (PN: LIST FROM Q.7 WITH CODES 14-31, 46-50, 52 SUPPRESSED)

Russia	Russia	<input type="checkbox"/>
Orient/Asia	China	<input type="checkbox"/>
	Hong Kong	<input type="checkbox"/>
	Japan	<input type="checkbox"/>
	Singapore	<input type="checkbox"/>
	Malaysia	<input type="checkbox"/>
	Thailand	<input type="checkbox"/>
	Vietnam	<input type="checkbox"/>
	India	<input type="checkbox"/>
	Other Orient/Asia	<input type="checkbox"/>
Pacific	Australia	<input type="checkbox"/>
	New Zealand	<input type="checkbox"/>
	Other Pacific	<input type="checkbox"/>
North America	Canada	<input type="checkbox"/>
	United States	<input type="checkbox"/>
South/Central America	Argentina	<input type="checkbox"/>
	Brazil	<input type="checkbox"/>
	Mexico	<input type="checkbox"/>
	Other South/Central America	<input type="checkbox"/>
Caribbean	Caribbean	<input type="checkbox"/>
Middle East	Dubai	<input type="checkbox"/>
	Iran	<input type="checkbox"/>
	Israel	<input type="checkbox"/>
	Lebanon	<input type="checkbox"/>
	Turkey	<input type="checkbox"/>
	United Arab Emirates	<input type="checkbox"/>
	Other Middle East	<input type="checkbox"/>
Africa	South Africa	<input type="checkbox"/>
	Other Africa, excluding North African countries	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>
	Other (specify) _____	<input type="checkbox"/>

(PN: SHOW THE WHOLE LIST OF COUNTRIES FOR Q.8A. (PN: MULTIPLE DESTINATIONS ALLOWED. NO LIMITS))

- 6 -



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

8b.) (IF CANADA IN Q. 8a) ASK) While you were in Canada on that trip, which of the following places did you visit, if any?

	Yes	No
British Columbia (includes Vancouver, Victoria and Whistler)	<input type="checkbox"/>	<input type="checkbox"/>
Alberta (includes Calgary, Edmonton, Banff, and Jasper)	<input type="checkbox"/>	<input type="checkbox"/>
Saskatchewan (province)	<input type="checkbox"/>	<input type="checkbox"/>
Manitoba (province)	<input type="checkbox"/>	<input type="checkbox"/>
Ontario (includes Ottawa, Toronto and Niagara Falls)	<input type="checkbox"/>	<input type="checkbox"/>
Quebec (includes Montreal and Quebec City)	<input type="checkbox"/>	<input type="checkbox"/>
Nova Scotia (Atlantic Canada)	<input type="checkbox"/>	<input type="checkbox"/>
New Brunswick (Atlantic Canada)	<input type="checkbox"/>	<input type="checkbox"/>
Prince Edward Island (Atlantic Canada)	<input type="checkbox"/>	<input type="checkbox"/>
Newfoundland and Labrador (Atlantic Canada)	<input type="checkbox"/>	<input type="checkbox"/>
Yukon Territory (Northern Canada)	<input type="checkbox"/>	<input type="checkbox"/>
Northwest Territories (Northern Canada)	<input type="checkbox"/>	<input type="checkbox"/>
Nunavut (Northern Canada)	<input type="checkbox"/>	<input type="checkbox"/>

9a) What were your reasons for travelling to (Q.8a DESTINATION -PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? (check as many as apply).

9b) Which of those was your main reason for travel? (please check one only) [PN: SHOW THOSE CHECKED IN Q.9a]

	9a	9b
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches, and mountains	<input type="checkbox"/>	<input type="checkbox"/>
Honeymoon	<input type="checkbox"/>	<input type="checkbox"/>
To experience local culture	<input type="checkbox"/>	<input type="checkbox"/>
To interact with the local people	<input type="checkbox"/>	<input type="checkbox"/>
To visit historic sites, museums, or galleries	<input type="checkbox"/>	<input type="checkbox"/>
To visit protected areas, including Nature Reserve, Regional or National parks (French: To visit Parc naturel national ou Parc naturel régional)	<input type="checkbox"/>	<input type="checkbox"/>
To attend festivals and/or events	<input type="checkbox"/>	<input type="checkbox"/>
To see and watch wildlife	<input type="checkbox"/>	<input type="checkbox"/>
To view aboriginal sites and events	<input type="checkbox"/>	<input type="checkbox"/>
For entertainment and nightlife	<input type="checkbox"/>	<input type="checkbox"/>
To go shopping	<input type="checkbox"/>	<input type="checkbox"/>
To go downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
To see new places	<input type="checkbox"/>	<input type="checkbox"/>
To visit a spa, health centre, or hot springs	<input type="checkbox"/>	<input type="checkbox"/>
Low rates, good deals, and discounts	<input type="checkbox"/>	<input type="checkbox"/>
To relax, unwind, and decompress	<input type="checkbox"/>	<input type="checkbox"/>
To participate in outdoor activities	<input type="checkbox"/>	<input type="checkbox"/>
To visit friends and relatives	<input type="checkbox"/>	<input type="checkbox"/>
A trip that combined business with pleasure	<input type="checkbox"/>	<input type="checkbox"/>
To realize a long term dream	<input type="checkbox"/>	<input type="checkbox"/>
To experience big cities in another country	<input type="checkbox"/>	<input type="checkbox"/>
To be together as a family	<input type="checkbox"/>	<input type="checkbox"/>
Other reasons	<input type="checkbox"/>	<input type="checkbox"/>

- 7 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

10a) On that trip to (Q. 8a) DESTINATION -PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS), how many nights, in total, were you away from home? [ACCEPT RANGE 3-999]

_____ nights

10b) (IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in Canada? [ACCEPT RANGE 1-999. EQUAL TO OR LESS THAN Q.10a]

_____ nights

10c) (IF CANADA IN Q.8a, ASK) How many nights, in total, did you spend in the United States on that trip, if any? [ACCEPT RANGE 1-999. EQUAL TO OR LESS THAN Q.10a]

_____ nights None ☐

[PN: PLEASE MAKE SURE THE SUM OF Q.10b and Q.10c IS EQUAL TO OR LESS THAN THE NUMBER IN Q.10a]

[PN: SKIP Q.10C AND AUTO PUNCH NONE AT Q.10C IF ANSWER AT Q.10a EQUAL TO ANSWER AT Q.10b]

10d) (IF CANADA IN Q. 8a) ASK (ONLY LIST PLACES VISITED IN Q. 8b) How many nights did you spend in each province or territory on that trip? [ACCEPT RANGE 0-999]

	NIGHTS
British Columbia (includes Vancouver, Victoria and Whistler)	_____
Alberta (includes Calgary, Edmonton, Banff, and Jasper)	_____
Saskatchewan (province)	_____
Manitoba (province)	_____
Ontario (includes Ottawa, Toronto and Niagara Falls)	_____
Quebec (includes Montreal and Quebec City)	_____
Nova Scotia (Atlantic Canada)	_____
New Brunswick (Atlantic Canada)	_____
Prince Edward Island (Atlantic Canada)	_____
Newfoundland and Labrador (Atlantic Canada)	_____
Yukon Territory (Northern Canada)	_____
Northwest Territories (Northern Canada)	_____
Nunavut (Northern Canada)	_____

TOTAL MUST EQUAL ANSWER TO Q.10b)

- 8 -

Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

11. And when did you take that trip to (DESTINATION IN Q.8a-PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? Please tell me the year and month you started that trip?

Year	[ACCEPT 2004 TO CURRENT YEAR]
Month	
January	<input type="checkbox"/>
February	<input type="checkbox"/>
March	<input type="checkbox"/>
April	<input type="checkbox"/>
May	<input type="checkbox"/>
June	<input type="checkbox"/>
July	<input type="checkbox"/>
August	<input type="checkbox"/>
September	<input type="checkbox"/>
October	<input type="checkbox"/>
November	<input type="checkbox"/>
December	<input type="checkbox"/>

MUST
CHECK
ONE

12. With whom did you travel on that trip to (DESTINATION IN Q.8a- PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? (check as many as apply)

Travelled alone	<input type="checkbox"/> SKIP TO Q.14a
Wife/husband/girlfriend/boyfriend	<input type="checkbox"/>
Child(ren)	<input type="checkbox"/>
Parent(s)	<input type="checkbox"/>
Other relatives	<input type="checkbox"/>
Friends	<input type="checkbox"/>
Organized group/club/etc	<input type="checkbox"/>
Business associates/colleagues	<input type="checkbox"/>
Other (specify)	_____

- 13a) Including yourself, how many people were there in your immediate travel party? Please be sure to record your immediate travel party, not people that were part of a larger group.

_____ People [2-99]

- 13b) And how many of those were under 18 years of age, if any?

_____ People [0-99] **PN: SHOULD BE LESS THAN Q.13A**

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

- 14a) Were any of the following a source of inspiration for you to decide to travel to (PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS) (DESTINATION IN Q.8a)? (please select as many as apply)

- 14b) Which of those was the main source of inspiration for choosing that destination? (please select one only) (PN: SHOW THOSE CHECKED IN Q.14a)

	14a	14b
Television travel show	<input type="checkbox"/>	<input type="checkbox"/>
Other television show	<input type="checkbox"/>	<input type="checkbox"/>
Saw a film on destination	<input type="checkbox"/>	<input type="checkbox"/>
Celebrity travelled there	<input type="checkbox"/>	<input type="checkbox"/>
Story in a magazine or newspaper	<input type="checkbox"/>	<input type="checkbox"/>
A news story	<input type="checkbox"/>	<input type="checkbox"/>
Friend or relative	<input type="checkbox"/>	<input type="checkbox"/>
Business reasons	<input type="checkbox"/>	<input type="checkbox"/>
Direct mail or email advertising	<input type="checkbox"/>	<input type="checkbox"/>
In-flight magazine	<input type="checkbox"/>	<input type="checkbox"/>
Destination travel guide	<input type="checkbox"/>	<input type="checkbox"/>
Consumer travel trade show	<input type="checkbox"/>	<input type="checkbox"/>
Radio advertising	<input type="checkbox"/>	<input type="checkbox"/>
The Internet	<input type="checkbox"/>	<input type="checkbox"/>
Travel agent/tour operator	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
NONE	<input type="checkbox"/>	X

- 14c) (IF TELEVISION TRAVEL SHOWS IN Q.14a) ASK) You mentioned "television travel shows" as a source of inspiration, which television travel shows in particular were a source of inspiration?

- 14d) (IF OTHER TELEVISION SHOWS IN Q.14a) ASK) You mentioned "other television shows" as a source of inspiration, which television shows in particular were a source of inspiration?



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

14e) (IF INTERNET IN Q. 14a) ASK) You mentioned that you use the Internet as a source of inspiration. Did you use any of the following sites?

- Word/phrase search engine (e.g., Google, Yahoo, MSN) ☐
- Websites of national tourist offices ☐
- Websites of other government tourist organizations (e.g., provincial, regional or local government tourist offices) ☐
- General travel sites such as Expedia, Travelocity or Orbitz ☐
- Traveller review site (e.g., tripadvisor.com) ☐
- Local travel agency online ☐
- Tour operators websites ☐
- Resort websites ☐
- Hotel websites ☐
- Car rental websites ☐
- Airline websites ☐
- Other private sector website(s) ☐
- Travel blogs (please specify which sites) ☐

Other sites (please specify which sites) ☐

15a) How long before your trip did you definitely decide to go on that trip to (DESTINATION IN Q.8a - (PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS)? RECORD NUMBER.

____ Days OR ____ Weeks OR ____ Months OR ____ Years
[1-365] [1-99] [1-99] [1-10]

15b) And how long before your trip to (DESTINATION IN Q.8a) did you actually book it? (PN: ANSWER IN Q15B – SHOULD BE LESS THAN OR EQUAL TO Q15A)

____ Days OR ____ Weeks OR ____ Months OR ____ Years
[1-365] [1-99] [1-99] [1-10]

- 11 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

15c) How did you book that trip? Did you: [select as many as apply]

- Contact an airline directly via their website ☐ 1
- Contact an airline directly via telephone, mail or in person ☐ 2
- Contact a hotel directly via their website ☐ 3
- Contact a hotel directly via telephone ☐ 4
- Book through a travel agent or package provider in person ☐ 5
- Book through a travel agent or package provider via phone ☐ 6
- Book through a travel agent or package provider online ☐ 7
- Book through any other online travel supplier ☐ 8
- Other ☐ 9

16. On that trip, did you travel with your immediate party only or as part of a larger group tour?

Immediate party only/self only ☐

Part of a larger group tour ☐ SKIP TO Q.18

17a) On that trip, did you buy a package that included airfare and accommodation?

Yes ☐

No ☐ SKIP TO Q.17c

17b) What else was included in the package, if anything?

- Car rental ☐
- Airport transfer ☐
- Guided tours at destination ☐
- Restaurant Meals ☐
- Entertainments ☐
- Admission to local attractions ☐
- Outdoor activities ☐
- Ground transportation between overnight destinations ☐
- Other ☐
- Nothing else included ☐

17c) (IF NO AT Q.17A OR IF CAR RENTAL NOT CHECKED IN Q.17B, ASK Q.17C. OTHERS SKIP TO Q.17D) Did you rent a car on that trip?

Yes ☐

No ☐

- 12 -



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

17d) On that trip, what percentage of each trip components did you book or purchase in advance of leaving home versus booking or arranging while on the trip?

Trip Components	Booked Before Leaving Home		Booked During Trip		Does not apply
Example:	75%	+	25%	= 100%	<input type="checkbox"/>
Airfare	_____	+	_____	= 100%	<input type="checkbox"/>
All airport transfers	_____	+	_____	= 100%	<input type="checkbox"/>
Local flights between overnight destinations	_____	+	_____	= 100%	<input type="checkbox"/>
Car rentals	_____	+	_____	= 100%	<input type="checkbox"/>
Ground transportation between overnight destinations	_____	+	_____	= 100%	<input type="checkbox"/>
Paid accommodation	_____	+	_____	= 100%	<input type="checkbox"/>
Admission to local attractions	_____	+	_____	= 100%	<input type="checkbox"/>
Admission to events (festivals, concerts, etc.)	_____	+	_____	= 100%	<input type="checkbox"/>
Guided tours at destinations	_____	+	_____	= 100%	<input type="checkbox"/>
Other activities (recreational activities, spa, etc.)	_____	+	_____	= 100%	<input type="checkbox"/>

18. In what type of accommodation did you stay? (Please check all that apply)

- ☐ Luxury city hotel
☐ Mid-priced city hotel/motel
☐ Budget city hotel
☐ Resort hotel (e.g., mountain resort, seaside resort, lakeside resort, ski resort, etc.)
☐ Bed & breakfast
☐ Guest ranch
☐ On a farm
☐ On a cruise ship
☐ Cottage/cabin
☐ Camping
☐ Caravan/Motor home
☐ Authentic wilderness lodge
☐ Home of friend or relative
☐ Other

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

19a) Which, if any, of the following activities did you participate in while on that trip to (DESTINATION IN Q. 8a - (PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS). Please check all that apply. RANDOMIZE STATEMENTS

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

	Yes	No
Seeing old architecture	<input type="checkbox"/>	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>	<input type="checkbox"/>
Visiting world heritage sites	<input type="checkbox"/>	<input type="checkbox"/>
Seeing modern architecture	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>	<input type="checkbox"/>
Visiting friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Viewing mountains	<input type="checkbox"/>	<input type="checkbox"/>
Viewing glaciers	<input type="checkbox"/>	<input type="checkbox"/>
Viewing rivers or waterfalls	<input type="checkbox"/>	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful beaches and coastlines	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>	<input type="checkbox"/>
Sport fishing	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
Helicopter skiing	<input type="checkbox"/>	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>	<input type="checkbox"/>
Taking a rail tour	<input type="checkbox"/>	<input type="checkbox"/>
Fine dining	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Visiting hot springs	<input type="checkbox"/>	<input type="checkbox"/>
Staying at a luxury resort	<input type="checkbox"/>	<input type="checkbox"/>
Taking a garden or flower tour	<input type="checkbox"/>	<input type="checkbox"/>
Observing wildlife in their natural environment	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>
Studying English	<input type="checkbox"/>	<input type="checkbox"/>
Viewing autumn leaves	<input type="checkbox"/>	<input type="checkbox"/>
Viewing aurora borealis (Northern lights)	<input type="checkbox"/>	<input type="checkbox"/>
Camping in a natural setting	<input type="checkbox"/>	<input type="checkbox"/>
Attending festivals or fairs	<input type="checkbox"/>	<input type="checkbox"/>
Attending professional sports events	<input type="checkbox"/>	<input type="checkbox"/>
Attending rodeos	<input type="checkbox"/>	<input type="checkbox"/>
Trail riding on horseback	<input type="checkbox"/>	<input type="checkbox"/>
Taking a wine/culinary tour	<input type="checkbox"/>	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>	<input type="checkbox"/>
Visiting small towns	<input type="checkbox"/>	<input type="checkbox"/>
Visiting casinos	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
Taking city tours	<input type="checkbox"/>	<input type="checkbox"/>
Taking nature tours	<input type="checkbox"/>	<input type="checkbox"/>



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

19b) What was the total cost of that trip in Euros to (DESTINATION IN Q. 8a - PN: SHOW MULTIPLE DESTINATIONS. NO LIMITS), for you and your immediate travel party, including airfare and all other costs? [ACCEPT ONE ANSWER ONLY]

- ☐ Under €1,000
☐ €1,000 - €1,999
☐ €2,000 - €3,999
☐ €4,000 - €5,999
☐ €6,000 - €7,999
☐ €8,000 - €9,999
☐ €10,000 - €14,999
☐ €15,000+

19c) Overall, how would you rate that trip on value for money. Would you say it was:

- ☐ Excellent value for money
☐ Very good value for money
☐ Good value for money
☐ Fair value for money
☐ Poor value for money

19d) How likely are you to recommend that destination to others?

- ☐ Definitely will recommend to others
☐ Very likely
☐ Somewhat likely
☐ Not very likely
☐ Not at all likely
☐ Definitely will not recommend to others

[PN: IF CANADA IS NOT MENTIONED IN Q.8A BUT IS MENTIONED IN Q.7, ASK Q.8A TO 19D FOR LAST TRIP TO CANADA. REPLACE Q.8A WITH: "You mentioned that you travelled to Canada in the past 3 years. Thinking about your last trip to Canada, which of these places did you visit on that trip? Please check Canada as well."]

PN: THE MAXIMUM TIMES THE RESPONDENT IS ASKED IS TWO TIMES. IF TWICE, ONCE REGARDING MOST RECENT TRIP, THE OTHER TIME REGARDING THE TRIP TO CANADA (PN: PLEASE LABEL THEM AS Q.8A-1 TO Q.19D-1)

FORCING ANSWER CANADA IN Q.8A-1 IF Q7 HAS CANADA (LAST TRIP TO CANADA SECTION)

- 16 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

ASK EVERYONE

20. Please imagine that you are taking an overseas pleasure trip beyond the European Union countries, North Africa and the Mediterranean for 3 nights or longer with at least one night in paid accommodation. For each statement on this page check one box to show how important that reason is to you when considering such a trip.

	Very Important	Somewhat Important	Not very Important	Not at all Important
Getting away/escaping from the demands of home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a clean, healthy environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying a relaxing atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coming home with exciting travel stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a place my friends would love to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surrounded by beautiful, unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing as much as possible in the time available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing first hand what I learned in school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a modern culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing aboriginal culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roughing it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in active outdoor sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying alpine (downhill) skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying in accommodation unique to that country (e.g. guest ranch, lodge, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in one area to experience how local people live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling in a group tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling secure and safe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a wide, spacious outdoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a different country's healthy lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in the home of a resident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a local supermarket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to try different cuisines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting and interacting with local people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying the convenience of the modern world while experiencing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a wide selection of activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bringing the family together	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing an exciting environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying at luxury surroundings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting historical attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 17 -



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

21. Now, for each statement below please check which of these travel destinations each statement applies to extremely well. You can check as many destinations as you like as long as it applies extremely well. You can base your choices on your impressions, experiences, or anything else that you have seen, heard or read.

RANDOMIZE ORDER OF DESTINATION LIST

	United States	Canada	Australia	East Asia	South Asia	Not Applicable
Getting away/escaping from the demands of home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a clean, healthy environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying a relaxing atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coming home with exciting travel stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a place my friends would love to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surrounded by beautiful, unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing as much as possible in the time available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing first hand what I learned in school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a modern culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing aboriginal culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roughing it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing unspoiled nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeing wildlife in nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in active outdoor sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying alpine (downhill) skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying in accommodation unique to that country (e.g. guest ranch, lodge, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in one area to experience how local people live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling in a group tour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling secure and safe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a wide, spacious outdoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing a different country's healthy lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time in the home of a resident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a local supermarket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to try different cuisines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting and interacting with local people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoying the convenience of the modern world while experiencing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a wide selection of activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bringing the family together	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing an exciting environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunbathing or other beach activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staying at luxury surroundings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting historical attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 18 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

- 22) How interested are you in visiting United States, Canada, Australia or South East Asia (ROTATE DESTINATION) in the next two years? (Please select one only)

	United States	Canada	Australia	South East Asia
Very Interested	<input type="checkbox"/> 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat Interested	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Very Interested	<input type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all Interested	<input type="checkbox"/> 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(PN: PROGRAMMING: FOR NEXT QUESTION SHOW COUNTRIES WITH CODES 4 OR 3.)

- 23) How likely are you to visit (SHOW COUNTRIES WITH CODES 4 OR 3 IN Q.22. ROTATE DESTINATION) in the next twelve months? (Please select one only)

	United States	Canada	Australia	South East Asia
Definitely Will Visit	<input type="checkbox"/> 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Likely	<input type="checkbox"/> 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat Likely	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Very Likely	<input type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all Likely	<input type="checkbox"/> 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely Will Not Visit	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 24a) (IF CODES 2 OR 1 FOR CANADA IN Q. 22 ASK) Is Canada a country that you would like to visit some day, even if it is not in the next 2 years?

Yes ☐
No ☐ SKIP TO Q.26

- 24b) (IF CODES 4 OR 3 FOR CANADA IN Q. 22 OR 'YES' IN Q.24A ASK) Thinking about a future pleasure trip to Canada, please check the one box which best describes how far along you are in planning/booking that trip.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Still just dreaming about it	Seriously considering a trip to Canada in the next 2 years	Have started to gather information about Canada from friends, the internet, articles or brochures	Currently planning the details of my itinerary for a trip to Canada	In the process of working out the details of flight and land arrangements while in Canada	Already booked my flight

- 19 -



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

25) Thinking about your next trip to Canada, if you were to go, describe your ideal trip below:

Season		
January – March	<input type="checkbox"/>	1
April – June	<input type="checkbox"/>	2
July – September	<input type="checkbox"/>	3
October – December	<input type="checkbox"/>	4
Type of tour		
Group tour	<input type="checkbox"/>	1
Non-group (immediate party only)	<input type="checkbox"/>	2
(IF GROUP TOUR) Would you prefer:		
All days organized with the group, or	<input type="checkbox"/>	1
Many free days on your own	<input type="checkbox"/>	2
(IF NON-GROUP) Would you:		
Buy air, accommodation, etc. as part of a package, or	<input type="checkbox"/>	1
Buy air, accommodation, and other components separately	<input type="checkbox"/>	2
Would Also Visit Overnight or Longer (ALLOW MORE THAN ONE ANSWER)		
U.S.A.	<input type="checkbox"/>	
Other countries	<input type="checkbox"/>	
Canada only	<input type="checkbox"/>	
Provinces likely to visit (Please check all that apply)		
British Columbia (includes Vancouver, Victoria and Whistler)	<input type="checkbox"/>	1
Alberta (includes Calgary, Edmonton, Banff, and Jasper)	<input type="checkbox"/>	2
Saskatchewan (province)	<input type="checkbox"/>	3
Manitoba (province)	<input type="checkbox"/>	4
Ontario (includes Ottawa, Toronto and Niagara Falls)	<input type="checkbox"/>	5
Quebec (includes Montreal and Quebec City)	<input type="checkbox"/>	6
Nova Scotia (Atlantic Canada)	<input type="checkbox"/>	7
New Brunswick (Atlantic Canada)	<input type="checkbox"/>	8
Prince Edward Island (Atlantic Canada)	<input type="checkbox"/>	9
Newfoundland and Labrador (Atlantic Canada)	<input type="checkbox"/>	10
Yukon Territory (Northern Canada)	<input type="checkbox"/>	11
Northwest Territories (Northern Canada)	<input type="checkbox"/>	12
Nunavut (Northern Canada)	<input type="checkbox"/>	13
Preferred type of accommodation for one or more nights on trip (MAXIMUM 3):		
Mountain resort	<input type="checkbox"/>	
Seaside resort	<input type="checkbox"/>	
Lakeside resort	<input type="checkbox"/>	
Ski resort	<input type="checkbox"/>	
City hotel	<input type="checkbox"/>	
On a farm	<input type="checkbox"/>	
On a ranch	<input type="checkbox"/>	
B&B (bed & breakfast)	<input type="checkbox"/>	
Coastal cruise ship	<input type="checkbox"/>	
Canadian spa	<input type="checkbox"/>	
Authentic wilderness cabin or lodge	<input type="checkbox"/>	
Camping	<input type="checkbox"/>	
Caravan/motor home	<input type="checkbox"/>	
Home of friend or relative	<input type="checkbox"/>	
Participate in any of the following activities (RANDOMIZE)	Yes	No
Downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
Snowmobiling	<input type="checkbox"/>	<input type="checkbox"/>
Helicat skiing	<input type="checkbox"/>	<input type="checkbox"/>
Dog-sledding	<input type="checkbox"/>	<input type="checkbox"/>
Trekking in a nature area	<input type="checkbox"/>	<input type="checkbox"/>
Sports fishing	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Trail riding on horseback	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking/boating	<input type="checkbox"/>	<input type="checkbox"/>
Getting to know the local inhabitants	<input type="checkbox"/>	<input type="checkbox"/>
Attending theatres, clubs or shows	<input type="checkbox"/>	<input type="checkbox"/>
Visiting museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>
Visiting places of historical interest	<input type="checkbox"/>	<input type="checkbox"/>
Seeing modern architecture	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing French Canadian culture and cuisine	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal cultural experiences, celebrations, and attractions	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Taking a garden or flower tour	<input type="checkbox"/>	<input type="checkbox"/>
Observing wildlife in their natural environment	<input type="checkbox"/>	<input type="checkbox"/>
Viewing mountains	<input type="checkbox"/>	<input type="checkbox"/>
Viewing rivers or waterfalls	<input type="checkbox"/>	<input type="checkbox"/>
Visiting wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Viewing autumn leaves	<input type="checkbox"/>	<input type="checkbox"/>
Viewing aurora borealis (Northern lights)	<input type="checkbox"/>	<input type="checkbox"/>
Taking a wine/culinary tour	<input type="checkbox"/>	<input type="checkbox"/>
Taking a cruise	<input type="checkbox"/>	<input type="checkbox"/>

- 20 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

Taking a rail tour	<input type="checkbox"/>	<input type="checkbox"/>
Visiting small towns	<input type="checkbox"/>	<input type="checkbox"/>
Visiting friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>
Attending festivals or fairs	<input type="checkbox"/>	<input type="checkbox"/>
Attending rodeos	<input type="checkbox"/>	<input type="checkbox"/>
Seeing beautiful beaches and coastlines	<input type="checkbox"/>	<input type="checkbox"/>
Seeing old architecture	<input type="checkbox"/>	<input type="checkbox"/>
Visiting world heritage sites	<input type="checkbox"/>	<input type="checkbox"/>
Visiting casinos	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
Taking city tours	<input type="checkbox"/>	<input type="checkbox"/>
Taking nature tours	<input type="checkbox"/>	<input type="checkbox"/>
Study English	<input type="checkbox"/>	<input type="checkbox"/>
Other activities (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
Travel in Canada between centres by any of the following:		
Air	<input type="checkbox"/>	<input type="checkbox"/>
Rental car	<input type="checkbox"/>	<input type="checkbox"/>
Motor coach	<input type="checkbox"/>	<input type="checkbox"/>
Motor home/camper	<input type="checkbox"/>	<input type="checkbox"/>
Rail	<input type="checkbox"/>	<input type="checkbox"/>
Private car	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
Duration in Canada		
_____ nights [1 to 999]		

(IF CODES 5, 4 OR 3 FOR CANADA IN Q. 23 SKIP TO Q.27A)

26. Some people are very interested in visiting Canada, yet have decided to put the trip off to a later year. From your personal point of view, how important are each of the following factors, if at all, in preventing you from travelling to Canada in the next 12 months. [RANDOMIZE WITHIN EACH HEADING]

	Extremely Important	Very Important	Fairly Important	Not Very Important	Not at all Important
Insufficient information or knowledge about:					
• Where to go in Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• What there is to do besides seeing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Types of accommodation available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Cultural activities available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Nightlife and entertainment options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Restaurants, bars and clubs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• What deals are available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Where to get information on the internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concerns about:					
• The weather	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Not being able to speak the language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Safety in Canadian nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Country too vast for a one or two week holiday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• The cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Lack of convenient flight to Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Distance between accommodation and nature based activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Greenhouse gas emissions due to air travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 21 -

Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

ASK EVERYONE

27a) To what extent do you agree or disagree with the following statement?
It is very important to me that I take action on a daily basis to reduce my impact on the environment by adopting environmentally-friendly measures such as recycling, conserving water.

- Strongly agree ☐
Agree ☐
Neutral ☐
Disagree ☐
Strongly disagree ☐

27b) Thinking about the environment, some countries are making considerable effort to be more environmentally responsible, while other countries are much slower to react. When choosing a travel destination, how important to you is a destination's record on the treatment of its environment? Would you say it is:

- Extremely important, ☐
Very important, ☐
Fairly important, ☐
Not very important, or ☐
Not at all important? ☐

27c) How would you rate the following countries as an environmentally responsible destination? Using a scale of 1 to 10 where "10" means extremely good and "1" means extremely poor, or any number in between. (ROTATE COUNTRIES)

	Extremely Good	9	8	7	6	5	4	3	2	1	Extremely Poor	Dc
United States	10	9	8	7	6	5	4	3	2	1		C
Canada	10	9	8	7	6	5	4	3	2	1		C
Australia	10	9	8	7	6	5	4	3	2	1		C
China	10	9	8	7	6	5	4	3	2	1		C
France	10	9	8	7	6	5	4	3	2	1		C

(PN: PROGRAMMING: ASK ALL RESPONDENTS)

DEMOGRAPHICS:

(PN: INTRO:) So that we can tabulate your responses, we would like to ask you some questions that would be used for statistical purposes only.

28) Do you have any close friends or relatives living in Canada at the present time? (Please select one)

- Yes.....☐
No.....☐
Don't know.....☐

29) Including yourself, how many people are there in your household? (Please select one)

- 1 person.....1
2-3 people.....2
4-5 people.....3
6 or more people.....4

(PN: PROGRAMMING: IF CODE 1 SKIP TO Q.31)

- 22 -

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

30) How many are less than 18 years of age? (Please select one)

- 1 person.....1
2 people.....2
3 people.....3
4 people.....4
5 people.....5
6 or more people.....6
None.....7

31) What is your marital status? (Please select one)

- Married or living with someone.....☐
Single.....☐
Divorced / separated.....☐
Widow / widower.....☐
Prefer not to answer.....☐

32) Which of the following categories best describes your occupation? (Please select one)

- Student.....1
Semi or unskilled manual worker (e.g., manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant).....2
Skilled manual worker (e.g., skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, AA patrolman, pub/bar worker, etc.).....3
Supervisory or clerical / junior managerial / professional / administrative (e.g., office worker, student doctor, foreman with 25+ employees, salesperson, etc.).....4
Intermediate managerial / professional / administrative (e.g., newly qualified (under 3 years) doctor, solicitor, board director in small organization, middle manager in large organization, principle officer in civil service/ local government).....5
Higher managerial / professional / administrative (e.g., established doctor, solicitor, board director in a large organization (200+ employees), top level civil servant/public service employee).....6
Self-employed.....7
Employed part-time.....8
Housewife/husband.....9
Unemployed.....10
Retired / semi-retired.....11
Other.....12
Prefer not to answer.....99

33) What is the highest level of education that you have completed? Please choose one answer that applies.

- Less than secondary school.....☐
Lower secondary school (collèges).....☐
Higher secondary school (lycées).....☐
Higher education.....☐
University.....☐
Graduate school.....☐
Prefer not to answer.....☐

- 23 -



Questionnaire

Insignia Marketing Research Inc.

October 10, 2007
T703-07 FINAL

34). Which of the following categories best describes your gross monthly household income before taxes in 2006? Please include all wages, salaries, pensions and income from other sources. Please choose one answer that applies.

- | | |
|----------------------|--------------------------|
| Less than €1,200 | <input type="checkbox"/> |
| €1,200 - €1,499 | <input type="checkbox"/> |
| €1,500 - €2,299 | <input type="checkbox"/> |
| €2,300 - €2,799 | <input type="checkbox"/> |
| €2,800 - €3,299 | <input type="checkbox"/> |
| €3,300 - €3,799 | <input type="checkbox"/> |
| €3,800 - €4,299 | <input type="checkbox"/> |
| €4,300 or more | <input type="checkbox"/> |
| Prefer not to answer | <input type="checkbox"/> |

THANK YOU

Travel Trade Interview Guide

France
July, 2007
T703-07

French Travel Trade Interview

Organization: _____
Type: Retail [] Wholesale [] Both Retail/Wholesale [] Airline []
Name: _____
Title/Position: _____
Proportion of Long Haul to Short Haul Business: _____

Current Perceived Trends in the French Travel Market

Objective: This section is designed as a general overview to gather the travel trade's opinion and impressions of changes in the following:

- Destinations
- Travel retailing.

- 1) Thinking over the past few years, what **trends or changes** have you seen in the long-haul travel market in terms of **destinations**? For example, are some countries becoming more popular and are some becoming less? If so, which ones? (Assess trends with Canada.)

- 2) Have consumer needs changed in any way? PROBE ON MORE EXPERIENTIAL TRIPS, INTERESTS OR ACTIVITIES, PLANNING/BOOKING LEAD TIMES, PARTY COMPOSITION, ETC

- 3) Has how consumers book vacations changed in anyway? Are they using the Internet more or less, going through different channels or organizations? What kind of services do they use? In general, are they behaving differently?

France
July, 2007
T703-07

- 4) Have the products or packages available changed over the past few years—including the kinds of experiences travelers are seeking, duration, etc? If so, in what way?

- 5) Has advertising and/or promotion to the consumer changed at all over the past few years? Is there more or less? Is it different, is it emphasizing different aspects like price, flights, or itineraries? What effect has this had on the consumer/your business?

- 6) Five years from now, what other consumer or industry changes can we expect to see? (ASSESS IF THESE CHANGES ARE LONG TERM OR SHORT TERM)

Canada's Image vs. Competitors

Objective: this section is to understand the trade's perceived competition set for Canada and its image.

- 7) Who are Canada's main competitors among other long-haul destinations? Why? (ONCE THE RESPONDENT HAS HAD A CHANCE TO GIVE THEIR OPINION THEN PROBE SPECIFICALLY ON THE FOLLOWING COUNTRIES: EUROPE GENERAL, UNITED STATES, CHINA, ASIA, MIDDLE EAST, AUSTRALIA/NEW ZEALAND).

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2

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1



Travel Trade Interview Guide

France
July, 2007
T703-07

- 8) In your opinion, are these a different set of competitors from a few years ago or the same? If different, why? (AGAIN DRILL DOWN ON ABOVE MENTIONED COUNTRIES)

- 9) What are Canada's **strengths/advantages** over competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC AND ATTACHED TO THE COMPETING COUNTRY)

- 10) What are Canada's **weaknesses/disadvantages** compared to competitive destinations? Has this changed over the past few years, if so, in what way? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC TO THE COMPETING COUNTRY)

- 11) What kind of Brand Image do you think Canada **should have** as a pleasure destination? What aspects should it promote about itself?

France
July, 2007
T703-07

- 12) What are your current attitudes towards U.S. travel and its products? Have they changed over the past few years? Are they likely to change in the near future? (ASSESS IN WHAT WAY THESE PERCEPTIONS ARE RUBBING OFF ON CANADA IN EITHER A POSITIVE OR NEGATIVE WAY)

Travel Products

The objective of this section is to gather impressions that the trade has about travel products.

- 13) On what basis do French people choose their vacation products or packages? What is the relative importance of price, itinerary, accommodations, destination appeal, convenience, availability of flights, good food, safety, shopping opportunities, reputation, etc.? Can you rank or prioritize those for me? (PROBE SPECIFICALLY IF ANY CHANGES HERE HAVE AFFECTED TRAVEL TO CANADA) Have there been any changes?

- 14) Why do French people travel to Canada? What are the main reasons? What do they want to see? Activities of interest? (PROBE SPECIFICALLY FOR VACATION TRAVEL)



Travel Trade Interview Guide

France
July, 2007
T703-07

- 15) What are the most desired or popular travel products or packages for Canada that French people are buying? In other words, what are they asking for? Detail independent vs. group tour, duration of trip, places visited, main activities. Obtain wholesale/agent brochures and mark on them the most popular products. (ASSESS IF THEY ARE STILL CONSIDERED TO BE CURRENT AND ATTRACTIVE OR HAVE THEY BECOME LESS RELEVANT AND ATTRACTIVE)
- 16) To what degree do you encourage travel to all or any of the regions in Canada? (PROBE BRITISH COLUMBIA, ALBERTA, NORTHERN TERRITORIES, PRAIRIES, ONTARIO, QUEBEC, ATLANTIC CANADA)

- 17) How is the profile of your Canada destined clients different from those destined to other long-haul destinations, if at all? (LOOK FOR DEMOGRAPHIC DIFFERENCE – e.g. AGE, INCOME, EDUCATION, FAMILY STATUS, ETC. PROBE FOR CHANGES IN ANY OF THE TARGETS)

France
July, 2007
T703-07

New Product Ideas

- 18) What kinds of vacations should Canada now be offering to attract either existing or new targets. (Details independent vs. group tour, duration, places visited, main activities.) (MAKE SURE THE FEEDBACK IS SPECIFIC, THIS IS A VERY IMPORTANT QUESTION.)

- 19) What travel packages or products are available to other destinations that would be ideal for Canada? Can we get an idea for new packages for Canada from them? (Detail destinations and relevant package details. Obtain brochures where possible and mark the key vacation product opportunities.) (MAKE SURE THE FEEDBACK IS VERY SPECIFIC)

Travel Barriers

Objective: To uncover the trade's perceptions of barriers and weaknesses in selling Canada.

- 20) What are the major barriers or weaknesses holding people back from vacationing in Canada? (Obtain details, probe why and how to resolve.) (For example, if airline capacity is an issue, determine details on desired frequency, timing, and to what cities.) What complaints have you heard from clients? Barriers could include airline capacity, pricing, lack of knowledge, lack of packages, destinations choice issues, activity issues, accommodation issues, loss of "wow" factor.)



Travel Trade Interview Guide

France
July, 2007
T703-07

France
July, 2007
T703-07

- 21) What specific problems have you experienced in selling Canada? Can you provide suggestions on anything Canada can do to overcome these weaknesses or barriers?

- 24) Specifically
i Assistance for the trade (RECORD DETAILS)

- 22) General interest in Canada as a dream vacation is very high – often at the top of the list. Yet, the number of travellers actually going to Canada is relatively small. Why is that? What is holding people back? What are they afraid of?

- ii Product development? (RECORD DETAILS)

Trade Support

Objective: to understand the areas where the trade needs additional or more support in selling Canada.

- iii What key marketing messages/themes would you suggest to sell Canada to potential travelers from France? (RECORD DETAILS)

- 23) What can Canadian travel industry do to improve its marketing in France? (MAKE SURE THE FEEDBACK IS VERY SPECIFIC. PROBE DEEPLY)

- 25) What would be your top 3 recommendations for the Canadian tourism industry to increase tourism from France?



Travel Trade Interview Guide

*France
July, 2007
T703-07*

- 26) How much contact do you have with Canadian officials regarding increasing travel to Canada? What is the nature of this contact? What do you think they could do to help raise holiday travel? What could they do to help you raise holiday travel to Canada?

- 27) Do you have any comments on the Canadian Tourism Commission? Please be honest in your comments. Your concerns, suggested improvements, or complaints would be very valuable to us.

i Any complaints?

ii What is it doing right?

iii Ways it could improve its service to you?

- iv Do you receive office e-mail correspondence from the Canadian Tourist office? Is it effective? How could it be improved?

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9

*France
July, 2007
T703-07*

- 28) Are the brochures they provide to trade effective? Can you show me any outstanding brochures for other countries that are really effective? (ATTEMPT TO OBTAIN A COPY)

- 29) Do you have any other comments or questions?

THANK YOU

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10



European Discussion Guide – Prospective Visitors



T703-07
July, 2007

European Discussion Guide Prospective Visitors

1. Background and Introduction (10 min)

In this section we will be warming up the participants, letting them get to know each other and learn about any specific hobbies, interests or clubs they belong to. It is important to understand their "spare time" activities and interests so that we can get some learning for potential "niche" travel packages.

- Please refer to the introductory sheet attached.
- Explain room set-up, confidentiality, explain expressing their own opinions, explain roles and objectives.
- Establish respondents as authorities.

Background on Respondents

- Have participants introduce themselves.
 - Name.
 - Type of work, if they work outside of the home.
 - Hobbies and interests or clubs that you belong to (for example: cooking, skiing, general outdoor activities, gardening, art, etc.).
 - Do you pick travel destinations based on any of your interests?
 - If so, what have you done, where have you gone?

T703-07
July, 2007

Moderator Instruction:

Have up on the wall several sheets of paper from an easel. Keep past trips separate from future trips.

Ask each participant to go through their list, **past trips first** and then **planned trip/s**:

Ask for:

- Destination
- Time of year, and
- Purpose
- Special interests or hobby involved
- Assess from the group if it is generally a high, medium or low interest destination
- Probe/observe if Canada is combined with other countries—like U.S.

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

Stand back and look at the easel papers and have the group help determine if any particular travel patterns exist (for example: seasonal vacations, VFR, in-country vs. out of country, etc.).

- I would like you to take a look at these sheets of travel logs we have created and tell me if you can identify or see any kinds of patterns. (For example: certain types of travel depending on the year or, certain places that are popular depending on the time of year, etc.).
- Determine if:
 - Some patterns exist and why.
 - Some destinations are becoming more or less popular and why.
 - Interests in travel are changing, in other words peoples' interests in the type of holiday/vacation they take have changed (example: more sun or mini breaks).
 - New types of packages or offerings have emerged.

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2



European Discussion Guide – Prospective Visitors

2. Buy Cycle / Behaviour Analysis (25 min)

T703-07
July, 2007

Moderator: Write the Buy Cycle Model on the board/ sheets for discussion.

- Here are the steps that many people tell us they go through when planning a trip overseas. REVIEW WITH GROUP
- Do you agree with this as a general model? Shall we modify it in some way? MODIFY AS APPROPRIATE

TRAVEL PLANNING BUY CYCLE

Step 1--AWARE: You first hear about the destination.

Step 2--ON DREAM LIST: It becomes a destination that you dream about going to some day in the future, not necessarily in the immediate future.

Step 3--ON CONSIDER LIST FOR NEAR FUTURE: Now you are thinking about going there in the next year or two. Something made you want to go there very soon.

Step 4--CHECK OUT TRIP VIABILITY: You start to gather information on the basic parameters—is it doable, is it affordable, how much time do I need, how long is the flight, will the trip be enjoyable?

Step 5--CREATING A "VACATION MOVIE" IN YOUR HEAD: This is where you really start your serious investigation. Trying to get an idea of specifically what you would be doing during the day, in the evening, whether there will be enough to do, reassuring yourself that this will be a truly memorable experience.

Step 6--PUTTING TOGETHER THE FINAL VACATION: This involves choosing the right package, or working out the details of flights and land arrangements at the destination.

Step 7--BUYING THE TICKET OR PACKAGE: This is the final planning step—committing to the trip.

Buy Cycle For Competitive Destination

- Now, let's talk about your one of your recent trips overseas (Moderator—for each respondent, pick one of Canada's key competitors, not Canada itself)
- For **each** step:
 - What actually happened to get you to that stage?
 - What/who were the influencers (e.g. media, friends, etc)?
 - What sources of information did you use?

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3

T703-07
July, 2007

- For example, how did the destination get on your **dream list** as a place to visit sometime in the future?
 - What were the main influences—something you saw on television (what specifically)? A friend's advise (what did they say specifically)? Something you read?
- What made you feel comfortable enough to go on to the next stage?
 - What had you learned about the destination that motivated you to want to go to the next stage?
 - What was really appealing to you at this point?
 - What feelings or emotions did you have?
- Moderator—capture very specific detail on influencers, source of information, destination appeals and feelings at each step**
- Summarize** what the key influencers, sources of information, appeals and feelings at each step to move the traveler through the decision process.
- What are the most important media to promote a destination at each stage?

3. Buy Cycle For Canada

- Let's talk about Canada on the same Buy Cycle Model.
- Where are you now personally—at what step?
- What got you to that point? Probe all the influencers.
 - What sources of information got you there (probe or each step up to that point)?
 - What did you learn from that information about Canada that got you there?
- Why have you not moved farther?
 - Where are the bottlenecks?
 - What are the barriers?
 - What are your concerns? Your fears?
 - What information is missing that would allow you to move on?
 - What emotions are missing to make you want to go now?

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4



European Discussion Guide – Prospective Visitors

T703-07
July, 2007

4. Explore Free Association (In-Depth) Outbound Trips (15 min)

- I would like to do an interesting exercise with you on two destinations:
 - Canada
 - Other competing destination
- It is a type of free association, it is a way for us to write down as many thoughts, feelings, and associations with a particular destination. Here is an example that has been generated ahead of time. (Go through the example quickly to show how one association can branch off in a variety of ways, show how the mindmap captures thoughts as well as feelings, how both positives and negatives can emerge, and how symbols or drawings can be used instead of words).
- Work with the group to get mind mapping thoughts on an easel or board.
- Review branches for Canada first (listen for patterns/repeats).
- What is the one branch that stands out for you?
 - Understand:
 - Importance
 - Significance
 - Meaning
 - Discuss countries strengths and weaknesses and overall image.

REPEAT FOR OTHER COMPETING COUNTRIES

5. Canada's Current Image (15 min)

The main objective is to understand current perceptions of Canada—strengths and barriers

- Let's talk more specifically about the appeals of Canada.
 - What would be the main reasons to go?
 - What does Canada offer that appeals to people like yourself?
 - How do you see a typical day on a Canadian vacation?
 - What specific activities would you like to participate in?
 - What specific things would you like to see?
- Now let's talk about the negative side.
 - What is holding you back?

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5

T703-07
July, 2007

- Why do so many people have Canada on their dream trip list, but never get around to going?
- What are all the possible reasons for holding back/putting the decision off?
- Would there be enough to do? Enough to see?
- Or is it the stronger appeal of other destinations?
- If so, what does Canada lack that they have?

6. Picture Sort (10 min)

I have several pictures of Canada that I would like to have you sort into 3 groups: **extremely motivating** to want to go to Canada; **moderately motivating**; **not very motivating**.

- Go through the extremely motivating pictures and gather reasons why they are motivating:
 - What is catching your attention here?
 - What is getting you excited/interested?
 - Is this similar to what motivates you to go on a long-haul trip?
 - How is this different from (key competing countries)?
- Go through a few of the less motivating pictures and understand what is missing.
 - Why do these not motivate as much?

7. Creating The Ideal Trip (15 min)

- I have some brochures on vacationing in Canada.
- I'd like each of you to work with this material and create an ideal vacation experience.
- Use the pictures that we previously looked at and the brochures as references and write down the details for your ideal trip on the paper provided
 - We need to know specifically where in Canada you would travel
 - In what season
 - For how long you would be away
 - What activities you would do in each place—whether active or simply sightseeing
 - Whether you would want to be involved in any hobbies or special interests you have personally
 - What you expect to be the most memorable highlights of the trip—especially stories that you would tell when you return home

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6



European Discussion Guide – Prospective Visitors

T703-07
July, 2007

- Summarize:
 - What types of trips are most appealing?
 - Have your impressions of a vacation in Canada changed in any way after reviewing this material? In what way and why?
- Do these brochures address the kinds of vacations you are looking for?
 - Do they provide the kind of information needed to entice you?
 - Is there enough detail and imagery for you to create that "movie" in your head?
 - In what way are they inadequate?
 - What do they need to focus on to appeal to more people?
- Now that you have been through this detailed information, describe that your personal "movie" about a trip to Canada—what you visualize, where, how you are feeling.

8. 2010 Olympics **(5 min)**

- The 2010 Olympics are to be held in Vancouver, British Columbia
- Were you aware of that?
- Any interest in attending?
- Will you be watching the Olympics on television?
- How do you expect the Olympics to change or enhance people's image of Canada?



European Discussion Guide – Recent Visitors



T703-07
July, 2007

European Discussion Guide Recent Visitors

1. Background and Introduction (10 min)

In this section we will be warming up the participants, letting them get to know each other and learn about any specific hobbies, interests or clubs they belong to. It is important to understand their "spare time" activities and interests so that we can get some learning for potential "niche" travel packages.

- Please refer to the introductory sheet attached.
- Explain room set-up, confidentiality, explain expressing their own opinions, explain roles and objectives.
- Establish respondents as authorities.

Background on Respondents

- Have participants introduce themselves.
 - Name.
 - Type of work, if they work outside of the home.
 - Hobbies and interests or clubs that you belong to (for example: cooking, skiing, general outdoor activities, gardening, art, etc.).
 - Do you pick travel destinations based on any of your interests?
 - If so, what have you done, where have you gone?

Moderator Instruction:

Have up on the wall several sheets of paper from an easel. Keep past trips separate from future trips.

Ask each participant to go through their list, **past trips first** and then **planned trip/s**:

Ask for:

- Destination
- Time of year, and
- Purpose
- Special interests or hobby involved
- Assess from the group if it is generally a high, medium or low interest destination
- Probe/observe if Canada is combined with other countries—like U.S.

REPEAT FOR EACH PARTICIPANT

Moderator Instruction:

Stand back and look at the easel papers and have the group help determine if any particular travel patterns exist (for example: seasonal vacations, VFR, in-country vs. out of country, etc.).

- I would like you to take a look at these sheets of travel logs we have created and tell me if you can identify or see any kinds of patterns. (For example: certain types of travel depending on the year or, certain places that are popular depending on the time of year, etc.).
- Determine if:
 - Some patterns exist and why.
 - Some destinations are becoming more or less popular and why.
 - Interests in travel are changing, in other words peoples' interests in the type of holiday/vacation they take have changed (example: more sun or mini breaks).
- New types of packages or offerings have emerged.

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2

T703-07
July, 2007



European Discussion Guide – Recent Visitors

T703-07
July, 2007

2. Story Telling (15 min)

- Can you read us the stories that you wrote out in advance of the group about your trip to Canada?
- Are there any common activities or feelings here among all these stories?

3. Buy Cycle/ Behaviour Analysis (25 min)

Moderator: Write the Buy Cycle Model on the board/ sheets for discussion.

- Here are the steps that many people tell us they go through when planning a trip overseas. REVIEW WITH GROUP
- Do you agree with this as a general model? Shall we modify it in some way? MODIFY AS APPROPRIATE

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T703-07
July, 2007

Buy Cycle For Canada

- Now, let's talk about your recent trip to Canada
- For each step:
 - What actually happened to get you to that stage?
 - What/who were the influencers (e.g. media, friends, etc)?
 - What sources of information did you use?
- For example, how did the destination get on your **dream list** as a place to visit sometime in the future?
 - What were the main influences—something you saw on television (what specifically)? A friend's advise (what did they say specifically)? Something you read?
- What made you feel comfortable enough to go on to the next stage?
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Buy Cycle For Competitive Destination Trip

- Now, let's talk about your one of your recent trips to another long haul destination
- REPEAT ABOVE FOR RECENT TRIP. TRY TO COVER A RANGE OF COMPETITIVE DESTINATIONS

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4



European Discussion Guide – Recent Visitors

T703-07
July, 2007

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T703-07
July, 2007

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6

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5



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T703-07
July, 2007

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Recruiting Specs

703-07
July 23, 2007

703-07
July 23, 2007

Paris Focus Groups Recruiting Specifications

- There are two different focus group traveller **types** being recruited for this study.

- Type 1** **Past 3 year long-haul traveller, or planning to travel long-haul within the next 2 years, have never been on a vacation to Canada.**
- This person has either travelled for pleasure purposes outside of Europe, the Mediterranean and North Africa over the past 3 years or is planning to in the next 2 years.
 - They have not yet traveled to Canada.
 - Are not rejecters of Canada.

- Type 2** **Past 3 years traveller to Canada**
- Have visited Canada on a pleasure trip in the past 3 years.

- Below is the grid for the 6 groups.

Group 1	
Type:	2
Gender:	Male/Female
Age:	50-69
Group 2	
Type:	2
Gender:	Male/Female
Age:	30-49
Group 3	
Type:	1
Gender:	Female
Age:	30-49
Group 4	
Type:	1
Gender:	Male
Age:	30-49
Group 5	
Type:	1
Gender:	Male
Age:	50-69
Group 6	
Type:	1
Gender:	Female
Age:	50-69



Recruiting Specs

703-07
July 23, 2007

703-07
July 23, 2007

Common Specs – Type 1

- All must be born in France or have lived in France for the past 5 years.
- Currently employed full time and above national average income earners. (FOR GROUPS WITH AGED 50-69, MAXIMUM HALF PER GROUP CAN BE RETIRED)
- **All have travelled outside of Europe, the Mediterranean and North Africa on a pleasure trip during the past 3 years for 4 nights or longer, or are seriously planning to do so within the next 2 years.**
 - Gather a mix of destinations that include the U.S., Australia/New Zealand, Asia, etc.
- All must be very interested in visiting Canada in the next 3 years—via:
 - **An open-ended question:** ask respondents what destinations are they likely to visit on a pleasure trip outside of France in the next 3 years.
 - Canada must be mentioned voluntarily as a destination they are very likely to visit on a pleasure trip
 - **Ask if trip to Canada would be mainly to visit friends or relatives.** If so, limit to maximum 3 per group.
- **None** have actually taken a pleasure trip to Canada in the past.
- All must be the key decision makers within the household in choosing foreign pleasure destinations or share the responsibility equally with their partner.
- All must be personally involved with booking pleasure trips.
- Recruit 8 for 6 to show.

3

Common Specs – Type 2

- All must be born in France or have lived in France for the past 5 years.
- Currently employed full time (females can be part time or homemakers). (FOR GROUPS WITH AGED 50-69, MAXIMUM HALF PER GROUP CAN BE RETIRED)
- Household income must be above national average.
- **Have travelled to Canada within the past 3 years for 4 nights or longer for a pleasure trip.**
- **Primary motivator of at least one of those trip(s) to Canada was pleasure, not just to visit friends or relatives.**
- All must be the key decision makers within the household in choosing foreign pleasure destinations or share the responsibility equally with their partner.
- All must be personally involved with booking pleasure trips.
- Recruit 8 for 6 to show.

4



European Forums

October 1, 2007, 2007
T703-07

European Forums

A. Past Visitors

<u>Day 1</u>	<u>Mine Knowledge</u> <ul style="list-style-type: none"> ♦ Provide exact details of your itinerary in the last trip to Canada. ♦ What specific elements made it such an enjoyable trip? <ul style="list-style-type: none"> ♦ Lots of detail –e.g. at this hotel we did this, here we met these people, talked with locals, etc.
<u>Day 2</u>	<u>Build on Great Experience</u> <ul style="list-style-type: none"> ♦ Read each others comments. ♦ Ask each other questions to clarify what the great experiences were and why.
<u>Day 3</u>	<u>Build Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Using that learning, let's build some great trip ideas. ♦ Also, check out specific sites for each region (to be recommended) as input.
<u>Day 4</u>	<u>Build Great Itineraries/Modules Regionally</u> <ul style="list-style-type: none"> ♦ Build more itinerary modules specifically for each region (B.C., Alberta, Manitoba, Ontario, Atlantic Canada).
<u>Day 5</u>	<u>Reaction to Our Ideas</u> <ul style="list-style-type: none"> ♦ Reaction to our modules and ideas clients want checked out.



European Forums

October 1, 2007, 2007
T703-07

European Forums

B. Prospective Visitors

<u>Day 1</u>	<u>Current Plans</u> <ul style="list-style-type: none"> ♦ What parts of Canada do you want to visit? ♦ What experiences are you looking for? Be specific on: <ul style="list-style-type: none"> - things to see and do, feel, experience.
<u>Day 2</u>	<u>B.C. Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums (to be inserted). ♦ Go to suggested websites. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in British Columbia.
<u>Day 3</u>	<u>Alberta Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums. ♦ Go to website. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in Alberta.
<u>Day 4</u>	<u>Ontario Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums. ♦ Go to website. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in Ontario.
<u>Day 5</u>	<u>Manitoba/Atlantic Canada Great Itineraries/Modules</u> <ul style="list-style-type: none"> ♦ Read ideas from past visitor forums. ♦ Go to website. ♦ Build great itinerary modules. ♦ Read each others comments ♦ Refine your ideas on great trip modules in Alberta/Atlantic Canada.

