



ETC STUDY ON CANADA

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Foreword

The European Travel Commission is to be congratulated for initiating this research on the Canadian outbound travel market. The Canadian outbound travel market is large and growing at a rate of about 6 per cent a year. Our surveys repeatedly show that Europe is the number one overseas destination that Canadians are most interested in visiting. The following research demonstrates that Europe is not only attractive to first time visitors but also repeat visitors.

While Canadians view Europe as the most attractive overseas destination they want to travel to, competition for the \$19 billion outbound travel market has intensified. The Caribbean and Mexico are marketed just as heavily in the summer and shoulder seasons now as they are in the winter. With the Canadian population mosaic having changed over the decades, Asian destinations have also become more important.

Europe can not rest on its laurels when it comes to attracting more Canadians to travel to its fine shores. This research report is evidence of the European Travel Commission's continuing interest in growing the Canadian travel market. We are grateful to the Commission and the Steering Committee for awarding us the privilege of undertaking this research. We are also appreciative of the direction and support offered by Commission staff and the Canadian based members of the Steering Committee.



1.0 Introduction

1.1 Background

The purpose of this study was to provide key insights concerning the potential pleasure travel market in Canada for Europe. The Canadian Tourism Research Institute (a division of The Conference Board of Canada) completed a quantitative analysis of the Canadian outbound market for Europe in July 1999. To obtain a more qualitative view of the Canadian outbound market, the following report was based on focus group research. The findings from this study should lead to the development of new marketing strategies for European tourism boards. *When reading the report, it is very important that travel executives' view any negative comments by focus group participants as a basis for constructive action. Further, negative or suggestive comments by participants do not necessarily reflect the same views held by the study's authors. As researchers, it is our responsibility to report these views (which overall were very positive) and suggest action on the part of the ETC and its members.*

1.2 Research Objectives

The objective of the focus group research was to observe the responses of Canadians who had visited Europe in the past five years and those that were very interested in visiting Europe during the next three years.

- Characteristics of previous European vacations
- Decision-making and planning process
- Use of travel agents
- Motivations for travel to Europe
- Comparisons of Europe to other competing long haul destinations
- Preferred destinations within Europe and reasons for choice
- Image of individual European countries
- Type of pleasure trip likely to take within the next few years
- Barriers to pleasure travel to Europe

1.3 Research Approach

Two consumer focus groups were held in Toronto on March 19th, 2001, in Montreal on April 20th, 2001, and in Vancouver on March 22nd, 2001. Within each city was a group of participants who had not vacationed in Europe previously, but who intended to do so within the next three years. The second group of participants in each city had vacationed in Europe in the previous five years and was interested in traveling to Europe within the next three years. All participants were 45 years or older with household incomes of at least \$70,000.

Roxanne Menzies moderated the Toronto and Vancouver groups, and Luc Gauthier moderated the Montreal groups in specially equipped facilities. The Montreal groups were conducted in French. The groups followed discussion guides that were prepared in advance, copies of which can be found in the appendix. Representatives from both the ETC and Signature Vacations were able to view the sessions via a one-way mirror. The six focus groups were video and audio taped, copies of which are on file at the ETC.

In addition to sharing their thoughts and opinions in the group discussions, participants were asked to fill out a questionnaire. This questionnaire was especially helpful in obtaining specific information regarding past travel to Europe.

1.4 Limitations of Qualitative Research

Qualitative research, and focus groups in particular, is an excellent means of exploring attitudes, feelings, and beliefs, in a particular area. Focus groups are useful for generating ideas and hypotheses for further consideration. It should be noted, however, that in reading any section of this report, the findings are based on the opinions of fifty-two participants from Toronto, Montreal, and Vancouver. These individuals were selected because they met certain criteria; they were not drawn as a representative sample of the population. The results should therefore be regarded as indicative, rather than conclusive – not to be used in isolation, but combined with marketing expertise.

2.0 Executive Summary of Key Findings

Some of the key findings of the study are identified below. Practical suggestions regarding the study findings are located in section 4.0.

- ◆ When thinking of traveling to Europe, Canadians generally do not consider traveling to other destinations such as Australia or Asia. Europe is seen as offering a diversity of cultures and history in a relatively small area compared with either Australia or Asia.
- ◆ While Australia and Asia are competing destinations for travelers to Europe, there are significant barriers presented in traveling to these two areas of the world. These barriers include the distance needed to travel, cost and in the case of Asia, language. Whereas Asia and Australia are seen more as “*once in a life time*” trips, Europe is seen as a destination that would be visited many times.
- ◆ Perceptions of countries within Europe are quite similar between Toronto and Vancouver travelers. Montreal travelers have significantly different opinions about the various European countries and their willingness to visit them.
- ◆ Toronto travelers appear to be the most adventuresome of the three cities surveyed and are the most informed as well. Most expressed an interest in traveling to numerous countries within Europe. Montreal travelers are primarily interested in visiting French speaking countries, are most likely to pre-book much of their vacation, and are not very adventurous. Vancouver travelers are less adventuresome than Toronto travelers, but more so than Montreal travelers.
- ◆ While most travelers use a number of information sources when planning a trip to Europe, their preferred sources of information vary significantly across between the three cities. Toronto travelers rely quite heavily on the Internet and word of mouth,

Montreal travelers on travel agents, and Vancouver travelers on printed materials.

- ◆ The opinions of friends and family are extremely important, particularly to Toronto and Vancouver travelers. Given the wide travel experience of the Toronto market, most travelers in this city have heard numerous stories from those who have traveled to Europe as well as other destinations. Although the stories in Vancouver might not be as plentiful, they are no less important.
- ◆ While Toronto travelers have an accurate perception of the costs associated with a two week European vacation (up to \$8,000 per person), both Montreal and Vancouver travelers, including those who have vacationed in Europe, significantly underestimate the per person costs of a two week vacation by \$2,000 to \$3,000.
- ◆ The greatest disadvantage of travel within Europe was seen to be the high cost. Accommodations, food, and car rentals including gas were perceived as being particularly expensive.
- ◆ Although most of those surveyed would prefer to travel to Europe with a scheduled airline, a large percentage think that the savings achieved when traveling with a chartered airline is more important.
- ◆ There is an assumption amongst Toronto travelers that they are able to easily obtain a direct flight to a wide variety of destinations within Europe. Vancouver travelers understand that they may need a connecting flight. Most Montreal travelers prefer to fly into Paris and expressed little interest in flying into other European cities.
- ◆ Few focus group participants were interested in specialty tours (i.e., walking tours, wine tasting). Specialty tours are important but appeal to small niche markets. Most focus group participants wanted to travel to Europe for sightseeing purposes. The diversity of cultures and Europe's rich history was the main attraction.

- ◆ Most of the focus group participants were of European descent although none indicated that their primary reason for travel to Europe was to visit friends and relatives. However, a majority of participants thought it was important that they traveled to the countries of their ancestors.

- ◆ The majority of travelers would like their European vacation to include a combination of urban and rural travel. Although most of the more popular attractions are found in large cities, travelers think that it is important to visit rural areas in order to meet the local people. Small hotels and bed and breakfast accommodations are preferred over large hotels, primarily because of the desire to experience the true culture of the country.

- ◆ Travelers do not have significant concerns regarding their safety or other issues when traveling to and within Europe. Those who are cautious are more likely to have the details of their vacation, including each night's accommodation, carefully planned out. Those who are less cautious expressed a greater desire to "*play it by ear*". Most participants in the Toronto and Vancouver focus groups wanted to make most of their arrangements for accommodation and sightseeing when they arrived. However, they tend to be well armed with information from the Internet (Toronto) and guidebooks and brochures.

3.0 Detailed Findings

This section presents the detailed findings of the qualitative research among participants. Conclusions and recommendations can be found in section 4.0 of this report.

3.1 Planning a Vacation

Participants who have not traveled to Europe are much more likely to want their vacation carefully planned out than those who have traveled to Europe. A higher degree of planning provides the former group with a higher degree of comfort. Comfort in terms of ensuring that there is little opportunity for something to go wrong and comfort in terms of ensuring that they are not missing any of the major attractions. Some of these less experienced travelers indicated they would pre-book each night's accommodation while others were comfortable with having only the first and last nights pre-booked. When speaking of this first trip to Europe, most indicated they would be more likely to have everything planned out than they would on their second trip when they are more familiar with the destination.

Quote: *"If your initial trip is structured you would not be wasting your time looking at things that you are less interested in or trying to find things. When you go back a second or third time, then you have got plenty of ideas as to what you really want to focus on and pinpoint to see or revisit."*

There is a wide variation in the degree of planning amongst participants who had previously traveled to Europe. At one end of the spectrum, are the frequent travelers who, in most cases, have relatives or friends in Europe and are more likely to "*play it by ear*". At the other end of the spectrum are the travelers who prefer to take packaged tours in which each night's accommodation is pre-booked. Overall, it appears that most prefer to have the first and last nights of their vacation pre-booked with a great deal of flexibility in between.

The amount of time in which participants allow themselves to plan a European vacation varies significantly from one traveler to the next.

The majority of those who had not been to Europe previously thought the planning process would be between six and twelve months although most were leaning towards the former. The actual booking would likely take place between one to four months before departure.

The majority of those who had vacationed in Europe spent between three and six months planning their vacation and made the actual booking between one and four months in advance. It is particularly interesting to note that, when asked what they would do differently when traveling to Europe again, most of the Toronto travelers said they would spend more time planning.

There is a minority of travelers who usually begin planning their next vacation one year in advance, upon the conclusion of their last vacation.

Seasons & Duration

Although Summer is the peak season for travel to Europe, over half of the participants surveyed indicated they would prefer to take a European vacation in the late Spring or early Fall. Past travelers were most likely to have traveled in the early Fall or Summer, followed by the Spring. Only a few had vacationed in Europe in the Winter.

Reasons for traveling in the shoulder seasons included less crowding, lower costs, and more comfortable weather. Crowding was the biggest concern however.

Several of the participants who are more likely to travel to Europe in the Summer indicated they would do so because of job restrictions or school restrictions for their children. Others prefer to travel in the hotter weather.

Most participants would prefer to travel to Europe for a period of three to four weeks. Those who had traveled to Europe previously were most likely to have taken a two to three week vacation.

Destination and Budget

Participants were asked if, when planning a trip to Europe, they start with a destination or a budget in mind. Although the two often go hand in hand, for most, they first chose their destination(s) and then built a vacation that fit what they wanted to spend.

Quote: *“You can adapt what kind of a holiday you have. It could be backpacking or it could be luxury hotels. You start off with a destination and then find out where it can take you.” “I find I start off lavish and peter off to being a little bit more conservative.”*

Although there are some countries within Europe that are less expensive than others, on the whole, Europe is regarded as an expensive destination. Accommodations and food were most frequently mentioned as being high priced, although there were a few mentions of the price of gasoline/petrol.

When asked what a two-week European vacation for one excluding airfare, but including accommodations, food, travel within Europe, and activities would cost, most Montreal and Vancouver participants were quite conservative.

Toronto

\$6,000 to \$8,000 – participants who *have not* traveled to Europe previously

\$4,000 to \$6,000 – participants who *have* traveled to Europe previously

Montreal

\$3,000 – participants who *have not* traveled to Europe previously

\$2,000 to \$3,000 – participants who *have* traveled to Europe previously

Vancouver

\$2,000 to \$3,000 – participants who *have not* traveled to Europe previously

\$2,000 – participants who *have* traveled to Europe previously

3.2 Information Sources

When choosing a destination and planning a vacation, most participants use a variety of sources to find the information they need. The information sources that they are most likely to focus on vary significantly in each of the three cities surveyed. In the end, participants are usually able to find the required information.

Word of Mouth

Participants' interest in a new destination is often first peaked through word of mouth.

Quote: “*The one thing that most people want to talk about is their trip. They tell you what they find good or what they find bad or where you should not go or how you should talk to the people there. Amazing, all of the little tips.*”

This word of mouth of family and friends is frequently regarded more highly than a travel agent's recommendations. Canadians rely quite heavily on the advice of relatives still living in Europe as well as others who have visited the country or countries they are most interested in. After choosing a destination some participants poll their family and friends for information on accommodations, restaurants, and attractions.

Word of mouth is particularly important amongst Toronto and Vancouver travelers. In Montreal, participants are more likely to place greater importance on the advice of travel agents.

Newspaper Travel Section

The destination articles within a newspaper's weekend travel section awaken participants' interest in a new destination and are popular with participants in each of the three cities surveyed.

The weekend section was also mentioned as a good source of information for comparing prices when viewing the tour operator and travel agency ads.

Additionally, the web sites featured in articles and ads are often found to be quite useful.

Travel Agents

Participants usually have specific ideas regarding their vacation based on word of mouth and research they have informally or formally conducted. Most will then speak to a travel agent for further validation, for additional ideas, for help in putting their schedule together, or for making the booking. Some participants choose to seek the advice of agents when first planning a vacation (Montreal travelers in particular), while others wait until they are nearing the end of the planning process. Either way, it is likely that they have chosen their destination and the countries they will visit prior to speaking with an agent.

The use of travel agents appears to vary quite significantly between each of the cities surveyed. Montreal participants regard travel agents as the most important source of information, are the most dependent on their advice, and are most likely to involve them when first planning a vacation. Experienced Toronto and Vancouver travelers are most likely to regard agents as "booking agents" to be used at the end of the planning process. Toronto and Vancouver participants who have not visited Europe previously are generally less dependent on the agent than are Montreal participants, but rely on their advice nonetheless.

A significant percentage of the participants surveyed have a personal relationship with their travel agent, meaning that they have a friend who also happens to be a travel agent.

These agents are invaluable as they are a trusted and knowledgeable source of information. They are also trusted for providing their friends with the best deals.

Not surprisingly, less experienced travelers generally rely more heavily on travel agents than do travelers that are more experienced. Those who have not been to Europe previously are more likely to have all of the elements of their vacation including flights, accommodations, and land travel booked by an agent in advance of their departure. Experienced travelers may book their flight and car rental through a travel agent, but are more likely to book their own accommodations (apart from the first and last nights of their vacation) after arriving in Europe. To this latter group, flexibility is very important.

There is a belief amongst some participants that they are able to book car rentals directly in Canada with the car rental companies at a price lower than that offered by travel agents.

Tour Operator Brochures

Participants often pick up several tour operator brochures when planning a vacation. Brochures provide participants with a general overview of each destination and are helpful for generating ideas. Those that include guided tours are especially useful for highlighting places of interest that they may see on their own or as part of a guided tour.

Brochures are also helpful for comparing the prices and amenities from one hotel to the next. They provide participants with a good idea of the total cost including airfare and accommodations so that participants can budget accordingly.

Toronto and Vancouver participants are more likely to pick up a variety of tour operator brochures when planning a European vacation. Montreal participants appear to place less importance on this medium.

The Internet

The Internet is an increasingly popular source of information, particularly amongst Toronto and Vancouver participants. Participants can usually find far more information on destinations than they would through a travel agent or tour operator brochures - accommodations, car rentals, places of interest including historical sites, and activities.

Participants are most likely to use search engines to find information on the destinations in which they are most interested. Web sites devoted exclusively to travel appear to be less popular and are perhaps more useful for choosing a destination than planning a vacation. This said, a number of participants use the Internet to price shop, particularly for airfare.

The Internet is helpful for those who are interested in specialty tours as well. For example, two of the Toronto participants take motorcycling vacations and are able to find the specific information they need on the Internet. A Vancouver consumer located a company that organizes walking tours.

Although the Internet is seen to be an excellent source of information, participants cautioned that there are drawbacks to using it. There are great amounts of information on some topics, but very little on others. The amount of information available on some topics is somewhat overwhelming. *“It’s wonderful, but too much. It’s a bit of overkill.”* Some of the items that receive less exposure on the Internet such as bed and breakfasts may be the most desirable. It was suggested that not only do bed and breakfasts receive less exposure, but those that are on the web may be less attractive due to a higher level of sophistication and perhaps higher cost.

Many questioned their level of expertise when using the Internet while others rely on the help of friends and family to search the Internet for them.

None of the participants surveyed have booked a vacation through the Internet. Most prefer to book their vacation through a travel agent, although a significant percentage call airlines, hotels, bed and breakfasts or car rental companies directly to make a booking. *A Conference Board of Canada Outbound Canada Tracking Service survey of Canadians in March 2001 indicates that 21% of Canadians intending to take a vacation trip this summer, were very likely (9%) or likely (12%) to book some or all of their trip (regardless of destination) using the Internet.*

Tourist Boards, Consulates or Chambers of Commerce

The terms tourist boards, consulates and chambers of commerce were sometimes used interchangeably. Many participants appear to be unable to differentiate between them.

Most participants who have tapped into the tourist boards consider them to be an excellent source of information. Others have not even thought of contacting them. Participants prefer to contact the Canadian office of European tourist boards for information although there are some who contact the tourist boards in Europe directly. Tourist boards provide participants with brochures that *“are amazing for the most part”*. *“You can get things like train and bus schedules, good maps, and accommodations rated high and low.”*

Their Internet sites, which are seen to provide a very comprehensive listing of accommodations and activities, are often found through search engines using a few key words.

Travel Guidebooks

Once a decision is made as to which country or countries to visit, many participants will purchase a guidebook or books to help them with detailed planning. *“I cannot get over how complete they are.”* Others are likely to visit the library and view the guidebooks and sometimes videos for help in choosing a destination or destinations as well as for detailed planning. These books are useful for determining the best places to visit, where to stay, and where to eat.

Although guidebooks are popular amongst participants in each of the three cities surveyed, those in Montreal were exceptionally complimentary when talking about the Michelin guides.

Television Travel Shows

Travel shows sometimes initiate participants' interest in a new destination, but are viewed intermittently, almost by accident.

Quote: “*On the weekend there is a good travel show. I am never sure what channel it is on or at what time, but if I catch it, I find it very informative.*”

In-Person Travel Shows

When the topic of consumer travel shows was raised, there was a fair amount of confusion. In Toronto, most were not aware of their existence, but thought that they were a great idea nonetheless. In Montreal and Vancouver, approximately half were aware of smaller events put together by a single tour operator, travel agency or destination, but had little knowledge of large scale consumer travel shows.

3.3 Europe vs. Other Destinations

When making the decision to travel to Europe, most participants do not consider other destinations such as Asia or Australia as alternatives. Asking if participants are considering one of these other destinations appears to be similar to asking them if they want to substitute breakfast for lunch not whether they want pasta or a hamburger for lunch.

Although a few of the participants surveyed have special interests (i.e., golfing, theatre), most would like to visit or have visited Europe for the history, culture, and sightseeing opportunities. Most Canadians are of European descent and have read and heard so much about Europe. For some, a trip to Europe is a dream, for others, a necessity.

Quote: *“From my point of view it would be the history or the culture and the sites we have seen, we have heard about, and we have read about. We have learned about so many of these sites of the world it would be nice to experience them. That would be my focus.”*

“I think it is more of a dream and I always wanted to go to Europe and could not when I was a kid – taking the dreams from my teenage years and transplanting them to these years. My dream was Europe and so the dream has matured so that is where I would start. I would start with what I did not do and always wanted to do.”

For those who have vacationed in Europe previously, the desire to return is just as strong if not stronger than for those who have never been to Europe. Most of this former group feel as if they have only seen and experienced a small segment of what Europe has to offer, and would like to see and experience so much more.

Quote: *“There are lots of other places that I would like to go and see, but every time you go to Europe you realize how much you have not seen yet or you just did not have time to spend as much time as you wanted to. I could have spent two months in Rome alone and we had like five days. I have to go back.”*

“What I saw I really enjoyed and it just really gave me the taste of what was still there to see and I do not know if I will ever be satisfied or if I am just going to keep going and run out of time to see everything there is”.

“I basically go just for pleasure and to see what I have learned in school, to see different places and stuff like that. A lot of people do it because it is in them.”

Participants were asked specifically what they see as the advantages and disadvantages of Europe as a travel destination compared to Asia and Australia,

Advantages of Europe

- ◆ The travel time from Toronto or Montreal to Europe is far less than the travel time to either Asia or Australia.
- ◆ Europe is made up of numerous small countries, which gives travelers the ability to more easily experience a number of different cultures in a short period of time.
- ◆ The flight cost from Toronto or Montreal to Europe is far less than the flight cost to either Asia or Australia.
- ◆ For many Canadians, a trip to Europe provides them with an opportunity to learn more about their heritage and, in some cases, visit family.
- ◆ Canadians have greater knowledge of the history of Europe and have studied Europe in school.

Quote: *“At school we studied it whether you call it the culture, the history, the languages ... it is an adventure, but it is sort of familiar, whereas the Orient, I do not know anything about. It was not something that I studied and Australia was non-existent so that is just too remote for me.”*

- ◆ Montreal participants prefer to travel to countries in which French is spoken. There is obviously a far greater possibility of this in Europe than in Asia or Australia. Some of the Vancouver participants were concerned that they might not be able to communicate when traveling in Asia.
- ◆ Crime is of a lesser concern when traveling in Europe than in Asia. In addition to the perception of higher crime, some are concerned that they will, as Caucasians, stand out and be more vulnerable as targets of crime in Asia.
- ◆ The culture in Asia is so different from Canada's that there is a greater fear amongst less experienced travelers that they would have difficulty with even relatively basic things such as ordering a meal.
- ◆ Health is of a lesser concern when traveling to Europe. When traveling to Asia or Australia, Canadians are required to get special vaccinations. There is also the perception that they are more likely to get sick, especially in Asia.

Disadvantages of Europe

- ◆ The cost of traveling within Europe, especially for accommodations and meals, is perceived as being very high as compared to traveling in Canada or Asia.

Quote: "Asia is just amazingly cheap. I've stayed in guesthouses for as little as 9 cents a night, and certainly I've stayed very often for \$2 or \$3 a night and they're perfectly adequate places. That's wonderful."

- ◆ In Europe, the currency is different from one country to the next although this will change in 2002.
- ◆ European cultures are more similar to Canadian culture than are the cultures within Asia, which are seen as being more exotic.

Quote: "I think Europe is more like North America. I find very little difference now. Historically it's certainly different, but as far as the accommodation and the facilities, it's very similar to North America." "I think Asia is a completely different culture and to me that's a real advantage because you see a whole different way of life."

- ◆ In Europe, some participants feared they might be hassled when crossing the border from one country to the next.
- ◆ Those who had traveled to Australia were extremely positive when describing their experience. Part of the country's appeal is its relative similarity to Canada.

3.4 Countries within Europe

During the focus groups, a few exercises were conducted to illicit opinions about various countries within Europe. First, participants were asked to list the countries to which they are most interested in visiting. Second, they were asked to list the countries to which they are least interested in visiting. And lastly, participants were asked to discuss a select group of countries in detail.

Countries of Greatest Interest

Overall, the European countries that the participants are most interested in traveling to are France, Italy, Spain, Greece, Switzerland, England, and Austria. However, the countries of greatest interest differed by city as indicated below.

Countries of Greatest Interest in Visiting

France	France	France
England	Switzerland	Italy
Italy	Italy	Spain
Spain	Spain	Greece
Greece		Germany
Switzerland		Ireland & N. Ireland
Ireland & N. Ireland		

When comparing those who have visited Europe previously to those who have not, some interesting differences emerge. Participants from both Toronto and Vancouver who have traveled to Europe are much more interested in visiting Portugal and Spain than are those who have not been to Europe. Experienced Montreal travelers are more interested in visiting Greece and are less interested in visiting Belgium than are those who have not vacationed in Europe.

Countries of Least Interest

Overall, the countries that participants are least interested in traveling to are the Eastern European countries including Poland, Russia and the Czech Republic. Poland, Germany, and Russia were least favoured amongst Toronto travelers while Montreal participants have less interest in visiting England, Russia, or Belgium. Vancouver travelers are least interested in visiting Poland, Russia, and the Netherlands.

Toronto and Vancouver participants who have not been to Europe are less likely to identify Eastern European countries as the ones they are least interested in visiting when compared with those who have traveled to Europe. This finding may have more to do with greater top-of-mind awareness of these countries amongst the latter group than with differences in preference. England is identified by a far greater percentage of Montreal participants who have not traveled to Europe as one of the countries they are least interested in visiting than by those who have visited Europe.

Focus Group Comments

The following represents some of the comments that focus group participants gave with respect to individual countries discussed during the sessions.

France

France - Toronto Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Very expensive, poor value ◆ Good beaches ◆ People are arrogant ◆ <i>“I heard the people were nasty in Paris but anywhere else that you go in small villages and towns they are overly friendly.”</i> ◆ Great culture, lots of culture ◆ Very romantic ◆ Northern France and its association with the war ◆ Many attractions (Eiffel Tower) ◆ Lots of shopping ◆ Very accessible 	<ul style="list-style-type: none"> ◆ <i>“Anybody that I have talked to has said that France has got to be one of the most expensive places to go in Europe and that is something that I would take into consideration when there is so much else to see. Why blow it all in France?”</i> ◆ <i>“Actually, I have not found France to be that bad. I had done the research before I went. When you look for smaller accommodation, very clean and comfortable, not necessarily a private bath ... I have found it equivalent to going to England or staying in Italy.”</i>

<ul style="list-style-type: none"> ◆ Safe place ◆ <i>“What I have heard would keep me away from Paris, but I would love to go to Northern France.”</i> ◆ <i>“Depending on what you want to do you can shape your holiday and go and visit a hundred museums, you can go to the countryside, you can go to bed and breakfasts, you can go into the south of France, you can go to the sea. There are all different types of holidays that you can have in a relatively small space. You can go back there continually and experience different things.”</i> ◆ People speak English 	<ul style="list-style-type: none"> ◆ <i>“The only thing that I remember as perhaps being a little bit different is in France you pay for everything you go to and see. It is worth seeing but it does cost you money.”</i> ◆ Beautiful, nice scenery ◆ People are nice ◆ Culture and history ◆ Romantic ◆ Fine dining, food is terrific ◆ Very accessible (by plane, tunnel or train) ◆ <i>“It has so much to offer, more than perhaps any other country.”</i>
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France - Montreal Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Very expensive ◆ Culture and history ◆ Museums, castles, the Côte d’Azur ◆ Good food ◆ Familiar 	<ul style="list-style-type: none"> ◆ Expensive ◆ Culture, museums ◆ Good meals, good wine ◆ Variety of accommodations ◆ Very accessible ◆ <i>“There are sixteen counties in France and ninety-nine departments – they are all different, you drive ten km and you find something different, it is a different world.”</i>

France - Vancouver Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Expensive (accommodations, food) ◆ Culture and history ◆ World renowned attractions in Paris ◆ Good food and wine ◆ Accessibility is very good ◆ Family destination ◆ Safe 	<ul style="list-style-type: none"> ◆ Wide variety of things to see and do ◆ Wonderful gardens ◆ Nightlife is quite interesting ◆ <i>“It was disgusting. The people were rude and it was filthy. I hated it. I never want to go there again.”</i> ◆ <i>“I found the people quite wonderful in Paris and very helpful.”</i> ◆ <i>“What I found really a problem in France is they sanitize their history.”</i>

Italy

Italy - Toronto Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Expensive ◆ Warm people even in the big cities, friendly ◆ Lots of art ◆ Rome, the Vatican 	<ul style="list-style-type: none"> ◆ Very expensive ◆ Hot climate ◆ Beautiful country ◆ Culture and arts ◆ Very romantic ◆ Good food ◆ History ◆ Beautiful buildings ◆ Wide variance in accommodations ◆ Not very safe (concerns regarding theft)

Italy - Montreal Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Lots of history ◆ Venice, gondolas ◆ Good shopping 	<ul style="list-style-type: none"> ◆ Very expensive ◆ <i>“What is the appeal of Italy? You should be asking why I don’t go there? It is because it is too expensive – but what appeals to me? Overall, Italy appeals to me – the culture, the climate, the music, the warmth of the people, the food, the wine.”</i>

Italy - Vancouver Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Unique ◆ History and culture ◆ Good food, good wine ◆ Lots of attractions ◆ Venice, gondolas 	<ul style="list-style-type: none"> ◆ People are wonderful, very expressive ◆ Rome, Florence, Pompeii ◆ Fabulous food ◆ History ◆ Buildings ◆ Not very safe (concerns regarding theft)

Spain

Spain - Toronto Participants	
Have Not Visited Europe	Have Visited Europe
Did not discuss Spain	<ul style="list-style-type: none"> ◆ Hot climate ◆ Beautiful sights and buildings ◆ People are very friendly ◆ <i>“I have asked people for a comparison between Spain and Portugal and I think that everybody has said that the people are far warmer in Portugal than in Spain where they are colder to you.”</i> ◆ Culture ◆ Bull fights ◆ <i>“They have one foot in Africa and one in Europe so they are very different in that respect ... everything you cannot find anywhere else but in Spain.”</i>

Spain - Montreal Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Reasonably priced ◆ Architecture left behind by the Moors ◆ Golf 	<ul style="list-style-type: none"> ◆ Less expensive, good value ◆ Great climate ◆ Hot blooded ◆ Safety concerns

Vancouver participants did not discuss Spain due to time limitations.

United Kingdom

United Kingdom - Toronto Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none">◆ People are warm◆ Historical buildings◆ Buckingham Palace◆ Towers, churches◆ Theatre◆ Golf (Scotland)	<ul style="list-style-type: none">◆ Expensive food◆ Wet climate◆ People are fun and helpful◆ Great theatre◆ Lots of history◆ <i>“Lots to do and lots of things to see.”</i>

United Kingdom - Montreal Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none">◆ Culture◆ Buckingham Palace◆ Big Ben	<ul style="list-style-type: none">◆ Expensive◆ Rainy and foggy◆ Culture◆ Driving on the left side is difficult

United Kingdom -Vancouver Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Expensive (accommodations, food) ◆ Poor weather ◆ <i>“I think you could spend a month there just on attractions.”</i> ◆ Theatre ◆ Accessibility is good ◆ <i>“That was the one place they never liked. They said of all the countries they went to, they would not go back to Britain. Expensive, the food, the weather wasn't great. Everything was fried. They couldn't eat the fish there. They said for the money they just wouldn't go back.”</i> ◆ History, museums, art galleries (Scotland) ◆ Scotch (Scotland) 	<ul style="list-style-type: none"> ◆ Very expensive (accommodations, food, gas) ◆ Wet ◆ Phenomenal history ◆ There is a lot to see ◆ St. Paul's Cathedral, Westminster Abbey ◆ <i>“The cultural elements are just wonderful, but it was just absolutely smog compared to Stockholm.”</i> ◆ Dirty ◆ Very expensive (Scotland) ◆ Very rugged and quite wonderful naturally (Scotland)

Germany

Germany - Toronto Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Expensive, former East Germany is less expensive ◆ Good food ◆ Lots of beautiful attractions ◆ Accessible ◆ Safe ◆ <i>“I do not want to go because of its history.”</i> 	<ul style="list-style-type: none"> ◆ Expensive ◆ Beautiful ◆ <i>“I understand it is a fabulous place to do a castle tour.”</i> ◆ Safe ◆ <i>“I have been to Germany quite a lot actually and I think there is a big difference between the Northern part and the Southern part when it comes to people. Of course they are a bit warmer the further south you go. And there are some extraordinary places to see. Very interesting.”</i>

Germany - Montreal Participants

Have Not Visited Europe	Have Visited Europe
<p>Did not discuss Germany</p>	<ul style="list-style-type: none"> ◆ Expensive ◆ Countryside is beautiful ◆ East Germany is very beautiful ◆ Culture and history ◆ Food is different compared to the rest of Europe - it is not as refined ◆ <i>“When you think that fifty years ago, they were in ruins, and today they are building everything using colours – I thought the houses were beautiful – very colourful.”</i>

Germany - Vancouver Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ History ◆ Good food, great beer and wine ◆ Lots of attractions ◆ Variety of accommodations ◆ Very accessible 	<ul style="list-style-type: none"> ◆ Restaurants are very expensive ◆ Beautiful, clean and orderly ◆ People take pride in what they do ◆ Magnificent castles ◆ <i>“The tour along the Rhine is quite amazing.”</i>

Ireland & N. Ireland

Ireland & N. Ireland - Toronto Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Beautiful scenery ◆ <i>“I always love movies that are set in Ireland. If you are staying out of the big cities and in the smaller towns and so on, people are extraordinarily friendly.”</i> 	<ul style="list-style-type: none"> ◆ Expensive, but not as expensive as England ◆ Beautiful countryside ◆ <i>“My perception is it is a very friendly environment to visit, that visitors are well received, treated very nicely, and the time of day is spent to talk to visitors.”</i> ◆ Horseback riding ◆ Probably not safe

Ireland & N. Ireland - Montreal Participants	
Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Cold and rainy ◆ Beautiful, green countryside ◆ Very clean ◆ <i>“Ireland doesn’t attract me because of the confrontations. I have a bad feeling.”</i> 	<ul style="list-style-type: none"> ◆ Hard climate ◆ Very green ◆ <i>“It is magnificent and very pleasant, but you have to be in great shape to go to Ireland because it is very windy and cold.”</i> ◆ Wonderful people ◆ Good music ◆ Driving on the left side is difficult ◆ Safety is a concern ◆ <i>“There are bombs going off – less now</i>

	<p><i>– but it is not solved this problem with the IRA; I don't think I would be afraid, but it is not a family destination because of the danger involved.”</i></p>
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Ireland & N. Ireland - Vancouver Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Less expensive than England ◆ People are nice ◆ Great bed and breakfasts, very friendly ◆ Great culture, beautiful music ◆ Guinness beer ◆ Golfing is fantastic ◆ Unsure of safety 	<ul style="list-style-type: none"> ◆ Beautiful ◆ People are nice ◆ Wonderful music ◆ Good food ◆ Guinness beer

Netherlands

Of the countries discussed in detail, participants had a little more difficulty describing the Netherlands.

Quote: *“It's a country that we don't have an opinion on because we never hear about it. We hear of Amsterdam, but not much more than that.”*

Netherlands - Toronto Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Expensive ◆ Windmills, canals ◆ People are warm ◆ Very progressive social policies ◆ Historical connection with Canada, Canadians are well received ◆ Drug problems 	<ul style="list-style-type: none"> ◆ Beautiful windmills in the countryside ◆ Very wholesome country ◆ Tulips, lace, cheese ◆ Attractive architecture ◆ Good relationship with Canada as a result of World War II. ◆ Prostitution is legal and very prominent ◆ <i>“I do not know how safe it is because of the masses of drugs in Amsterdam. That has been going on since I can remember growing up and when they start talking about drugs, they always mention Amsterdam.”</i>

Netherlands - Montreal Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Windmills, tulips 	<ul style="list-style-type: none"> ◆ Beautiful ◆ Windmills, dykes ◆ Flower market, cheese, bicycling, diamonds, ◆ Nice museums ◆ <i>“They are very tolerant there – for soft drugs, prostitution, you can buy beer at three in the morning in the street.”</i>

Netherlands - Vancouver Participants

Have Not Visited Europe	Have Visited Europe
<ul style="list-style-type: none"> ◆ Amsterdam is expensive ◆ Variety of accommodations ◆ Good cheese ◆ Marijuana is legal 	<ul style="list-style-type: none"> ◆ Cold climate ◆ Very friendly and hospitable ◆ Tulips ◆ Van Gogh museum ◆ Delft pottery ◆ <i>“I like Holland because they just have this neutral attitude like the Swiss.”</i> ◆ <i>“I think Holland is also very progressive in a social sense. They've done amazing things with criminality, with their drug laws, for example.”</i>

Other European Countries

Austria

- ◆ *“I would like to visit Austria and Hungary because of the romance of the 16th & 17th centuries when they were in their glory days.”*
- ◆ Music festival

Belgium

- ◆ Colder climate
- ◆ People are very warm and nice
- ◆ Beautiful lace

Greece

- ◆ Beautiful, warm
- ◆ Greek Islands, sun and sand
- ◆ People are friendly
- ◆ So much culture and food
- ◆ *“I like Greece because of its history.”*

Portugal

- ◆ Less expensive, good value (accommodations, car rentals)
- ◆ Warm climate
- ◆ *“I have asked people for a comparison between Spain and Portugal and I think that everybody has said that the people are far warmer in Portugal than in Spain where they are colder to you.”*

- ◆ *“I’ve heard a lot about Portugal, it is that tourism is not as developed as in Spain – it means less security, it is clean, they are evolving rapidly – in ten years things have really advanced.”*

Switzerland

- ◆ *“I love it. I love the scenery and the buildings. I have read about it”*
- ◆ Accommodations can be very expensive
- ◆ The Alps
- ◆ Rich and powerful
- ◆ *“I found that it was in many respects more of a touristy kind of place, that they're just there to get the tourist dollar. I didn't feel as welcome as some of the other countries.”*

Scandinavian Countries

Most participants did not have a clear image of Scandinavian countries and had difficulty discussing them in some detail. Some of the comments were:

- Expensive
- Cold climate
- Beautiful
- Glaciers
- Laid back and easy going
- Safety is not a issue
- Less accessible

Finland

- ◆ *“I think that it is a good family destination, very social, very developed.”*
- ◆ *“The trip to Finland was absolutely wonderful. We took a boat over to Helsinki. It's one of the more liveable cities because the population is only about 500,000 and it was just wonderful walking around there, walking through the market.”*

Norway

- ◆ *“I am interested in visiting Norway because I have a feeling that it is a lot like Canada, but it must be different too, so I am kind of curious about that.”*

Sweden

- ◆ Restaurants are very expensive
- ◆ People are very friendly
- ◆ *“Their culture is very intriguing to me, they are so well educated.”*
- ◆ A bit unordinary. Sweden is less known.

Eastern European Countries

- ◆ Less expensive
- ◆ *“It is less luxurious unless you pay lots of money.”*
- ◆ More exotic
- ◆ Some countries are corrupt
- ◆ Political instability
- ◆ Safety is a concern

Czech Republic

- ◆ Prague is a magnificent city, gorgeous
- ◆ It is really unsafe
- ◆ Politically unstable

Poland

- ◆ Less expensive, lower cost of living
- ◆ Cold climate

- ◆ War torn
- ◆ *“It is more exotic than the rest of Europe I have seen, I would like to go there. Also, I have met a lot of Poles in Montreal and Romanians and I think these people are so warm, extremely so, and they have the simplicity of the Quebecois.”*

Romania

- ◆ Less expensive, lower cost of living
- ◆ War torn
- ◆ *“It is one of the worse places to go to right now.”*
- ◆ *“It is more exotic than the rest of Europe I have seen, I would like to go there. Also, I have met a lot of Poles in Montreal and Romanians and I think these people are so warm, extremely so, and they have the simplicity of the Quebecois.”*

Russia

- ◆ Moscow is beautiful
- ◆ People are not too friendly
- ◆ *“I’m scared of it now. There’s too much crime now.”*
- ◆ *“I would love to see Russia but I would never do it for political reasons. So it is safety factors.”*

Turkey

- ◆ People are friendly
- ◆ Incredible history

3.5 Package Travel

While discussing European vacations, five categories of package travel were highlighted.

- ◆ There are a wide variety of special interest tours, which generally do not offer a high degree of flexibility. Of the participants surveyed, one was interested in motorcycling tours, another in theatre packages, and another in walking tours.
- ◆ A few participants like to take bus tours such as those offered by Globus or Trafalgar in which all aspects of the vacation are planned and booked in advance.

Quote: *“I love that. It’s complete control. I don’t want to think of anything, worry about anything, land in an inadequate restaurant or something like that.”*

This type of vacation did not appeal to most participants given the highly regulated nature of the tours. Most would like far greater flexibility including the ability to spend more or less time at a given destination or attraction depending upon their level of interest. Another shortcoming of this type of tour is the early start time each day.

- ◆ A few participants had taken European cruise vacations. They were cited as a great way of discovering Northern Europe and the Mediterranean countries. While cruising, travelers often discover destinations that they would like to spend more time in and, as a result, plan a subsequent land vacation.
- ◆ Each of the major Canadian tour operators offer package vacations that are similar to those offered to the Caribbean or Mexico. These packages include flights, accommodations, and the option of car rentals and meal plans. Many would consider this type of vacation when traveling to countries such as Greece, Spain, and the U.K.

- ◆ Packages that are most common amongst the participants surveyed include flights and at least one other component of the vacation. These packages are also offered by large Canadian tour operators and, along with the flights, may or may not include a car rental and may or may not include all or a portion of the accommodations.

A few advantages were cited for booking a European vacation through a large Canadian tour operator. The two primary reasons are lower cost and familiarity.

Quote: “I think there are economies of scale by using a tour operator. I think that overall you are going to get the most for the least. It is still expensive, but you are going to get a lot in that package.”

3.6 Travel Preferences

Party Composition

The vast majority of participants prefer to travel with one other person when visiting Europe. Past travelers were most likely to have traveled with their spouse, although there were a few who had traveled with a friend or sister. Some had vacationed with their adult children, but most had little interest in traveling with school age children or grandchildren, primarily due to the high cost.

Airlines

Just under half of those who had been to Europe, had flown on a scheduled airline. Scheduled airlines mentioned included Air Canada, Canadian, British Airways, KLM, and Air France. Although most participants preferred to travel with scheduled airlines, a significant number traveled with the charter carriers in order to save money. Of the three cities surveyed, Vancouver travelers were most likely to have flown on a charter airline when traveling to Europe.

Quote: “We were looking at flights to London the last time and I phoned British Airways. I think it was something like \$1,500 a person, whereas Air Transat was only \$750 a person. I was thinking ‘a scheduled airline is nice, but I’d rather spend this money on something else’, and in some ways you regret it. You have to put up with it.”

“You get what you pay for, and usually you’re just so darn glad just to be going you’ll sit in a tin can just to get there. It’s awful sometimes”.

The most common complaint regarding the charter airlines is lack of leg room, although poor on time performance was also mentioned. Little difference is seen from one charter airline to the next.

Quote: “I have found that all three of them; Canada 3000, Air Transat, and Royal are all the same. They are always late, they are not reliable.”

Cities Flown Into

Given the vast array of options available, there is an assumption amongst Toronto participants that they are able to take a direct flight into the European country of their choice. If Germany is their primary destination, they will fly into Frankfurt, Berlin, Munich, Dusseldorf or Hamburg. If Spain is their primary destination, they will fly into Madrid or Malaga and so on.

The majority of Montreal participants were more interested in visiting France than any other destination. It follows that they would be most likely to take a direct flight into Paris.

Most Vancouver participants assume that they will need to transfer on route to their final destination. They might fly to Toronto and then transfer or they might fly to a major European city such as London and then transfer.

Urban versus Rural

Most participants prefer to take a European vacation that includes both urban and rural travel with a greater percentage of time spent in larger cities, as this is where most of the historical sites are located. Participants also expressed a need to travel to rural areas to interact with local people and to view the countryside. It is in the countryside that participants believed they would best be able to experience the local cuisine and to have a more authentic travel experience.

Accommodations

Most participants prefer to stay in small hotels and bed and breakfasts while traveling in Europe. Large hotels are seen as too expensive and not reflective of the local culture. Bed and breakfasts were frequently mentioned as a preferred accommodation especially while traveling in the U.K.

Transportation

Although car rentals were most frequently mentioned as the preferred mode of transportation when traveling within Europe, a variety of other types of travel were also mentioned. Car rentals are often preferred as they provide travelers with the greatest amount of flexibility. While the price of the car rental itself seemed reasonable to participants, gas prices were not.

Train travel was mentioned by several participants as offering a degree of flexibility at a reasonable price. Motorcycling, bicycling and walking were also mentioned by a few.

One consumer complained of the difficulty encountered when trying to obtain direct flights when traveling within Europe.

Quote: *“I was planning a tour two years ago and I wanted to go to Spain, Germany, and Russia. Well, then you call the travel agent and they say “Sorry you cannot do that because within the air band that you are trying to fly, they all fly to Frankfurt.” You fly from Frankfurt to Russia, and then back to Frankfurt, then to Spain, then back to Frankfurt again. It sounds so illogical. So I had to drop my idea of Spain and go directly to Frankfurt. I flew from Frankfurt to Berlin, then back to Frankfurt, then to Moscow, and then back to Frankfurt. It was ridiculous.”*

Activities

The focus group research indicated very clearly that most participants visited Europe to enjoy sightseeing, learn about history, and European cultures. More specifically, participants expressed an interest in doing the following activities when travelling to Europe.

- ◆ Visit historical buildings (incl. castles, churches, etc.)
- ◆ Enjoy local cuisine
- ◆ Visit museums
- ◆ Go to the theatre
- ◆ Interact with local people
- ◆ See the countryside
- ◆ Partake in the arts (incl. galleries, etc.)
- ◆ To bicycle
- ◆ Play golf
- ◆ Visit beaches
- ◆ Visit the many gardens
- ◆ Go skiing
- ◆ Motorcycling

This variety of activities (although with a cultural and history orientation) makes Europe an appealing destination to a number of travel market segments.

3.7 Concerns

Apart from discussions regarding Eastern Europe in which safety concerns are significant, most participants have only a little apprehension when thinking of traveling to Europe.

- ◆ Currency is seen as more of a hassle than a concern. Participants mentioned the importance of having the local currency for a few necessities when first entering each country. After arriving in a country, they felt comfortable in knowing that they could obtain more money if needed using their credit cards and debit cards.
- ◆ Although language is an issue for both English and French speaking Canadians, it is more so for the latter. For some English speaking Canadians there is a fear that they may find themselves in a town or village in which English is not spoken. However, this would not deter them from travelling to these areas. Several of the French speaking focus group participants indicated they would not travel to countries in which French is not spoken.
- ◆ Theft is of a greater concern in some countries than others. Italy and Spain were singled out as countries in which travelers are most concerned about being robbed.
- ◆ While adequate health care is obviously important for those with health problems, it is also a concern for others who may be injured or become ill. Participants want to be assured that they have the appropriate health insurance and that the local medical facilities are satisfactory.
- ◆ A few participants who had traveled to Europe were especially concerned that their relatives in Canada be able to contact them, particularly when the accommodations are not pre-booked. After some discussion, it was agreed that a cell phone could eliminate this concern.

4.0 Conclusions and Recommendations

The purpose of research is to provide actionable conclusions and recommendations. In the spirit of facilitating this process, we have outlined below what we believe to be the primary proposals for action based on the research findings contained herein.

- ◆ Consumers are just as interested, if not more so, in traveling to Europe in the Spring or Fall than in the Summer. Thinking of a six-month lead-time in planning as a guide, it follows that promotion of this destination should begin in October or November.
- ◆ When promoting Europe, focus should be placed on some of the advantages listed on pages 15 to 17.
 - The age 45 plus travel market segment is nostalgic. These consumers are interested in the origins of their ancestors and in bringing the pages of their childhood history books to life.
 - Emphasis should be placed on the diversity of history and culture that can be found within a small radius.
- ◆ To many consumers, tourist boards are not top-of-mind. Given that the majority of consumers surveyed read the travel section in the weekend newspaper, this may be a good place to increase awareness levels.
- ◆ The Internet is an increasingly popular source of information, particularly amongst Toronto and Vancouver consumers. Tourist boards need to ensure their web sites are included in all promotional materials as well as newspaper and magazine articles.
- ◆ A large percentage of consumers use search engines to find the destination information they are seeking on the Internet rather than visiting specific travel sites directly. It is imperative that tourist boards ensure their sites are indexed with each of

the most popular search engines.

- ◆ While it is important that the tourist boards have positive relationships with travel agencies throughout the country, these relationships are especially important in the Montreal market. In addition, French language printed materials should be made available at the Montreal agencies for consumers planning a trip to Europe.
- ◆ When traveling to Europe, a “flexible holiday” is especially important to repeat visitors as well as to a segment of first time visitors. While promoting Europe, emphasis should be placed on the ease at which a flexible holiday can be obtained.
- ◆ The most popular type of package vacation appears to be that which includes flights, first and last night accommodation, and car rental. Tourist boards should continue to work with tour operators in the development and promotion of these packages.
- ◆ Specialty tours, although important, appeal to select segments of the population. These tours are best promoted through special interest groups (web sites, printed materials, etc.), not through the mass media.
- ◆ Understanding that most consumers prefer a European vacation that includes both urban and rural travel, it is important that each of these components is promoted by the tourist boards and included in packages created by tour operators.
- ◆ Focus should be placed on small hotels and bed and breakfasts, which are the preferred accommodations, by most of the consumers surveyed.
- ◆ Given that consumers have the perception that Europe is quite expensive, the countries that are perceived to be less so, such as Spain and Portugal, should ensure their promotional materials indicate how affordable travel is in their countries.

- ◆ As a large percentage of past travelers are interested in visiting Europe again, it is important that destinations develop and maintain a database for direct marketing to these consumers. These follow-up marketing campaigns will want to appeal to the variety of tourism opportunities possible at a destination.
- 

5.0 Appendix

Appendix A: Discussion Guide for Focus Group Participants That **Had Not Vacationed in Europe** Previously but Were Very Interested in Visiting Europe in the Next Three Years.

Appendix B: Discussion Guide for Focus Group Participants That **Had Vacationed in Europe** in past five years and were Very Interested in Visiting Europe again in the Next Three Years.

Appendix C: Focus Group Schedule

Appendix A

ETC Canada Study - 2001

Not Vacationed in Europe Previously

Discussion Guide – Final

Introduction (5 approx. minutes)

- *Introduction by moderator, explain focus groups, expectations of respondents.*
- *Respondents introduce themselves; describe family, favourite hobby or activity.*
- *Introduce topic - vacation travel within Europe*
- *Ask respondents to identify the destination(s) outside of Canada and the U.S. that they have traveled to for a vacation within the past five years.*

European Vacation (5 approx. minutes)

- Apart from the exercise that you were asked to do in preparation for this evening's focus group, had anyone already begun planning a trip to Europe? *If so, ask ...*
 - When did you start planning this trip and when do you plan to travel?
 - Tell me about the process that you (and your partner) are going through in planning this vacation.
 - Who was it that initiated the idea? At that time had you/he/she already gathered some information on Europe?
 - *If appropriate, ask ...* When and how did you make the final decision to book the trip? Was there one particular factor that was most important in encouraging you to complete the decision?
- *Open up to the group.* How far in advance would you begin planning a European vacation and how far in advance do you think you would book it?

Research (15 approx. minutes)

- I would now like you to focus on the research that you have been asked to do in the previous week or so along with any other research that you may have done in preparation for a trip to Europe.
- Did you decide on the destination(s) first or price range first and then decide which type of travel or activities fit into your price range?
 - Where was information obtained for these decisions (*probe for information obtained directly from travel agent, brochures, **the Internet**, newspapers, magazines, television, travel books, advertising, etc.*)?
 - What were the most useful sources of information? *Probe.*
 - Were there any sources of information that were either not available or were of little use to you? *Probe.*
- What other difficulties did you have in planning your vacation? *Probe.*

Travel Agent (5 approx. minutes)

- Do you usually book your vacations through one particular travel agent?
- What components of a trip to Europe did you or would you book through a travel agent?
- To what extent did you or would you rely on the advice of a travel agent when deciding which countries to visit and other components of your vacation (*flight, accommodation, in-destination travel, attractions, etc.*)?
- When and how did you or would you pick the tour operator, accommodations, etc?

Airlines (5 approx. minutes)

- When traveling to Europe would you be more likely to fly with a scheduled or a charter airline?
 - When and how did you or would you choose the airline?
 - How important is this?
 - Which airline do you prefer to travel with? Why?
 - Which airline do you usually travel with? Why?

Europe vs. Other Destinations (15 approx. minutes)

- Are there other destinations, apart from Europe, that you are considering taking a vacation to or other destinations that you had considered before choosing Europe?
Probe.
- When taking a trip to a destination like Europe, Asia or even Australia, what would you say would be your primary interest or motivation for taking such a trip (*just touring around, to see new cultures, experience new things, to relax, to learn, etc.*)?
- What do you see as the main advantages of Europe over _____ (*other destinations mentioned*)?
- What do you see as the main disadvantages of Europe over _____ (*other destinations mentioned*)?

Europe (10 approx. minutes)

- At what time of the year and for what period of time do you think you would most likely travel to Europe?
 - How likely is it that you would travel to Europe at other times of the year? *Probe on the shoulder seasons – spring and fall.*
- Are there individual elements of travel to Europe that you see as being more unreasonably priced than others? *Probe on value for money.*

Countries within Europe (25 approx. minutes)

- I'd like you to, on a piece of paper, identify two things ...
 - The European countries that you would personally be most interested in traveling to.
 - The European countries that you would personally be least interested in traveling to.
- What countries did you choose as the ones you would personally be most interested in traveling to and why? Are these also the countries that you would be most likely to travel to?

- What countries did you choose as the ones you would personally be least interested in traveling to and why?
- Let's talk about your perceptions of some of these countries in greater detail. For each country that I name, I would like you to tell me about some of the elements listed on the chart (*flights – accessibility, accommodations – price, variety, quality, amenities, special interests, culture / history, weather, food, safety, attractions, sports, shopping, value - good vs. poor, as a family destination*).
France, Germany, Italy, Ireland, Netherlands, Spain, United Kingdom
Eastern European Countries
Scandinavian Countries
- Which types of activities are you most interested in and would you be most likely to take part in (*note interest in the specialty market*)?

Concerns (5 approx. minutes)

- What types of concerns do you have when thinking of traveling to and within Europe (*lack of direct flights, currency conversion concerns, not knowing where to go or what to do, ease of travel within, border questions, etc.*)?

Travel Preferences (15 approx. minutes)

- Which city would you fly into on your European vacation?
- Would you prefer to stay within larger cities or travel to more rural areas?
 - What kind of travel experience are you seeking in each of these?
 - At what type of accommodation would you prefer to stay?
- How would you most likely travel around within Europe (*car rental, train, bus*)?
- Would you prefer to have all the elements (*accommodation, car rental, train, bus, attractions, etc.*) of your vacation pre-booked and carefully planned out or would you prefer to have a fair amount of flexibility upon arriving in your destination?
 - When purchasing a package, what are you looking for that you wouldn't book on your own.

Appendix B

ETC Canada Study - 2001

Vacationed in Europe Previously

Discussion Guide – Final

Introduction (5 approx. minutes)

- *Introduction by moderator, explain focus groups, expectations of respondents.*
- *Respondents introduce themselves; describe family, favourite hobby or activity.*
- *Introduce topic - vacation travel within Europe*
- *Ask respondents to identify the destination(s) outside of Canada and the U.S. that they have traveled to for a vacation within the past five years.*

Most Recent European Vacation (10 approx. minutes)

- When and how long was your European vacation? What countries did you visit and who did you travel with?
- How far in advance did you begin planning your trip and how far in advance did you book it (*flight, accommodation, travel in-destination, attractions etc.*)?
- Tell me about the process that you (and your partner) went through in planning this particular vacation.
 - Who was it that initiated the idea? At that time had you/he/she already gathered some information on Europe?

Research (15 approx. minutes)

- Did you decide on the destination(s) first or price range first and then decide which type of travel or activities fit into your price range?
 - Where was information obtained for these decisions (*probe for information obtained directly from travel agent, brochures, **the Internet**, newspapers, magazines, television, travel books, advertising, etc.*)?
 - What were the most useful sources of information? *Probe.*

- Were there any sources of information that were either not available or were of little use to you? *Probe.*
- What other difficulties did you have in planning your vacation? *Probe.*
- When and how did you make the final decision to book the trip? Was there one particular factor that was most important in encouraging you to complete the decision?

Travel Agent (5 approx. minutes)

- When and how did you choose a travel agent?
- What components of your trip did you book through a travel agent?
- To what extent did your travel agent influence your decision to travel to Europe, the countries that you visited and other components of your vacation (*flight, accommodation, in-destination travel, attractions, etc.*)?
- When and how did you pick the tour operator, accommodations, etc?

Airlines (5 approx. minutes)

- When traveling to Europe did you fly with a scheduled or charter airline?
 - When and how did you choose the airline?
 - How important is this?
 - Which airline do you prefer to travel with? Why?
 - Which airline do you usually travel with? Why?

Europe vs. Other Destinations (15 approx. minutes)

- You have all indicated that you are likely to take another European vacation within the next few years. Are there other destinations, apart from Europe, that you are considering or other destinations that you had considered before choosing Europe? *Probe.*
- When taking a trip to a destination like Europe, Asia or even Australia, what would you say would be your primary interest or motivation for taking such a trip (*just touring around, to see new cultures, experience new things, to relax, to learn, etc.*)?

- What do you see as the main advantages of Europe over _____ (*other destinations mentioned*)?
- What do you see as the main disadvantages of Europe over _____ (*other destinations mentioned*)?

Europe (10 approx. minutes)

- At what time of the year and for what period of time do you think you would most likely travel to Europe?
 - How likely is it that you would travel to Europe at other times of the year? *Probe on the shoulder seasons – spring and fall.*
- Are there individual elements of travel to Europe that you see as being more unreasonably priced than others? *Probe on value for money.*

Countries within Europe (25 approx. minutes)

- I'd like you to, on a piece of paper, identify two things ...
 - The European countries that you would personally be most interested in traveling to.
 - The European countries that you would personally be least interested in traveling to.
- What countries did you choose as the ones you would personally be most interested in traveling to and why? Are these also the countries that you would be most likely to travel to?
- What countries did you choose as the ones you would personally be least interested in traveling to and why?
- Let's talk about your perceptions of some of these countries in greater detail. For each country that I name, I would like you to tell me about some of the elements listed on the chart (*flights – accessibility, accommodations – price, variety, quality, amenities, special interest, culture / history, weather, food, safety, attractions, sports, shopping, value - good vs. poor, as a family destination*).

France, Germany, Ireland, Italy, Netherlands, Spain, United Kingdom

Eastern European Countries

Scandinavian Countries

- Which types of activities are you most interested in and would you be most likely to take part in (*note interest in the specialty market*)?

Concerns (5 approx. minutes)

- What types of concerns do you have when thinking of traveling to and within Europe (*lack of direct flights, currency conversion concerns, not knowing where to go or what to do, ease of travel within, border questions, etc.*)?

Travel Preferences (15 approx. minutes)

- Which city did you fly into on your most recent European vacation?
 - Which city would you fly into for a future trip to Europe?
- Do you prefer to stay within larger cities or travel to more rural areas?
 - What kind of travel experience are you seeking in each of these?
 - At what type of accommodation would you prefer to stay?
- How did you travel around within Europe (*car rental, train, bus*)?
 - How would you travel around on your next European vacation?
- Did you have all the elements (*accommodation, car rental, train, bus, attractions, etc.*) of your vacation pre-booked and carefully planned out or did you have a fair amount of flexibility upon arriving in your destination?
 - What would you do differently on your next vacation?
 - When purchasing a package, what are you looking for that you wouldn't book on your own

Appendix C

Focus Group Schedule

City: [Toronto](#)

Date: March 19, 2001

Time: 6:00 p.m. and 8:00 p.m.

Location: Research House
1867 Yonge Street, 2nd Floor
Toronto M4S 1Y5
Tel: 416-488-2328

City: [Montreal](#)

Date: March 20, 2001

Time: 6:00 p.m. and 8:00 p.m.

Location: Contemporary Research
1250 Guy, Suite 802
Montreal H3H 2T4
Tel: 800-932-7511

Location: [Vancouver](#)

Date: March 22, 2001

Time: 6:00 p.m. and 8:00 p.m.

Location: Contemporary Research
1398 West 7th Avenue
Vancouver V6H 3W5
Tel: 604-714-5900