



Executive Summary

The Strategic Counsel (TSC) is pleased to provide this report to Global Affairs Canada (GAC) following completion of a comprehensive qualitative and quantitative research study among Canadian citizens who travel internationally for business and/or pleasure, as well as other types of activities such as volunteer commitments or study, as well as with travel professionals. The 2018 study provides an update to previous research studies undertaken by The Strategic Counsel with Canadians traveling internationally in 2007 and 2008, although the current study contains many new areas of questioning to reflect a significant refocusing of the research objectives.

A. Background and Objectives

The number of Canadians traveling abroad has been steadily increasing, up 21% from ten years ago, and the destinations to which they travel are more diversified. According to recently available statistics, Canadians made 32.5 million overnight trips outside the country in 2015, of which 82% were for leisure.¹ While many Canadians continue to travel frequently to the United States (which remains the top travel destination for those traveling outside Canada), as well as the 'sun' destinations (i.e., Mexico and the Caribbean) and Europe, travel to less familiar and more remote parts of the world is also on the rise. A growing proportion of Canadians are now travelling to the Asia/Pacific region – China, Hong Kong, Japan and Thailand are the most popular destinations in the region. Although it represents a smaller proportion of the overall travel market, adventure or experiential travel is also on the rise with increasing numbers of international travellers drawn to more exotic locations and wanting to incorporate activities involving a higher risk, such as mountain biking, rock climbing, deep sea diving or skydiving, into their vacation plans.

While most international trips are completely without incident, it is the role of the Government of Canada and specifically Consular Services within GAC to provide information to Canadian citizens on safe travel and to offer consular assistance should they find themselves in trouble while they are abroad. In keeping with the need to adapt to a changing consular environment and the evolving international travel patterns of Canadian citizens, GAC undertook to track and update the two public opinion research studies undertaken in 2007 and 2008, and which were also completed by The Strategic Counsel, with Canadian travellers and industry professionals.

The previous research concluded that Canadian travellers' approach to trip planning is somewhat ad hoc and, while safety and security is a concern, less attention is paid to this aspect of trip planning compared to other aspects. In terms of key sources of information, the Government of Canada, while credible and generally seen as easy to find when needed, was viewed as a secondary source for both travellers and travel professionals, with many sourcing information from travel guides and Internet sites. Ultimately though, the Government of Canada was seen as travellers' main resource in case of trouble when travelling abroad.

This current study continues to explore the behaviours, attitudes, needs and expectations of Canadian travellers a decade later. Combined, the qualitative and quantitative phases were designed to address a range of objectives, including:

- Determining what sources of information Canadians require to make safer and smarter travel decisions and to explore how and when Canadians consume information to make travel decisions;
- Evaluating which approach is best to provide assistance to Canadians;
- Keeping Canada at the forefront of delivering its consular mandate;

¹ Overview of Canadian Outbound Travel, Tourism Intelligence Network (<http://tourismintelligence.ca/2016/12/07/overview-of-canadian-outbound-travel/>).