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Executive Summary

CONSULAR POLICY AND PROGRAMS

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I. Executive Summary



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/>).



- Providing the Consular Bureau with direction to adapt to a changing environment; and
- Informing GAC of Canadians' attitudes and behaviours to international travel safety.

Results of this research will inform recommendations that will support government priorities while also benefitting Canadians. This research will allow GAC to develop an improved consular strategy that supports a better client experience for Canadians and safety for those abroad.

B. Methodology

This study was undertaken as a hybrid, qualitative-quantitative, research program. This mirrors the approach taken in 2007 and 2008, with some modifications in terms of defining the target audience for the research.

As a first phase, a series of 12 focus groups were conducted, each two hours in length, in five centers across Canada – Halifax, Toronto, Calgary, Montreal (in French) and Vancouver. Ten of the groups were conducted among the travelling public (2 in each center), defined as those aged 18 years and older who have travelled in the past two years and/or who plan to travel internationally within the next year. Groups were split by age, with one group undertaken among those aged 18 to 34 years and a second group in each location with those aged 35 and older. All groups comprised a mix of participants by gender, family composition, educational levels and household income. Care was also taken to ensure that the groups included participants having travelled to, or planning on travelling to, diverse destinations. In two of the five locations (Toronto and Montreal) an additional group was conducted with travel professionals (2 groups in total).

The reader should note that findings from qualitative research are not statistically reliable, and unlike national surveys, cannot be extrapolated to the broader target population with any degree of statistical validity. While participants are recruited in a manner that takes into account representation by key demographic characteristics, the groups cannot be positioned as representative of the broader travelling population. Nevertheless, focus groups are a highly effective research tool and remain a suitable methodology for the purpose and objectives of this research.

As the focus groups were being organized and completed, arrangements were also being made to conduct the quantitative phase of the research. This phase of the study involved face-to-face intercept interviews inside international departure areas at the Toronto, Vancouver and Montreal international airports. Interviewing was conducted on different days and times in each airport, depending on the blocks of time which were made available by each airport authority. A total of 846 interviews were completed with the travelling public between March 12 and April 2, 2018, and the average length of interview was approximately 15 minutes.

The survey was designed to target Canadians who were 18 years and older and who were travelling internationally. Additionally, soft quotas were established to ensure the sample included a cross-section by gender, age, and travel destination. Quotas were also put in place to ensure a sufficient number of responses from Francophones transiting through the Montreal Airport.

Readers should note that respondents to this survey are travelers flying by air to international destinations, based on soft quotas set and outlined above, and transiting through three specific airports (Toronto, Montreal and Vancouver). A convenience or availability sampling approach was utilized which is a common sampling technique employed to reach highly targeted or specific audiences such as international air travelers. This sampling method involves reaching respondents wherever they can most conveniently be found (i.e., airports). As such, the results are not statistically projectable to all Canadians traveling internationally.

More details on both the qualitative and quantitative methodologies can be found in the Objectives and Methodology section of this report. The research instruments, including the recruiting script, moderator's guide and the airport intercept survey, are contained in the Appendix.



C. Key Findings

1. The Current Trip, General International Travel Patterns and Experience

- In terms of the current trip destination, soft quotas were administered to make sure that the survey captured a broad spectrum of travellers, by destination. This was done to avoid a high concentration of respondents travelling to the U.S., Mexico and the Caribbean, as would likely have occurred with a more random, representative sampling approach. As such, the results are not necessarily reflective of the broader international travel patterns of Canadians. Close to one-in-five surveyed indicated they were travelling to the U.S. (20%) and Mexico/The Caribbean (22%). Just under two-thirds (60%) were travelling to other destinations mostly in Europe and Asia, including China (10%), France (7%), and the United Kingdom (7%). Smaller numbers were travelling to places such as Germany, Italy, India, Japan, Hong Kong and the Philippines (about 3% in each case).
- A significant share of respondents said they were travelling abroad on their own. Although a slightly higher proportion of men travel solo, this was also true for over one-third of women. Those travelling by themselves also tend to be somewhat younger. By contrast, people aged 55 and older were most likely to be travelling with other family members.
- In the 10+ years that has elapsed since the previous surveys were undertaken, the 2018 findings reveal that, overall, Canadians appear to be travelling abroad with greater frequency. While in 2008 just over one-quarter (27%) of respondents said they had taken 6 or more trips abroad within the last 5 years, half (50%) now say the same in 2018.
- Moreover, and as noted in other travel statistics, the more popular international travel destinations continue to be the United States, Mexico/the Caribbean, and Europe. In 2008 we noted an increase, relative to 2007, in those who cited having travelled to the U.S. and the 'sun' destinations in the last 5 years. The uptick in travel to the U.S. between 2007 and 2008 may have, in part, been driven by increased cross-border business activity. In 2018, this pattern holds. Although, overall, a small percentage of those surveyed (11%) indicated that the majority of their travel over the last 5 years was for business, this group was more likely to report having travelled to the United States.
- Beyond the U.S., destinations travelled to are also a factor of where respondents reside in Canada. This is understandable given that some destinations are easier and less expensive to travel to depending on the point of origin. For example, the 2018 results show that the Caribbean is a more popular destination among residents of central and eastern Canada, while those on the west coast are more likely to have travelled to Mexico and Northern Asia.
- Most respondents would likely consider themselves to be reasonably 'experienced travellers.' Many of those surveyed were familiar with their destination in that they had travelled to it at least a few times before. A relatively small proportion, under one-third (28%), had never travelled to their current destination before. And, fewer than one-in-ten indicated this was their first trip abroad (4%), or that they had not travelled abroad in the last 5 years (3%).
- As in 2008, the average length of trips is generally about 1 to 2 weeks, although over one-third of those travelling abroad typically plan trips which take them overseas for a period of 3 weeks or more. At the same time, we also note a slight increase in those indicating their trips abroad are usually under a week (from 3% in 2008 to 9% in 2018). Although a higher proportion of shorter trips are taken by business travellers, comments from participants in the focus groups suggested that there is a segment of the travelling public who are more inclined to plan their trips in a highly spontaneous fashion, hoping to take advantage of 'last-minute' deals for airfare and accommodation.



2. Trip Planning and Preparation

- The planning window for a trip abroad can be anywhere from 1 to 2 weeks to upwards of 3 months, depending on the destination, nature and purpose of the trip. Travellers rely on a variety of resources when planning and booking – online travel reservation services, especially other travellers comments, friends and family experience, airlines, and travel agents. It is important to note that while many travellers undertake much of their research online, using booking services such as Expedia and TripAdvisor (the latter was mentioned more often in focus groups than it was in the survey), there is a segment of travellers (29%) who continue to rely on the services of travel agents. While the extent to which travel agents utilize the resources of www.travel.gc.ca, receive travel alerts, and share information about safe travel varies, they remain a key conduit through to their clients and the travelling public in general.
- For the most part, the degree to which travellers prepare for their trips and the steps taken in planning international travel are fairly consistent, regardless of the nature or purpose of the trip. Notably, the results for 2018 show that travellers are generally taking more steps to prepare for a trip abroad to a destination with which they are not familiar than they were in 2008. In particular, many more now arrange for health or travel insurance (almost double what was found in 2008, from 27% to 49%), and of those who do, almost three-quarters are familiar with the terms, conditions and exclusions of their coverage. Overall, these results suggest that international travellers are paying more attention to these types of details. There are, however, significant age differences in that this practice is more common among people aged 55 and older.
- In a broader context, and on a somewhat cautionary note, we found a slight uptick (7-point increase since 2008) in the number of travellers who now say that it's impossible to anticipate what might arise when travelling abroad so their general approach is to handle situations as they arise, and a corresponding decline in those who say it's more important to be prepared. Overall, however, the majority (58%) prefer to be prepared. Again, however, views are age dependent: younger people, and those travelling with friends are more likely to take the approach of addressing situations when they come up, while older people and those travelling with family members are more inclined to want to be prepared.
- In both the survey and focus groups, travellers indicated that their first order of business when planning a trip is usually booking flights and accommodations, in addition to checking the weather, and giving some thought to the types of activities and attractions they may wish to incorporate into their itinerary. Since cost is a key consideration, travellers tend to focus first on those items which, combined, represent the largest share of the overall cost of the trip. In focus groups, we heard that for many travellers it is important to at least have the first night's accommodation booked when travelling abroad. This provides a sense of reassurance upon arriving at the destination. After that, some travellers seem prepared to 'play it by ear,' an approach which is more common among younger travellers and those who tend to book on the spur of the moment.
- Additionally, this year's results show an increase in the number of travellers who say they check travel advisories when travelling to a destination with which they are not familiar (up from 20% in 2007 and 21% in 2008, to 31% in 2018). Nevertheless, it is important to note that this particular step remains a common practice for just under one-third of international travellers. In focus groups, participants did flag safety and security issues among the considerations when selecting a destination and planning a trip abroad, but the majority tend to rely on information and recommendations from friends and family who have been to the location for advice, Google searches and online tourist information provided by the regional or state government or tourist bureau to put context around any official information they receive. It was clear that many participants tended to land on a Government of Canada travel advisory inadvertently, while conducting their search, rather than having actively sought it out.



- Less planning is generally involved for those travelling to the U.S., Mexico or the Caribbean and, in particular, there appears to be less concern about safety and security issues with the exception of those travellers who are accompanied by younger children. Focus group participants were of the view that, should an issue arise, they could more readily return to Canada from these destinations. The same approach or mindset exists for those travelling to destinations where they have friends or family or where there are no significant language barriers.

3. Awareness, Use and Interpretation of Travel Advisories and Other Government Services for Those Travelling Abroad

- As noted above, the Internet, and specifically Google, is the predominant source for information on safety and security when travellers are considering a destination with which they are less familiar. Many are generally, although not specifically, aware of **travel advisories**. However, in focus groups, it was clear that many travellers are less likely to seek out this information than they are to rely on what they hear in the news about destinations where events (i.e., political or civil unrest, criminal activity, natural disasters) may preclude their travelling to a particular country or region. Travel professionals refer to the travel advisories more regularly and some have signed up for alerts.
- Some degree of confusion exists with regards to the source of travel advisories – while the majority believe these are produced by the Government of Canada, a significant proportion of travellers (about two-in-five) believe that these advisories are put out by the destination country, travel agents, tour operators and travel guides, among other sources.
- Findings from the survey and focus groups are consistent in terms of the impact of travel advisories on travellers' plans. Very few have changed their plans or say they would be likely to change their plans, especially once they have booked. Additional feedback in focus groups underscored that many feel it is in the Government's interest to take a more conservative or cautious approach when it comes to assessing risk. This is not necessarily a serious criticism of Government as most focus group participants believe the Government should highlight minor as well as major risks for Canadians travelling abroad. Nevertheless, the tendency is to view the information provided in travel advisories with some degree of skepticism and to take additional steps to gather more information about the nature and extent of any risk.
- At the same time, travellers do interpret the term 'travel advisory' as meaning *strong guidance* or a *recommendation to avoid travel to certain locations*, although about one-quarter of those surveyed took it merely as *advice*. That being said, when participants in focus groups were given an opportunity to review a sample travel advisory (i.e., Lebanon), the ensuing discussion did ultimately generate more mixed views regarding the interpretation of the risk assessment and the impact of a travel advisory. While many would seek additional information from other sources (i.e., people in the region, others who have travelled to the destination), there was a greater tendency to rethink travel plans based on a risk assessment indicating travellers should either exercise a high degree of caution or avoid all travel.
- With respect to the content and format of travel advisories, focus group participants had a number of suggestions to offer. In general, many feel that government websites tend to be cluttered and text-heavy, although, at the same time, they appreciate the extent of information and coverage of various topics. Nevertheless, incorporating more visual cues or icons would help the user to more quickly sort through the information and find what is relevant. A strong recommendation to include a map of the region/country was put forward as many find it difficult to understand to what extent an advisory applies to part or all of the region, especially when it is a country or region they have little knowledge of.



- Based on comments made in focus groups, few travellers appear to be aware of the free service known as **Registration of Canadians Abroad**, which allows the Government of Canada to notify travellers in case of an emergency abroad or a personal emergency at home as well as for the traveler to receive information before or during significant incidents such as a natural disaster or civil unrest. Although the survey results indicate that those who are working or volunteering abroad are more likely to use this service, overall, very few travellers registered for their current trip or indicated they generally do so when planning a trip overseas. While awareness of this service was higher among travel professionals, it was by no means ubiquitous.
- Interest in the Government of Canada's **Travel Smart App** is relatively high, particularly among the group aged 35 to 54, but also younger travellers and those travelling with minor dependents. Participants in focus groups, including travellers and travel professionals, while unaware of the App, were enthusiastic when provided with additional information. As most do travel with a smart phone and utilize Wi-Fi in cafes, restaurants and hotels, there was interest in being able to access information and receive updates on an as-needed basis. Travel professionals were also positively disposed to the App and, with more information, would likely promote it to their clients.

4. Familiarity with and Expectations of Consular Services

- While few travellers are directly familiar with Consular Services, and very few of those surveyed (or in focus groups) have had an actual interaction with Consular Services, most believe they could readily contact the Canadian Embassy or Consulate if the need arose. Although in the focus groups, many participants indicated they would attempt to troubleshoot the majority of issues themselves, in the survey over half (59%) said they would turn to the Canadian Embassy or Consulate for assistance, typically by telephone or in-person, depending on where the office was located. Contacting the local police, calling home or seeking assistance from friends, family or the hotel staff in their location were also mentioned as options.
- Travellers are not broadly familiar with the full range of services and support offered by Consular Services. In both the focus groups and the survey, travellers were most likely to believe that the main function of Consular Services is to assist travellers who have misplaced their passport or had it stolen, as well as to provide assistance to travellers affected by a natural or civil disaster. With further prompting, travellers also believe services and support are available through the Embassy or Consulate to those who have been detained by local authorities. Notably, however, about one-quarter or more also felt that Consular Services would provide assistance to travellers of a general nature about the country in which they were travelling or about Canada, offer a safe haven if required, provide document services and/or notification if there has been a death in the family.
- The format for the focus groups created an opportunity for a much more in-depth discussion about travellers' expectations with respect to Consular Services' standards and quality. Expectations are high that services will be available 24/7, and that they should be easily located and accessible across multiple channels (telephone, in-person, e-mail) as well as broadly available to Canadians regardless of their predicament or the extent to which the traveler him or herself may be responsible for the circumstance in which they find themselves. There is an expectation that Consular officials will be able to quickly triage their issue and direct them appropriately. Travellers also expect officials to behave in a professional and empathetic manner – without necessarily pre-judging or pre-determining fault. In particular, they expect service to be delivered in a timely fashion. In the most likely situation of a lost or stolen passport, most feel this should be resolved within a few days or, at most, a week. At a minimum, travellers assume that Consular officials will begin to make some headway on their issue almost immediately, even if an actual resolution takes several days.



- Some groups of travellers are clearly viewed as being more vulnerable than others and, thus, may be more likely to find themselves in situations where they require assistance from Consular Services: younger, inexperienced travellers, the elderly, women and disabled people. At the same time, the general consensus is that all Canadian travellers should expect to receive the same level of service from Consular officials, although there may be a need to provide more targeted information to these vulnerable groups in order to make them more aware of and alert to risks.
- The Government of Canada and Consular Services are rated positively on key performance metrics. Just over half of respondents rated the government positively (51% gave a rating of 7-10 on a 10-point scale) in terms of the services and support Canadians receive from the Government when they are travelling abroad, although one-third (33%) did not know enough to be able to rate the Government in this regard. A similar proportion of travellers have reasonably high levels of confidence (57% gave a rating of 7-10 on a 10-point scale) that they would be able to quickly access a Consular official if needed.

D. Conclusions and Recommendations

The findings from the 2018 study underscore continued opportunities to inform and educate Canadians about safe and smart travel when they are planning a trip abroad. In particular, efforts should be made to raise awareness of the Government of Canada resources that exist, including travel advice and advisories, the Registration of Canadians Abroad database and the Travel Smart App. Overall, travellers and travel professionals are positively disposed to all of these tools or resources, but are simply unaware of their existence.

To the extent that more content and interactive tools can be made available as part of the Travel Smart Mobile App, and then promoted widely, there is likely to be reasonable uptake especially among the group of younger (and typically less experienced) travellers. Travellers want information and resources at their fingertips.

Social media channels in particular provide a more direct route to connect with and inform specific groups of travellers about safe travel tips and information, and data shows that penetration and use of these channels is likely to grow. Recent statistics indicate that, “by the end of 2017, approximately 22.7 million Canadians had a social media account, a number that has grown by 300,000 annually for the past 2 years ... 64% of Canadians have an account on a major social network (Facebook, Twitter, LinkedIn, YouTube or Instagram) ... two-thirds of Canadian social media users use their accounts every day.”² Given these trends, the opportunities for public sector and government officials to engage with a broad spectrum of the public and various online communities, including travellers, has been and is likely to continue growing.

Any awareness-raising activities should keep in mind specific segments of travellers – younger, inexperienced, those travelling alone, the elderly and disabled persons, among other groups such as those travelling with minors – as well as the ways in which travellers and travel professionals are now undertaking much of their travel research, most of which is conducted online. Promotional strategies should incorporate a significant online component, targeting sites such as TripAdvisor and Expedia, and other online booking services.

Travellers are, in general, fairly self-sufficient, but this may lead to a sense of over-confidence. Few anticipate that they will find themselves in a situation where they may need assistance from the Government of Canada while they are travelling overseas and many believe that they could readily find and locate Consular Services if assistance was required. Travellers need to be reminded of the simple steps they can take to ensure their trips are safe. They also need to be reminded that the same steps apply regardless of the length of their trip, the purpose or the destination.

² Canadian Social Media Stats (Updated 2018). Posted Jan. 24, 2018 (<https://www.sherpamarketing.ca/canadian-social-media-stats-updated-2018-471>).



There are also opportunities for further outreach to travel professionals, specifically at trade shows or through their associations to ensure that they are effectively utilizing and actively promoting Government of Canada resources to their clients. Similarly, it is important to consider an outreach strategy to tour operators and those offering vacation packages or 'all-inclusive' deals given their popularity and the fact that some travellers book these types of trips quite spontaneously and are, therefore, even less likely to think about safety and security considerations.

Travellers expect and believe they will receive timely and appropriate emergency consular assistance should they find themselves in some sort of distress while they are abroad. Raising awareness of the 24/7 assistance that is available to Canadian citizens travelling overseas would be reassuring, while at the same time it is important to ground any messaging within the context of 'responsible travel' to ensure that Canadians remain aware and vigilant of their personal responsibility.

MORE INFORMATION

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To obtain more information on this study, please e-mail Kristin.Plater@international.gc.ca.

Statement of Political Neutrality

I hereby certify as Senior Officer of *The Strategic Counsel* that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Communications Policy* of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed:

Donna Nixon, Partner