

2024 GLOBAL TRAVELLER RESEARCH PROGRAM

AUSTRALIA HIGHLIGHTS REPORT



Canada



Yellow Knife Northwest Territories



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STUDY OVERVIEW: AUSTRALIA MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in English, with sample being sourced from a nationally established panel.

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

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.



Timing of Fieldwork

**November 19th –
December 2nd 2024**



**Geographical Definition
for Qualified Trips**

**Outside of: Australia,
New Zealand and the
Pacific Islands**



Sample Distribution

Sample distribution:	National
Highly Engaged Guest (HEG) Audience:	1039
Other travellers:	471
Total sample size:	1510

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



Key Insights



Canada continues to be a leading international destination among Australian travellers, with next 2-year immediate potential for Canada being 3.7M



Potential visitors to Canada are more likely to consider a visit during the Summer months, though there is some interest during Fall and Spring



Travellers are interested in local cuisine, nature walks, and natural attraction



Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors such as safety, the opportunity to relax, and budget



There is a high level of interest in Indigenous culture among Australian Travellers; authenticity, safety and comfort of the destination, cultural significance, and accessibility would increase their interest in Indigenous cultural experiences

MARKET SIZING



Killarney Provincial Park
Ontario



MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

20,129,000 (Total AU Population 18+)

39% Took a Long-Haul[^] Pleasure Trip in the Past 3 Years

44% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years



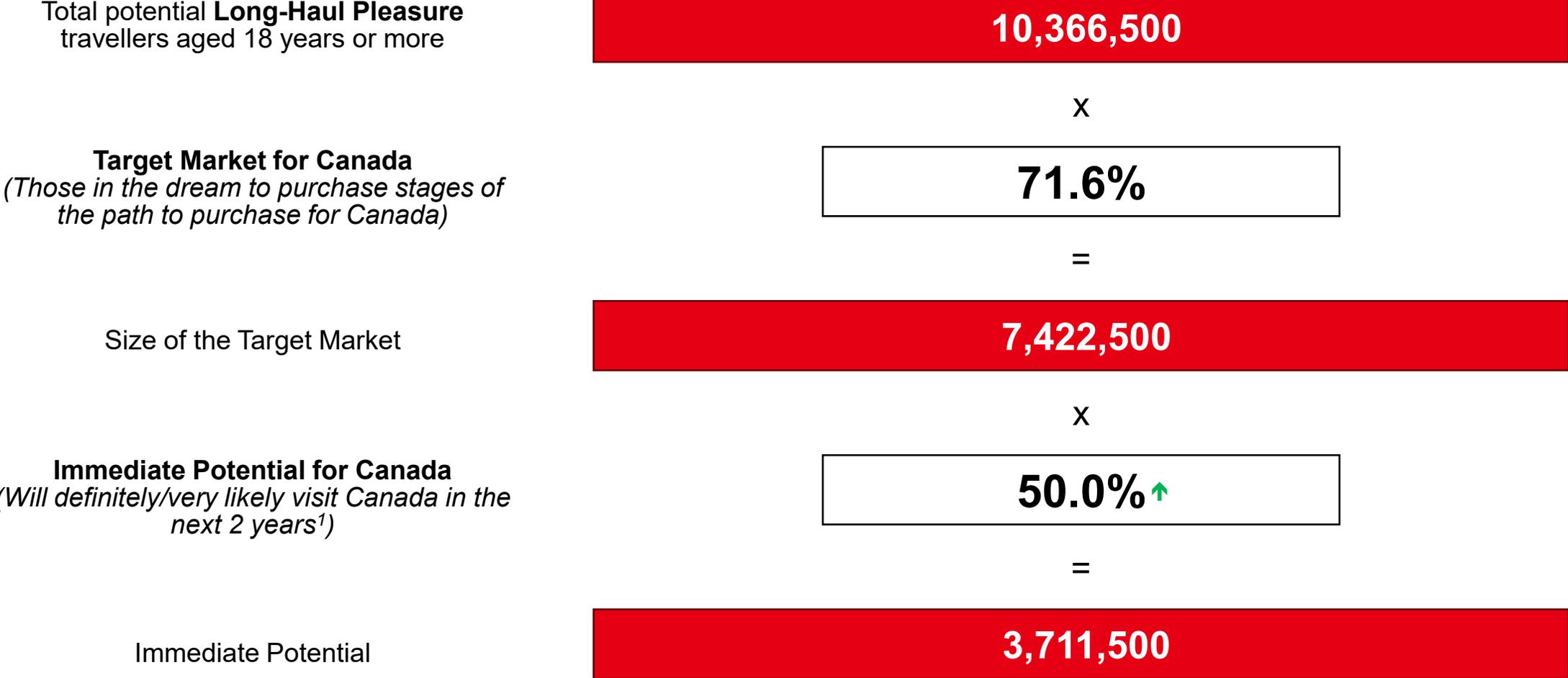
51.5% Incidence Rate

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

10,366,500 (Total Long-haul Travellers)

[^] Long-haul = outside of Australia, New Zealand and the Pacific Islands
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=1080)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



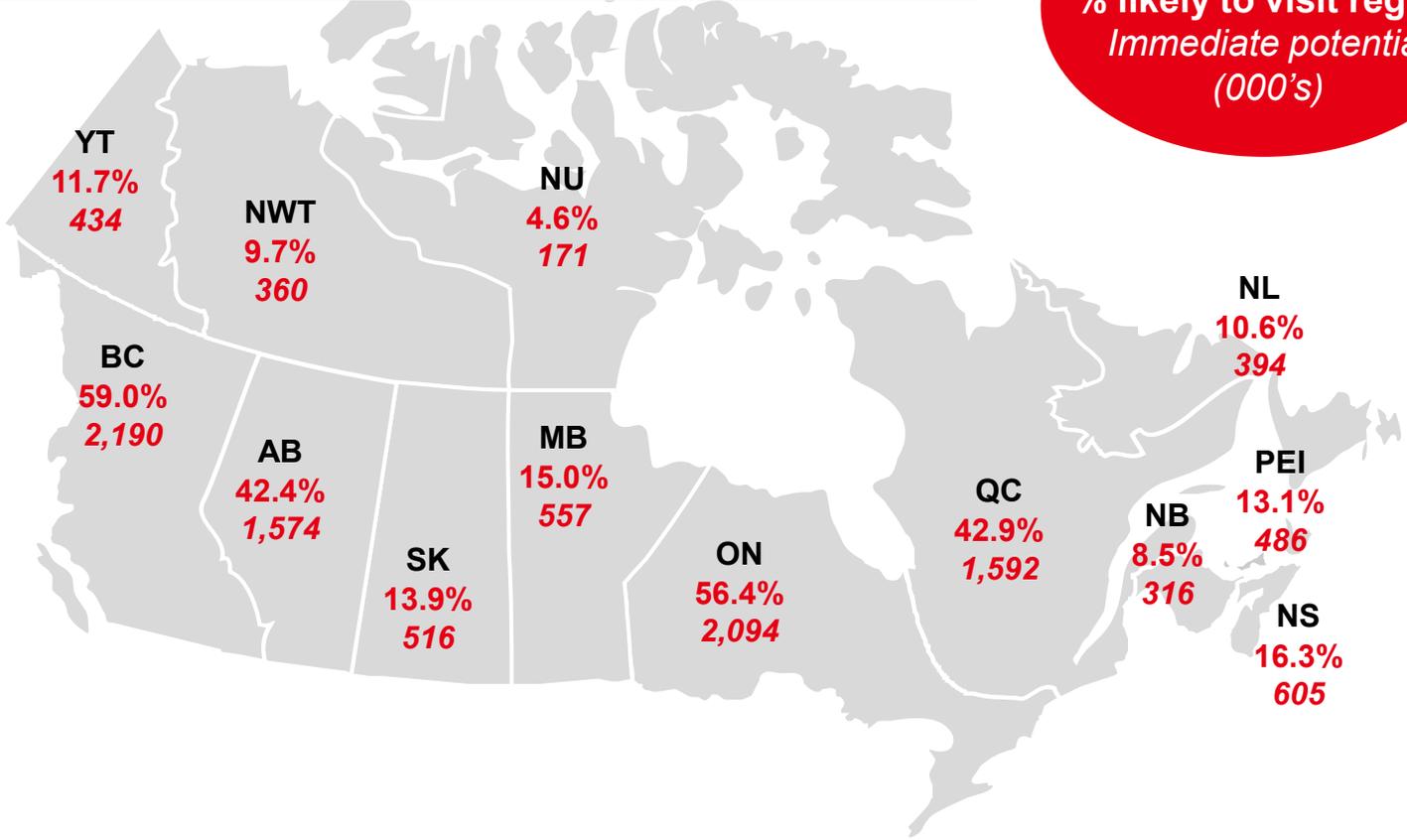
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
 Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1510); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1080)
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
 E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

POTENTIAL MARKET SIZE BY REGION

BC and Ontario have the potential to draw in over 2 million Australian travellers each over the next 2 years.

Immediate Potential for Canada: **3,711,500**

Key:
 % likely to visit region
 Immediate potential
 (000's)



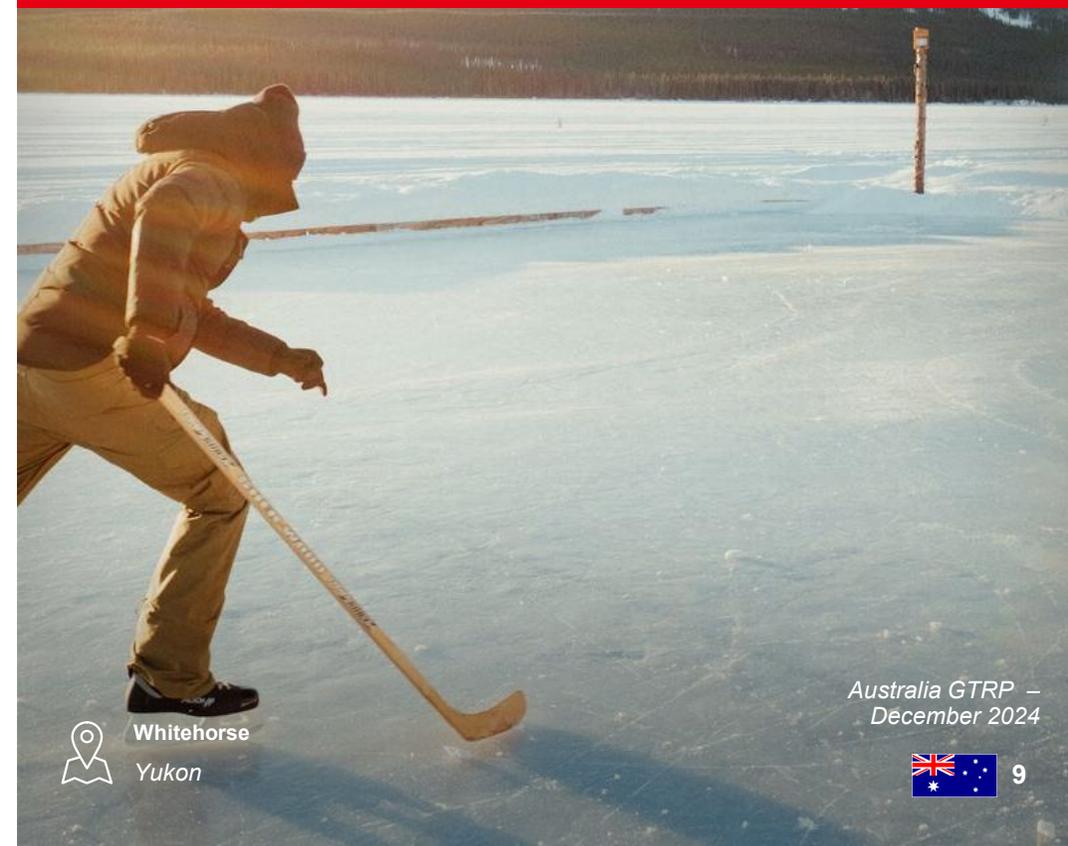
Nunavut

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1080)
 E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	15%	18%	24%	20%
Alberta	10%	13%	17%	14%
Saskatchewan	4%	6%	6%	5%
Manitoba	5%	6%	6%	5%
Ontario	13%	15%	22%	18%
Quebec	10%	12%	18%	15%
New Brunswick	2%	4%	3%	4%
Nova Scotia	3%	5%	8%	6%
Prince Edward Island	3%	4%	5%	4%
Newfoundland & Labrador	3%	3%	5%	4%
Yukon	3%	4%	5%	4%
Northwest Territories	2%	3%	4%	4%
Nunavut	1%	1%	2%	2%

Australian travellers are most interested in travelling to Canada during the summer, though there is some interest during fall and spring.



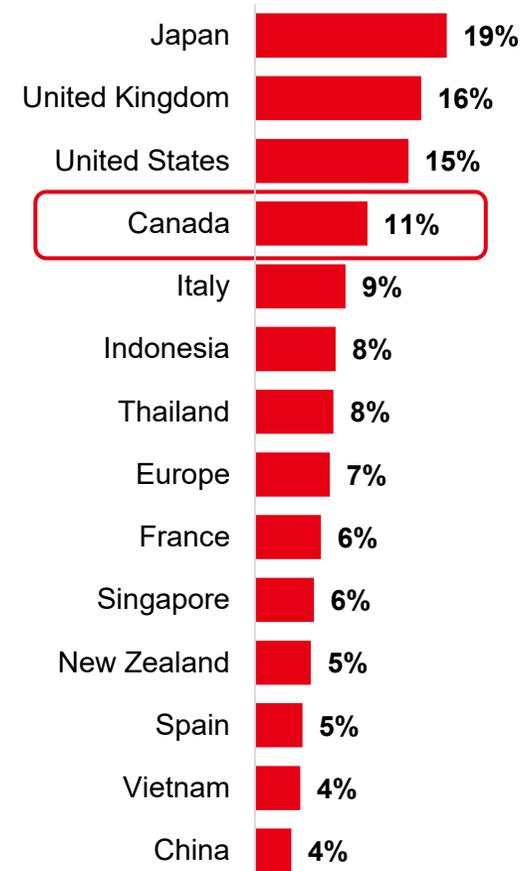
Whitehorse
Yukon

Australia GTRP –
December 2024

CANADA VS. COMPETITORS

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

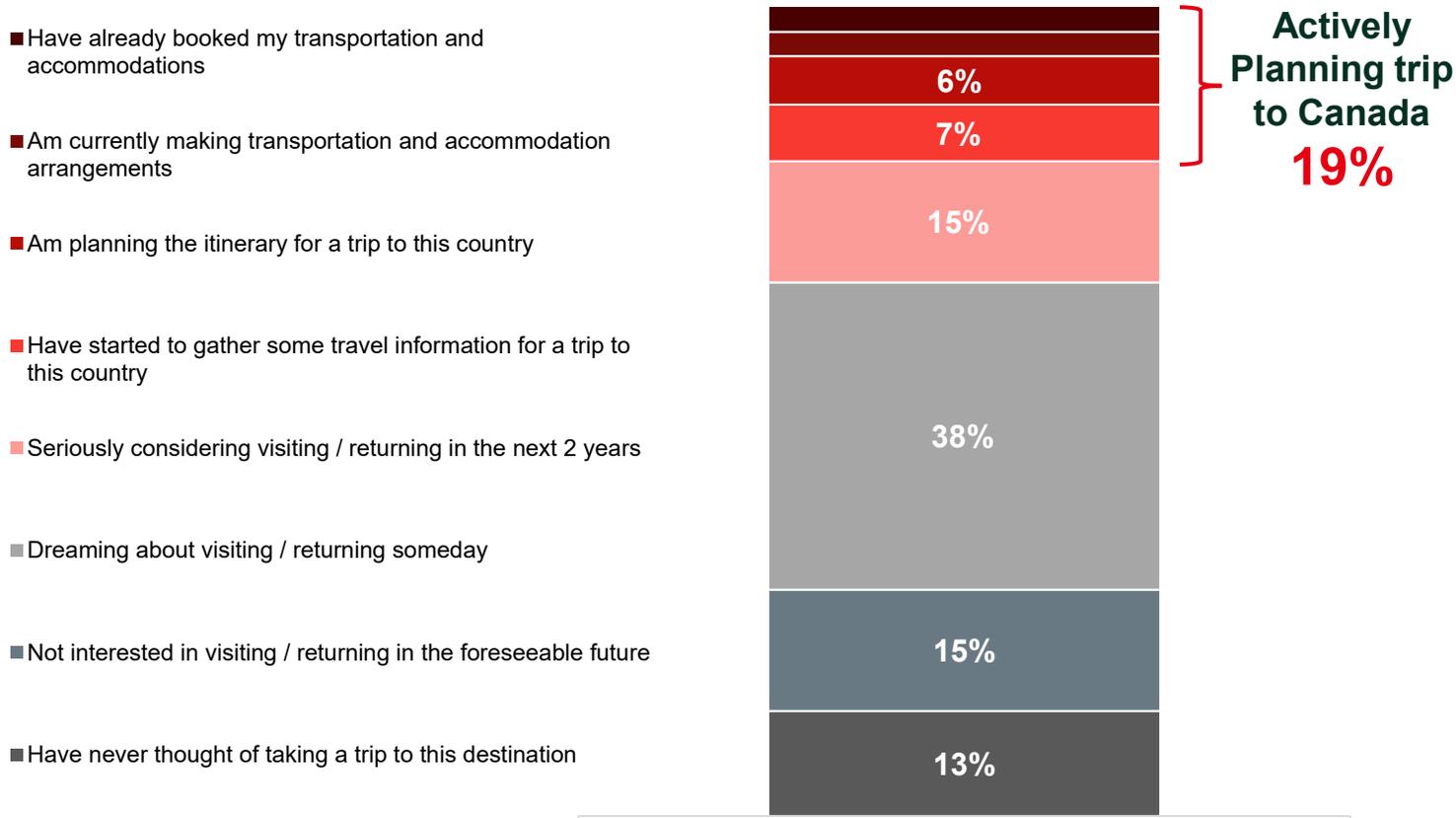
On an unaided basis, Canada is ranked fourth as a destination seriously considered by Australian travellers.



¹Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada). ↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510)
 B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



STAGE IN THE PURCHASE CYCLE FOR CANADA



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

12 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=1510)
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
 (Select one for each)



Nearly two in ten Australian travellers are actively planning a trip to Canada.

Lake Louise
Alberta

Australia GTRP – December 2024



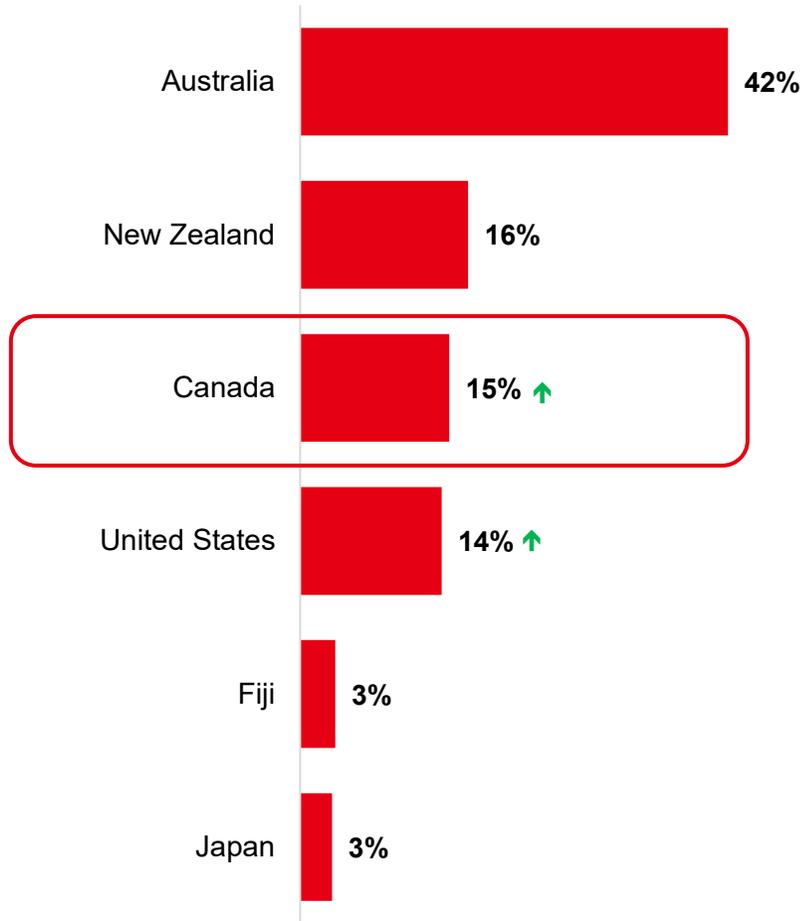
INDIGENOUS TRAVEL



Carcross
Yukon



UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510)

B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Australia, New Zealand and the Pacific Islands.)

[DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



On an unaided basis, Canada ranks third when thinking of Indigenous tourism destinations.



Manitoulin Island
Ontario

Australia GTRP –
December 2024



INTEREST IN INDIGENOUS DESTINATIONS



Over one half of Australian travellers are interested in participating in Indigenous experiences in Canada, with nearly three in ten being very interested.



Kelowna
British Columbia

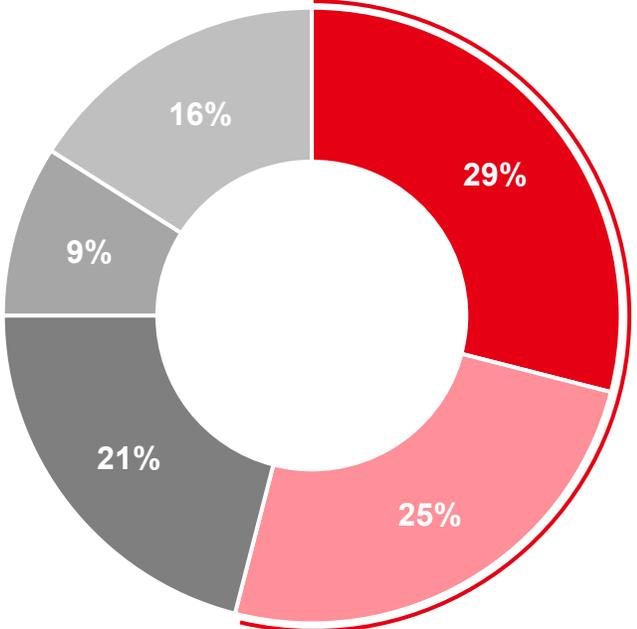
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)
54%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=755)
 C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Authenticity of the experiences, safety and comfort of the destination, cultural significance and uniqueness, and accessibility and ease of travel are the most mentioned factors driving interest in Indigenous cultural experiences.



Victoria
British Columbia

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=755)
 C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

TRAVEL BEHAVIOURS



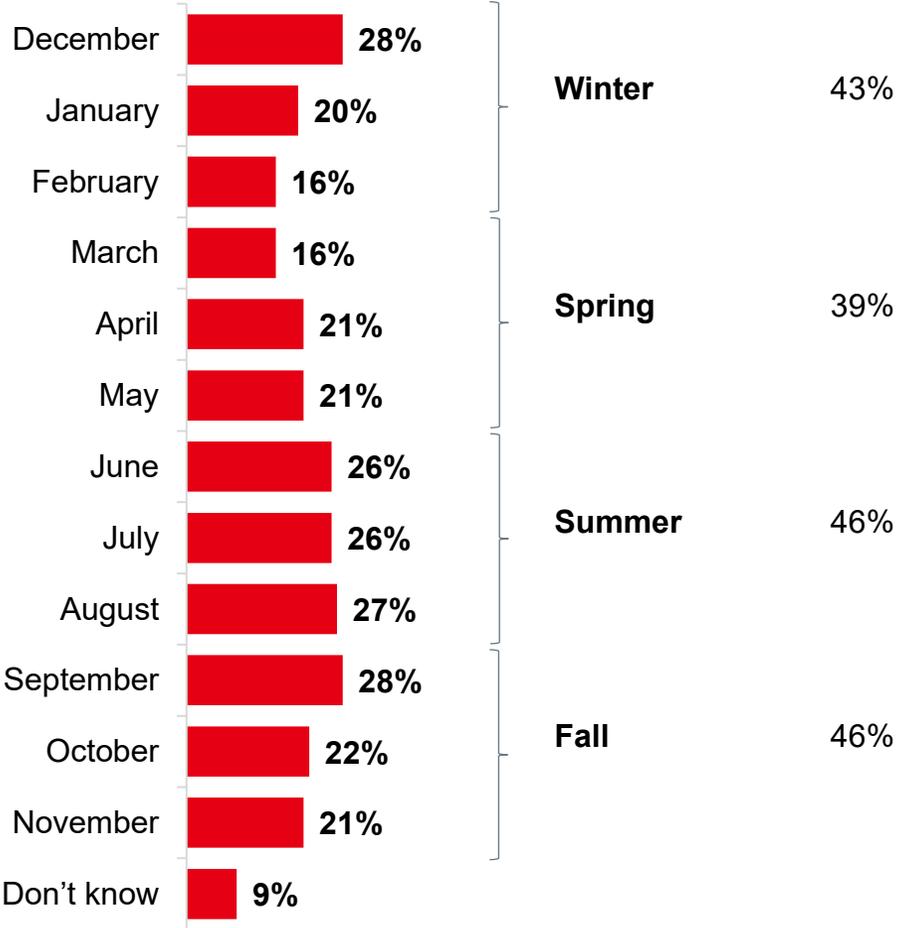
FARINE
FIVE ROSES



Montreal
Quebec



PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS



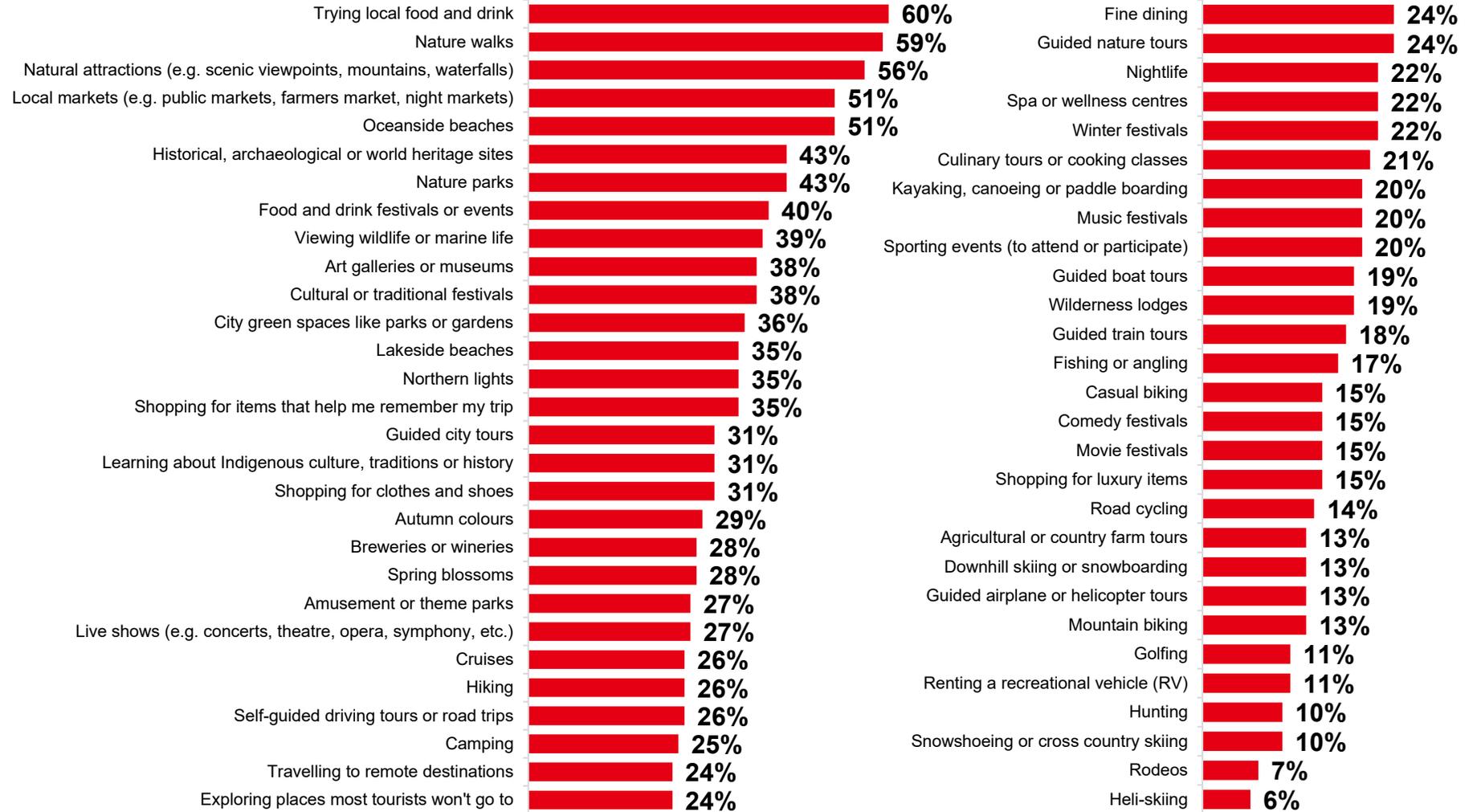
Fall and summer are the most preferred time of year for holiday trips, with September and December being the most popular months among Australian travellers.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510)
 D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

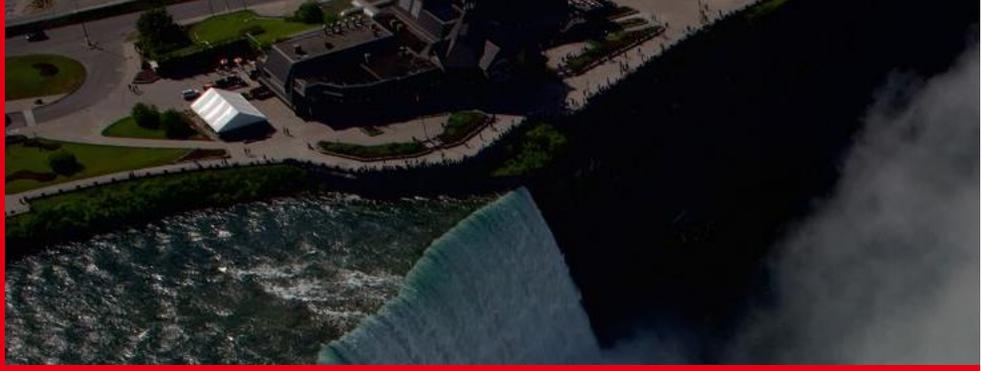
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities when on a holiday include trying local cuisine, nature walks, and natural attractions.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510)
 D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

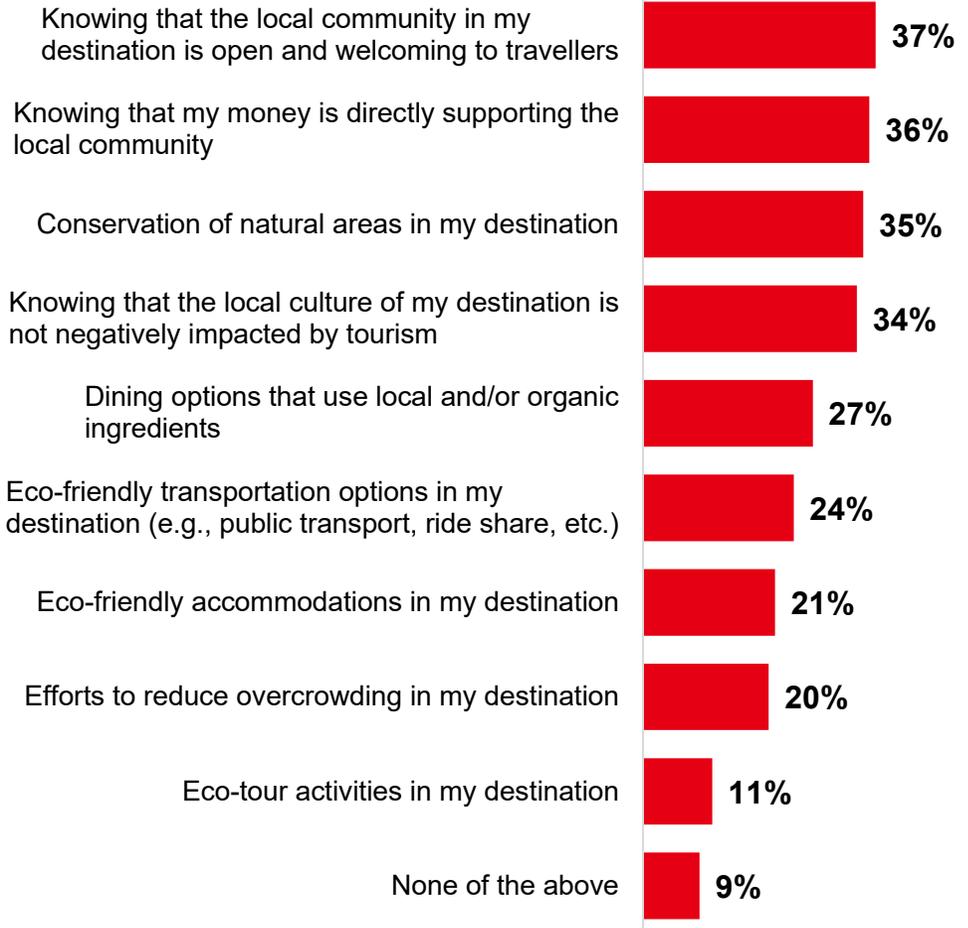
TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS



The most important sustainability efforts are knowing that the local community in my destination is open and welcoming to travellers, knowing that their money is directly supporting the community, conservation of natural areas in the destination, and knowing that the local culture is not being negatively impacted by tourism.



Niagara Falls
Ontario

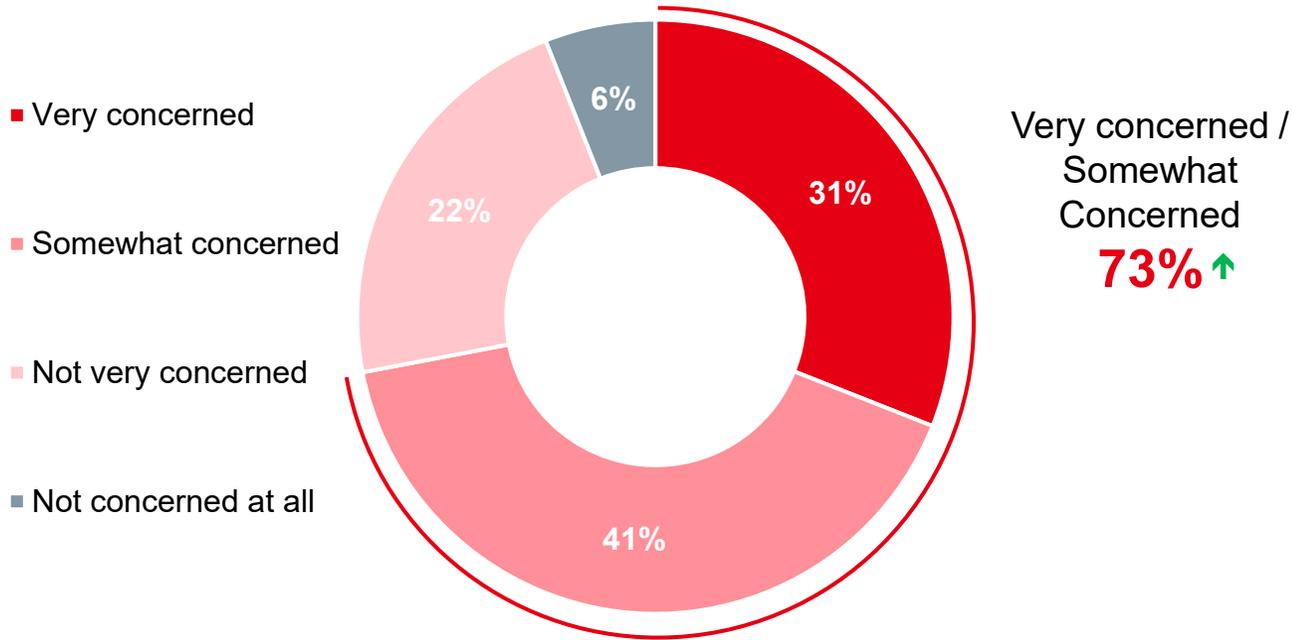


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=775)
 D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



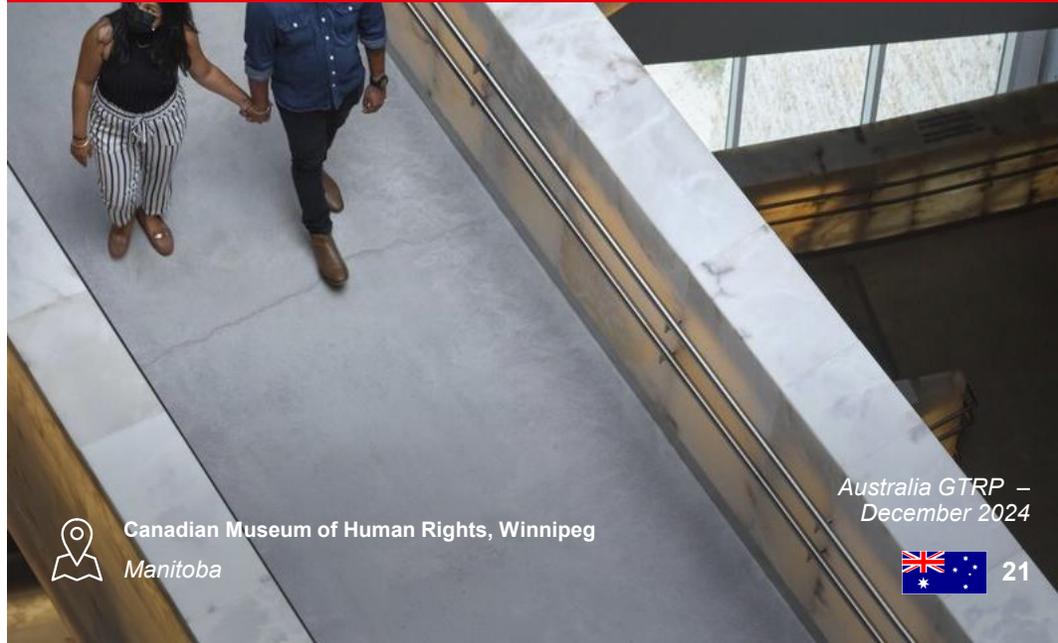
57% state extreme weather events will **significantly or moderately impact** their future travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510)
D10. As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones. How concerned are you about extreme weather events affecting your travel plans?
D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?



Over seven in ten Australian travellers are concerned about extreme weather impacting their travel plans, with almost six in ten stating that extreme weather will impact their future travel decisions.



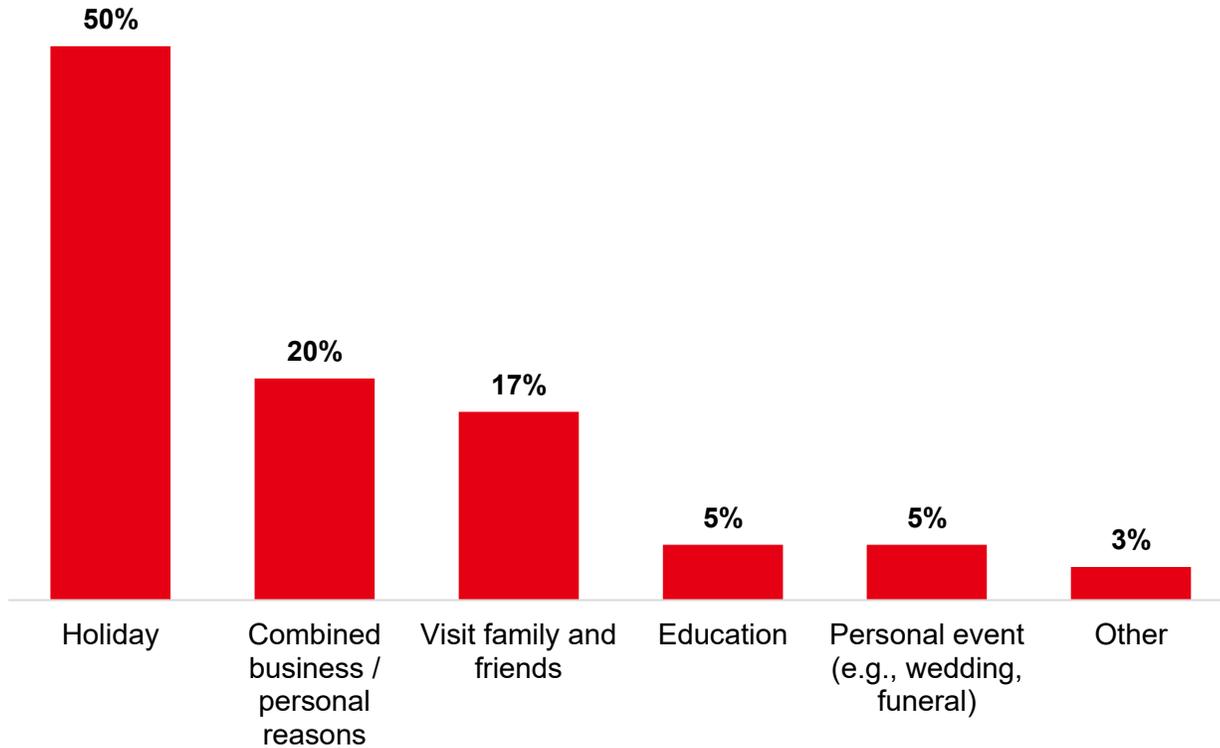
MOST RECENT TRIP



Le Pays de la Sagouine
New Brunswick



MAIN PURPOSE OF RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=227)
F2. What was the main purpose of this trip? (Select one)

One half of Australian travellers to Canada in the past three years were going on a holiday trip.



Nahanni National Park Reserves
Northwest Territories

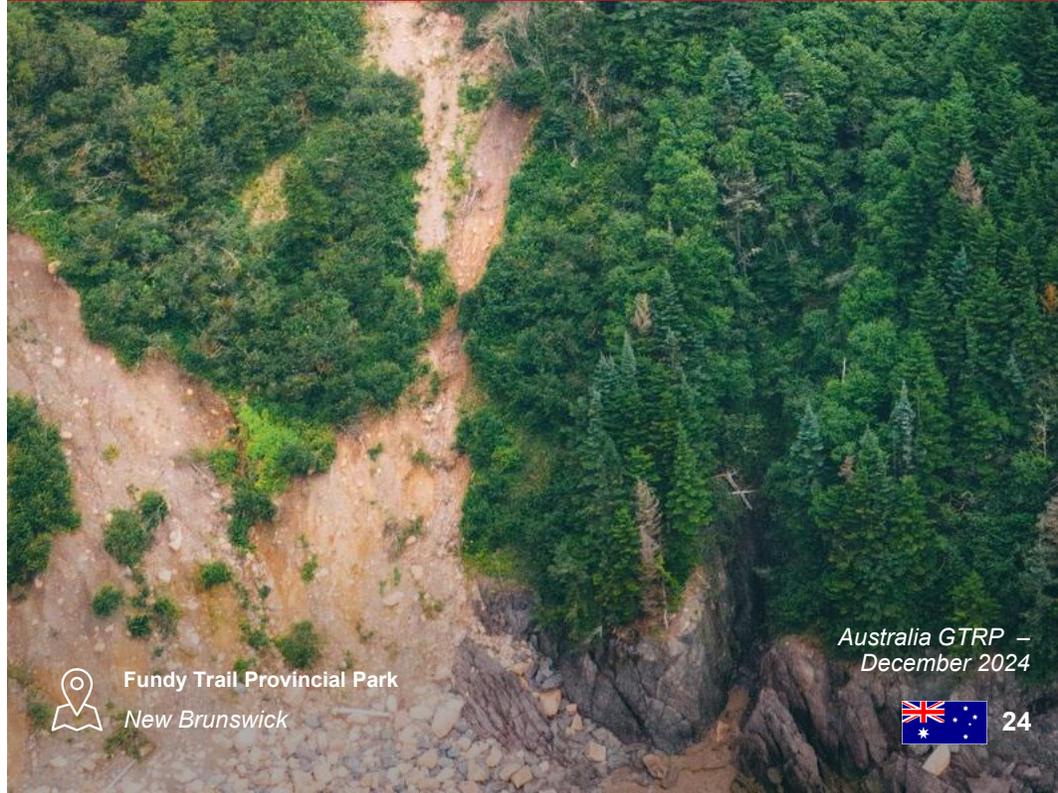
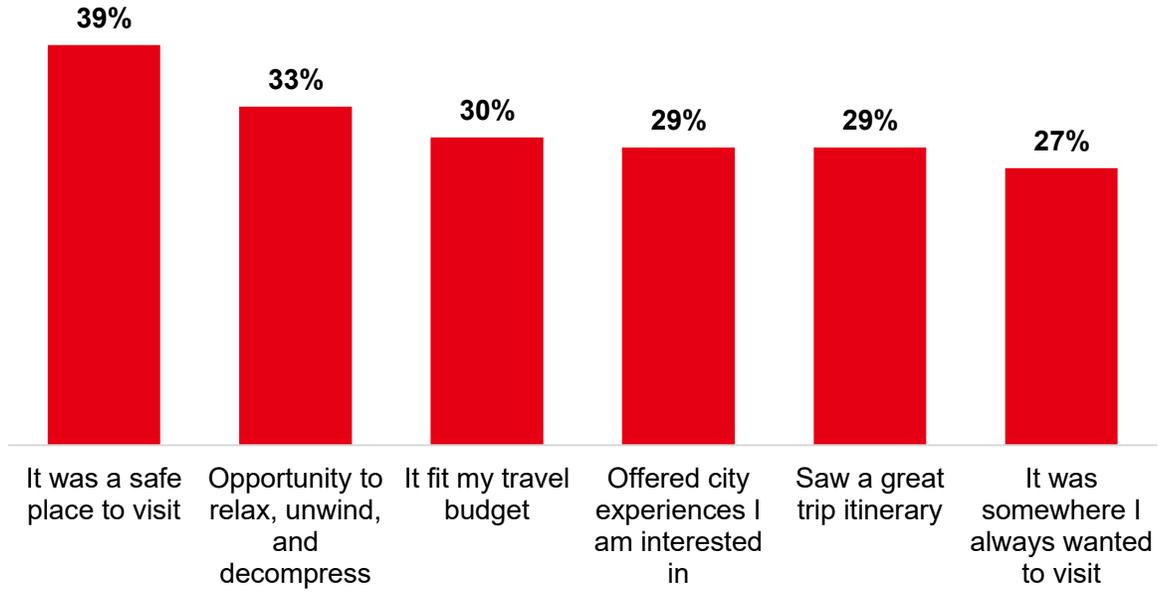
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FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



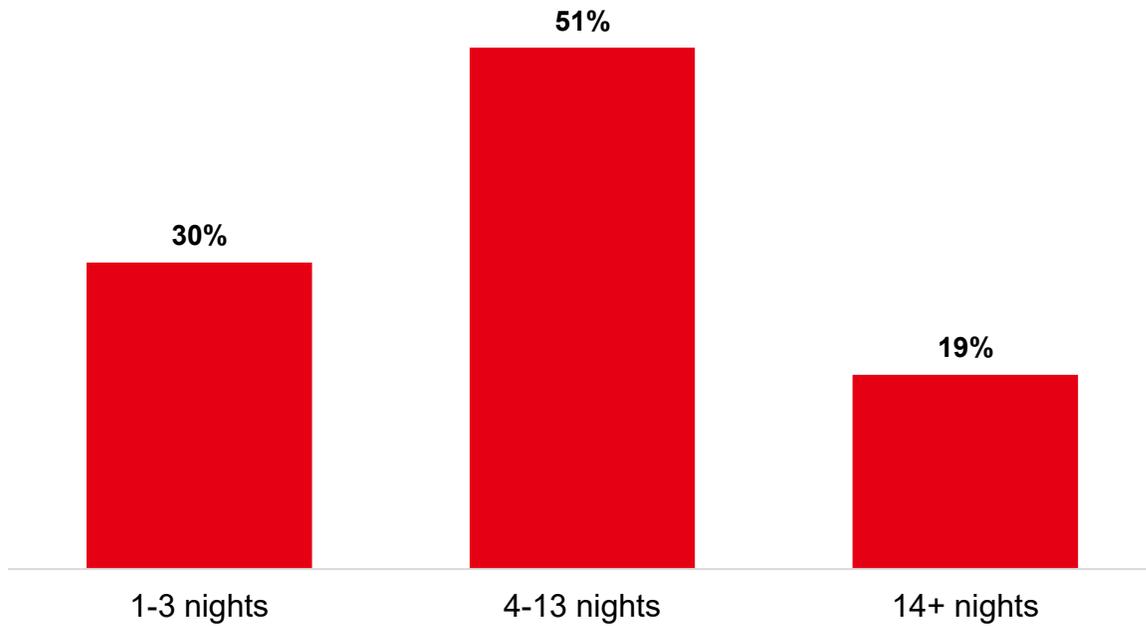
The top factors for choosing Canada for their most recent trip include safety, the opportunity to relax, and fitting in the travel budget.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=114)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

NIGHTS SPENT DURING RECENT TRIP

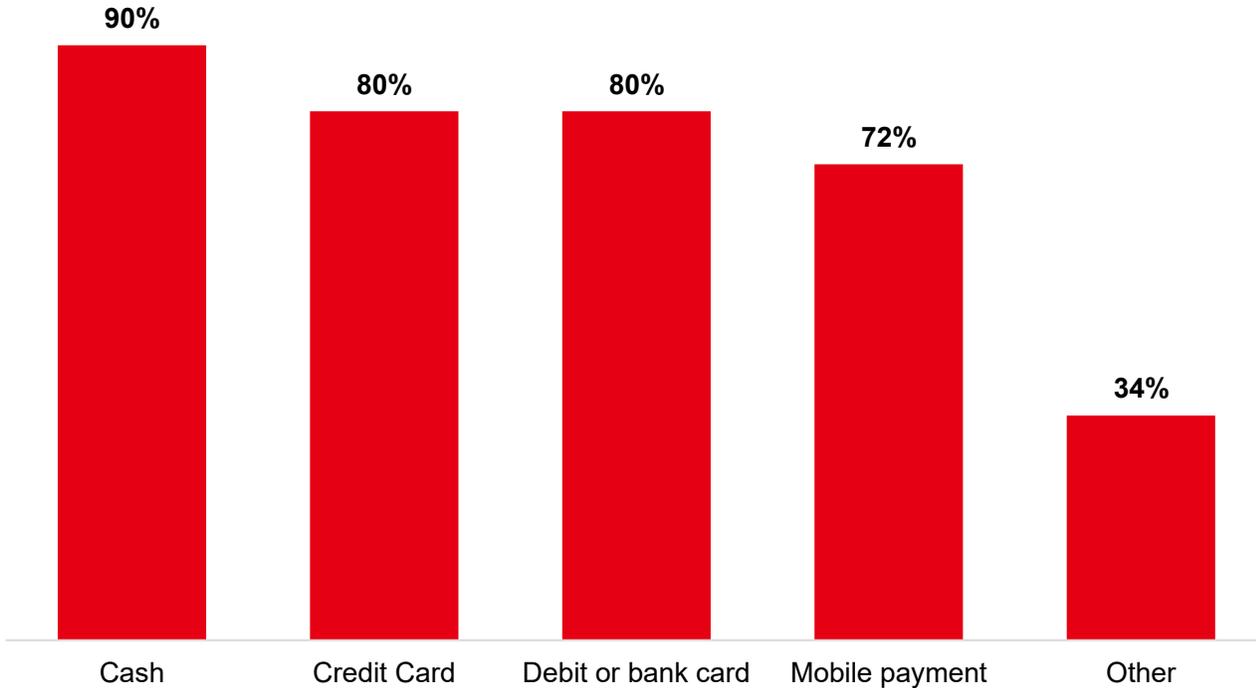
Over one half of Australian travellers to Canada stayed for 4-13 nights.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=227)
F4. How many nights did you spend in this destination?



PAYMENT METHODS FOR RECENT TRIP



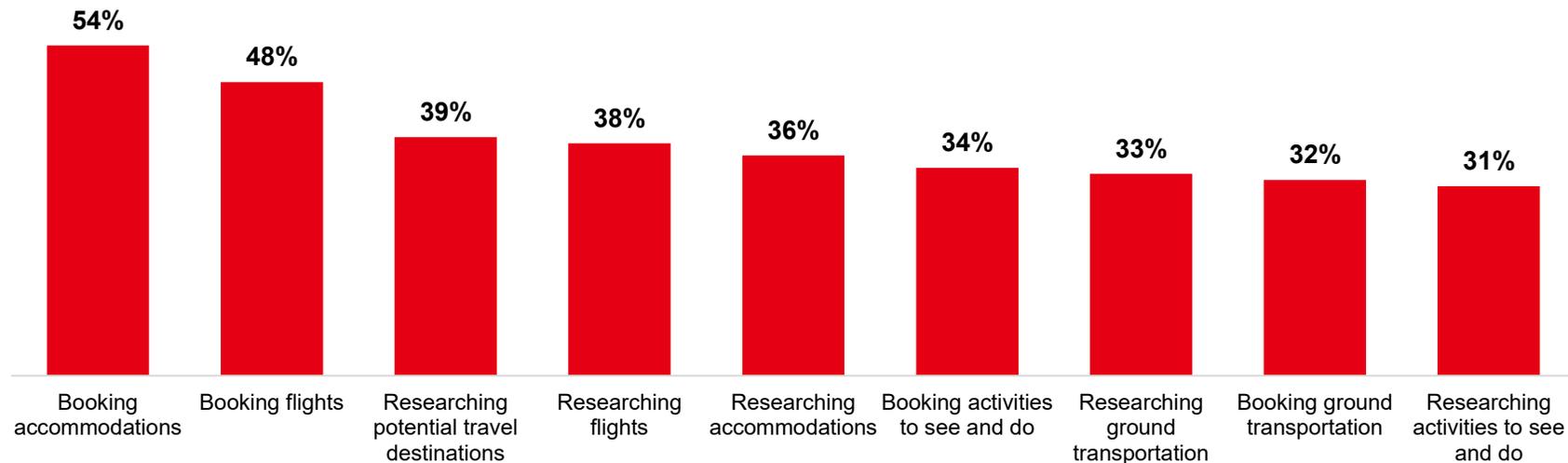
The most common payment methods Australian travellers used for their most recent trip to Canada were cash, credit card, and debit or bank card.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=227)
 F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).



TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

33% used a travel agent



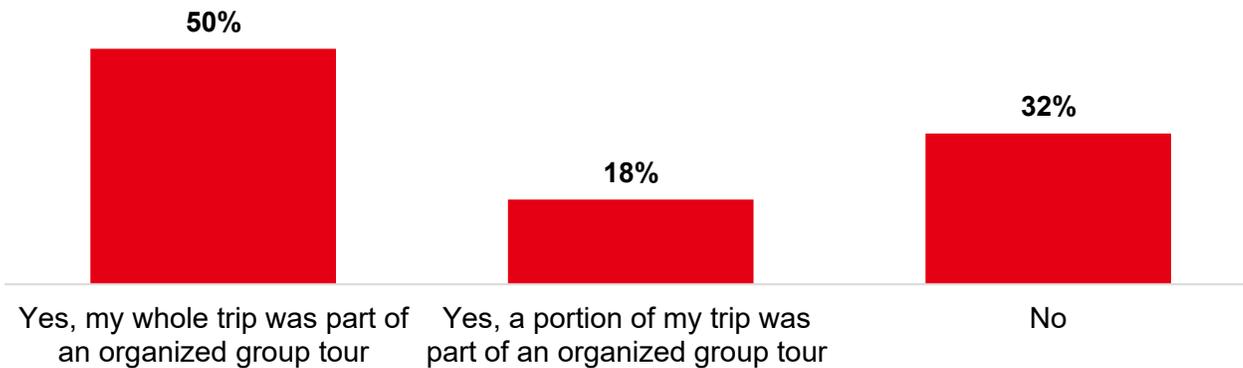
One third of Australian travellers to Canada used a travel agent, most likely for booking accommodations or flights.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=158)

F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Intrepid Travel, they do not include online booking engines like Expedia or Webjet. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

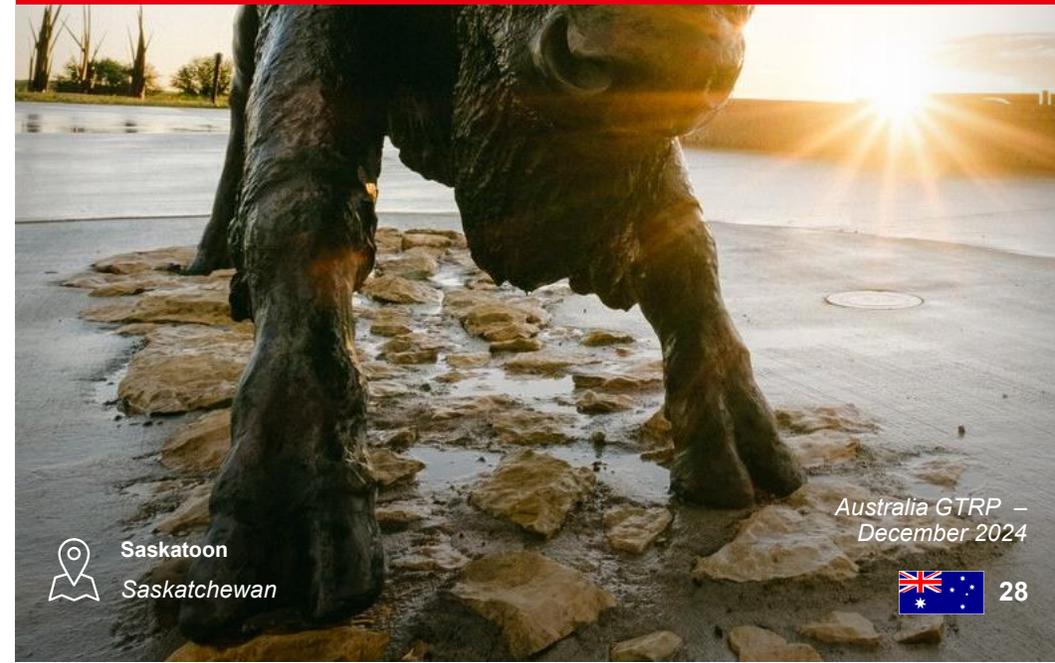
F10. Which of the following did a travel agent or tour operator help you with?

ORGANIZED GROUP TOUR FOR RECENT TRIP

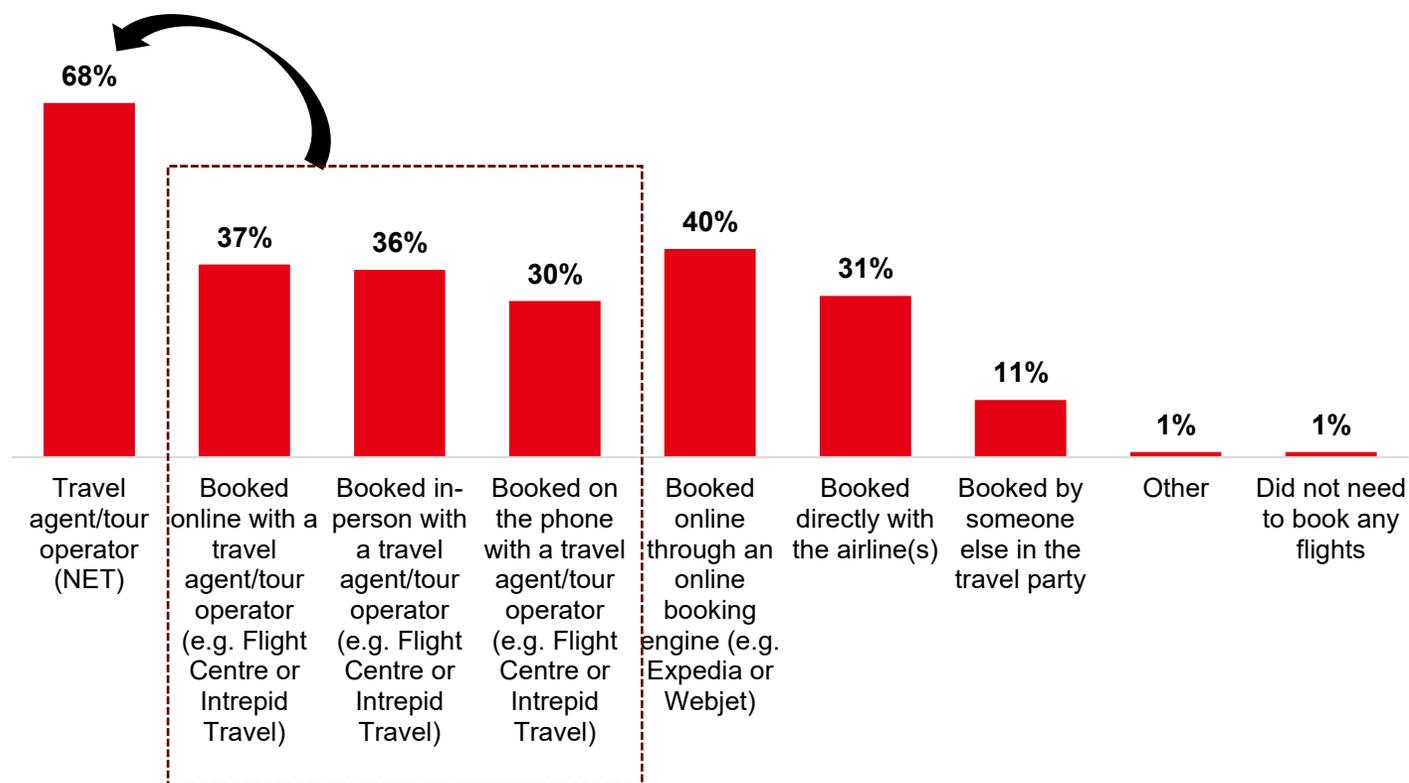


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=227)
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

Group tours are popular among Australian travellers, with one half having their whole trip as a part of an organized tour and another nearly two in ten having a portion of their trip as part of a tour.



BOOKING FLIGHTS FOR RECENT TRIP



Recent travellers to Canada were most likely to have booked flights through a travel agent or tour operator.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=227)
 F12. How did you book your flight for this trip? (Select all that apply)

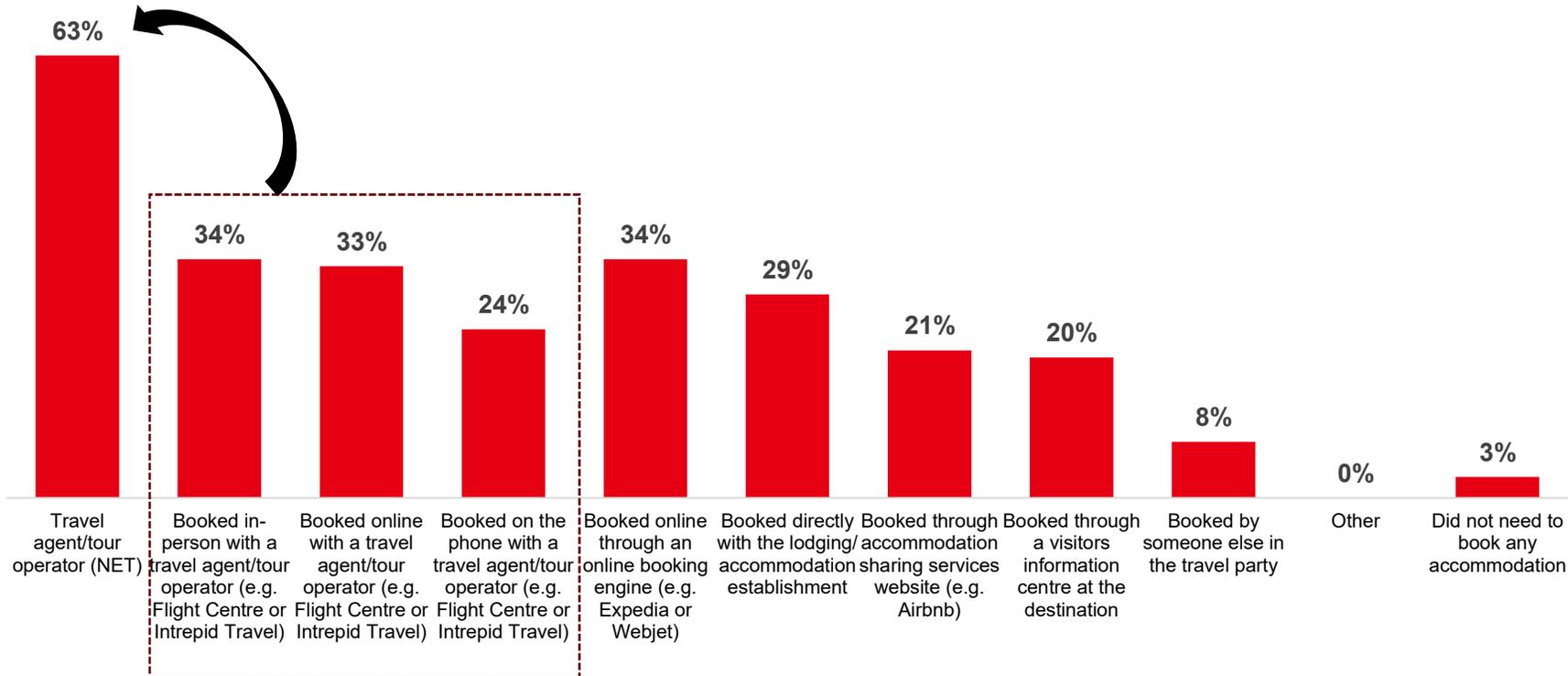


Montmorency Falls Park, Quebec City
 Quebec

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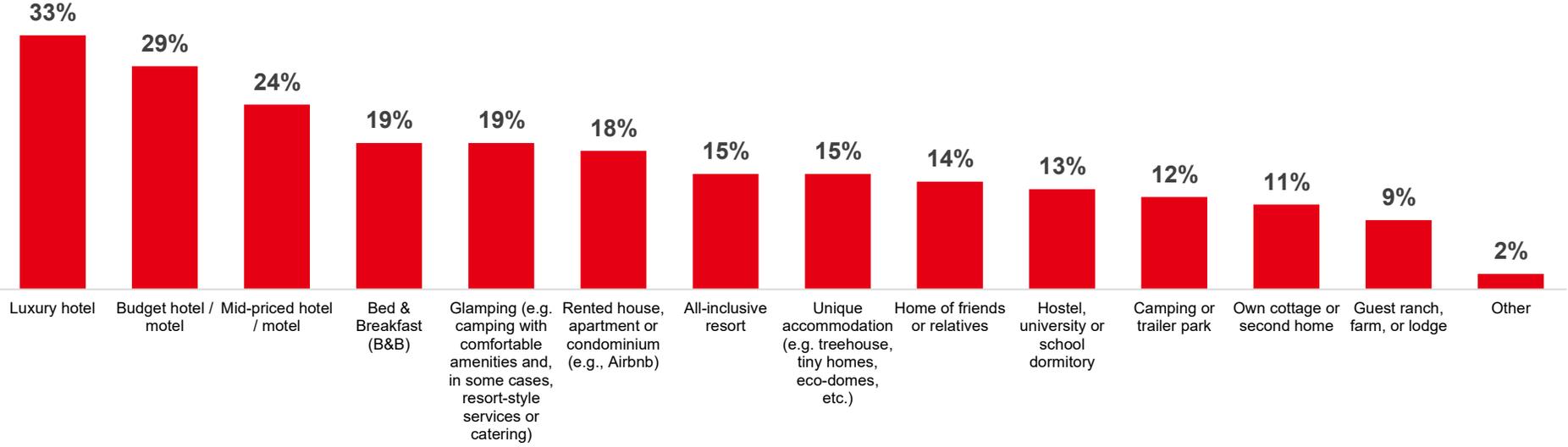
BOOKING ACCOMMODATIONS FOR RECENT TRIP



Over six in ten recent travellers to Canada booked their accommodations through a travel agent or tour operator.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=227)
 F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP



One third of Australian travellers that recently travelled to Canada stayed at a luxury hotel. Nearly three in ten also stayed at a budget hotel or motel.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=220)
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

THANK YOU

For any questions, please reach out to research@destinationcanada.com

