2024 GLOBAL TRAVELLER RESEARCH PROGRAM

AUSTRALIA STRATEGIC REPORT

Yellow Knife *Northwest Territories*

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA collective

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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.

SEGMENT DESCRIPTION SLIDES

Destination Canada categorizes travellers into seven key segments using a short series of questions called the **Traveller Segmentation Program typing tool**. Four segments have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities – these segments are referred to as Highly Engaged Guests and are Destination Canada's recommendation for all international leisure tourism targeting towards Canada. Throughout this report audience breakouts are included sometimes for Highly Engaged Guests (HEGs) as a whole and for individual segments that make up Highly Engaged Guests.

HIGHLY ENGAGED GUESTS

Outdoor Explorers
Base motivations

Adventure
Novel & Authentic
Escape & Relax

Culture Seekers
Base motivations

Novel & Authentic
New Connections
Familiarity

Refined Globetrotters
Base motivations

Novel & Authentic
Security
Bonding

Purpose Driven Families
Base motivations

Bonding
Novel & Authentic
Adventure

OTHER TRAVELLER SEGMENTS

City Trippers
Base motivations

Fun
Escape & Relax
Bonding

Simplicity Lovers
Base motivations

Escape & Relax
Security
Simplicity

Fun & Sun Families
Base motivations

Bonding
Escape & Relax
Fun

To Learn More

If you'd like to learn more about Destination Canada's segments, and their motivations, explore detailed market profiles, training options, and segment identification tools at TourismDataCollective.ca/Segmentation

Lunenburg
Nova Scotia

KEY INSIGHTS

KEY INSIGHTS

DESTINATION CANADA

Canada's Market Potential & Competitive Destinations

- The immediate potential for Canada is 3.7M Australian travellers
- The four HEG priority segments represent eight in ten (82%) of the immediate market potential:
  - ✓ **Culture Seekers**, Canada's priority segment, represents the largest opportunity at 1M Australian travellers
  - ✓ **Outdoor Explorers** are the second largest segment at 790K, followed by **Refined Globetrotters (**733K) and **Purpose Driven Families (**495K)
- At 34%, Canada currently ranks 4th in terms of consideration trailing behind Japan (49%), UK (44%) and the US (38%)
- Australian travellers view Canada as having beautiful natural scenery/landscapes and a great place to see wildlife in its natural habitat. It is also a destination that has great outdoor/physical activities and unique/natural wonders to discover. However, there is an opportunity to further educate them on what Canada has to offer as only 36% say they have at least very good knowledge of holiday opportunities in the destination. While this is similar to the US (36%) and Japan (35%), it is quite a bit lower than their knowledge of the UK (48%)
- In addition to competing with destinations higher on the priority list, cost is a top factor that would discourage Australians from travelling to Canada. This is true among all segments, although less of a concern for **Culture Seekers** – the top priority segment. Of note is the smaller gap in consideration for Canada as a Winter destination vs. Fall among Australians as compared to other markets

KEY INSIGHTS

Key Drivers & Opportunities by Priority Segment

Culture Seekers

- At approximately one-half (49%), **Culture Seekers** are more likely to have visited Canada compared to the average Australian traveller. However, while they do have a positive Net Promoter Score (NPS) (+21), it is the lowest of all HEG segments
- Among **Culture Seekers**, Canada's strengths lie in being *a place with wide-open landscapes*, *a place for enjoying nature in close proximity to cities*, *having welcoming people*, *being a place where the vastness of nature can be enjoyed*, *having great outdoor/physical activities* and *a great place to see wildlife in its natural habitat*
- Overall, there is an opportunity to further carve out Canada's personality among **Culture Seekers** who at present have relatively neutral perceptions of competing destinations
- Strengthening perceptions of key drivers can help position Canada more effectively against competitors. There is potential to enhance consideration by emphasizing emotional connections such as *personal meaning, place I want to visit with family and trending as a must-visit destination* as well as improving value perceptions

KEY INSIGHTS

DESTINATION CANADA

Fall Travel

- Seasonal potential is slightly higher in the Fall (2.8M Total) vs. the Winter (2.7M)
- Canada competes closely with destinations such as Germany, Greece, US, France and Japan for Fall consideration
- In terms of top destination mentioned on an unaided basis, while Canada is most top of mind among **Refined Globetrotters,** there's an opportunity to increase share of mind among **Culture Seekers** as it relates to Fall destinations
- For most segments, the ideal Fall weather is a top motivator for travel to Canada. Further, **Culture Seekers** are more likely to have places in Canada they only want to visit during the Fall months
- Barriers vary, including availability and lack of knowledge of available activities

Winter Travel

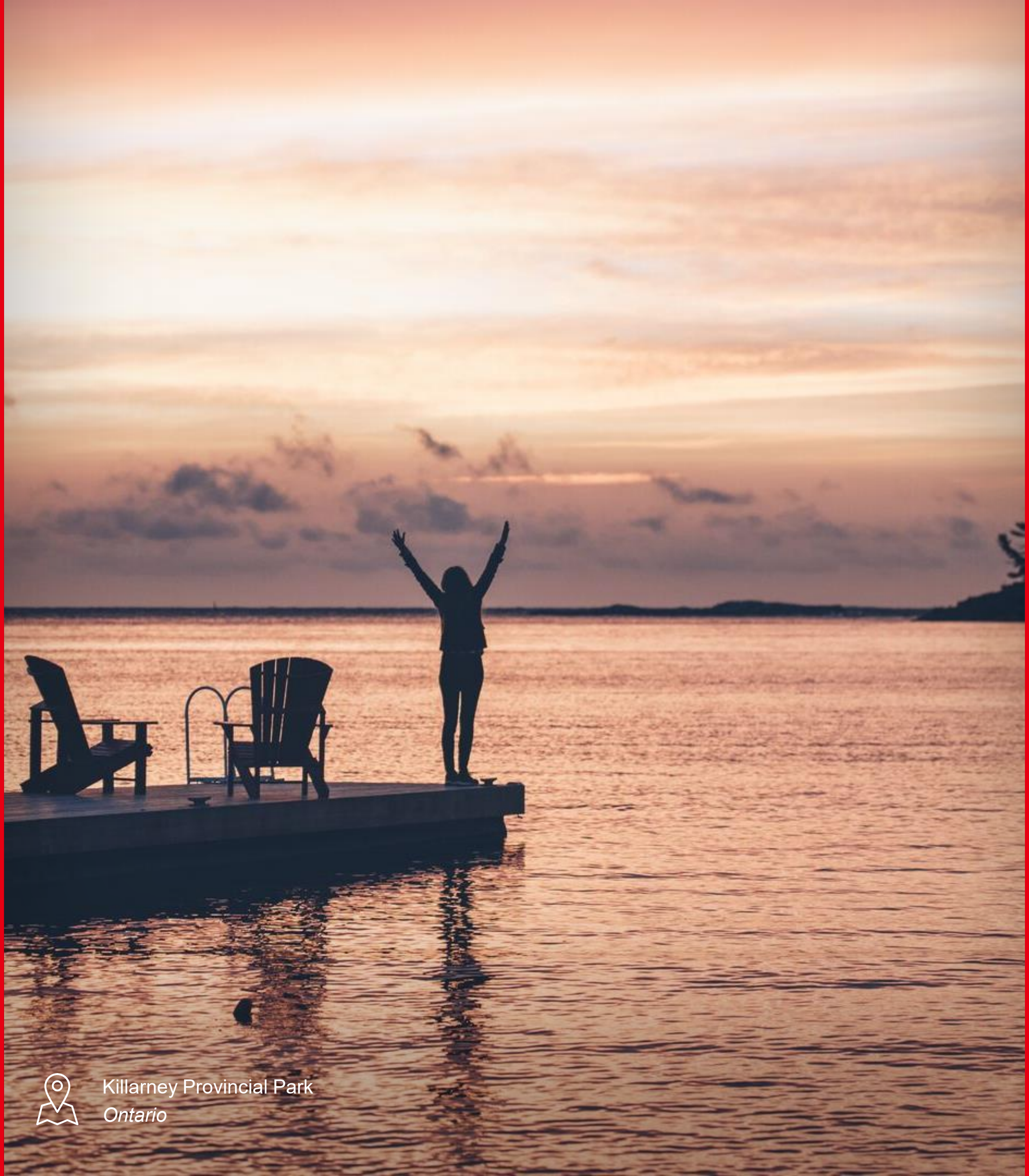
- Overall, Canada is viewed as a more distinct Winter destination, but this distinction is less evident among **Culture Seekers** (67% for Winter vs. 57% for Fall)
- Canada is the top destination mentioned on an unaided basis across segments, and like the Fall, it competes closely with several other destinations
- Canada's distinctiveness as a Winter destination resonates most with **Outdoor Explorers** and **Refined Globetrotters**, highlighting strong alignment with adventure-oriented travellers
- While weather suitability and holiday availability remain top motivators for many, cold weather persists as the primary barrier for others

KEY INSIGHTS

DESTINATION CANADA

Recent Trip to Canada: Profile

- One-half (50%) of all Australians who travelled to Canada did so for leisure. This was an increase vs. one year ago as there was a shift from combined business/personal trips to solely holiday visits
- Most trips to Canada were at least four nights in length with most falling in the 4–13 night range
- All segments engaged in a nature-related activity during their trip to Canada
- Trips to Canada differed from other destinations in the following ways:
    - While most traveled to Canada for 4-13 nights, 30% spent 1-3 nights which is significantly higher than other destinations (18%) which favoured longer stays of 14+ nights
    - Trips to Canada were more likely to include children under 18 and/or friends
    - Travellers to Canada are more likely than travellers to other destinations to use a travel agent
    - At 50%, trips to Canada are more than two times as likely to be fully organized by a group tour
    - One-third of Australian travellers to Canada booked luxury hotels for their trip, compared to just 20% for other destinations (where mid-price hotels were more common). In fact, several other accommodation types were used more for Canada trips (including glamping and all-inclusive resorts)



MARKET SIZING

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

7,850,500 (Recent Long-Haul Travellers)

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

8,857,000 (Upcoming Long-Haul Travellers)

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)

DESTINATION CANADA

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

Australia's immediate potential has increased, resulting in 3.7M definitely/very likely to visit Canada in the next two years.

Total potential **Long-Haul Pleasure** travellers aged 18 years or more	**10,366,500**
	x
Target Market for Canada *(Those in the dream to purchase stages of the path to purchase for Canada)*	**71.6%**
	=
Size of the Target Market	**7,422,500**
	x
Immediate Potential for Canada *(Will definitely/very likely visit Canada in the next 2 years[1])*	**50.0%** ↑
	=
Immediate Potential	**3,711,500**

[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)

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

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS): BY SEGMENT

DESTINATION CANADA

In general, potential visitation is higher in the Winter across all segments, with Culture Seekers representing the greatest opportunity.

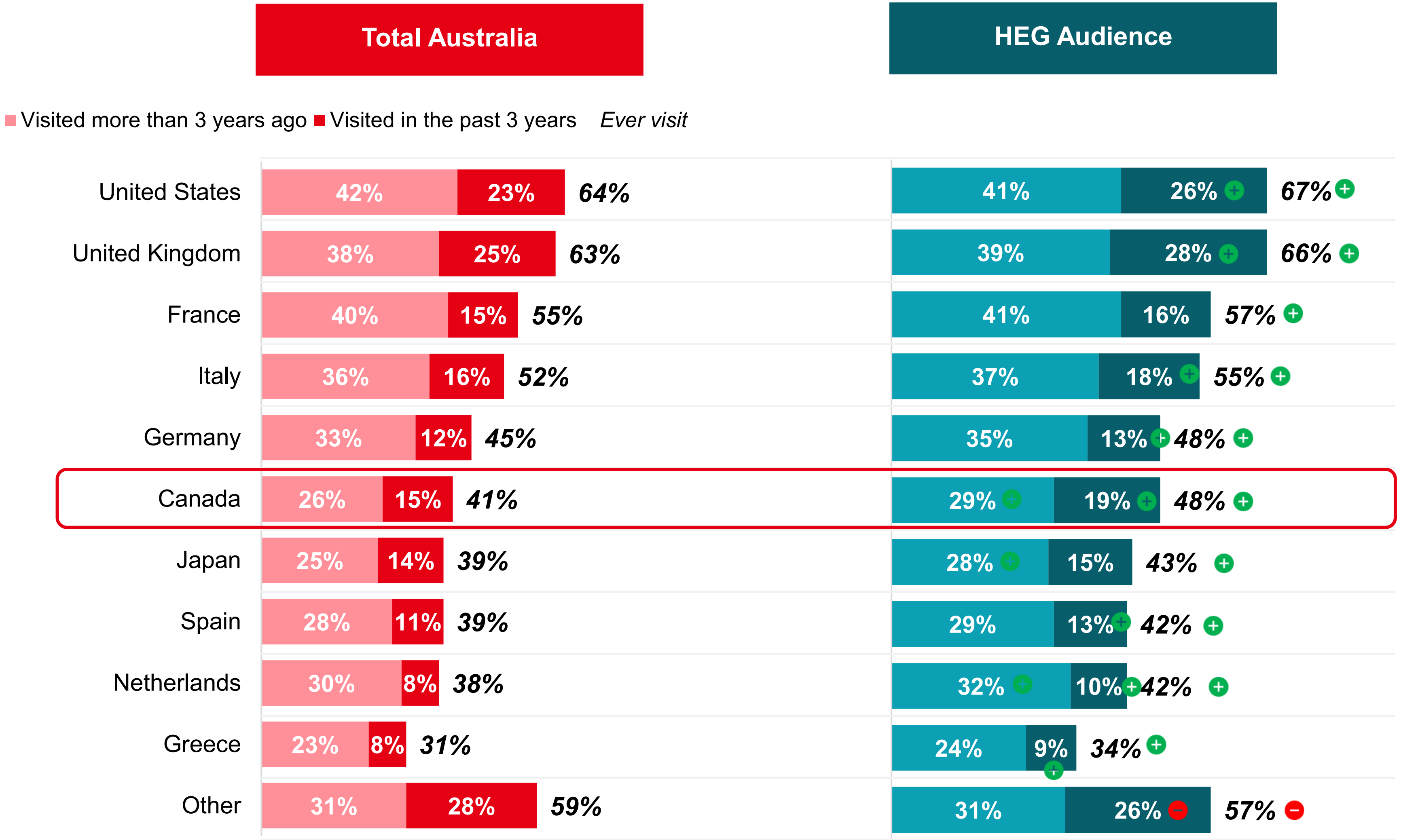
	10,366,500 (Total Long-Haul Travellers)							
Total segment sizes	1,980,000 Outdoor Explorers		2,384,500 Culture Seekers		1,866,000 Refined Globetrotters		902,000 Purpose Driven Families	
X **Target Market for Canada** *(Those in the dream to purchase stages of the path to purchase for Canada)*	69.1%		78.2%		74.6%		79.4%	
= Size of the Target Market	**1,368,000**		**1,865,500**		**1,392,000**		**716,000**	
X **Immediate Potential for Canada** *(Will definitely/very likely visit Canada in the next 2 years[1])*	57.7%		54.0%		52.7%		69.1%	
= Immediate Potential	**790,000**		**1,007,500**		**733,000**		**494,500**	
X **Immediate Seasonal Potential** *(Consideration for Canada in [SEASON] in next 2 years)*	**Fall** 37.4%	**Winter** 41.1%	**Fall** 45.3%	**Winter** 47.9%	**Fall** 40.0%	**Winter** 45.0%	**Fall** 33.7%	**Winter** 53.5%
= Immediate Seasonal Potential	**Fall** 295,500	**Winter** 324,500	**Fall** 457,000	**Winter** 483,000	**Fall** 293,500	**Winter** 330,000	**Fall** 166,500	**Winter** 264,500

[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): Outdoor Explorers (n=347); Culture Seekers (n=274); Refined Globetrotters (n=130); Purpose Driven Families (n=224)
Immediate potential for Canada = dream to purchase stages for P2P for Canada: Outdoor Explorers (n=271); Culture Seekers (n=204); Refined Globetrotters (n=103); Purpose Driven Families (n=149)
Immediate autumn potential for Canada: Outdoor Explorers (n=115); Culture Seekers (n=146); Refined Globetrotters (n=107); Purpose Driven Families (n=71); Immediate winter potential for Canada: Outdoor Explorers (n=115); Culture Seekers (n=146); Refined Globetrotters (n=107); Purpose Driven Families (n=71)
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)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years?

CANADA VS. COMPETITORS

PAST VISITATION

While 41% of Australian travellers and nearly one-half of the HEG audience (including CSs) have travelled to Canada in the past, the country ranks 6th, behind the US, UK, France, Italy and Germany.



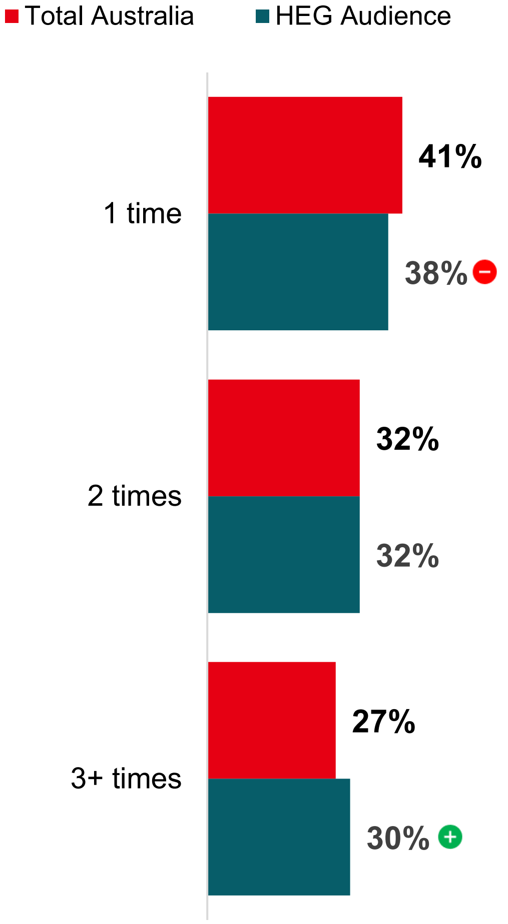
49% of **Culture Seekers** ever visited Canada

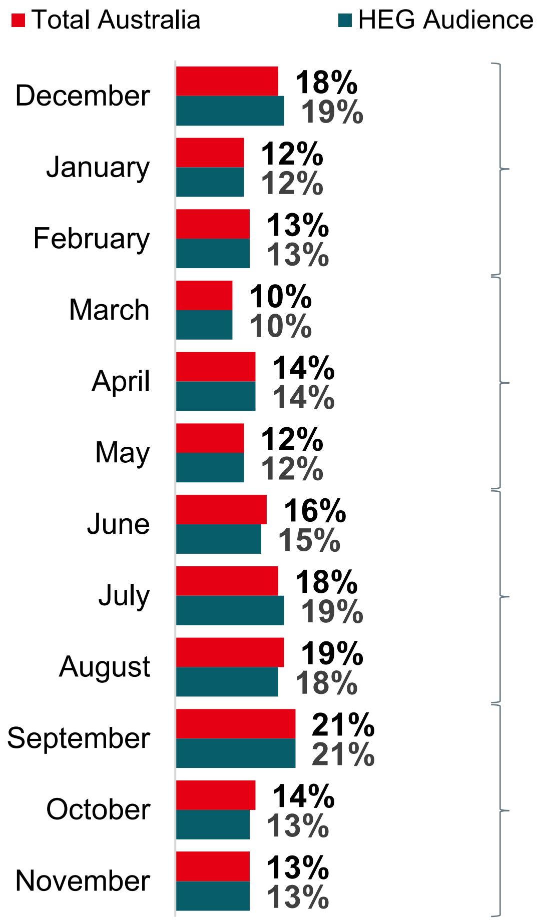
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510); HEG (n=1039)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of Australia, New Zealand and the Pacific Islands** which was 1 or more nights long?

+/− = significantly higher/lower result (HEG vs. 2024 Total)

NUMBER OF VISITS EVER & TIME OF YEAR VISITED CANADA

The HEG audience shows slightly higher repeat visits (3+) to Canada compared to overall Australian travellers, with Summer being the most popular travel season for both groups.





	Total Travellers	Total HEG Travellers
Winter	35%	36%
Spring	29%	29%
Summer	41%	42%
Fall	37%	37%

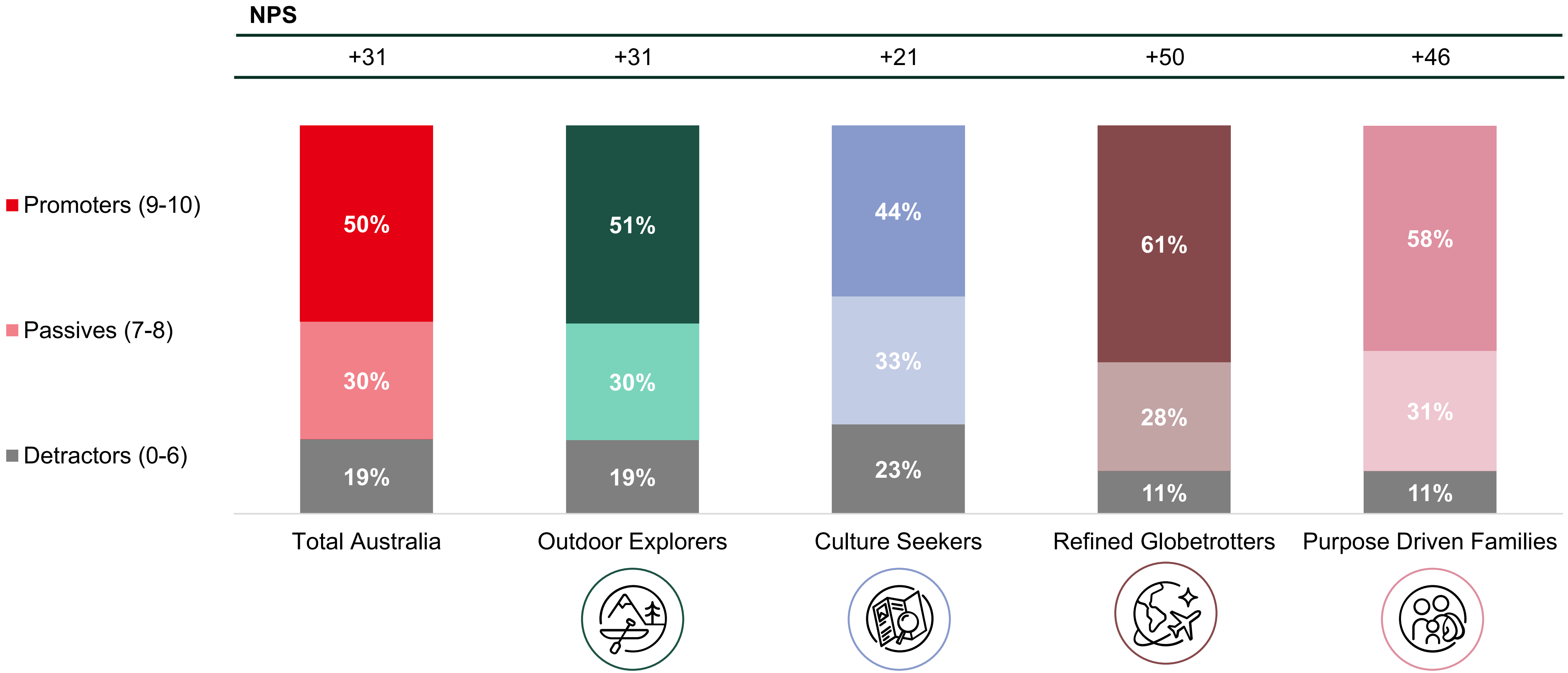
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada (n=624); HEG (n=497)
F19a. Approximately, how many times have you ever been to Canada?
F20. What time of year have you ever visited Canada? Select all that apply.

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

CANADA NET PROMOTER SCORE (NPS): BY SEGMENT

DESTINATION CANADA

Canada has a high NPS among all segments; however, it is lowest among the CSs.

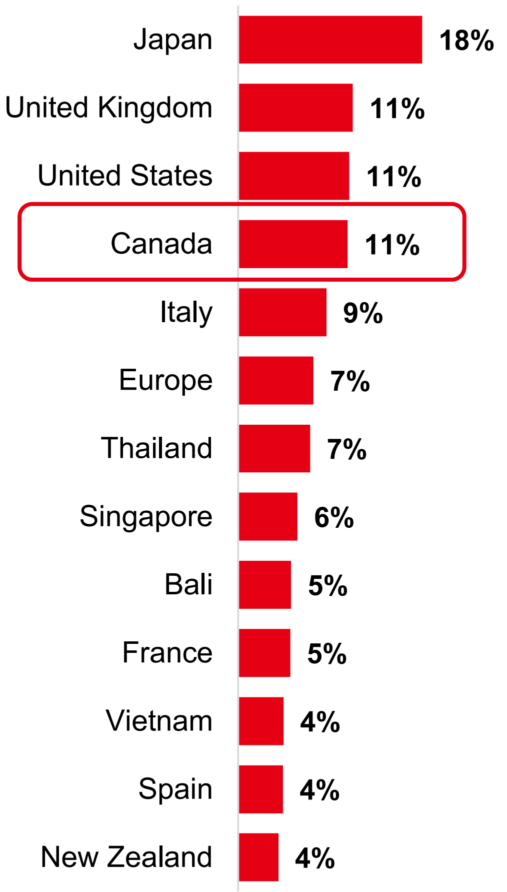


Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada: Total (n=624); Outdoor Explorers (n=138); Culture Seekers (n=170); Refined Globetrotters (n=118); Purpose Driven Families (n=71)
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

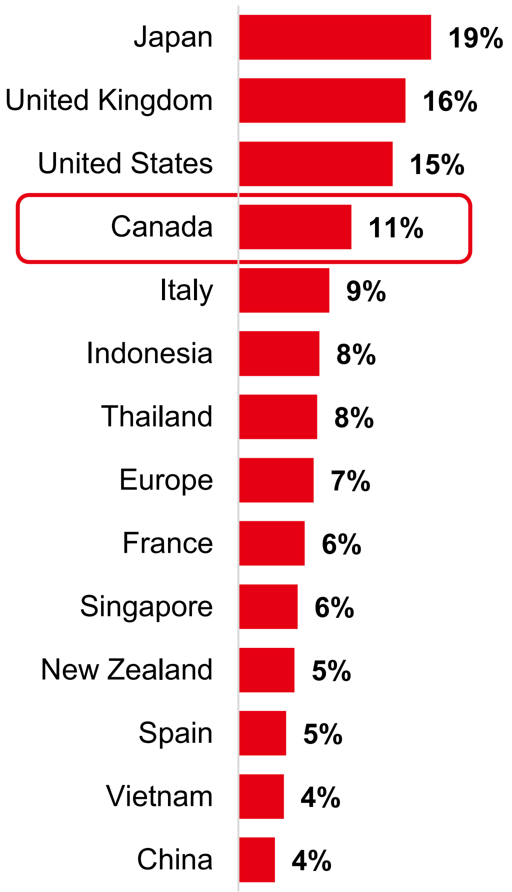
UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)

Compared to other destinations, Canada ranks 4th in terms of unaided consideration, behind Japan, the UK and the US.

Top Destination Brands[1]



Top Destinations[2]



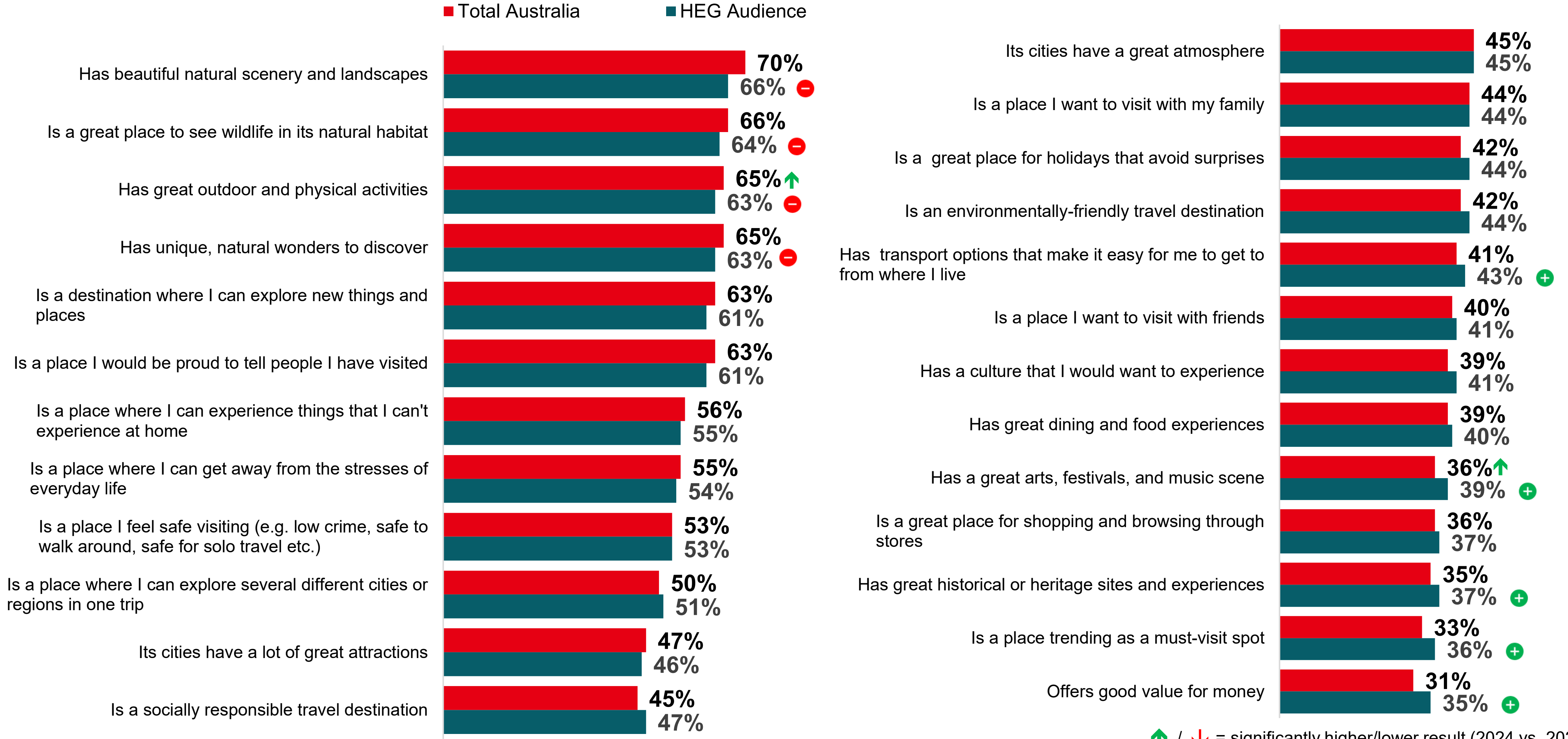
11% of Culture Seekers mention Canada

[1] Responses as mentioned by respondents (e.g., percentage who said “Canada” specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
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)

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

IMPRESSIONS OF CANADA AS A HOLIDAY DESTINATION

Although less so among HEGs, Canada is mainly associated with its beautiful scenery and landscapes as well as being a place to see wildlife in its natural habitat.

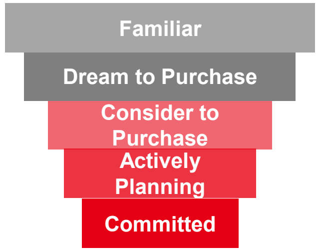


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

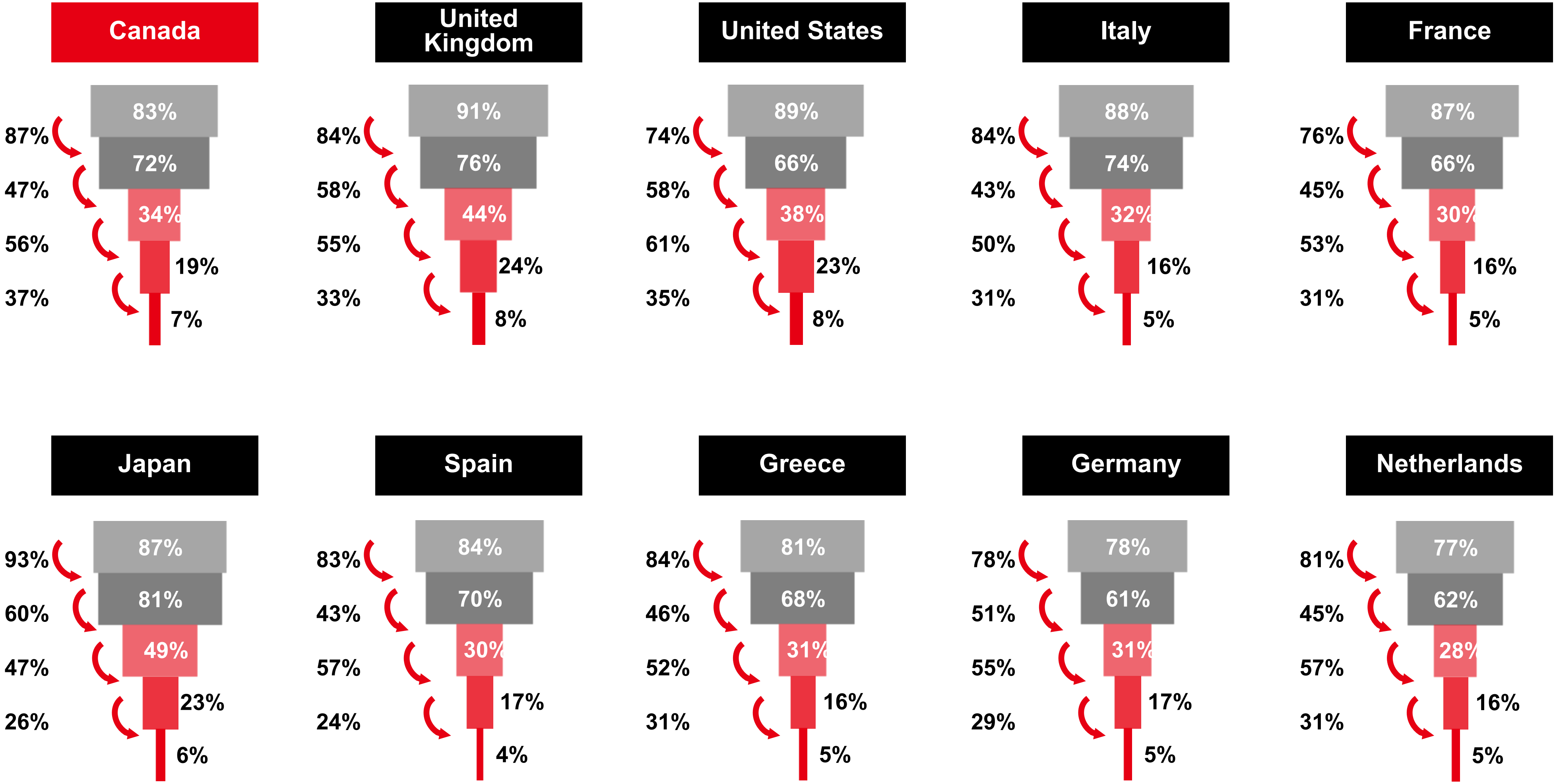
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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) (n=1510); HEG (n=1039)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

CONSIDERATION FUNNELS: TOTAL AUSTRALIA



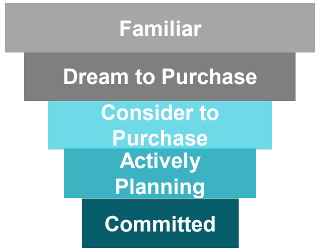
Overall, almost three quarters of Australian travellers dream of visiting Canada. Conversion from dream to consideration is 47%. Only 34% are considering travel to Canada compared to 49% for Japan and 44% for the UK.

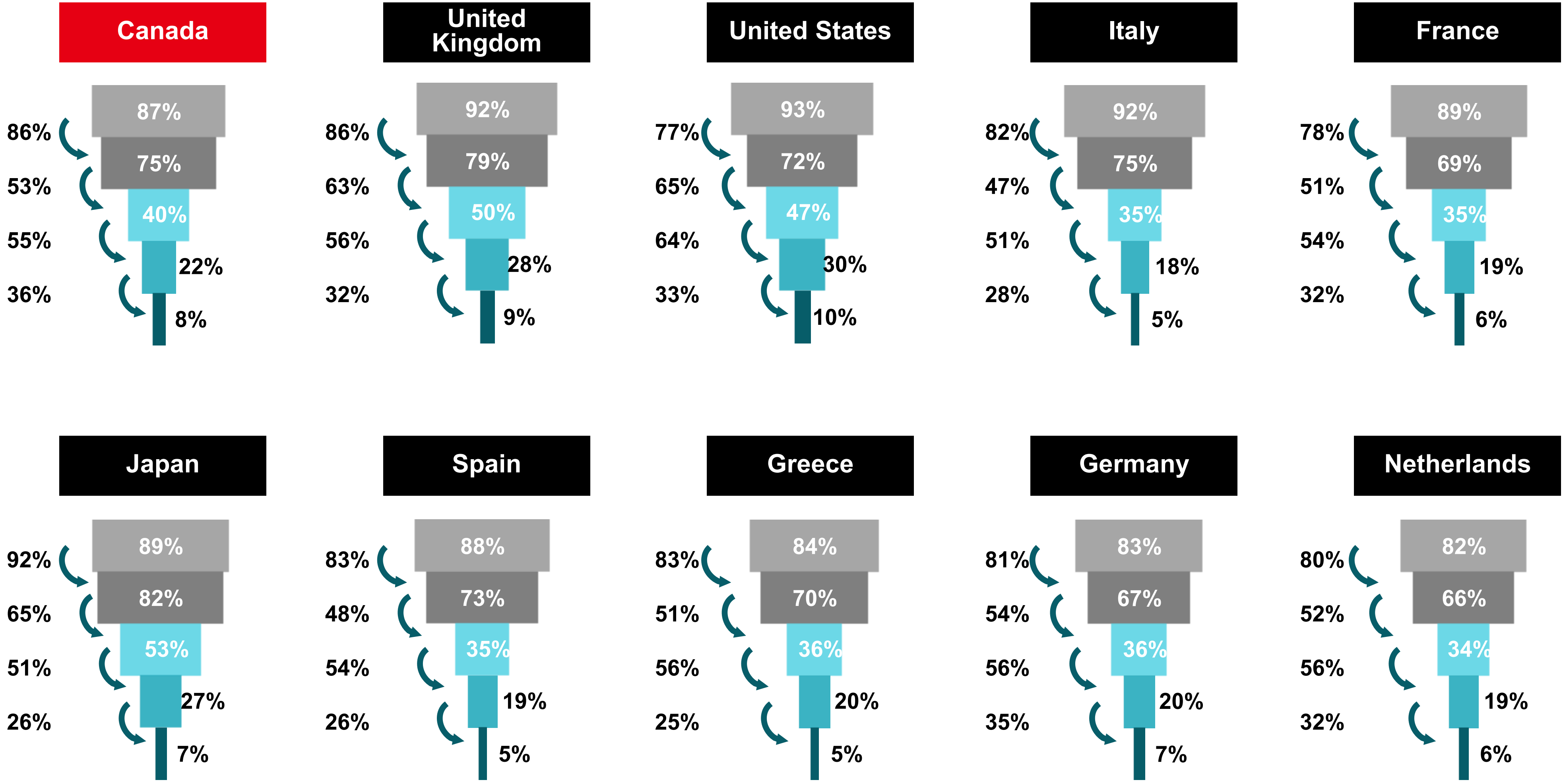


Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
See notes for question wording and funnel definitions

CONSIDERATION FUNNELS: AMONG HEG TRAVELLERS

Two-fifths of HEG travellers are considering a trip to Canada, while one-fifth are actively planning their visit.

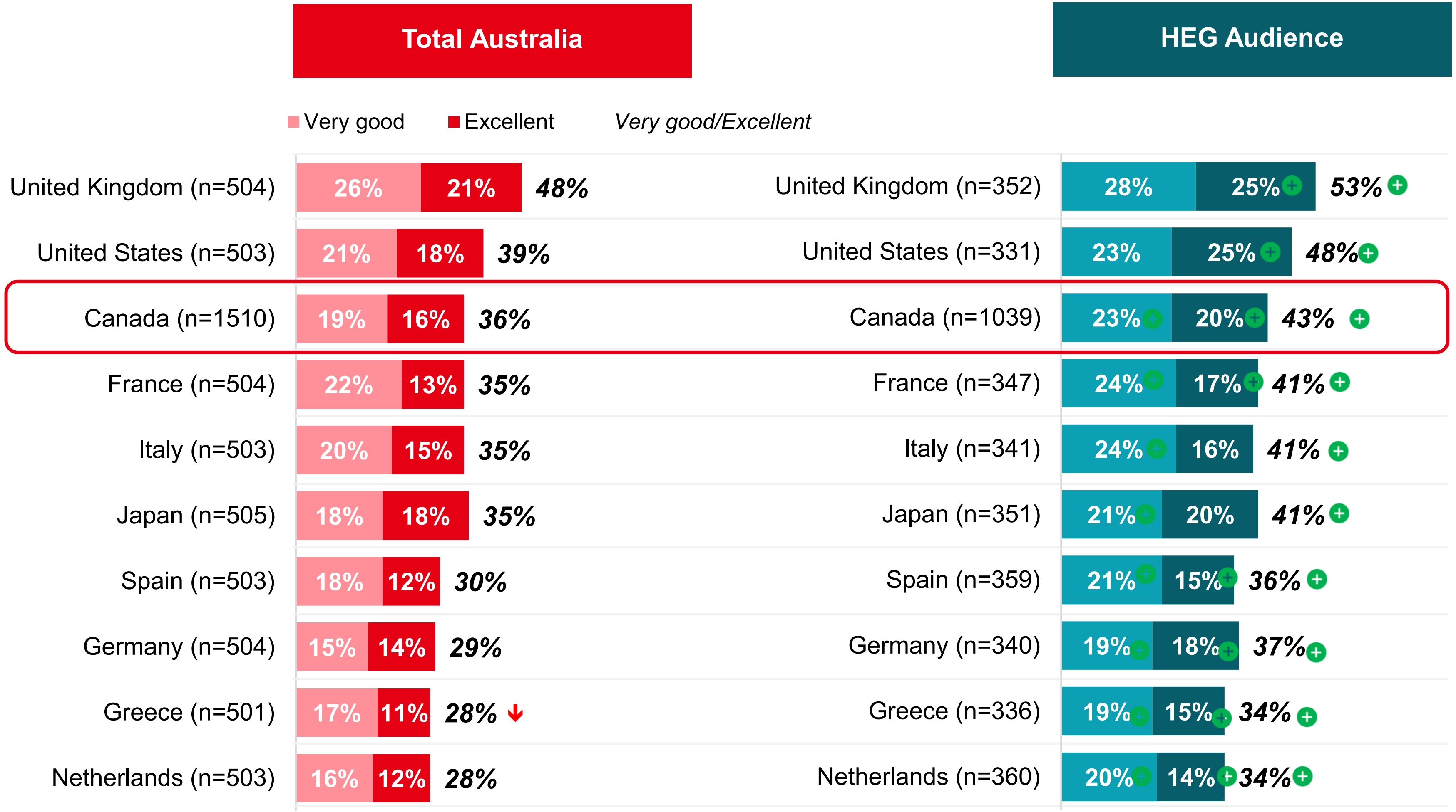




Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEG, Evaluated [DESTINATION]
See notes for question wording and funnel definitions

LEVEL OF KNOWLEDGE OF HOLIDAY OPPORTUNITIES

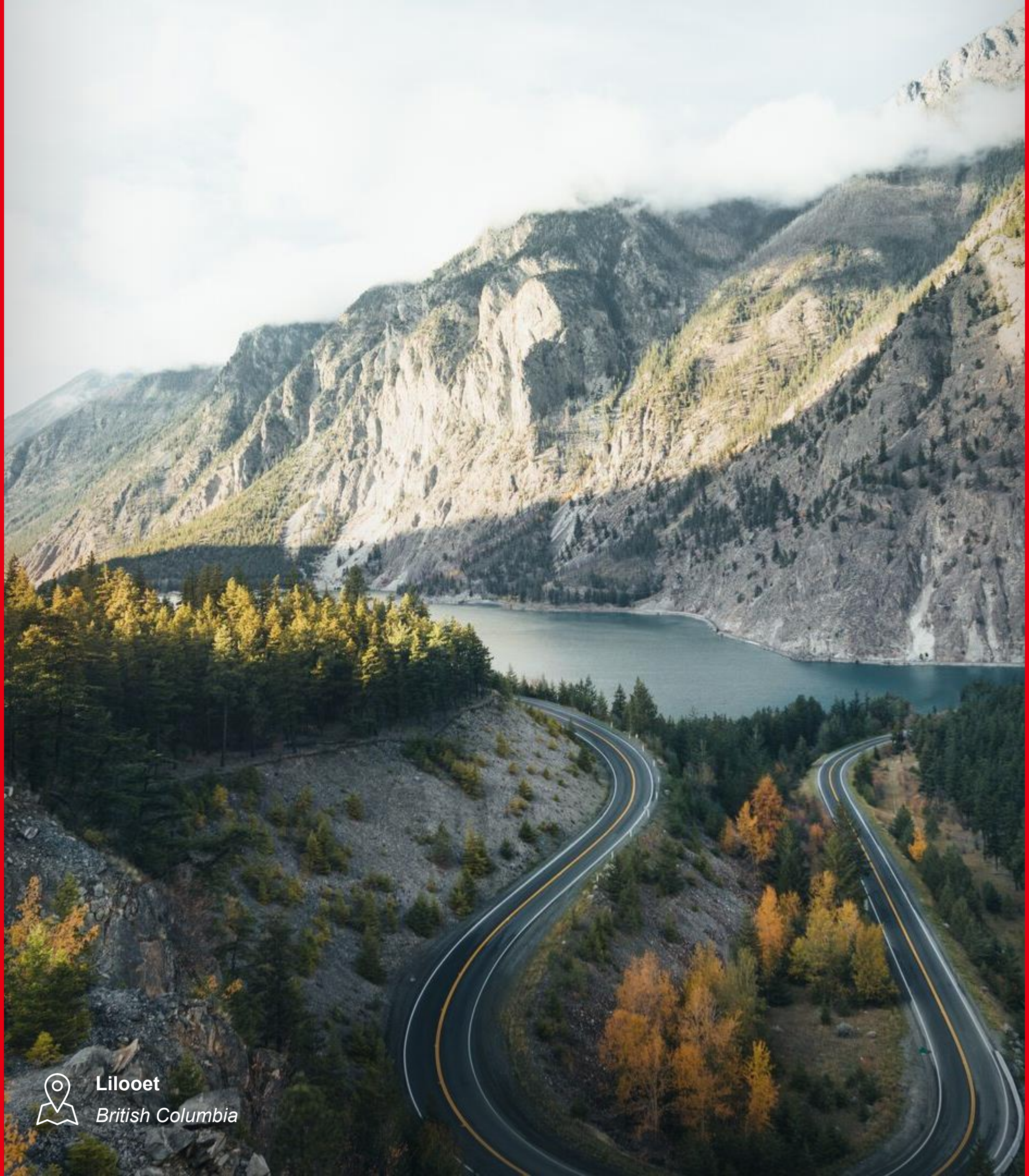
At 36%, top two box knowledge of Canada is similar to the US, and higher among the HEG audience.



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

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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 [DESTINATION]
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

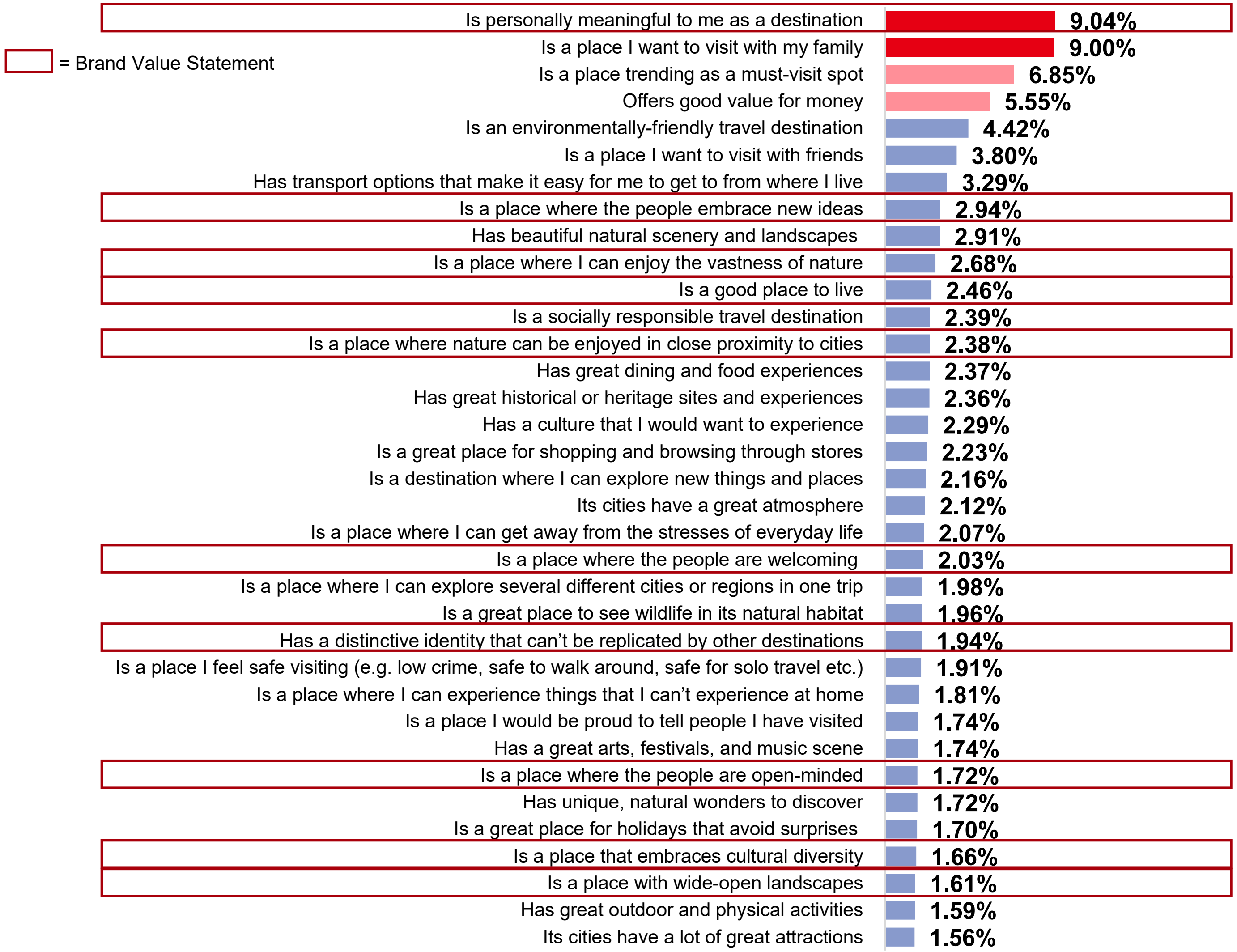


KEY DRIVERS

DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (CULTURE SEEKERS)

DESTINATION CANADA

For CSs, personal meaning and visiting with family are primary drivers while being a place that is trending as a must-visit spot and good value for money stand out as secondary drivers.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

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), Culture Seekers (n=347)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

DESTINATION ATTRIBUTES: RELATIVE STRENGTHS & WEAKNESSES (CULTURE SEEKERS)

DESTINATION CANADA

To CSs, Canada is known for its great outdoor/physical activities as well as being a great place to see wildlife in its natural habitat. There is opportunity for Canada to strengthen perceptions on the many dimensions not currently associated with any destinations.

		Canada	France	Germany	Greece	Italy	Japan	Netherlands	Spain	United Kingdom	United States
	n=	347	112	112	102	113	118	121	126	117	120
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life				Strength						Weakness
	Is a place I would be proud to tell people I have visited										
	Is a destination where I can explore new things and places										
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)										Weakness
	Is a place where I can explore several different cities or regions in one trip										
	Offers good value for money				Strength						
	Has transport options that make it easy for me to get to from where I live						Strength				
Type of Trip	Is a place I want to visit with friends										
	Is a place I want to visit with my family										
	Is a great place for holidays that avoid surprises									Strength	
	Is a place where I can experience things that I can't experience at home				Strength						
	Is an environmentally-friendly travel destination				Weakness	Weakness		Strength			
	Is a socially responsible travel destination										
	Is a place trending as a must-visit spot						Strength				
To-Do	Is a great place for shopping and browsing through stores	Weakness			Weakness						Strength
	Its cities have a lot of great attractions	Weakness								Strength	
	Has great outdoor and physical activities	Strength									
	Has great dining and food experiences	Weakness	Strength					Weakness			
	Has a great arts, festivals, and music scene				Weakness						
To-See	Its cities have a great atmosphere	Weakness									
	Has beautiful natural scenery and landscapes										
	Is a great place to see wildlife in its natural habitat	Strength			Weakness	Weakness			Weakness		
	Has great historical or heritage sites and experiences	Weakness									Weakness
	Has a culture that I would want to experience	Weakness			Strength					Weakness	Weakness
	Has unique, natural wonders to discover										

No destination has a strength for this statement

Strength | Weakness

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), Culture Seekers, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

BRAND VALUE STATEMENTS (CULTURE SEEKERS)

In terms of brand value statements, Canada's strengths lie in being a place with wide-open landscapes, a place for enjoying nature in close proximity to cities, having welcoming people and being a place where the vastness of nature can be enjoyed.

	Canada	France	Germany	Greece	Italy	Japan	Netherlands	Spain	United Kingdom	United States
n=	347	112	112	102	113	118	121	126	117	120
Is a place with wide-open landscapes										
Is a place where nature can be enjoyed in close proximity to cities										
Is a place that embraces cultural diversity										
Is a place where the people are welcoming										
Is a place where the people are open-minded										
Is a place where the people embrace new ideas										
Is a good place to live										
Has a distinctive identity that can't be replicated by other destinations										
Is personally meaningful to me as a destination										
Is a place where I can enjoy the vastness of nature										

No destination has a strength for this statement

Strength

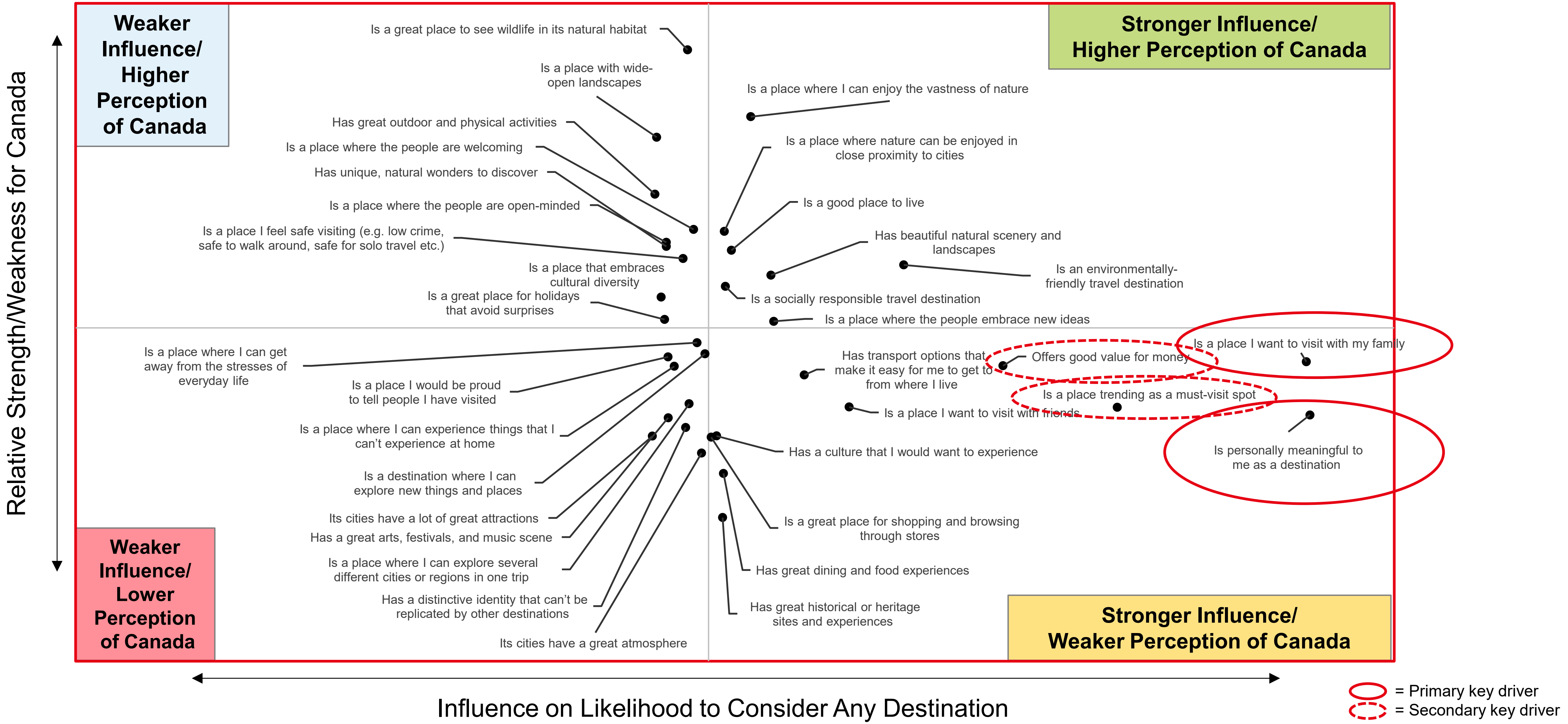
Weakness

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), Culture Seekers, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

CANADA STRENGTHS & OPPORTUNITIES (CULTURE SEEKERS)

DESTINATION CANADA

There is an opportunity for Canada to improve consideration by strengthening perceptions on the top drivers, including personal meaning, place to visit with family, trending as a must-visit spot and value.

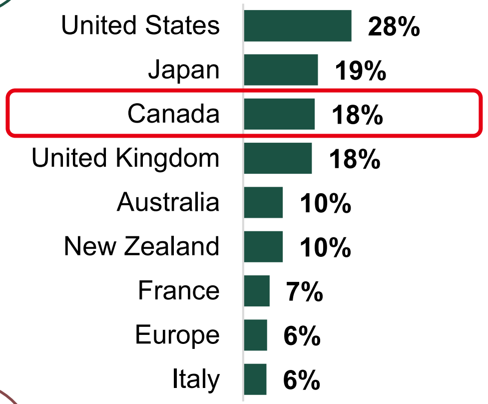


SEASONAL TRAVEL

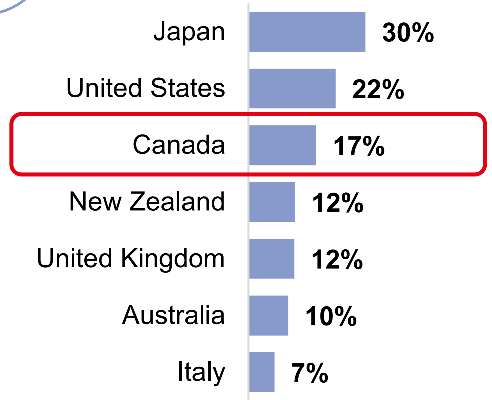
TOP UNAIDED FALL DESTINATIONS: BY SEGMENTS

Among CSs and OEs, Canada lags behind both Japan and US as a Fall destination. Canada is most top of mind among RGs.

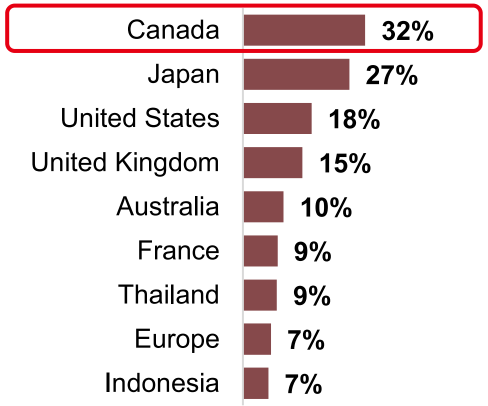
Outdoor Explorers
(n=147)



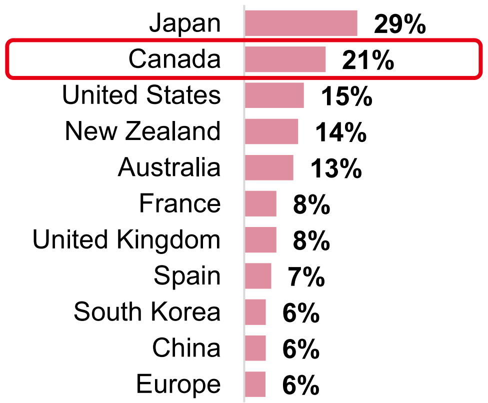
Culture Seekers
(n=178)



Refined Globetrotters
(n=124)



Purpose Driven Families
(n=72)

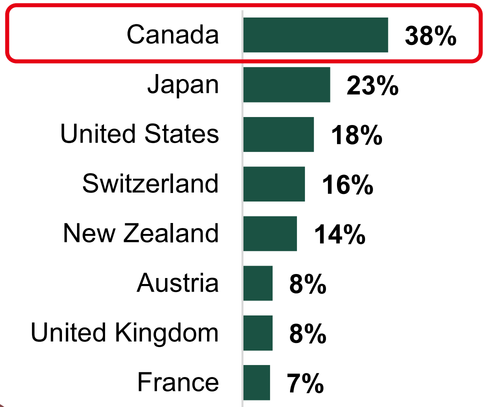


Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You 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.

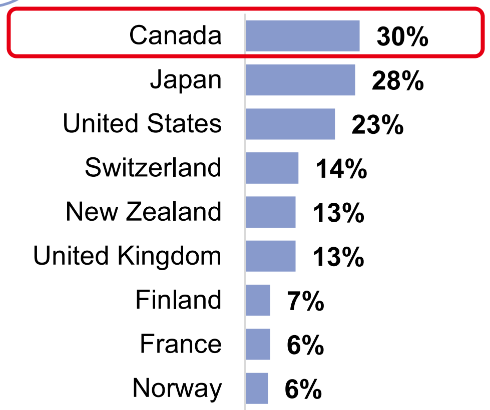
TOP UNAIDED WINTER DESTINATIONS: BY SEGMENTS

Canada ranks first in terms of winter destinations across all segments. However, among CSs (and RGs) Japan is a close second.

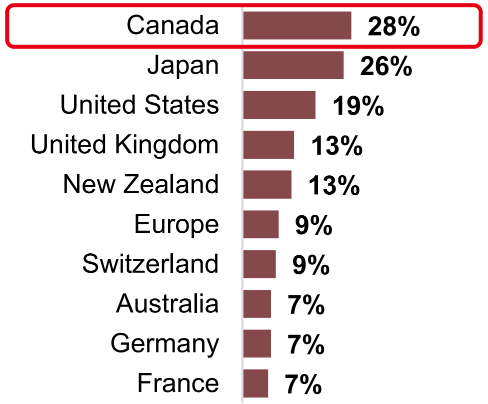
Outdoor Explorers
(n=141)



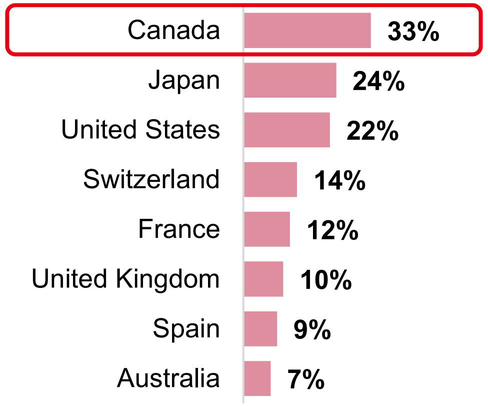
Culture Seekers
(n=169)



Refined Globetrotters
(n=150)



Purpose Driven Families
(n=58)



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (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.

SEASONAL CONSIDERATION BY DESTINATION

While Canada's consideration is highest in the Summer, it falls behind competitors, most notably Greece and Italy. That said, Canada is more competitive in both the Fall and Winter.

Total Australia	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Canada (n=1080)	36%	37%	41%	38%
France (n=332)	31%	38%	45%	40%
Germany (n=307)	37% ↑	37%	45%	43%
Greece (n=340)	27%	46%	51% ↑	43%
Italy (n=373)	27%	42%	53% ↑	41%
Japan (n=408)	40%	45%	36%	39%
Netherlands (n=312)	30%	39%	46%	36%
Spain (n=354)	28%	48% ↑	46%	38%
United Kingdom (n=385)	33% ↑	39%	49%	38%
United States (n=331)	40% ↑	44%	42%	42% ↑

HEG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Canada (n=777)	38%	38%	40%	37%
France (n=238)	34%	40%	45%	43%
Germany (n=227)	38%	39%	43%	44%
Greece (n=235)	28% ⊕	45%	50% ⊖	43%
Italy (n=257)	32%	44%	49%	41%
Japan (n=288)	42%	45%	39%	39%
Netherlands (n=239)	31% ⊕	39%	46%	37%
Spain (n=261)	29%	48%	48%	39%
United Kingdom (n=276)	37%	40%	47%	41%
United States (n=239)	41%	47%	40%	42%

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

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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), Those in the dream to purchase stages of the path to purchase for [DESTINATION]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

FALL/WINTER CONVERSION – TOTAL AUSTRALIA

At 2.8M, Fall demand from Australia is slightly stronger than in Winter (2.7M).

Fall

45.6%
Demand During Fall **Months**
(any destination)

4,727,000

78%

35.4%
Extremely Interested in Visiting a Destination During its Fall **Season**
(any destination)

3,669,500

77%

38.1%
Next 2 Year Potential Target Market **for CANADA During Fall Season**

2,828,000

Winter

43.1%
Demand During Winter **Months**
(any destination)

4,468,000

61%

26.4%
Extremely Interested in Visiting a Destination During its Winter **Season**
(any destination)

2,737,000

98%

36.2%
Next 2 Year Potential Target Market **for CANADA During Winter Season**

2,687,000

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1510)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? Total (n=750)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=760)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? Total (n=1080)

FALL/WINTER CONVERSION – HEGS

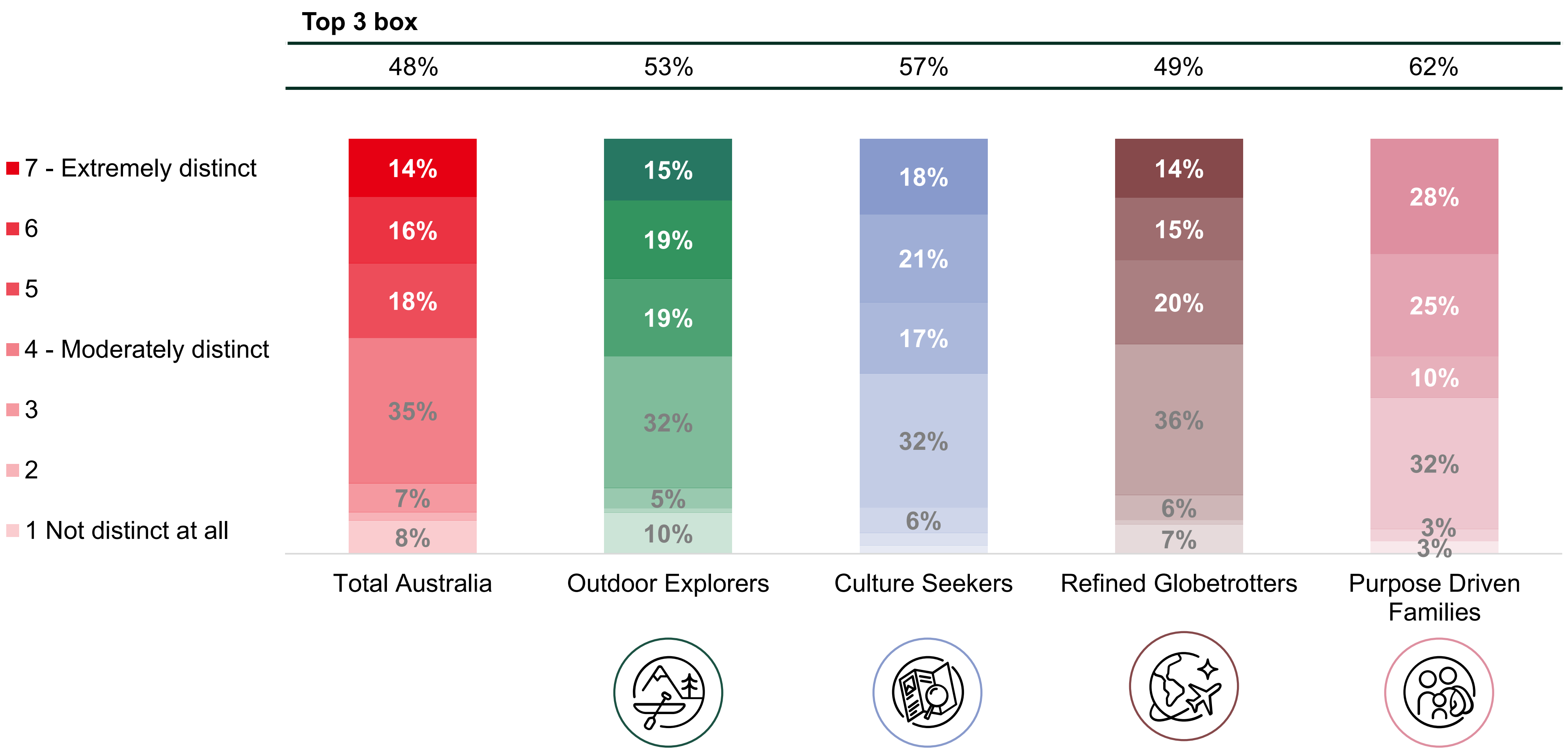
Among HEGs, Fall demand is nearly the same as Winter demand, despite higher interest in visiting a destination during its Fall season.

	Fall		Winter
47.5% Demand During Fall **Months** (any destination)	3,387,500	**43.8%** Demand During Winter **Months** (any destination)	3,124,000
	85%		70%
40.6% Extremely Interested in Visiting a Destination During its Fall **Season** (any destination)	2,895,500	**30.5%** Extremely Interested in Visiting a Destination During its Winter **Season** (any destination)	2,175,500
	69%		93%
37.4% Next 2 Year Potential Target Market **for CANADA During Fall Season**	**1,997,500**	**38.0%** Next 2 Year Potential Target Market **for CANADA During Winter Season**	**2,029,500**

Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEGs
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply (n=1039)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=521)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=518)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? (n=777)

UNIQUENESS OF CANADA AS FALL DESTINATION: BY SEGMENTS

Nearly six in ten CSs view Canada as a unique Fall destination, second only to PDFs.

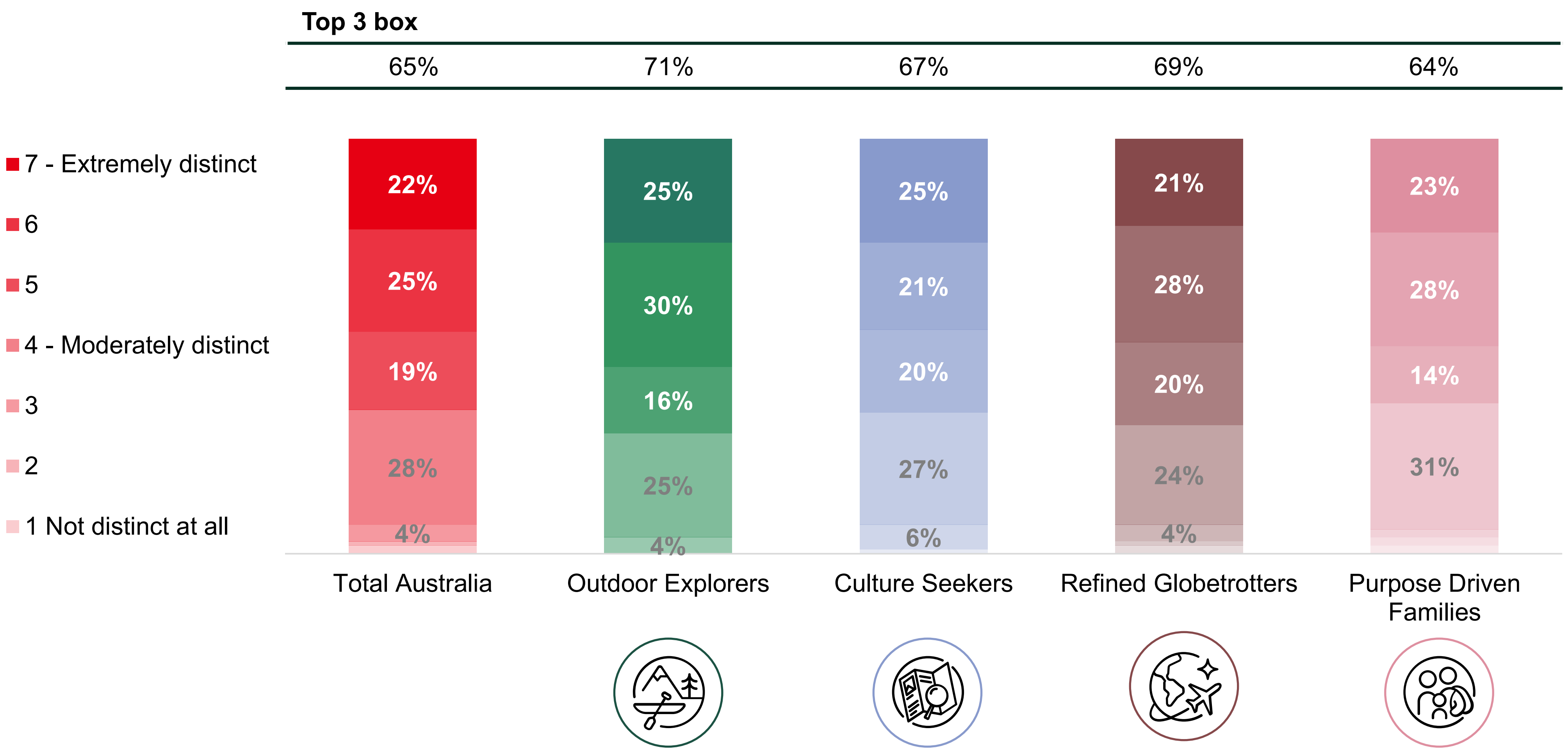


Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=750); Outdoor Explorers (n=147); Culture Seekers (n=178); Refined Globetrotters (n=124); Purpose Driven Families (n=72)
E14. How distinct is Canada as an autumn travel destination?

UNIQUENESS OF CANADA AS WINTER DESTINATION: BY SEGMENTS

DESTINATION CANADA

Overall, Canada's distinctiveness as a Winter destination is somewhat stronger than Fall but the gap among CSs is relatively small (67% for Winter vs. 57% for Fall)

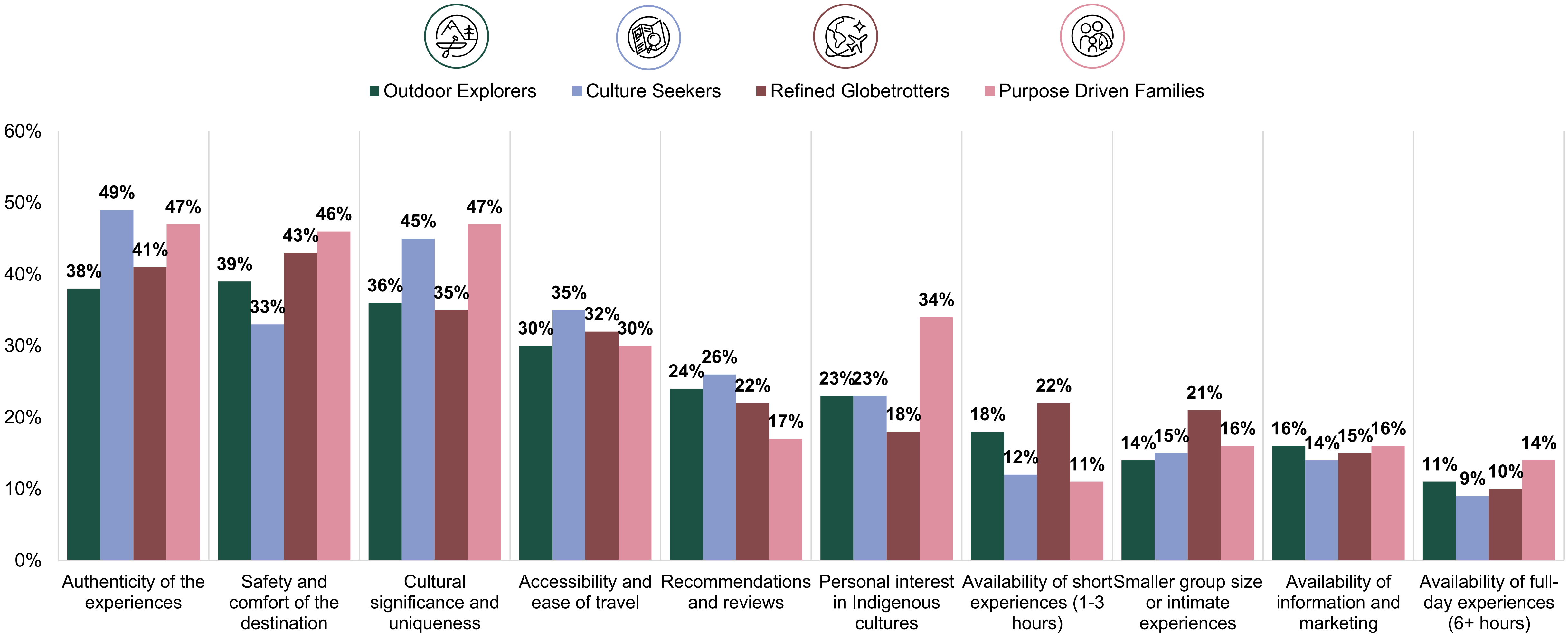


Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=760); Outdoor Explorers (n=141); Culture Seekers (n=169); Refined Globetrotters (n=150); Purpose Driven Families (n=58)
E13. How distinct is Canada as a winter travel destination?

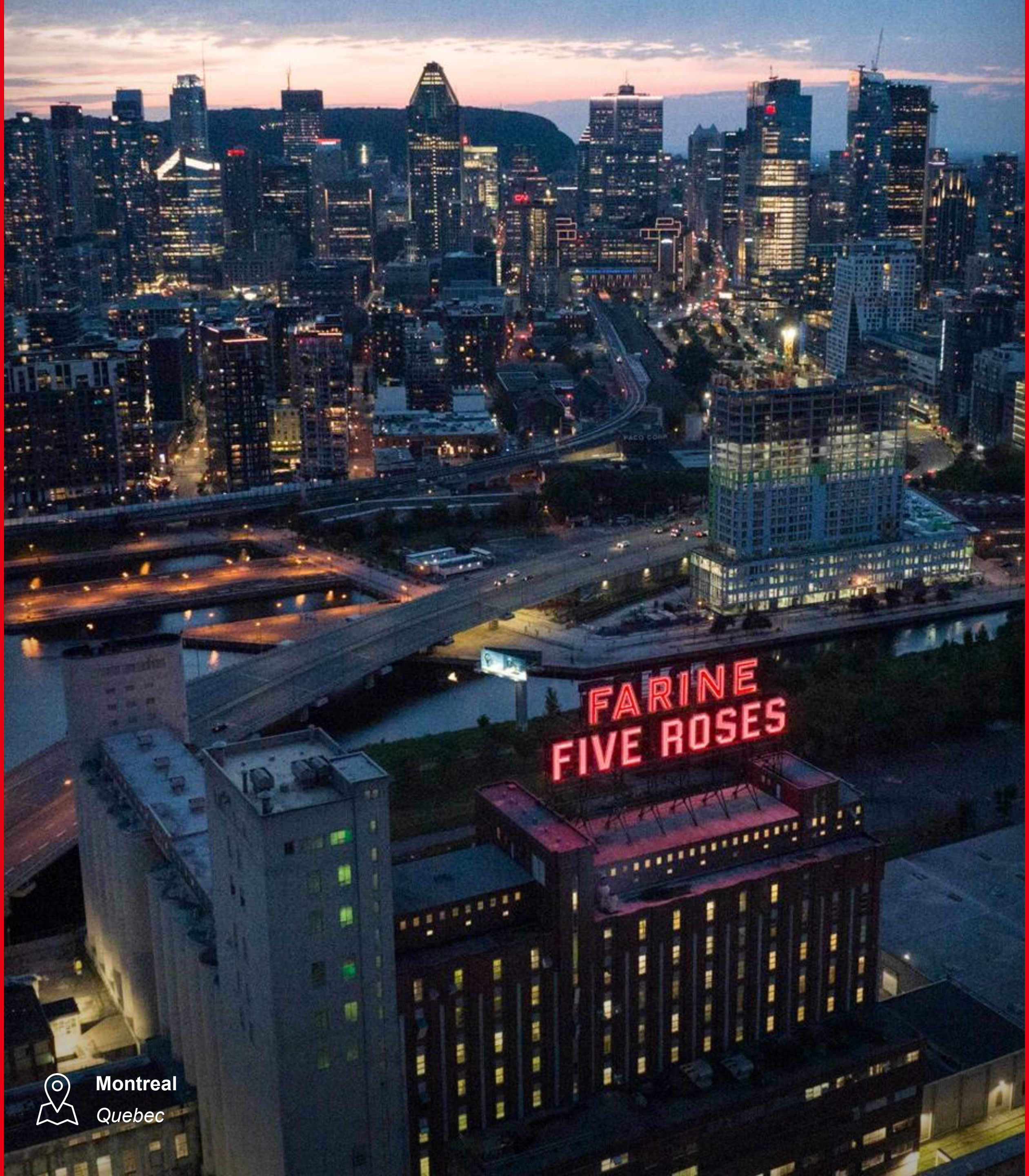
INDIGENOUS TRAVEL

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES: BY SEGMENTS

Authenticity of experiences and cultural significance are key for CSs.



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): Outdoor Explorers (n=143); Culture Seekers (n=168); Refined Globetrotters (n=148); Purpose Driven Families (n=57)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)



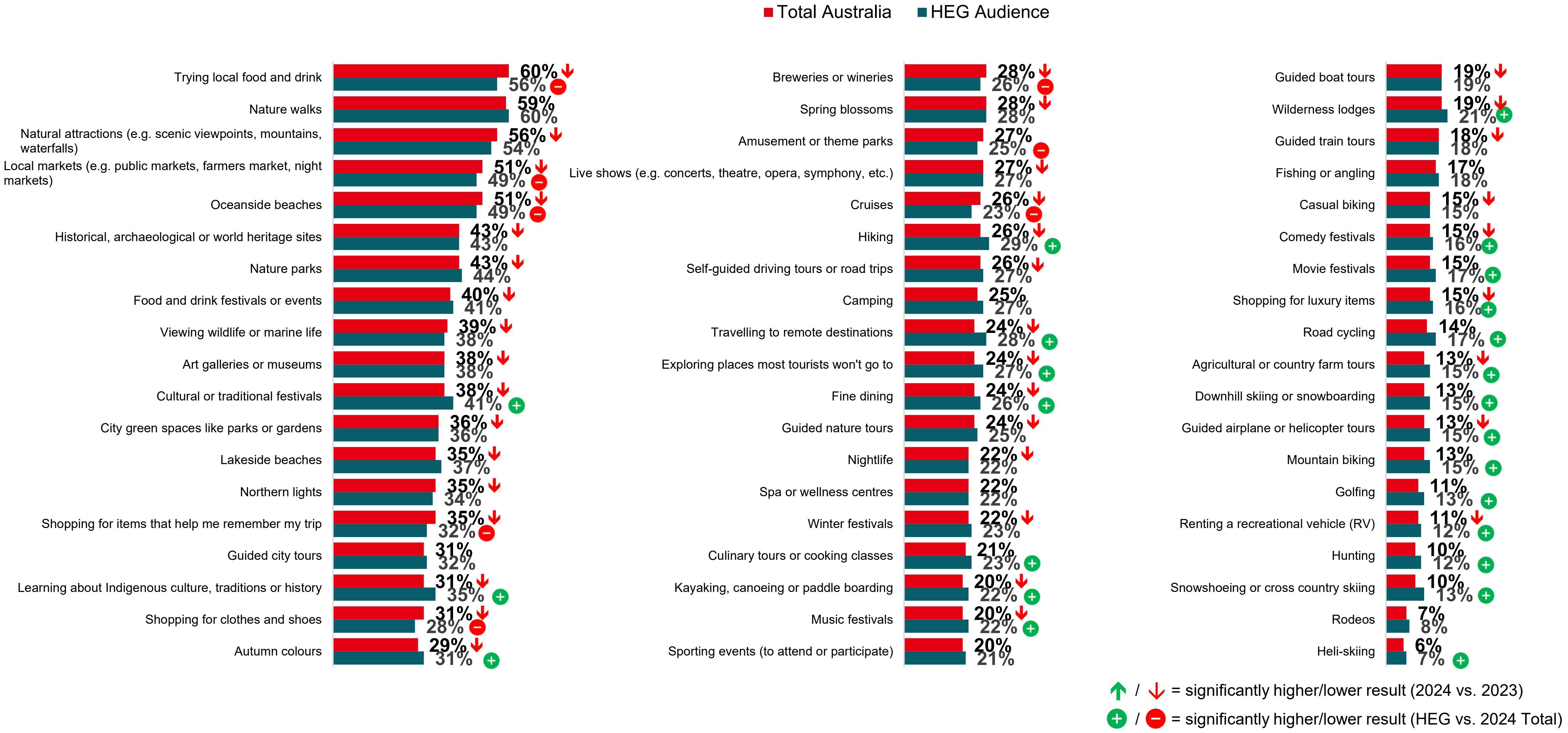
DESTINATION CANADA

TRAVEL BEHAVIOURS

GENERAL ACTIVITIES INTERESTED IN

DESTINATION CANADA

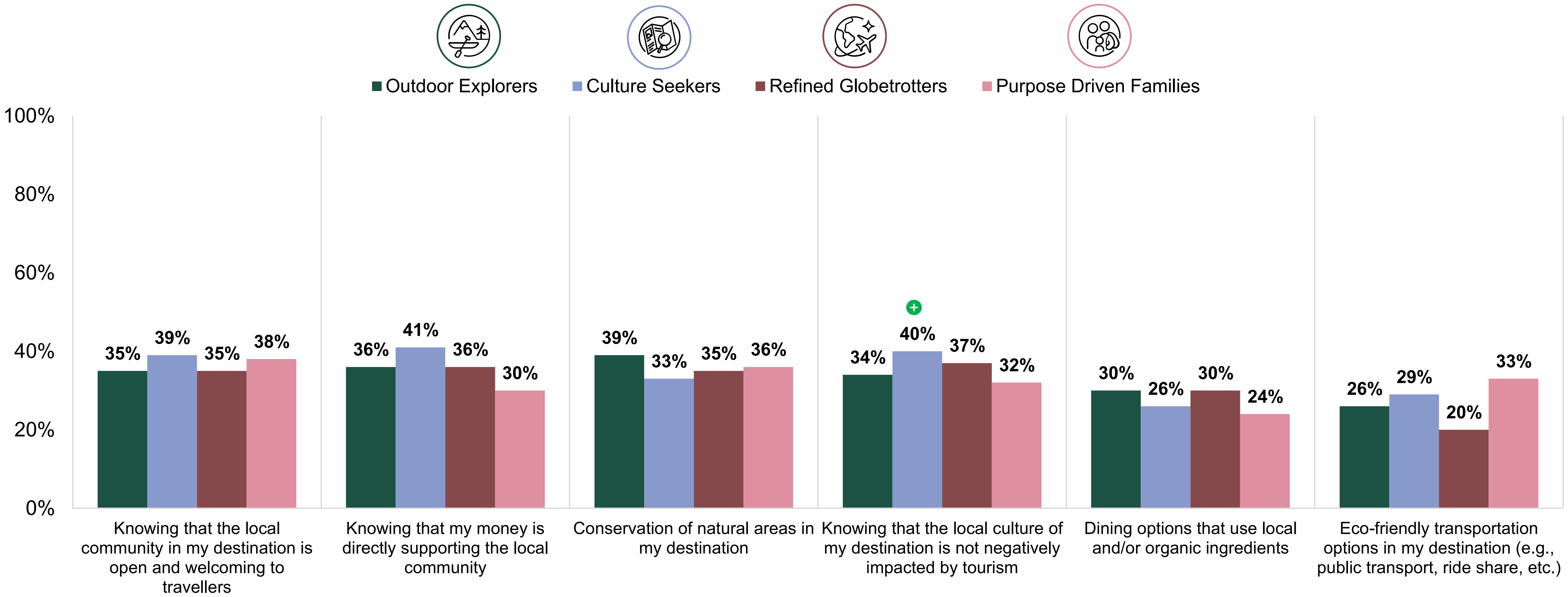
Australians, particularly the HEG audience, show declining interest in travel activities like trying local foods, local markets, and oceanside beaches. However, these activities (along with nature walks/attractions) continue to be top ranking.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510); HEG (n=1039)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

MOST IMPORTANT SUSTAINABILITY EFFORTS (TOP 6): BY SEGMENTS

As it relates to sustainability efforts, CSs place stronger emphasis on knowing that the local culture is not negatively impacted by tourism.



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): Outdoor Explorers (n=135); Culture Seekers (n=197); Refined Globetrotters (n=128); Purpose Driven Families (n=63)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

+ / – = significantly higher/lower result (Segments vs. 2024 Total)

BARRIERS TO SUSTAINABLE TRAVEL

Lack of information and higher costs are the primary barriers to sustainable travel for both the total Australian audience and the HEG segment. Of note, mentions of cost have decreased and are generally lower among HEGs.

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".

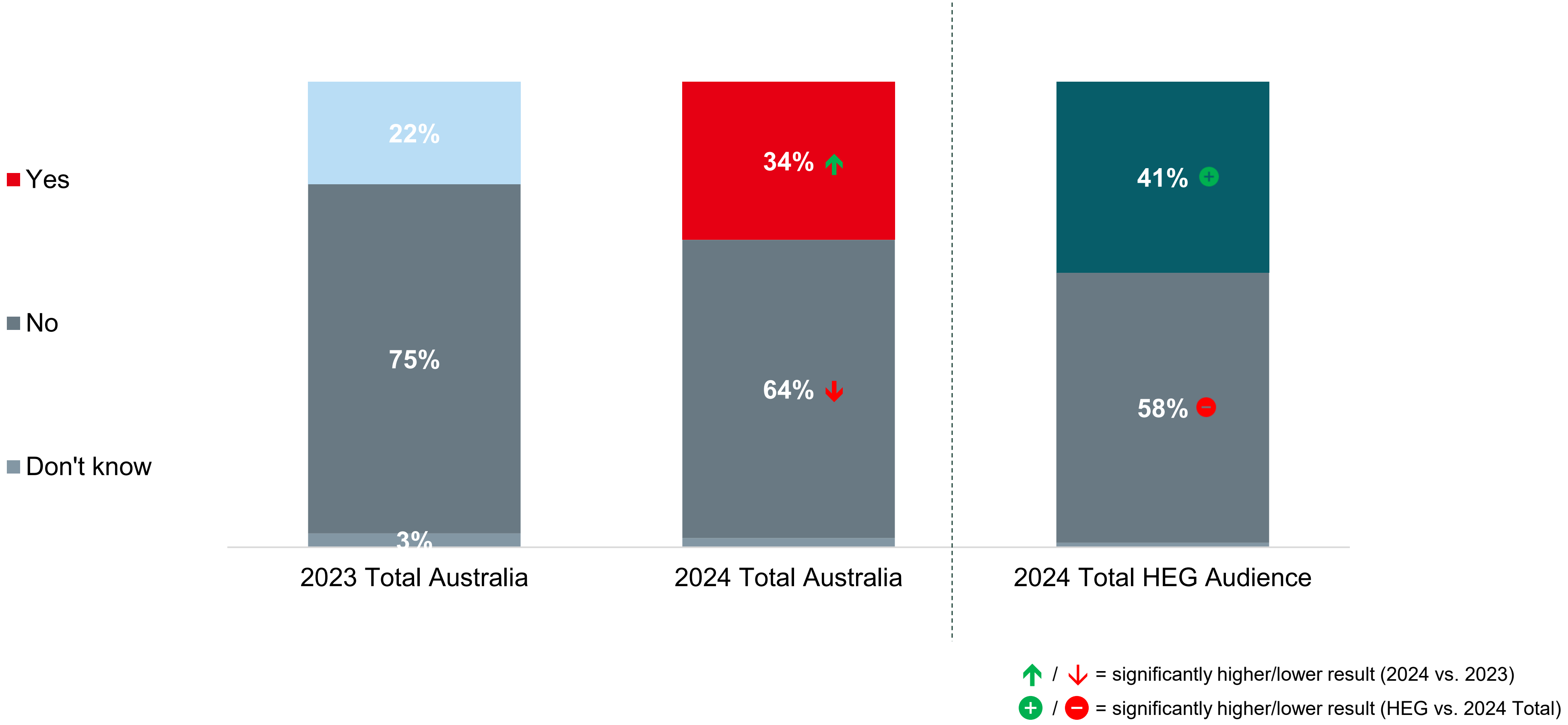
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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=735); HEG (n=516)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

USAGE OF AI TOOLS TO PLAN TRIPS

About one-third of Australian travellers have used AI tools to plan a trip, marking an increase from the previous year.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1510); HEG (n=1039)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

Summerside

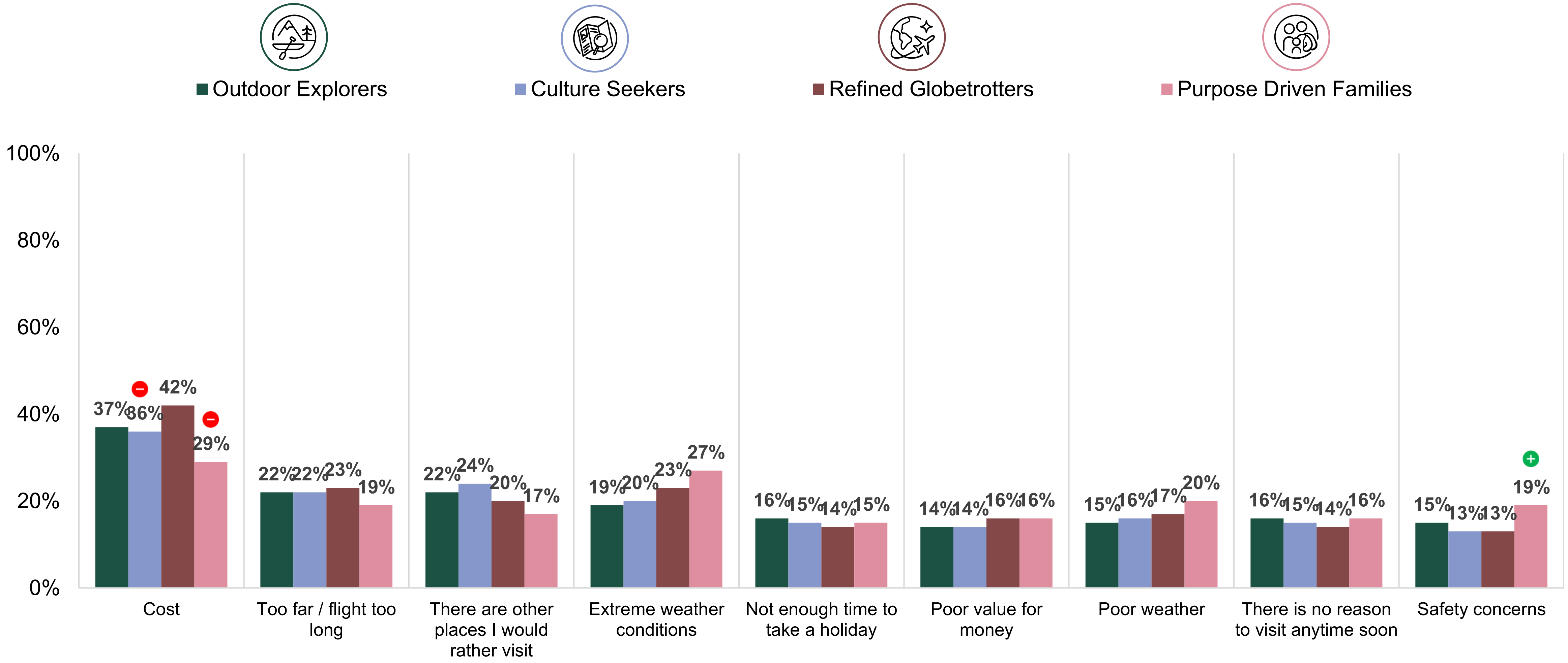
Prince Edward Island

CANADA TRAVEL BARRIERS AND MOTIVATORS

BARRIERS FOR TRAVEL TO CANADA (TOP 9): BY SEGMENTS

DESTINATION CANADA

Price is the main barrier for travel to Canada across all segments, but it is relatively lower among CSs.



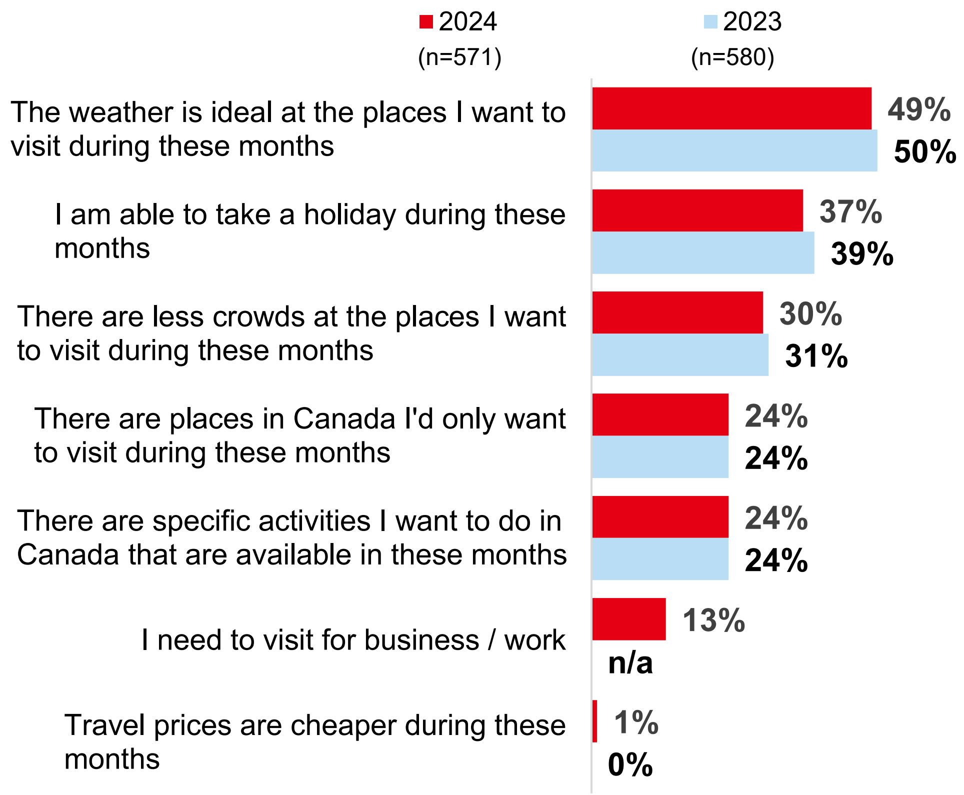
Base: Long-haul pleasure travellers (past 3 years or next 2 years) Outdoor Explorers (n=288); Culture Seekers (n=347); Refined Globetrotters (n=274); Purpose Driven Families (n=130)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

+ / – = significantly higher/lower result (HEG vs. 2024 Total)

MOTIVATORS & BARRIERS FOR FALL TRAVEL TO CANADA

One-half of Australian Travellers are motivated by the ideal weather in Canada for Fall travel. Barriers vary, including availability and lack of knowledge of available activities.

Motivators for Fall Travel



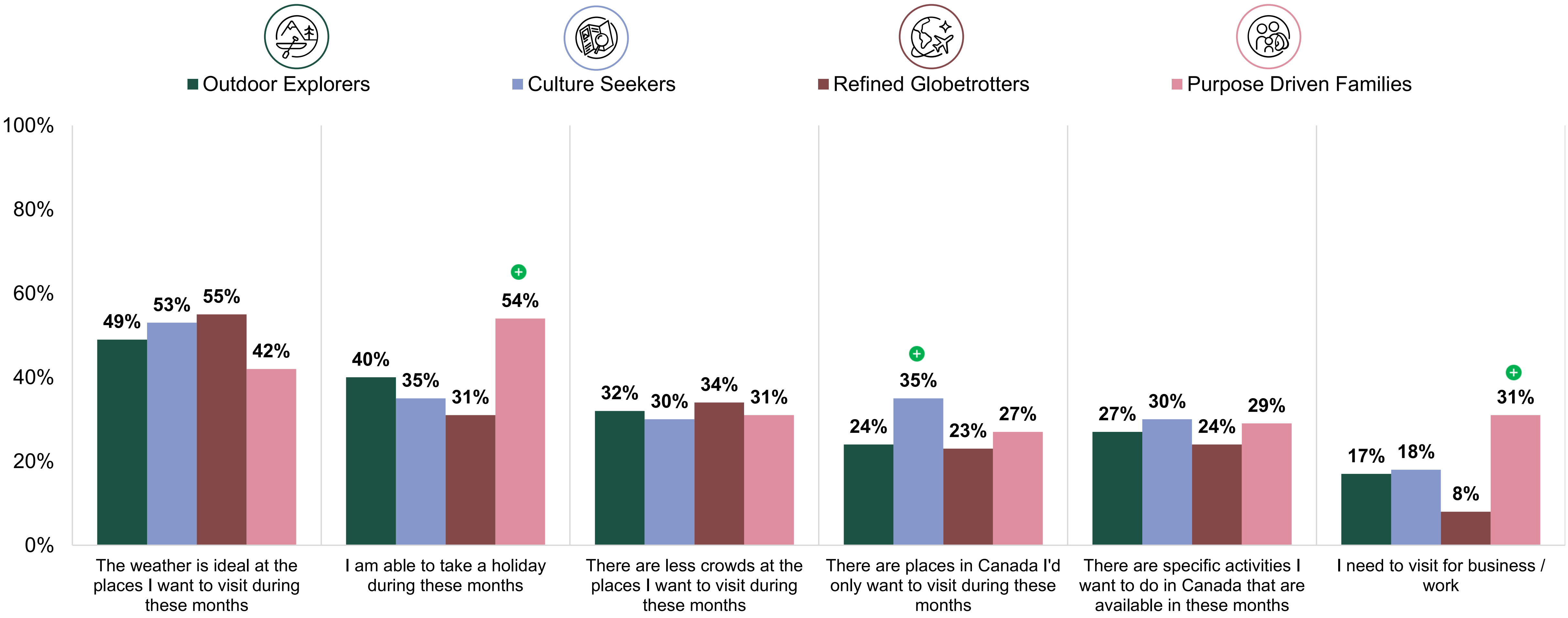
Barriers for Fall Travel

Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>considering</u> visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>not considering</u> visiting Canada or any province/territory in September, October or November
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

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

MOTIVATORS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

For most segments (including CSs), the ideal Fall weather is a top motivator for travel to Canada. Further, CSs over index vs. other segments on their claim that there are places in Canada they only want to visit during the Fall months.



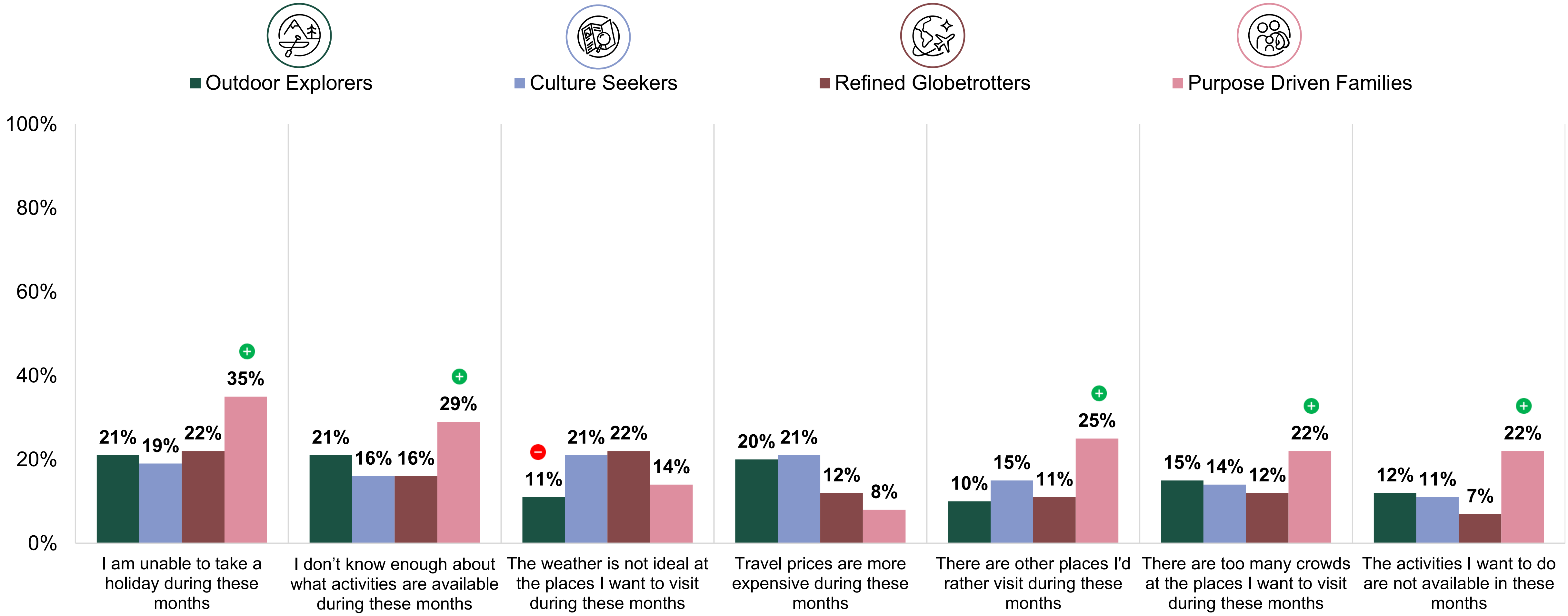
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=113); Culture Seekers (n=148); Refined Globetrotters (n=105); Purpose Driven Families (n=52)
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these autumn **months**?

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

BARRIERS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

DESTINATION CANADA

For Fall travel to Canada, Purpose-Driven Families face the highest barriers, including limited holiday availability and uncertainty about activities, while Culture Seekers, Outdoor Explorers, and Refined Globetrotters report relatively lower concern.



Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=86); Culture Seekers (n=123); Refined Globetrotters (n=99); Purpose Driven Families (n=51)
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

MOTIVATORS & BARRIERS FOR WINTER TRAVEL TO CANADA

DESTINATION CANADA

In 2024, weather suitability and holiday availability remain top motivators for Winter travel to Canada, while for others cold weather persists as the primary barrier.

Motivators for Winter Travel

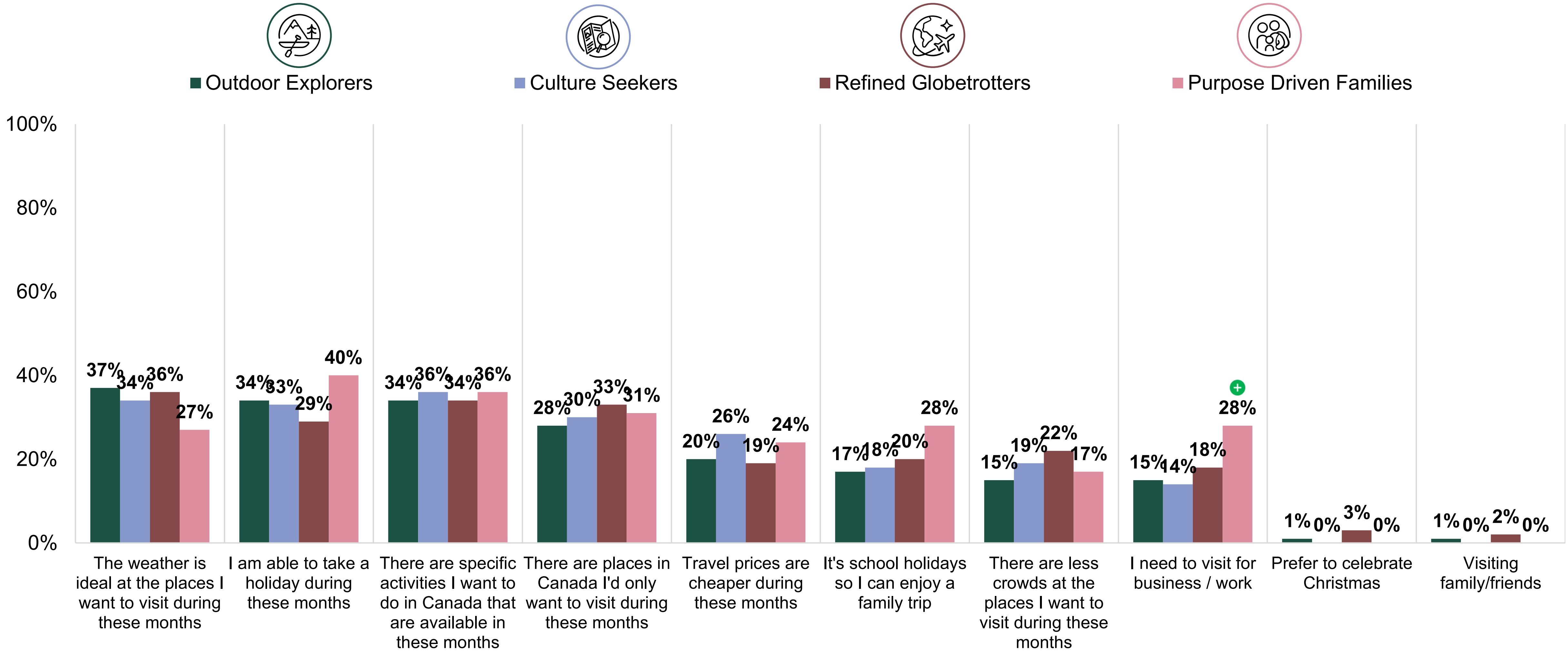
Barriers for Winter Travel

Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?
*Small base size, interpret with caution (n<50)

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

MOTIVATORS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

Overall, motivation for Winter travel to Canada is similar across segments. One exception is that PDFs are more likely to have a need to visit for business/work.

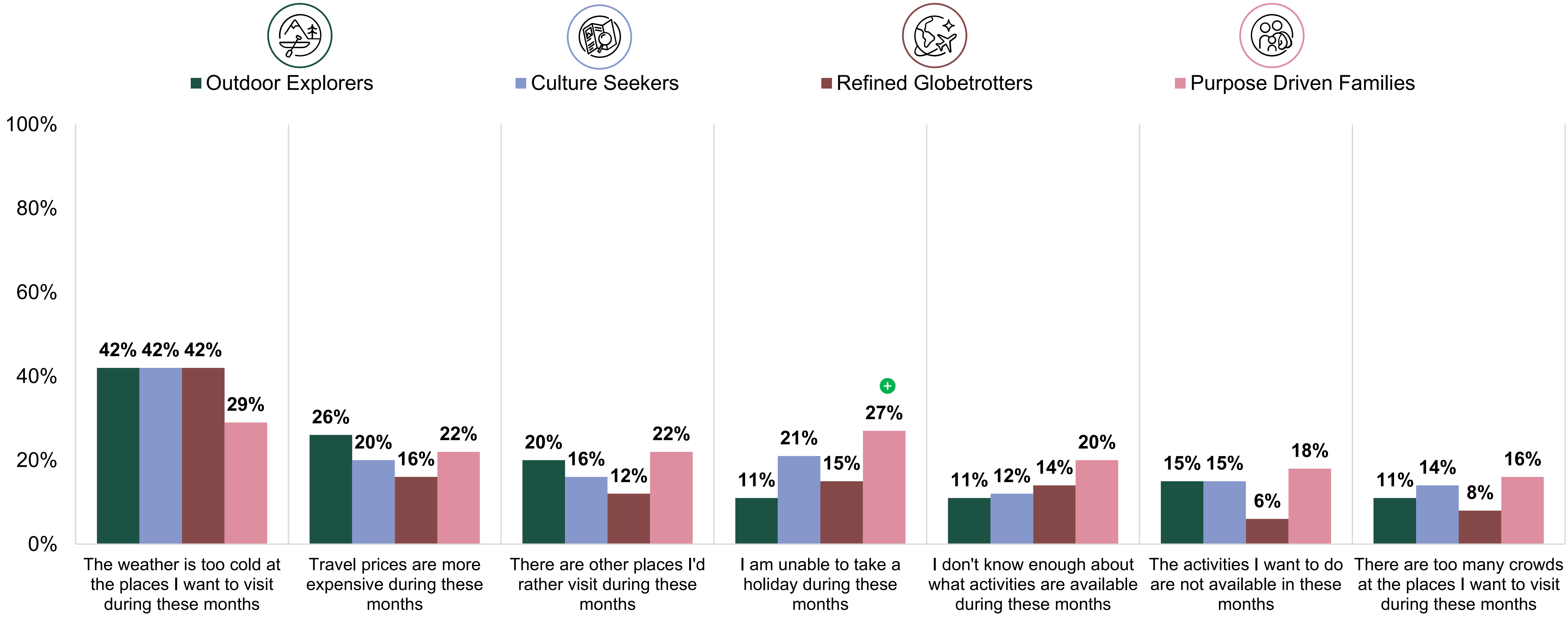


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February: Outdoor Explorers (n=101); Culture Seekers (n=141); Refined Globetrotters (n=95); Purpose Driven Families (n=58)
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

BARRIERS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

Cold weather is the primary barrier to Winter travel across all segments, although lowest among PDFs. PDFs cite limited holiday availability as a significant challenge compared to other segments.



Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February: Outdoor Explorers (n=98); Culture Seekers (n=130); Refined Globetrotters (n=109); Purpose Driven Families (n=45*)
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?
*Small base size, interpret with caution (n<50)

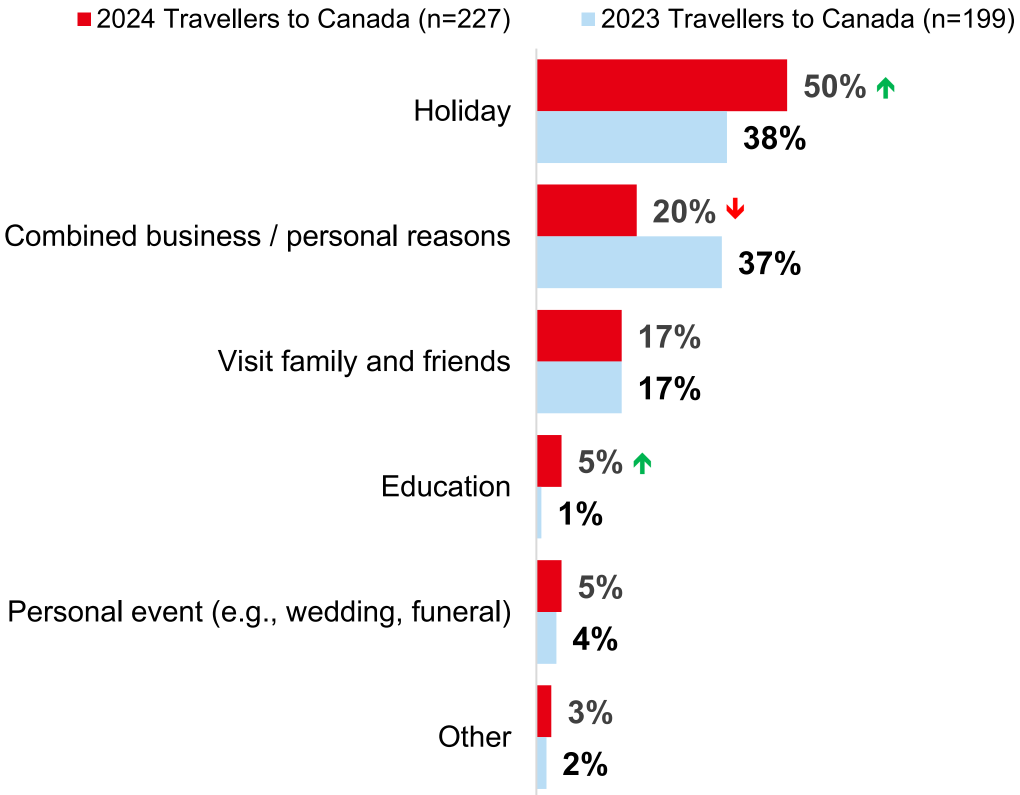
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

MOST RECENT TRIP

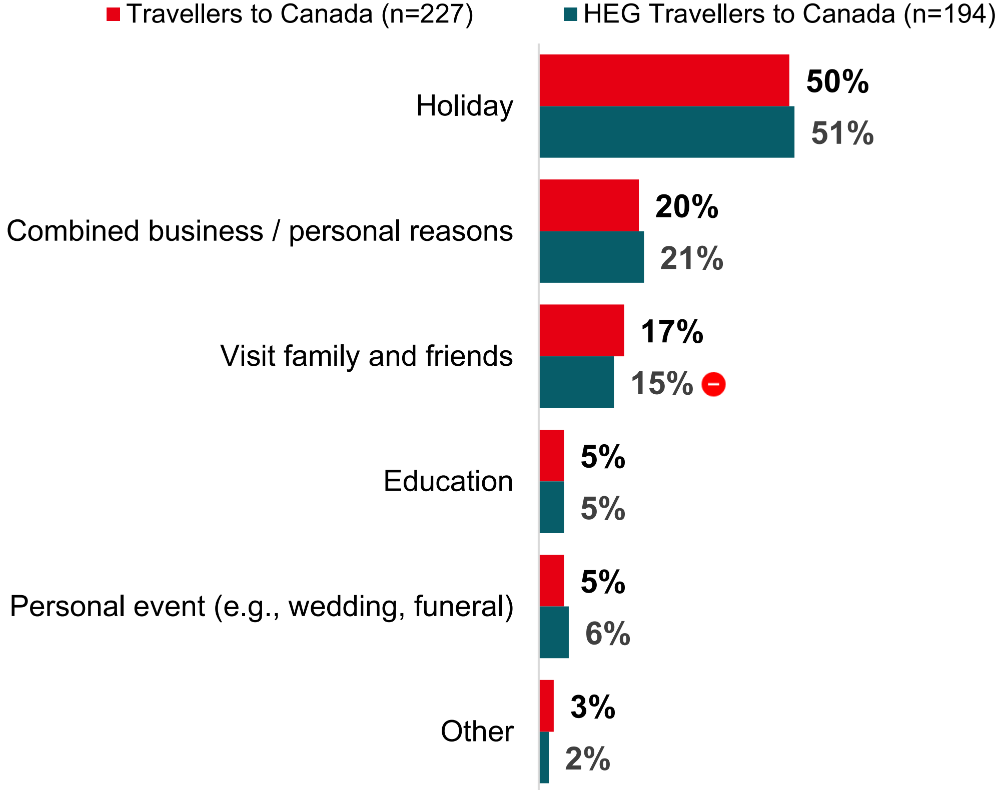
MAIN PURPOSE OF RECENT TRIP

Holiday travel to Canada increased significantly compared to previous year while combined business/personal travel declined.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



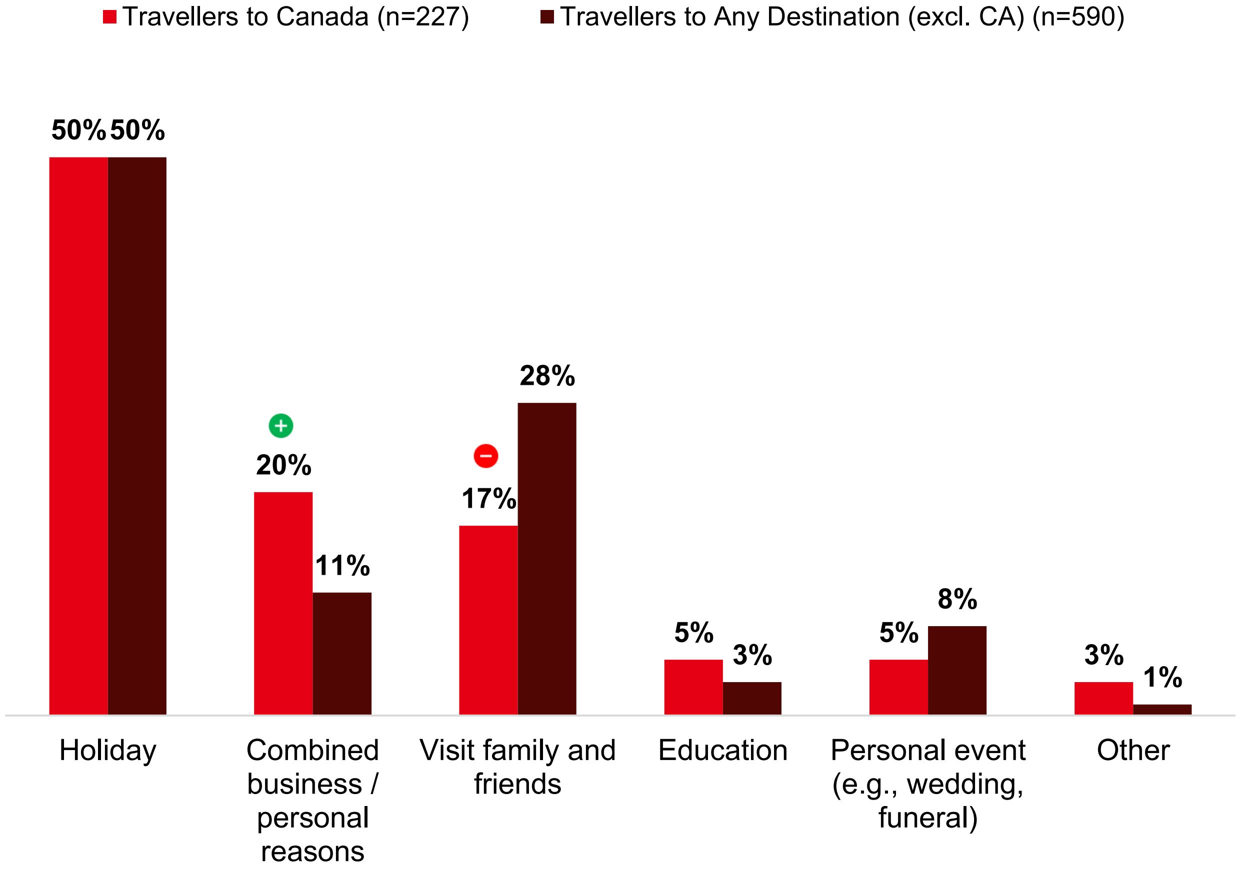
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

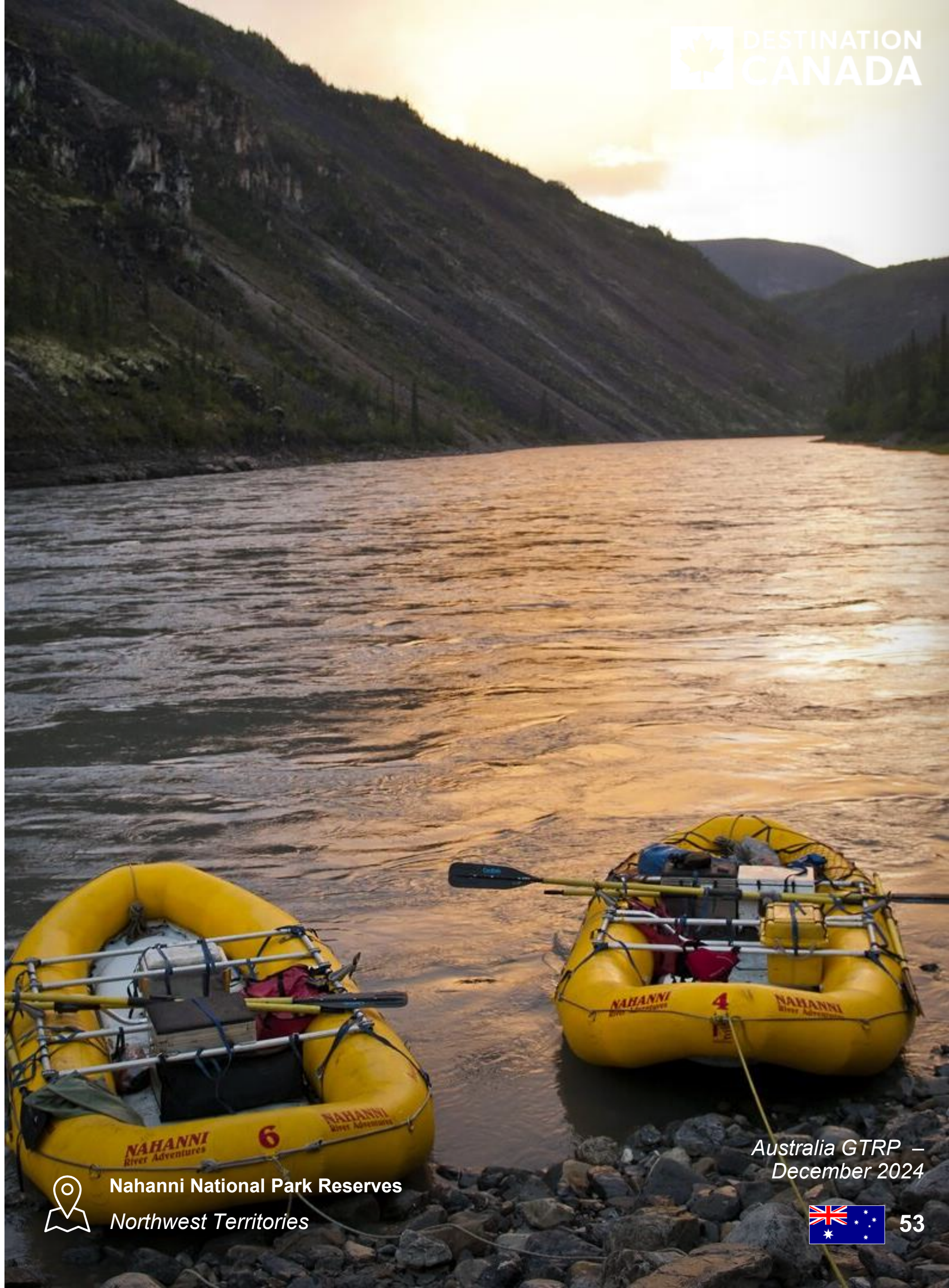
MAIN PURPOSE OF RECENT TRIP: BY DESTINATION

Combined business/personal trips were more common to Canada compared to other destinations. Conversely, visiting with family/friends was less common.



+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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

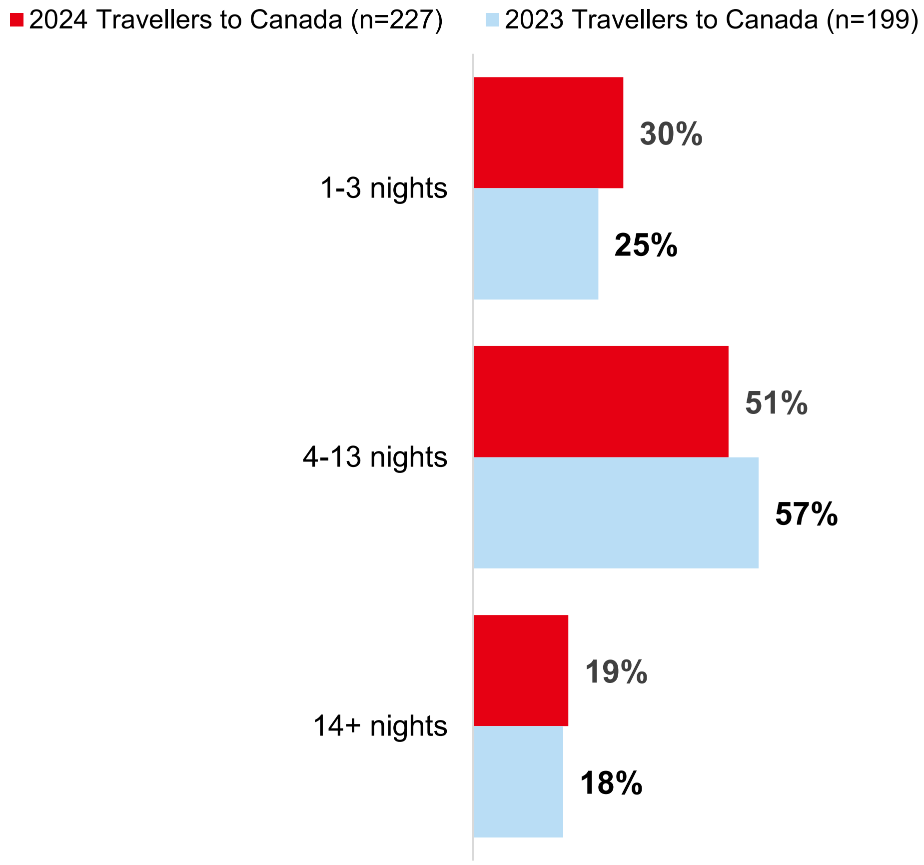


Nahanni National Park Reserves
Northwest Territories

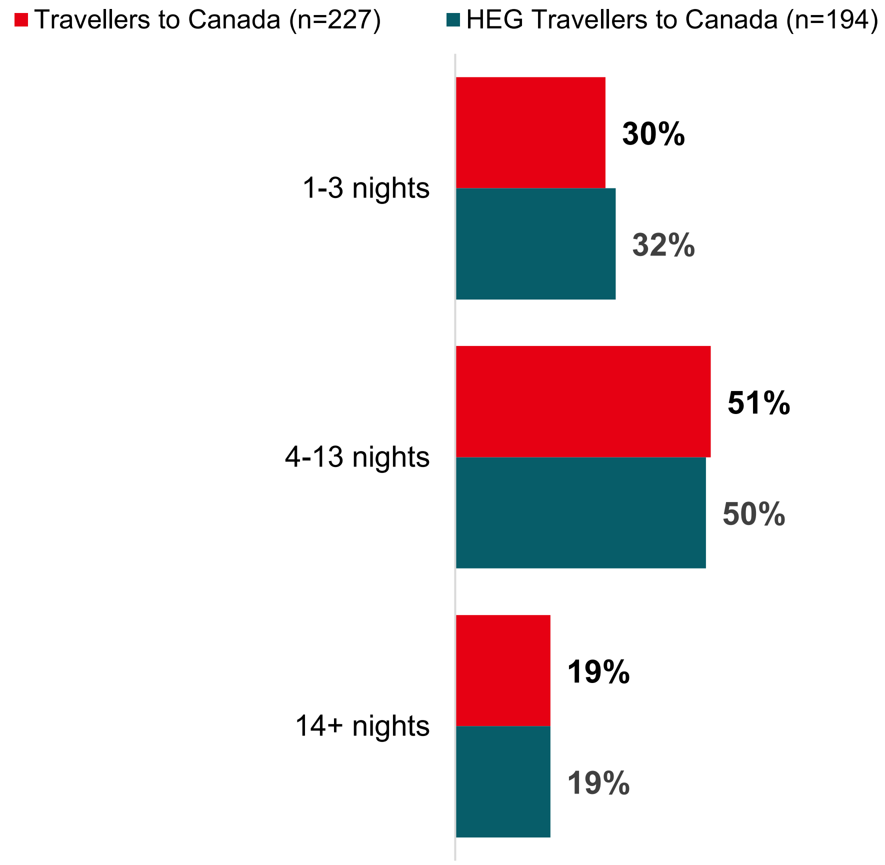
NIGHTS SPENT DURING RECENT TRIP

Most trips Australians took to Canada lasted 4–13 nights. Trip duration was similar among Total Travellers and HEGs alike.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



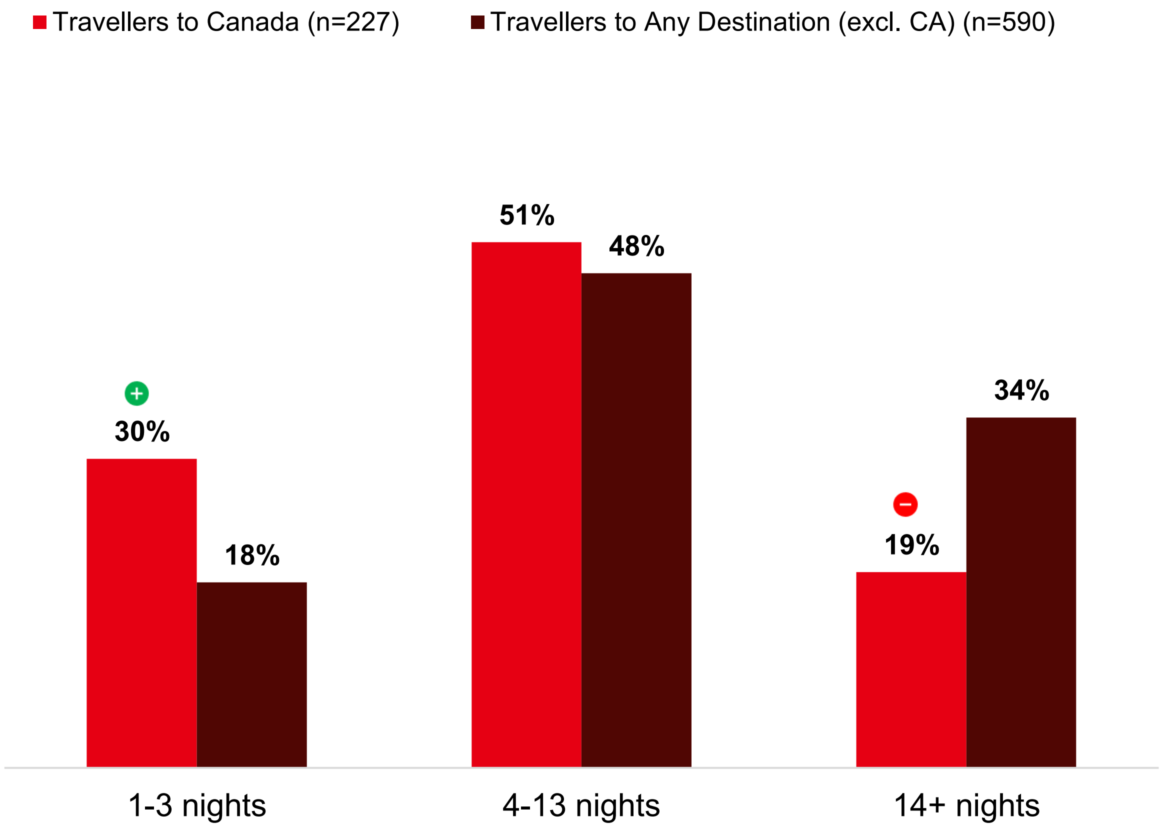
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

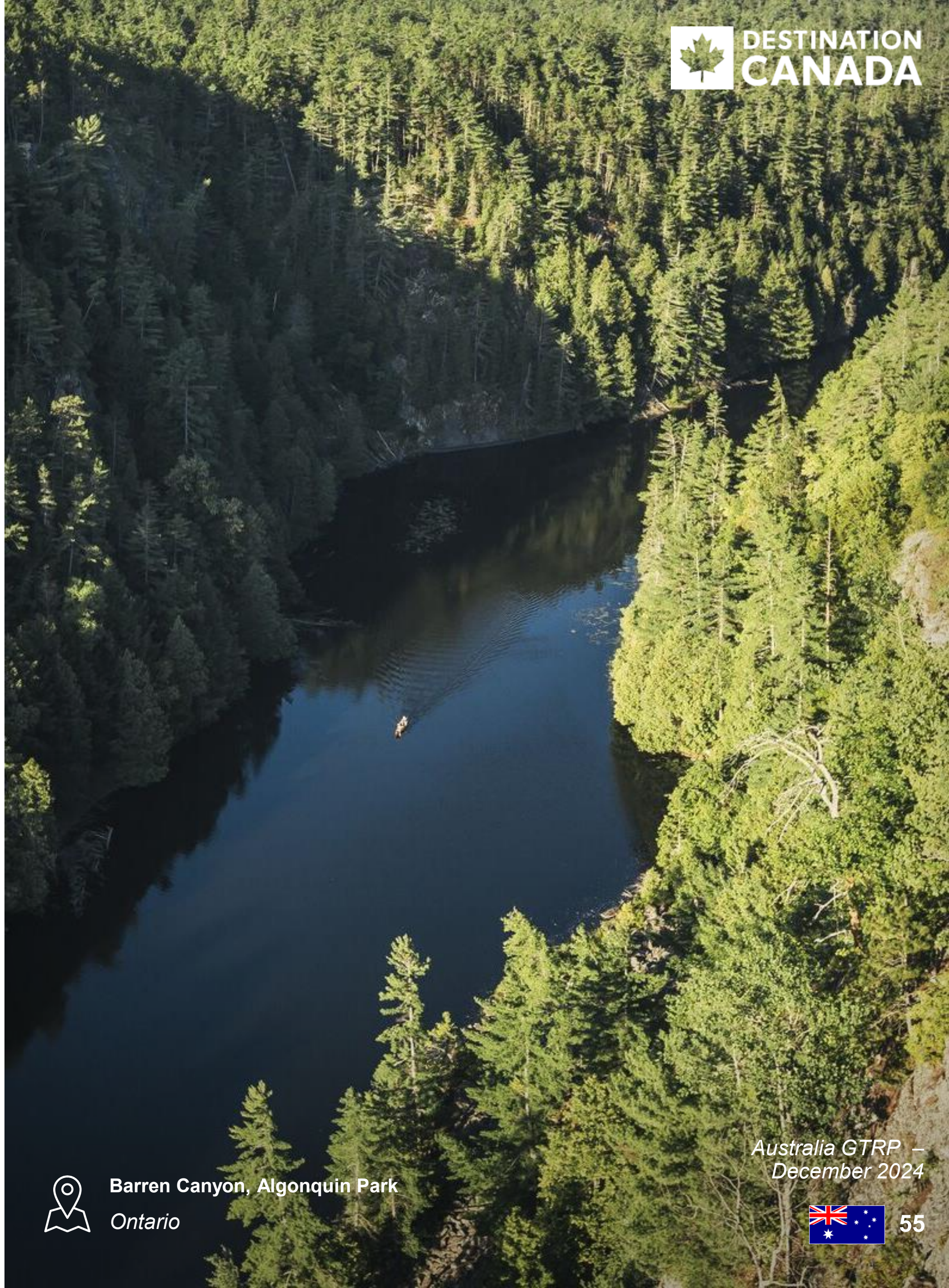
NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION

As with Canada, most Australians travel to other destinations for 4–13 nights. However, Australian travellers are more likely to stay for 1–3 nights in Canada, compared to those traveling to other destinations who favour longer stays of 14+ nights.



+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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

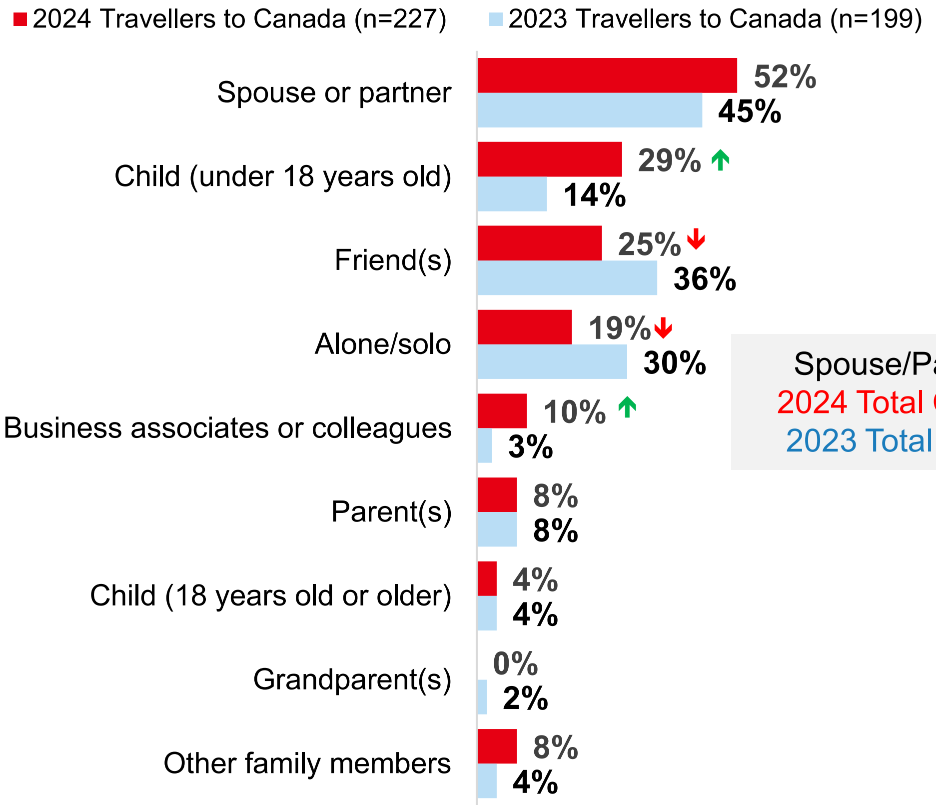


TRAVEL PARTY OF RECENT TRIP

DESTINATION CANADA

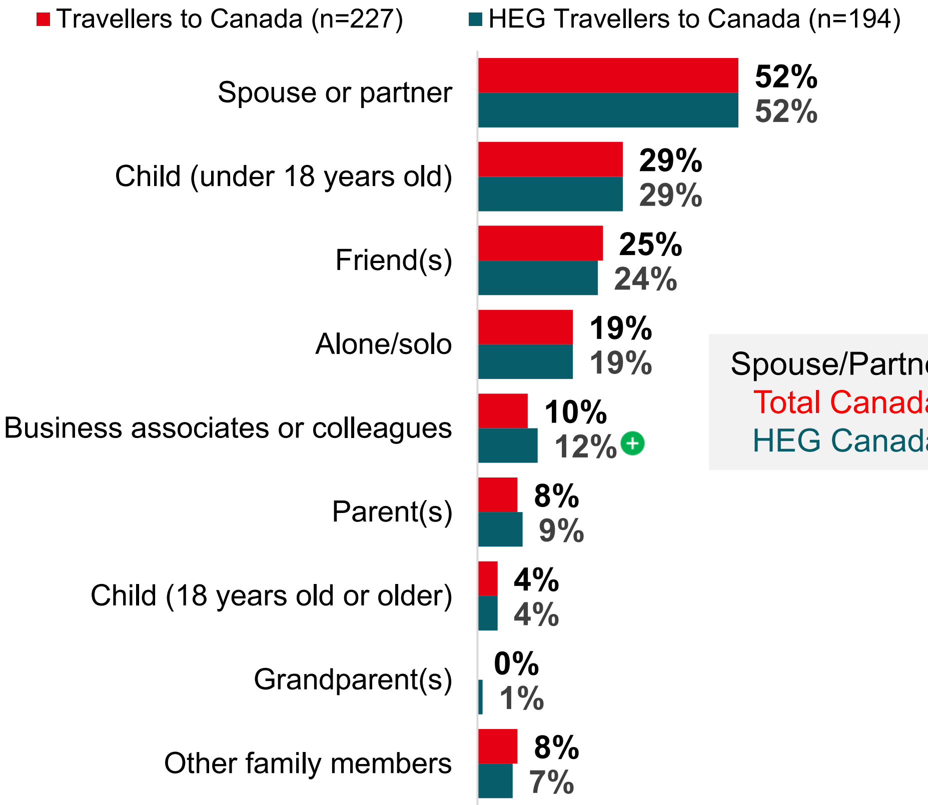
A notable increase is observed among Australians traveling to Canada with children under 18 and with business associates, while solo or friend-accompanied travel has softened. The HEG audience aligns closely with overall Australian travellers.

Total Travellers to Canada: Trended



Spouse/Partner ONLY
2024 Total Canada: 19% ↑
2023 Total Canada: 9%

Total Travellers to Canada vs. HEG Travellers to Canada



Spouse/Partner ONLY
Total Canada: 19%
HEG Canada: 21%

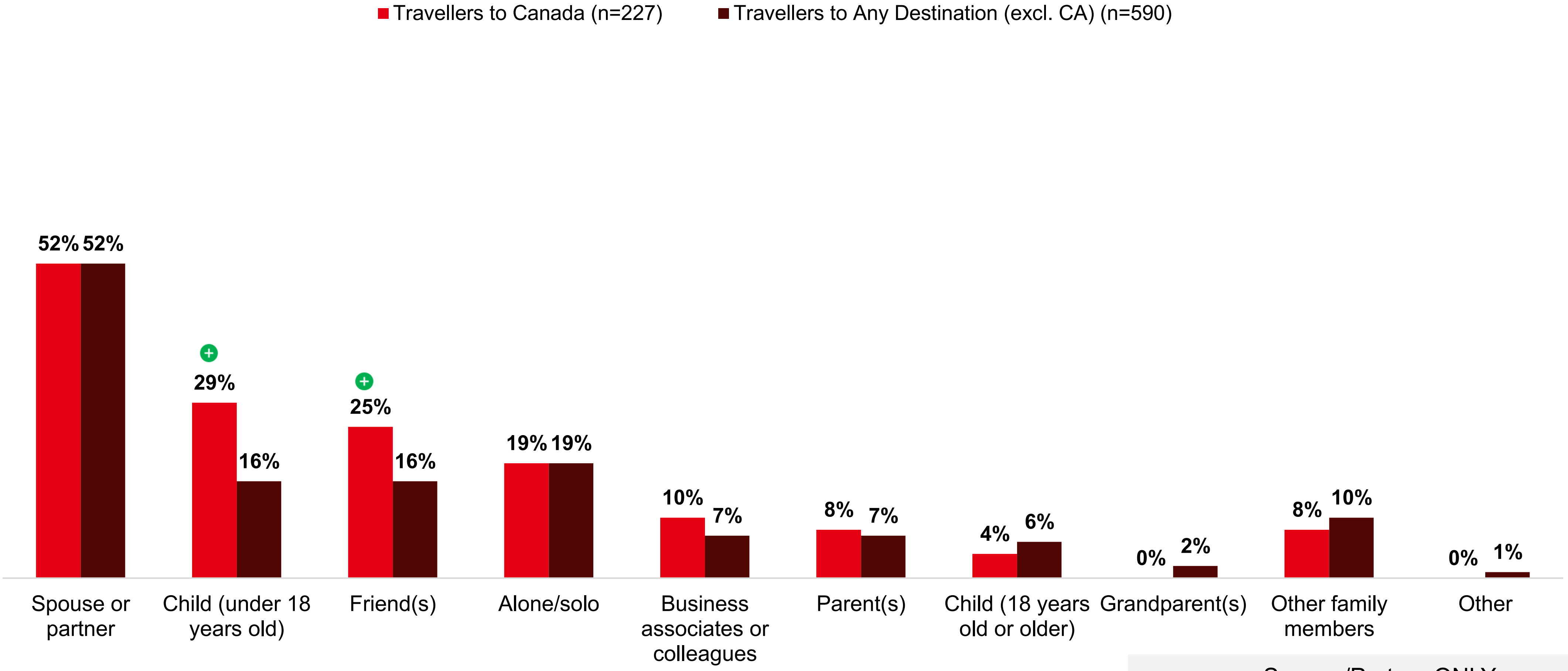
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL PARTY OF RECENT TRIP: BY DESTINATION

Similar to travellers to any destination, the majority of Australians traveling to Canada do so with their spouse or partner. Travel involving children under 18 and friends is significantly higher compared to other destinations.



Spouse/Partner ONLY
Travellers to Canada: 19%
Travellers to Any Destination (excl. CA): 31%

/ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP

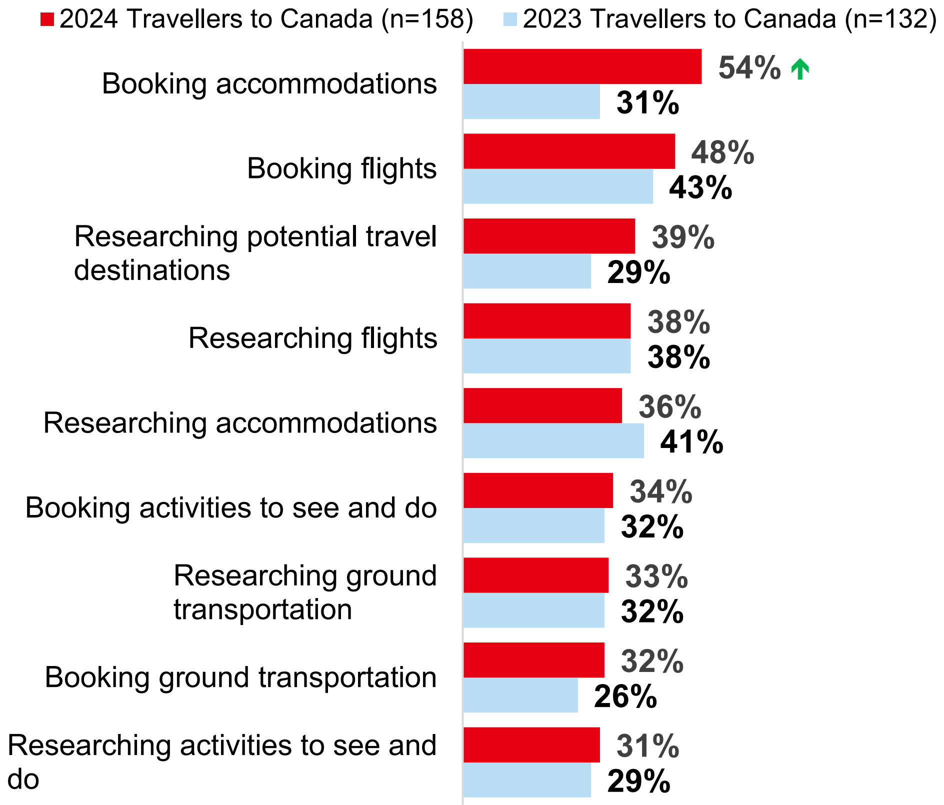
DESTINATION CANADA

About seven in ten Australian Travellers used a travel agent, with an increase this period of those using them for booking accommodations.

% Used a travel agent
2024 Total Canada: 70%
2023 Total Canada: 66%

Total Travellers to Canada: Trended

Among those who used a travel agent/tour operator



% Used a travel agent
Total Canada: 70%
HEG Canada: 71%

Total Travellers to Canada vs. HEG Travellers to Canada

Among those who used a travel agent/tour operator

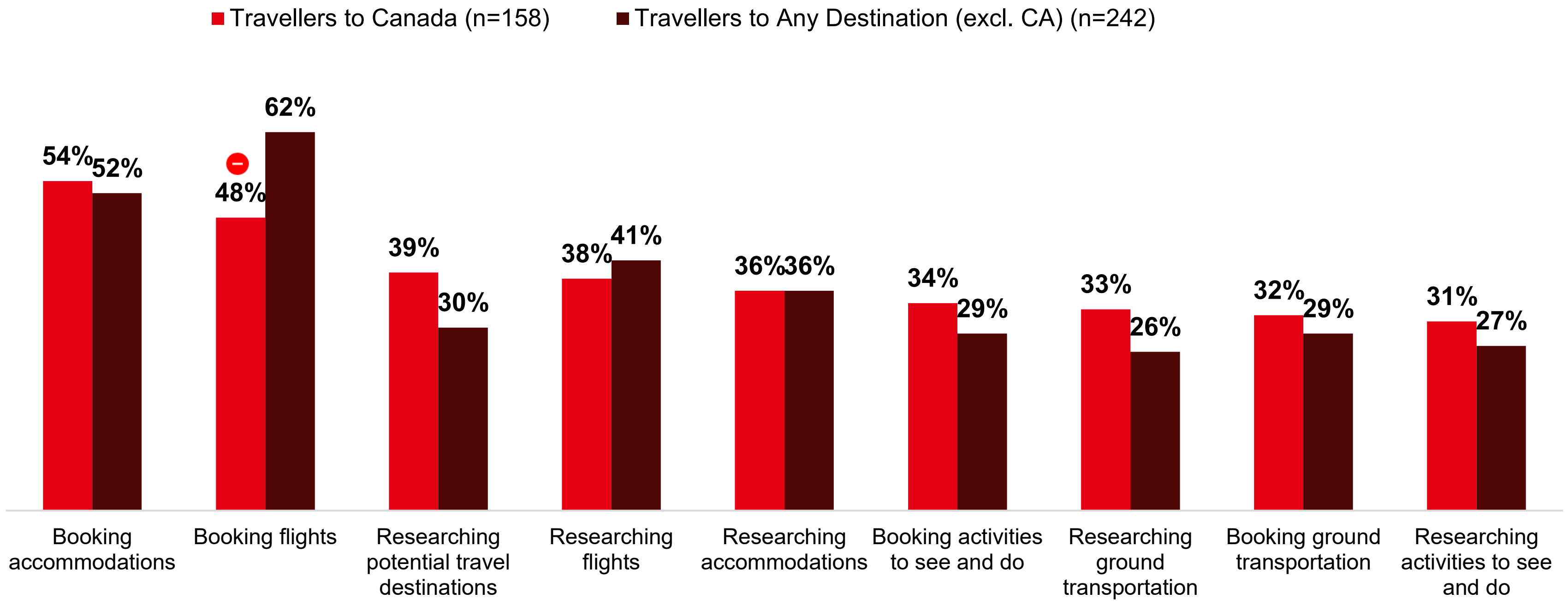
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing 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)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F10. Which of the following did a travel agent or tour operator help you with?

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

Travellers to Canada are more likely than travellers to other destinations to use a travel agent. They are, however, less likely to use them for booking flights to Canada.

% Used a travel agent
Travellers to Canada: 70% (+)
Travellers to Any Destination (excl. CA): 41%



(+) / (−) = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

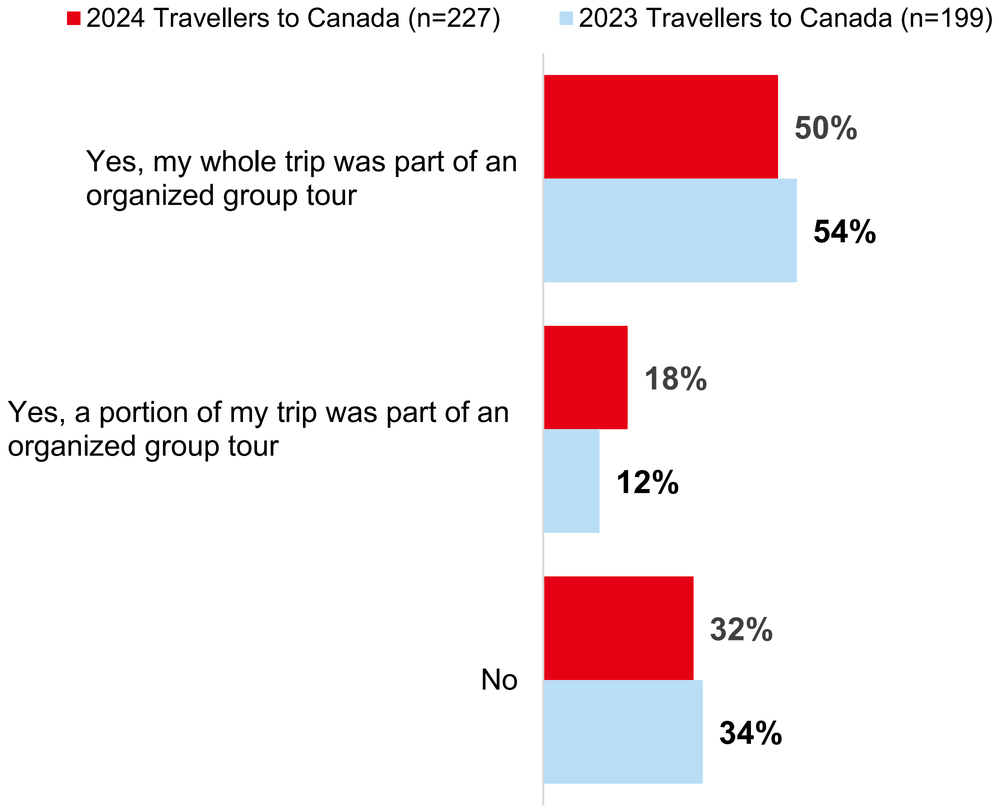
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and 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)
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
F10. Which of the following did a travel agent or tour operator help you with?

Twin Falls Lodge
Saskatchewan

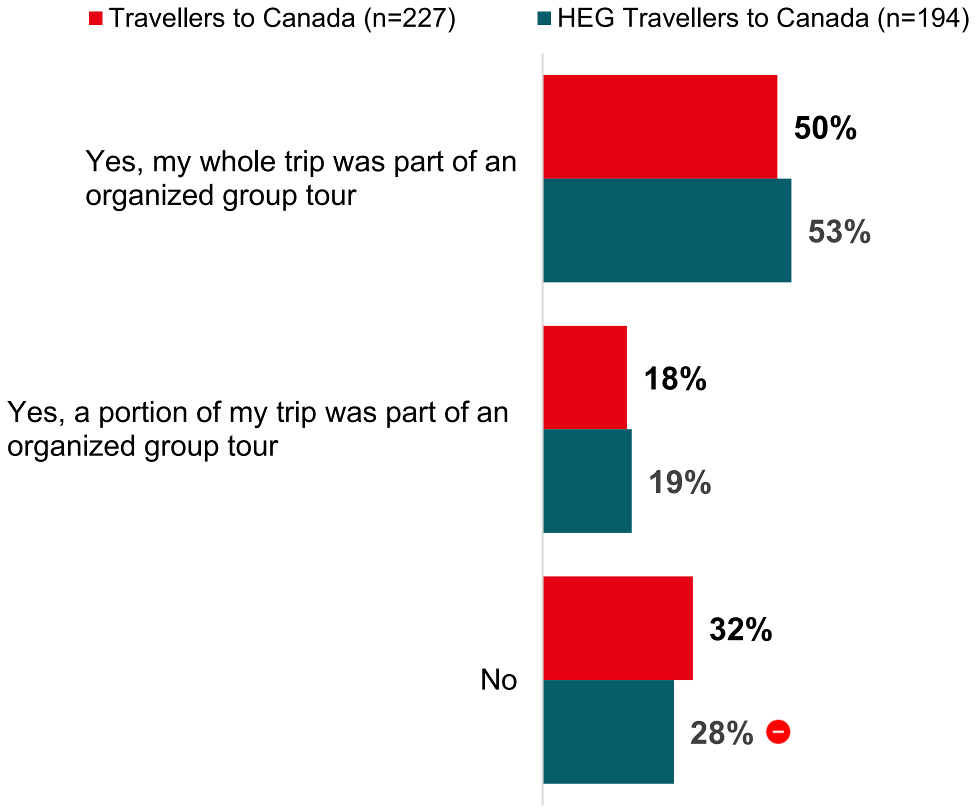
ORGANIZED GROUP TOUR USAGE FOR RECENT TRIP

Just over one-half of travellers had their whole trip to Canada as part of an organized group tour.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



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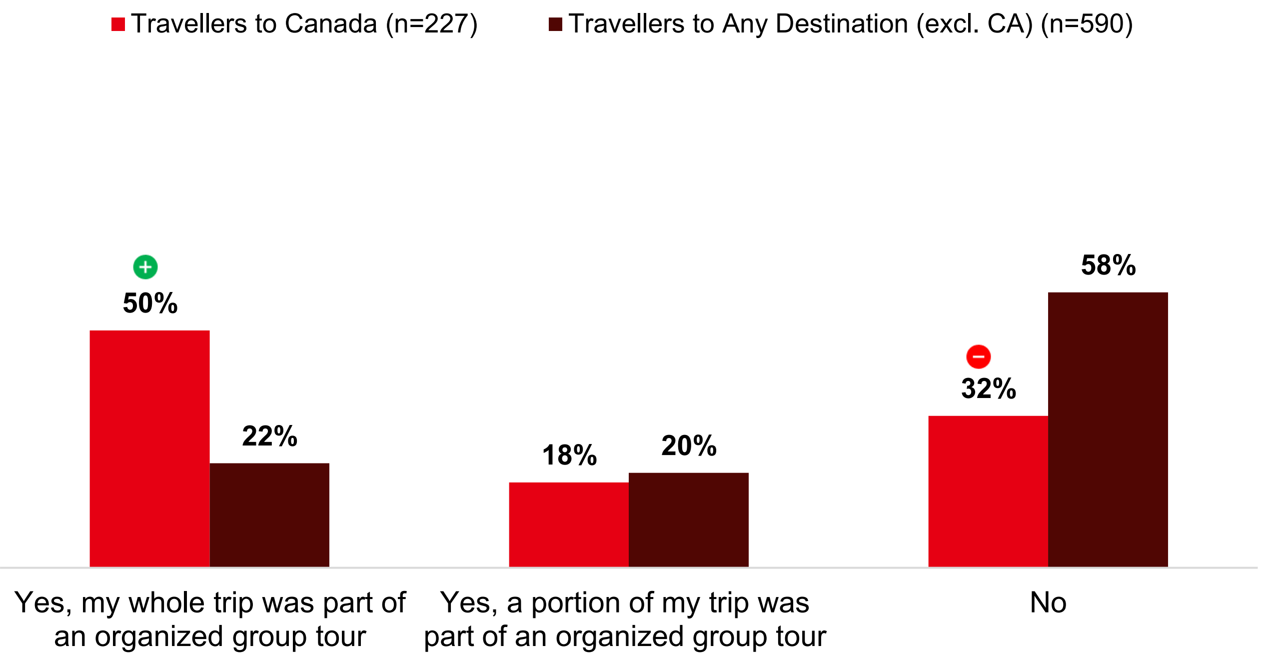
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
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?

ORGANIZED GROUP TOUR FOR RECENT TRIP: BY DESTINATION

Trips to Canada are more than two times as likely to be fully organized by a group tour.



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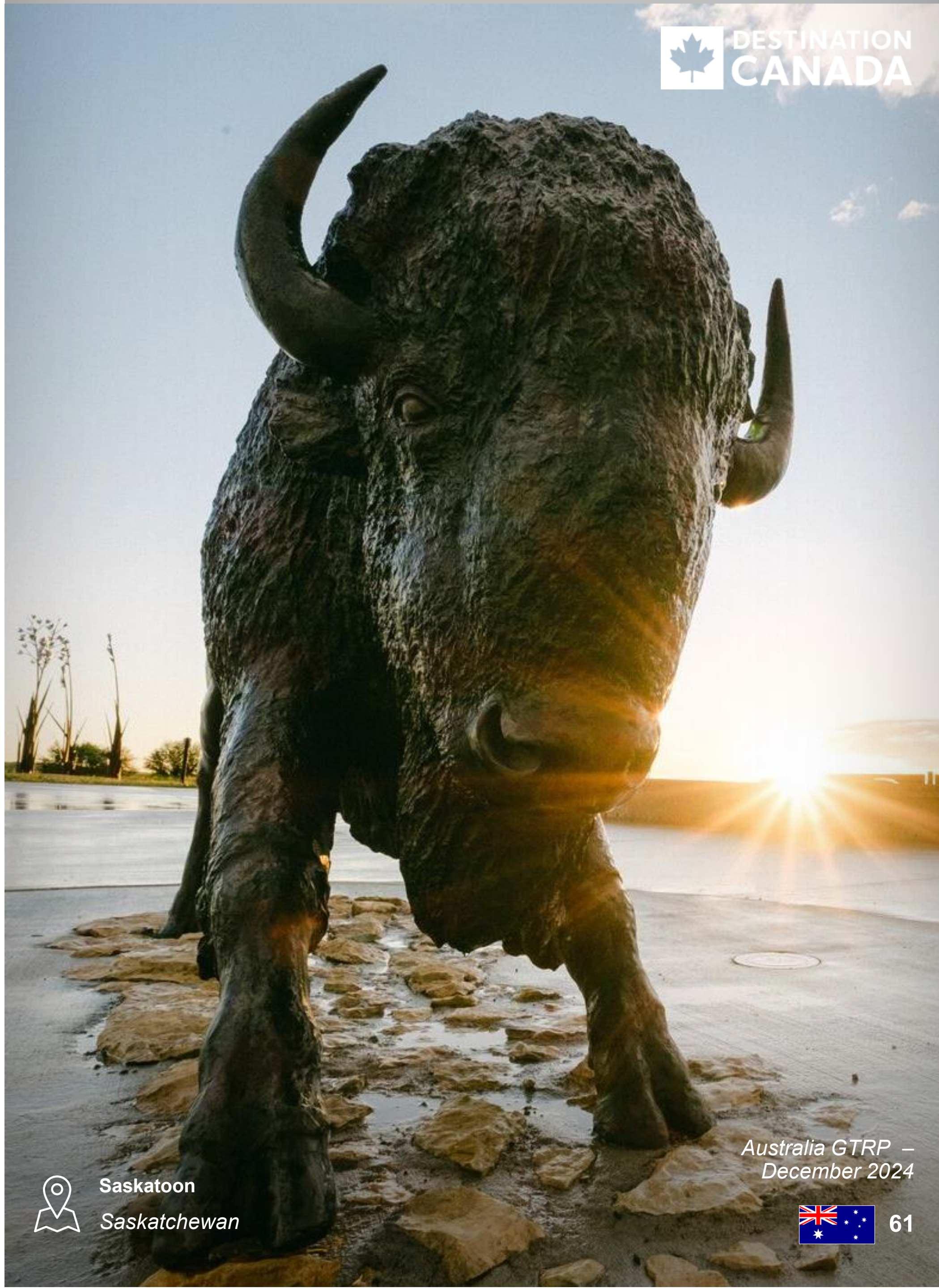
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part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

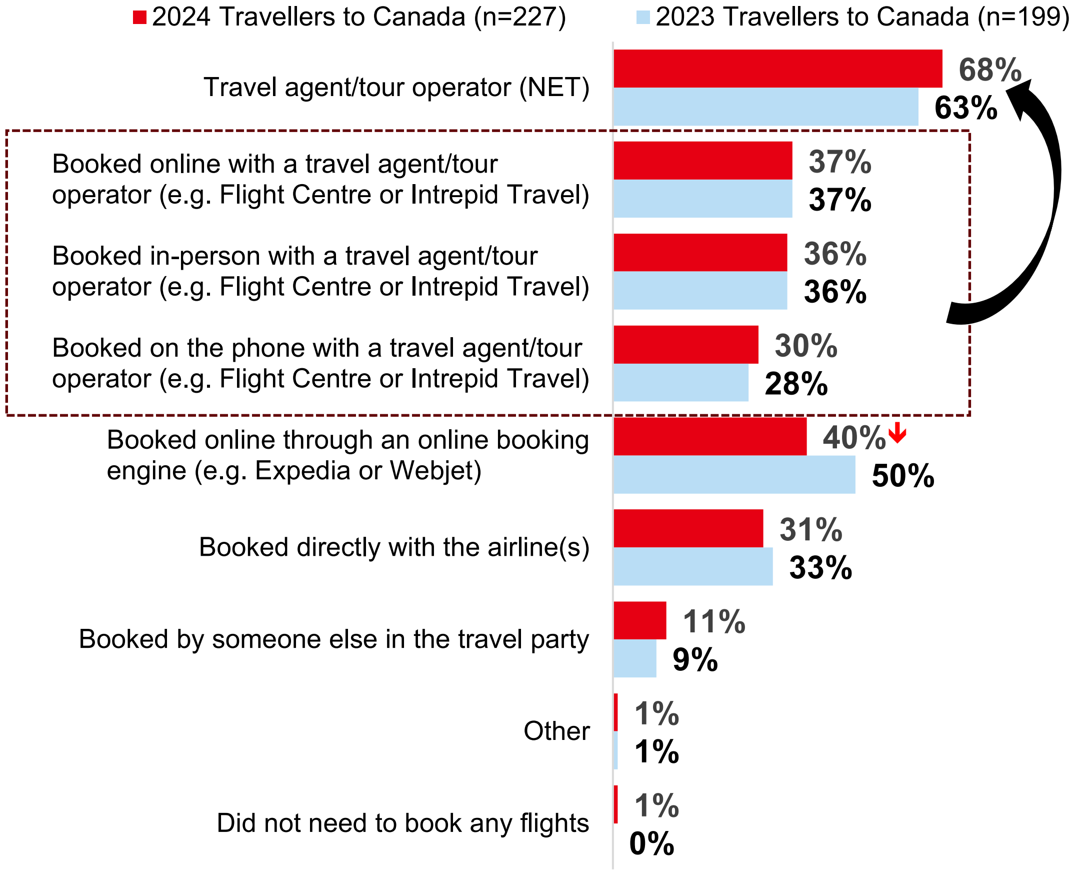


BOOKING FLIGHTS FOR RECENT TRIP

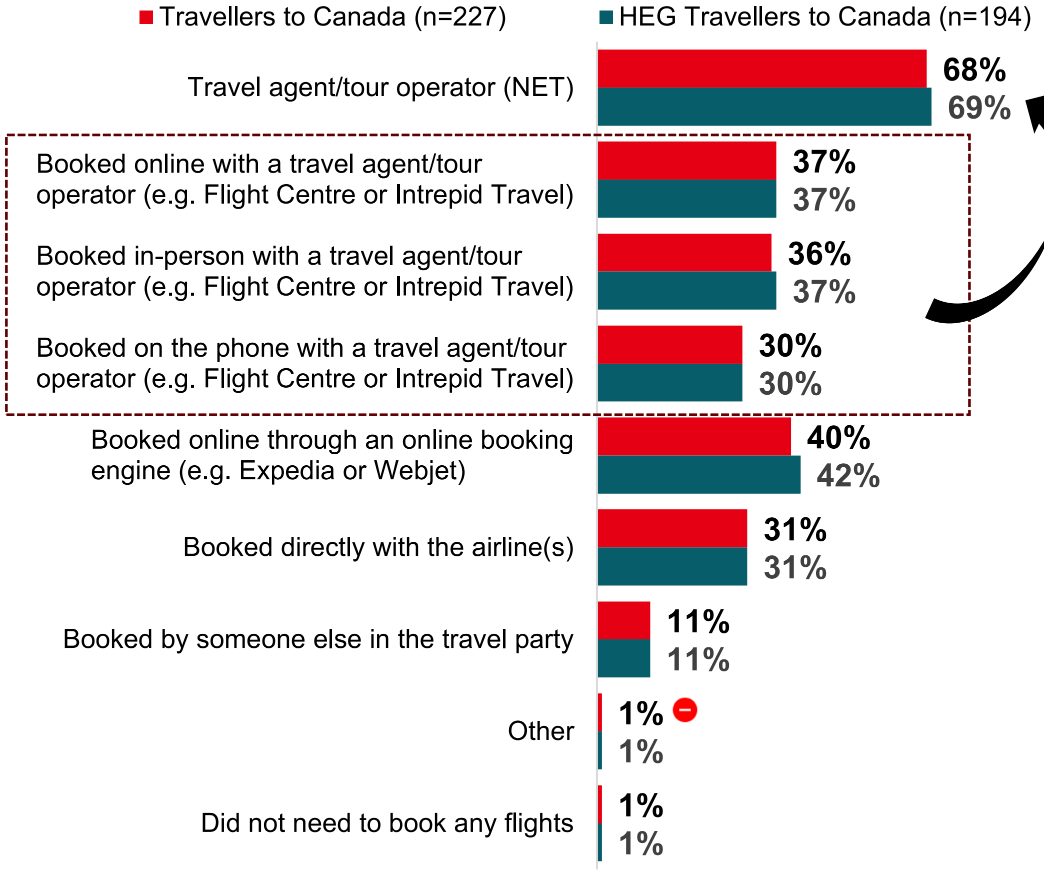
DESTINATION CANADA

Among the total audience, booking through online booking engines dropped vs. a year ago. Travel agents/tour operators continue to be the top source for booking flights among both Total Travellers and HEGs.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



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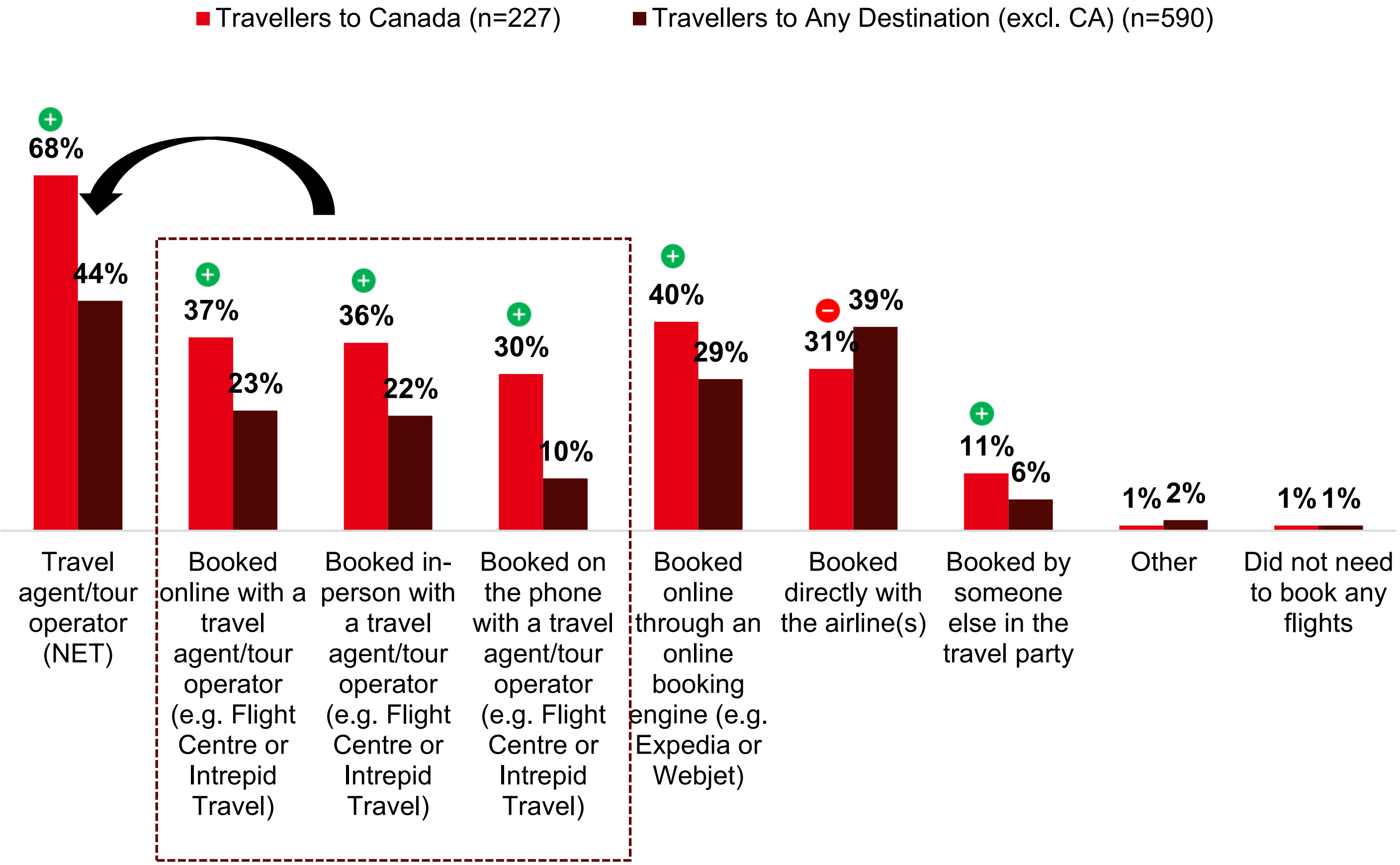
⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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

BOOKING FLIGHTS FOR RECENT TRIP: BY DESTINATION

A higher proportion of Australians traveling to Canada booked flights through travel agents compared to other destinations, with notable preference for online and in-person bookings through these services.



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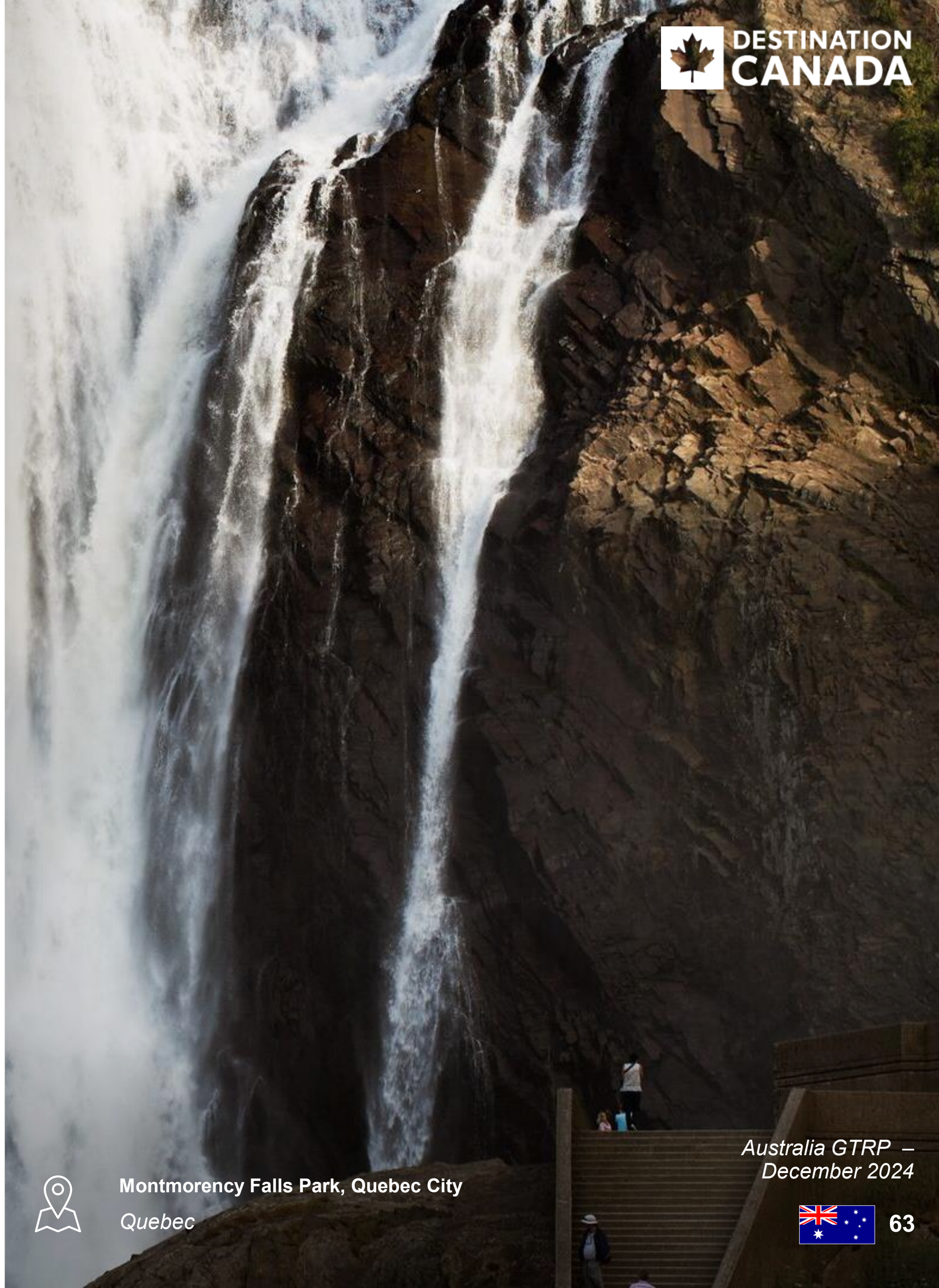
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years

F12. How did you book your flight for this trip? (Select all that apply)



DESTINATION CANADA

Montmorency Falls Park, Quebec City

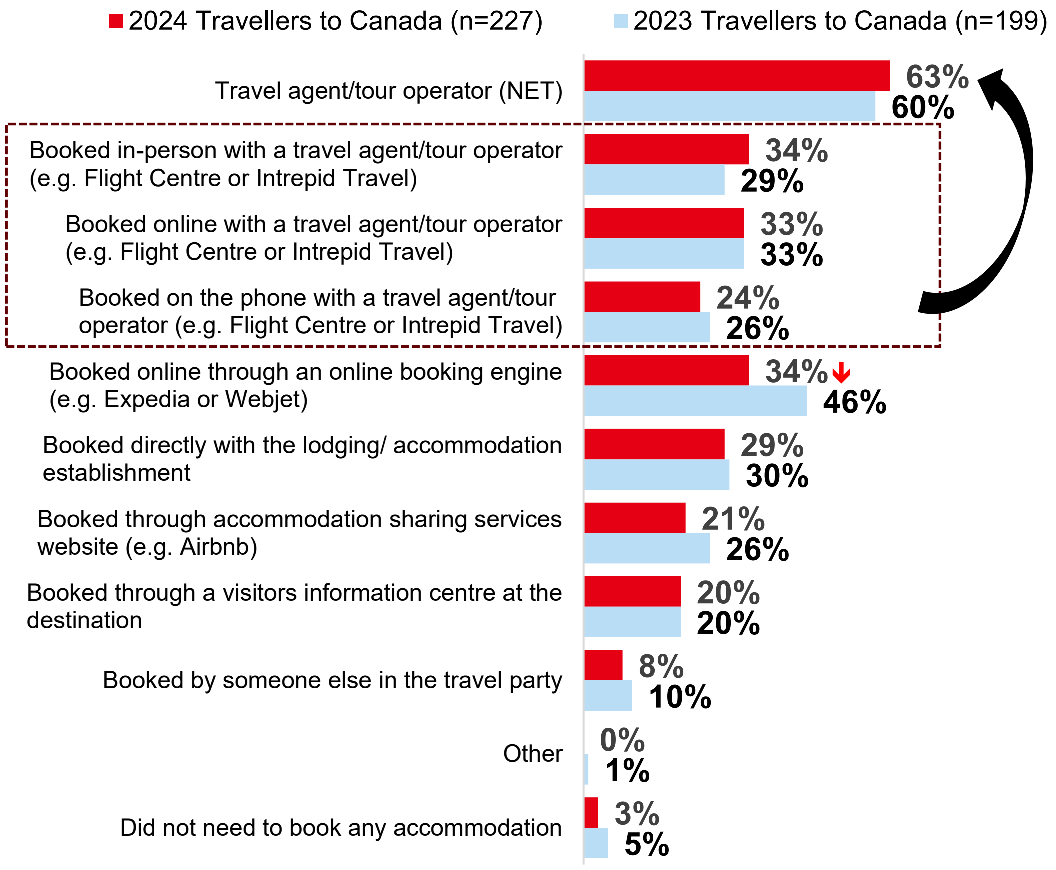
Quebec

BOOKING ACCOMMODATIONS FOR RECENT TRIP

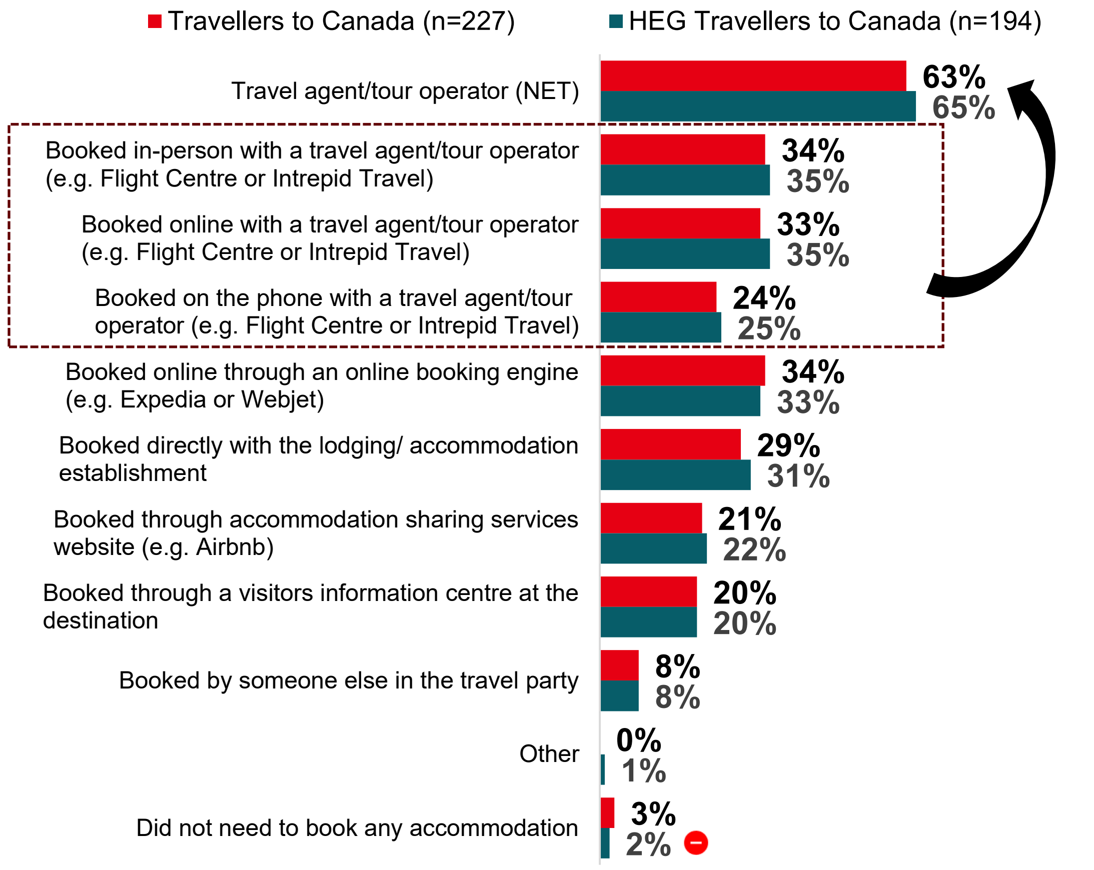
DESTINATION CANADA

Like flights, utilizing booking engines for accommodations is down vs. a year ago. Travel agents/tour operators continue to be the top source for booking accommodations among both Total Travellers and HEGs.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



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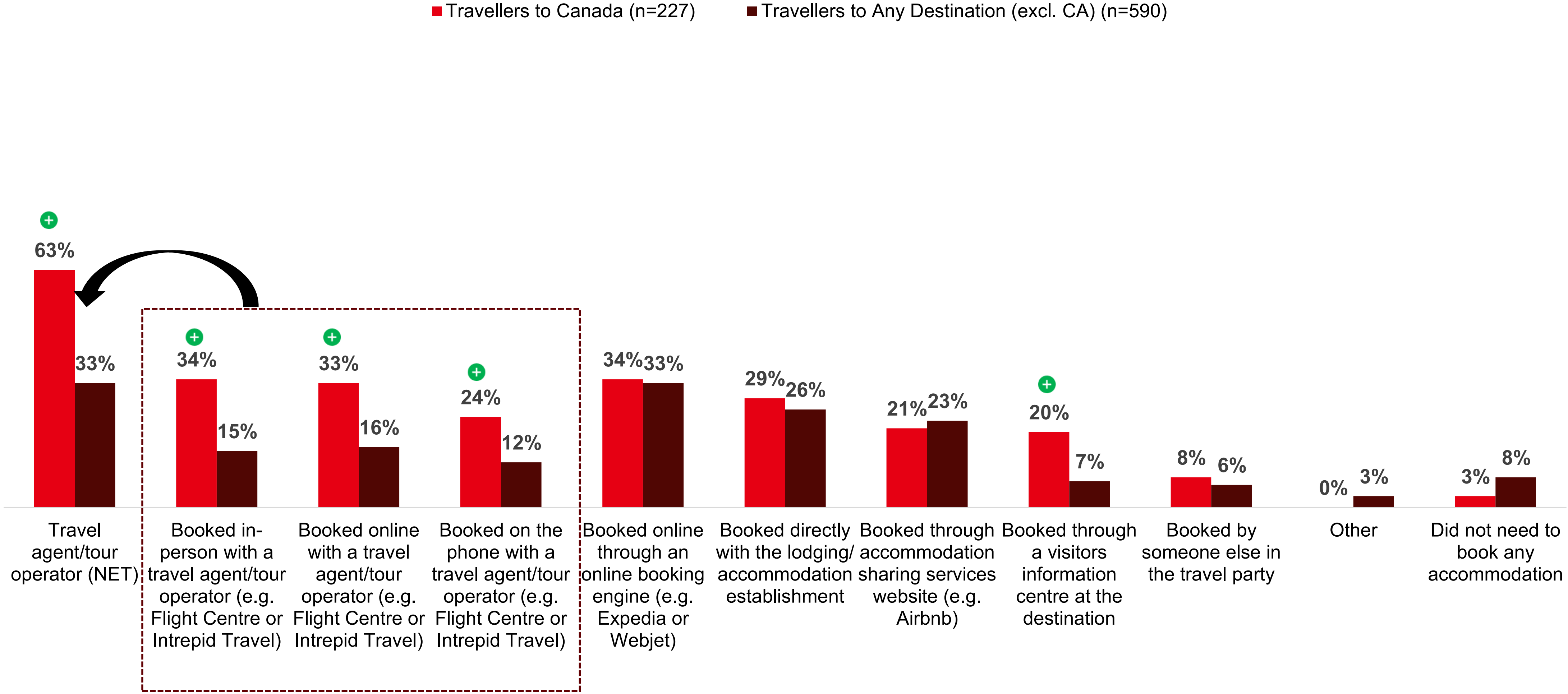
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

BOOKING ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

Almost two-thirds of Australian travellers to Canada use travel agents to book accommodations, favouring in-person or online channels—about double the usage compared to travellers visiting other destinations.



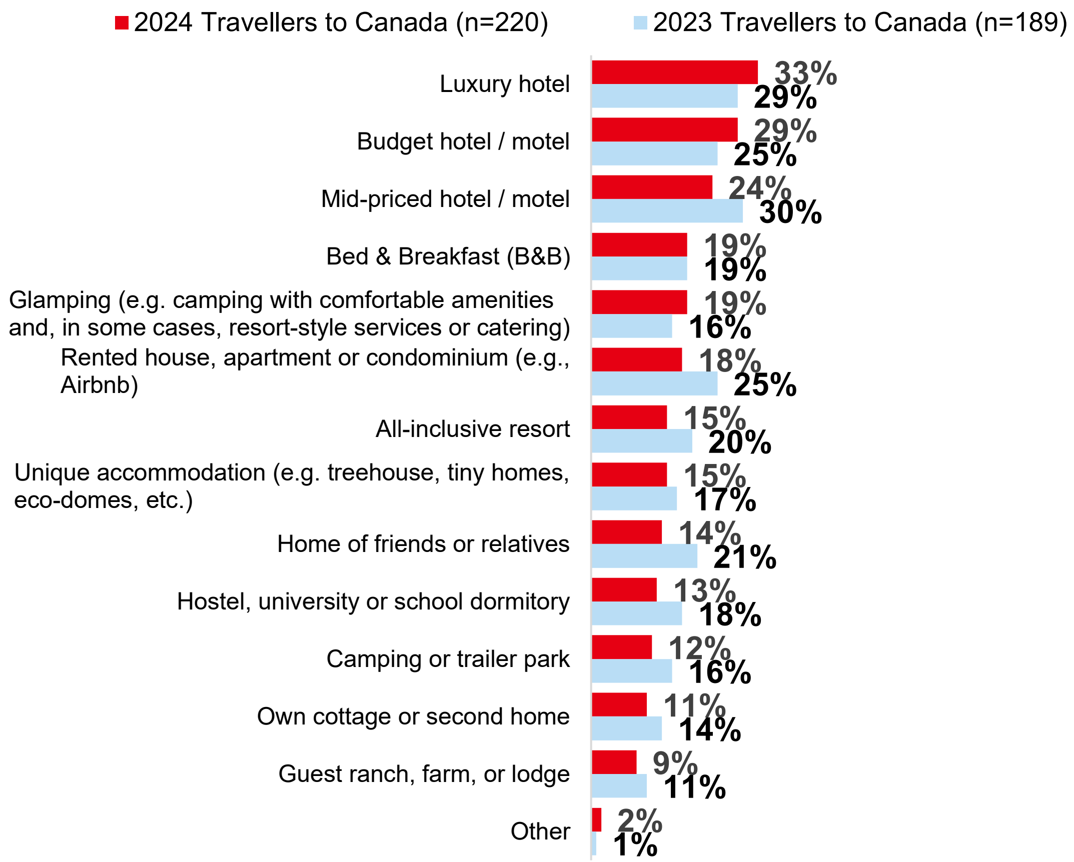
+ / – = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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

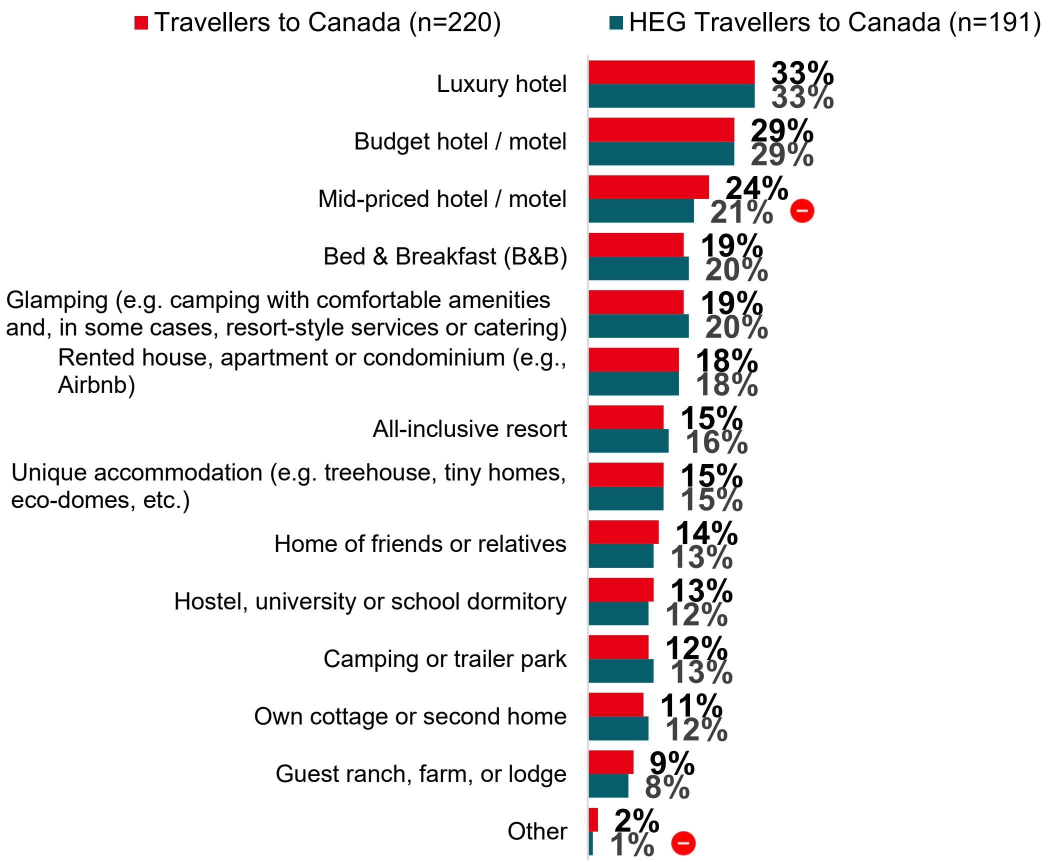
TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Among the HEG audience, accommodation preferences for travel to Canada are consistent with the overall traveller group, with luxury hotels and budget hotels or motels being the most popular choices.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



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

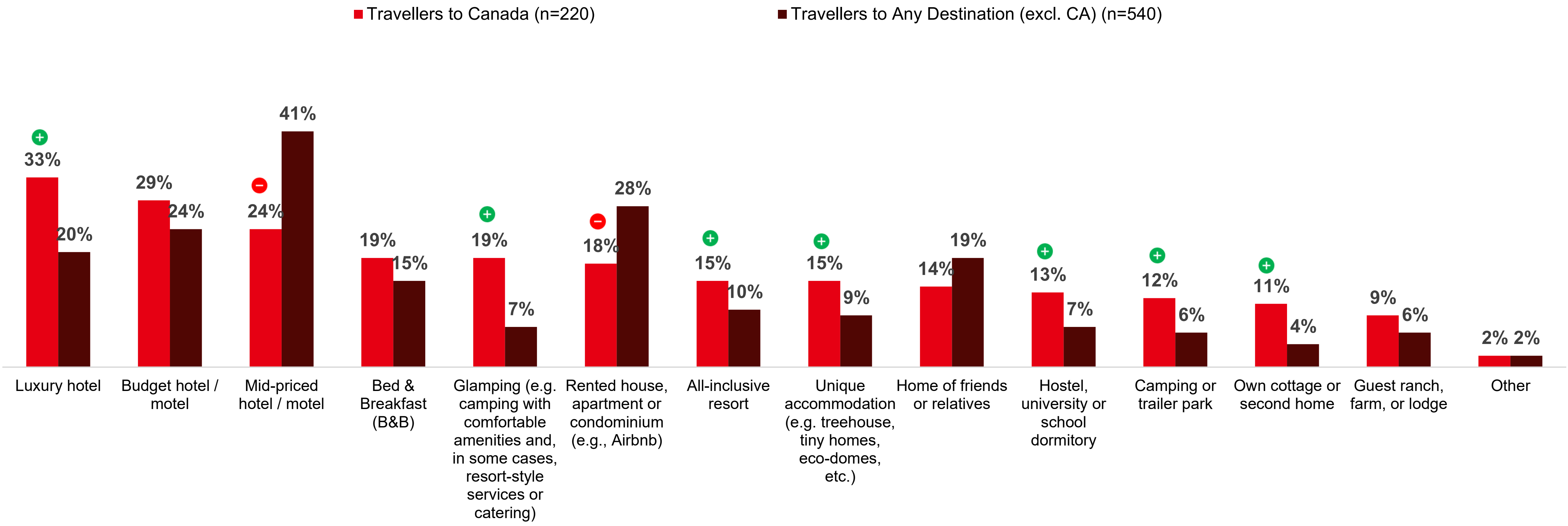
⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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

TYPE OF ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

DESTINATION CANADA

One-third of Australian travellers to Canada booked luxury hotels for their trip, compared to just 20% for other destinations (where mid-price hotels were more common). Of note are several other accommodation types used more so for Canada trips (including glamping and all-inclusive resorts)



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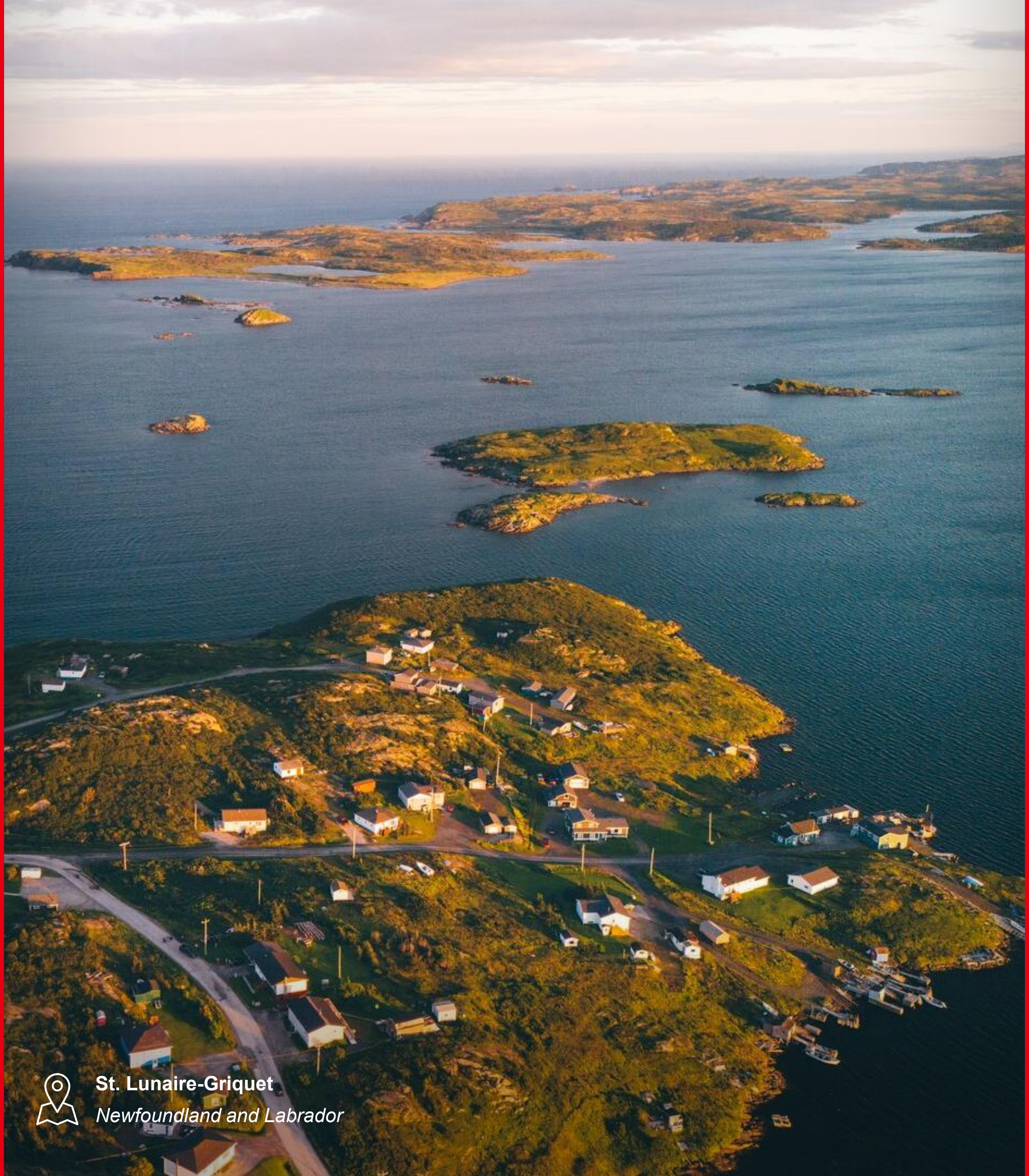
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Booked Accommodations
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



DESTINATION CANADA

RECENT TRIP TO CANADA

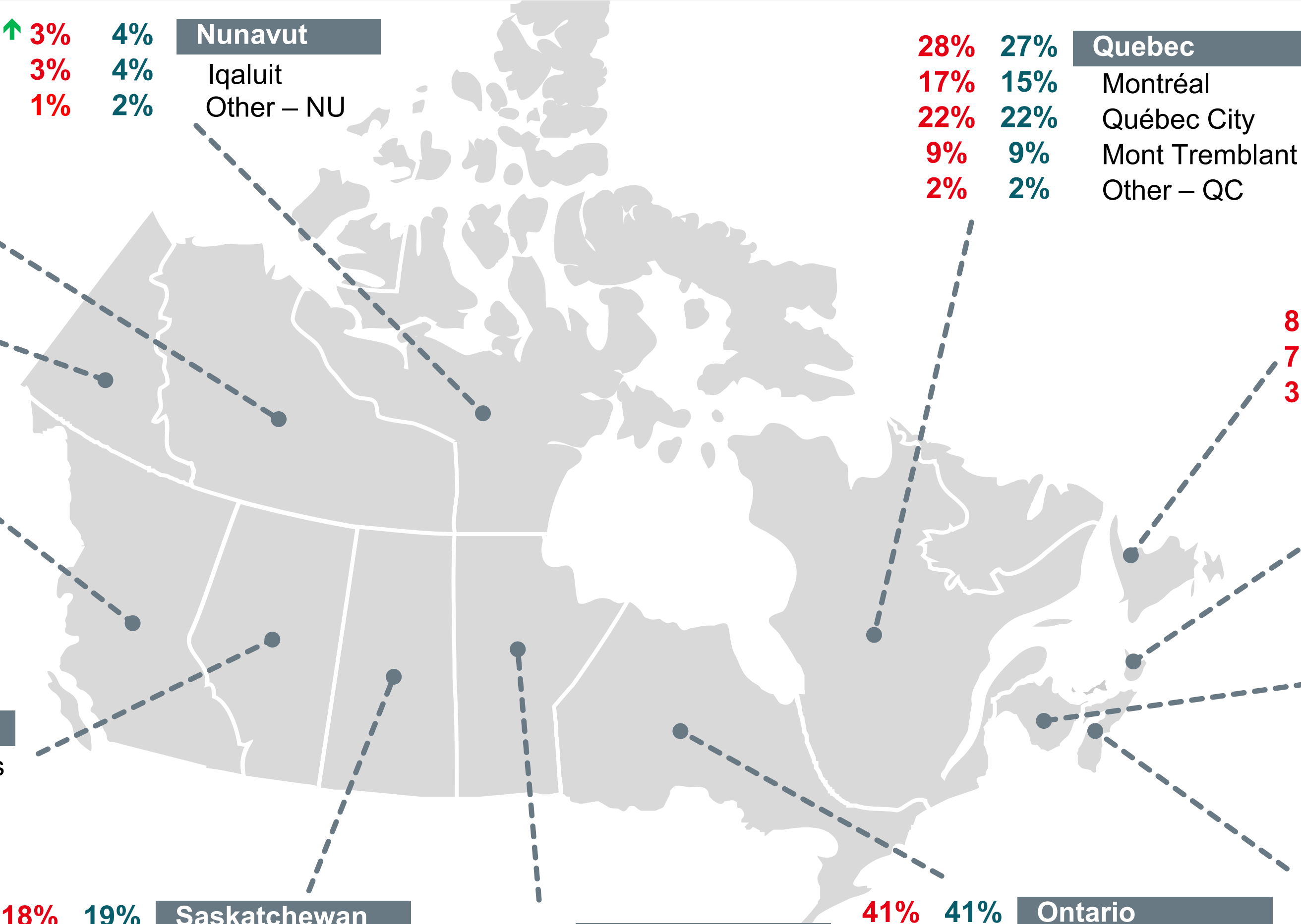
CANADIAN DESTINATIONS VISITED DURING RECENT TRIP

Australian travellers have explored various provinces in Canada with British Columbia and Ontario topping the list. Alberta ranks third and trips there increased year over year .

DESTINATION CANADA

Total Travellers

Total HEG Travellers



	Total Travellers	Total HEG Travellers
Northwest Territories	6%	6%
Yellowknife	5%	5%
Inuvik	3%	4%
Other – NWT	2%	2%

	Total Travellers	Total HEG Travellers
Nunavut	↑ 3%	4%
Iqaluit	3%	4%
Other – NU	1%	2%

	Total Travellers	Total HEG Travellers
Quebec	28%	27%
Montréal	17%	15%
Québec City	22%	22%
Mont Tremblant	9%	9%
Other – QC	2%	2%

	Total Travellers	Total HEG Travellers
Yukon	7%	7%
Whitehorse	4%	4%
Dawson City	6%	6%
Other – YT	-%	1%

	Total Travellers	Total HEG Travellers
Newfoundland & Labrador	8%	8%
St. John’s	7%	6%
Other - NL	3%	4%

	Total Travellers	Total HEG Travellers
British Columbia	41%	41%
Rocky Mountains	17%	16%
Vancouver	28%	27%
Victoria	25%	25%
Whistler	14%	14%
Okanagan	8%	7%
Other – BC	2%	3%

	Total Travellers	Total HEG Travellers
Prince Edward Island	11%	11%
Charlottetown	10%	9%
Other - PEI	3%	4%

	Total Travellers	Total HEG Travellers
New Brunswick	10%	9%
Fredericton	8%	7%
Saint John	6%	6%
Other - NB	2%	2%

	Total Travellers	Total HEG Travellers
Alberta	↑ 37%	35%
Rocky Mountains	24%	23%
Calgary	20%	18%
Edmonton	10%	9%
Banff	15%	14%
Jasper	12%	10%
Other – AB	4%	3%

	Total Travellers	Total HEG Travellers
Saskatchewan	18%	19%
Regina	11%	11%
Saskatoon	13%	14%
Other – SK	4%	4%

	Total Travellers	Total HEG Travellers
Manitoba	19%	16% (−)
Winnipeg	14%	12%
Churchill	11%	10% (−)
Other – MB	2%	2%

	Total Travellers	Total HEG Travellers
Ontario	41%	41%
Ottawa	22%	24%
Niagara Falls	18%	17%
Toronto	35%	34%
Muskoka	7%	7%
Other – ON	3%	3%

	Total Travellers	Total HEG Travellers
Nova Scotia	13%	13%
Halifax	12%	12%
Cape Breton	8%	9%
Other - NS	1%	2%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=227); HEG (n=194)
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023) (+) / (−) = significantly higher/lower result (HEG vs. 2024 Total)

CANADIAN DESTINATIONS VISITED DURING RECENT TRIP: BY KEY CANADIAN CITIES VISITED

DESTINATION CANADA

Australian travellers that recently travelled to Canada visited were most likely to also visit BC, Alberta, Ontario or Quebec on the same trip.

	Canadian Cities Visited on Most Recent Trip				
	Vancouver *(n=114)*	**Calgary** *(n=68)*	**Toronto** *(n=143)*	**Montreal** *(n=70)*	**Halifax** *(n=54)*
British Columbia	*100%*	46%	40%	47%	57%
Alberta	35%	*100%*	30%	32%	46%
Saskatchewan	23%	18%	17%	27%	41%
Manitoba	20%	30%	16%	20%	32%
Ontario	31%	48%	*100%*	57%	68%
Quebec	30%	33%	39%	*100%*	43%
New Brunswick	14%	27%	12%	19%	24%
Nova Scotia	20%	26%	22%	21%	*100%*
Prince Edward Island	12%	24%	15%	23%	24%
Newfoundland & Labrador	10%	19%	9%	16%	24%
Yukon	10%	19%	7%	9%	22%
Northwest Territories	11%	13%	8%	10%	19%
Nunavut	4%	9%	4%	7%	13%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)

TOP 10 ACTIVITIES PARTICIPATED IN DURING RECENT TRIP TO CANADA: BY SEGMENT

DESTINATION CANADA

All segments engaged in a nature-related activity during their trip to Canada, with Culture Seekers also favouring road cycling.

Outdoor Explorers
(n=53)

Culture Seekers
(n=66)

Refined Globetrotters
(n=43*)

Purpose Driven Families
(n=32*)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)
*Small base size, interpret with caution (n<50)

THANK YOU

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