2024 GLOBAL TRAVELLER RESEARCH PROGRAM

CHINA HIGHLIGHTS REPORT

Three Isle Lake   *Alberta*

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA collective

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STUDY OVERVIEW: CHINA MARKET

The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in Chinese, 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 **December 3rd – 16th 2024**	**Geographical Definition for Qualified Trips** **Outside of: East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)**	**Sample Distribution**

Sample Distribution	
Sample distribution:	**11 target cities***
Highly Engaged Guest (HEG) Audience:	1701
Other travellers:	528
Total sample size:	2229

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

* 11 target cities = Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao, Nanjing

Newfoundland and Labrador

Key Insights

Canada continues to be a leading international destination among Chinese travellers, with next 2-year immediate potential for Canada being 18.8M

Potential visitors to Canada are more likely to consider a visit during the Summer and Fall months

Travellers are interested in nature walks, natural attractions, oceanside beaches, and local cuisine

Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors such as safety, and the availability of outdoor experiences they were interested in

There is a high level of interest in Indigenous culture among Chinese travellers; safety and comfort of the destination, and culturally significant experiences would increase their interest in Indigenous cultural experiences

MARKET SIZING

MARKET SIZING — LONG-HAUL TRAVELLERS

DESTINATION CANADA

Total Population within 11 Target Cities* 18+

105,639,500 (Total CN Population within 11 target cities* 18+)

13% Took a Long-Haul^ Pleasure Trip in the Past 3 Years

13,733,000 (Recent Long-Haul Travellers)

17% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

17,958,500 (Upcoming Long-Haul Travellers)

27.0% Incidence Rate

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

28,522,500 (Total Long-haul Travellers)

* 11 target cities = Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao, Nanjing
^ Long-haul = outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)
Note: Results are from a random telephone omnibus survey undertaken in 2014.
Base: General population aged 18 plus in 11 cities (n=4475)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

Total potential **Long-Haul Pleasure** travellers aged 18 years or more

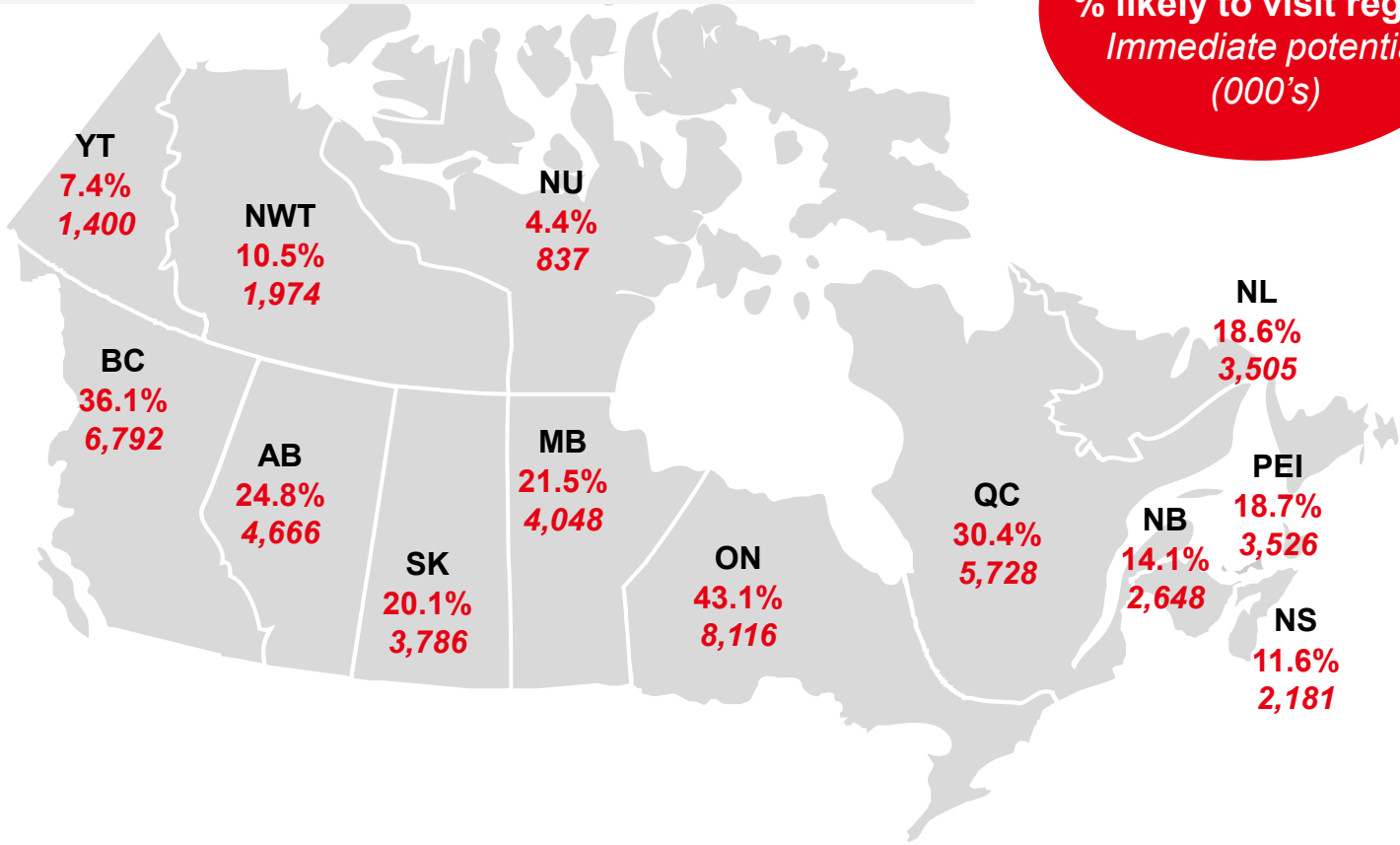| 28,522,500 |
|:---:|

x

Target Market for Canada
(Those in the dream to purchase stages of the path to purchase for Canada)

77.9%

=

Size of the Target Market

22,213,500

x

Immediate Potential for Canada
(Will definitely/very likely visit Canada in the next 2 years[1])

84.8% ↓

=

Immediate Potential

18,835,000
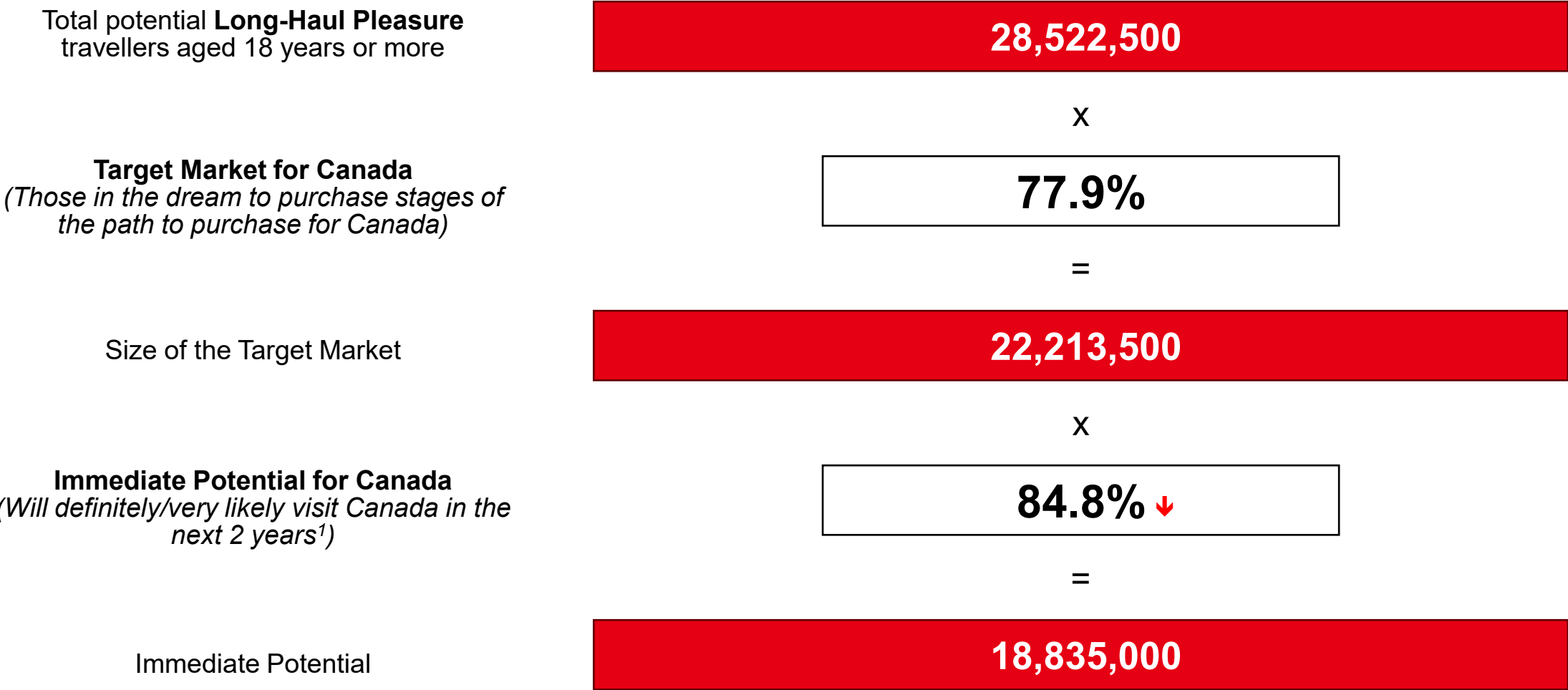
[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=2229); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1736)
C1. 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 BY REGION

Ontario has the potential to draw in over 8 million Chinese travellers over the next 2 years.

Nunavut

Immediate Potential for Canada: **18,835,000**

Key:

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

YT
7.4%
1,400

NWT
10.5%
1,974

NU
4.4%
837

BC
36.1%
6,792

AB
24.8%
4,666

SK
20.1%
3,786

MB
21.5%
4,048

ON
43.1%
8,116

QC
30.4%
5,728

NL
18.6%
3,505

PEI
18.7%
3,526

NB
14.1%
2,648

NS
11.6%
2,181

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=1736)
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	6%	12%	14%	16%
Alberta	4%	8%	12%	10%
Saskatchewan	2%	8%	9%	6%
Manitoba	3%	8%	10%	7%
Ontario	5%	13%	19%	18%
Quebec	5%	9%	13%	13%
New Brunswick	2%	6%	7%	5%
Nova Scotia	2%	5%	6%	4%
Prince Edward Island	2%	7%	7%	7%
Newfoundland & Labrador	3%	6%	8%	8%
Yukon	1%	3%	4%	4%
Northwest Territories	1%	5%	4%	4%
Nunavut	1%	2%	2%	2%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1736)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

Chinese travellers show a preference for travelling to Canada in the summer and fall months.

Whitehorse
Yukon
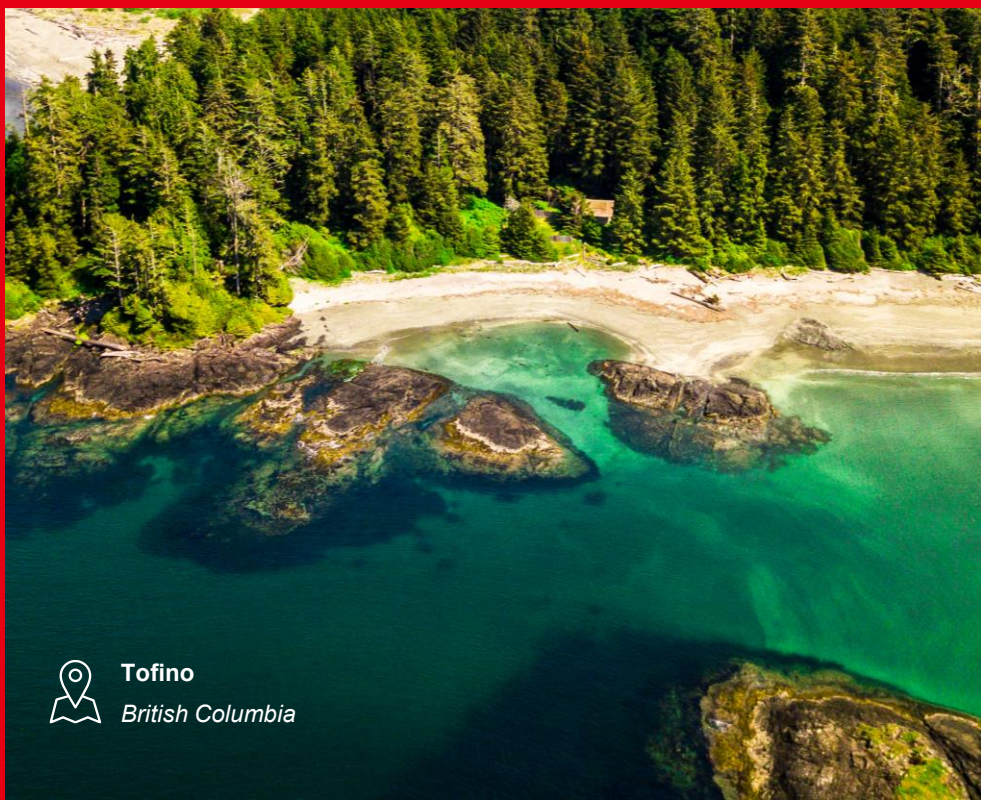
China GTRP – December 2024
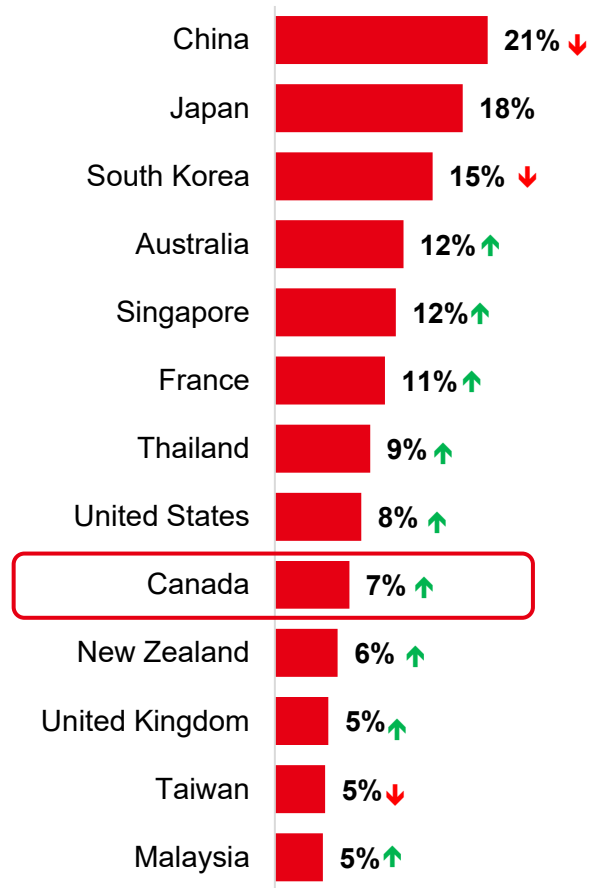
CANADA VS. COMPETITORS

Alberta

Tofino
British Columbia

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)[1]

On an unaided basis, Canada ranks relatively low for destination consideration among Chinese travellers.

Country	Value
China	21% ↓
Japan	18%
South Korea	15% ↓
Australia	12% ↑
Singapore	12% ↑
France	11% ↑
Thailand	9% ↑
United States	8% ↑
Canada	**7% ↑**
New Zealand	6% ↑
United Kingdom	5% ↑
Taiwan	5% ↓
Malaysia	5% ↑

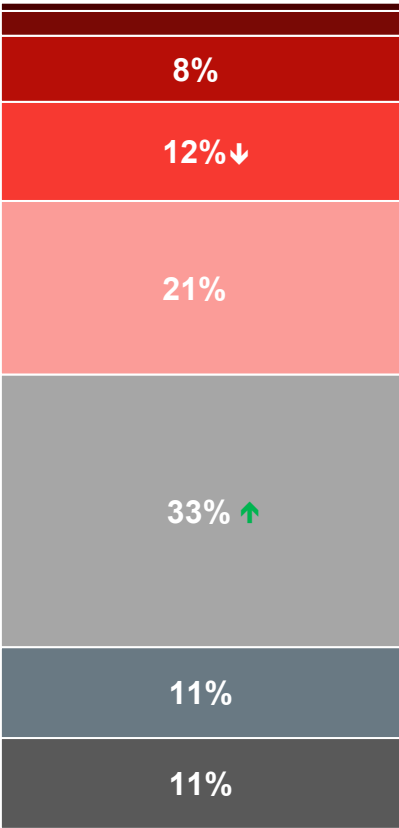↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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=2229)
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

■ Have already booked my transportation and accommodations

■ Am currently making transportation and accommodation arrangements

■ Am planning the itinerary for a trip to this country

■ Have started to gather some travel information for a trip to this country

■ Seriously considering visiting / returning in the next 2 years

■ Dreaming about visiting / returning someday

■ Not interested in visiting / returning in the foreseeable future

■ Have never thought of taking a trip to this destination

Chart (stacked bar):
- 8%
- 12% ↓
- 21%
- 33% ↑
- 11%
- 11%

Actively Planning trip to Canada ↓ 21%

Two in ten Chinese travellers are actively planning a trip to 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=2229)
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)

Lake Louise
Alberta

Canada GTRP – December 2024

INDIGENOUS TRAVEL

Carcross
Yukon

UNAIDED INDIGENOUS DESTINATION
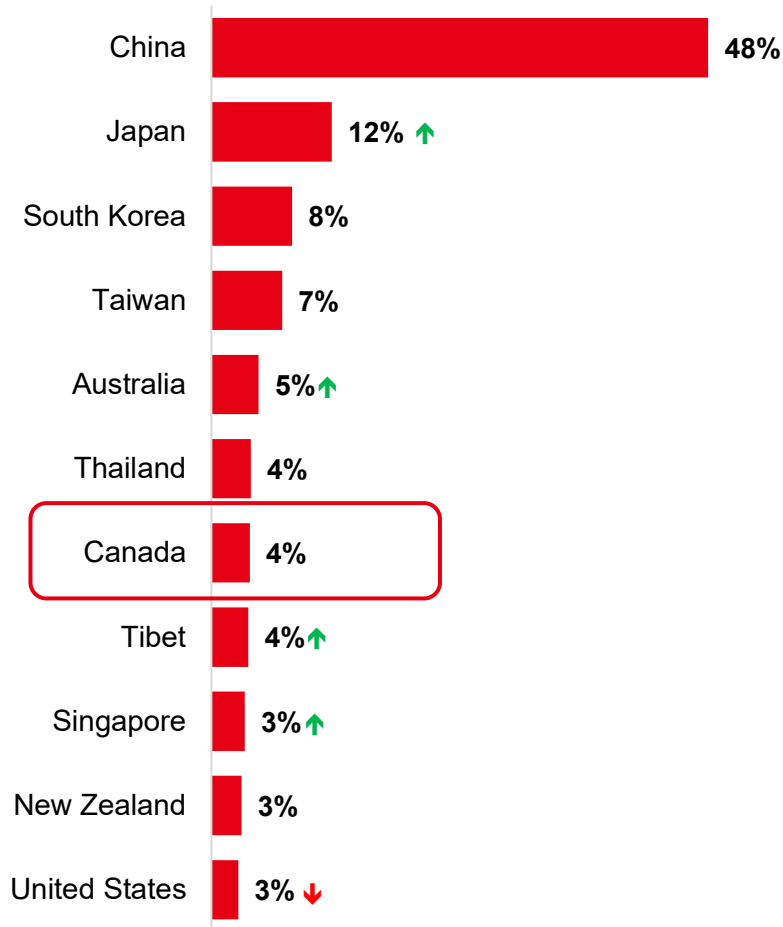
China   **48%**

Japan   **12%** ⬆

South Korea   **8%**

Taiwan   **7%**

Australia   **5%**⬆

Thailand   **4%**

Canada   **4%**

Tibet   **4%**⬆

Singapore   **3%**⬆

New Zealand   **3%**

United States   **3%**⬇

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

⬆ / ⬇ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229)
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 East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

Manitoulin Island
Ontario

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Kelowna
British Columbia

INTEREST IN INDIGENOUS DESTINATIONS

Seven in ten Chinese travellers are interested in participating in Indigenous experiences in Canada, with over three in ten being very interested.

- 5 - Very interested
- 4
- 3
- 2
- 1 - Not at all interested

32%
39%
21%
5%
3%
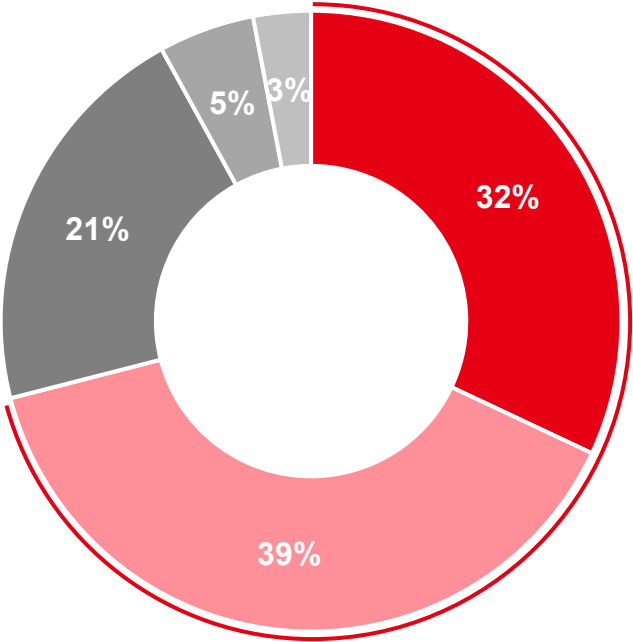
4 or 5 (out of 5)
71%

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=1095)
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

Safety and comfort of the destination, and cultural significance and uniqueness are the most mentioned factors driving interest in Indigenous cultural experiences.

Victoria
British Columbia

Factor	Percentage
Safety and comfort of the destination	49%
Cultural significance and uniqueness	40%
Accessibility and ease of travel	36%
Authenticity of the experiences	36%
Personal interest in Indigenous cultures	36%
Availability of information and marketing	20%
Availability of full-day experiences (6+ hours)	19%
Recommendations and reviews	17%
Availability of short experiences (1-3 hours)	15%
Smaller group size or intimate experiences	12%

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=1135)
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

Montreal
Quebec

PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS

Month	Percentage	Season	Percentage
December	9%	Winter	20%
January	6%		
February	10%		
March	11%	Spring	46%
April	15%		
May	31%		
June	20%	Summer	48%
July	22%		
August	25%		
September	22%	Fall	49%
October	33%		
November	10%		
Don't know	1%		

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply
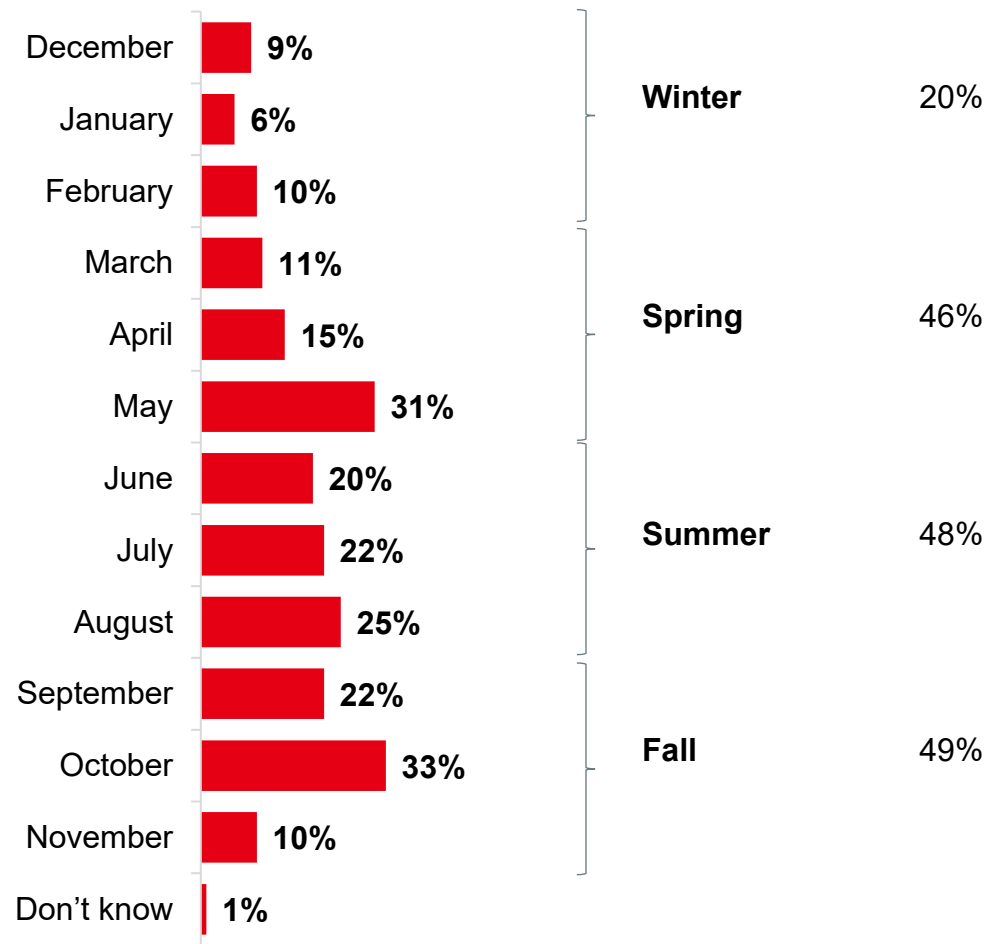
Fall and summer are the most preferred time of year for holiday trips, though May and October are the most popular months among Chinese travellers.
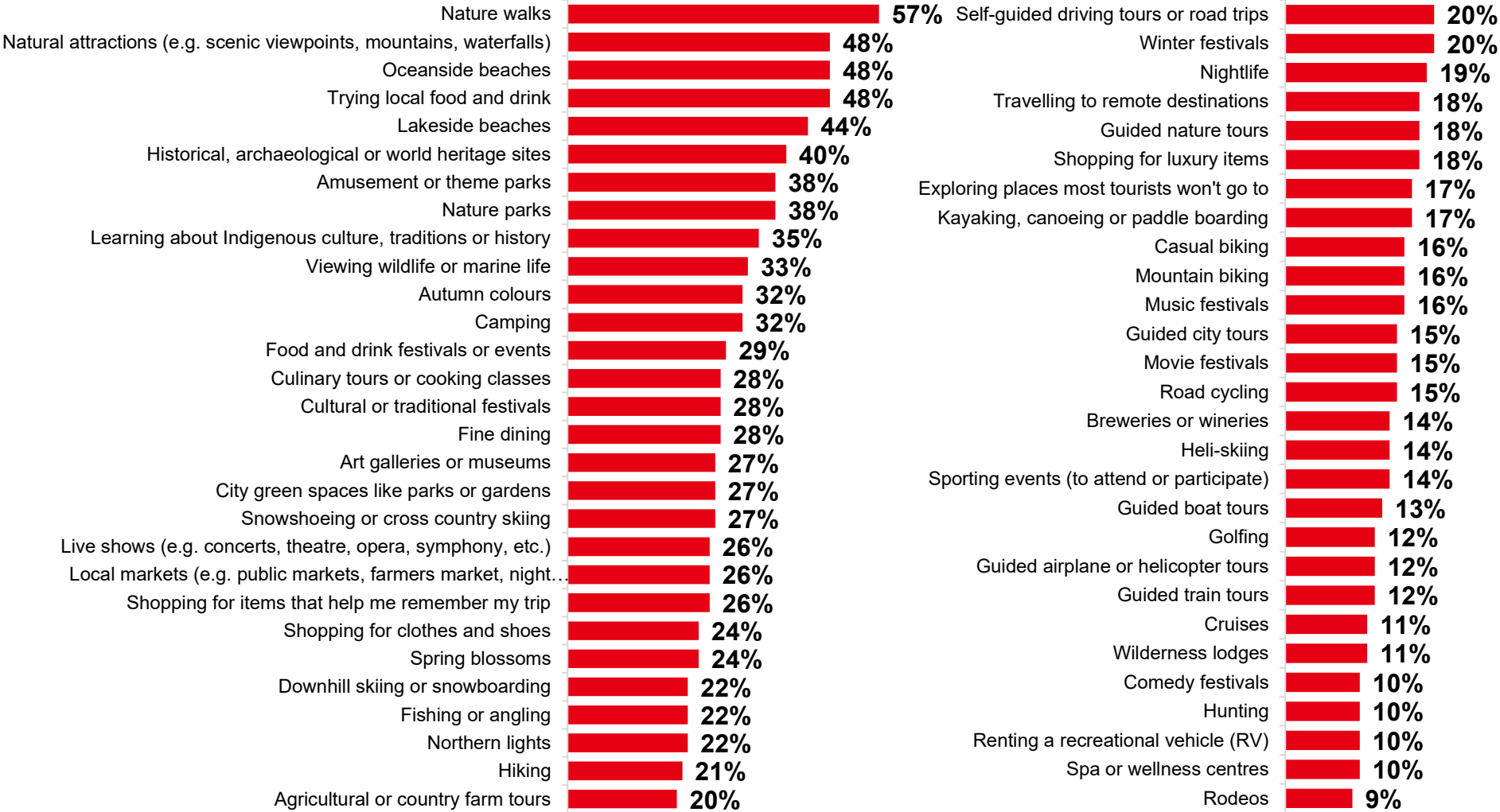
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Gros Morne National Park
Newfoundland and Labrador

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GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

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

Cup and Saucer Trail
Ontario

Activity	%
Nature walks	57%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	48%
Oceanside beaches	48%
Trying local food and drink	48%
Lakeside beaches	44%
Historical, archaeological or world heritage sites	40%
Amusement or theme parks	38%
Nature parks	38%
Learning about Indigenous culture, traditions or history	35%
Viewing wildlife or marine life	33%
Autumn colours	32%
Camping	32%
Food and drink festivals or events	29%
Culinary tours or cooking classes	28%
Cultural or traditional festivals	28%
Fine dining	28%
Art galleries or museums	27%
City green spaces like parks or gardens	27%
Snowshoeing or cross country skiing	27%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	26%
Local markets (e.g. public markets, farmers market, night…	26%
Shopping for items that help me remember my trip	26%
Shopping for clothes and shoes	24%
Spring blossoms	24%
Downhill skiing or snowboarding	22%
Fishing or angling	22%
Northern lights	22%
Hiking	21%
Agricultural or country farm tours	20%

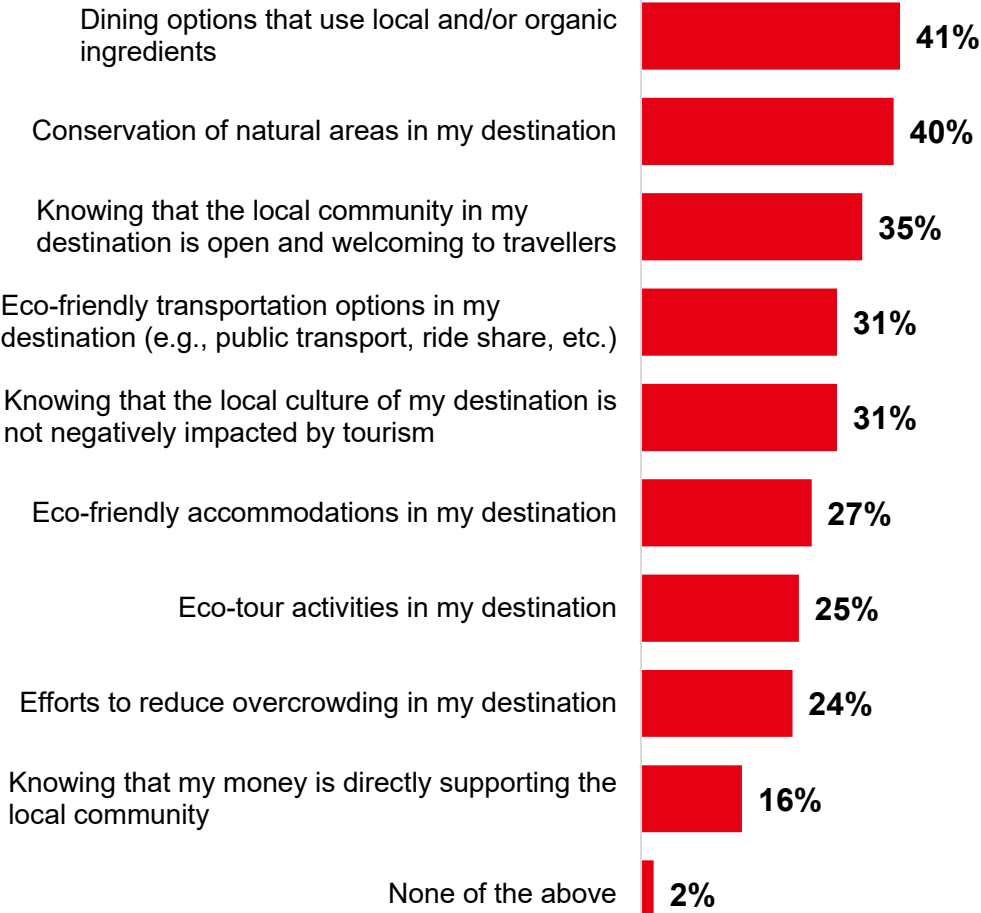| Activity	%
Self-guided driving tours or road trips	20%
Winter festivals	20%
Nightlife	19%
Travelling to remote destinations	18%
Guided nature tours	18%
Shopping for luxury items	18%
Exploring places most tourists won't go to	17%
Kayaking, canoeing or paddle boarding	17%
Casual biking	16%
Mountain biking	16%
Music festivals	16%
Guided city tours	15%
Movie festivals	15%
Road cycling	15%
Breweries or wineries	14%
Heli-skiing	14%
Sporting events (to attend or participate)	14%
Guided boat tours	13%
Golfing	12%
Guided airplane or helicopter tours	12%
Guided train tours	12%
Cruises	11%
Wilderness lodges	11%
Comedy festivals	10%
Hunting	10%
Renting a recreational vehicle (RV)	10%
Spa or wellness centres	10%
Rodeos	9%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229)
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 dining options that use local or organic ingredients, conservation of natural areas in my destination, and knowing that the local community is open and welcoming to travellers.
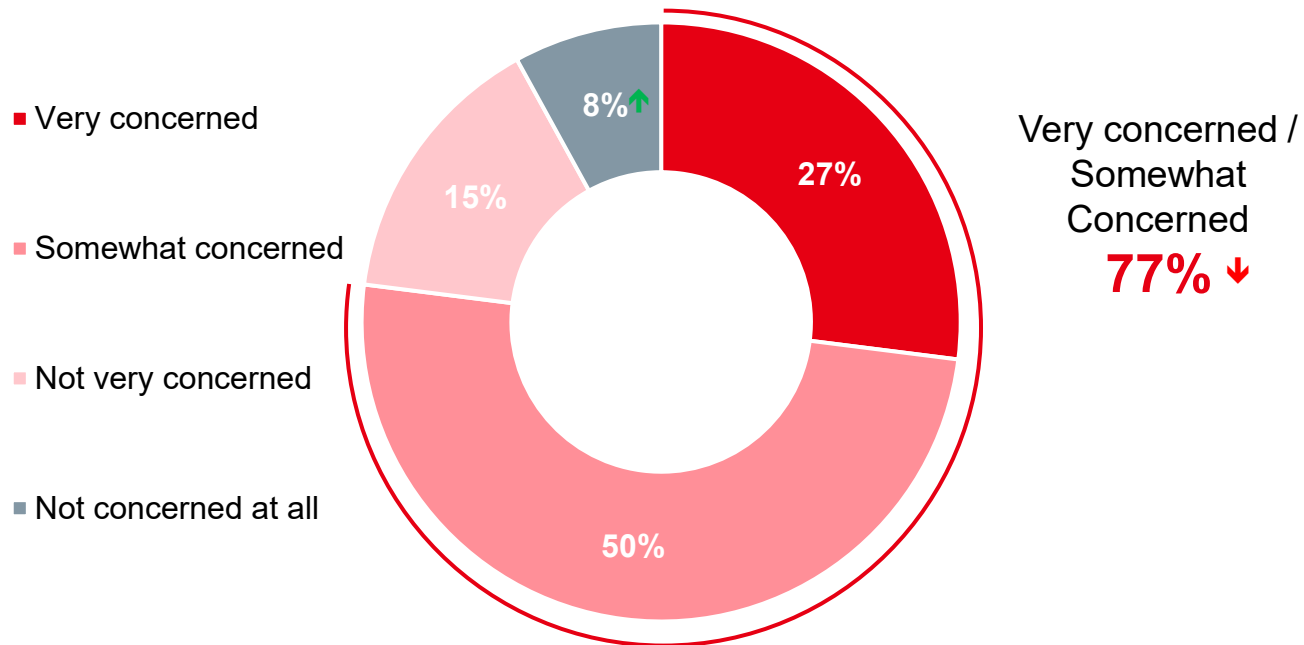
Dining options that use local and/or organic ingredients	41%
Conservation of natural areas in my destination	40%
Knowing that the local community in my destination is open and welcoming to travellers	35%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	31%
Knowing that the local culture of my destination is not negatively impacted by tourism	31%
Eco-friendly accommodations in my destination	27%
Eco-tour activities in my destination	25%
Efforts to reduce overcrowding in my destination	24%
Knowing that my money is directly supporting the local community	16%
None of the above	2%

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".

Niagara Falls
Ontario

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=1116)
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

- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not concerned at all

27%

50%

15%

8% ↑

Very concerned / Somewhat Concerned
77% ↓

72% 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=2229)
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?

DESTINATION CANADA

Almost eight in ten Chinese travellers are concerned about extreme weather impacting their travel plans, with over seven in ten stating that extreme weather will impact their future travel decisions.

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Canadian Museum of Human Rights, Winnipeg
Manitoba

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MOST RECENT TRIP

MAIN PURPOSE OF RECENT TRIP
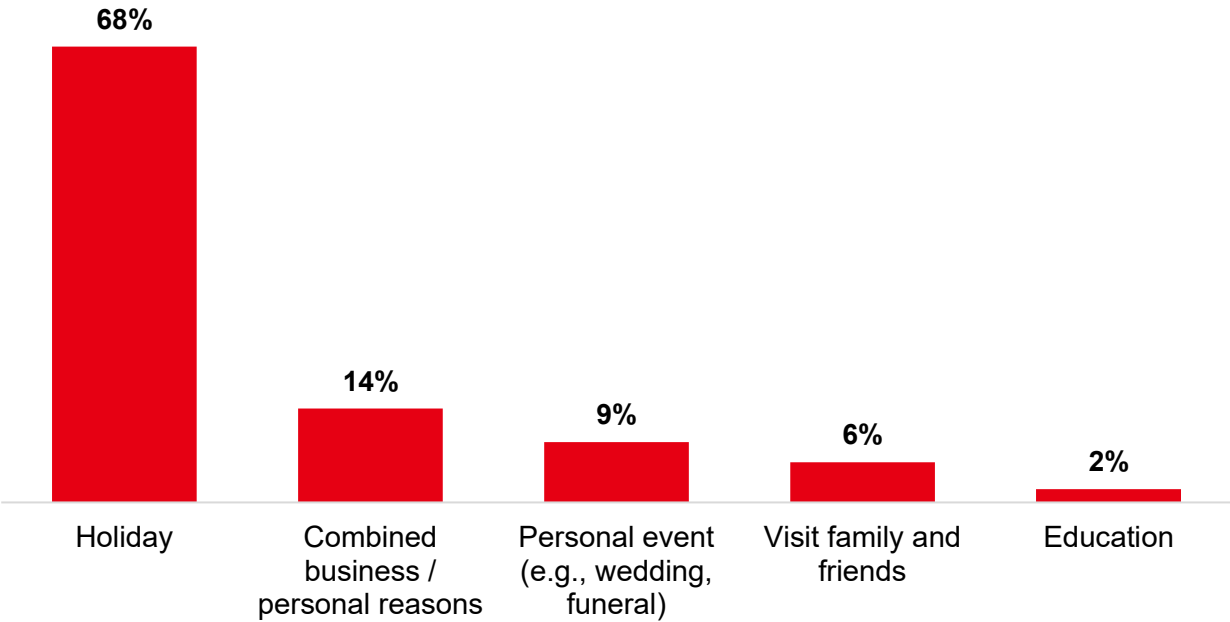
Holiday: 68%
Combined business / personal reasons: 14%
Personal event (e.g., wedding, funeral): 9%
Visit family and friends: 6%
Education: 2%

Nearly seven in ten Chinese travellers to Canada in the past three years were going on a holiday trip.

China GTRP – December 2024

Nahanni National Park Reserves
Northwest Territories

FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)
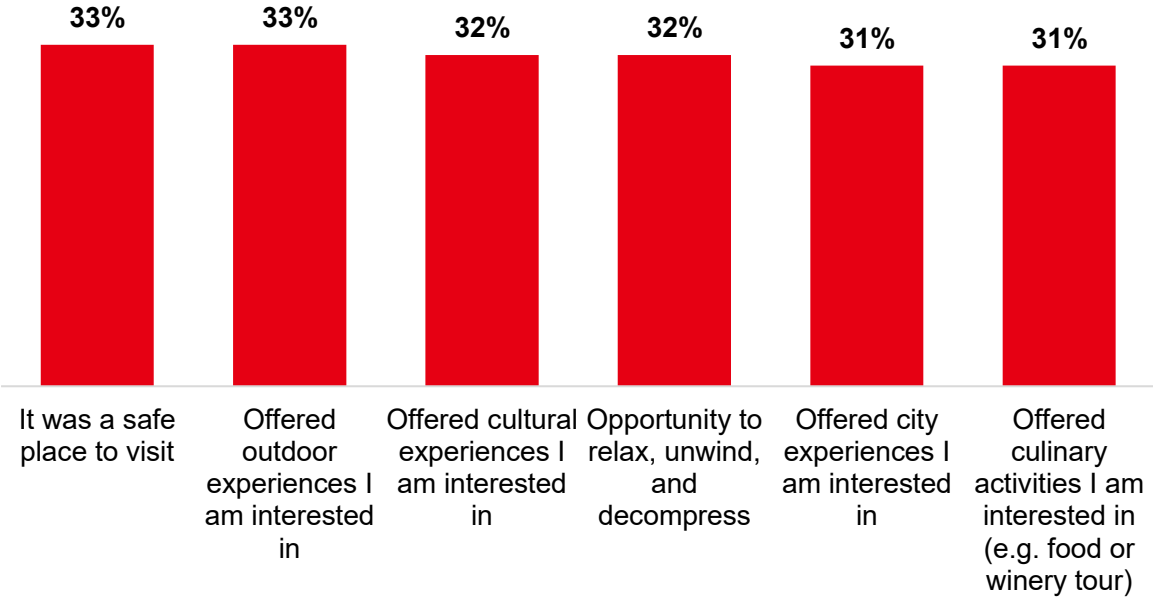
Bar chart:

- It was a safe place to visit: 33%
- Offered outdoor experiences I am interested in: 33%
- Offered cultural experiences I am interested in: 32%
- Opportunity to relax, unwind, and decompress: 32%
- Offered city experiences I am interested in: 31%
- Offered culinary activities I am interested in (e.g. food or winery tour): 31%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=272)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

The top factors for choosing to visit Canada for their most recent trip were safety, and the availability of outdoor experiences they were interested in.
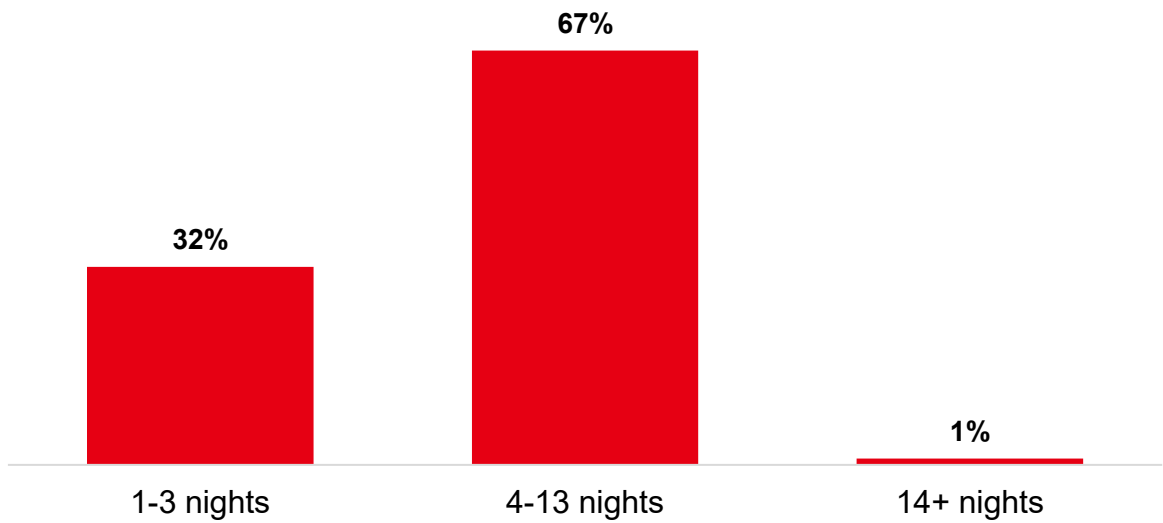
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Fundy Trail Provincial Park
New Brunswick

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NIGHTS SPENT DURING RECENT TRIP

32%

67%

1%

1-3 nights

4-13 nights

14+ nights

DESTINATION CANADA

Almost seven in ten Chinese travellers to Canada stayed for 4-13 nights.

China GTRP – December 2024

Barren Canyon, Algonquin Park
Ontario

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PAYMENT METHODS FOR RECENT TRIP
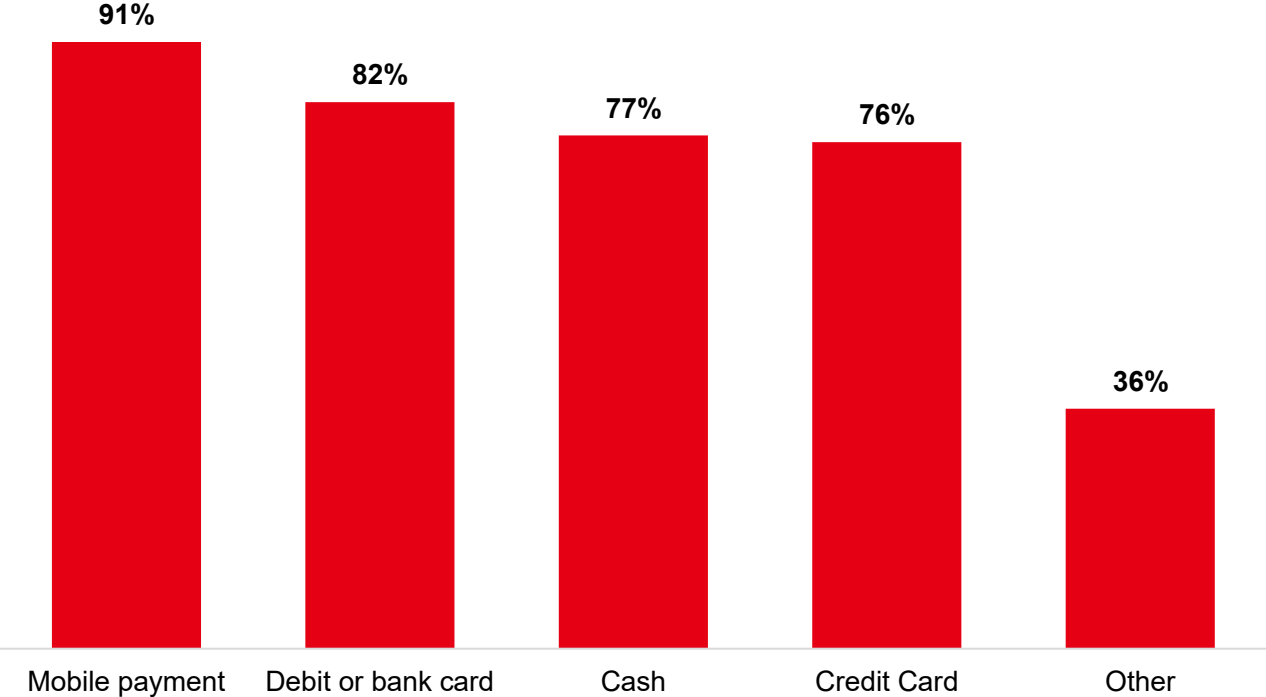
Mobile payment: 91%
Debit or bank card: 82%
Cash: 77%
Credit Card: 76%
Other: 36%
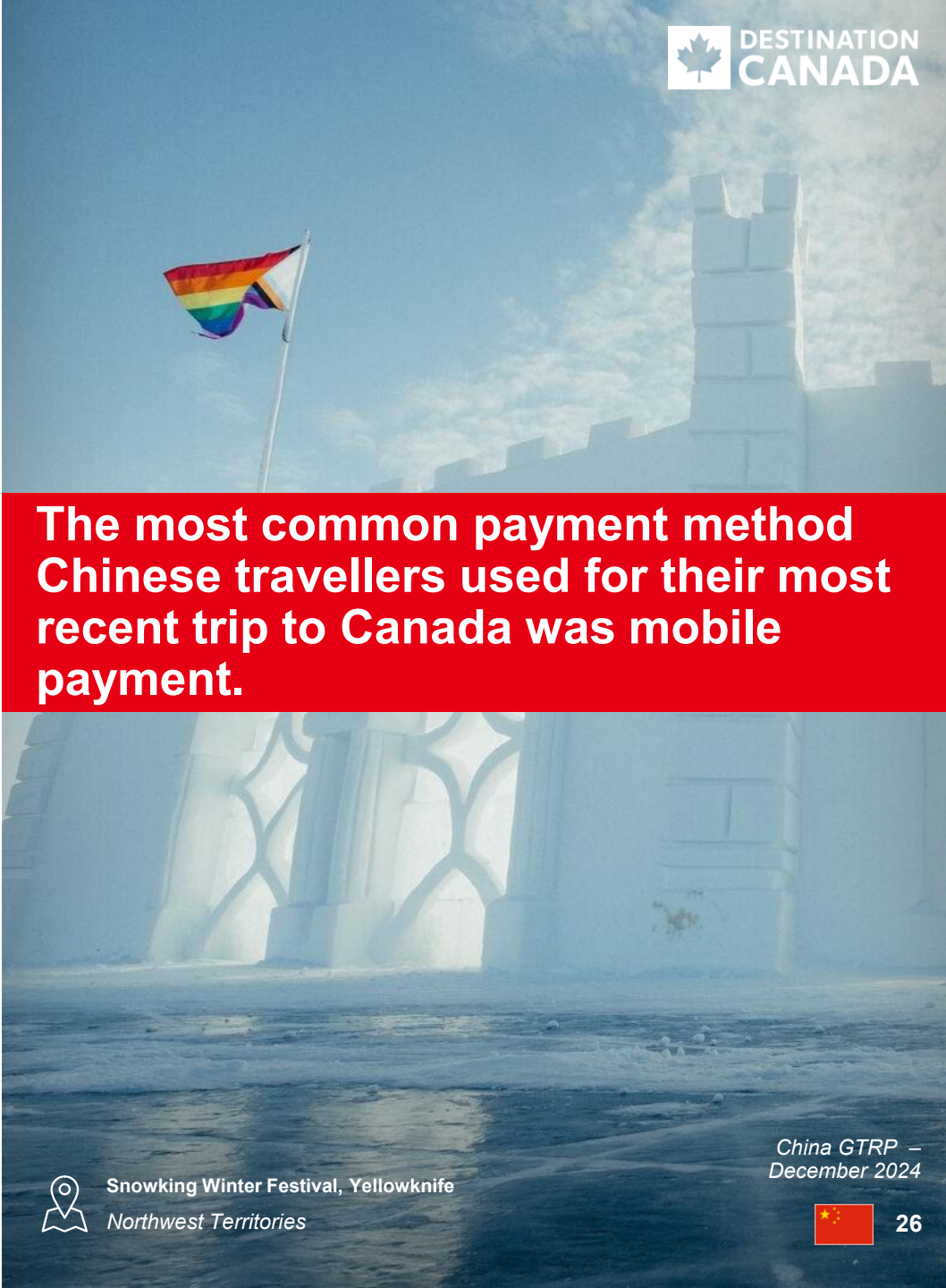
The most common payment method Chinese travellers used for their most recent trip to Canada was mobile payment.

China GTRP – December 2024

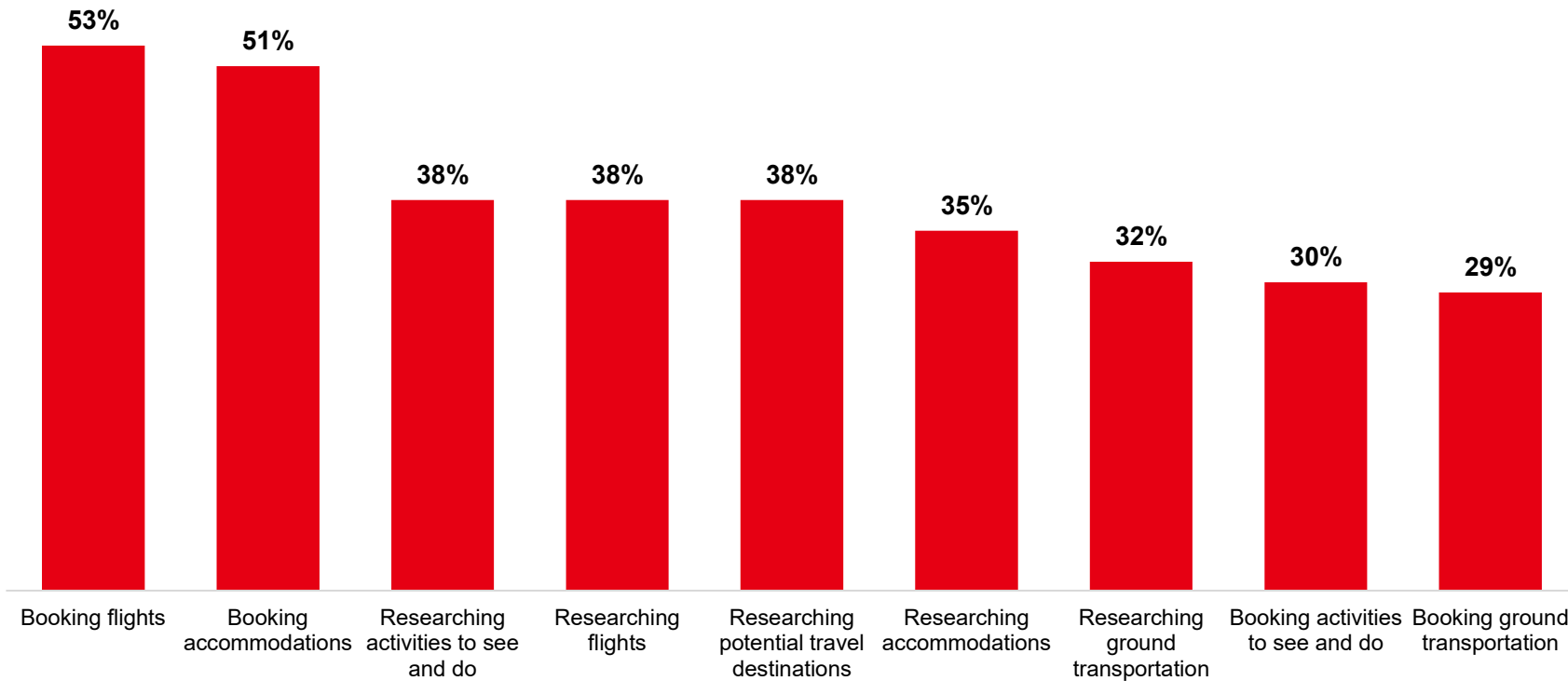**Snowking Winter Festival, Yellowknife**
Northwest Territories

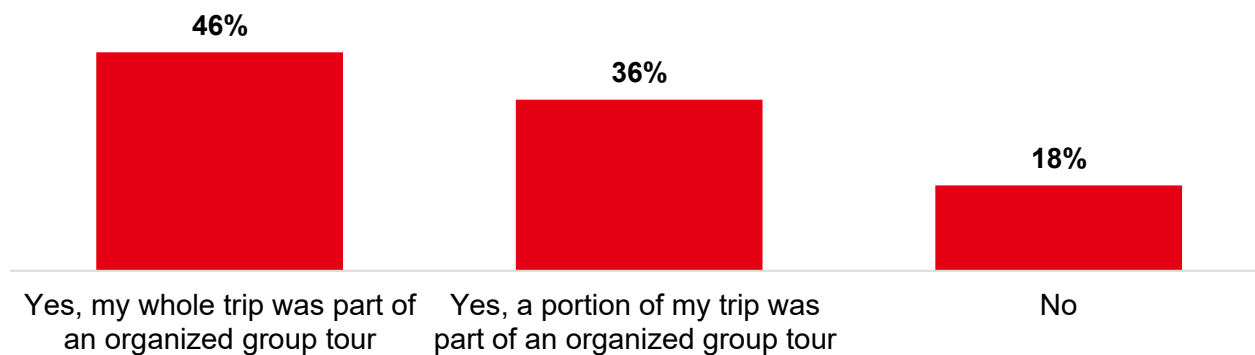# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

81% used a **travel agent**

Eight in ten recent travellers to Canada used a travel agent, most likely for booking flights or accommodations.

Category	Percentage
Booking flights	53%
Booking accommodations	51%
Researching activities to see and do	38%
Researching flights	38%
Researching potential travel destinations	38%
Researching accommodations	35%
Researching ground transportation	32%
Booking activities to see and do	30%
Booking ground transportation	29%

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Twin Falls Lodge
Saskatchewan

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ORGANIZED GROUP TOUR FOR RECENT TRIP

Over four in ten Chinese travellers used an organized group tour for their whole trip, and over three in ten used one for a portion of their trip.

46% — Yes, my whole trip was part of an organized group tour

36% — Yes, a portion of my trip was part of an organized group tour

18% — No

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=398)
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?

China GTRP – December 2024

Saskatoon
Saskatchewan

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BOOKING FLIGHTS FOR RECENT TRIP

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

Montmorency Falls Park, Quebec City
Quebec

Chart data:
- Travel agent/tour operator (NET): 69%
- Booked online with a travel agent/tour operator (e.g. CITS, CYTS, or Utour): 44%
- Booked on the phone with a travel agent/tour operator (e.g. CITS, CYTS, or Utour): 35%
- Booked in-person with a travel agent/tour operator (e.g. CITS, CYTS, or Utour): 31%
- Booked online through an online booking engine (e.g. Ctrip, Qunar, Fliggy or TUNIU): 48%
- Booked directly with the airline(s): 26%
- Booked by someone else in the travel party: 8%
- Other: 1%
- Did not need to book any flights: 0%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=398)
F12. How did you book your flight for this trip? (Select all that apply)

BOOKING ACCOMMODATIONS FOR RECENT TRIP

Travel agent/tour operator (NET): 65%

Booked online with a travel agent/tour operator (e.g. CITS, CYTS, or Utour): 37%

Booked in-person with a travel agent/tour operator (e.g. CITS, CYTS, or Utour): 30%

Booked on the phone with a travel agent/tour operator (e.g. CITS, CYTS, or Utour): 27%

Booked online through an online booking engine (e.g. Ctrip, Qunar, Fliggy or TUNIU): 46%

Booked through accommodation sharing services website (e.g. Airbnb): 23%

Booked through a visitors information centre at the destination: 20%

Booked directly with the lodging/accommodation establishment: 15%

Booked by someone else in the travel party: 6%

Did not need to book any accommodation: 1%

Booking with a travel agent or tour operator was the most popular way to book accommodations, followed by booking through an online booking engine.
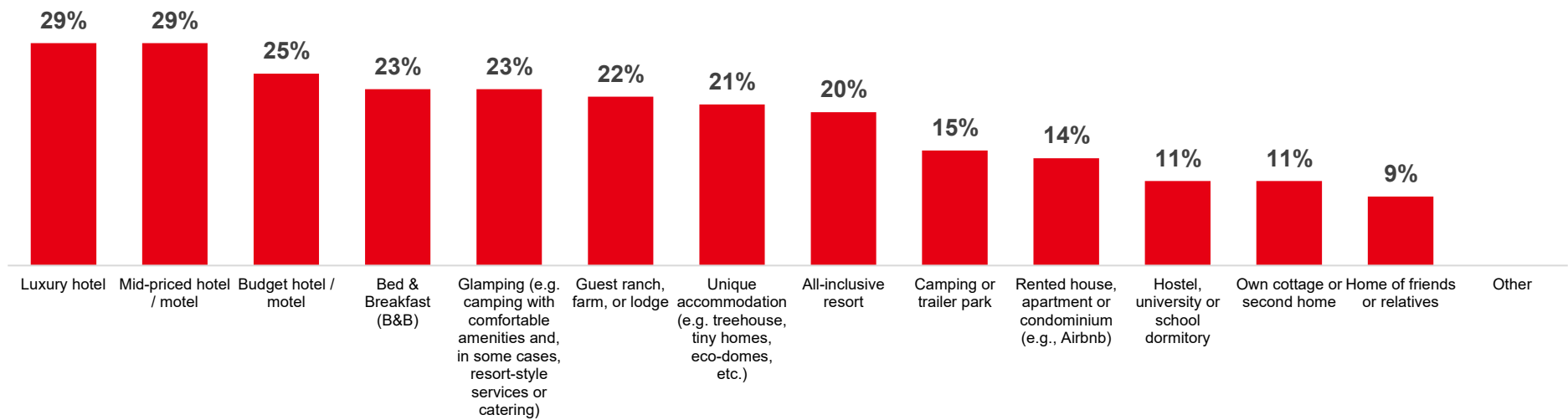
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=398)
F13. How did you book your accommodation for this trip? (Select all that apply)

China GTRP – December 2024

Mount Thor
Nunavut

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TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Nearly one third of Chinese travellers visiting Canada stayed at a luxury hotel, or a mid-priced hotel or motel.

Category	%
Luxury hotel	29%
Mid-priced hotel / motel	29%
Budget hotel / motel	25%
Bed & Breakfast (B&B)	23%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	23%
Guest ranch, farm, or lodge	22%
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	21%
All-inclusive resort	20%
Camping or trailer park	15%
Rented house, apartment or condominium (e.g., Airbnb)	14%
Hostel, university or school dormitory	11%
Own cottage or second home	11%
Home of friends or relatives	9%
Other	

Rideau Canal
Ontario

China GTRP – December 2024

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Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=398)
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

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