2024 GLOBAL TRAVELLER RESEARCH PROGRAM

CHINA FULL REPORT

Three Isle Lake *Alberta*

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA collective

TABLE OF CONTENTS

STUDY OVERVIEW: CHINA MARKET

DESTINATION CANADA

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:	**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

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
Expertise
Importance

Culture Seekers
Base motivations

Novel & Authentic
New Connections
Familiarity

Refined Globetrotters
Base motivations

Novel & Authentic
Bonding
Security

Purpose Driven Families
Base motivations

Bonding
Novel & Authentic
Escape & Relax

OTHER TRAVELLER SEGMENTS

City Trippers
Base motivations

Fun
Bonding
Escape & Relax

Simplicity Lovers
Base motivations

Escape & Relax
Familiarity
Security

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

DESTINATION CANADA

KEY INSIGHTS

KEY INSIGHTS

Canada’s Market Potential & Competitive Destinations

- The immediate market potential for Canada is 18.8M Chinese Travellers
- The four HEG segments represent eight in ten (81%) of the immediate market potential:
  - ✓ **Outdoor Explorers** are the largest segment and represent 5.1M Chinese Travellers
  - ✓ **Culture Seekers** are the second largest segment and represent 4.2M Chinese Travellers
  - ✓ **Refined Globetrotters** are the third segment and represent 4.1M Chinese Travellers
  - ✓ At 1.8M, **Purpose Driven Families** represent the smallest segment despite having the highest *incidence* of Chinese travellers who will definitely/very likely visit Canada in the next two years
- Almost six in ten (58%) say their knowledge of Canada is excellent or very good, ranking behind France, New Zealand and Australia. However, scores for Canada, and for majority of the destination are down compared to last year. HEGs are more likely to say they are familiar with Canada, ranking ahead of Australia
- Chinese Travellers associate Canada with having unique, natural wonders to discover, beautiful natural scenery and landscapes, great place to see wildlife in its natural habitat, and being a place where I can experience things I can’t at home
- On an unaided basis, Canada ranks behind other East Asian countries, Australia and France, when looking at destinations being seriously being considered for trips in the next 2 years – although mentions are on par with the United States. On an aided basis, Canada ranks ahead of the United States and on par with Australia, New Zealand, and the UK, but behind France.The biggest challenge for Canada is in converting those in the dream to purchase stage further down the funnel to actual visitation
- In addition, extreme weather conditions and safety concerns are the biggest barriers that would discourage Chinese travellers from visiting to Canada

KEY INSIGHTS

DESTINATION CANADA

Key Drivers & Opportunities by Priority Segment

Outdoor Explorers

- In terms of NPS, **Outdoor Explorers** score Canada the lowest (+38) among the four HEG segments
- Among **Outdoor Explorers**, Canada is well known for being *a safe place to visit and having unique, natural wonders to discover*
- Top drivers of holiday destination consideration are *being a destination that is personally meaningful to me.* Secondary drivers include *being a trending must-visit spot, has a culture that I would want to experience, and a place I want to visit with family*
- There is an opportunity for Canada to improve perceptions of *being a destination that is personally meaningful to me* (currently a weakness for Canada) and being *a place to visit with family* as no one destination currently owns these dimensions of importance

Refined Globetrotters

- In terms of NPS, **Refined Globetrotters** score Canada the highest (+47) among the four HEG segments
- When it comes to **Refined Globetrotters,** Canada delivers on being *a great place to see wildlife in its natural habitat*
- Top drivers of holiday destination consideration are *being a place I want to visit friends.* Secondary drivers include *being a destination that is personally meaningful to me, a place I want to visit with family, a trending must-visit spot, and having beautiful natural scenery and landscapes.*
- There is also an opportunity for Canada to improve perceptions on being *a place to visit with friends and family and being a destination that is personally meaningful to me* as no one destination currently owns these dimensions of importance

KEY INSIGHTS

Fall Travel

- Seasonal potential continues to be higher in the Fall (9.3M Total), almost double vs. the Winter (5.6M)
- Canada ranks 3rd, only behind Japan and China, as a top unaided Fall destination among their priority HEG segments
- Majority of Chinese travellers view Canada as a distinct Fall destination (83%), and this is higher among **Purpose Driven Families**
- Main barrier for Fall travel to Canada is not being able to take a holiday during these months (26%) on total and among **Refined Globetrotters**. While **Outdoor Explorers** are more likely to say there are too many crowds during these months.
- On the other hand, top motivators were the ideal weather (39%) and being able to take a holiday during these months (35%). Mentions of ideal weather have decreased, while being able to take a holiday has increased compared to last year. Among the priority segments, ideal weather is the key motivator for **Refined Globetrotters**, while **Outdoor Explorers** place greater importance on specific activities they want to do.

Winter Travel

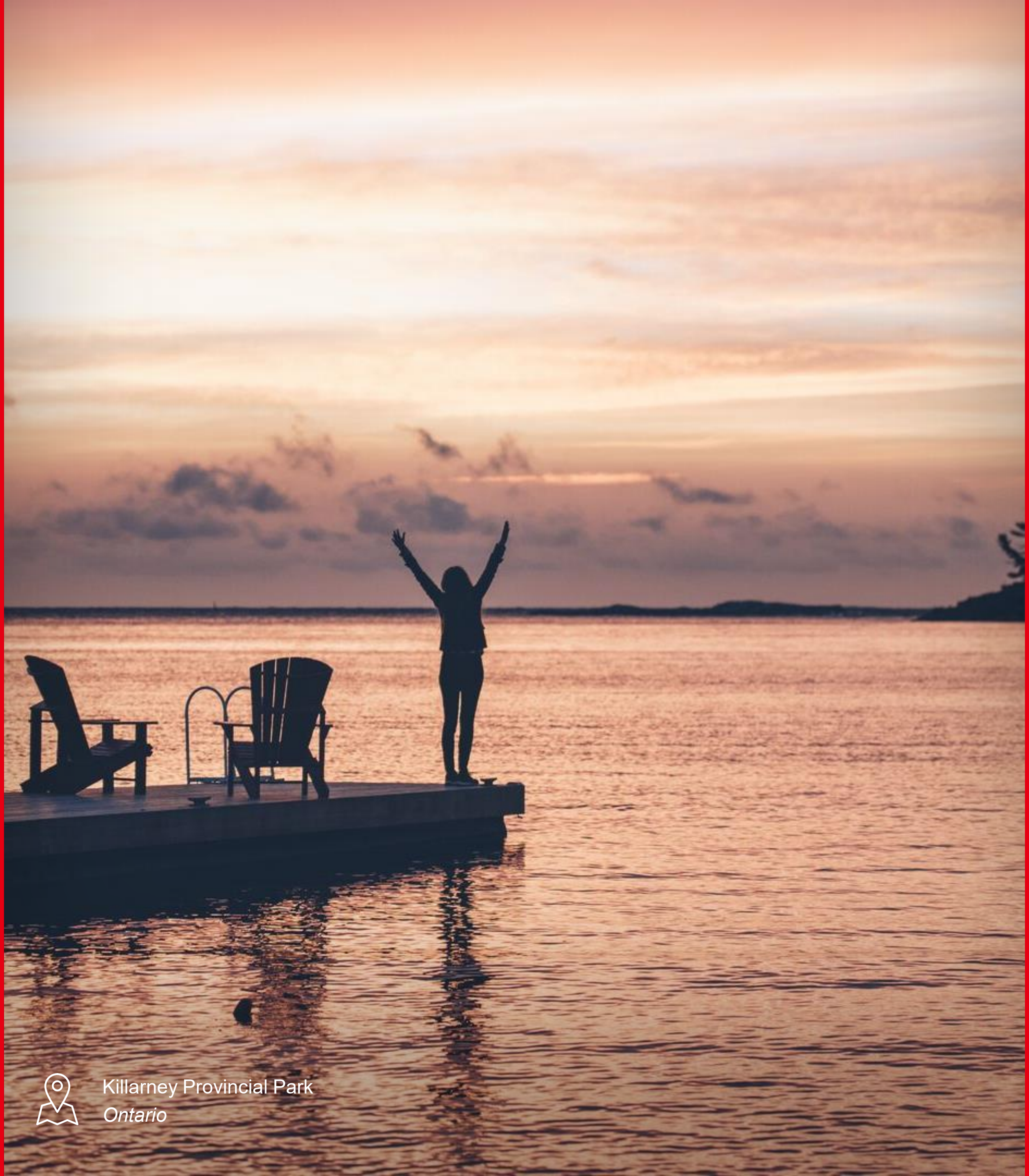
- Consideration to travel for the Winter is low for Canada among total Chinese travellers, but is slightly higher among HEGs
- For unaided Winter destinations, Canada ranks 3rd among **Outdoor Explorers** and 4th among **Refined Globetrotters**, behind East Asian countries
- Majority of Chinese travellers view Canada as a distinct Winter destination (83%), and this is highest among **Outdoor Explorers**
- When it comes to travelling to Canada during the Winter months, the main motivator is there being specific activities they want to do during these months, and this is true across all HEG segments. Mentions have also increased compared to last year, as well as being able to take a holiday during these months
- The main barrier to travelling to Canada in the Winter is the weather being too cold, and this is the biggest deterrent for **Refined Globetrotters** and **Culture Seekers**. Among **Outdoor Explorers**, being unable to take a holiday during these months is their biggest barrier

KEY INSIGHTS

DESTINATION CANADA

Recent Trip to Canada: Profile

- Almost seven in ten Chinese Travellers who travelled to Canada went for a holiday, increasing compared to last year and similar among HEGs
    - Summer, followed by Spring and Fall were the most popular time to visit
- Nature activities, like walks and parks, and lakeside or oceanside beaches were the top activities for **Outdoor Explorers** and **Refined Globetrotters**
- For travellers to Canada, travelling for a holiday and length of stay for their most recent trip has increased compared to last year. Travelling with a spouse or partner, children under 18, or with parents has also increased, while travelling with friends or alone/solo has decreased
- Usage of travel agents or tour operators and organized group tours for their entire trip have increased compared to a year ago, and the usage of travel agents/tour operators specifically for booking flights and accommodations has increased
- Compared to other destinations, trips to Canada differed in the following ways:
    - More likely to travel with parents and less likely to travel with friends
    - Usage of travel agents or tour operators in general was higher for travellers to Canada, but usage to specifically research accommodations or book activities was lower compared to travellers to other destinations
    - Travellers to Canada were more likely to use an organized group tour for their whole trip (46%) compared to 29% for other destinations
    - Travellers to Canada were more likely to book flights and accommodations with a travel agent or tour operator, and less likely to book through an online booking engine
    - More likely to stay at different types of accommodations compared to travellers to other destinations



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)

China's immediate potential has decreased compared to last year, with 18.8M Chinese travellers definitely or very likely to visit Canada in the next two 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 FOR CANADA (NEXT 2 YEARS): BY SEGMENT

DESTINATION CANADA

Among segments, Outdoor Explorers offer the largest immediate potential for Canada, with 5.1M travellers likely to visit in the next two years, followed by Culture Seekers at 4.2M. The Fall season has the biggest opportunity across all segments, compared to Winter.

	28,522,500 (Total Long-Haul Travellers)							
Total segment sizes	7,307,500 Outdoor Explorers		6,052,500 Culture Seekers		5,873,000 Refined Globetrotters		2,533,000 Purpose Driven Families	
X **Target Market for Canada** *(Those in the dream to purchase stages of the path to purchase for Canada)*	80.4%		83.3%		78.9%		78.3%	
= Size of the Target Market	**5,874,500**		**5,041,500**		**4,632,000**		**1,983,000**	
X **Immediate Potential for Canada** *(Will definitely/very likely visit Canada in the next 2 years[1])*	87.6%		83.3%		88.1%		92.3%	
= Immediate Potential	**5,145,000**		**4,197,000**		**4,081,500**		**1,829,500**	
X **Immediate Seasonal Potential** *(Consideration for Canada in [SEASON] in next 2 years)*	**Fall** 42.8%	**Winter** 30.1%	**Fall** 46.0%	**Winter** 22.9%	**Fall** 42.3%	**Winter** 22.6%	**Fall** 33.6%	**Winter** 21.7%
= Immediate Seasonal Potential	**Fall** 2,201,500	**Winter** 1,548,500	**Fall** 1,932,500	**Winter** 960,000	**Fall** 1,727,500	**Winter** 921,000	**Fall** 614,000	**Winter** 396,500

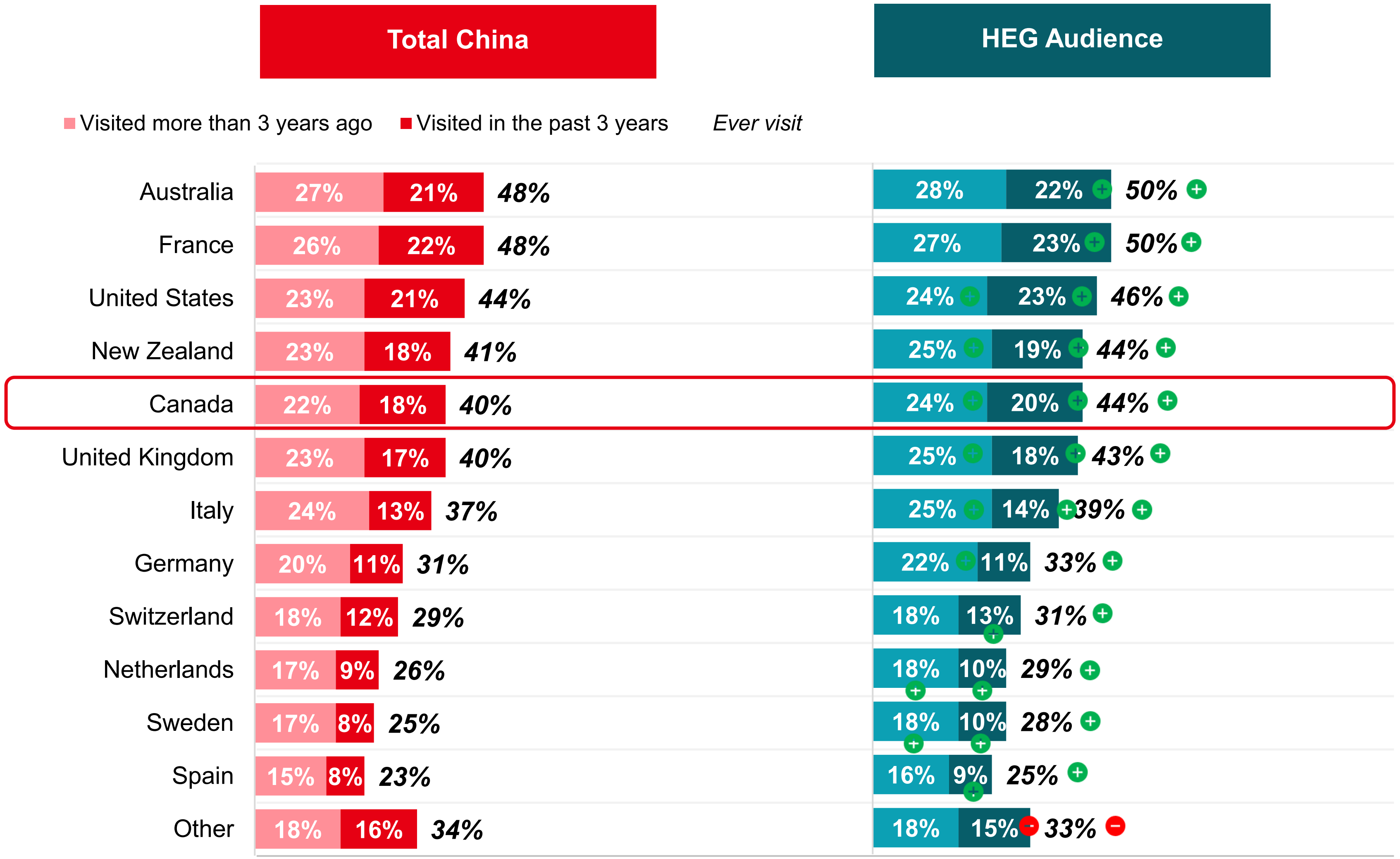
[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=571); Culture Seekers (n=473); Refined Globetrotters (n=459); Purpose Driven Families (n=198)
Immediate potential for Canada = dream to purchase stages for P2P for Canada: Outdoor Explorers (n=459); Culture Seekers (n=394); Refined Globetrotters (n=362); Purpose Driven Families (n=155)
Immediate autumn potential for Canada: Outdoor Explorers (n=402); Culture Seekers (n=328); Refined Globetrotters (n=319); Purpose Driven Families (n=143); Immediate winter potential for Canada: Outdoor Explorers (n=402); Culture Seekers (n=328); Refined Globetrotters (n=319); Purpose Driven Families (n=143)
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?

DESTINATION CANADA

CANADA VS. COMPETITORS

PAST VISITATION

Four in ten Chinese travellers have ever visited Canada, ranking 5th among the competitive set. Recent visitation is higher among HEGs.



Ever visit Canada:
Outdoor Explorers: 45%
Refined Globetrotters: 40%

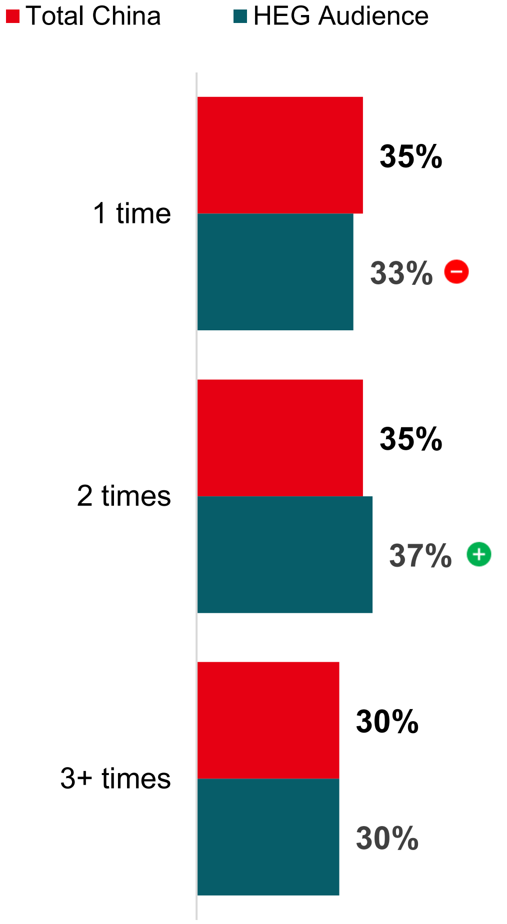
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229); HEG (n=1701)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** which was 1 or more nights long?

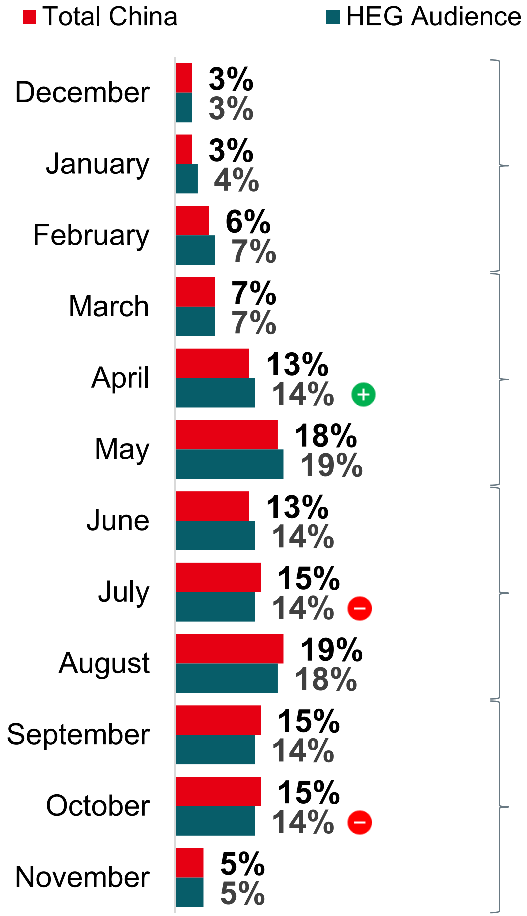
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

NUMBER OF VISITS EVER & TIME OF YEAR VISITED CANADA

DESTINATION CANADA

Summer, followed by Spring and Fall are the most popular seasons for both Chinese travellers and HEGs to travel to Canada





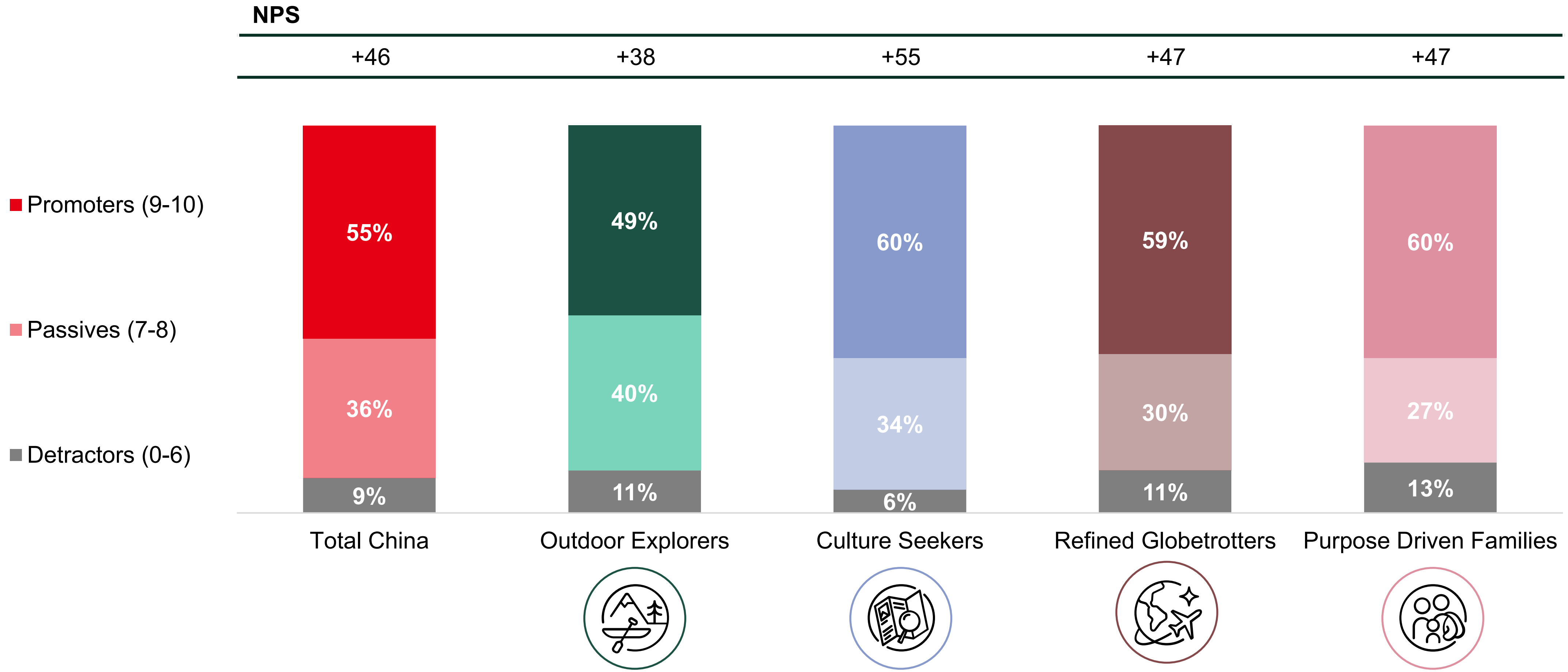
	Total Travellers	Total HEG Travellers
Winter	12%	12%
Spring	33%	34% ⊕
Summer	42%	42%
Fall	31%	31%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada (n=883); HEG (n=748)
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

Canada ranks first in terms of NPS against the competitive set. Among the segments, Culture Seekers, followed by Refined Globetrotters and Purpose Driven Families score Canada the highest.

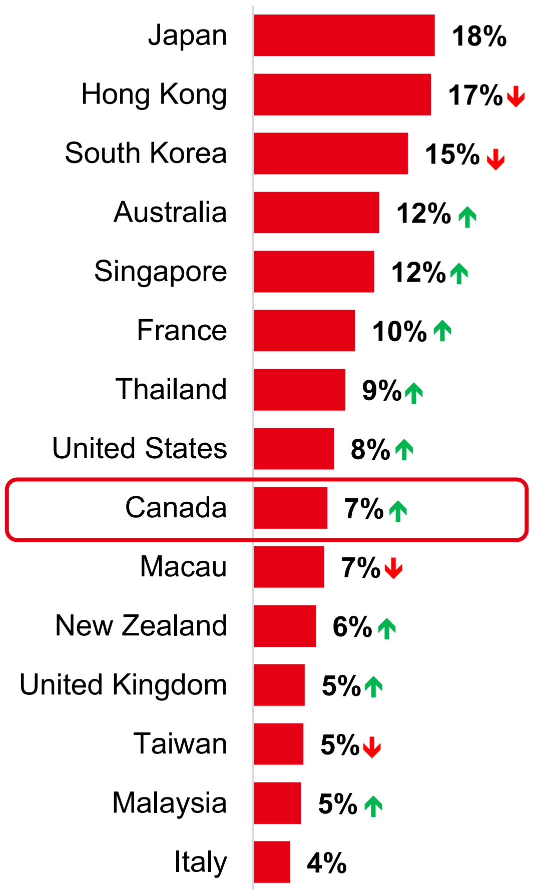


Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada: Total (n=883); Outdoor Explorers (n=255); Culture Seekers (n=209); Refined Globetrotters (n=184); Purpose Driven Families (n=100)
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

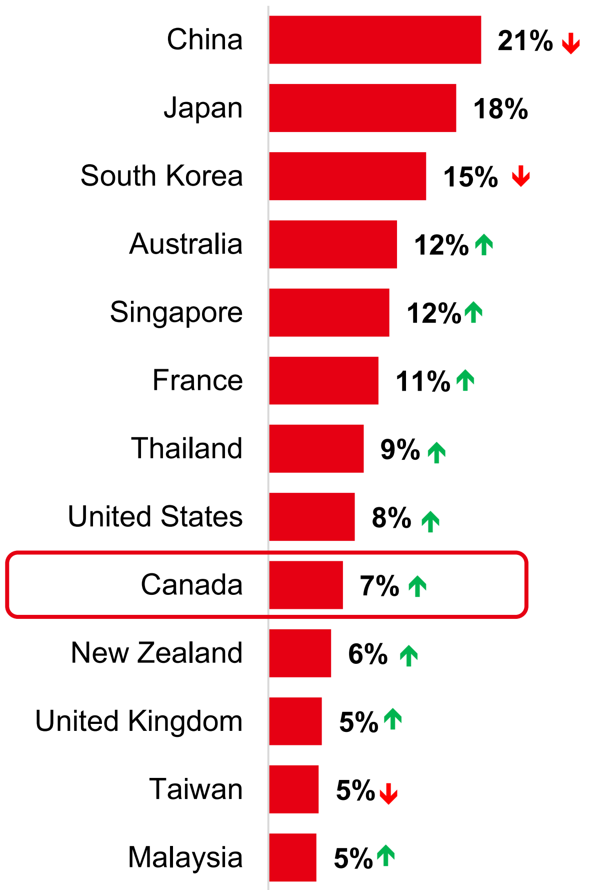
UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)

East Asian countries and Australia continue to be top travel choices, with their proximity likely influencing the increased consideration. While Canada's mentions have risen, it still ranks in the mid-tier, on par with the United States.

Top Destination Brands[1]



Top Destinations[2]



Canada:
Outdoor Explorers: 11%
Refined Globetrotters: 8%

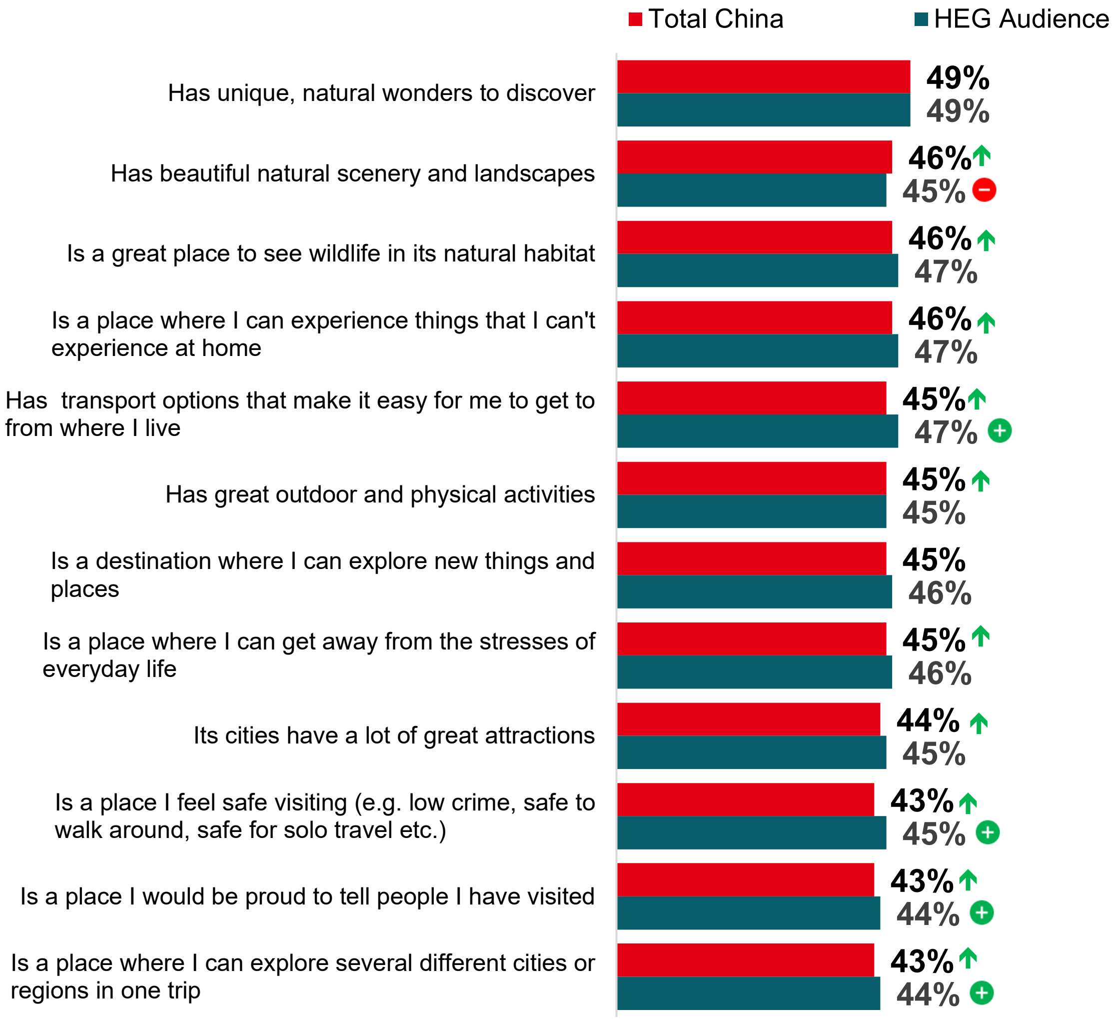
[1] Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229)
B1. You mentioned that you 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)

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

IMPRESSIONS OF CANADA AS A HOLIDAY DESTINATION

DESTINATION CANADA

Canada's overall impression has improved, with the highest attributes focusing on its natural beauty, wildlife, and unique experiences.

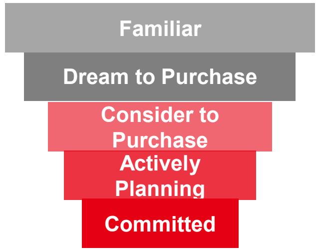


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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

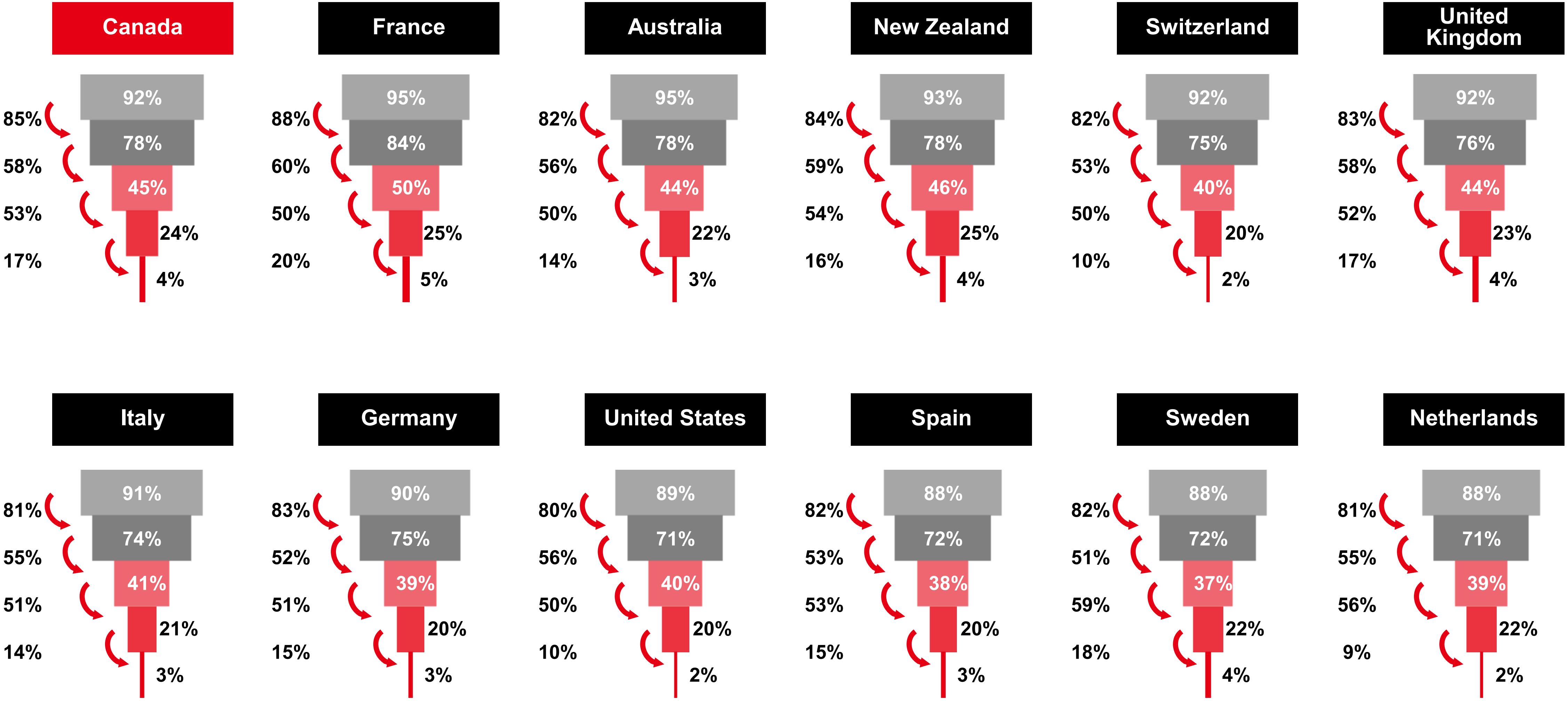
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229); HEG (n=1701)
C6. We are interested in your general impressions about destinations even if you have never been there. Please 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 CHINA



DESTINATION CANADA

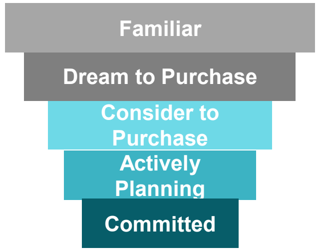
45% Chinese travellers are seriously considering a trip to Canada in the next two years, ahead of the United States and on par with Australia, New Zealand, and the UK, but behind France.

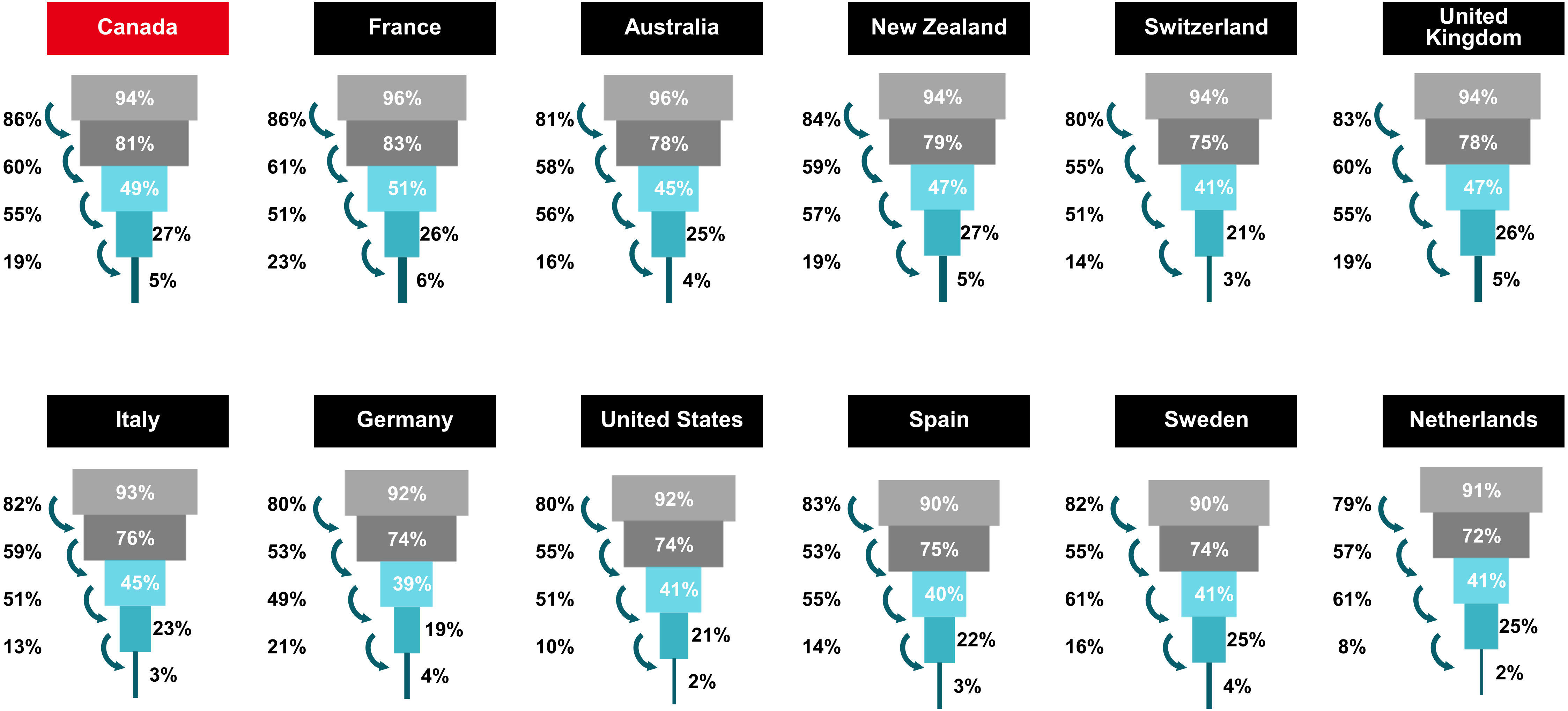


Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
See notes for question wording and funnel definitions

CONSIDERATION FUNNELS: AMONG HEG TRAVELLERS

HEGs are more likely to seriously consider a trip to Canada in the next two years, ahead of New Zealand and the UK but still behind France.

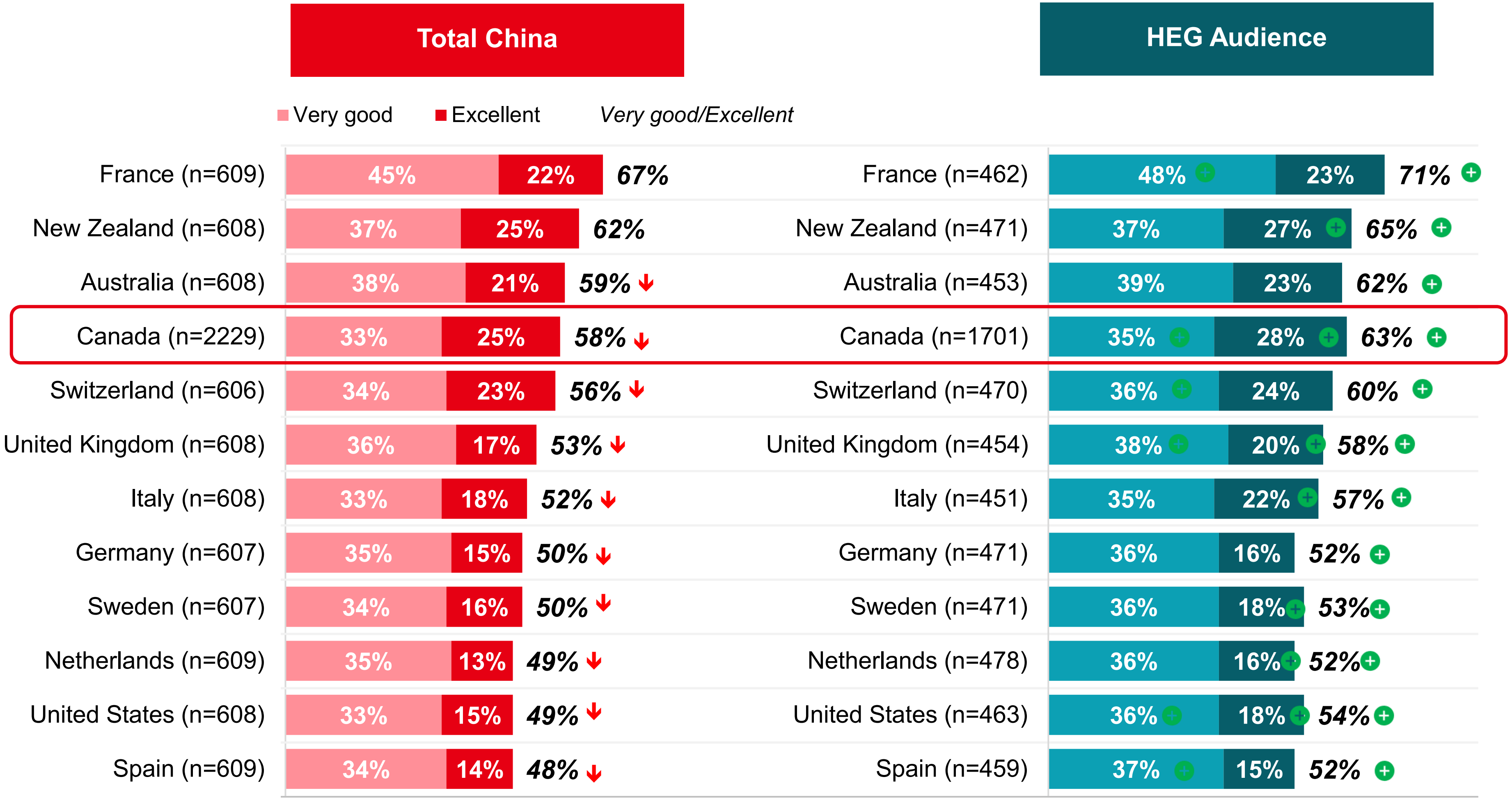




Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEG, Evaluated [DESTINATION]
See notes for question wording and funnel definitions

LEVEL OF KNOWLEDGE OF HOLIDAY OPPORTUNITIES

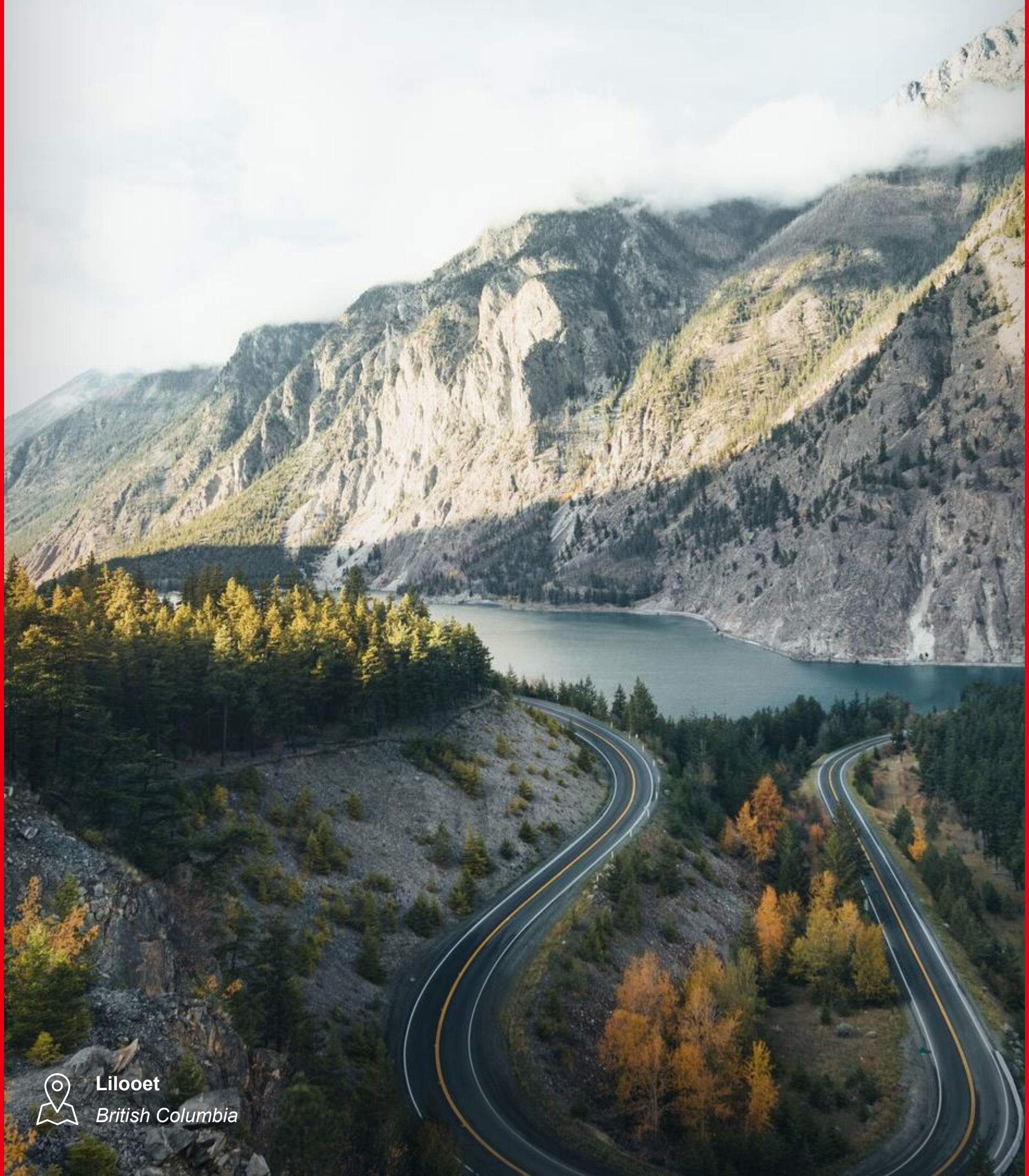
A general decline in self perceived knowledge of destination. Chinese HEG travellers are perceived as more knowledgeable about Canada than all Chinese travellers.



/ = 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)

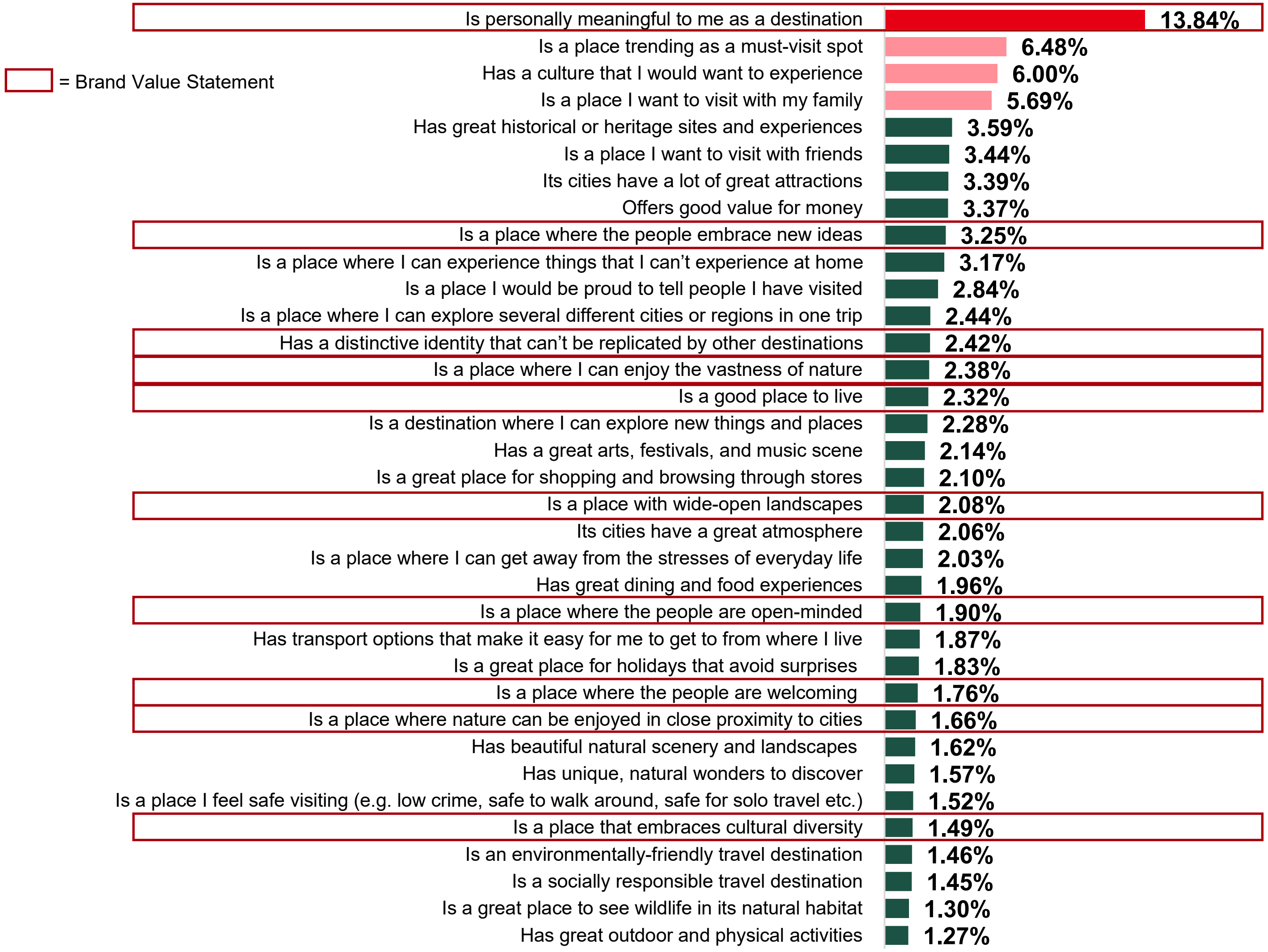


KEY DRIVERS

DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (OUTDOOR EXPLORERS)

DESTINATION CANADA

Being a personally meaningful destination to me is the top factor for Outdoor Explorers as they consider destinations. Secondary drivers include being a trending must-visit spot, has a culture I want to experience, and being a place I want to visit with family.



<u>Description</u>

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.

<u>Interpretation</u>

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), Outdoor Explorers (n=571)
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 (OUTDOOR EXPLORERS)

DESTINATION CANADA

To OEs, Canada is a place I feel safe visiting and has unique, natural wonders to discover. There is currently an open opportunity for being a place to visit with family, a secondary driver.

		Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
	n=	571	154	165	159	132	160	155	152	159	159	157	161
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life											Strength	
Higher Order Motivations	Is a place I would be proud to tell people I have visited					Strength							
Higher Order Motivations	Is a destination where I can explore new things and places		Strength						Weakness				Strength
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength											
General Needs	Is a place where I can explore several different cities or regions in one trip							Weakness					
General Needs	Offers good value for money			Weakness				Strength			Strength		Weakness
General Needs	Has transport options that make it easy for me to get to from where I live		Weakness	Strength				Weakness				Strength	Strength
Type of Trip	Is a place I want to visit with friends					Strength							
Type of Trip	Is a place I want to visit with my family												
Type of Trip	Is a great place for holidays that avoid surprises										Strength		
Type of Trip	Is a place where I can experience things that I can't experience at home							Strength				Weakness	
Type of Trip	Is an environmentally-friendly travel destination								Strength			Weakness	
Type of Trip	Is a socially responsible travel destination			Weakness								Strength	
Type of Trip	Is a place trending as a must-visit spot		Strength	Strength			Weakness				Strength		
To-Do	Is a great place for shopping and browsing through stores		Weakness								Strength		
To-Do	Its cities have a lot of great attractions												
To-Do	Has great outdoor and physical activities			Weakness					Strength				
To-Do	Has great dining and food experiences			Strength									
To-Do	Has a great arts, festivals, and music scene		Weakness						Strength				
To-See	Its cities have a great atmosphere					Strength					Weakness		
To-See	Has beautiful natural scenery and landscapes		Strength	Weakness		Weakness		Strength	Weakness				
To-See	Is a great place to see wildlife in its natural habitat					Weakness		Strength					
To-See	Has great historical or heritage sites and experiences		Weakness		Strength							Strength	Weakness
To-See	Has a culture that I would want to experience							Weakness		Strength			
To-See	Has unique, natural wonders to discover	Strength										Weakness	

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), Outdoor Explorers, 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 (OUTDOOR EXPLORERS)

In terms of brand value statements, Canada is seen as a place with wide-open landscapes. Of concern, Canada currently has a weakness in terms of being a destination that is personally meaningful to me, a key driver to destination consideration.

	Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
n=	571	154	165	159	132	160	155	152	159	159	157	161
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												

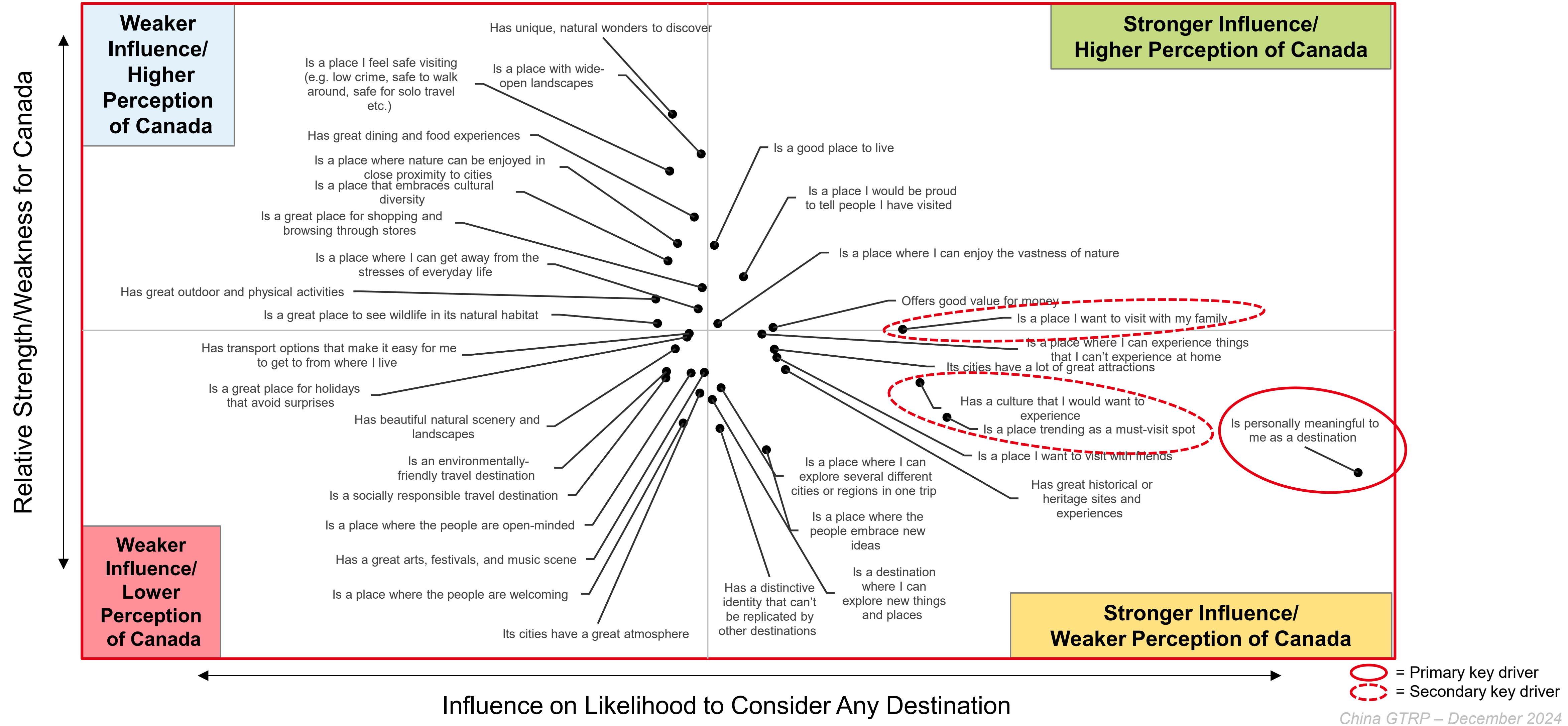
No destination has a strength for this statement

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), Outdoor Explorers, 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 (OUTDOOR EXPLORERS)

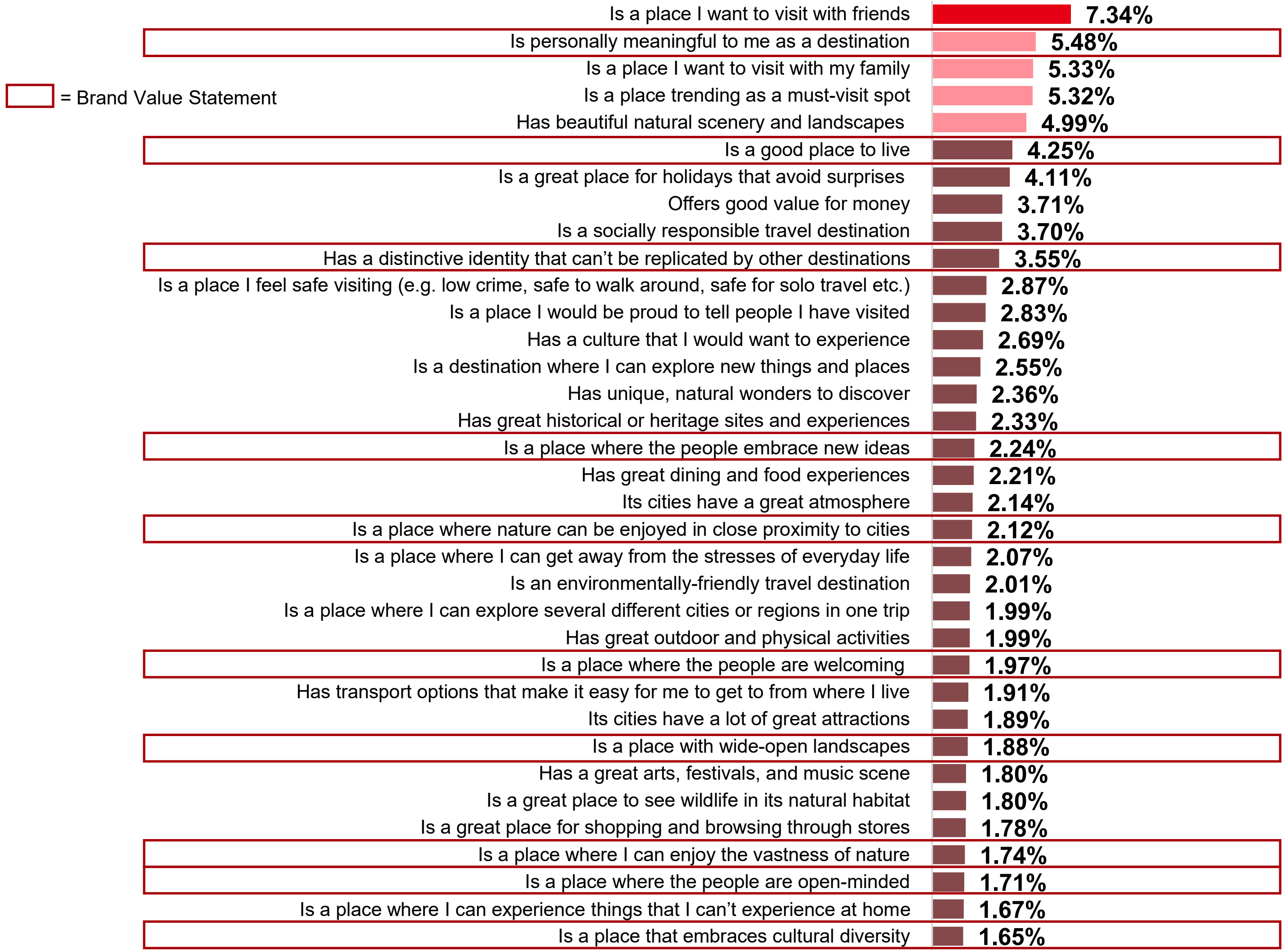
Perceptions of Canada being a place I want to visit with family are higher and should continue to be maintained. However, there is opportunity to further develop perceptions of Canada as being a destination that is personally meaningful to me, is a trending must-visit spot, and having a culture that I would want to experience.



DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (REFINED GLOBETROTTERS)

DESTINATION CANADA

Being a place I want to visit with friends is the top driver for Refined Globetrotters as they consider destinations. Secondary drivers include being personally meaningful to me, a place I want to visit with family, a trending must-visit spot, and having beautiful natural scenery and landscapes.



<u>Description</u>

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.

<u>Interpretation</u>

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), Refined Globetrotters (n=459)
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 (REFINED GLOBETROTTERS)

DESTINATION CANADA

To RGs, Canada is known for 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	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
	n=	459	121	119	132	124	135	130	124	120	129	126	117
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life												
	Is a place I would be proud to tell people I have visited												
	Is a destination where I can explore new things and places			Weakness					Strength				
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)										Strength		Weakness
	Is a place where I can explore several different cities or regions in one trip				Strength								
	Offers good value for money					Strength							
	Has transport options that make it easy for me to get to from where I live		Weakness					Weakness		Weakness		Strength	Strength
Type of Trip	Is a place I want to visit with friends												
	Is a place I want to visit with my family							Strength					Weakness
	Is a great place for holidays that avoid surprises												
	Is a place where I can experience things that I can't experience at home									Weakness			
	Is an environmentally-friendly travel destination			Weakness									
	Is a socially responsible travel destination		Weakness							Strength			
	Is a place trending as a must-visit spot												
To-Do	Is a great place for shopping and browsing through stores		Weakness	Strength				Weakness		Weakness		Strength	Strength
	Its cities have a lot of great attractions							Weakness					
	Has great outdoor and physical activities												
	Has great dining and food experiences			Strength									Weakness
	Has a great arts, festivals, and music scene	Weakness	Weakness			Strength			Strength				
To-See	Its cities have a great atmosphere		Weakness										
	Has beautiful natural scenery and landscapes		Strength					Strength				Weakness	
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness	Weakness	Weakness		Strength					
	Has great historical or heritage sites and experiences		Weakness	Strength				Weakness					Weakness
	Has a culture that I would want to experience			Strength									
	Has unique, natural wonders to discover			Weakness									

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), Refined Globetrotters, 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 (REFINED GLOBETROTTERS)

DESTINATION CANADA

Similar to OEs, RGs associate Canada with having wide-open landscapes. There is currently an open opportunity for being a destination that is personally meaningful to me, a secondary driver.

	Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
n=	459	121	119	132	124	135	130	124	120	129	126	117
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												

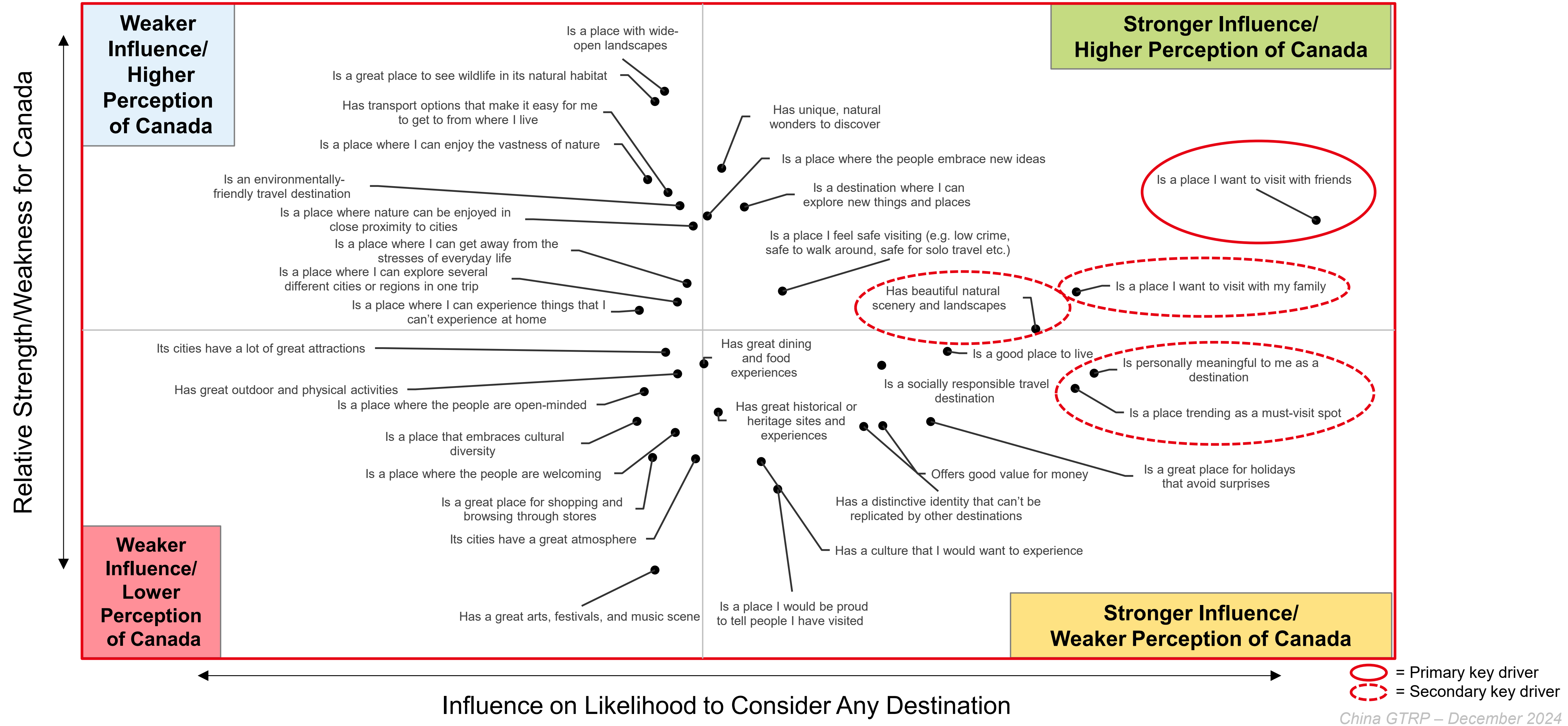
No destination has a strength for this statement	
Strength	Weakness

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), Refined Globetrotters, 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 (REFINED GLOBETROTTERS)

DESTINATION CANADA

Perceptions of Canada being a place I want to visit with friends and family, and having beautiful natural scenery and landscapes are higher and should continue to be maintained. However, there is opportunity to further develop perceptions of Canada as being a destination that is personally meaningful to me and is a trending must-visit spot.



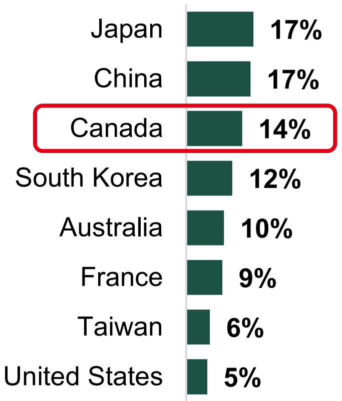
DESTINATION CANADA

SEASONAL TRAVEL

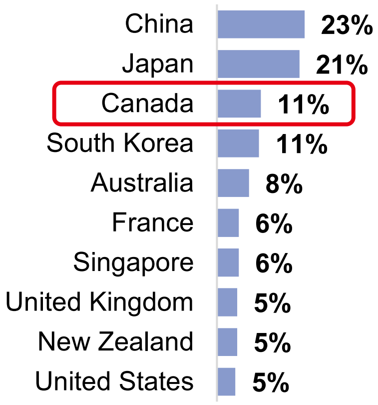
TOP UNAIDED FALL DESTINATIONS: BY SEGMENTS

Canada ranks third as a top unaided fall destination, behind China and Japan, but ranks lower among PDFs.

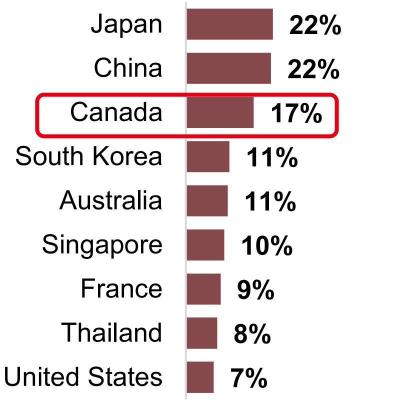
Outdoor Explorers
(n=278)



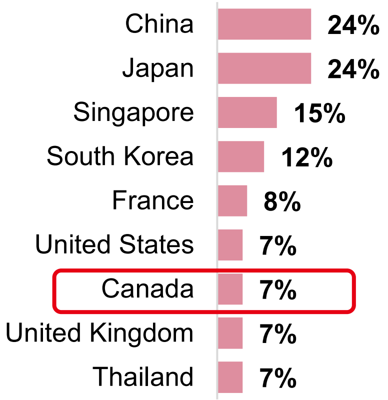
Culture Seekers
(n=230)



Refined Globetrotters
(n=223)



Purpose Driven Families
(n=91)

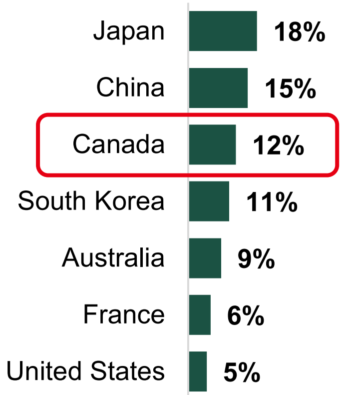


Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You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

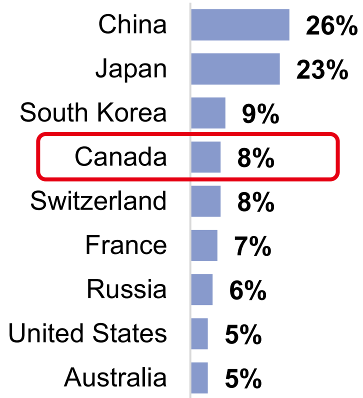
TOP UNAIDED WINTER DESTINATIONS: BY SEGMENTS

Canada ranks behind East Asian countries as a top winter destination for OEs, CSs, and RGs. Among Purpose-Driven Families, Australia is mentioned more, pushing Canada to fourth place.

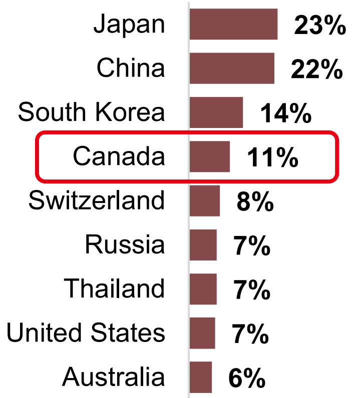
Outdoor Explorers
(n=293)



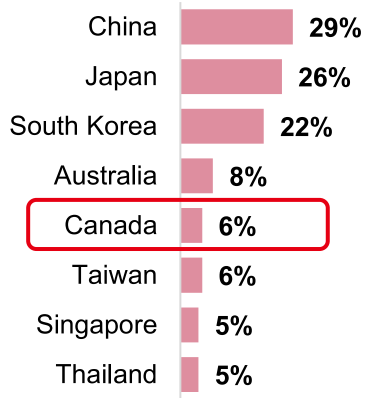
Culture Seekers
(n=243)



Refined Globetrotters
(n=236)



Purpose Driven Families
(n=107)



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 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.

SEASONAL CONSIDERATION BY DESTINATION

DESTINATION CANADA

Canada is one of the top considerations for fall travel among Chinese travellers and HEGs, with consideration increasing compared to last year among total.

Total China	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=474)	31%	37%	38%	32%
Canada (n=1736)	25%	34% ↓	35%	42% ↑
France (n=512)	21%	36%	39%	38% ↑
Germany (n=453)	22%	36%	40%	38% ↑
Italy (n=452)	19%	36%	36%	38%
Netherlands (n=430)	18%	37%	41%	37%
New Zealand (n=476)	26%	39%	38%	38%
Spain (n=438)	22%	33% ↓	36%	36%
Sweden (n=438)	26%	33% ↓	36%	36%
Switzerland (n=457)	29%	38%	36%	39% ↑
United Kingdom (n=460)	24%	33% ↓	41%	38% ↑
United States (n=434)	29% ↑	35%	38%	35%

HEG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=354)	31%	39%	38%	33%
Canada (n=1370)	26%	35% ⊕	35%	42%
France (n=385)	24% ⊕	36%	39%	40%
Germany (n=350)	24%	37%	41%	38%
Italy (n=344)	20%	35%	38%	39%
Netherlands (n=342)	19%	38%	41%	37%
New Zealand (n=372)	26%	42% ⊕	39%	38%
Spain (n=343)	24%	32%	39% ⊕	36%
Sweden (n=348)	27%	32%	37%	35%
Switzerland (n=351)	28%	40%	38%	41%
United Kingdom (n=352)	25%	36% ⊕	40%	38%
United States (n=343)	31%	37%	38%	36%

↑ / ↓ = 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 CHINA

DESTINATION CANADA

Interest in fall travel, including trips to Canada, has grown since last year. Canada's immediate potential for fall (9.3M) is nearly double that of winter(5.6M).

Fall

49.3% ↑
Demand During Fall **Months**
(any destination)

14,061,500

94%

46.3% ↑
Extremely Interested in Visiting a Destination During its Fall **Season**
(any destination)

13,203,000

70%

41.7% ↑
Next 2 Year Potential Target Market **for CANADA During Fall Season**

9,265,500

Winter

19.7% ↑
Demand During Winter **Months**
(any destination)

5,604,500

198%

38.9%
Extremely Interested in Visiting a Destination During its Winter **Season**
(any destination)

11,104,000

51%

25.3%
Next 2 Year Potential Target Market **for CANADA During Winter Season**

5,618,000

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=2229)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? Total (n=1091)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=1138)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? Total (n=1736)

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

FALL/WINTER CONVERSION – HEGS

A similar pattern is true among HEGs, Canada's potential target market is higher for the fall, with 7.4M HEGs compared to 4.5M for winter.

Fall

48.1%
Demand During Fall **Months**
(any destination)

10,467,000

98%

47.0%
Extremely Interested in Visiting a Destination During its Fall **Season**
(any destination)

10,221,000

73%

42.3%
Next 2 Year Potential Target Market **for CANADA During Fall Season**

7,422,000

Winter

18.9%
Demand During Winter **Months**
(any destination)

4,120,000

216%

40.8%
Extremely Interested in Visiting a Destination During its Winter **Season**
(any destination)

8,889,000

50%

25.6%
Next 2 Year Potential Target Market **for CANADA During Winter Season**

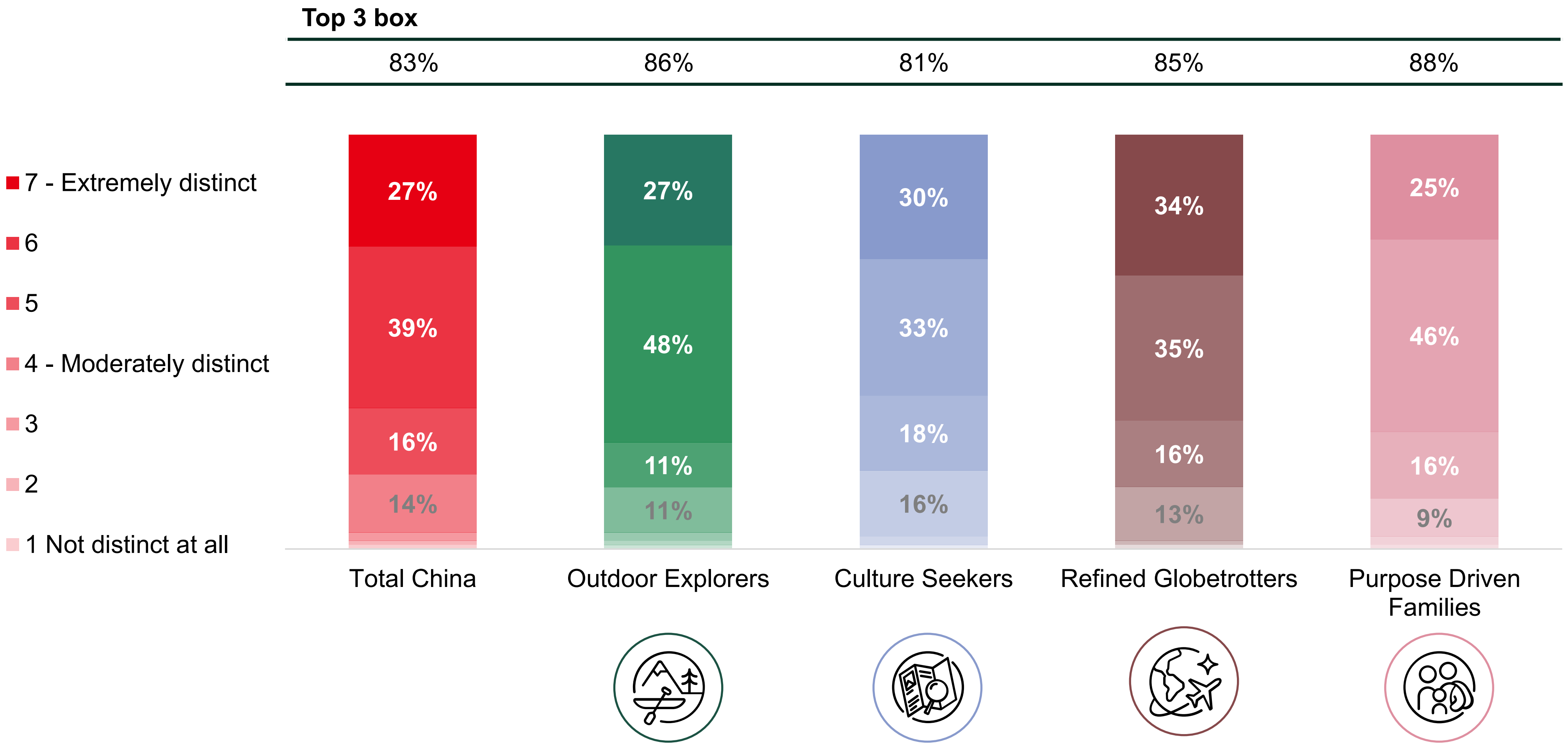
4,479,000

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=1701)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=822)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=879)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? (n=1370)

UNIQUENESS OF CANADA AS FALL DESTINATION: BY SEGMENTS

DESTINATION CANADA

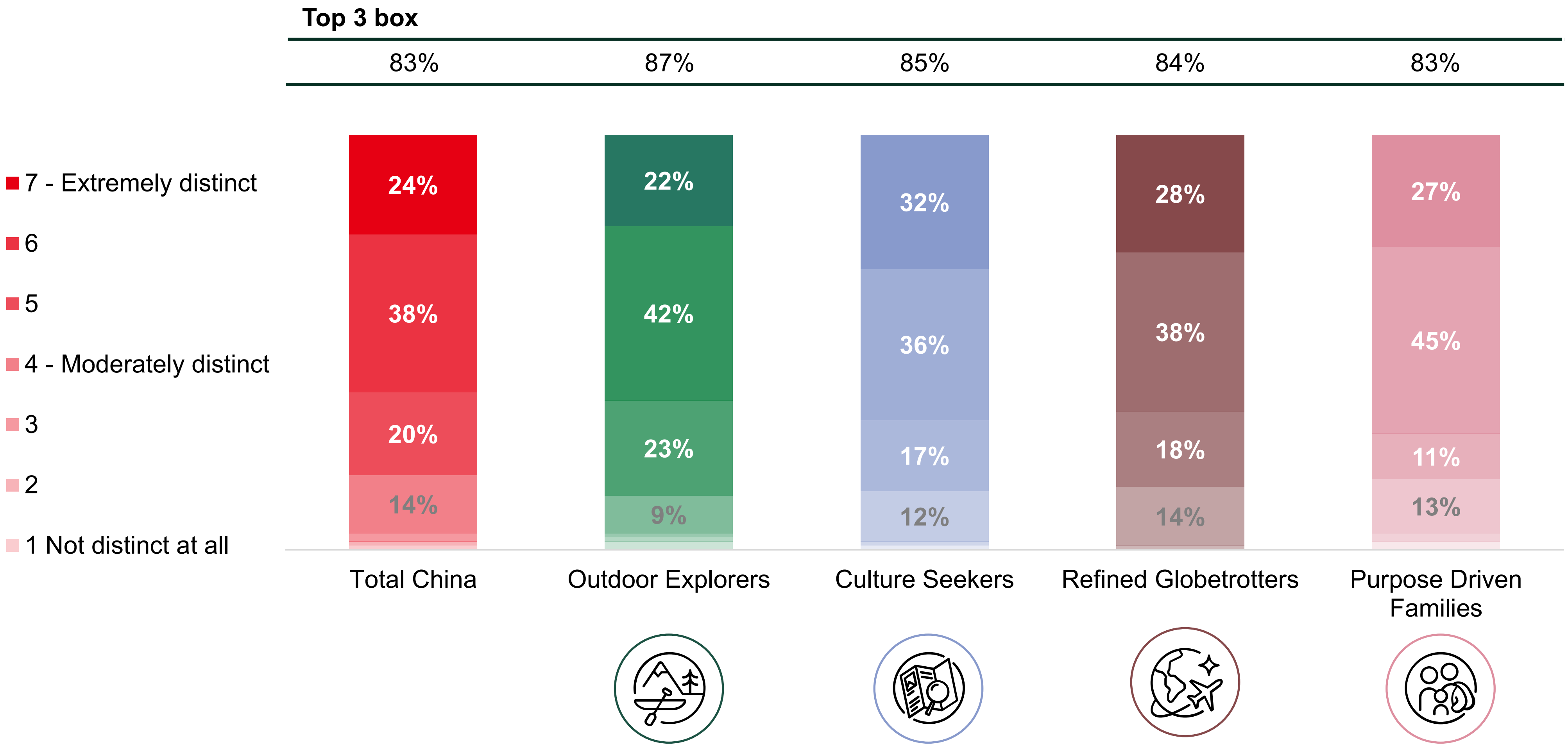
More than 80% of Chinese travellers see Canada as a distinct fall destination, with even higher recognition among Purpose-Driven Families.



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=1091); Outdoor Explorers (n=278); Culture Seekers (n=230); Refined Globetrotters (n=223); Purpose Driven Families (n=91)
E14. How distinct is Canada as an autumn travel destination?

UNIQUENESS OF CANADA AS WINTER DESTINATION: BY SEGMENTS

83% of Chinese travellers view Canada as a distinct winter destination, and this is highest among Outdoor Explorers.

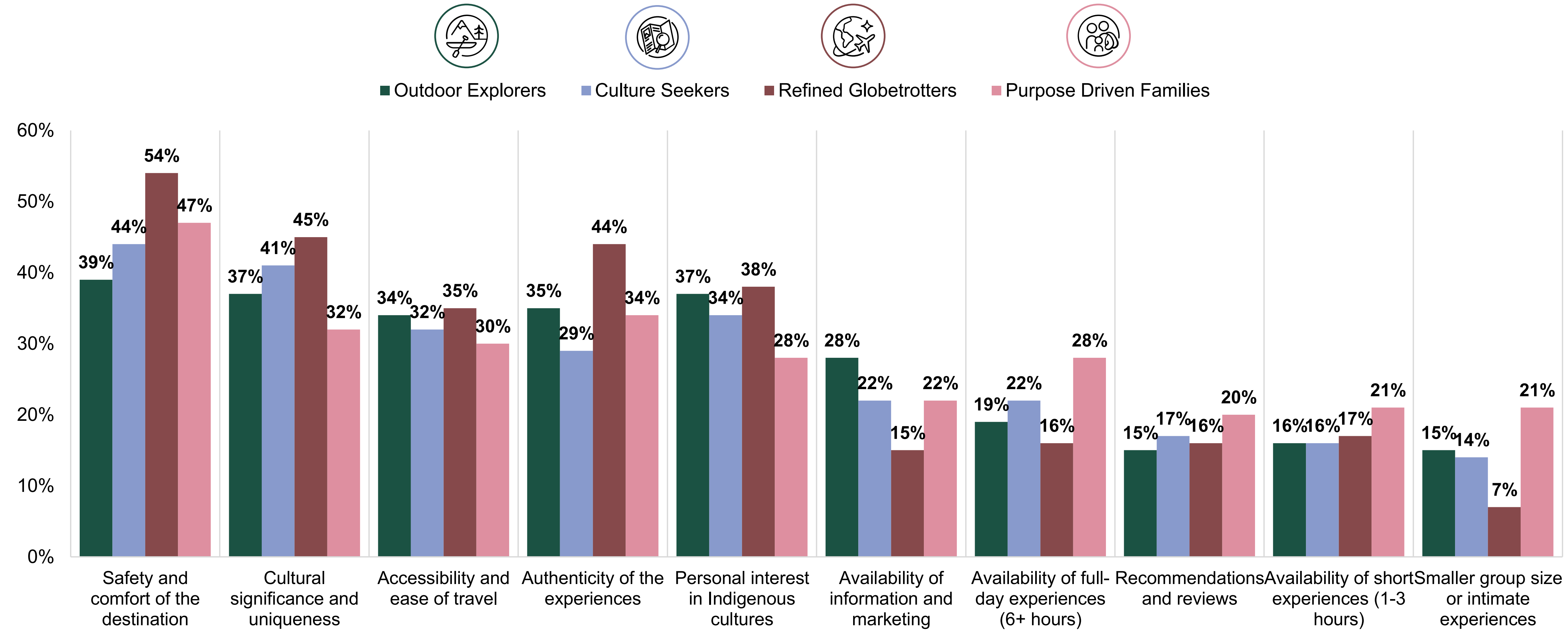


Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=1138); Outdoor Explorers (n=293); Culture Seekers (n=243); Refined Globetrotters (n=236); Purpose Driven Families (n=107)
E13. How distinct is Canada as a winter travel destination?

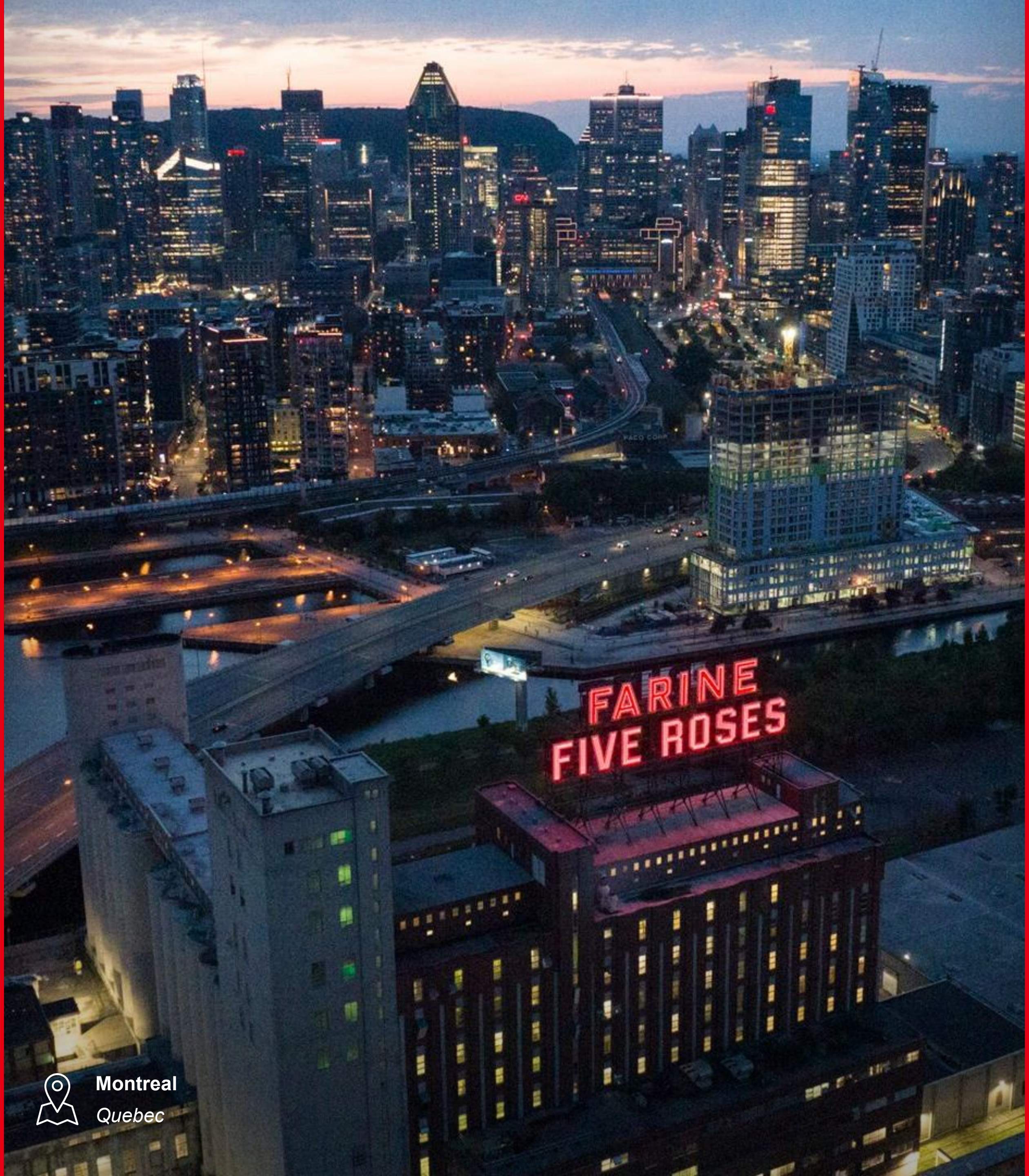
INDIGENOUS TRAVEL

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES: BY SEGMENTS

Safety and comfort, cultural significance, and accessibility are the top drivers of interest in Indigenous experiences. Notably, RGs prioritize safety and comfort, while OEs rank personal interest in Indigenous cultures as their second most important factor.



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=283); Culture Seekers (n=241); Refined Globetrotters (n=229); Purpose Driven Families (n=117)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

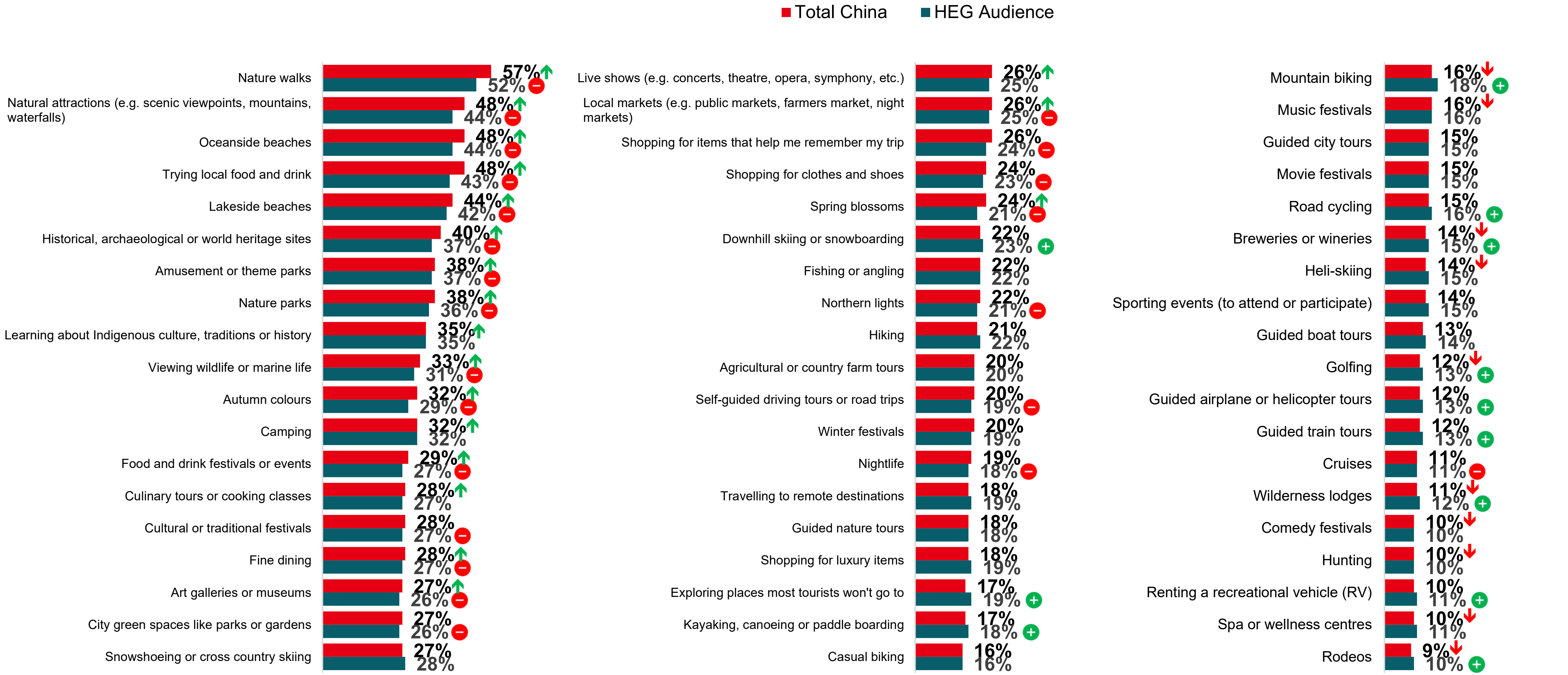


TRAVEL BEHAVIOURS

GENERAL ACTIVITIES INTERESTED IN

DESTINATION CANADA

Top activities on any holiday include nature walks, nature attractions, oceanside beaches, and trying local food/drink. Of note, HEGs are less likely to be interested in the top activities.



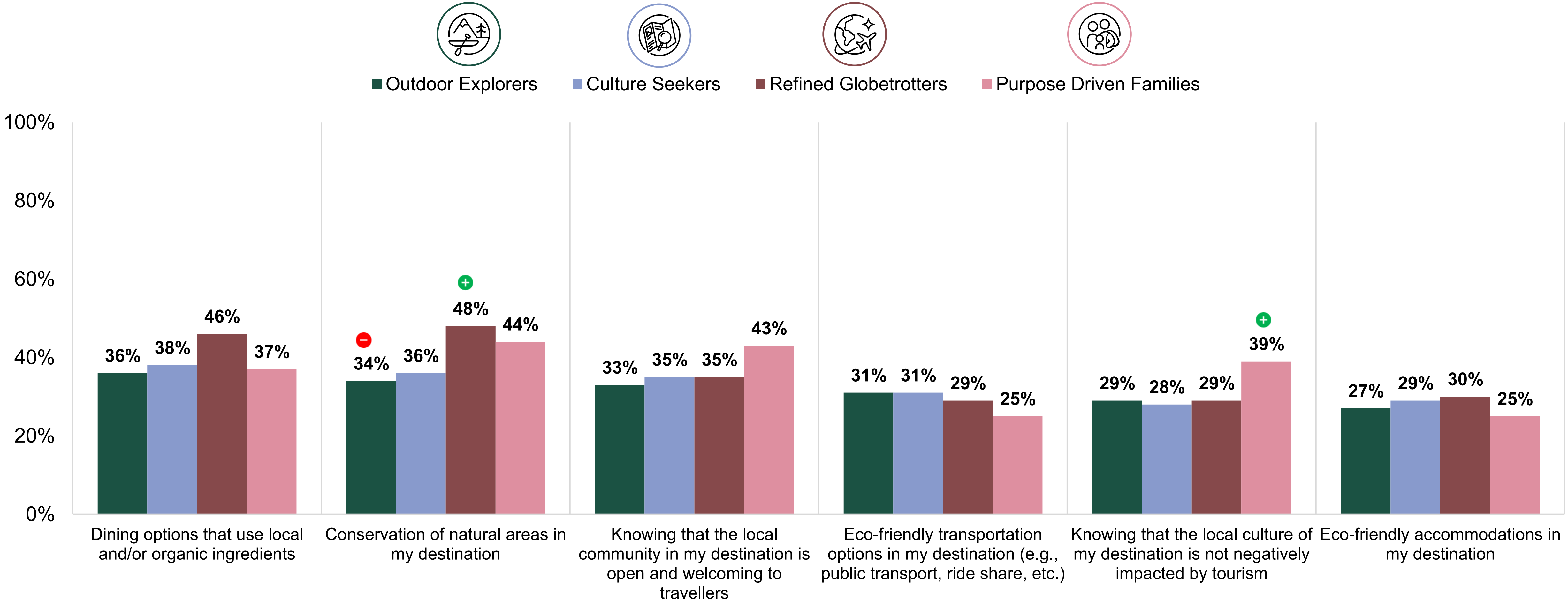
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2229); HEG (n=1701)
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

Importance of various sustainability efforts vary by segment. In particular, Refined Globetrotters place higher importance on the conservation of natural areas in my destination, while Outdoor Explorers are opposite.



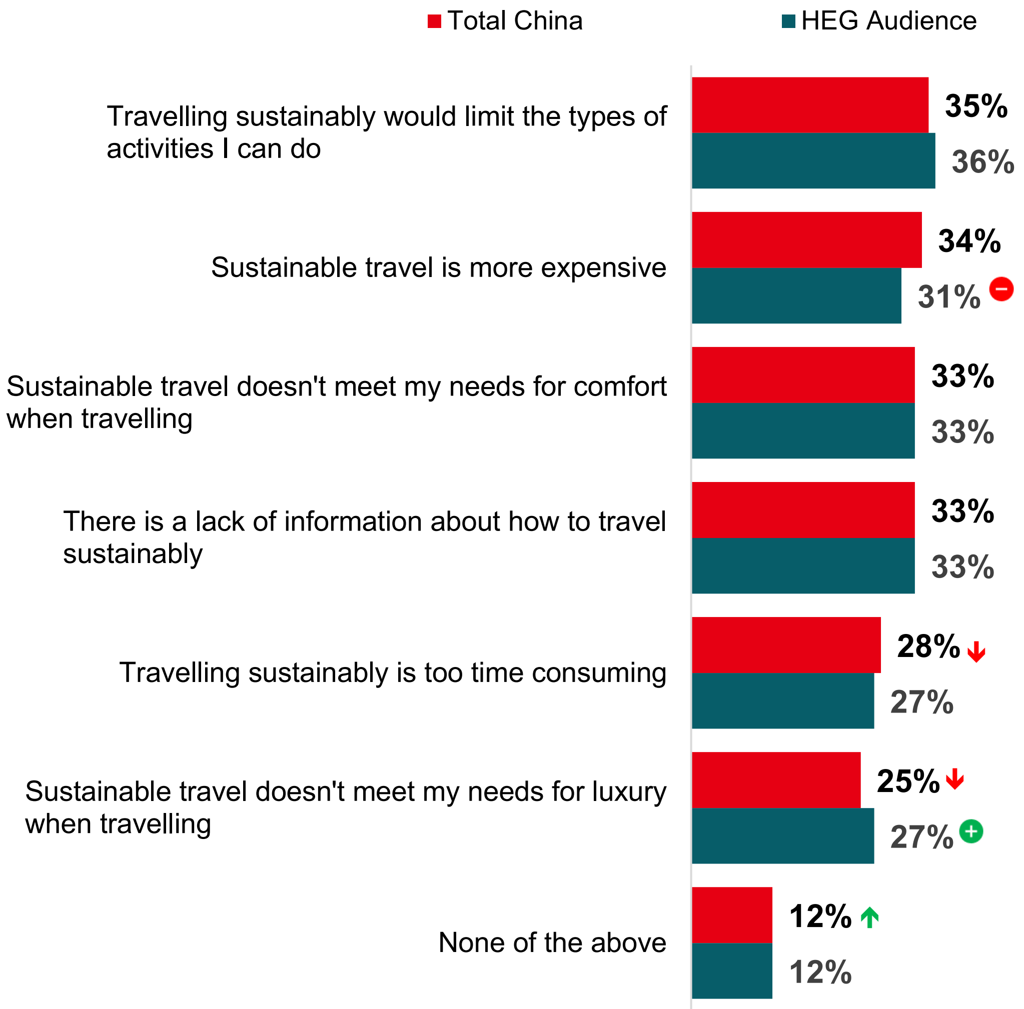
Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=273); Culture Seekers (n=241); Refined Globetrotters (n=237); Purpose Driven Families (n=102)
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

DESTINATION CANADA

The biggest barriers to sustainable travel are the limitations to the types of activities they can do and being expensive. Of note, HEGs are less likely to say being expensive is a barrier, and more likely to say it does not meet their needs for luxury.



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".

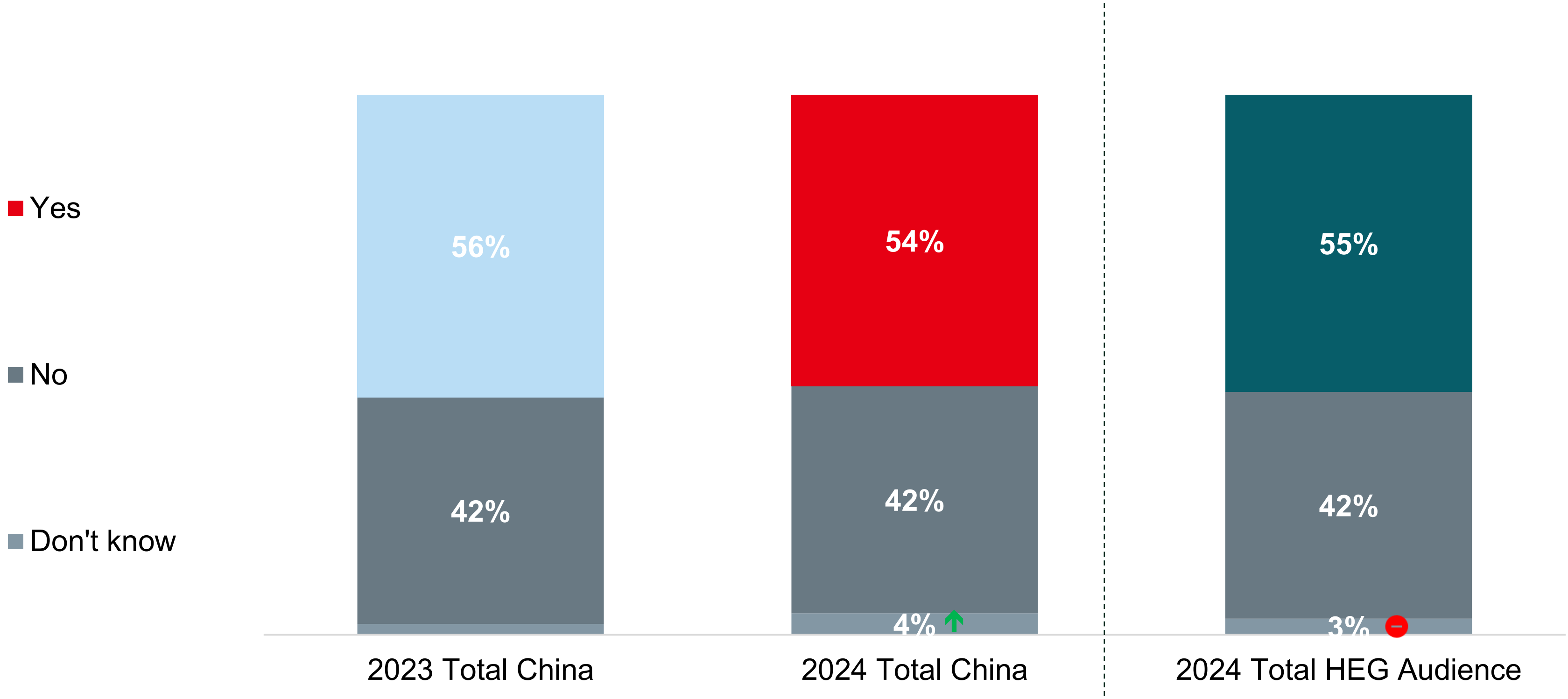
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = 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=1113); HEG (n=848)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

USAGE OF AI TOOLS TO PLAN TRIPS

Over half of Chinese travellers used AI for trip planning, consistent with last year and similar among HEGs.



/ = 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) (n=2229); HEG (n=1701)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

Summerside
Prince Edward Island

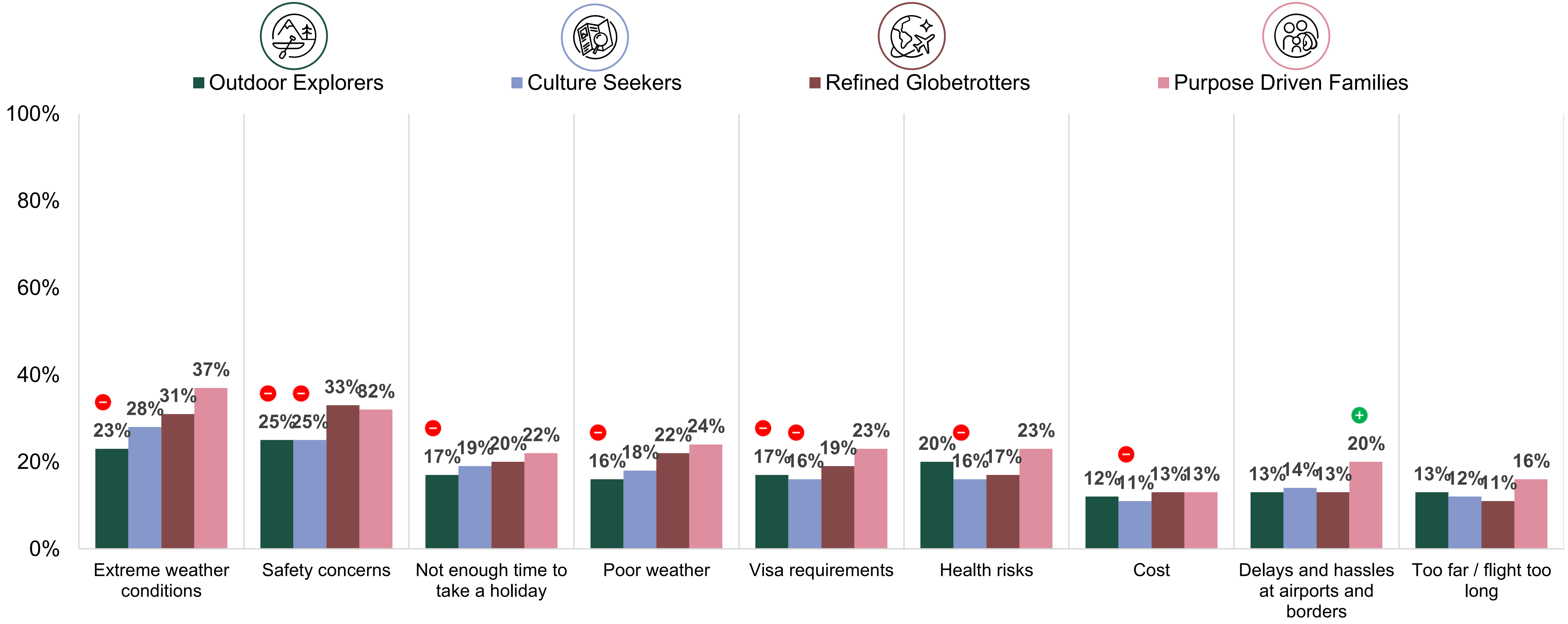
DESTINATION CANADA

CANADA TRAVEL BARRIERS AND MOTIVATORS

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

DESTINATION CANADA

Safety concerns is the biggest barrier for travelling to Canada among OEs and RGs, while extreme weather conditions is the biggest barrier among CSs and PDFs.



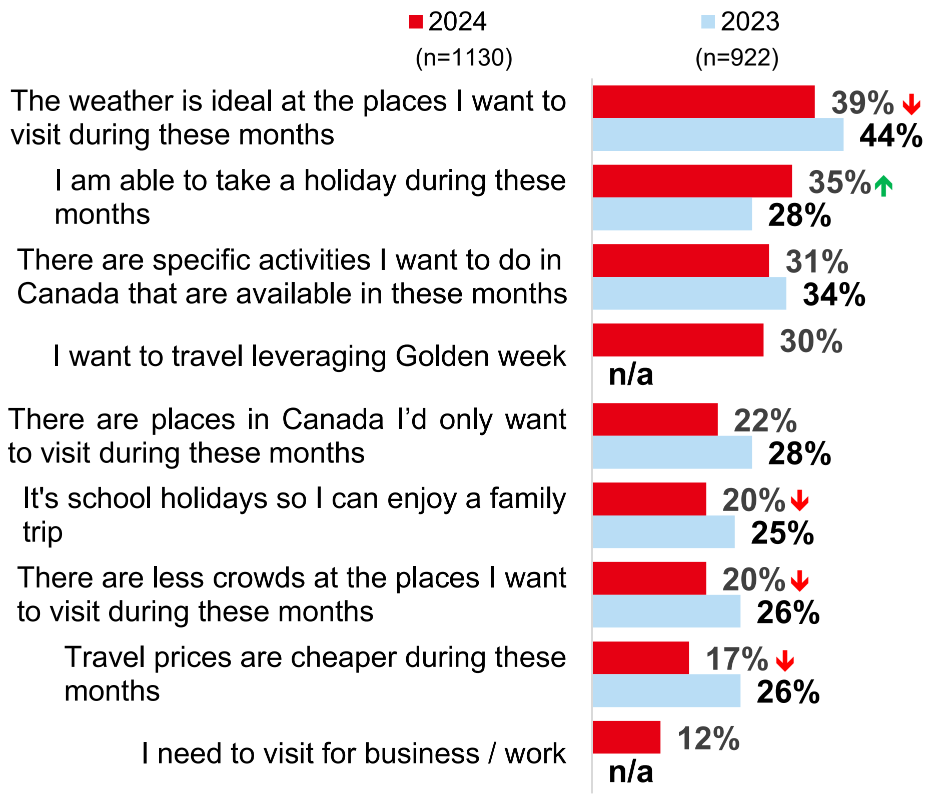
Base: Long-haul pleasure travellers (past 3 years or next 2 years) Outdoor Explorers (n=571); Culture Seekers (n=473); Refined Globetrotters (n=459); Purpose Driven Families (n=198)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

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

MOTIVATORS & BARRIERS FOR FALL TRAVEL TO CANADA

Ideal weather and being able to take a holiday are the top motivators for travelling to Canada in the Fall months. Of note, mentions for ideal weather has decreased while being able to take a holiday has increased compared to last year. That said, being unable to take a holiday during these months remains the biggest barrier.

Motivators for Fall Travel



Barriers for Fall Travel

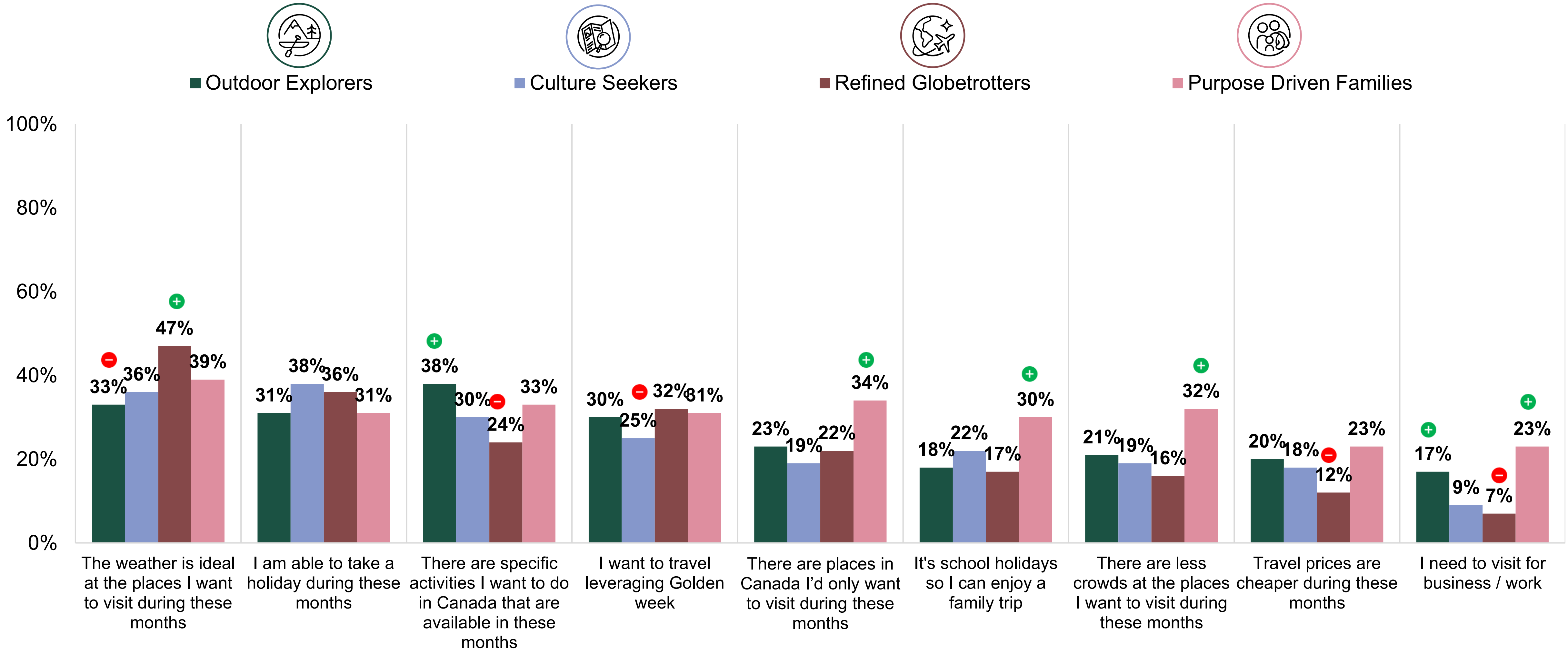
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or 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 not considering 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

DESTINATION CANADA

Ideal weather is the top motivator for RGs and PDFs, while specific activities they want to do in Canada is the biggest motivator for OEs.



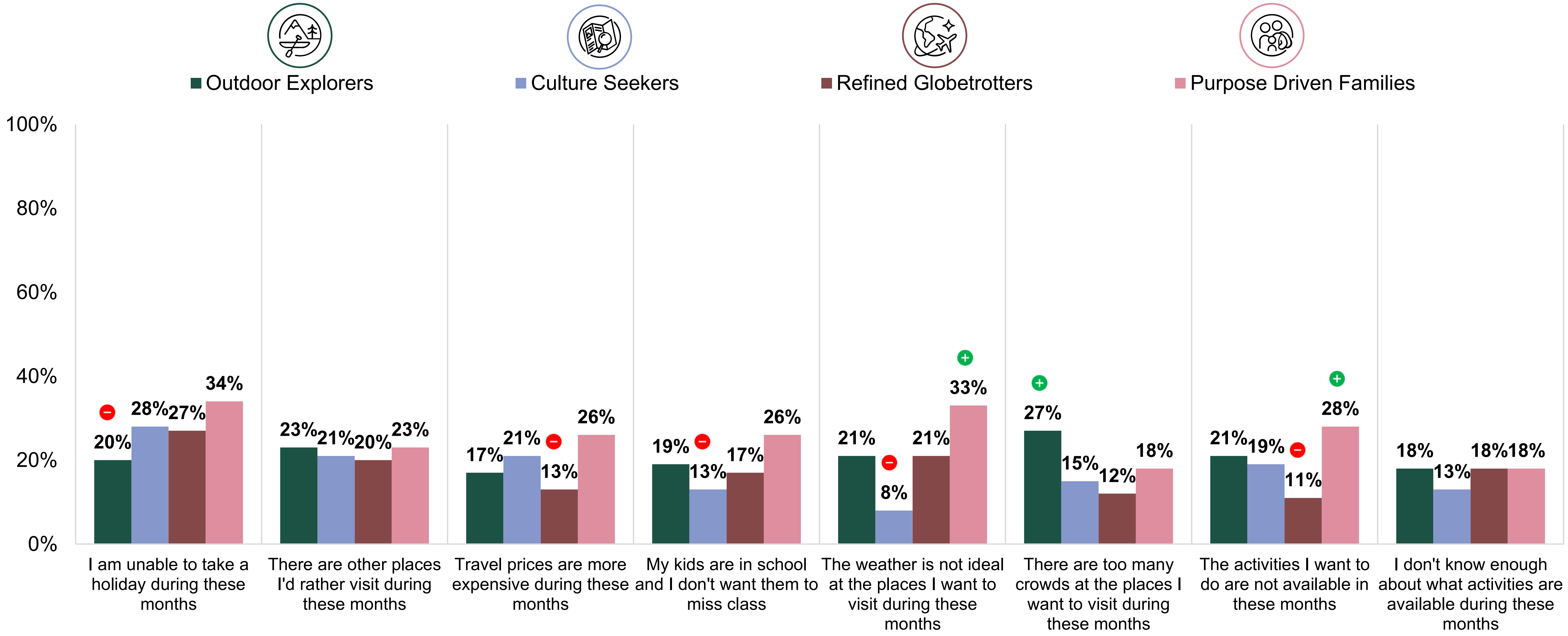
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=287); Culture Seekers (n=268); Refined Globetrotters (n=248); Purpose Driven Families (n=94)
E6a. You indicated 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

Being unable to take a holiday during fall is the biggest barrier for RGs, CSs and PDFs, while OEs are most likely deterred by crowds.



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=172); Culture Seekers (n=126); Refined Globetrotters (n=114); Purpose Driven Families (n=61)
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**?

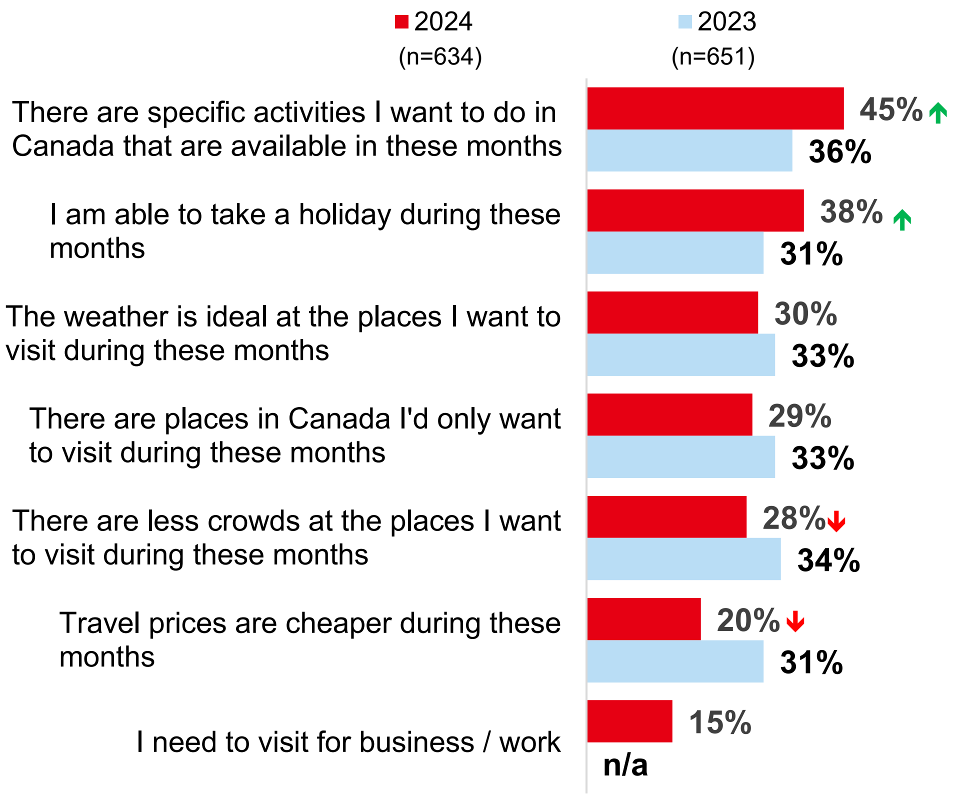
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

MOTIVATORS & BARRIERS FOR WINTER TRAVEL TO CANADA

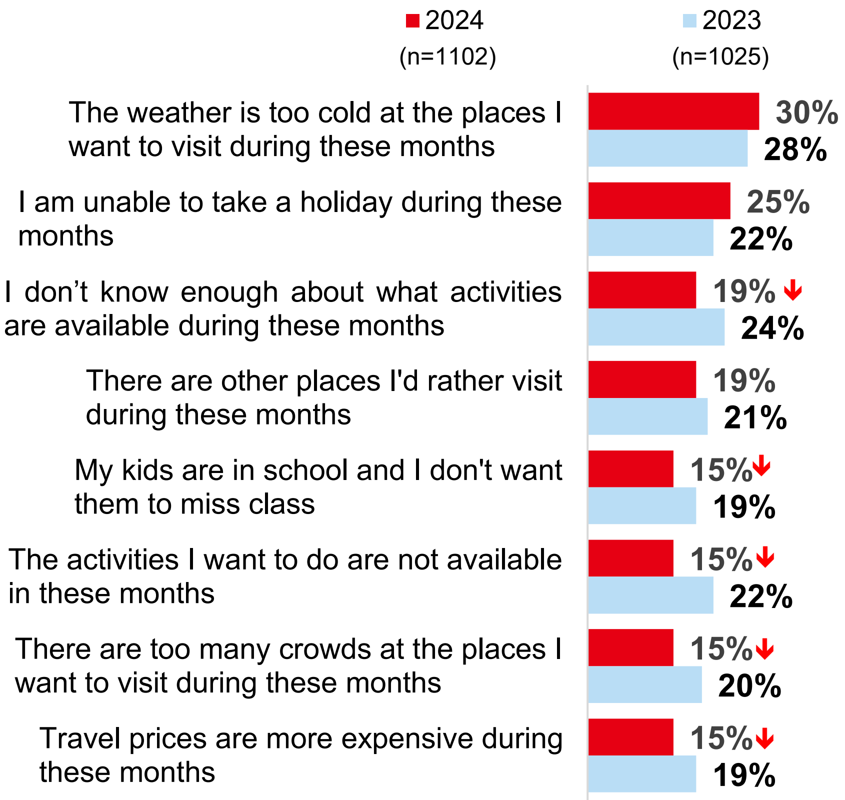
DESTINATION CANADA

Interest in winter travel to Canada is driven by specific activities and the ability to take a holiday during the season, both of which have increased since last year. However, cold weather remains the top deterrent.

Motivators for Winter Travel



Barriers for Winter Travel



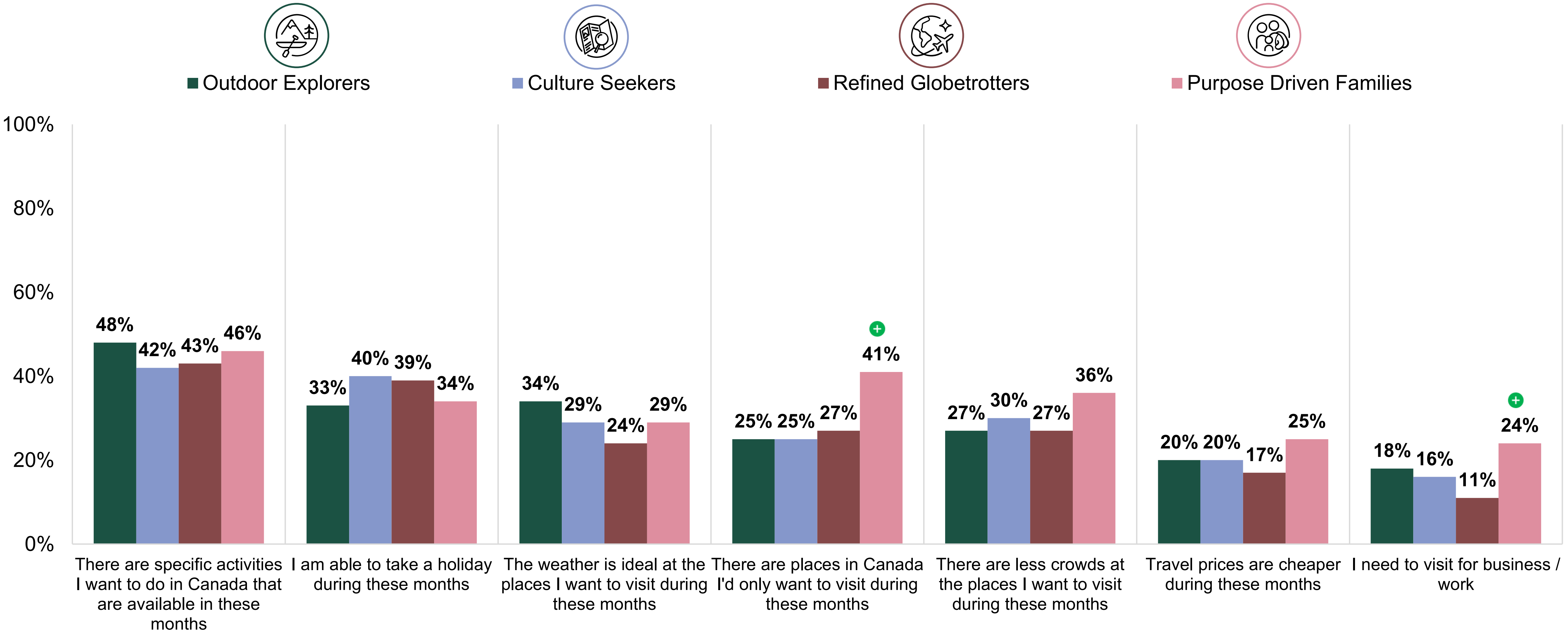
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… 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**?

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

MOTIVATORS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

DESTINATION CANADA

There being specific activities they want to do in Canada during the Winter months is the biggest motivator for all segments.

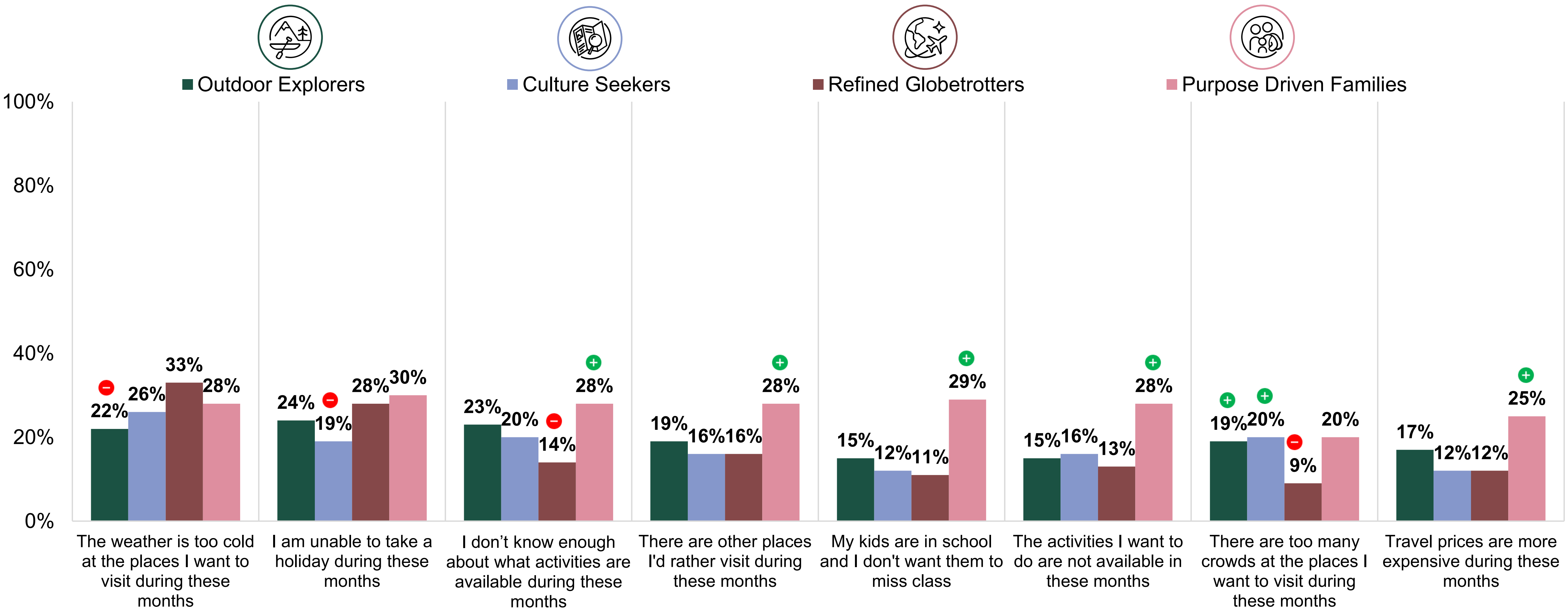


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February: Outdoor Explorers (n=181); Culture Seekers (n=144); Refined Globetrotters (n=117); Purpose Driven Families (n=59)
E8a. You indicated 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 biggest deterrent for RGs and CSs, while OEs and PDFs are more likely to cite scheduling conflicts as their main barrier to winter travel.



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=278); Culture Seekers (n=250); Refined Globetrotters (n=245); Purpose Driven Families (n=96)
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**?

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

Le Pays de la Sagouine

New Brunswick

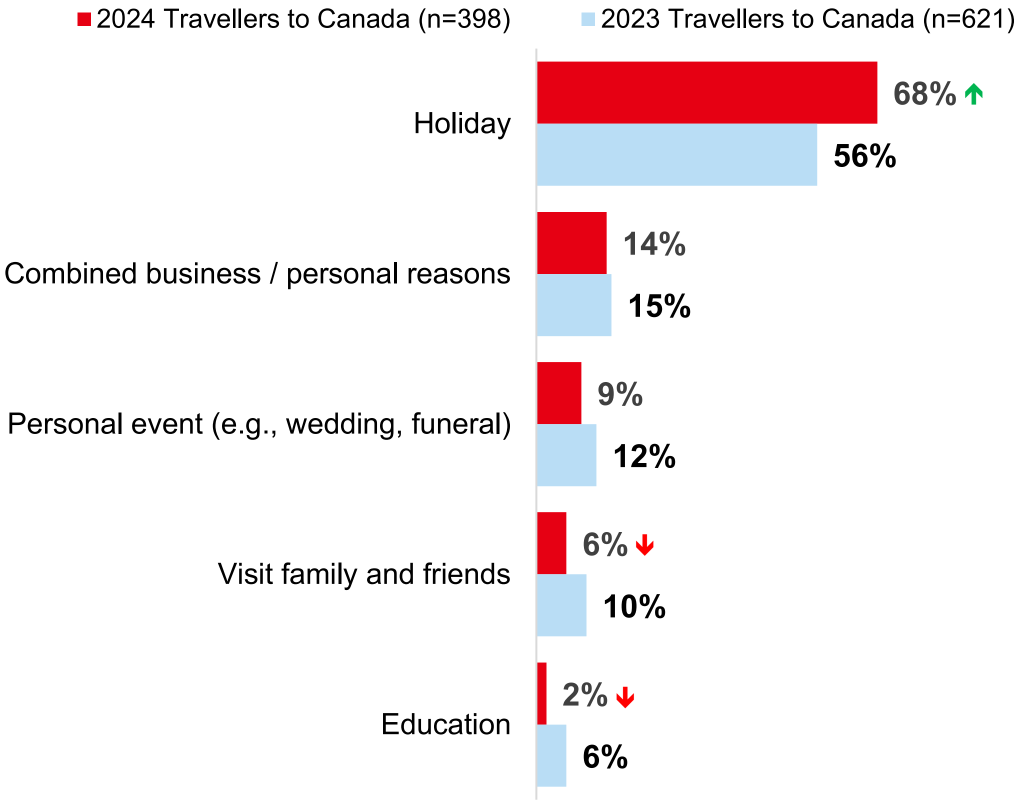
DESTINATION CANADA

MOST RECENT TRIP

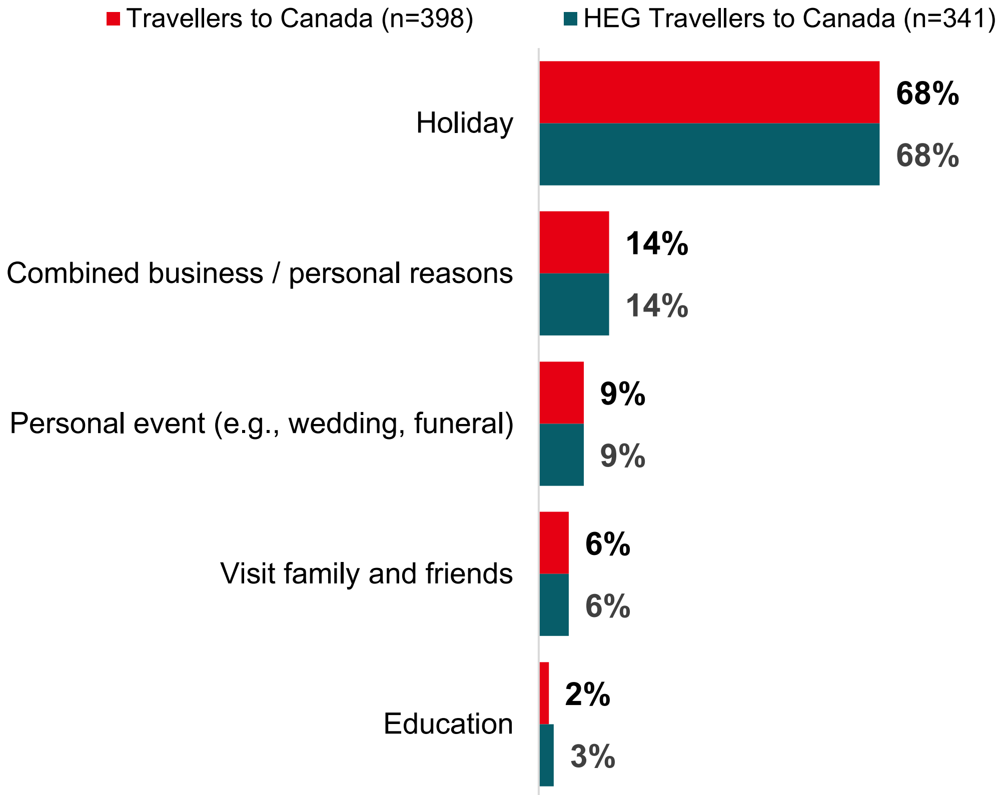
MAIN PURPOSE OF RECENT TRIP

Chinese travellers, including HEGs, showed increased visitation to Canada for holidays compared to last year.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



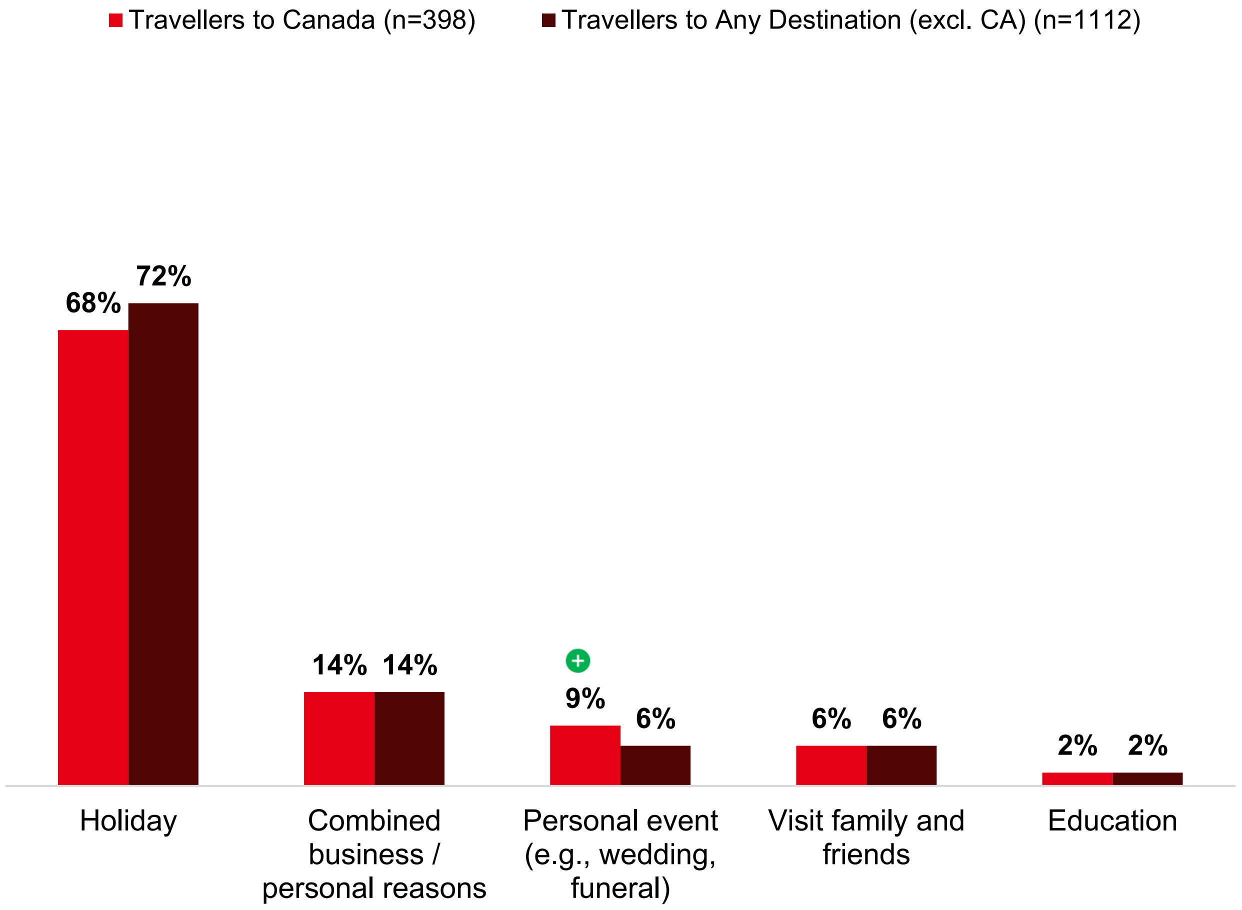
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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

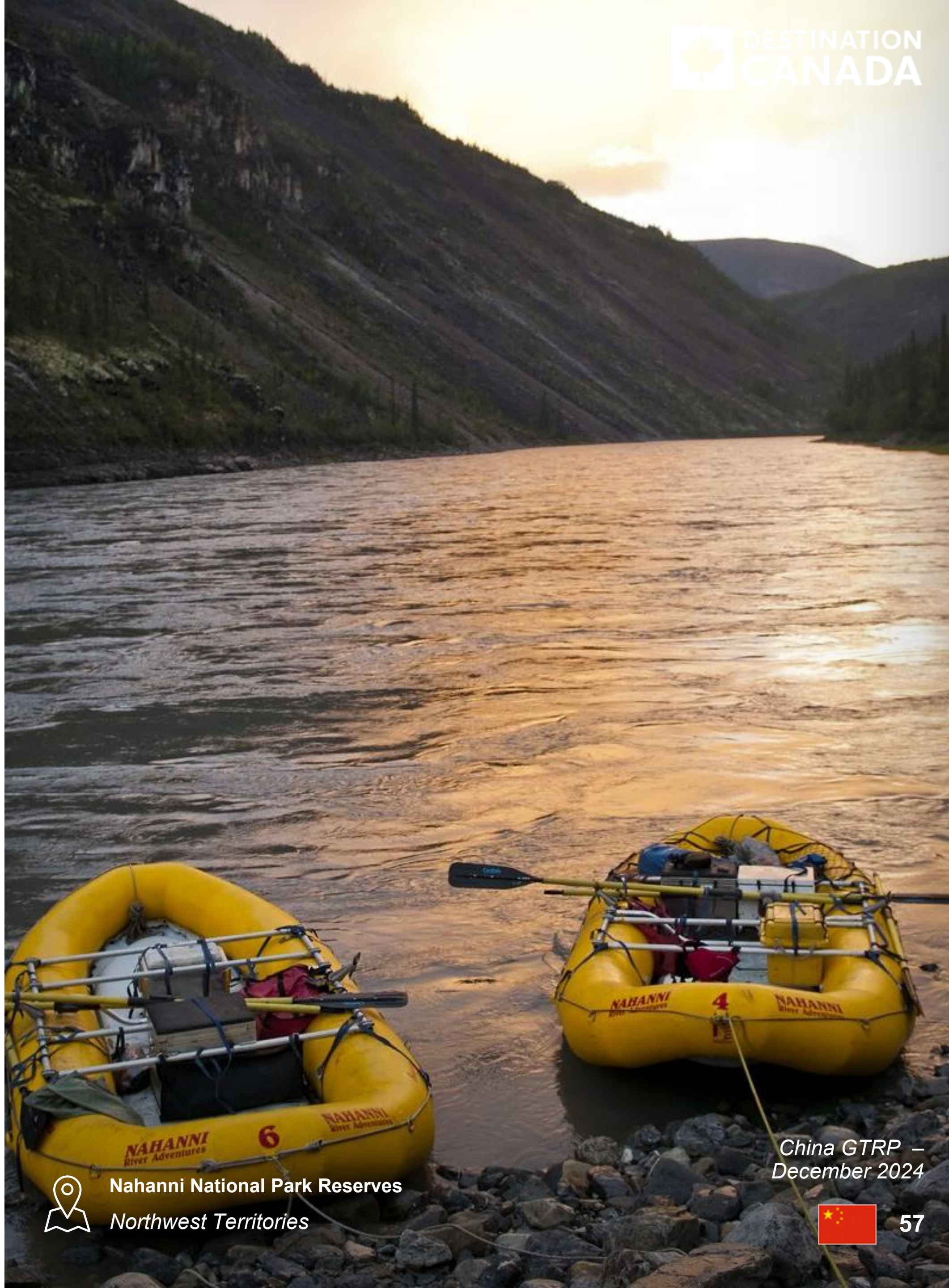
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F2. What was the main purpose of this trip? (Select one)

MAIN PURPOSE OF RECENT TRIP: BY DESTINATION

Holiday remains the main purpose of recent travels across destinations



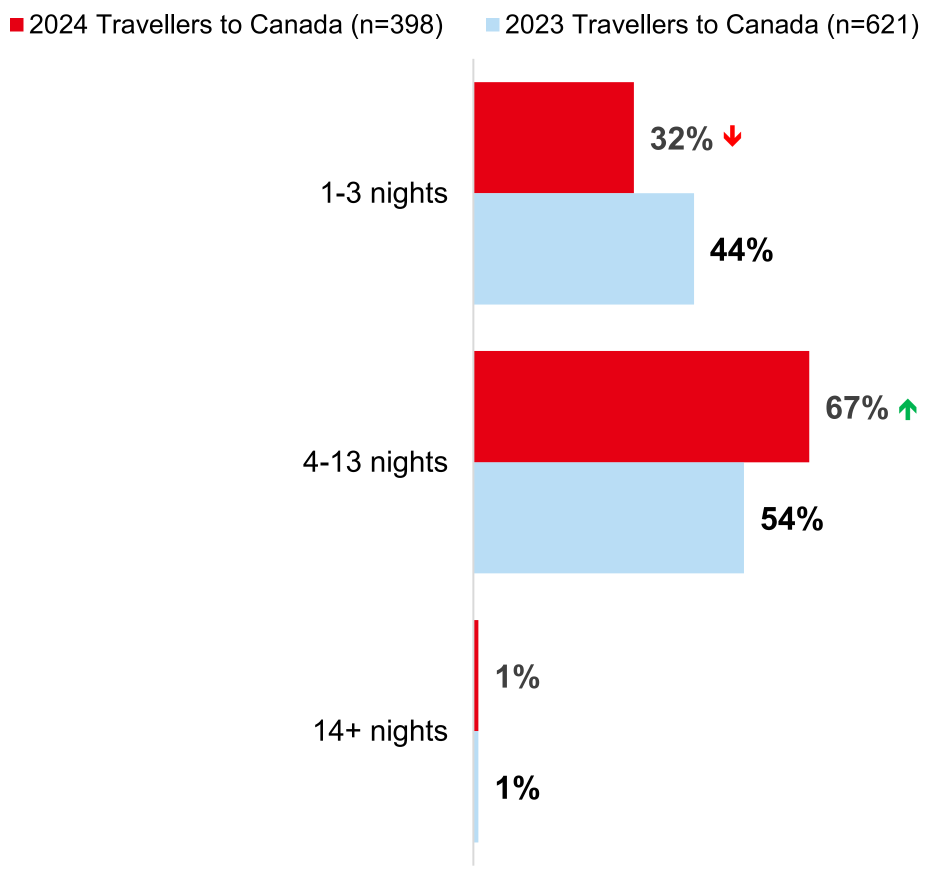
⊕ / ⊖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F2. What was the main purpose of this trip? (Select one)



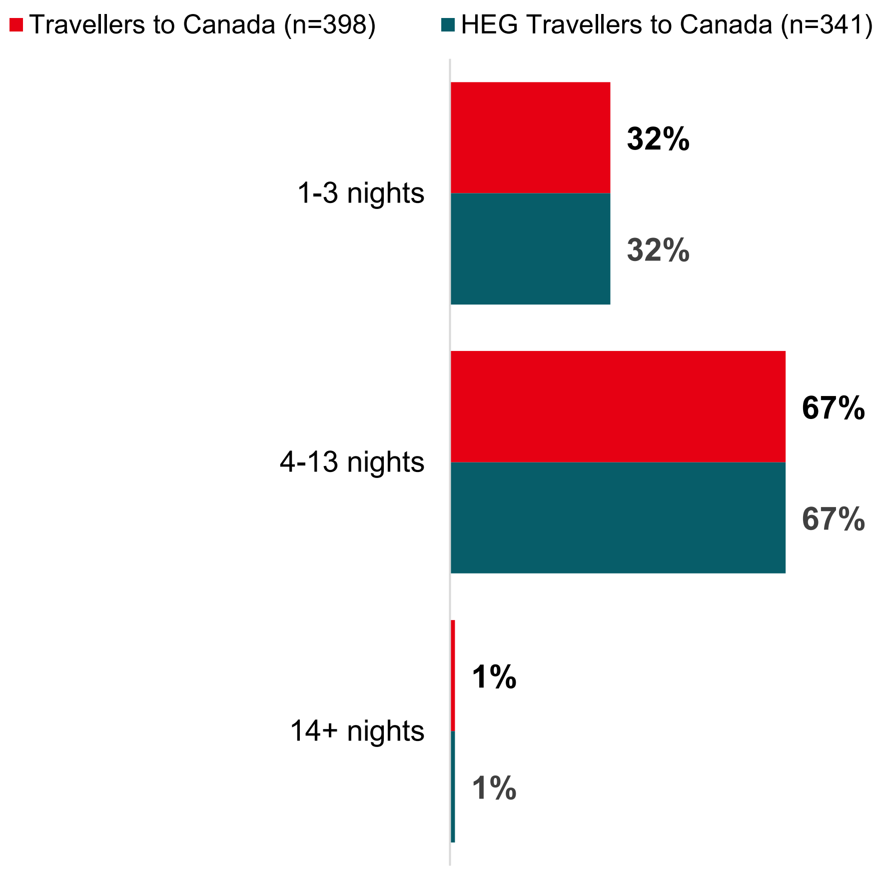
NIGHTS SPENT DURING RECENT TRIP

Majority of travellers spent 4-13 nights in Canada, length of trip increasing compared to last year.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada

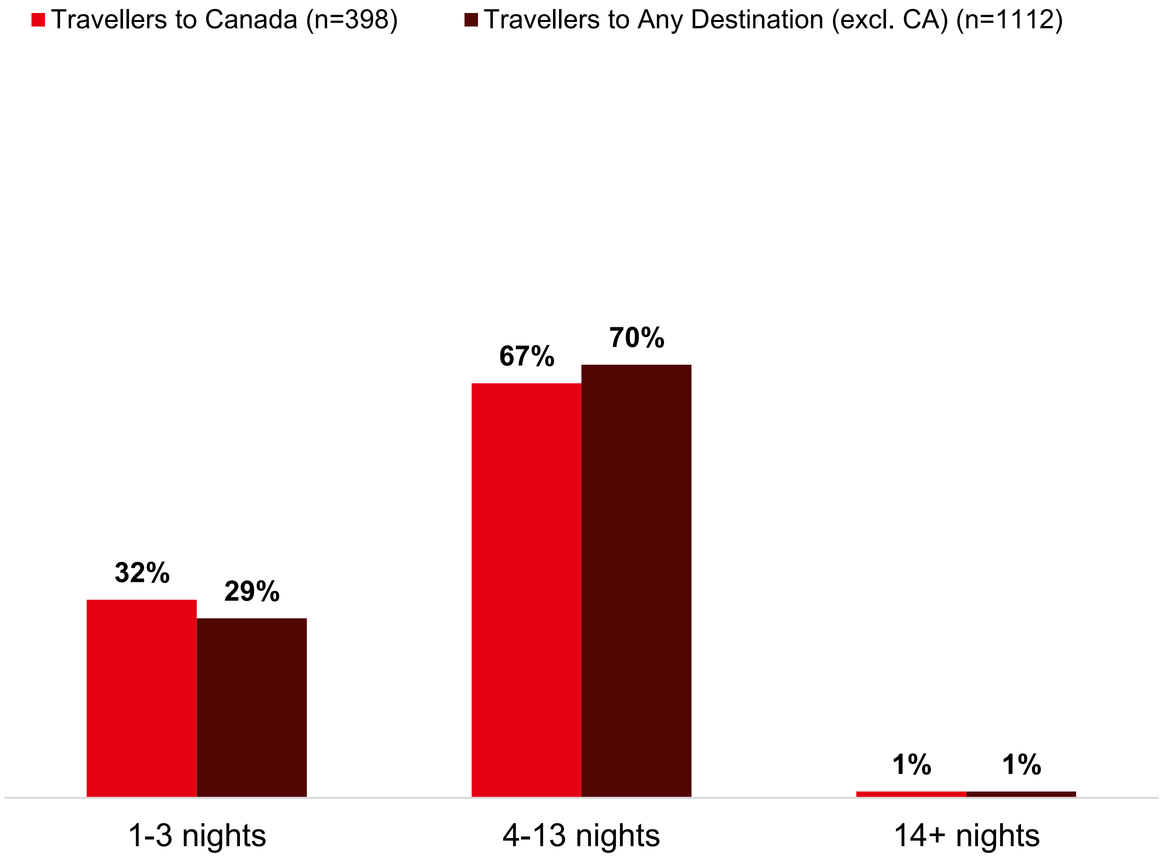


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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?

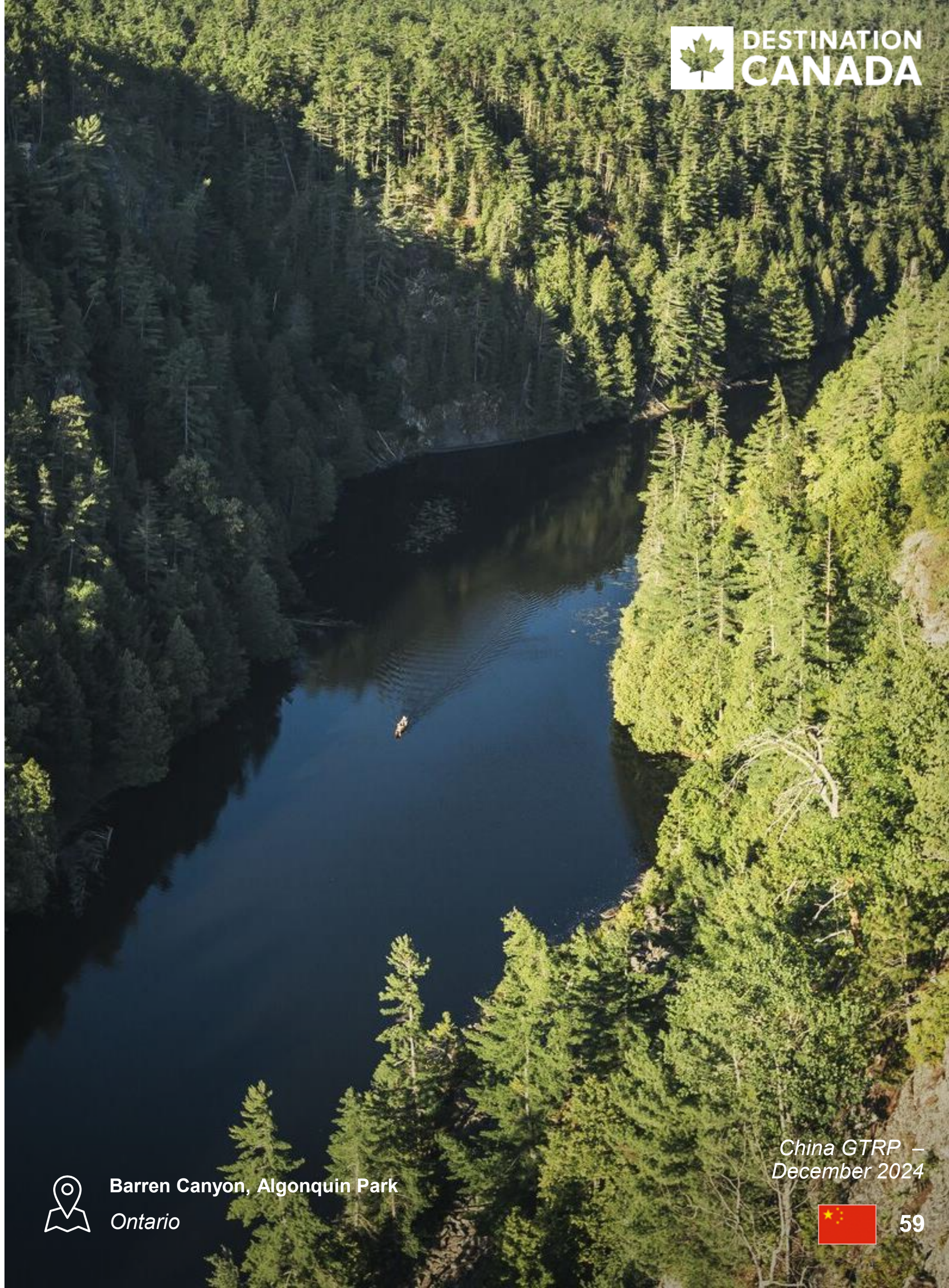
NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION

The length of stay was similar regardless of the destination, majority staying for 4-13 nights.



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

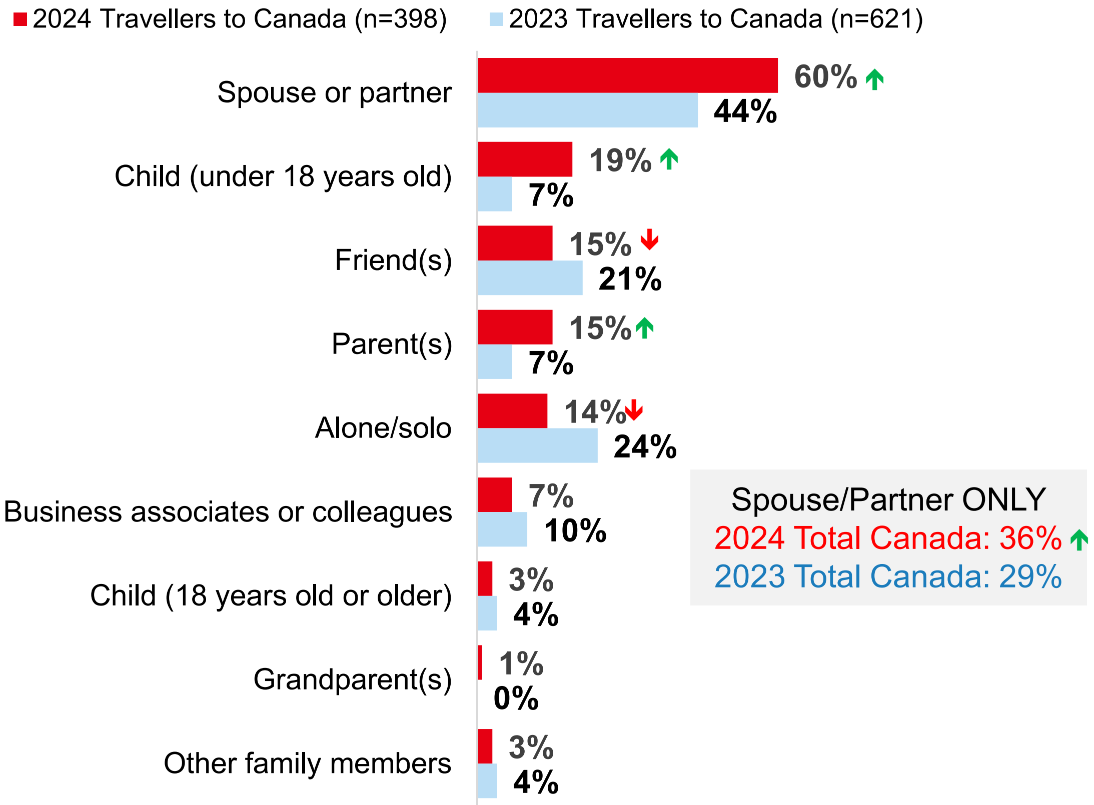
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F4. How many nights did you spend in this destination?



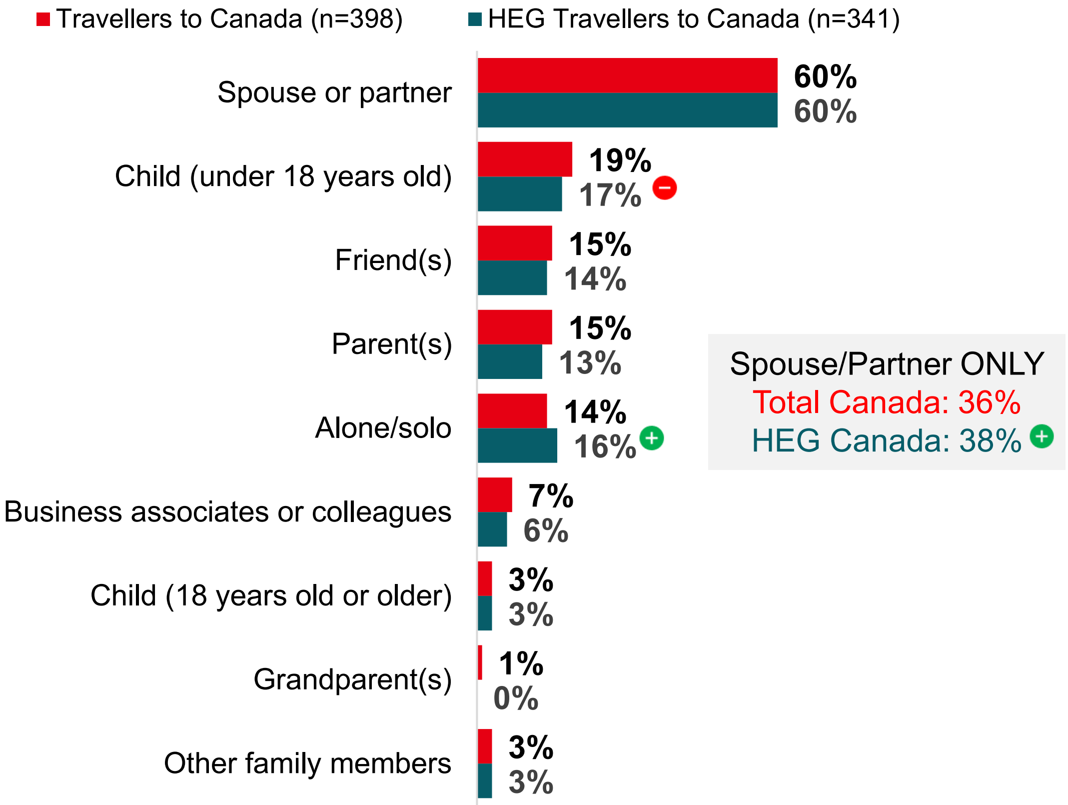
TRAVEL PARTY OF RECENT TRIP

Six in ten travellers to Canada were accompanied by a spouse or partner, increasing compared to last year along with travelling with children under 18 and with parents. HEGs were more likely to have travelled either with only a spouse or partner or alone, and less likely to travel with children under 18.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



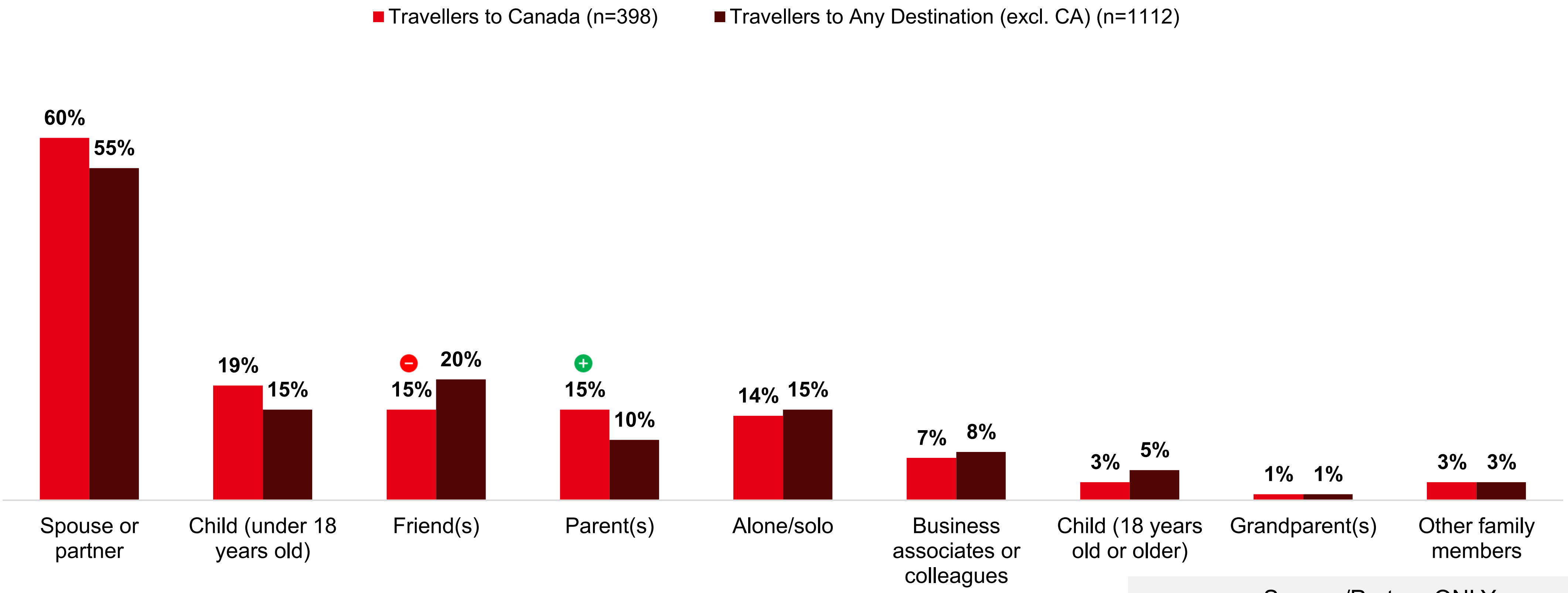
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = 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
F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL PARTY OF RECENT TRIP: BY DESTINATION

Travellers to any destination were most likely to have travelled with a spouse or partner. That said, travellers to Canada were more likely to travel with parents and less likely to travel with friends compared to travellers to other destinations.



Spouse/Partner ONLY
Travellers to Canada: 36%
Travellers to Any Destination (excl. CA): 34%

+ / − = 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

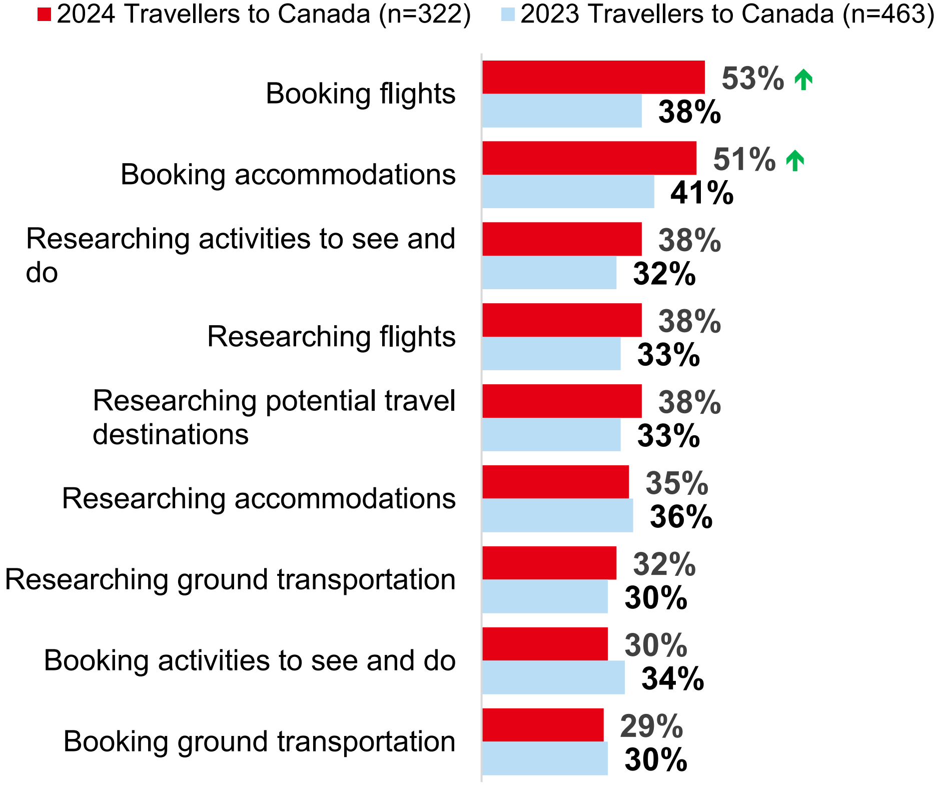
DESTINATION CANADA

Usage of travel agents or tour operators has increased compared to last year, as well as usage of travel agents to booking flights and accommodations. HEGs were less likely to use a travel agent or tour operator for booking flights or researching accommodations.

% Used a travel agent
2024 Total Canada: 81%↑
2023 Total Canada: 75%

Total Travellers to Canada: Trended

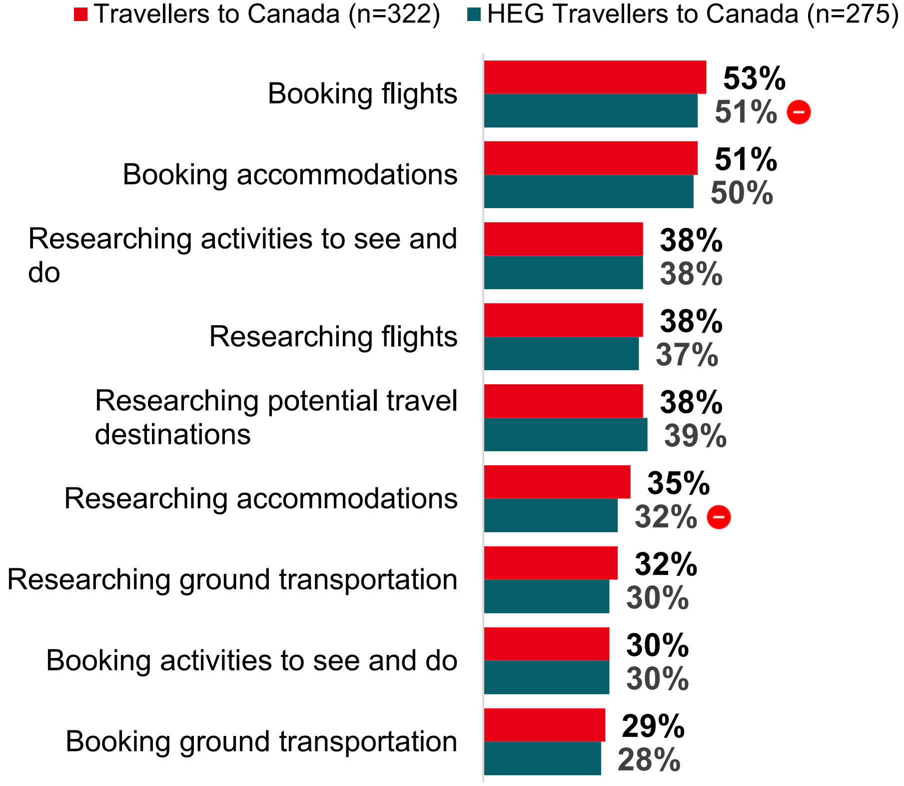
Among those who used a travel agent/tour operator



% Used a travel agent
Total Canada: 81%
HEG Canada: 81%

Total Travellers to Canada vs. HEG Travellers to Canada

Among those who used a travel agent/tour operator



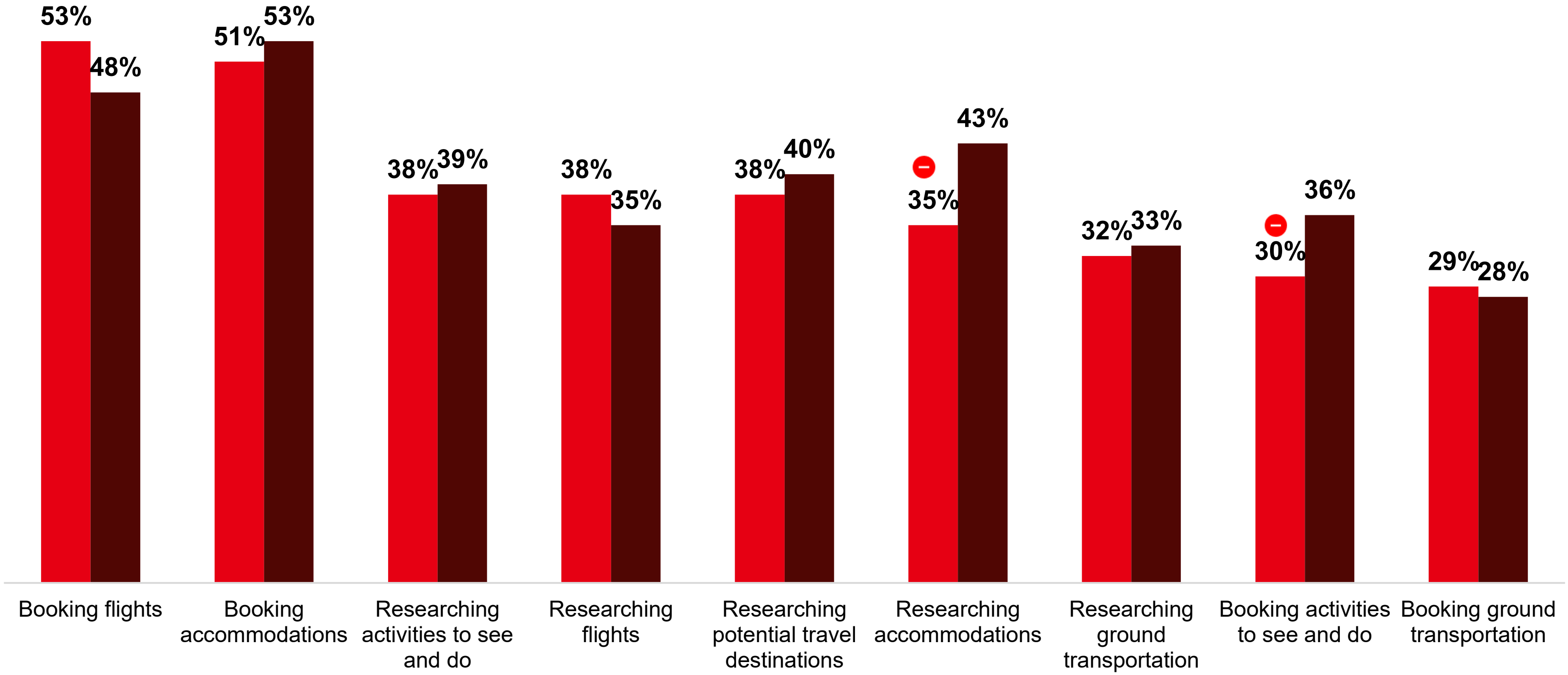
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include CITS, CYTS, or Utour, they do not include online booking engines like Ctrip, Qunar, Fliggy or TUNIU. 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?

↑ / ↓ = 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)

Travel agents or tour operators were used more frequently by travellers to Canada compared to other destinations. That said, travellers to Canada were less likely to have used a travel agent or tour operator to research accommodations or book activities.

% Used a travel agent
Travellers to Canada: 81% (+)
Travellers to Any Destination (excl. CA): 65%



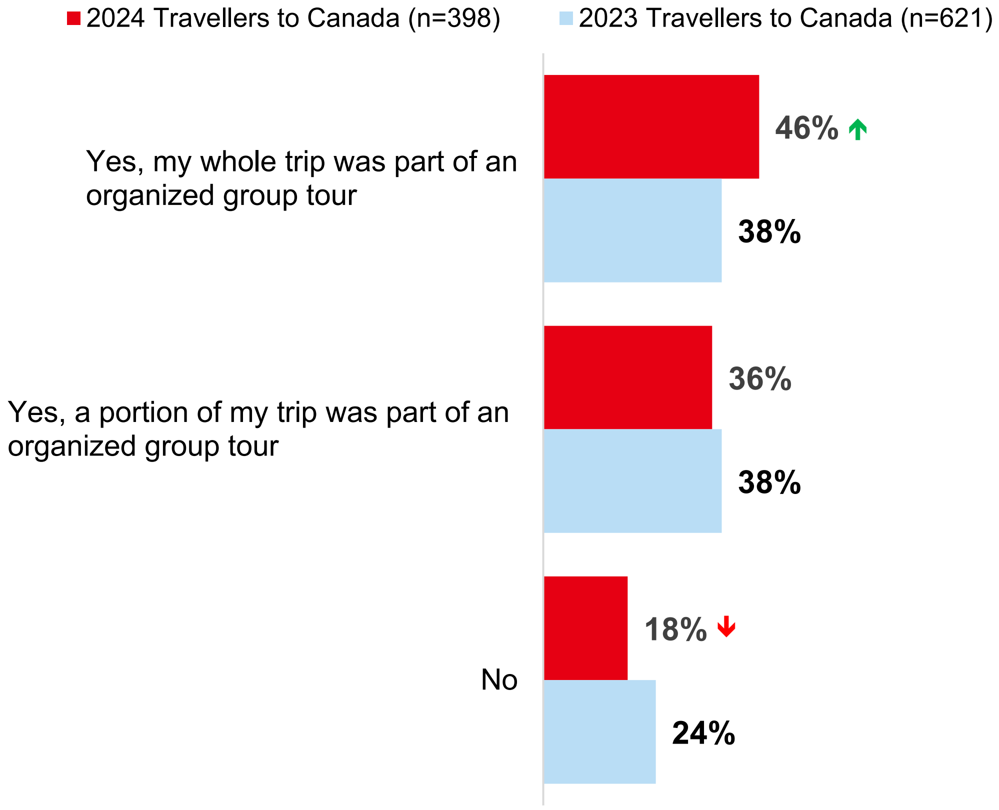
(+) / (−) = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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 CITS, CYTS, or Utour, they do not include online booking engines like Ctrip, Qunar, Fliggy or TUNIU. 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?

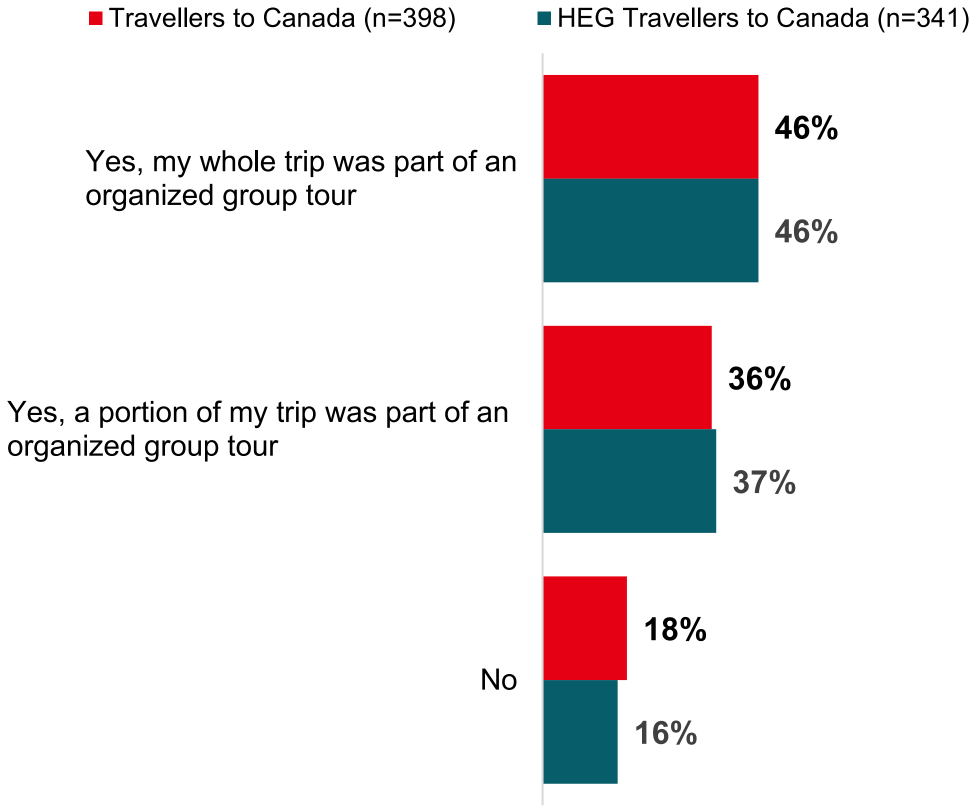
ORGANIZED GROUP TOUR USAGE FOR RECENT TRIP

Overall usage of organized group tours has increased compared to last year, with usage for their whole trip also increasing.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



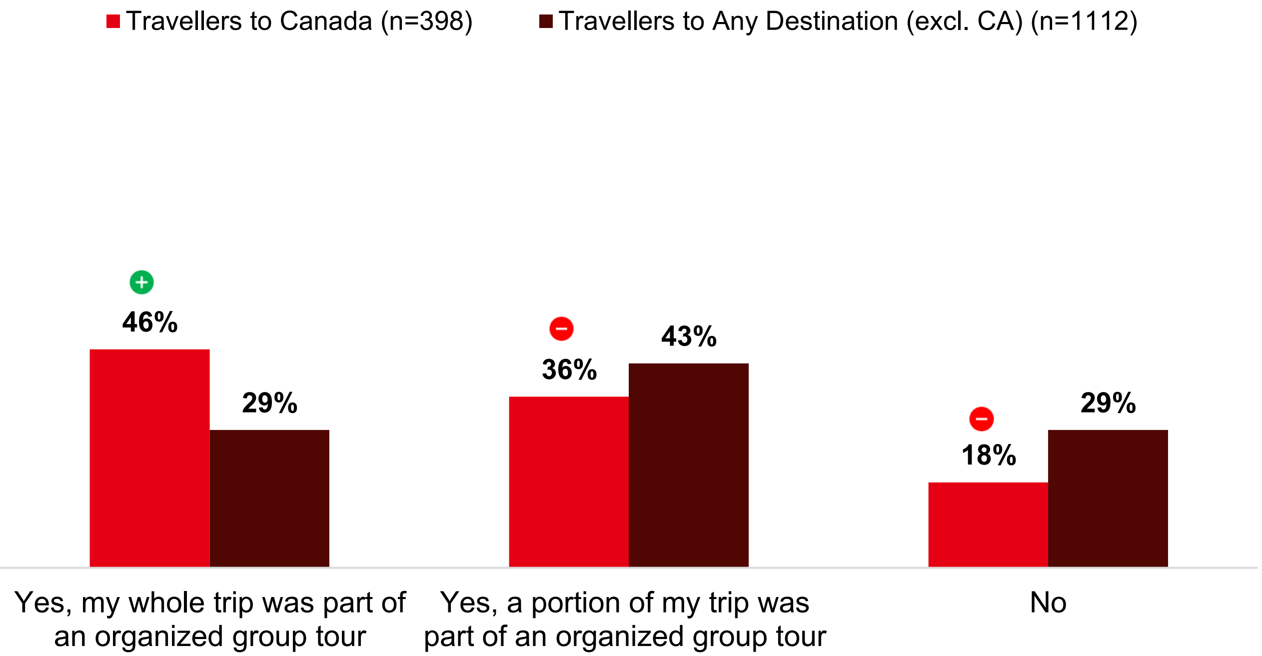
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = 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
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?

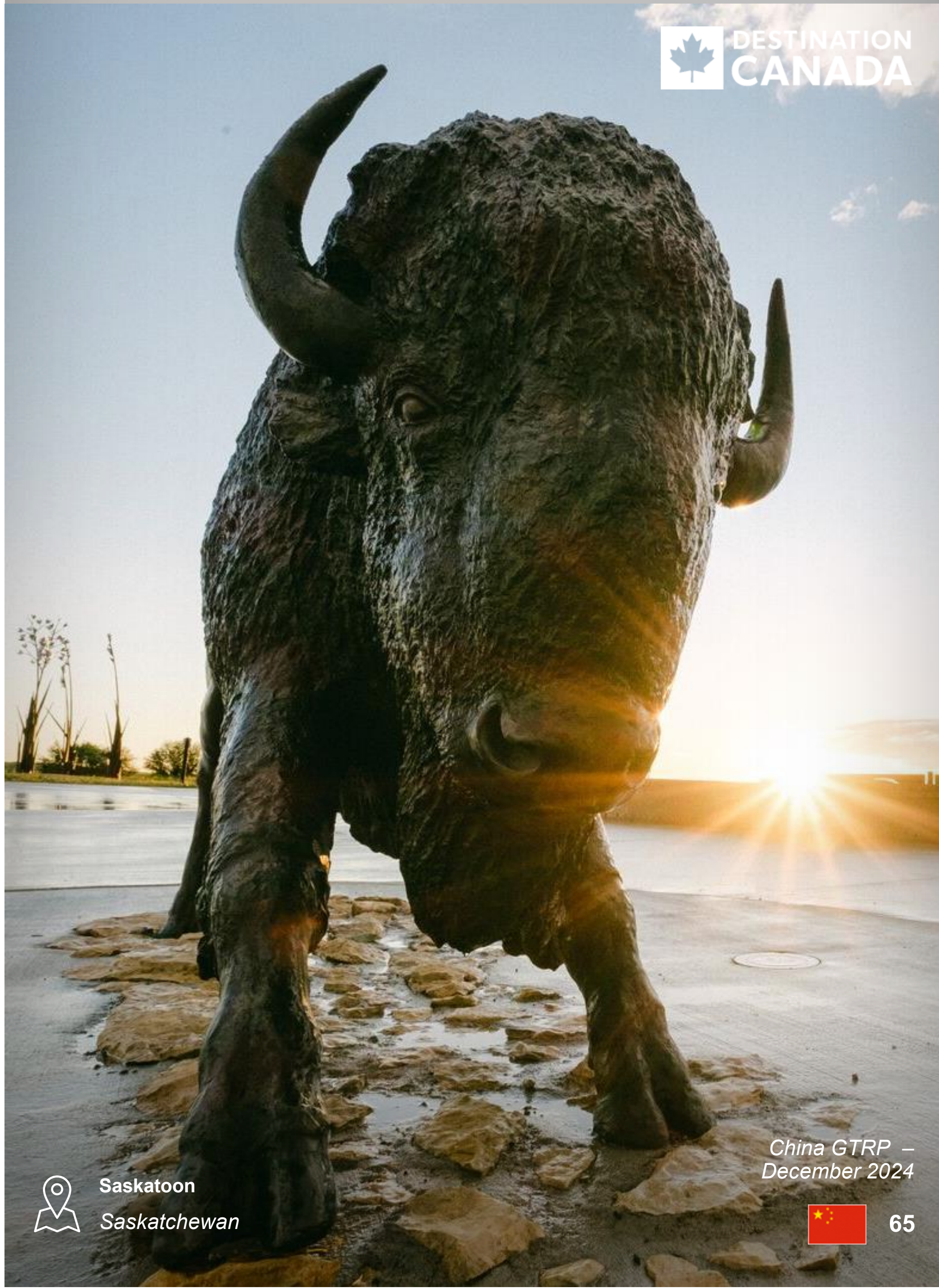
ORGANIZED GROUP TOUR FOR RECENT TRIP: BY DESTINATION

Travellers to Canada were more likely than travellers to other destinations to have used an organized group tour for their entire recent trip.



+ / − = 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
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?

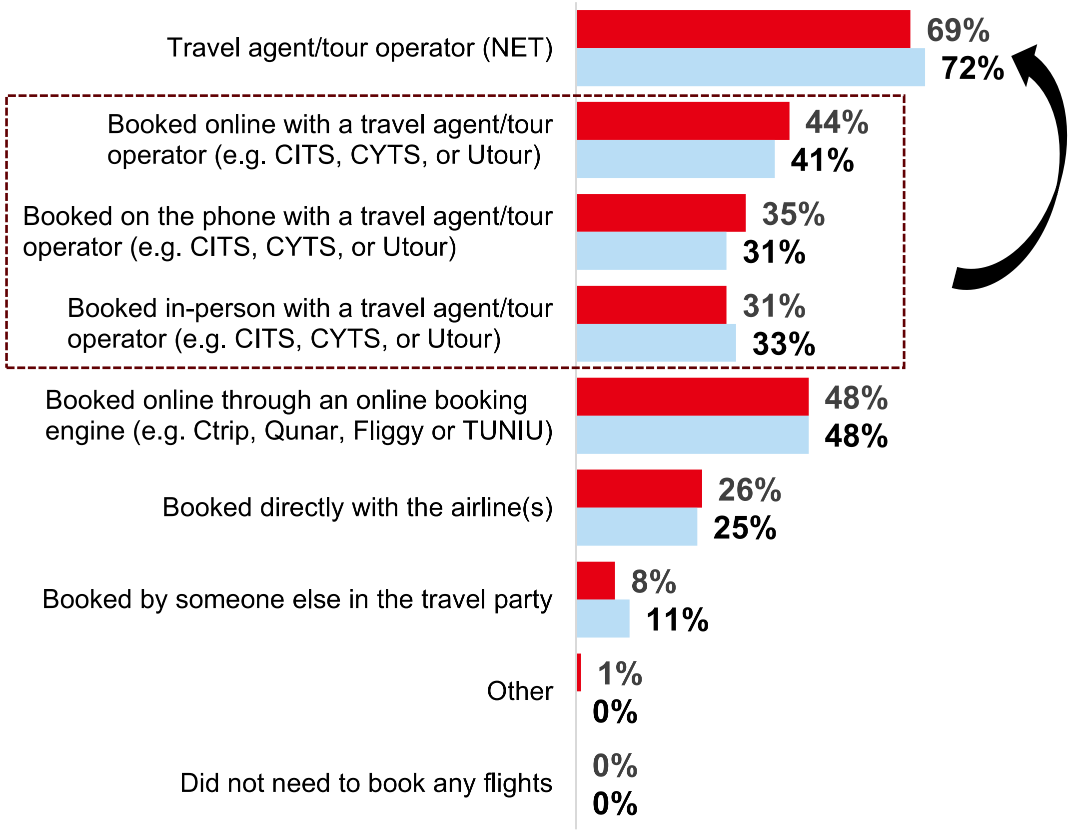


BOOKING FLIGHTS FOR RECENT TRIP

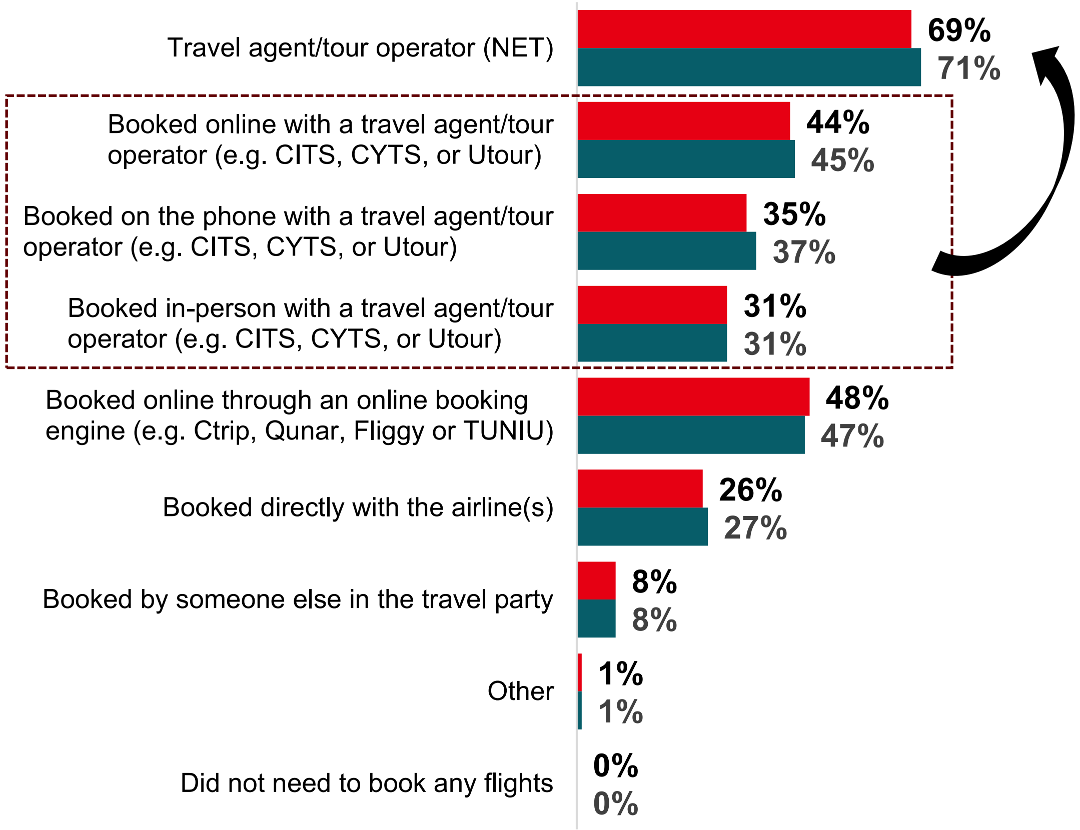
DESTINATION CANADA

Using a travel agent or tour operator remains the most popular method for booking flights, and this is similar among HEGs.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



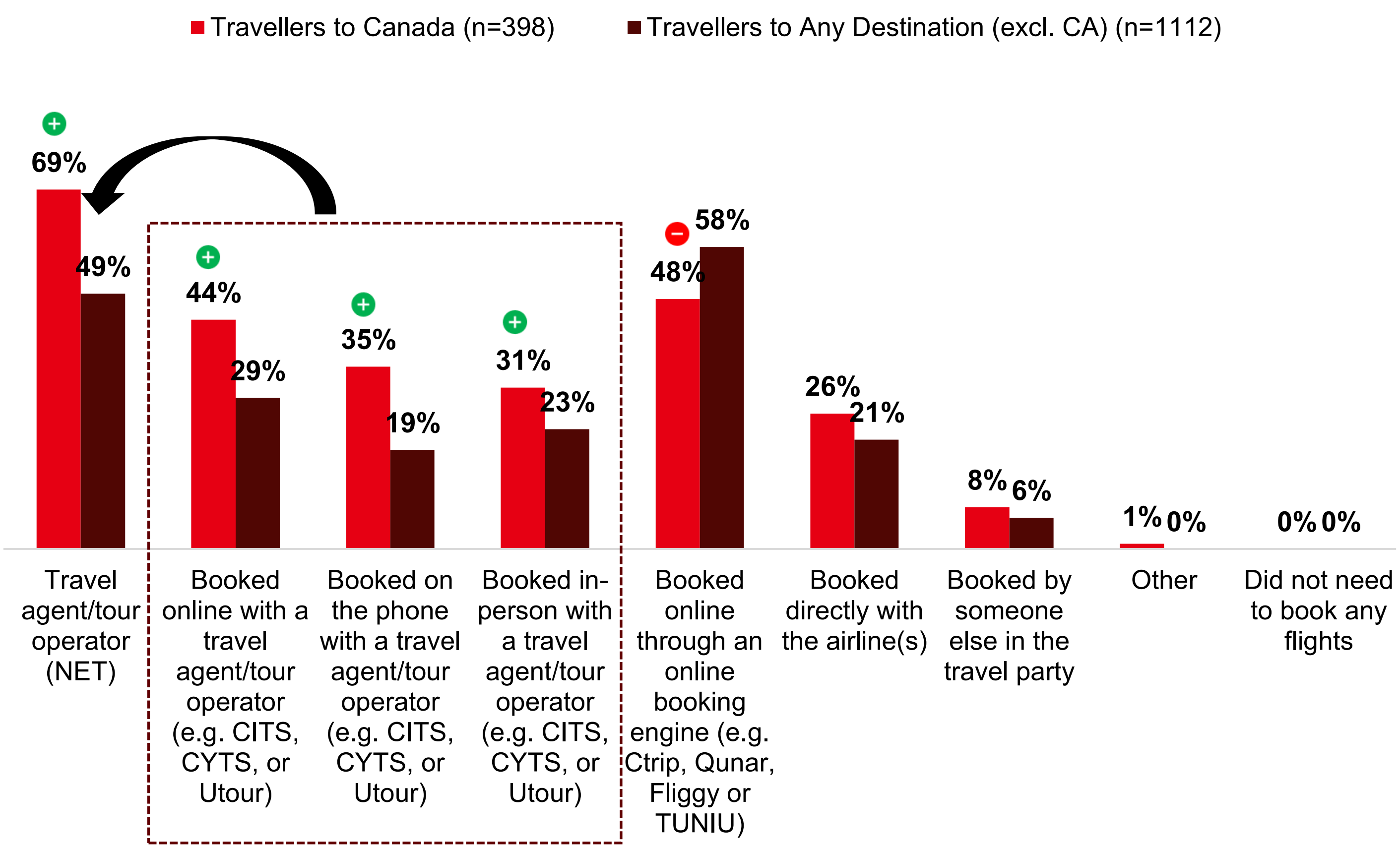
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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

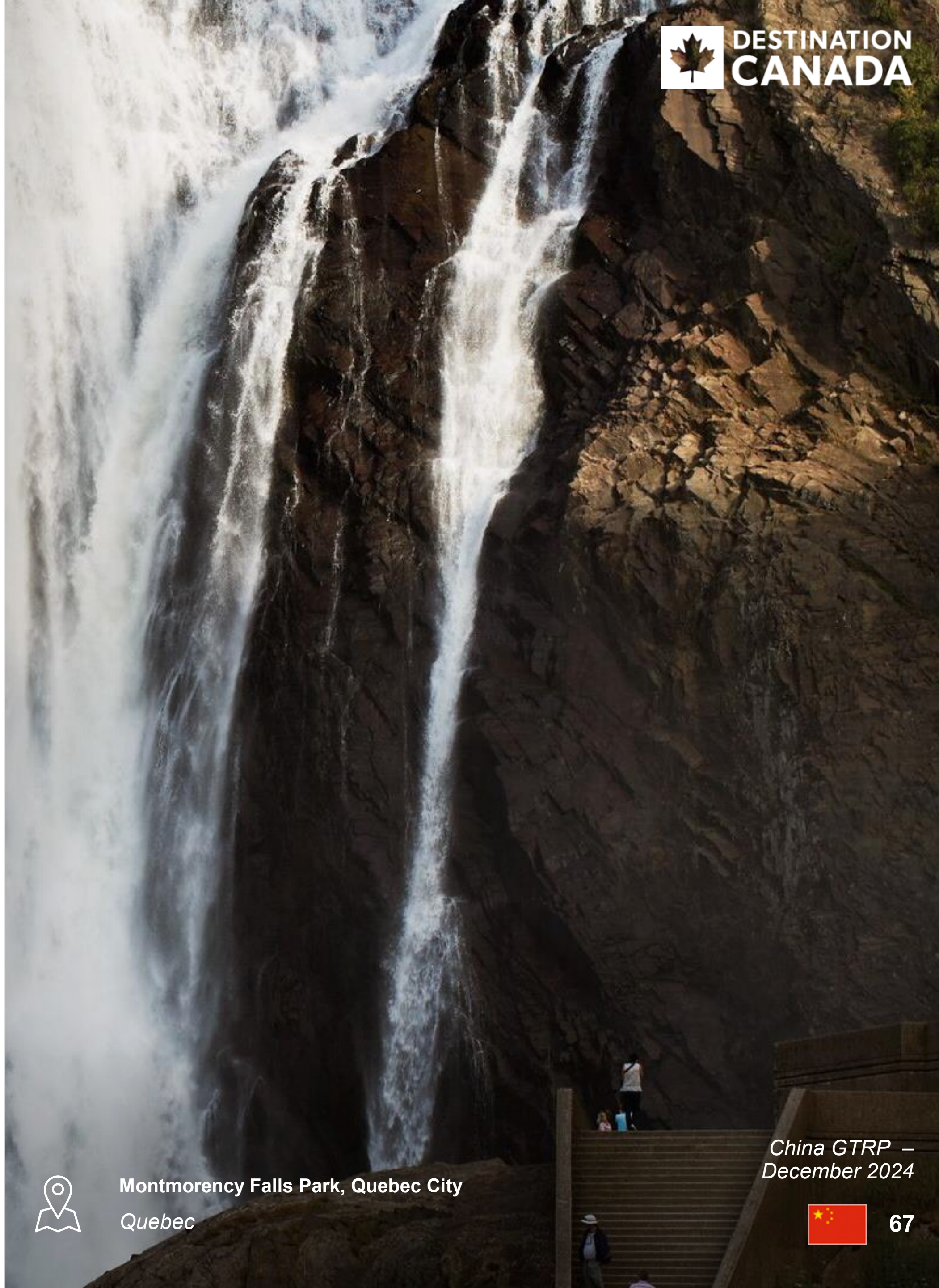
BOOKING FLIGHTS FOR RECENT TRIP: BY DESTINATION

Travellers to Canada are more likely to book flights with a travel agent or tour operator and less likely to book through an online booking engine compared to 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
F12. How did you book your flight for this trip? (Select all that apply)



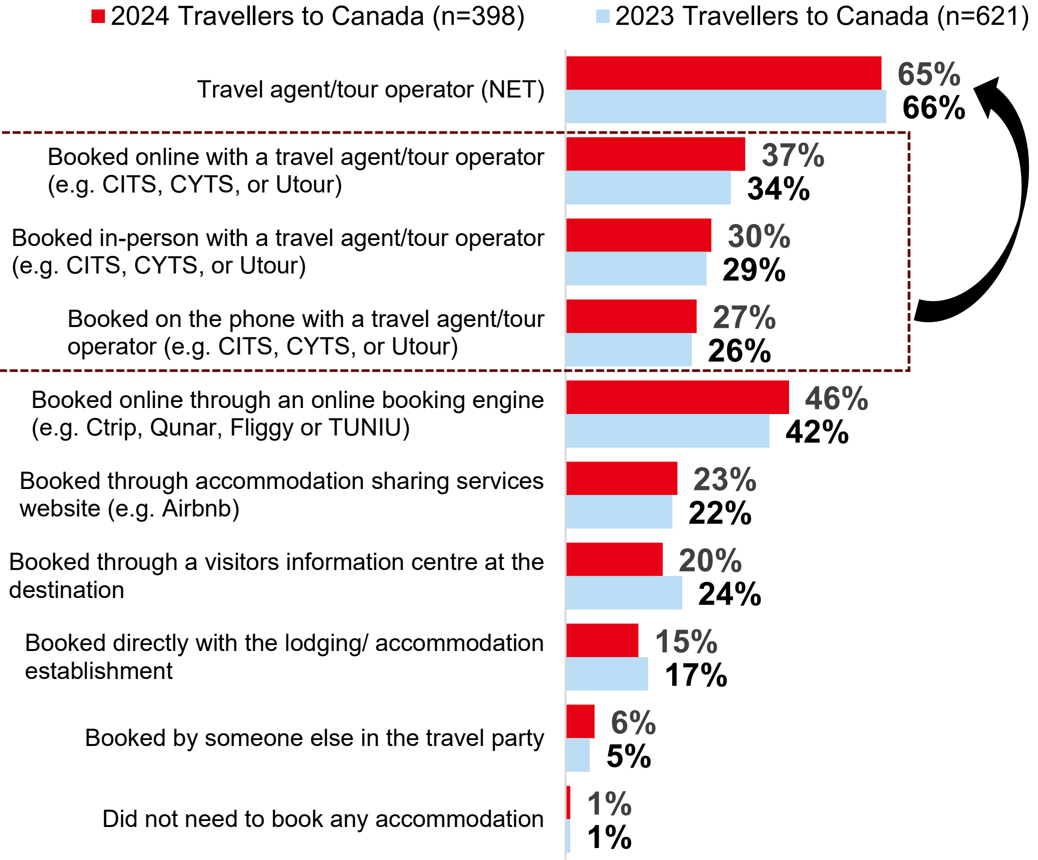
Montmorency Falls Park, Quebec City
Quebec

BOOKING ACCOMMODATIONS FOR RECENT TRIP

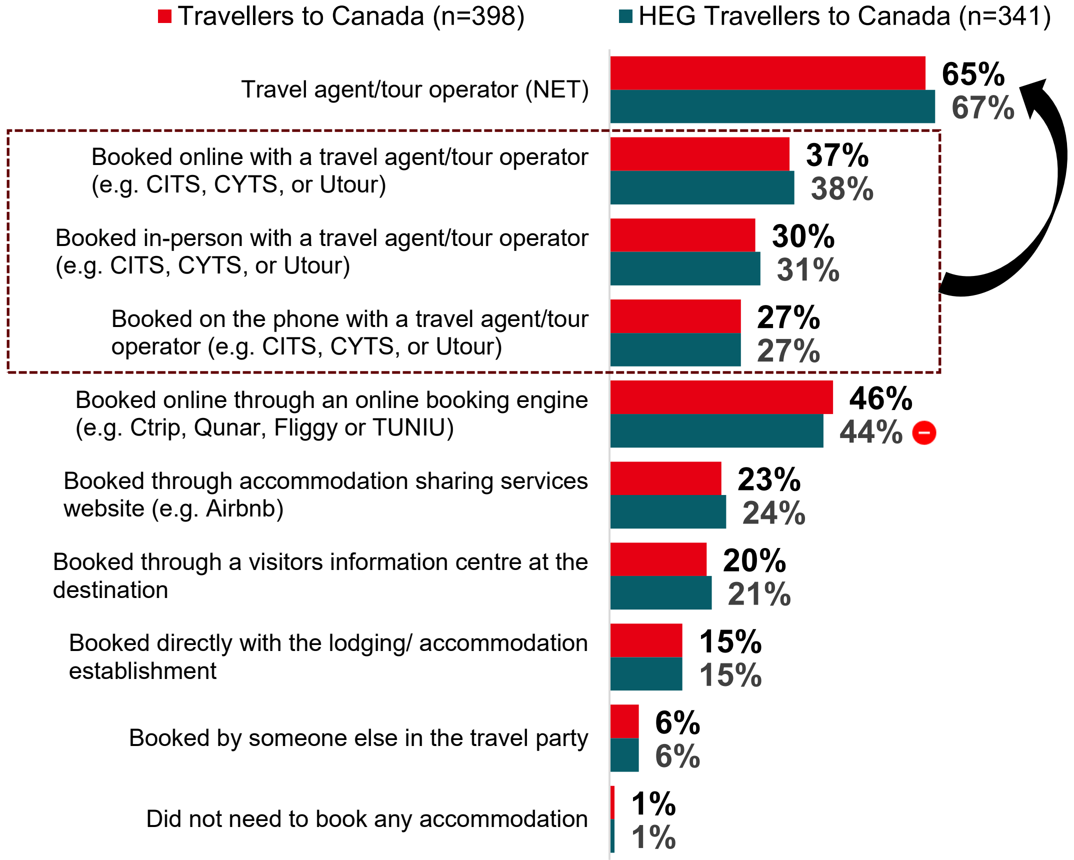
DESTINATION CANADA

Similar to flights, travellers to Canada were most likely to use a travel agent or tour operator to book accommodations. Of note, HEGs are less likely to book through an online booking engines.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



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

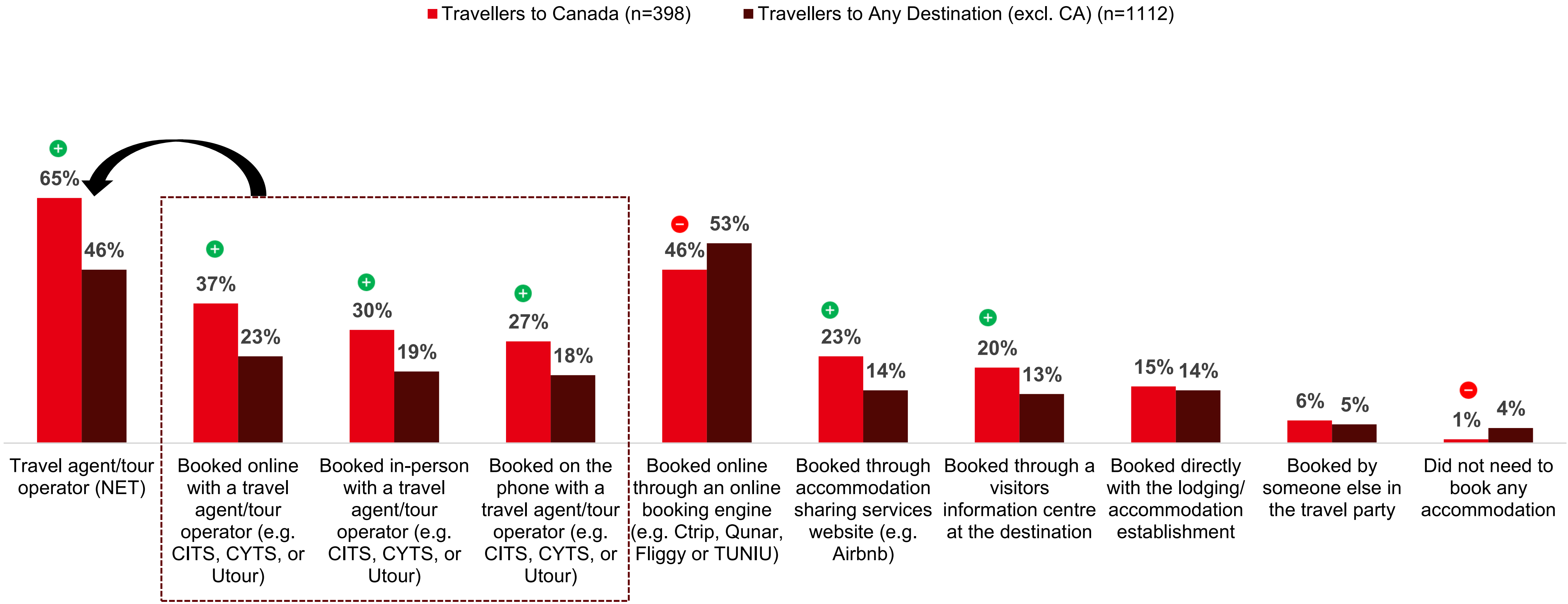
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

BOOKING ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

DESTINATION CANADA

Travellers to Canada are more likely to book accommodations via a travel agent or tour operator, through accommodation sharing services, or through a visitors information centre, while travellers to other destinations are more likely to book through an online booking engine.



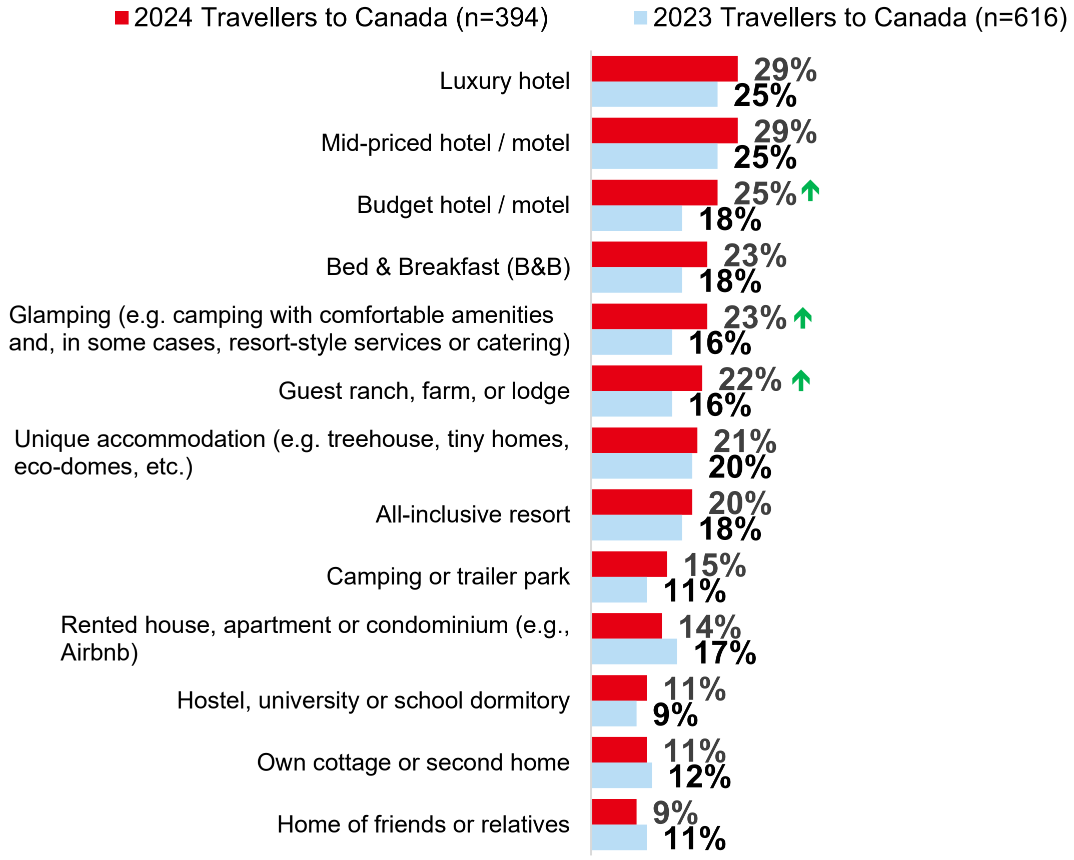
+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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)

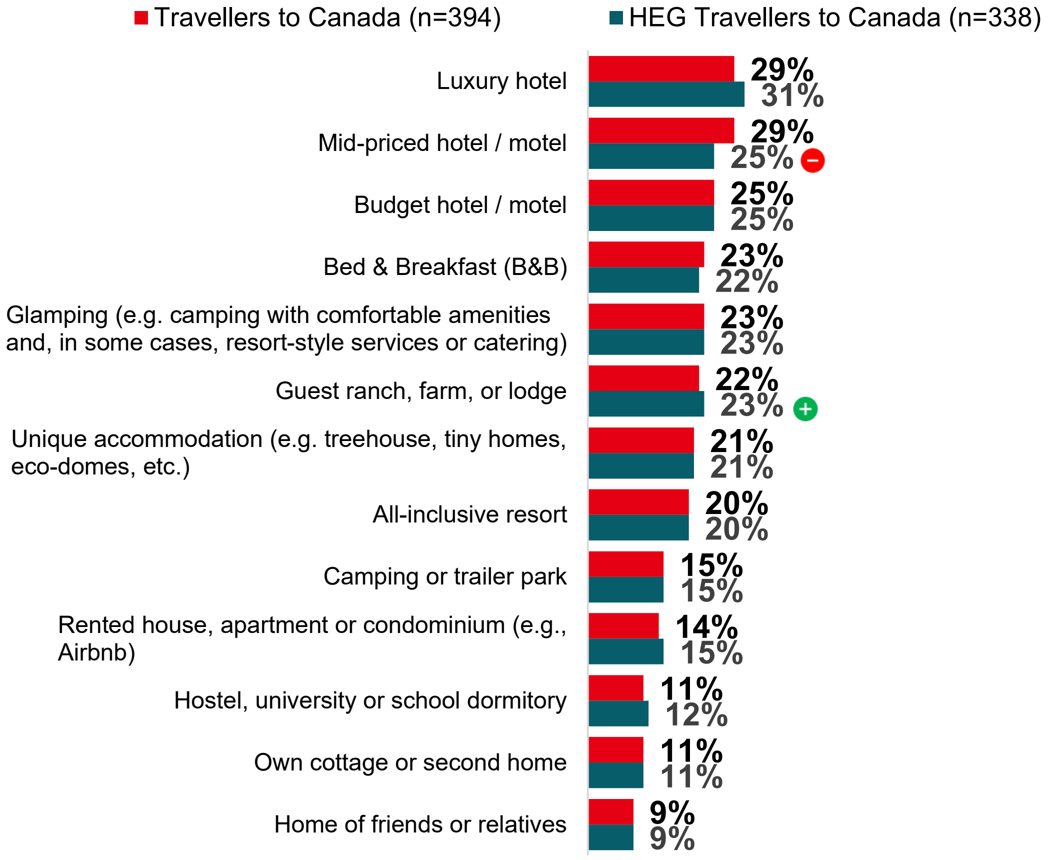
TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Stays at luxury and mid-priced hotel/motels remain the most popular type of accommodations for travellers to Canada and among HEGs, although stays at mid-priced hotel/motels are less popular.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



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

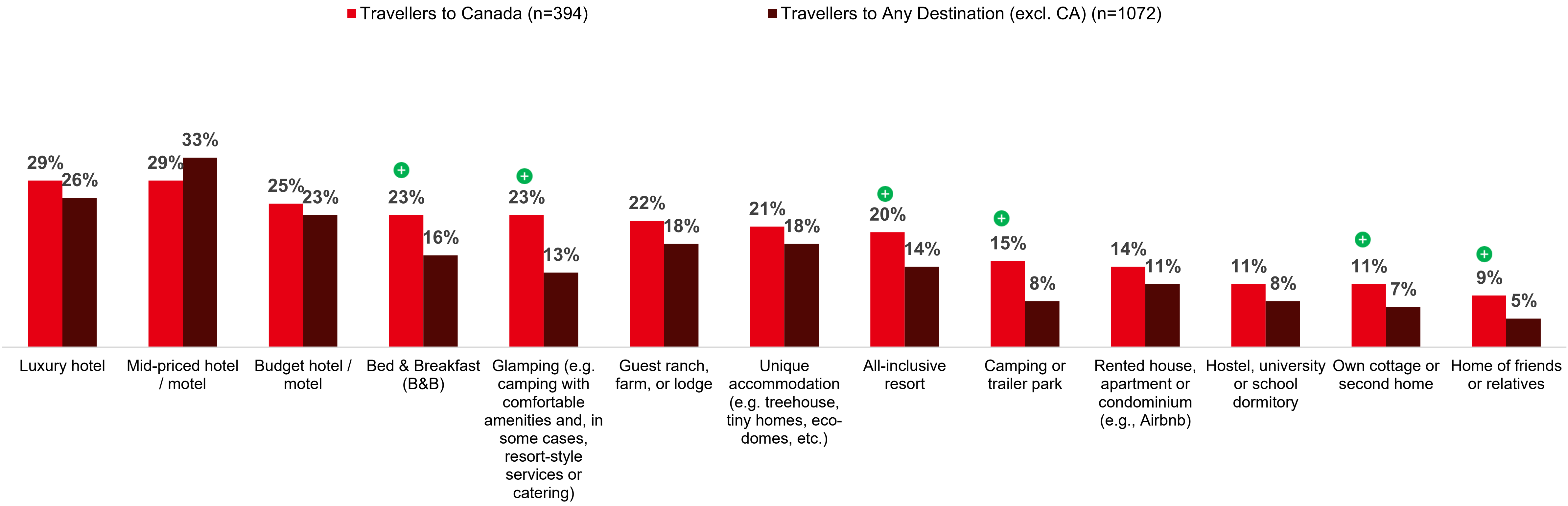
⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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

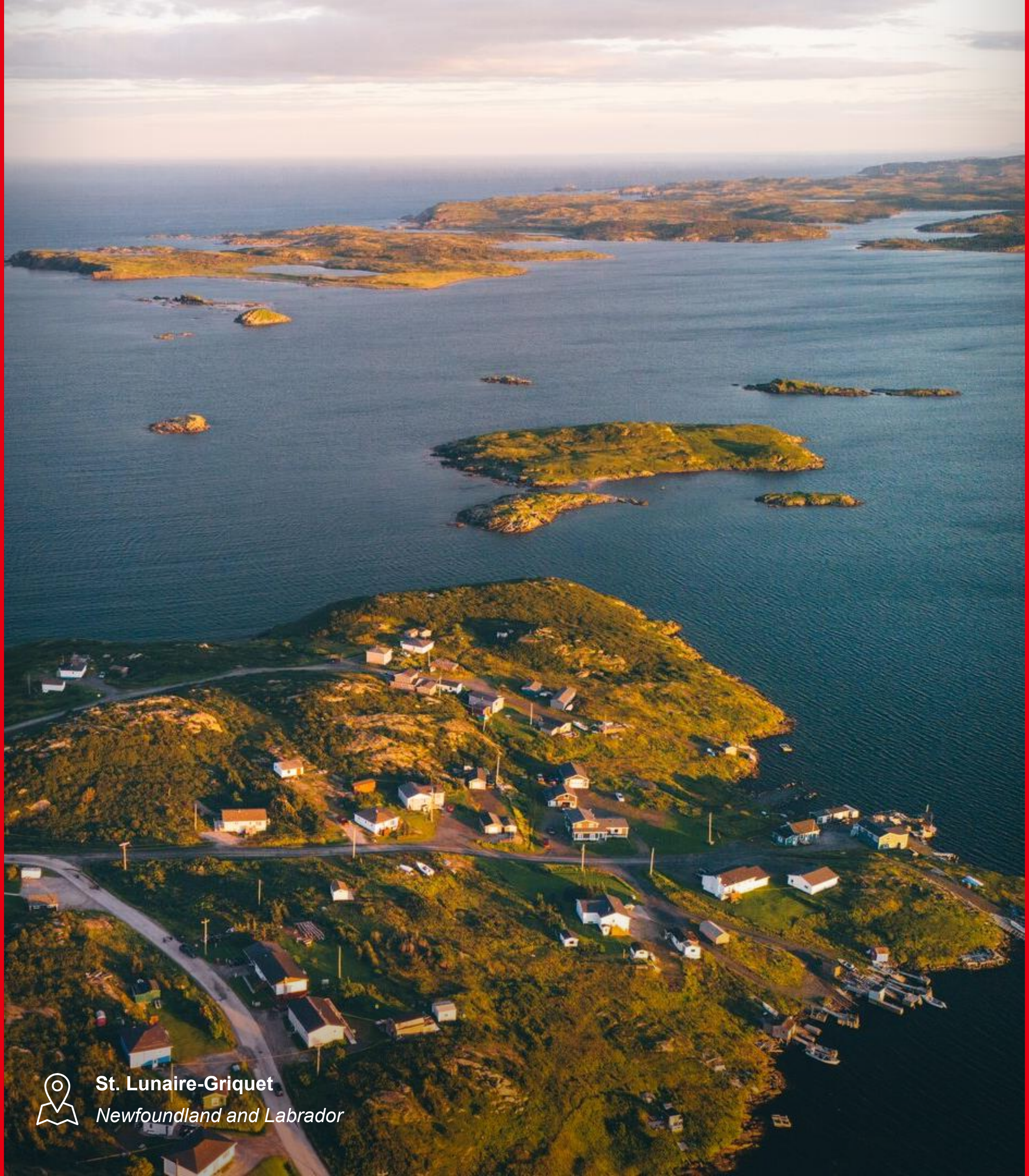
DESTINATION CANADA

Mid-priced hotels/motels were the most popular accommodations for travellers to other destinations, while travellers to Canada were more likely to stay at different types of accommodations.



+ / − = 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, Booked Accommodations
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

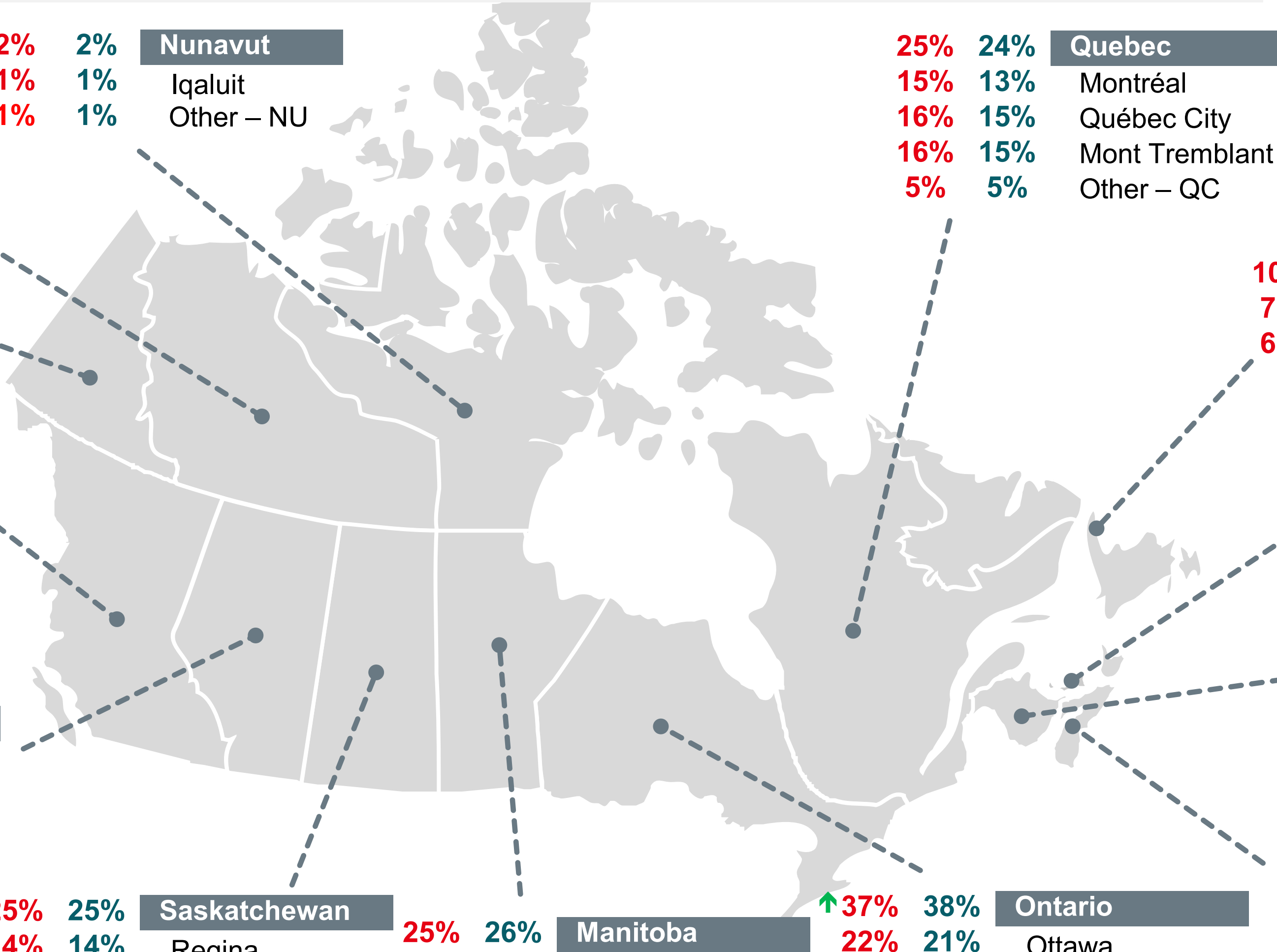


RECENT TRIP TO CANADA

CANADIAN DESTINATIONS VISITED DURING RECENT TRIP

Chinese travellers were most likely to have visited Ontario and BC on their most recent trip, with visits for both increasing compared to last year.

Total Travellers | **Total HEG Travellers**



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

Total	HEG	Nunavut
2%	2%	**Nunavut**
1%	1%	Iqaluit
1%	1%	Other – NU

Total	HEG	Quebec
25%	24%	**Quebec**
15%	13%	Montréal
16%	15%	Québec City
16%	15%	Mont Tremblant
5%	5%	Other – QC

Total	HEG	Yukon
5%	6%	**Yukon**
4%	4%	Whitehorse
3%	3%	Dawson City
2%	1%	Other – YT

Total	HEG	Newfoundland & Labrador
10%	10%	**Newfoundland & Labrador**
7%	6%	St. John's
6%	6%	Other - NL

Total	HEG	British Columbia
↑30%	26% −	**British Columbia**
19%	16% −	Rocky Mountains
23%	20% −	Vancouver
17%	15% −	Victoria
6%	5%	Whistler
9%	9%	Okanagan
3%	4%	Other – BC

Total	HEG	Prince Edward Island
14%	15%	**Prince Edward Island**
8%	9%	Charlottetown
9%	9%	Other - PEI

Total	HEG	New Brunswick
13%	13%	**New Brunswick**
8%	8%	Fredericton
8%	8%	Saint John
6%	6%	Other - NB

Total	HEG	Alberta
24%	23%	**Alberta**
14%	14%	Rocky Mountains
13%	13%	Calgary
13%	12%	Edmonton
9%	8%	Banff
10%	10%	Jasper
2%	2%	Other – AB

Total	HEG	Saskatchewan
25%	25%	**Saskatchewan**
14%	14%	Regina
16%	16%	Saskatoon
12%	12%	Other – SK

Total	HEG	Manitoba
25%	26%	**Manitoba**
18%	18%	Winnipeg
17%	18%	Churchill
11%	10%	Other – MB

Total	HEG	Ontario
↑37%	38%	**Ontario**
22%	21%	Ottawa
25%	24%	Niagara Falls
21%	21%	Toronto
9%	9%	Muskoka
4%	4%	Other – ON

Total	HEG	Nova Scotia
11%	11%	**Nova Scotia**
7%	7%	Halifax
6%	6%	Cape Breton
5%	5%	Other - NS

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=398); HEG (n=341)
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

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

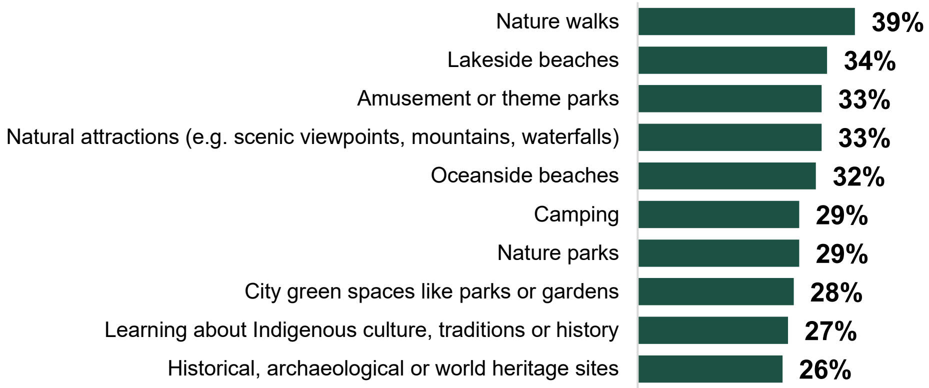
	Canadian Cities Visited on Most Recent Trip				
	Vancouver *(n=179)*	**Calgary** *(n=105)*	**Toronto** *(n=159)*	**Montreal** *(n=138)*	**Halifax** *(n=81)*
British Columbia	*100%*	21%	38%	17%	14%
Alberta	19%	*100%*	20%	25%	25%
Saskatchewan	12%	28%	18%	28%	26%
Manitoba	12%	33%	18%	27%	20%
Ontario	39%	31%	*100%*	38%	28%
Quebec	15%	37%	25%	*100%*	25%
New Brunswick	5%	14%	10%	13%	15%
Nova Scotia	6%	18%	11%	12%	*100%*
Prince Edward Island	13%	11%	11%	12%	14%
Newfoundland & Labrador	8%	11%	11%	9%	15%
Yukon	3%	4%	4%	5%	9%
Northwest Territories	2%	3%	3%	1%	2%
Nunavut	3%	2%	1%	1%	2%

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

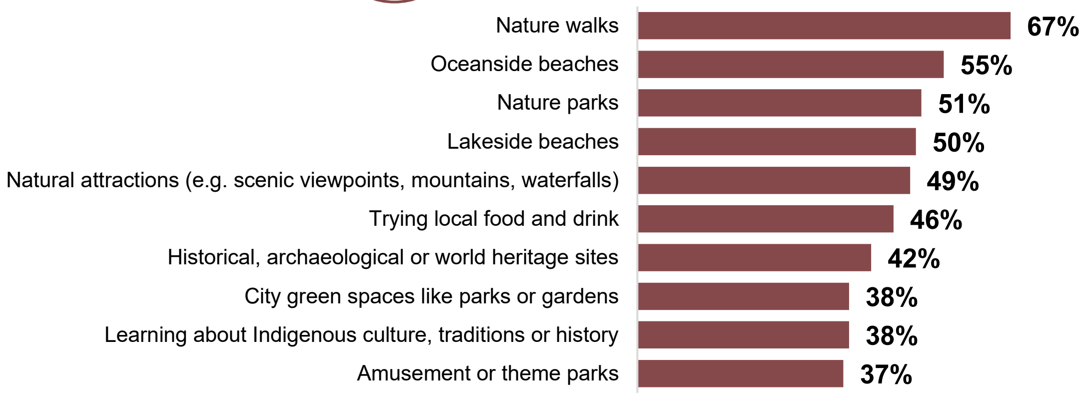
Nature and beaches were most popular among Outdoor Explorers and Refined Globetrotters. Amusement or theme parks were also high on the list for Outdoor Explorers.

Outdoor Explorers
(n=120)



Culture Seekers
(n=91)

Refined Globetrotters
(n=78)



Purpose Driven Families
(n=52)

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)

THANK YOU

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