# 2024 GLOBAL TRAVELLER RESEARCH PROGRAM

# FRANCE DEEP DIVE REPORT

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA collective

St. John's *Newfoundland and Labrador*

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# STUDY OVERVIEW: FRANCE MARKET

The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in French, 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.

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

**Timing of Fieldwork**

**November 19th – December 3rd 2024**

**Geographical Definition for Qualified Trips**

**Outside of: Europe, North Africa and the Mediterranean**

**Sample Distribution**

| | |
|---|---|
| **Sample distribution:** | **National** |
| **Highly Engaged Guest (HEG) Audience:** | 1120 |
| **Other travellers:** | 393 |
| **Total sample size:** | 1513 |

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

Newfoundland and Labrador

# SEGMENT DESCRIPTION SLIDES

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

## HIGHLY ENGAGED GUESTS

### Outdoor Explorers
Base motivations

Adventure
Novel & Authentic
Accomplishment

### Culture Seekers
Base motivations

New Connections
Novel & Authentic
Familiarity

### Refined Globetrotters
Base motivations

Novel & Authentic
Security
Escape & Relax

### Purpose Driven Families
Base motivations

Bonding
Novel & Authentic
Security

## OTHER TRAVELLER SEGMENTS

### City Trippers
Base motivations

Fun
Escape & Relax
Bonding

### Simplicity Lovers
Base motivations

Escape & Relax
Security
Simplicity

### Fun & Sun Families
Base motivations

Escape & Relax
Fun
Security

**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

# KEY INSIGHTS

# KEY INSIGHTS

**Canada's Market Potential & Competitive Destinations**

- The immediate market potential for Canada is 7.2M French Travellers

- The four HEG segments represent three-quarters (74%) of the immediate market potential:

  - ✓ **Outdoor Explorers** are the largest segment and represent 2.1M French Travellers

  - ✓ **Culture Seekers and Refined Globetrotters** are the second largest segments and represent 1.4M French Travellers each

  - ✓ At 788K, **Purpose Driven Families** represent the smallest segment despite having the second highest *incidence* of French travellers who will definitely/very likely visit Canada in the next two years

- Canada is second only to the US when French travellers think of destinations they are seriously considering (on an unaided basis) and for level of knowledge of holiday opportunities. That said, Canada ranks first in terms of NPS (+46)

- France Travellers associate Canada mainly with the outdoors, with having beautiful scenery and landscapes and great outdoor/physical activities, as well as having a culture they want to experience and explore new things and places

- Canada is also second only to the US when looking at seriously considering a trip, but scores on par with actively planning their trip. The biggest challenge for Canada is in converting those in the dream to purchase stage further down the funnel to actual visitation

- In addition, cost is a top factor that would discourage French travellers from travelling to Canada. Looking specifically at the priority segments, weather is the next greatest barrier for **Refined Globetrotters**, while **Outdoor Explorers** are more likely to say that there are other places they would rather visit

# KEY INSIGHTS

**Key Drivers & Opportunities by Priority Segment**

## Outdoor Explorers

- When it comes to **Outdoor Explorers** specifically, the top driver of holiday destination consideration is *personally meaningful to me.* Secondary drives include *a place I want to visit with my family or friends, and being a great place for holidays that avoid surprises*
- Canada delivers on being *a great place for holidays that avoid surprises* (a secondary driver), as well as being viewed as an environmentally and socially responsible destination that has great outdoor and physical activities
- There is also an opportunity for Canada to improve perceptions on being *a personally meaningful destination and a place to visit with family or friends* as no one destination currently owns this dimension of importance

## Refined Globetrotters

- In terms of Net Promoter Score (NPS), Canada performs well overall (+46), with **Refined Globetrotters** scoring the highest (+53)
- When it comes to **Refined Globetrotters** specifically, the top driver of holiday destination consideration is *being a place I want to visit friends.* Secondary drivers include *being personally meaningful to me, a good place to live, and a place with wide-open landscapes*
- Canada delivers on being *a good place to live* (a secondary driver), as well as being known for being *a great place for holidays that avoid surprises, being a socially responsible destination, and having great outdoor/physical activities and wildlife in its natural habitat*
- Of note, the US has a strength in *being personally meaningful to me as a destination* (a secondary driver)
- There is also an opportunity for Canada to improve perceptions on being *a place to visit with family and a place with wide-open landscapes* as no one destination currently owns this dimension of importance

# KEY INSIGHTS

## Fall Travel

- Seasonal potential continues to be higher in the Fall (5.5M Total) vs. the Winter (3.5M)

- Over one-half of French travellers perceive Canada as a distinct Fall destination (56%)

- Barriers for Fall travel were in line with the previous year, mainly the weather not being ideal (24%) and scheduling conflicts (22%), with mentions for weather increasing compared to last year

- Weather and having other destinations in mind during this time frame were of particular concern among **Refined Globetrotters**

- On the hand, top motivators for others were the ideal weather (41%) and cheaper travel (36%). Less crowds motivate **Outdoor Explorers** (42%), while the weather (45%) and being able to take a holiday during these months (33%) motivate **Refined Globetrotters**

## Winter Travel

- Consideration to travel for the Winter is low for Canada, and low for most destinations overall

- Almost six in ten consider Canada as a distinct Winter destination (58%)

- When it comes to Winter travel, **Refined Globetrotters** are most motivated by the ability to take a holiday during these months (40%), while **Outdoor Explorers** were motivated by the weather (40%) and there being specific places they wanted to visit during these months (38%)

- The main barriers to travelling to Canada in the Winter is the weather being too cold, and this is true across all segments

# KEY INSIGHTS

**DESTINATION CANADA**

**Recent Trip to Canada: Profile**

- One-half of French Travellers who travelled to Canada went for a holiday, on par with last year and similar among HEGs
  - Summer, followed by Fall and Spring were the most popular time to visit
- Nature-focused activities were top activities for **Outdoor Explorers** and **Refined Globetrotters**, while art galleries or museums and trying local food/drinks were high on the list for **Culture Seekers**
- For travellers to Canada, there was an increase in combining business with personal trips compared to last year, although most still travelled for holiday. As well, usage of an online booking engine or booking directly with the establishment for accommodations has increased compared to last year; as well as the usage of luxury hotels (32%)
- Compared to other destinations, trips to Canada differed in the following ways:
  - 18% combined business with personal reasons (vs. 10% for other destinations)
  - Most trips lasted 4-13 nights (58%), however only one in four (25%) stayed for over 14 nights compared to 36% for other destinations
  - Travel agents or tour operators were used by 46% of travellers to Canada, compared to 37% for other destinations
  - Travellers to Canada were more likely to book flights or accommodations online via an online booking engine

# MARKET SIZING

# MARKET SIZING – LONG-HAUL TRAVELLERS

**DESTINATION CANADA**

**Total Population 18+**

| 51,373,500 (Total FR Population 18+) |
| --- |

**28% Took a Long-Haul^ Pleasure Trip in the Past 3 Years**

**32% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years**

14,384,500 (Recent Long-Haul Travellers)

16,439,500 (Upcoming Long-Haul Travellers)

**37.9% Incidence Rate**

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

| 19,470,500 (Total Long-haul Travellers) |
| --- |

^ Long-haul = outside of Europe, North Africa and the Mediterranean
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=1047)

# POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

*France's overall target market and immediate potential for Canada have remained stable compared to last year, with 7.2M travellers definitely or very likely to visit Canada in the next two years.*

| | |
|---|---|
| Total potential **Long-Haul Pleasure** travellers aged 18 years or more | **19,470,500** |
| | x |
| **Target Market for Canada** *(Those in the dream to purchase stages of the path to purchase for Canada)* | **73.2%** |
| | = |
| Size of the Target Market | **14,260,000** |
| | x |
| **Immediate Potential for Canada** *(Will definitely/very likely visit Canada in the next 2 years[1])* | **50.2%** |
| | = |
| Immediate Potential | **7,151,500** |

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1513); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1109)
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

*Among segments, Outdoor Explorers offer the largest immediate potential for Canada, with 2.1M travellers likely to visit in the next two years, followed by Culture Seekers and Refined Globetrotters at 1.4M each. The Fall season has the biggest opportunity across all segments.*

| | 19,470,500 (Total Long-Haul Travellers) | | | | | | |
|---|---|---|---|---|---|---|---|
| **Total segment sizes** | 5,235,500 Outdoor Explorers | | 3,736,500 Culture Seekers | | 3,541,500 Refined Globetrotters | | 1,896,500 Purpose Driven Families | |
| **X** | | | | | | | |
| **Target Market for Canada** *(Those in the dream to purchase stages of the path to purchase for Canada)* | 74.9% | | 70.3% | | 76.5% | | 76.8% | |
| **=** | | | | | | | |
| Size of the Target Market | **3,921,500** | | **2,625,000** | | **2,709,000** | | **1,456,000** | |
| **X** | | | | | | | |
| **Immediate Potential for Canada** *(Will definitely/very likely visit Canada in the next 2 years[1])* | 54.6% | | 52.1% | | 50.2% | | 54.1% | |
| **=** | | | | | | | |
| Immediate Potential | **2,142,500** | | **1,368,000** | | **1,360,500** | | **787,500** | |
| **X** | | | | | | | |
| **Immediate Seasonal Potential** *(Consideration for Canada in [SEASON] in next 2 years)* | **Fall** 40.3% | **Winter** 30.8% | **Fall** 35.8% | **Winter** 28.3% | **Fall** 33.8% | **Winter** 19.8% | **Fall** 40.5% | **Winter** 29.6% |
| **=** | | | | | | | | |
| Immediate Seasonal Potential | **Fall** 863,000 | **Winter** 659,000 | **Fall** 489,500 | **Winter** 387,500 | **Fall** 460,500 | **Winter** 269,500 | **Fall** 318,500 | **Winter** 233,000 |
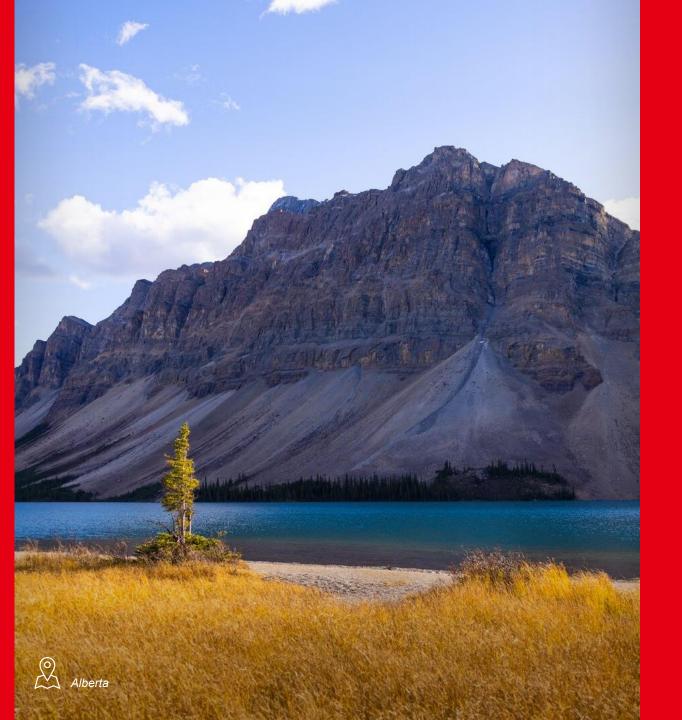
[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=406); Culture Seekers (n=290); Refined Globetrotters (n=277); Purpose Driven Families (n=147)
Immediate potential for Canada = dream to purchase stages for P2P for Canada: Outdoor Explorers (n=304); Culture Seekers (n=204); Refined Globetrotters (n=212); Purpose Driven Families (n=113)
Immediate autumn potential for Canada: Outdoor Explorers (n=166); Culture Seekers (n=106); Refined Globetrotters (n=106); Purpose Driven Families (n=61); Immediate winter potential for Canada: Outdoor Explorers (n=166); Culture Seekers (n=106); Refined Globetrotters (n=106); Purpose Driven Families (n=61)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years?

# CANADA VS. COMPETITORS

Alberta

# PAST VISITATION

**Canada ranks second in past visitation among total travellers and HEGs in France. Recent visitation is higher among HEGs.**

|  | **Total France** | **HEG Audience** |
|---|---|---|

■ Visited more than 3 years ago   ■ Visited in the past 3 years   *Ever visit*

| Country | Total France: >3 yrs | past 3 yrs | Ever visit | HEG: >3 yrs | past 3 yrs | Ever visit |
|---|---|---|---|---|---|---|
| United States | 32% | 19% | **50%** | 32% | 20% ⊕ | **52%** ⊕ |
| Canada | 22% | 14% | *36%* | 24% ⊕ | 16% ⊕ | *40%* ⊕ |
| Thailand | 20% | 9% | *29%* | 23% ⊕ | 10% | *32%* ⊕ |
| Mexico | 16% | 5% | *21%* | 17% ⊕ | 6% ⊕ | *24%* ⊕ |
| United Arab Emirates | 11% | 7% | *19%* | 14% ⊕ | 8% | *21%* ⊕ |
| Japan | 12% | 6% | *18%* | 13% ⊕ | 7% ⊕ | *20%* ⊕ |
| Australia | 12% | 5% | *17%* | 13% ⊕ | 6% ⊕ | *19%* ⊕ |
| India | 11% | 4% | *15%* | 13% | 4% ⊕ | *17%* ⊕ |
| China | 10% | 4% | *14%* | 12% | 4% ⊕ | *16%* ⊕ |
| Iceland | 10% | 4% | *14%* | 12% ⊕ | 5% ⊕ | *17%* ⊕ |
| Other | 32% | 26% | *58%* | 32% | 27% | *59%* |

**Ever visit Canada:**
**Outdoor Explorers: 39%**
**Refined Globetrotters: 39%**

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1513); HEG (n=1120)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of Europe, North Africa and the Mediterranean** which was 1 or more nights long?

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

# NUMBER OF VISITS EVER & TIME OF YEAR VISITED CANADA

*Summer, followed by Fall and Spring are the main seasons for total French travellers and HEGs to travel to Canada.*



**Number of visits ever**

- Total France
- HEG Audience

| 1 time | 46% (Total France) / 45% (HEG Audience) |
| 2 times | 28% / 28% |
| 3+ times | 25% / 27% |

**Time of year visited**

- Total France
- HEG Audience

| Month | Total France | HEG Audience |
|---|---|---|
| December | 10% | 10% |
| January | 10% | 10% |
| February | 10% | 10% |
| March | 10% | 11% |
| April | 12% | 11% |
| May | 17% | 17% |
| June | 20% | 19% |
| July | 21% | 21% |
| August | 19% | 18% |
| September | 22% | 21% |
| October | 15% | 14% |
| November | 7% | 6% |

| | Total Travellers | Total HEG Travellers |
|---|---|---|
| **Winter** | 23% | 23% |
| **Spring** | 32% | 32% |
| **Summer** | 48% | 48% |
| **Fall** | 33% | 32% |

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada (n=540); HEG (n=442)
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.

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⊕ / ⊖ = 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, and Refined Globetrotters score Canada the highest.**

**NPS**

| +46 | +42 | +41 | +53 | +45 |
|------|------|------|------|------|

- Promoters (9-10)
- Passives (7-8)
- Detractors (0-6)

| | Total France | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|---|
| Promoters | 57% | 55% | 56% | 57% | 59% |
| Passives | 31% | 31% | 30% | 39% | 26% |
| Detractors | 12% | 13% | 14% | 4% | 14% |

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=540); Outdoor Explorers (n=158); Culture Seekers (n=126); Refined Globetrotters (n=109); Purpose Driven Families (n=49*)
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
*Small base size, interpret with caution (n<50)
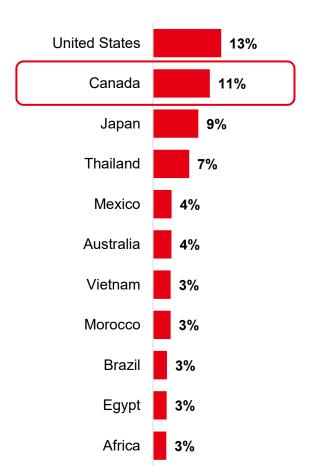
# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)
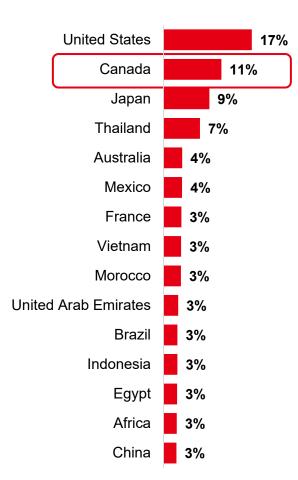
*Canada ranks second only to the US when it comes to destinations most top of mind for trips in the next 2 years.*

## Top Destination Brands[1]

| Destination | % |
|---|---|
| United States | 13% |
| **Canada** | **11%** |
| Japan | 9% |
| Thailand | 7% |
| Mexico | 4% |
| Australia | 4% |
| Vietnam | 3% |
| Morocco | 3% |
| Brazil | 3% |
| Egypt | 3% |
| Africa | 3% |

## Top Destinations[2]

| Destination | % |
|---|---|
| United States | 17% |
| **Canada** | **11%** |
| Japan | 9% |
| Thailand | 7% |
| Australia | 4% |
| Mexico | 4% |
| France | 3% |
| Vietnam | 3% |
| Morocco | 3% |
| United Arab Emirates | 3% |
| Brazil | 3% |
| Indonesia | 3% |
| Egypt | 3% |
| Africa | 3% |
| China | 3% |

**Canada:**
**Outdoor Explorers: 11%**
**Refined Globetrotters: 12%**

[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=1513)
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)
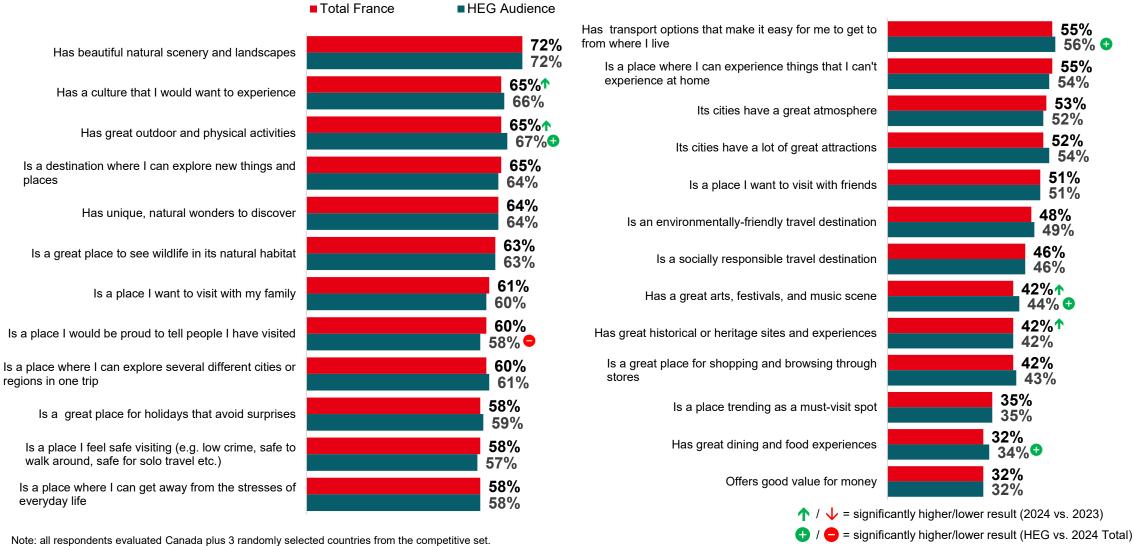
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

# IMPRESSIONS OF CANADA AS A HOLIDAY DESTINATION

*Canada is mainly associated with the outdoors as it has the highest scores on having beautiful scenery and landscapes, great outdoor/physical activities, as well as a culture to experience and a destination to explore new things and places.*

■ Total France   ■ HEG Audience

| Attribute | Total France | HEG Audience |
|---|---|---|
| Has beautiful natural scenery and landscapes | 72% | 72% |
| Has a culture that I would want to experience | 65% ↑ | 66% |
| Has great outdoor and physical activities | 65% ↑ | 67% ⊕ |
| Is a destination where I can explore new things and places | 65% | 64% |
| Has unique, natural wonders to discover | 64% | 64% |
| Is a great place to see wildlife in its natural habitat | 63% | 63% |
| Is a place I want to visit with my family | 61% | 60% |
| Is a place I would be proud to tell people I have visited | 60% | 58% ⊖ |
| Is a place where I can explore several different cities or regions in one trip | 60% | 61% |
| Is a great place for holidays that avoid surprises | 58% | 59% |
| Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) | 58% | 57% |
| Is a place where I can get away from the stresses of everyday life | 58% | 58% |

| Attribute | Total France | HEG Audience |
|---|---|---|
| Has transport options that make it easy for me to get to from where I live | 55% | 56% ⊕ |
| Is a place where I can experience things that I can't experience at home | 55% | 54% |
| Its cities have a great atmosphere | 53% | 52% |
| Its cities have a lot of great attractions | 52% | 54% |
| Is a place I want to visit with friends | 51% | 51% |
| Is an environmentally-friendly travel destination | 48% | 49% |
| Is a socially responsible travel destination | 46% | 46% |
| Has a great arts, festivals, and music scene | 42% ↑ | 44% ⊕ |
| Has great historical or heritage sites and experiences | 42% ↑ | 42% |
| Is a great place for shopping and browsing through stores | 42% | 43% |
| Is a place trending as a must-visit spot | 35% | 35% |
| Has great dining and food experiences | 32% | 34% ⊕ |
| Offers good value for money | 32% | 32% |

↑ / ↓ = 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=1513); HEG (n=1120)
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.

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# CONSIDERATION FUNNELS: TOTAL FRANCE

**Familiar**
**Dream to Purchase**
**Consider to Purchase**
**Actively Planning**
**Committed**

> *More than one third (35%) of French travellers are seriously considering a trip to Canada in the next two years. Although this is slightly lower than consideration for the US, scores are similar for actively planning their trip.*

## Canada
- 91%
- 80% → 73%
- 48% → 35%
- 46% → 16%
- 25% → 4%

## United States
- 93%
- 74% → 69%
- 54% → 37%
- 43% → 16%
- 31% → 5%

## Thailand
- 82%
- 72% → 59%
- 44% → 26%
- 50% → 13%
- 31% → 4%

## Japan
- 81%
- 77% → 62%
- 52% → 32%
- 53% → 17%
- 24% → 4%

## Iceland
- 80%
- 74% → 59%
- 44% → 26%
- 50% → 13%
- 23% → 3%

## Australia
- 79%
- 77% → 61%
- 38% → 23%
- 52% → 12%
- 17% → 2%

## Mexico
- 74%
- 74% → 55%
- 44% → 24%
- 42% → 10%
- 20% → 2%

## China
- 70%
- 60% → 42%
- 40% → 17%
- 59% → 10%
- 30% → 3%

## India
- 67%
- 61% → 41%
- 44% → 18%
- 50% → 9%
- 11% → 1%

## United Arab Emirates
- 63%
- 49% → 31%
- 55% → 17%
- 53% → 9%
- 22% → 2%

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

*Among HEGs, consideration for Canada ranks second behind the US, however actively planning a trip is highest for Japan.*

**Funnel legend:** Familiar / Dream to Purchase / Consider to Purchase / Actively Planning / Committed

## Canada
- Familiar: 93%
- Dream to Purchase: 74% (80%)
- Consider to Purchase: 37% (50%)
- Actively Planning: 17% (46%)
- Committed: 5% (29%)

## United States
- Familiar: 93%
- Dream to Purchase: 68% (73%)
- Consider to Purchase: 38% (56%)
- Actively Planning: 17% (45%)
- Committed: 4% (24%)

## Thailand
- Familiar: 83%
- Dream to Purchase: 59% (71%)
- Consider to Purchase: 29% (49%)
- Actively Planning: 15% (52%)
- Committed: 5% (33%)

## Japan
- Familiar: 83%
- Dream to Purchase: 65% (78%)
- Consider to Purchase: 35% (54%)
- Actively Planning: 18% (51%)
- Committed: 5% (28%)

## Iceland
- Familiar: 83%
- Dream to Purchase: 63% (76%)
- Consider to Purchase: 28% (44%)
- Actively Planning: 15% (54%)
- Committed: 4% (27%)

## Australia
- Familiar: 83%
- Dream to Purchase: 63% (76%)
- Consider to Purchase: 24% (38%)
- Actively Planning: 14% (58%)
- Committed: 3% (21%)

## Mexico
- Familiar: 78%
- Dream to Purchase: 59% (76%)
- Consider to Purchase: 27% (46%)
- Actively Planning: 11% (41%)
- Committed: 3% (27%)

## China
- Familiar: 74%
- Dream to Purchase: 43% (58%)
- Consider to Purchase: 18% (42%)
- Actively Planning: 11% (61%)
- Committed: 3% (27%)

## India
- Familiar: 70%
- Dream to Purchase: 43% (61%)
- Consider to Purchase: 20% (47%)
- Actively Planning: 11% (55%)
- Committed: 2% (18%)

## United Arab Emirates
- Familiar: 66%
- Dream to Purchase: 30% (45%)
- Consider to Purchase: 17% (57%)
- Actively Planning: 10% (59%)
- Committed: 2% (20%)

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 Audience, Evaluated [DESTINATION]
See notes for question wording and funnel definitions

# LEVEL OF KNOWLEDGE OF HOLIDAY OPPORTUNITIES

*Canada ranks second overall in knowledge of holiday opportunities among both French travellers and HEGs.*

| **Total France** | | | | **HEG Audience** | | | |
|---|---|---|---|---|---|---|---|

■ Very good  ■ Excellent  *Very good/Excellent*

| Total France | Very good | Excellent | V.good/Excellent | HEG Audience | Very good | Excellent | V.good/Excellent |
|---|---|---|---|---|---|---|---|
| United States (n=505) | 25% | 16% | *42%* | United States (n=377) | 26% | 18% | *44%* ⊕ |
| Canada (n=1513) | 23% | 17% | *40%* | Canada (n=1120) | 24% | 19% ⊕ | *43%* ⊕ |
| Japan (n=504) | 19% | 12% | *31%* | Japan (n=374) | 19% | 14% ⊕ | *34%* ⊕ |
| Thailand (n=504) | 17% | 11% | *29%* | Thailand (n=381) | 18% | 14% ⊕ | *32%* ⊕ |
| Australia (n=505) | 16% | 10% | *26%* | Australia (n=370) | 17% | 11% | *28%* |
| Iceland (n=504) | 16% | 10% | *26%* | Iceland (n=385) | 20% ⊕ | 10% | *30%* ⊕ |
| Mexico (n=504) | 16% | 6% | *21%* | Mexico (n=373) | 18% ⊕ | 7% | *24%* ⊕ |
| United Arab Emirates (n=506) | 12% | 9% | *20%* | United Arab Emirates (n=366) | 13% | 10% ⊕ | *23%* ⊕ |
| China (n=504) | 10% | 6% | *16%* | China (n=365) | 10% | 8% ⊕ | *18%* ⊕ |
| India (n=503) | 10% | 5% | *15%* | India (n=369) | 13% | 6% ⊕ | *19%* ⊕ |

↑ / ↓ = 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)

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# KEY DRIVERS

# DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (OUTDOOR EXPLORERS)

*Personal meaning is the top factor for Outdoor Explorers as they consider destinations. Secondary drivers include is a place I want to visit with my family or friends and being a great place for holidays that avoid surprises.*

☐ = Brand Value Statement

| Attribute | Value |
|---|---|
| Is personally meaningful to me as a destination | 7.80% |
| Is a place I want to visit with my family | 6.47% |
| Is a great place for holidays that avoid surprises | 5.43% |
| Is a place I want to visit with friends | 5.24% |
| Is a place I would be proud to tell people I have visited | 4.60% |
| Is a destination where I can explore new things and places | 4.16% |
| Is a good place to live | 3.71% |
| Has a great arts, festivals, and music scene | 3.69% |
| Is a socially responsible travel destination | 3.15% |
| Its cities have a great atmosphere | 2.93% |
| Is a place trending as a must-visit spot | 2.74% |
| Is a great place to see wildlife in its natural habitat | 2.51% |
| Is a place where the people are welcoming | 2.49% |
| Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) | 2.46% |
| Is a place where the people embrace new ideas | 2.42% |
| Has great outdoor and physical activities | 2.30% |
| Is a place where the people are open-minded | 2.25% |
| Is a place where nature can be enjoyed in close proximity to cities | 2.24% |
| Has beautiful natural scenery and landscapes | 2.22% |
| Is an environmentally-friendly travel destination | 2.17% |
| Is a place with wide-open landscapes | 2.16% |
| Is a place where I can get away from the stresses of everyday life | 2.15% |
| Is a place that embraces cultural diversity | 2.11% |
| Is a place where I can explore several different cities or regions in one trip | 2.08% |
| Is a place where I can experience things that I can't experience at home | 2.07% |
| Is a place where I can enjoy the vastness of nature | 2.00% |
| Has transport options that make it easy for me to get to from where I live | 1.99% |
| Offers good value for money | 1.96% |
| Has unique, natural wonders to discover | 1.96% |
| Is a great place for shopping and browsing through stores | 1.90% |
| Has a culture that I would want to experience | 1.89% |
| Has a distinctive identity that can't be replicated by other destinations | 1.84% |
| Its cities have a lot of great attractions | 1.73% |
| Has great historical or heritage sites and experiences | 1.70% |
| Has great dining and food experiences | 1.46% |

## Description

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

## Interpretation

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

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Outdoor Explorers (n=406)
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)

*To OEs, Canada is a great place for holidays that avoid surprises, and is an environmentally and socially responsible destination that has great outdoor and physical activities. There are several dimensions that represent white space as no one destination dominates them, two of which are top drivers of consideration.*

Legend: **S** = Strength (green), **W** = Weakness (pink). Blank = neither.

| | | Canada | Australia | China | Iceland | India | Japan | Mexico | Thailand | United Arab Emirates | United States |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | n= | 406 | 148 | 137 | 128 | 138 | 135 | 136 | 139 | 133 | 124 |
| **Higher Order Motivations** | Is a place where I can get away from the stresses of everyday life | | | | S | | | | | | W |
| | Is a place I would be proud to tell people I have visited | | | | | | | | | | |
| | Is a destination where I can explore new things and places | W | | S | | | | | | | |
| **General Needs** | Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) | | | | S | W | S | W | S | S | W |
| | Is a place where I can explore several different cities or regions in one trip | | | | | W | | | | | |
| | Offers good value for money | | W | | | S | W | S | W | S | |
| | Has transport options that make it easy for me to get to from where I live | | | | | | | W | | S | |
| **Type of Trip** | Is a place I want to visit with friends | | | | | | | | | | |
| | Is a place I want to visit with my family | | | | | | | | | | |
| | Is a great place for holidays that avoid surprises | S | | | | W | | | | | |
| | Is a place where I can experience things that I can't experience at home | W | | | | S | | | | | W |
| | Is an environmentally-friendly travel destination | S | | W | | W | | | | | S |
| | Is a socially responsible travel destination | S | S | W | S | | | W | | | W |
| | Is a place trending as a must-visit spot | W | | | | W | | | | S | |
| **To-Do** | Is a great place for shopping and browsing through stores | | | | | W | S | | | S | S |
| | Its cities have a lot of great attractions | | | | | W | S | | | S | S |
| | Has great outdoor and physical activities | S | | | S | W | W | | | | |
| | Has great dining and food experiences | W | W | S | S | S | S | S | S | W | W |
| | Has a great arts, festivals, and music scene | | | | W | | | | | | S |
| **To-See** | Its cities have a great atmosphere | | | | | | | | | | |
| | Has beautiful natural scenery and landscapes | | | | | | | | | W | |
| | Is a great place to see wildlife in its natural habitat | | S | W | S | | | W | | | |
| | Has great historical or heritage sites and experiences | W | | S | S | S | | S | | | W |
| | Has a culture that I would want to experience | | | | | | | | | | |
| | Has unique, natural wonders to discover | | | | | | | S | | W | |

**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)

*To OEs, Canada is also an open-minded destination, where people can embrace new ideas and enjoy the vastness of nature, and is a good place to live. That said, there is white space for Canada to be recognized as a place where nature can be enjoyed in close proximities to cities and being a personally meaningful destination, which is the top driver of consideration.*

| | Canada | Australia | China | Iceland | India | Japan | Mexico | Thailand | United Arab Emirates | United States |
|---|---|---|---|---|---|---|---|---|---|---|
| n= | 406 | 148 | 137 | 128 | 138 | 135 | 136 | 139 | 133 | 124 |
| Is a place with wide-open landscapes | | | | | | | | | | |
| Is a place where nature can be enjoyed in close proximity to cities | | | | | Weakness | | | | | |
| Is a place that embraces cultural diversity | | | | Weakness | | | | | | Strength |
| Is a place where the people are welcoming | | | | | | | | Strength | | Weakness |
| Is a place where the people are open-minded | Strength | | Weakness | | | | | | | |
| Is a place where the people embrace new ideas | Strength | | Weakness | | Weakness | | | | | Strength |
| Is a good place to live | Strength | | Weakness | | Weakness | | Weakness | | | |
| Has a distinctive identity that can't be replicated by other destinations | Weakness | Weakness | Strength | | Strength | | | | | Weakness |
| Is personally meaningful to me as a destination | | | | | | | | | | |
| Is a place where I can enjoy the vastness of nature | Strength | Strength | | Strength | | | Weakness | | 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.

*Perceptions of Canada as being personally meaningful, being a great place for holidays that avoid surprises, and being a place to visit with family are high and should continue to be maintained. That said, there is opportunity to further develop perceptions of Canada being a place I want to visit with friends.*



**Relative Strength/Weakness for Canada**

**Weaker Influence/ Higher Perception of Canada**

**Stronger Influence/ Higher Perception of Canada**

**Weaker Influence/ Lower Perception of Canada**

**Stronger Influence/ Weaker Perception of Canada**

Is a place where the people are open-minded
Is a good place to live
Is a place where the people embrace new ideas
Has great outdoor and physical activities
Is an environmentally-friendly travel destination
Is a place where nature can be enjoyed in close proximity to cities
Is a great place for holidays that avoid surprises
Is a place where I can enjoy the vastness of nature
Is a socially responsible travel destination
Is a place I want to visit with my family
Is a place that embraces cultural diversity
Is a great place to see wildlife in its natural habitat
Is a place where the people are welcoming
Has transport options that make it easy for me to get to from where I live
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)
Is personally meaningful to me as a destination
Its cities have a great atmosphere
Is a place with wide-open landscapes
Is a place where I can get away from the stresses of everyday life
Has a great arts, festivals, and music scene
Is a place I want to visit with friends
Its cities have a lot of great attractions
Has beautiful natural scenery and landscapes
Is a place where I can explore several different cities or regions in one trip
Is a place I would be proud to tell people I have visited
Is a great place for shopping and browsing through stores
Has a culture that I would want to experience
Has unique, natural wonders to discover
Offers good value for money
Is a place where I can experience things that I can't experience at home
Is a place trending as a must-visit spot
Is a destination where I can explore new things and places
Has great historical or heritage sites and experiences
Has a distinctive identity that can't be replicated by other destinations
Has great dining and food experiences

**Influence on Likelihood to Consider Any Destination**

◯ = Primary key driver
◯ = Secondary key driver

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*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 good place to live, and a place with wide-open landscape.*

□ = Brand Value Statement

| Attribute | Value |
|---|---|
| Is a place I want to visit with friends | 6.26% |
| Is personally meaningful to me as a destination | 5.61% |
| Is a good place to live | 5.23% |
| Is a place with wide-open landscapes | 4.46% |
| Is an environmentally-friendly travel destination | 4.07% |
| Is a place I would be proud to tell people I have visited | 3.93% |
| Is a place where the people embrace new ideas | 3.32% |
| Is a place I want to visit with my family | 3.22% |
| Is a place where I can experience things that I can't experience at home | 3.01% |
| Has transport options that make it easy for me to get to from where I live | 2.96% |
| Has a culture that I would want to experience | 2.94% |
| Is a place where I can get away from the stresses of everyday life | 2.82% |
| Is a great place for holidays that avoid surprises | 2.70% |
| Has great historical or heritage sites and experiences | 2.69% |
| Is a place where nature can be enjoyed in close proximity to cities | 2.66% |
| Is a destination where I can explore new things and places | 2.65% |
| Is a place where I can explore several different cities or regions in one trip | 2.58% |
| Is a socially responsible travel destination | 2.55% |
| Is a place that embraces cultural diversity | 2.49% |
| Has great outdoor and physical activities | 2.48% |
| Has unique, natural wonders to discover | 2.48% |
| Has beautiful natural scenery and landscapes | 2.43% |
| Is a place where the people are open-minded | 2.40% |
| Is a place where I can enjoy the vastness of nature | 2.37% |
| Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) | 2.36% |
| Its cities have a lot of great attractions | 2.30% |
| Is a place where the people are welcoming | 2.25% |
| Is a great place to see wildlife in its natural habitat | 2.11% |
| Has great dining and food experiences | 2.00% |
| Has a distinctive identity that can't be replicated by other destinations | 1.96% |
| Its cities have a great atmosphere | 1.93% |
| Offers good value for money | 1.85% |
| Is a place trending as a must-visit spot | 1.84% |
| Is a great place for shopping and browsing through stores | 1.62% |
| Has a great arts, festivals, and music scene | 1.47% |

## Description

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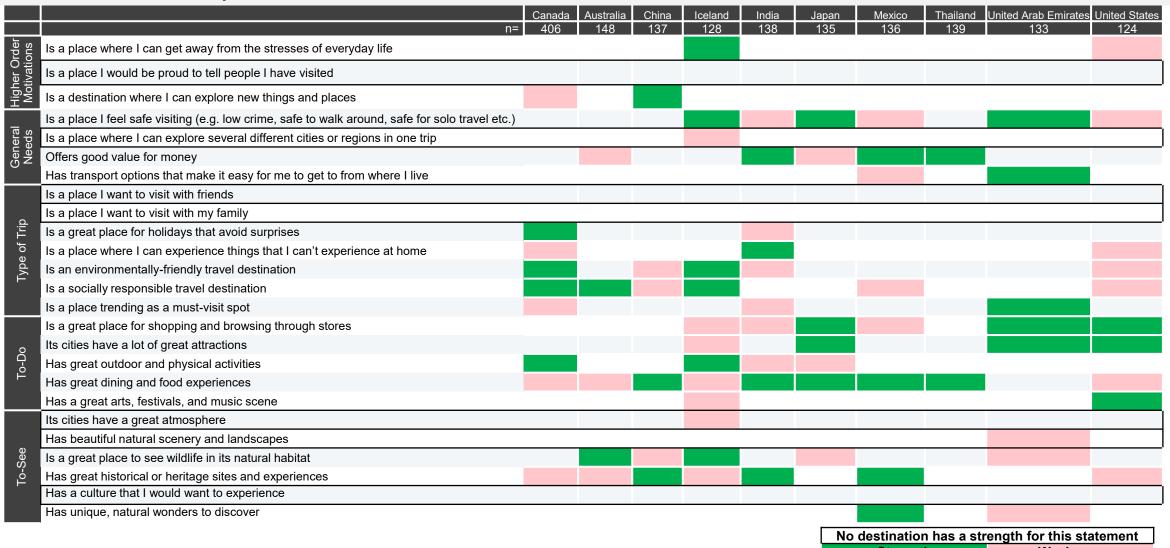
## Interpretation

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

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Refined Globetrotters (n=277)
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 CANADA**

> *To RGs, Canada is strongly associated with being a great place for holidays that avoid surprises, being a socially responsible destination, and having great outdoor/physical activities and wildlife in its natural habitat.*

| | | Canada | Australia | China | Iceland | India | Japan | Mexico | Thailand | United Arab Emirates | United States |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | n= | 277 | 87 | 89 | 99 | 98 | 90 | 94 | 87 | 95 | 92 |
| **Higher Order Motivations** | Is a place where I can get away from the stresses of everyday life | | | W | S | | | | | | |
| | Is a place I would be proud to tell people I have visited | | | | | | S | | | | |
| | Is a destination where I can explore new things and places | W | | S | | S | | | | | |
| **General Needs** | Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) | | | | S | W | S | | | | W |
| | Is a place where I can explore several different cities or regions in one trip | | | S | W | | | | | | |
| | Offers good value for money | | W | | | S | W | | S | | W |
| | Has transport options that make it easy for me to get to from where I live | | W | | | | | | | S | S |
| **Type of Trip** | Is a place I want to visit with friends | | | | | | | S | | | |
| | Is a place I want to visit with my family | | | | | | | | | | |
| | Is a great place for holidays that avoid surprises | S | | W | S | W | | | | | |
| | Is a place where I can experience things that I can't experience at home | W | | | | S | | | | | |
| | Is an environmentally-friendly travel destination | | | W | S | | | | | | W |
| | Is a socially responsible travel destination | S | | | | W | | | W | | W |
| | Is a place trending as a must-visit spot | W | W | | | | | | S | S | |
| **To-Do** | Is a great place for shopping and browsing through stores | | | | | W | W | W | | S | S |
| | Its cities have a lot of great attractions | | | S | W | | | | | S | S |
| | Has great outdoor and physical activities | S | | W | S | W | | W | | | |
| | Has great dining and food experiences | | | S | S | S | S | S | S | | W |
| | Has a great arts, festivals, and music scene | | | | W | | | | | S | S |
| **To-See** | Its cities have a great atmosphere | | | W | W | | | S | | | S |
| | Has beautiful natural scenery and landscapes | | S | | | | | | | W | W |
| | Is a great place to see wildlife in its natural habitat | S | S | | W | | | W | | W | |
| | Has great historical or heritage sites and experiences | W | | S | W | S | | | S | W | W |
| | Has a culture that I would want to experience | | | S | | | | | | | |
| | Has unique, natural wonders to discover | | | | | | | | | W | W |

**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.

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# BRAND VALUE STATEMENTS (REFINED GLOBETROTTERS)

*RGs also believe Canada has a strong association with most of the brand value statements: being a place where nature can be enjoyed in close proximity to cities, where people are welcoming, open-minded and can embrace new ideas, is a good place to live and enjoying the vastness of nature. That said, no one destination has a relative strength in being a place with wide-open landscapes, a top driver of consideration.*

| | Canada | Australia | China | Iceland | India | Japan | Mexico | Thailand | United Arab Emirates | United States |
|---|---|---|---|---|---|---|---|---|---|---|
| n= | 277 | 87 | 89 | 99 | 98 | 90 | 94 | 87 | 95 | 92 |
| Is a place with wide-open landscapes | | | | | | Weakness | | | Weakness | |
| Is a place where nature can be enjoyed in close proximity to cities | Strength | Strength | | Strength | | Weakness | | | | |
| Is a place that embraces cultural diversity | | | | Weakness | Strength | Weakness | | | | Strength |
| Is a place where the people are welcoming | Strength | | | Weakness | Strength | Weakness | | Strength | | Weakness |
| Is a place where the people are open-minded | Strength | | Weakness | | Weakness | Weakness | | | | |
| Is a place where the people embrace new ideas | Strength | | | | Weakness | Weakness | | Weakness | | Strength |
| Is a good place to live | Strength | | Weakness | | Weakness | | | | | Weakness |
| Has a distinctive identity that can't be replicated by other destinations | Weakness | | Strength | | Strength | Strength | | | | Weakness |
| Is personally meaningful to me as a destination | | | | | Weakness | | | | | Strength |
| Is a place where I can enjoy the vastness of nature | Strength | Strength | | Strength | | Weakness | | | | |

**No destination has a strength for this statement**

**Strength** / **Weakness**

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# CANADA STRENGTHS & OPPORTUNITIES (REFINED GLOBETROTTERS)

*Perceptions of Canada as being a good place to live and is a destination personally meaningful to me are high. That said, there is opportunity to further develop perceptions of Canada being a destination I want to visit with friends and has wide-open landscapes.*



Relative Strength/Weakness for Canada (vertical axis)

Influence on Likelihood to Consider Any Destination (horizontal axis)

**Weaker Influence/ Higher Perception of Canada** (top-left quadrant)

**Stronger Influence/ Higher Perception of Canada** (top-right quadrant)

**Weaker Influence/ Lower Perception of Canada** (bottom-left quadrant)

**Stronger Influence/ Weaker Perception of Canada** (bottom-right quadrant)

Plotted items:
- Is a place where the people are open-minded
- Is a place where I can enjoy the vastness of nature
- Has great outdoor and physical activities
- Is a socially responsible travel destination
- Is a place where the people are welcoming
- Is a great place to see wildlife in its natural habitat
- Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)
- Is a place that embraces cultural diversity
- Is a place where the people embrace new ideas
- Is a good place to live
- Is a place where nature can be enjoyed in close proximity to cities
- Is an environmentally-friendly travel destination
- Is a great place for holidays that avoid surprises
- Is a place where I can get away from the stresses of everyday life
- Is personally meaningful to me as a destination
- Has transport options that make it easy for me to get to from where I live
- Is a place I want to visit with my family
- Has beautiful natural scenery and landscapes
- Has a great arts, festivals, and music scene
- Its cities have a great atmosphere
- Is a great place for shopping and browsing through stores
- Offers good value for money
- Its cities have a lot of great attractions
- Is a place trending as a must-visit spot
- Is a place where I can explore several different cities or regions in one trip
- Has unique, natural wonders to discover
- Has a distinctive identity that can't be replicated by other destinations
- Has great dining and food experiences
- Is a place with wide-open landscapes
- Is a place I want to visit with friends
- Is a place I would be proud to tell people I have visited
- Has a culture that I would want to experience
- Is a destination where I can explore new things and places
- Is a place where I can experience things that I can't experience at home
- Has great historical or heritage sites and experiences

Legend:
- ◯ = Primary key driver
- ◯ (dashed) = Secondary key driver

# SEASONAL TRAVEL

Dezadeash River
*Yukon*

# TOP UNAIDED FALL DESTINATIONS: BY SEGMENTS

*Canada is the most top of mind Fall destination across all segments by a wide margin.*

### Outdoor Explorers
(n=208)

| Destination | % |
|---|---|
| Canada | **29%** |
| United States | **11%** |
| Japan | **10%** |
| Spain | **9%** |
| Italy | **9%** |
| France | **7%** |
| United Kingdom | **6%** |

### Culture Seekers
(n=140)

| Destination | % |
|---|---|
| Canada | **26%** |
| United States | **14%** |
| Morocco | **9%** |
| Italy | **7%** |
| Japan | **7%** |
| Africa | **6%** |
| United Kingdom | **6%** |

### Refined Globetrotters
(n=143)

| Destination | % |
|---|---|
| Canada | **29%** |
| United States | **15%** |
| Spain | **9%** |
| Morocco | **8%** |
| Japan | **8%** |
| Italy | **8%** |

### Purpose Driven Families
(n=82)

| Destination | % |
|---|---|
| Canada | **33%** |
| Japan | **11%** |
| United States | **11%** |
| United Kingdom | **6%** |
| South Korea | **6%** |

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 Europe, North Africa and the Mediterranean.) [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 is also the most top of mind Winter destination among all segments. Among RGs, Finland receives equal mentions to Canada.*

## Outdoor Explorers
(n=198)

| Destination | % |
|---|---|
| Canada | **21%** |
| Finland | **12%** |
| Norway | **12%** |
| France | **10%** |
| United States | **9%** |
| Switzerland | **7%** |

## Culture Seekers
(n=150)

| Destination | % |
|---|---|
| Canada | **14%** |
| Finland | **11%** |
| Norway | **9%** |
| United States | **9%** |
| France | **9%** |
| Switzerland | **7%** |

## Refined Globetrotters
(n=134)

| Destination | % |
|---|---|
| Canada | **19%** |
| Finland | **19%** |
| France | **13%** |
| Norway | **13%** |
| Switzerland | **7%** |
| Sweden | **7%** |
| United States | **6%** |

## Purpose Driven Families
(n=65)

| Destination | % |
|---|---|
| Canada | **26%** |
| Finland | **16%** |
| Norway | **15%** |
| Sweden | **15%** |
| United States | **11%** |
| Italy | **8%** |
| Spain | **6%** |
| Alps | **6%** |
| France | **6%** |

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 Europe, North Africa and the Mediterranean.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

# SEASONAL CONSIDERATION BY DESTINATION

*Canada is one of the top considerations for Fall (and Summer) travel among French travellers and HEGs, but ranks low on the list for Winter travel.*

| Total France | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|---|---|---|---|---|
| **Australia** (n=310) | 33% | 40% | 33% | 33% |
| **Canada** (n=1109) | 24% | 34% | 43% | 39% |
| **China** (n=209) | 25% | 41% | 39% | 33% |
| **Iceland** (n=300) | 28% | 37% | 43% | 30% |
| **India** (n=204) | 30% | 38% | 28% ↓ | 32% |
| **Japan** (n=312) | 23% | 48% | 38% | 31% |
| **Mexico** (n=276) | 28% | 42% | 31% | 34% |
| **Thailand** (n=297) | 38% | 40% | 30% | 33% |
| **United Arab Emirates** (n=156) | 38% | 37% | 31% | 31% |
| **United States** (n=348) | 26% | 37% ↓ | 43% | 37% |

| HEG Audience | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|---|---|---|---|---|
| **Australia** (n=232) | 33% | 43% | 33% | 35% |
| **Canada** (n=833) | 25% | 34% | 44% | 40% |
| **China** (n=155) | 27% | 40% | 39% | 33% |
| **Iceland** (n=242) | 29% | 37% | 45% | 33% |
| **India** (n=157) | 31% | 39% | 32% ⊕ | 33% |
| **Japan** (n=242) | 25% | 52% ⊕ | 38% | 34% |
| **Mexico** (n=220) | 30% | 40% | 30% | 34% |
| **Thailand** (n=225) | 39% | 42% | 31% | 30% |
| **United Arab Emirates** (n=110) | 39% | 41% | 32% | 36% ⊕ |
| **United States** (n=255) | 29% | 36% | 43% | 38% |

↑ / ↓ = 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 FRANCE

*There is a higher conversion between those who typically travel during the Winter months and interest in taking a trip during a destination's Winter season (77%) compared to Fall travellers and interest in taking a trip during a destination's Fall season (55%). However, Canada's potential to convert those who are extremely interested in travel during a destination's Fall season is stronger than for Winter season.*

## Fall

**49.9%**
Demand During Fall **Months**
(any destination)

**9,708,000**

**55%**

**27.6%**
Extremely Interested in Visiting a Destination During its Fall **Season**
(any destination)

**5,378,000**

**103%**

**38.9%**
Next 2 Year Potential Target Market **for CANADA During Fall Season**

**5,547,000**

## Winter

**30.0%** ↓
Demand During Winter **Months**
(any destination)

**5,845,000**

**77%**

**23.1%**
Extremely Interested in Visiting a Destination During its Winter **Season**
(any destination)

**4,501,500**

**77%**

**24.2%**
Next 2 Year Potential Target Market **for CANADA During Winter Season**

**3,455,000**

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=1513)
D3. In general, how interested are you in taking a holiday trip to a destination during <u>its autumn season</u>? Total (n=761)
D2. In general, how interested are you in taking a holiday trip to a destination during <u>its winter season</u>? Total (n=752)
C7. For each of the following destinations, during which months would you consider taking long-haul trip <u>in the next two years</u>? Total (n=1109)

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

# FALL/WINTER CONVERSION – HEGS

*A similar pattern is true among HEGs in that Canada's potential is stronger for the Fall season, with 4.2M HEGs compared to 2.7M for Winter.*

## Fall

**50.6%**
Demand During Fall **Months**
(any destination)

**7,293,000**

**59%**

**29.7%**
Extremely Interested in
Visiting a Destination During
its Fall **Season**
(any destination)

**4,277,000**

**99%**

**39.6%**
Next 2 Year Potential Target
Market **for CANADA During
Fall Season**

**4,238,500**

## Winter

**30.2%**
Demand During Winter **Months**
(any destination)

**4,346,000**

**81%**

**24.3%**
Extremely Interested in
Visiting a Destination During
its Winter **Season**
(any destination)

**3,501,500**

**76%**

**24.9%**
Next 2 Year Potential Target
Market **for CANADA During
Winter Season**

**2,670,500**

Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEGs
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply (n=1120)
D3. In general, how interested are you in taking a holiday trip to a destination during <u>its autumn season</u>? (n=573)
D2. In general, how interested are you in taking a holiday trip to a destination during <u>its winter season</u>? (n=547)
C7. For each of the following destinations, during which months would you consider taking long-haul trip <u>in the next two years</u>? (n=833)

# UNIQUENESS OF CANADA AS FALL DESTINATION: BY SEGMENTS
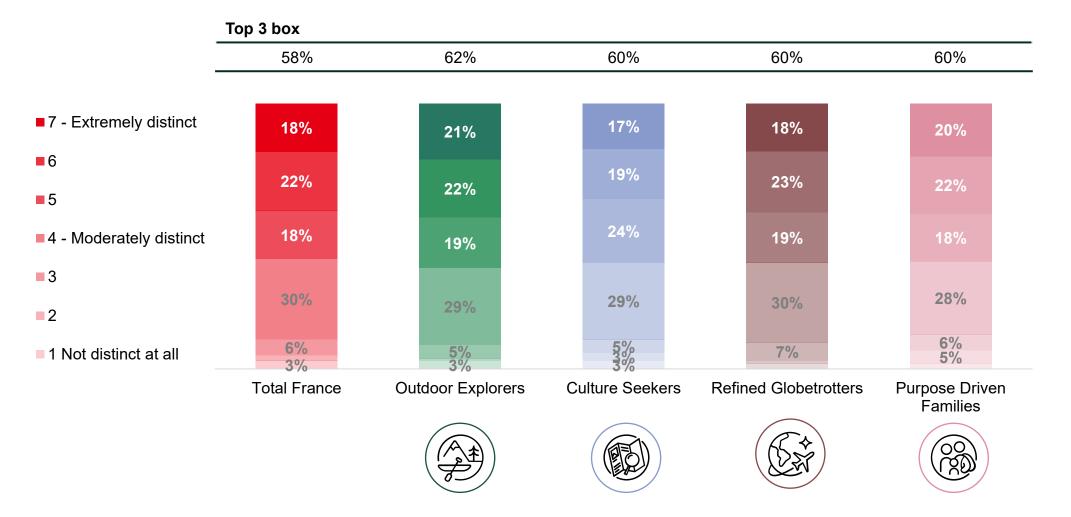
*Over one-half of French travellers perceive Canada as a distinct Fall destination, and this is higher among Purpose Driven Families, followed by Outdoor Explorers and Refined Globetrotters.*

**Top 3 box**

| | Total France | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|---|
| | 56% | 59% | 54% | 59% | 67% |

Legend:
- ■ 7 - Extremely distinct
- ■ 6
- ■ 5
- ■ 4 - Moderately distinct
- ■ 3
- ■ 2
- ■ 1 Not distinct at all

| | Total France | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|---|
| 7 - Extremely distinct | 17% | 19% | 17% | 15% | 28% |
| 6 | 23% | 23% | 23% | 27% | 22% |
| 5 | 17% | 16% | 14% | 17% | 17% |
| 4 - Moderately distinct | 32% | 32% | 33% | 31% | 23% |
| 3 | 6% | 6% | 6% | 5% | 6% |
| 2 | 3% | | 3% | 3% | |
| 1 Not distinct at all | 3% | | 4% | | |

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=761); Outdoor Explorers (n=208); Culture Seekers (n=140); Refined Globetrotters (n=143); Purpose Driven Families (n=82)
E14. How distinct is Canada as an autumn travel destination?

# UNIQUENESS OF CANADA AS WINTER DESTINATION: BY SEGMENTS

**DESTINATION CANADA**

*Almost six in ten French travellers perceive Canada as a distinct Winter destination, and sentiments are similar across all segments.*

**Top 3 box**

| | Total France | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|---|
| | 58% | 62% | 60% | 60% | 60% |

Legend:
- ■ 7 - Extremely distinct
- ■ 6
- ■ 5
- ■ 4 - Moderately distinct
- ■ 3
- ■ 2
- ■ 1 Not distinct at all

**Total France**
- 18%
- 22%
- 18%
- 30%
- 6%
- 3%

**Outdoor Explorers**
- 21%
- 22%
- 19%
- 29%
- 5%
- 3%

**Culture Seekers**
- 17%
- 19%
- 24%
- 29%
- 5%
- 3%

**Refined Globetrotters**
- 18%
- 23%
- 19%
- 30%
- 7%

**Purpose Driven Families**
- 20%
- 22%
- 18%
- 28%
- 6%
- 5%

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=752); Outdoor Explorers (n=198); Culture Seekers (n=150); Refined Globetrotters (n=134); Purpose Driven Families (n=65)
E13. How distinct is Canada as a winter travel destination?

# INDIGENOUS TRAVEL

# FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES: BY SEGMENTS
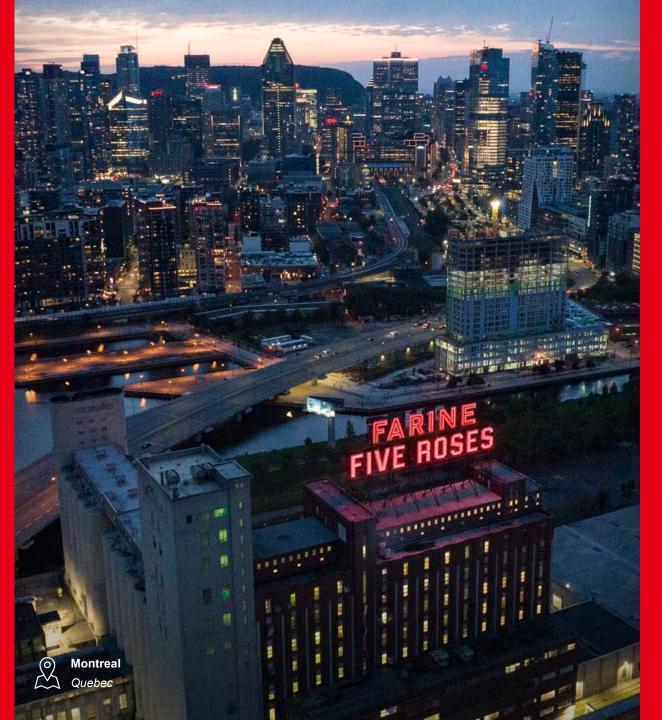
*Safety/comfort, authenticity, and cultural significance are the factors most likely to drive interest in Indigenous experiences. Of note is the particularly high proportion of OEs selecting authenticity and culture significance, and the RGs most likely to select safety and comfort.*

Legend: ■ Outdoor Explorers ■ Culture Seekers ■ Refined Globetrotters ■ Purpose Driven Families

| Factor | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|
| Safety and comfort of the destination | 37% | 32% | 56% | 43% |
| Authenticity of the experiences | 53% | 30% | 44% | 35% |
| Cultural significance and uniqueness | 46% | 39% | 33% | 38% |
| Accessibility and ease of travel | 25% | 27% | 30% | 25% |
| Personal interest in Indigenous cultures | 33% | 35% | 29% | 25% |
| Recommendations and reviews | 17% | 22% | 23% | 21% |
| Smaller group size or intimate experiences | 19% | 20% | 26% | 21% |
| Availability of full-day experiences (6+ hours) | 14% | 12% | 10% | 19% |
| Availability of short experiences (1-3 hours) | 12% | 14% | 9% | 10% |
| Availability of information and marketing | 4% | 10% | 9% | 5% |

# TRAVEL BEHAVIOURS

# GENERAL ACTIVITIES INTERESTED IN

**DESTINATION CANADA**

Top activities on any holiday include nature walks, oceanside beaches, and local markets. In general, HEGs are interested in more activities than the average French traveller.

■ Total France   ■ HEG Audience

| Activity | Total France | HEG Audience |
|---|---|---|
| Nature walks | 60% ↓ | 62% ⊕ |
| Oceanside beaches | 55% ↓ | 52% ⊖ |
| Local markets (e.g. public markets, farmers market, night markets) | 53% ↓ | 54% |
| Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) | 48% ↓ | 49% |
| Hiking | 47% ↓ | 50% ⊕ |
| Nature parks | 45% ↓ | 46% |
| Historical, archaeological or world heritage sites | 43% | 45% ⊕ |
| Trying local food and drink | 43% ↓ | 44% |
| Learning about Indigenous culture, traditions or history | 42% ↓ | 44% ⊕ |
| Fine dining | 34% ↓ | 33% |
| Guided city tours | 34% ↓ | 34% |
| Northern lights | 33% ↓ | 34% ⊕ |
| City green spaces like parks or gardens | 32% ↓ | 34% |
| Lakeside beaches | 31% ↓ | 32% |
| Viewing wildlife or marine life | 31% ↓ | 33% ⊕ |
| Art galleries or museums | 30% ↓ | 31% ⊕ |
| Exploring places most tourists won't go to | 30% ↓ | 34% ⊕ |
| Shopping for items that help me remember my trip | 29% ↓ | 28% |
| Travelling to remote destinations | 28% ↓ | 31% ⊕ |

| Activity | Total France | HEG Audience |
|---|---|---|
| Guided nature tours | 27% ↓ | 29% ⊕ |
| Autumn colours | 26% ↓ | 26% |
| Casual biking | 25% ↓ | 27% ⊕ |
| Nightlife | 23% ↓ | 22% |
| Self-guided driving tours or road trips | 23% ↓ | 25% ⊕ |
| Spring blossoms | 23% | 24% ⊕ |
| Wilderness lodges | 23% ↓ | 25% ⊕ |
| Spa or wellness centres | 22% ↓ | 22% |
| Amusement or theme parks | 21% ↓ | 19% ⊖ |
| Culinary tours or cooking classes | 21% ↓ | 23% ⊕ |
| Guided boat tours | 21% ↓ | 21% |
| Cultural or traditional festivals | 20% ↓ | 22% ⊕ |
| Shopping for clothes and shoes | 20% ↓ | 19% ⊖ |
| Breweries or wineries | 19% ↓ | 20% |
| Camping | 19% | 20% |
| Live shows (e.g. concerts, theatre, opera, symphony, etc.) | 18% ↓ | 20% ⊕ |
| Road cycling | 18% | 18% |
| Kayaking, canoeing or paddle boarding | 17% ↓ | 19% ⊕ |
| Cruises | 16% ↓ | 15% |

| Activity | Total France | HEG Audience |
|---|---|---|
| Food and drink festivals or events | 16% ↓ | 17% |
| Mountain biking | 15% ↓ | 16% ⊕ |
| Music festivals | 15% ↓ | 17% ⊕ |
| Downhill skiing or snowboarding | 14% ↓ | 16% ⊕ |
| Guided train tours | 14% ↓ | 14% |
| Snowshoeing or cross country skiing | 14% ↓ | 15% ⊕ |
| Sporting events (to attend or participate) | 13% ↓ | 13% |
| Agricultural or country farm tours | 12% | 13% ⊕ |
| Guided airplane or helicopter tours | 11% ↓ | 11% |
| Renting a recreational vehicle (RV) | 11% ↓ | 12% ⊕ |
| Winter festivals | 10% ↓ | 11% |
| Comedy festivals | 9% | 9% |
| Fishing or angling | 9% | 11% ⊕ |
| Movie festivals | 9% | 9% |
| Golfing | 7% | 8% ⊕ |
| Shopping for luxury items | 7% | 8% |
| Hunting | 6% | 6% |
| Heli-skiing | 4% | 5% |
| Rodeos | 4% | 5% |

↑ / ↓ = 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=1513); HEG (n=1120)
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

**DESTINATION CANADA**

*The importance of various sustainability efforts vary by segment. Of note, OEs place higher importance on knowing that the local culture of my destination is not negatively impacted by tourism and knowing their money is directly supporting the local community.*



Legend: ■ Outdoor Explorers ■ Culture Seekers ■ Refined Globetrotters ■ Purpose Driven Families

Conservation of natural areas in my destination: Outdoor Explorers 50%, Culture Seekers 39%, Refined Globetrotters 50%, Purpose Driven Families 45%

Knowing that the local community in my destination is open and welcoming to travellers: Outdoor Explorers 34%, Culture Seekers 29%, Refined Globetrotters 31%, Purpose Driven Families 39%

Knowing that the local culture of my destination is not negatively impacted by tourism: Outdoor Explorers 38% (+), Culture Seekers 30%, Refined Globetrotters 33%, Purpose Driven Families 30%

Dining options that use local and/or organic ingredients: Outdoor Explorers 26%, Culture Seekers 27%, Refined Globetrotters 29%, Purpose Driven Families 27%

Knowing that my money is directly supporting the local community: Outdoor Explorers 32% (+), Culture Seekers 28%, Refined Globetrotters 21%, Purpose Driven Families 22%

Efforts to reduce overcrowding in my destination: Outdoor Explorers 27%, Culture Seekers 21%, Refined Globetrotters 28%, Purpose Driven Families 25%

*France GTRP – December 2024*

44

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

# BARRIERS TO SUSTAINABLE TRAVEL

**The biggest barrier to sustainable travel is the lack of information and being expensive, although concern about expense has decreased compared to a year ago.**

Legend: ■ Total France  ■ HEG Audience

| Barrier | Total France | HEG Audience |
|---|---|---|
| There is a lack of information about how to travel sustainably | 40% | 41% |
| Sustainable travel is more expensive | 37% ↓ | 37% |
| Travelling sustainably would limit the types of activities I can do | 22% | 23% |
| Sustainable travel doesn't meet my needs for comfort when travelling | 20% | 18% ⊖ |
| Travelling sustainably is too time consuming | 20% | 21% |
| Sustainable travel doesn't meet my needs for luxury when travelling | 13% | 15% ⊕ |
| None of the above | 15% | 15% |

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**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".

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↑ / ↓ = 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=757); HEG (n=557)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

France GTRP – December 2024      45
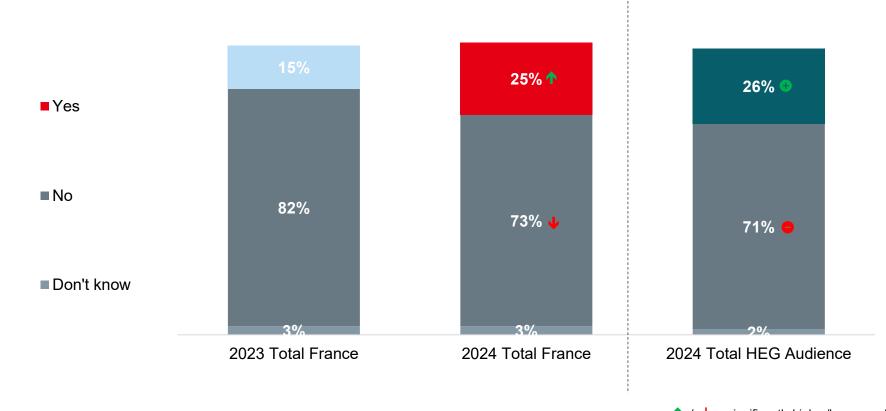
# USAGE OF AI TOOLS TO PLAN TRIPS

*Usage of AI in trip planning has increased compared to last year and is slightly higher among HEGs.*



■ Yes

■ No

■ Don't know

| | 2023 Total France | 2024 Total France | 2024 Total HEG Audience |
|---|---|---|---|
| Yes | 15% | 25% ⬆ | 26% ⊕ |
| No | 82% | 73% ⬇ | 71% ⊖ |
| Don't know | 3% | 3% | 2% |

⬆ / ⬇ = 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=1513); HEG (n=1120)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

# CANADA TRAVEL BARRIERS AND MOTIVATORS

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

**Among all segments, cost is the biggest barrier to travelling to Canada, but less so for CSs. Weather is a bigger barrier for RGs, while OEs are more likely than other HEG segments to say there are other places they would rather visit.**

■ Outdoor Explorers  ■ Culture Seekers  ■ Refined Globetrotters  ■ Purpose Driven Families



| | Cost | Extreme weather conditions | Poor weather | Poor value for money | There is no reason to visit anytime soon | Visa requirements | There are other places I would rather visit | Too far / flight too long | Unfavourable conditions for driving during winter |
|---|---|---|---|---|---|---|---|---|---|
| Outdoor Explorers | 40% | 21% | 16% | 16% | 12% | 14% | 16% | 12% | 12% |
| Culture Seekers | 33% | 17% | 14% | 10% | 12% | 13% | 10% | 9% | 9% |
| Refined Globetrotters | 39% | 27% | 26% | 18% | 14% | 12% | 11% | 10% | 10% |
| Purpose Driven Families | 37% | 20% | 20% | 20% | 11% | 12% | 12% | 12% | 11% |

Base: Long-haul pleasure travellers (past 3 years or next 2 years) Outdoor Explorers (n=406); Culture Seekers (n=290); Refined Globetrotters (n=277); Purpose Driven Families (n=147)
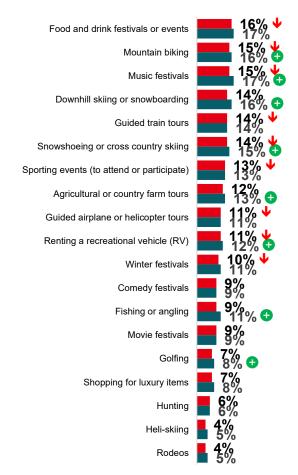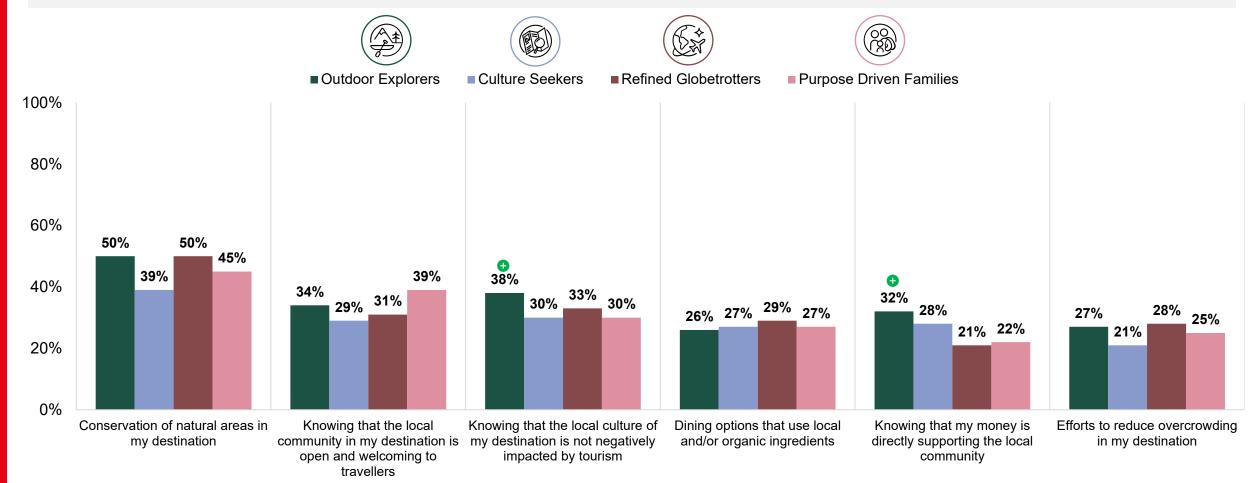E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

*France GTRP – December 2024*   48

➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

# MOTIVATORS & BARRIERS FOR FALL TRAVEL TO CANADA

*The weather being ideal and cheaper travel are the top motivators for travelling to Canada in the Fall months. That said, the weather is also a deterrent for French travellers, with mentions increasing compared to last year.*

## Motivators for Fall Travel

■ 2024 (n=615)  ■ 2023 (n=622)

| Motivator | 2024 | 2023 |
|---|---|---|
| The weather is ideal at the places I want to visit during these months | 41% | 43% |
| Travel prices are cheaper during these months | 36% | 35% |
| There are less crowds at the places I want to visit during these months | 33% | 37% |
| There are places in Canada I'd only want to visit during these months | 31% | 27% |
| I am able to take a holiday during these months | 30% | 29% |
| It's school holidays so I can enjoy a family trip | 17% | 13% |
| There are specific activities I want to do in Canada that are available in these months | 16% | 16% |
| I need to visit for business / work | 6% | n/a |

## Barriers for Fall Travel

■ 2024 (n=494)  ■ 2023 (n=491)

| Barrier | 2024 | 2023 |
|---|---|---|
| The weather is not ideal at the places I want to visit during these months | 24% ↑ | 18% |
| I am unable to take a holiday during these months | 22% | 24% |
| I don't know enough about what activities are available during these months | 15% | 17% |
| My kids are in school and I don't want them to miss class | 15% | 13% |
| Travel prices are more expensive during these months | 15% | 14% |
| There are other places I'd rather visit during these months | 13% | 13% |
| There are too many crowds at the places I want to visit during these months | 10% | 8% |
| The activities I want to do are not available in these months | 9% | 6% |

Base: Those in the dream to purchase stages of the path to purchase for Canada and underline 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 underline 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**?
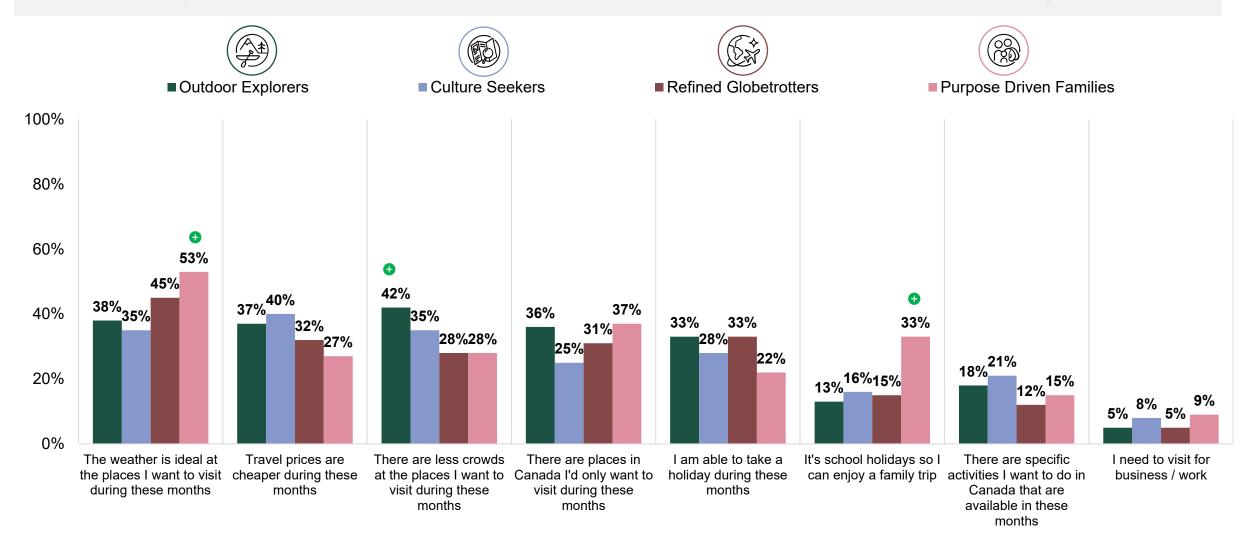
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

# MOTIVATORS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

*OEs are more likely to want to travel to Canada in the Fall because there are less crowds; while the weather is the top reason for RGs.*
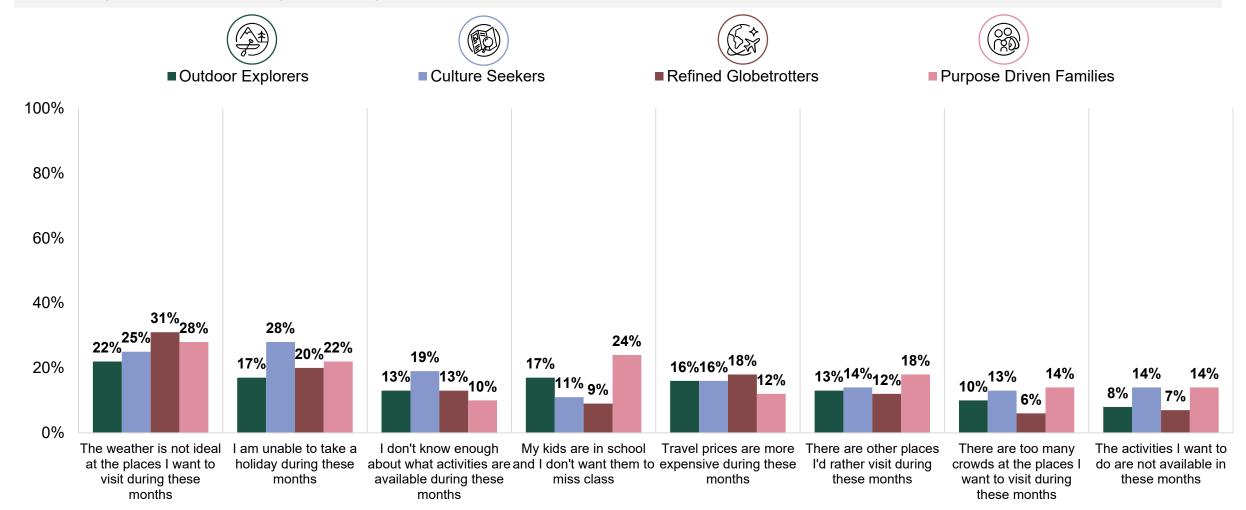


■ Outdoor Explorers  ■ Culture Seekers  ■ Refined Globetrotters  ■ Purpose Driven Families

| | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|
| The weather is ideal at the places I want to visit during these months | 38% | 35% | 45% | 53% (+) |
| Travel prices are cheaper during these months | 37% | 40% | 32% | 27% |
| There are less crowds at the places I want to visit during these months | 42% (+) | 35% | 28% | 28% |
| There are places in Canada I'd only want to visit during these months | 36% | 25% | 31% | 37% |
| I am able to take a holiday during these months | 33% | 28% | 33% | 22% |
| It's school holidays so I can enjoy a family trip | 13% | 16% | 15% | 33% (+) |
| There are specific activities I want to do in Canada that are available in these months | 18% | 21% | 12% | 15% |
| I need to visit for business / work | 5% | 8% | 5% | 9% |

*France GTRP – December 2024*  50

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

# BARRIERS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

**The weather not being ideal and being unable to take a holiday during these months are the top barriers for all segments; although kids being in school ranks higher among PDFs.**



Legend: ■ Outdoor Explorers ■ Culture Seekers ■ Refined Globetrotters ■ Purpose Driven Families

| Barrier | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|
| The weather is not ideal at the places I want to visit during these months | 22% | 25% | 31% | 28% |
| I am unable to take a holiday during these months | 17% | 28% | 20% | 22% |
| I don't know enough about what activities are available during these months | 13% | 19% | 13% | 10% |
| My kids are in school and I don't want them to miss class | 17% | 11% | 9% | 24% |
| Travel prices are more expensive during these months | 16% | 16% | 18% | 12% |
| There are other places I'd rather visit during these months | 13% | 14% | 12% | 18% |
| There are too many crowds at the places I want to visit during these months | 10% | 13% | 6% | 14% |
| The activities I want to do are not available in these months | 8% | 14% | 7% | 14% |

*France GTRP — December 2024*

➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

# MOTIVATORS & BARRIERS FOR WINTER TRAVEL TO CANADA

*Although weather continues to be the biggest barrier to travel during Winter, it also appeals to those who want to travel during the Winter months, along with being able to take a holiday during these months.*

## Motivators for Winter Travel

■ 2024 (n=348)  ■ 2023 (n=365)

| Motivator | 2024 | 2023 |
|---|---|---|
| I am able to take a holiday during these months | 36% ↑ | 26% |
| The weather is ideal at the places I want to visit during these months | 36% | 32% |
| There are places in Canada I'd only want to visit during these months | 33% | 32% |
| There are specific activities I want to do in Canada that are available in these months | 30% | 32% |
| There are less crowds at the places I want to visit during these months | 25% | 26% |
| Travel prices are cheaper during these months | 22% | 24% |
| I need to visit for business / work | 10% | n/a |

## Barriers for Winter Travel

■ 2024 (n=761)  ■ 2023 (n=748)

| Barrier | 2024 | 2023 |
|---|---|---|
| The weather is too cold at the places I want to visit during these months | 40% | 45% |
| Travel prices are more expensive during these months | 18% | 16% |
| There are other places I'd rather visit during these months | 17% | 15% |
| I am unable to take a holiday during these months | 15% | 14% |
| I don't know enough about what activities are available during these months | 11% | 10% |
| My kids are in school and I don't want them to miss class | 10% | 8% |
| The activities I want to do are not available in these months | 9% | 7% |
| There are too many crowds at the places I want to visit during these months | 8% | 6% |

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**?
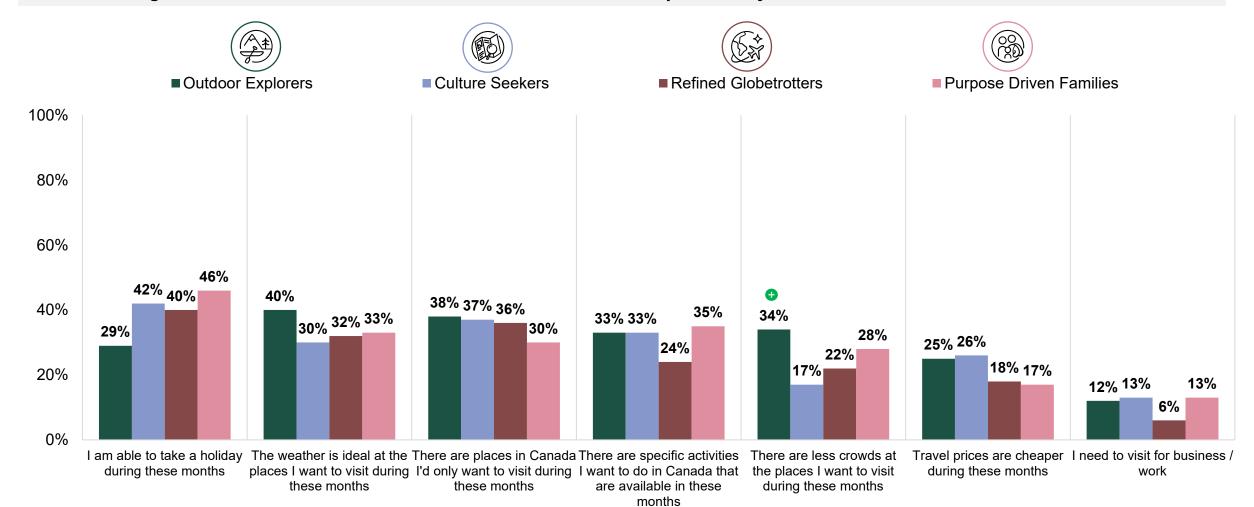
*France GTRP – December 2024*

52

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

# MOTIVATORS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

*While RGs are most motivated because they are able to take a holiday during the Winter months, OEs are more likely to be motivated to travel during the Winter months because of the weather and there are places they want to visit in Canada.*



Legend: ■ Outdoor Explorers ■ Culture Seekers ■ Refined Globetrotters ■ Purpose Driven Families

| | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|
| I am able to take a holiday during these months | 29% | 42% | 40% | 46% |
| The weather is ideal at the places I want to visit during these months | 40% | 30% | 32% | 33% |
| There are places in Canada I'd only want to visit during these months | 38% | 37% | 36% | 30% |
| There are specific activities I want to do in Canada that are available in these months | 33% | 33% | 24% | 35% |
| There are less crowds at the places I want to visit during these months | 34% ⊕ | 17% | 22% | 28% |
| Travel prices are cheaper during these months | 25% | 26% | 18% | 17% |
| I need to visit for business / work | 12% | 13% | 6% | 13% |

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

# BARRIERS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

**Destination Canada**

*The weather being too cold is the top barrier among all segments.*

Legend:
- Outdoor Explorers
- Culture Seekers
- Refined Globetrotters
- Purpose Driven Families



| Barrier | Outdoor Explorers | Culture Seekers | Refined Globetrotters | Purpose Driven Families |
|---|---|---|---|---|
| The weather is too cold at the places I want to visit during these months | 40% | 37% | 46% | 33% |
| Travel prices are more expensive during these months | 19% | 18% | 19% | 22% |
| There are other places I'd rather visit during these months | 20% | 20% | 16% | 20% |
| I am unable to take a holiday during these months | 14% | 18% | 13% | 11% |
| I don't know enough about what activities are available during these months | 13% | 9% | 11% | 6% |
| My kids are in school and I don't want them to miss class | 10% | 7% | 8% | 22% (+) |
| The activities I want to do are not available in these months | 13% | 11% | 6% | 8% |
| There are too many crowds at the places I want to visit during these months | 7% | 8% | 9% | 9% |

*France GTRP – December 2024*

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

# MOST RECENT TRIP

Le Pays de la Sagouine
*New Brunswick*

# MAIN PURPOSE OF RECENT TRIP

*One-half of French travellers to Canada went for a holiday, on par with last year and similar among HEGs. Of note, there has been an increase in combining business / personal reasons compared to last year.*

## Total Travellers to Canada: Trended

- 2024 Travellers to Canada (n=206)
- 2023 Travellers to Canada (n=139)

| Purpose | 2024 | 2023 |
|---|---|---|
| Holiday | 51% | 55% |
| Combined business / personal reasons | 18% ↑ | 6% |
| Visit family and friends | 18% | 23% |
| Education | 5% | 8% |
| Personal event (e.g., wedding, funeral) | 5% | 7% |
| Other | 2% | 1% |

## Total Travellers to Canada vs. HEG Travellers to Canada

- Travellers to Canada (n=206)
- HEG Travellers to Canada (n=175)

| Purpose | Total | HEG |
|---|---|---|
| Holiday | 51% | 52% |
| Combined business / personal reasons | 18% | 19% |
| Visit family and friends | 18% | 18% |
| Education | 5% | 5% |
| Personal event (e.g., wedding, funeral) | 5% | 5% |
| Other | 2% | 1% ⊖ |

↑ / ↓ = 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

*The main purpose of recent trip for travellers to Canada was for leisure but to a lesser degree compared to travellers to other destinations. Trips to Canada were more likely to have combined business / personal reasons.*
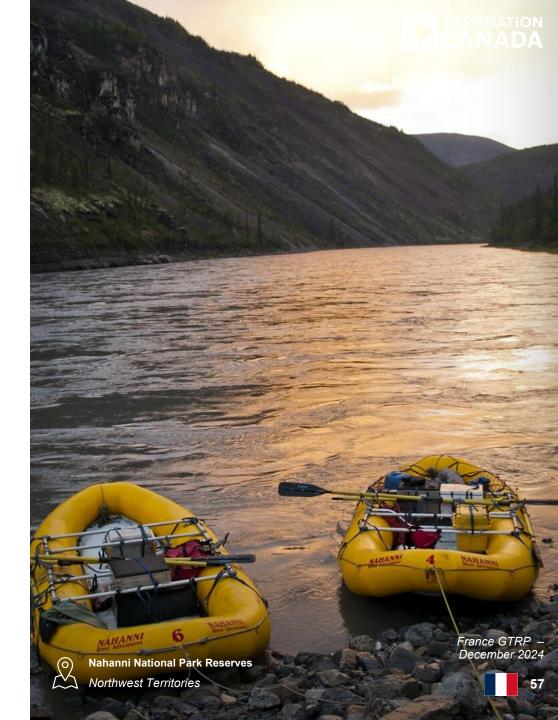
■ Travellers to Canada (n=206)　　■ Travellers to Any Destination (excl. CA) (n=413)

| Category | Travellers to Canada | Travellers to Any Destination (excl. CA) |
|---|---|---|
| Holiday | 51% ⊖ | 66% |
| Combined business / personal reasons | 18% ⊕ | 10% |
| Visit family and friends | 18% | 14% |
| Education | 5% | 3% |
| Personal event (e.g., wedding, funeral) | 5% | 4% |
| Other | 2% | 2% |

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

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



**Nahanni National Park Reserves**
*Northwest Territories*

*France GTRP – December 2024*

57
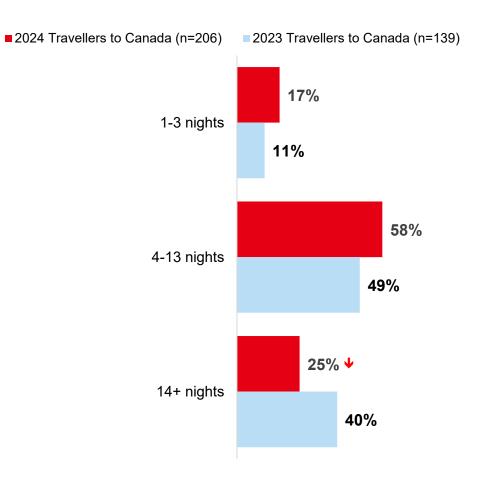
# NIGHTS SPENT DURING RECENT TRIP
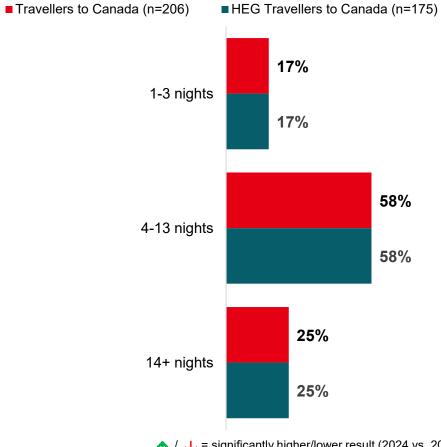
*Almost six in ten spent 4-13 nights in Canada, similar among HEGs. Compared to last year, travellers to Canada were less likely to spend over 14 nights in Canada.*

## Total Travellers to Canada: Trended
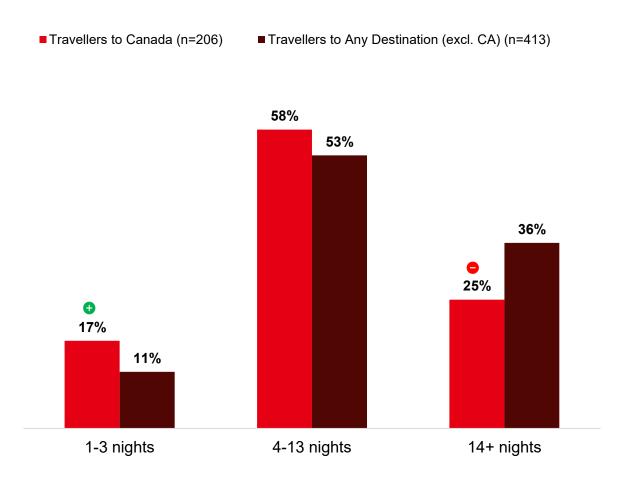
- 2024 Travellers to Canada (n=206)
- 2023 Travellers to Canada (n=139)

| Nights | 2024 | 2023 |
|---|---|---|
| 1-3 nights | 17% | 11% |
| 4-13 nights | 58% | 49% |
| 14+ nights | 25% ↓ | 40% |

## Total Travellers to Canada vs. HEG Travellers to Canada

- Travellers to Canada (n=206)
- HEG Travellers to Canada (n=175)

| Nights | Travellers | HEG |
|---|---|---|
| 1-3 nights | 17% | 17% |
| 4-13 nights | 58% | 58% |
| 14+ nights | 25% | 25% |

↑ / ↓ = 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?
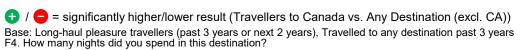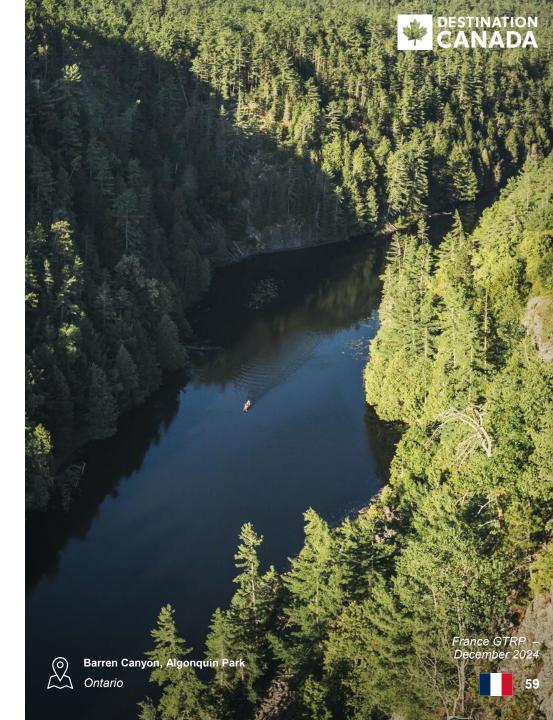
# NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION

**Trips to Canada were shorter than trips to other destinations.**

■ Travellers to Canada (n=206)    ■ Travellers to Any Destination (excl. CA) (n=413)

**1-3 nights**
- ➕ 17%
- 11%

**4-13 nights**
- 58%
- 53%

**14+ nights**
- ➖ 25%
- 36%

➕ / ➖ = 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?

*France GTRP – December 2024*

**Barren Canyon, Algonquin Park**
*Ontario*

59
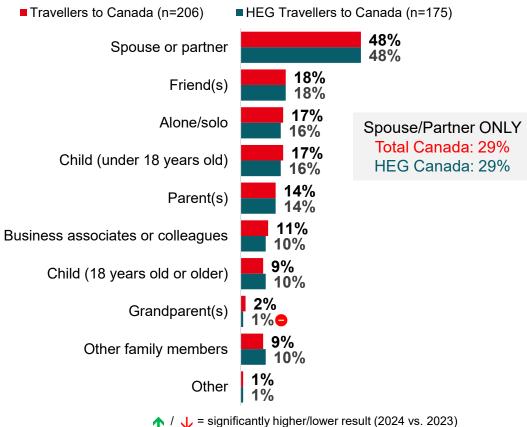
**Almost one-half of travellers to Canada were accompanied by a spouse or partner, which is also the case among HEGs.**

## Total Travellers to Canada: Trended

- ■ 2024 Travellers to Canada (n=206)
- ■ 2023 Travellers to Canada (n=139)

| Category | 2024 | 2023 |
|---|---|---|
| Spouse or partner | 48% | 49% |
| Friend(s) | 18% | 18% |
| Alone/solo | 17% | 19% |
| Child (under 18 years old) | 17% | 22% |
| Parent(s) | 14% | 8% |
| Business associates or colleagues | 11% | 5% |
| Child (18 years old or older) | 9% | 7% |
| Grandparent(s) | 2% | 3% |
| Other family members | 9% | 15% |
| Other | 1% | 1% |

Spouse/Partner ONLY
2024 Total Canada: 29%
2023 Total Canada: 24%

## Total Travellers to Canada vs. HEG Travellers to Canada

- ■ Travellers to Canada (n=206)
- ■ HEG Travellers to Canada (n=175)

| Category | Travellers | HEG |
|---|---|---|
| Spouse or partner | 48% | 48% |
| Friend(s) | 18% | 18% |
| Alone/solo | 17% | 16% |
| Child (under 18 years old) | 17% | 16% |
| Parent(s) | 14% | 14% |
| Business associates or colleagues | 11% | 10% |
| Child (18 years old or older) | 9% | 10% |
| Grandparent(s) | 2% | 1% ⊖ |
| Other family members | 9% | 10% |
| Other | 1% | 1% |

Spouse/Partner ONLY
Total Canada: 29%
HEG Canada: 29%

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

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

*France GTRP – December 2024*

**60**

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

*The majority travelled with their spouse/partner regardless of destination. Increase of business associate or colleagues as companion likely due to increase in combined business/leisure trips.*

■ Travellers to Canada (n=206)　　■ Travellers to Any Destination (excl. CA) (n=413)



| | Travellers to Canada | Travellers to Any Destination (excl. CA) |
|---|---|---|
| Spouse or partner | 48% | 52% |
| Friend(s) | 18% | 16% |
| Alone/solo | 17% | 14% |
| Child (under 18 years old) | 17% | 17% |
| Parent(s) | 14% | 10% |
| Business associates or colleagues | 11% ➕ | 3% |
| Child (18 years old or older) | 9% | 8% |
| Grandparent(s) | 2% | 1% |
| Other family members | 9% | 11% |
| Other | 1% | 1% |

Spouse/Partner ONLY
Travellers to Canada: 29%
Travellers to Any Destination (excl. CA): 31%

➕ / ➖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F5. With whom did you travel on this trip? (Select all that apply)

# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP

*Usage of travel agents and their primary uses cases remain consistent with last year overall. HEGs were more likely to use a travel agent.*

% Used a travel agent
2024 Total Canada: 46%
2023 Total Canada: 44%
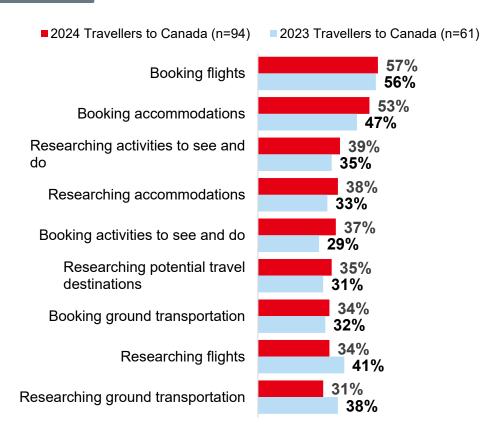
## Total Travellers to Canada: Trended
*Among those who used a travel agent/tour operator*
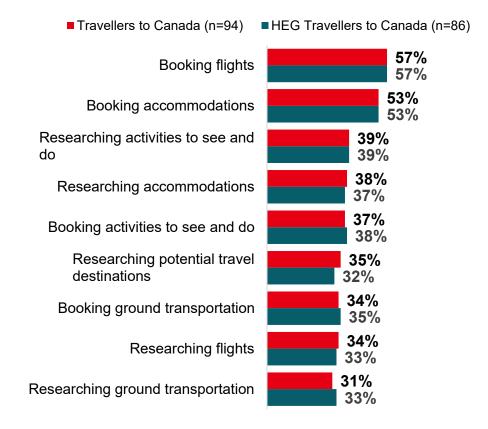
% Used a travel agent
Total Canada: 46%
HEG Canada: 49% ⊕

## Total Travellers to Canada vs. HEG Travellers to Canada
*Among those who used a travel agent/tour operator*

- 🔴 2024 Travellers to Canada (n=94)   🔵 2023 Travellers to Canada (n=61)
- 🔴 Travellers to Canada (n=94)   🟢 HEG Travellers to Canada (n=86)

| Category | 2024 Travellers | 2023 Travellers | | Travellers to Canada | HEG Travellers |
|---|---|---|---|---|---|
| Booking flights | 57% | 56% | | 57% | 57% |
| Booking accommodations | 53% | 47% | | 53% | 53% |
| Researching activities to see and do | 39% | 35% | | 39% | 39% |
| Researching accommodations | 38% | 33% | | 38% | 37% |
| Booking activities to see and do | 37% | 29% | | 37% | 38% |
| Researching potential travel destinations | 35% | 31% | | 35% | 32% |
| Booking ground transportation | 34% | 32% | | 34% | 35% |
| Researching flights | 34% | 41% | | 34% | 33% |
| Researching ground transportation | 31% | 38% | | 31% | 33% |

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 Expedia or Opodo, they do not include online booking engines like Expedia or Opodo. 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 agent or tour operators were used more frequently by travellers to Canada compared to other destinations.*

% Used a travel agent
Travellers to Canada: 46% ➕
Travellers to Any Destination (excl. CA): 37%

■ Travellers to Canada (n=94)  ■ Travellers to Any Destination (excl. CA) (n=153)

| Category | Travellers to Canada | Travellers to Any Destination (excl. CA) |
|---|---|---|
| Booking flights | 57% | 54% |
| Booking accommodations | 53% | 49% |
| Researching activities to see and do | 39% | 37% |
| Researching accommodations | 38% | 39% |
| Booking activities to see and do | 37% | 28% |
| Researching potential travel destinations | 35% | 31% |
| Booking ground transportation | 34% | 29% |
| Researching flights | 34% | 41% |
| Researching ground transportation | 31% | 23% |

➕ / ➖ = 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 Expedia or Opodo, they do not include online booking engines like Expedia or Opodo. 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

*Usage of organized group tours remains consistent with last year for travellers to Canada, with HEGs slightly more likely to use one for at least a part of their trip compared to total travellers to Canada.*

## Total Travellers to Canada: Trended

■ 2024 Travellers to Canada (n=206)    ■ 2023 Travellers to Canada (n=139)

Yes, my whole trip was part of an organized group tour
- 30%
- 31%

Yes, a portion of my trip was part of an organized group tour
- 15%
- 12%

No
- 55%
- 57%

## Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=206)    ■ HEG Travellers to Canada (n=175)

Yes, my whole trip was part of an organized group tour
- 30%
- 33%

Yes, a portion of my trip was part of an organized group tour
- 15%
- 16%

No
- 55%
- 52% ⊖

↑ / ↓ = 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 to engage in organized group tours for at least a portion of their most recent trip compared to those travelling to other destinations.*

■ Travellers to Canada (n=206)   ■ Travellers to Any Destination (excl. CA) (n=413)

| Category | Travellers to Canada | Travellers to Any Destination (excl. CA) |
|---|---|---|
| Yes, my whole trip was part of an organized group tour | 30% | 24% |
| Yes, a portion of my trip was part of an organized group tour | 15% | 11% |
| No | 55% ⊖ | 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
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?



Saskatoon
*Saskatchewan*

*France GTRP – December 2024*
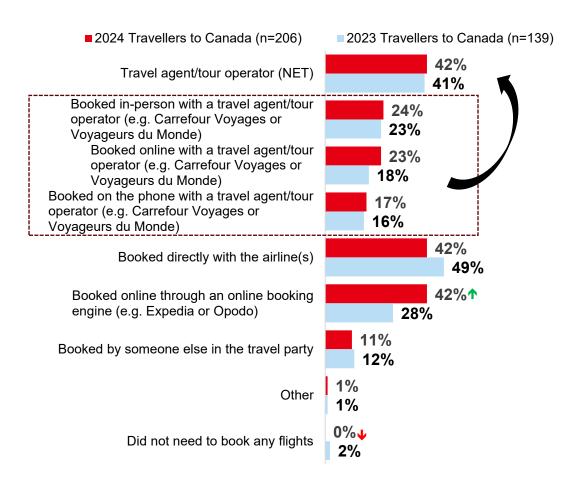
# BOOKING FLIGHTS FOR RECENT TRIP
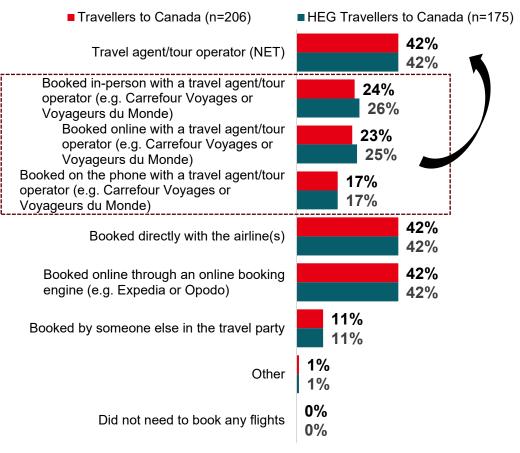
**Using a travel agent or tour operators, booking directly with the airline or through an online booking engine are the most popular methods for booking flights, with usage of an online booking engine increasing significantly compared to last year.**

## Total Travellers to Canada: Trended

- ■ 2024 Travellers to Canada (n=206)
- ■ 2023 Travellers to Canada (n=139)

| Method | 2024 | 2023 |
|---|---|---|
| Travel agent/tour operator (NET) | 42% | 41% |
| Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 24% | 23% |
| Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 23% | 18% |
| Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 17% | 16% |
| Booked directly with the airline(s) | 42% | 49% |
| Booked online through an online booking engine (e.g. Expedia or Opodo) | 42%↑ | 28% |
| Booked by someone else in the travel party | 11% | 12% |
| Other | 1% | 1% |
| Did not need to book any flights | 0%↓ | 2% |

## Total Travellers to Canada vs. HEG Travellers to Canada

- ■ Travellers to Canada (n=206)
- ■ HEG Travellers to Canada (n=175)

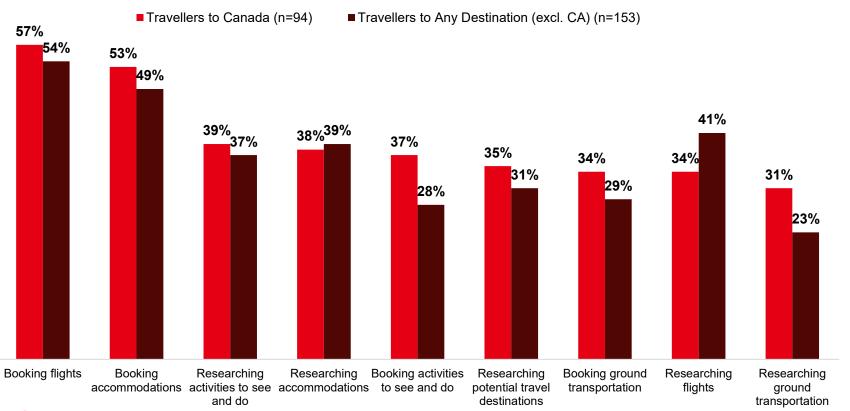| Method | Travellers | HEG |
|---|---|---|
| Travel agent/tour operator (NET) | 42% | 42% |
| Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 24% | 26% |
| Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 23% | 25% |
| Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 17% | 17% |
| Booked directly with the airline(s) | 42% | 42% |
| Booked online through an online booking engine (e.g. Expedia or Opodo) | 42% | 42% |
| Booked by someone else in the travel party | 11% | 11% |
| Other | 1% | 1% |
| Did not need to book any flights | 0% | 0% |

↑ / ↓ = 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 online through an online booking engine or travel agent or tour operator, or via someone else in the travel party.**



■ Travellers to Canada (n=206)  ■ Travellers to Any Destination (excl. CA) (n=413)

| Category | Travellers to Canada | Travellers to Any Destination (excl. CA) |
|---|---|---|
| Travel agent/tour operator (NET) | 42% | 37% |
| Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 24% | 19% |
| Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 23% ⊕ | 17% |
| Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 17% | 12% |
| Booked directly with the airline(s) | 42% | 39% |
| Booked online through an online booking engine (e.g. Expedia or Opodo) | 42% ⊕ | 27% |
| Booked by someone else in the travel party | 11% ⊕ | 6% |
| Other | 1% | 3% |
| Did not need to book any flights | 0% ⊖ | 4% |

⊕ / ⊖ = 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 <u>flight</u> for this trip? (Select all that apply)

*France GTRP – December 2024*

**Montmorency Falls Park, Quebec City**
*Quebec*

# BOOKING ACCOMMODATIONS FOR RECENT TRIP

*There was an increase in recent travellers to Canada who booked through an online booking engine or directly with the accommodation business. Among HEGs, travel agents or tour operators is the most used method to book accommodations.*

## Total Travellers to Canada: Trended

- 2024 Travellers to Canada (n=206)
- 2023 Travellers to Canada (n=139)

| Method | 2024 | 2023 |
|---|---|---|
| Booked online through an online booking engine (e.g. Expedia or Opodo) | 36% ↑ | 22% |
| Travel agent/tour operator (NET) | 35% | 39% |
| Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 20% | 18% |
| Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 18% | 13% |
| Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 14% | 18% |
| Booked directly with the lodging/accommodation establishment | 30% ↑ | 20% |
| Booked through accommodation sharing services website (e.g. Airbnb) | 25% | 27% |
| Booked through a visitors information centre at the destination | 13% | 12% |
| Booked by someone else in the travel party | 6% | 8% |
| Other | 4% | 3% |
| Did not need to book any accommodation | 7% ↓ | 16% |

## Total Travellers to Canada vs. HEG Travellers to Canada

- Travellers to Canada (n=206)
- HEG Travellers to Canada (n=175)

| Method | Travellers | HEG |
|---|---|---|
| Booked online through an online booking engine (e.g. Expedia or Opodo) | 36% | 37% |
| Travel agent/tour operator (NET) | 35% | 38% ⊕ |
| Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 20% | 21% |
| Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 18% | 20% |
| Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 14% | 15% |
| Booked directly with the lodging/accommodation establishment | 30% | 31% |
| Booked through accommodation sharing services website (e.g. Airbnb) | 25% | 28% ⊕ |
| Booked through a visitors information centre at the destination | 13% | 14% |
| Booked by someone else in the travel party | 6% | 6% |
| Other | 4% | 4% |
| Did not need to book any accommodation | 7% | 6% |

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

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

*France GTRP – December 2024*

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

*Travellers to Canada were more likely to book through an online booking engine, directly with the establishment, or through a visitor information centre, compared to travellers to other destinations.*

■ Travellers to Canada (n=206)    ■ Travellers to Any Destination (excl. CA) (n=413)



| Category | Travellers to Canada | Travellers to Any Destination (excl. CA) |
|---|---|---|
| Booked online through an online booking engine (e.g. Expedia or Opodo) | 36% + | 26% |
| Travel agent/tour operator (NET) | 35% | 32% |
| Booked in-person with a travel agent/ tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 20% | 15% |
| Booked online with a travel agent/ tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 18% | 13% |
| Booked on the phone with a travel agent/ tour operator (e.g. Carrefour Voyages or Voyageurs du Monde) | 14% | 10% |
| Booked directly with the lodging/ accommodation establishment | 30% + | 19% |
| Booked through accommodation sharing services website (e.g. Airbnb) | 25% | 20% |
| Booked through a visitors information centre at the destination | 13% + | 7% |
| Booked by someone else in the travel party | 6% | 8% |
| Other | 4% | 5% |
| Did not need to book any accommodation | 7% | 7% |

+ / − = 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 mid-priced hotels/motels slightly softened compared to last year, while stays at luxury hotels has increased significantly in 2024.*

## Total Travellers to Canada: Trended

■ 2024 Travellers to Canada (n=192)   ■ 2023 Travellers to Canada (n=115)

| Accommodation | 2024 | 2023 |
|---|---|---|
| Luxury hotel | 32% ↑ | 15% |
| Mid-priced hotel / motel | 30% | 37% |
| Rented house, apartment or condominium (e.g., Airbnb) | 29% | 29% |
| Bed & Breakfast (B&B) | 19% | 16% |
| Budget hotel / motel | 19% | 17% |
| Home of friends or relatives | 15% | 16% |
| Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering) | 13% | 12% |
| Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.) | 13% | 13% |
| All-inclusive resort | 12% | 8% |
| Guest ranch, farm, or lodge | 11% | 13% |
| Hostel, university or school dormitory | 11% | 9% |
| Camping or trailer park | 9% | 9% |
| Own cottage or second home | 9% | 7% |
| Other | 3% | 2% |

## Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=192)   ■ HEG Travellers to Canada (n=165)

| Accommodation | Travellers | HEG |
|---|---|---|
| Luxury hotel | 32% | 31% |
| Mid-priced hotel / motel | 30% | 30% |
| Rented house, apartment or condominium (e.g., Airbnb) | 29% | 30% |
| Bed & Breakfast (B&B) | 19% | 18% |
| Budget hotel / motel | 19% | 18% |
| Home of friends or relatives | 15% | 16% |
| Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering) | 13% | 16% ⊕ |
| Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.) | 13% | 14% |
| All-inclusive resort | 12% | 13% |
| Guest ranch, farm, or lodge | 11% | 12% |
| Hostel, university or school dormitory | 11% | 11% |
| Camping or trailer park | 9% | 10% |
| Own cottage or second home | 9% | 10% |
| Other | 3% | 3% |

↑ / ↓ = 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)

*France GTRP – December 2024*

# TYPE OF ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

*Travellers to Canada were more likely to stay at a variety of different types of accommodations compared to travellers to other destinations. Mid-priced hotels/motels were the most popular among travellers to other destinations.*

■ Travellers to Canada (n=192)   ■ Travellers to Any Destination (excl. CA) (n=384)



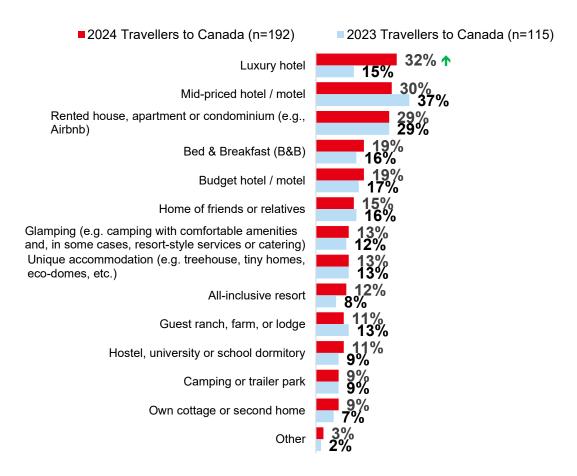| | Luxury hotel | Mid-priced hotel / motel | Rented house, apartment or condominium (e.g., Airbnb) | Bed & Breakfast (B&B) | Budget hotel / motel | Home of friends or relatives | Glamping | Unique accommodation | All-inclusive resort | Guest ranch, farm, or lodge | Hostel, university or school dormitory | Camping or trailer park | Own cottage or second home | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Travellers to Canada | 32% | 30% | 29% | 19% | 19% | 15% | 13% | 13% | 12% | 11% | 11% | 9% | 9% | 3% |
| Travellers to Any Destination | 23% | 40% | 18% | 10% | 18% | 10% | 7% | 9% | 5% | 5% | 5% | 4% | 5% | 4% |

# RECENT TRIP TO CANADA

# CANADIAN DESTINATIONS VISITED DURING RECENT TRIP

*France travellers were most likely to have visited Quebec on their most recent trip, followed by Ontario, Alberta and BC.*

**Northwest Territories**
| | | |
|---|---|---|
| 1% | 1% | |
| 1% | 1% | Yellowknife |
| 1% | 1% | Inuvik |
| -% | -% | Other – NWT |

**Nunavut**
| | | |
|---|---|---|
| 2% | 3% | |
| 1% | 2% | Iqaluit |
| 2% | 2% | Other – NU |

**Quebec**
| | | |
|---|---|---|
| 62% | 62% | |
| 52% | 51% | Montréal |
| 47% | 47% | Québec City |
| 20% | 21% | Mont Tremblant |
| 21% | 19% | Other – QC |

**Yukon**
| | | |
|---|---|---|
| 3% | 4% | |
| 2% | 2% | Whitehorse |
| 1% | 2% | Dawson City |
| -% | 1% | Other – YT |

**Newfoundland & Labrador**
| | | |
|---|---|---|
| 9% | 10% | |
| 7% | 8% | St. John's |
| 4% | 5% | Other - NL |

**British Columbia**
| | | |
|---|---|---|
| 20% | 21% | |
| 10% | 11% | Rocky Mountains |
| 15% | 17% | Vancouver |
| 8% | 7% | Victoria |
| 8% | 7% | Whistler |
| 5% | 5% | Okanagan |
| 3% | 3% | Other – BC |

**Prince Edward Island**
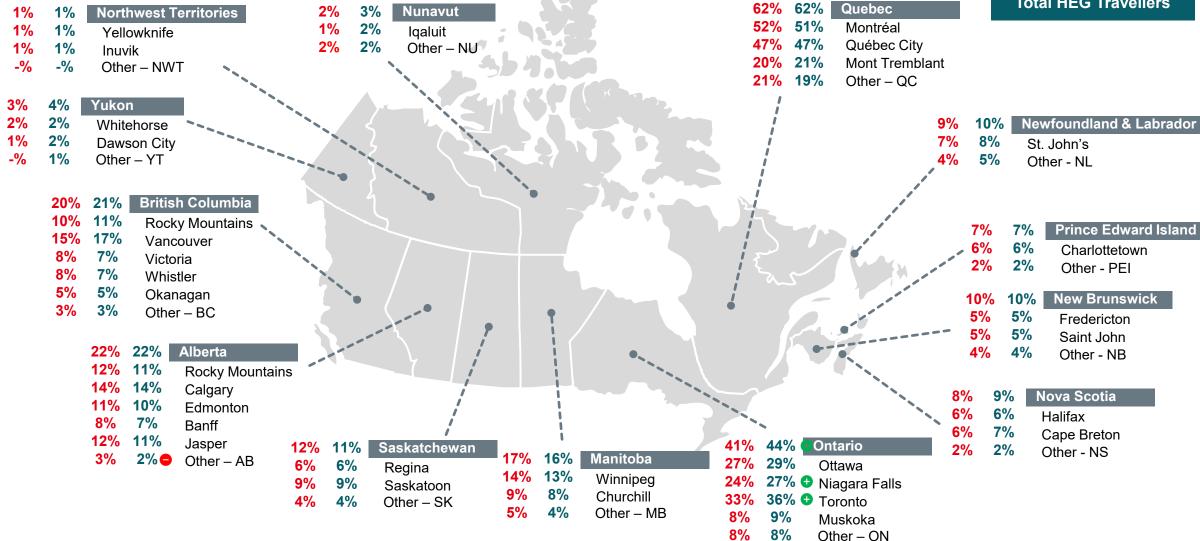| | | |
|---|---|---|
| 7% | 7% | |
| 6% | 6% | Charlottetown |
| 2% | 2% | Other - PEI |

**New Brunswick**
| | | |
|---|---|---|
| 10% | 10% | |
| 5% | 5% | Fredericton |
| 5% | 5% | Saint John |
| 4% | 4% | Other - NB |

**Alberta**
| | | |
|---|---|---|
| 22% | 22% | |
| 12% | 11% | Rocky Mountains |
| 14% | 14% | Calgary |
| 11% | 10% | Edmonton |
| 8% | 7% | Banff |
| 12% | 11% | Jasper |
| 3% | 2% ⊖ | Other – AB |

**Nova Scotia**
| | | |
|---|---|---|
| 8% | 9% | |
| 6% | 6% | Halifax |
| 6% | 7% | Cape Breton |
| 2% | 2% | Other - NS |

**Saskatchewan**
| | | |
|---|---|---|
| 12% | 11% | |
| 6% | 6% | Regina |
| 9% | 9% | Saskatoon |
| 4% | 4% | Other – SK |

**Manitoba**
| | | |
|---|---|---|
| 17% | 16% | |
| 14% | 13% | Winnipeg |
| 9% | 8% | Churchill |
| 5% | 4% | Other – MB |

**Ontario**
| | | |
|---|---|---|
| 41% | 44% ⊕ | |
| 27% | 29% | Ottawa |
| 24% | 27% ⊕ | Niagara Falls |
| 33% | 36% ⊕ | Toronto |
| 8% | 9% | Muskoka |
| 8% | 8% | Other – ON |

*France GTRP – December 2024*

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

# CANADIAN DESTINATIONS VISITED DURING RECENT TRIP: BY KEY CANADIAN CITIES VISITED
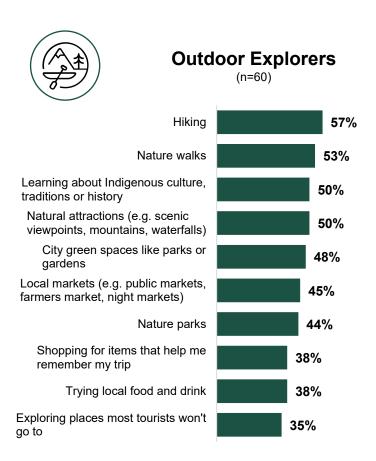
*France travellers that recently travelled to Canada visited were most likely to also visit Ontario or Quebec on the same trip.*
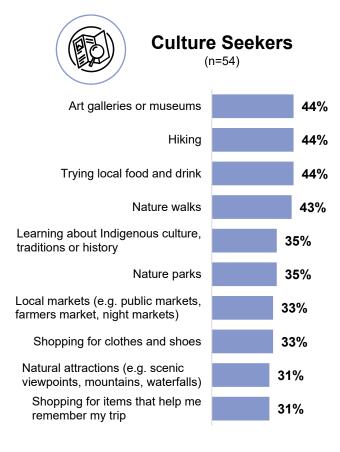
| | Canadian Cities Visited on Most Recent Trip | | | |
|---|---|---|---|---|
| | Vancouver (n=53) | Calgary (n=44*) | Toronto (n=109) | Montreal (n=180) |
| British Columbia | 100% | 39% | 18% | 13% |
| Alberta | 28% | 100% | 16% | 11% |
| Saskatchewan | 15% | 13% | 12% | 4% |
| Manitoba | 18% | 38% | 14% | 8% |
| Ontario | 35% | 37% | 100% | 44% |
| Quebec | 48% | 34% | 65% | 100% |
| New Brunswick | 6% | 7% | 11% | 6% |
| Nova Scotia | 16% | 10% | 11% | 7% |
| Prince Edward Island | 7% | 14% | 8% | 5% |
| Newfoundland & Labrador | 18% | 13% | 11% | 4% |
| Yukon | 11% | 7% | 7% | 2% |
| Northwest Territories | 4% | 4% | 1% | 1% |
| Nunavut | 2% | - | 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)
*Small base size, interpret with caution (n<50)

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

*Nature-focused activities are prominent among OEs and RGs, while art galleries or museums and trying local food/drink also rank high among CSs.*
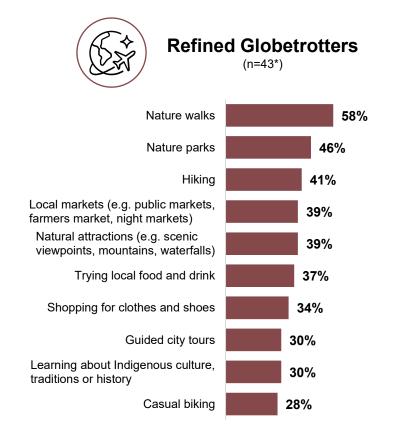
## Outdoor Explorers
(n=60)

| Activity | % |
|---|---|
| Hiking | 57% |
| Nature walks | 53% |
| Learning about Indigenous culture, traditions or history | 50% |
| Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) | 50% |
| City green spaces like parks or gardens | 48% |
| Local markets (e.g. public markets, farmers market, night markets) | 45% |
| Nature parks | 44% |
| Shopping for items that help me remember my trip | 38% |
| Trying local food and drink | 38% |
| Exploring places most tourists won't go to | 35% |

## Culture Seekers
(n=54)

| Activity | % |
|---|---|
| Art galleries or museums | 44% |
| Hiking | 44% |
| Trying local food and drink | 44% |
| Nature walks | 43% |
| Learning about Indigenous culture, traditions or history | 35% |
| Nature parks | 35% |
| Local markets (e.g. public markets, farmers market, night markets) | 33% |
| Shopping for clothes and shoes | 33% |
| Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) | 31% |
| Shopping for items that help me remember my trip | 31% |

## Refined Globetrotters
(n=43*)

| Activity | % |
|---|---|
| Nature walks | 58% |
| Nature parks | 46% |
| Hiking | 41% |
| Local markets (e.g. public markets, farmers market, night markets) | 39% |
| Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) | 39% |
| Trying local food and drink | 37% |
| Shopping for clothes and shoes | 34% |
| Guided city tours | 30% |
| Learning about Indigenous culture, traditions or history | 30% |
| Casual biking | 28% |

*Purpose Driven Families base size too small to report (n=18**)*

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

# THANK YOU

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