

# 2025 GLOBAL TRAVELLER RESEARCH PROGRAM

## AUSTRALIA HIGHLIGHT REPORT



Canada



Yellowknife Northwest Territories



CANADIAN TOURISM DATA  
COLLECTIVE

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# STUDY OVERVIEW: AUSTRALIA MARKET



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

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

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




**Timing of Fieldwork**

**November 24<sup>th</sup> –  
December 5<sup>th</sup> 2025**



**Geographical Definition  
for Qualified Trips**

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



**Sample Distribution**

<b>Sample distribution:</b>	<b>National</b>
<b>Highly Engaged Guest (HEG) Audience:</b>	<b>1092</b>
<b>Other travellers:</b>	<b>413</b>
<b>Total sample size:</b>	<b>1505</b>

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



Canada continues to be a leading international destination among Australian travellers, with next 2-year immediate potential for Canada being 4.1M. The current geopolitical climate has also aided in Canada's popularity among Australian travellers, with 35% stating that they are more likely to visit Canada as a result.



Summer is the most popular time of year for potential visitors to Canada, followed by fall and spring, with the majority of potential visitors interested in Ontario and BC.



Australian travellers are most likely to base an entire holiday around nature attractions, nature walks, local cuisine, oceanside beaches, or visiting historical, archaeological, or world heritage sites.



Canada ranks third as a top of mind Indigenous Destination for Australian travellers. There is a high level of interest in Indigenous culture among Australian travellers; safety and comfort of the destination, followed by accessibility and ease of travel would increase their interest in Indigenous cultural experiences.



While the use of AI has increased for Australian travellers of all ages compared to 2024, almost one half still used a travel agent for their most recent trip to Canada. Australian travellers were most likely to book flights and accommodations for their most recent trip through a travel agent or tour operator.

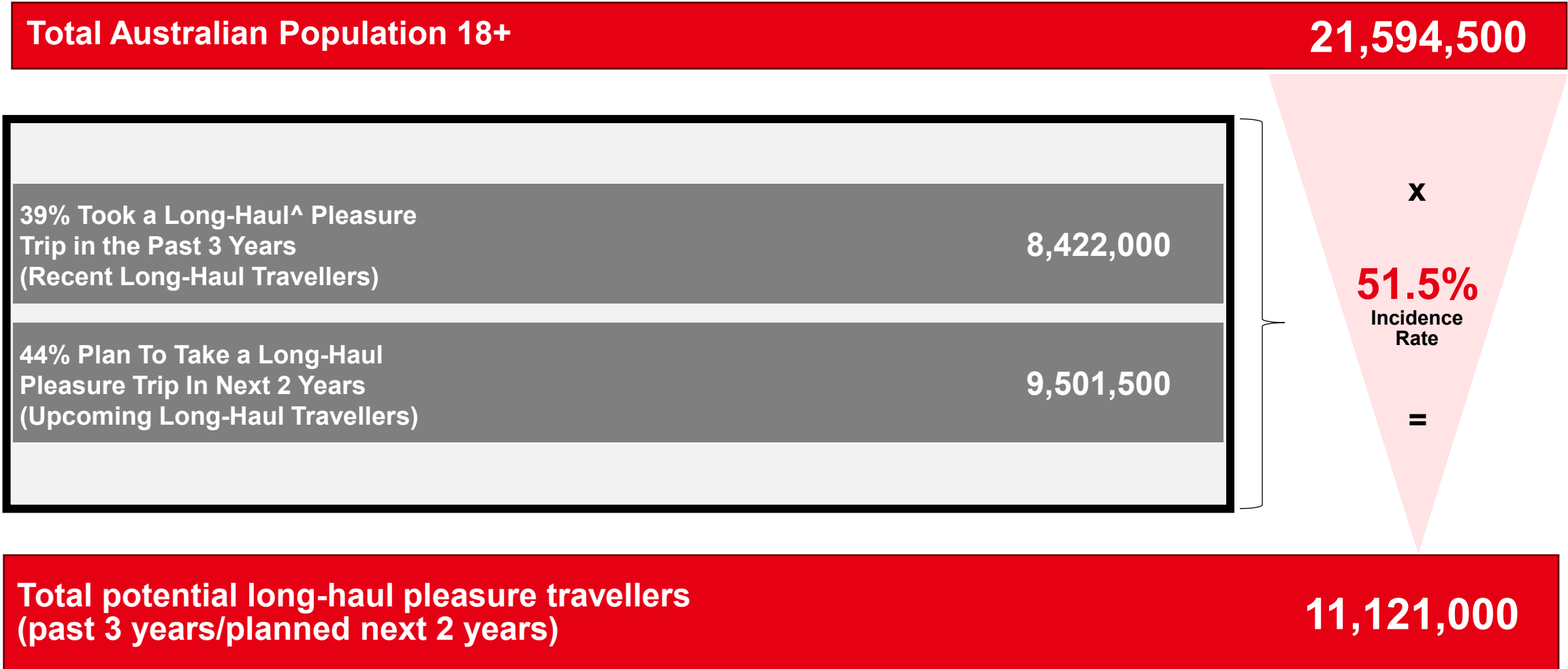
# MARKET SIZING



Killarney Provincial Park  
Ontario

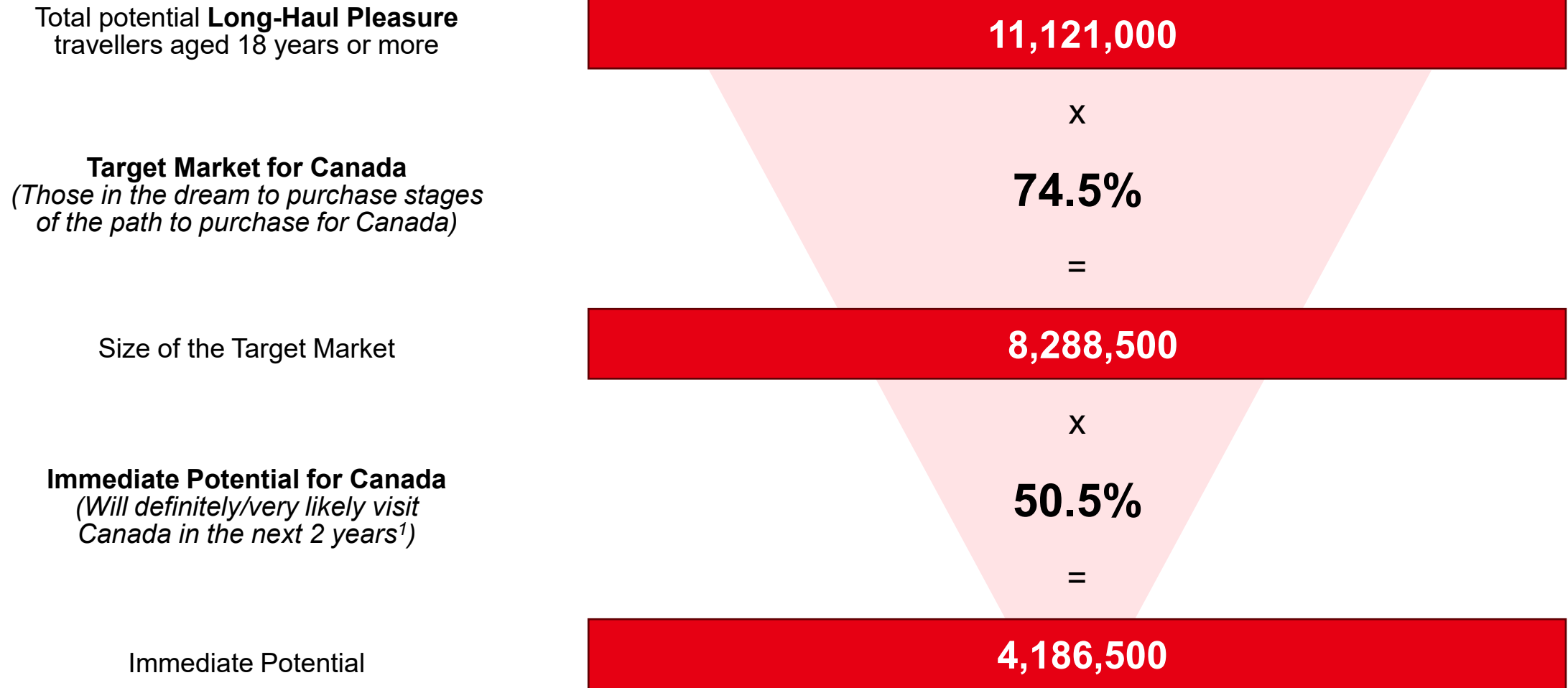


# MARKET SIZING – LONG-HAUL TRAVELLERS



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

# POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



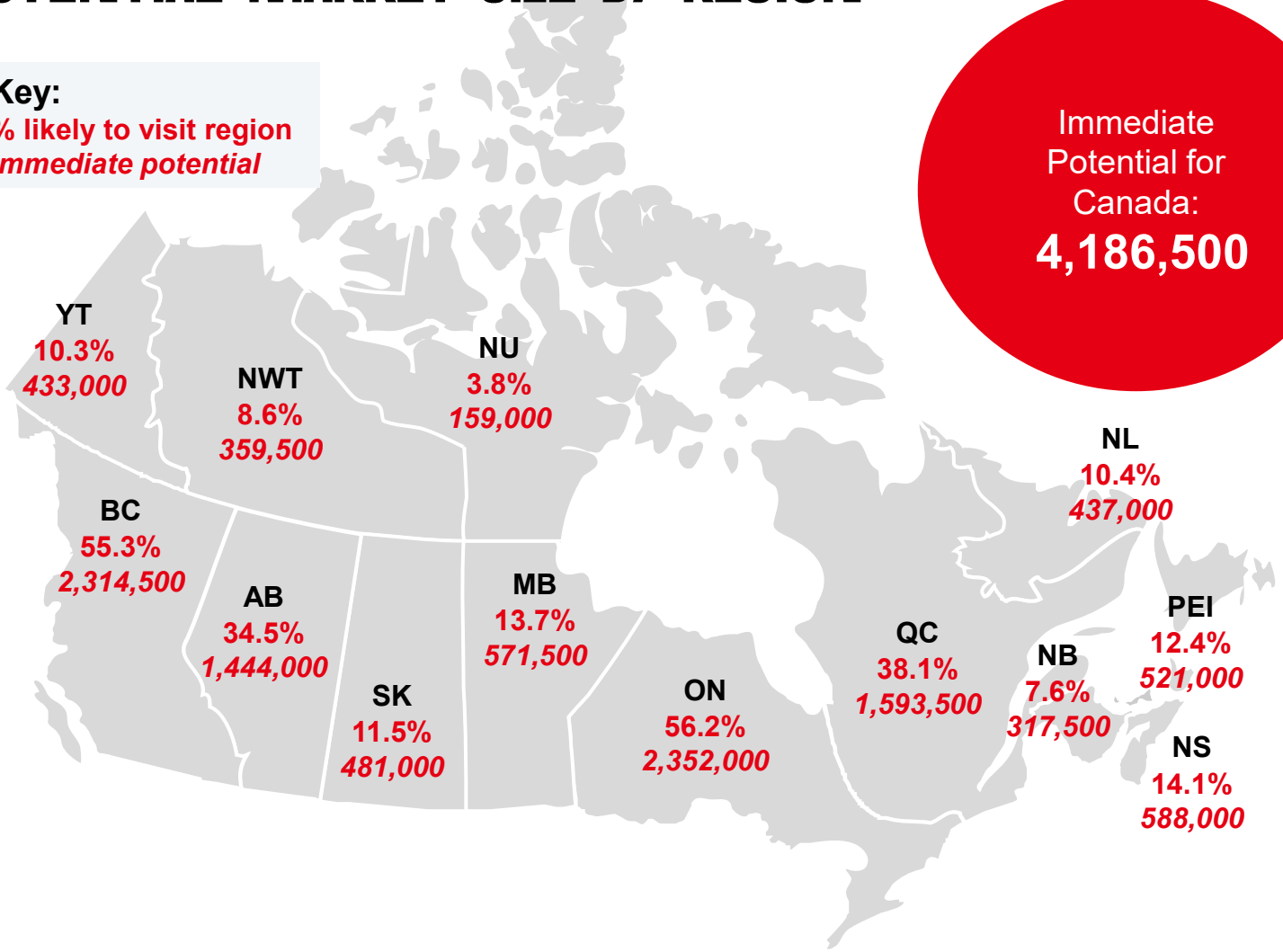
<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1505); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1122)  
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)  
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

# POTENTIAL MARKET SIZE BY REGION

Ontario and BC have the potential to draw in over 2.3 million Australian travellers each over the next 2 years.

Immediate Potential for Canada:  
**4,186,500**

**Key:**  
% likely to visit region  
*Immediate potential*



Nunavut

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1122)  
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

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

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	13%	17%	23%	18%
Alberta	6%	11%	15%	10%
Saskatchewan	2%	4%	5%	3%
Manitoba	4%	4%	5%	4%
Ontario	13%	14%	22%	19%
Quebec	9%	10%	17%	12%
New Brunswick	2%	3%	4%	2%
Nova Scotia	2%	4%	6%	4%
Prince Edward Island	2%	4%	5%	3%
Newfoundland & Labrador	2%	3%	4%	3%
Yukon	3%	3%	4%	3%
Northwest Territories	2%	3%	3%	2%
Nunavut	1%	1%	1%	1%



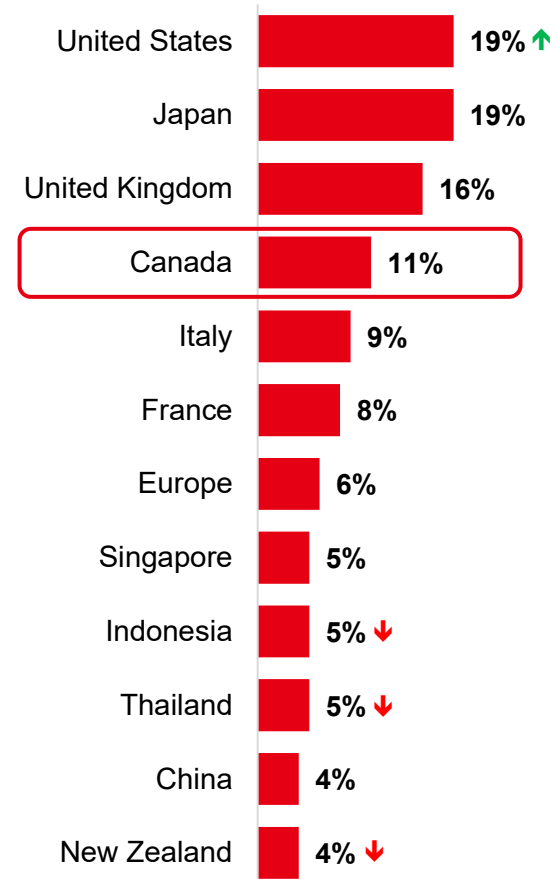
**Australian travellers show a strong preference for summer, while fall and spring are also popular.**

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1122) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

# CONSIDERING CANADA AS A TRAVEL DESTINATION

# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>

On an unaided basis, Canada ranks fourth as a destination Australian travellers are considering, behind the US, Japan, and the UK. While Canada's scores have remained stable, scores for the US have increased compared to 2024.

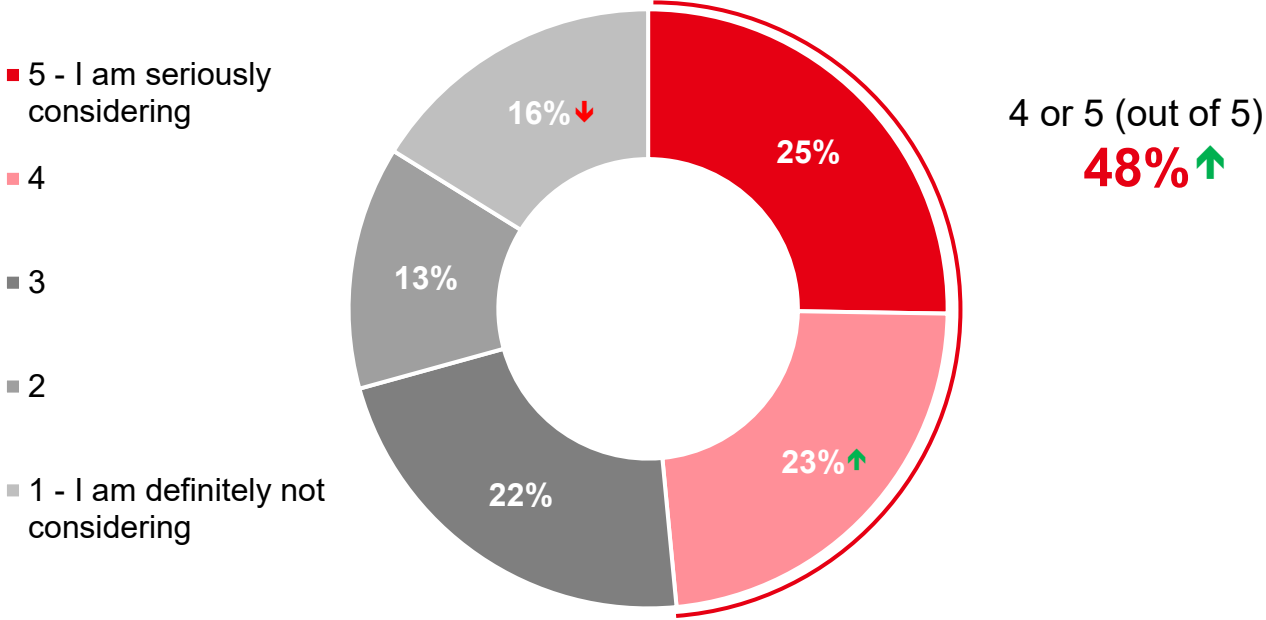


<sup>1</sup> Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1505)  
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)



# AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



**Almost one half of Australian travellers are considering travelling to Canada in the next 2 years, increasing significantly compared to a year ago.**

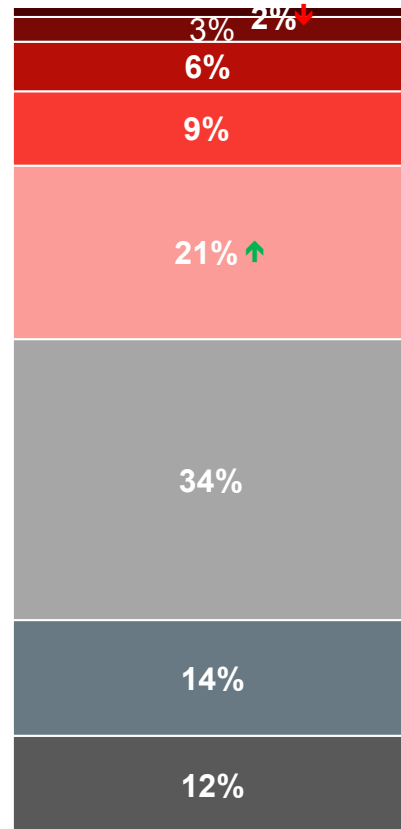


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1505)  
C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years?  
Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

# STAGE IN THE PURCHASE CYCLE FOR CANADA

- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



Actively Planning trip to Canada **20%↑**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=1505)  
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)

Two in ten Australian travellers are actively planning a trip to Canada, increasing significantly compared to 2024.

Lake Louise  
Alberta

Australia GTRP –  
December 2025



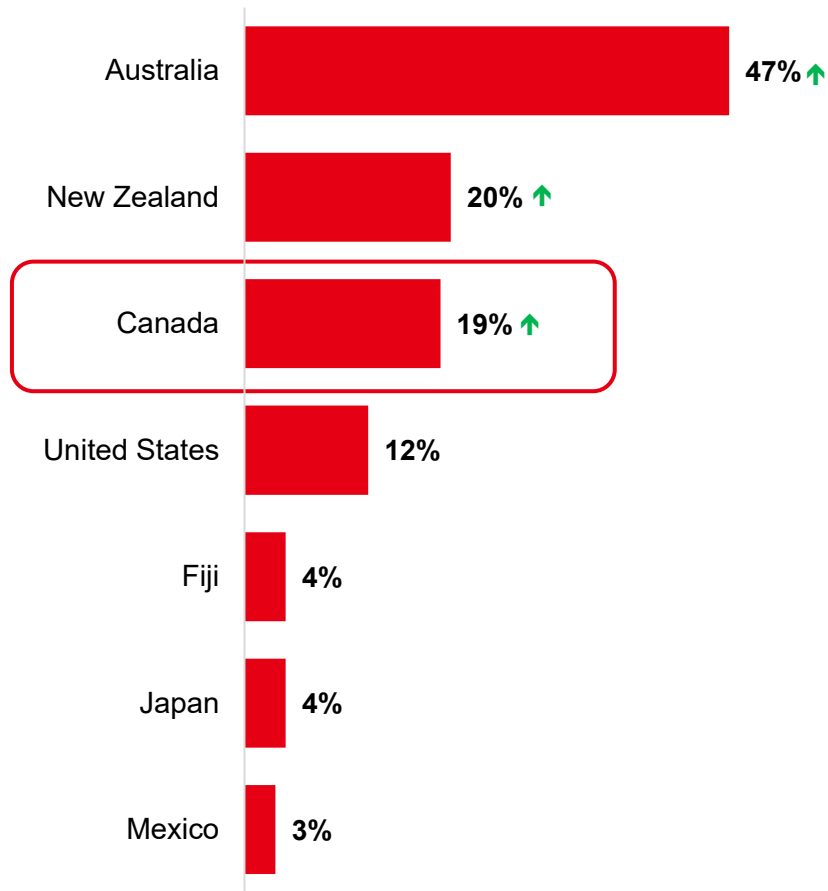
# INDIGENOUS TRAVEL



Carcross  
Yukon



# UNAIDED INDIGENOUS DESTINATION



On an unaided basis, Canada ranks third when thinking of Indigenous tourism destinations, with significantly more mentions compared to a year ago.



Manitoulin Island  
Ontario

Australia GTRP –  
December 2025

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1505)  
 B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Australia, New Zealand and the Pacific Islands.)  
 [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

# INTEREST IN CANADA AS AN INDIGENOUS DESTINATION



Almost six in ten Australian travellers are interested in participating in Indigenous experiences in Canada, with three in ten being very interested.



Kelowna  
British Columbia

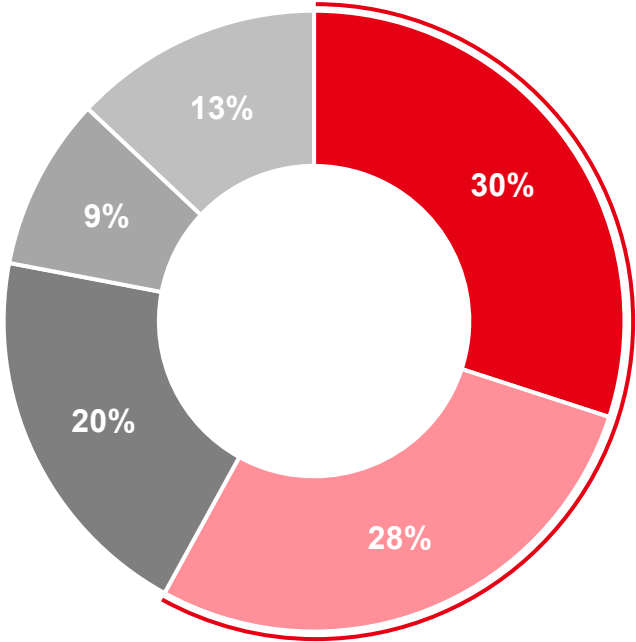
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)  
**58%**

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=766)  
 C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?  
 ↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

# FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

**Safety and ease of travel are the primary drivers of interest in Indigenous cultural experiences, while authenticity and cultural significance remain important but have declined year over year.**



Victoria  
British Columbia

\*\*New statement added in 2025  
 Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=739)  
 C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

# TRAVEL BEHAVIOURS

FARINE  
FIVE ROSES



Montreal  
Quebec



# TOP 10 TRIP ANCHORS ACTIVITIES

27%

Natural Attractions

16%

Food and Drink Festivals or Events

21%

Nature Walks

15%

Nature Parks

21%

Trying Local Food and Drink

14%

Cultural or Traditional Festivals

20%

Historical, Archaeological, or World Heritage Sites

14%

Northern Lights

20%

Oceanside beaches

14%

Viewing Wildlife or Marine Life



**Australian travellers are most likely to base an entire holiday around nature attractions, nature walks, local cuisine, oceanside beaches, or visiting historical, archaeological, or world heritage sites.**



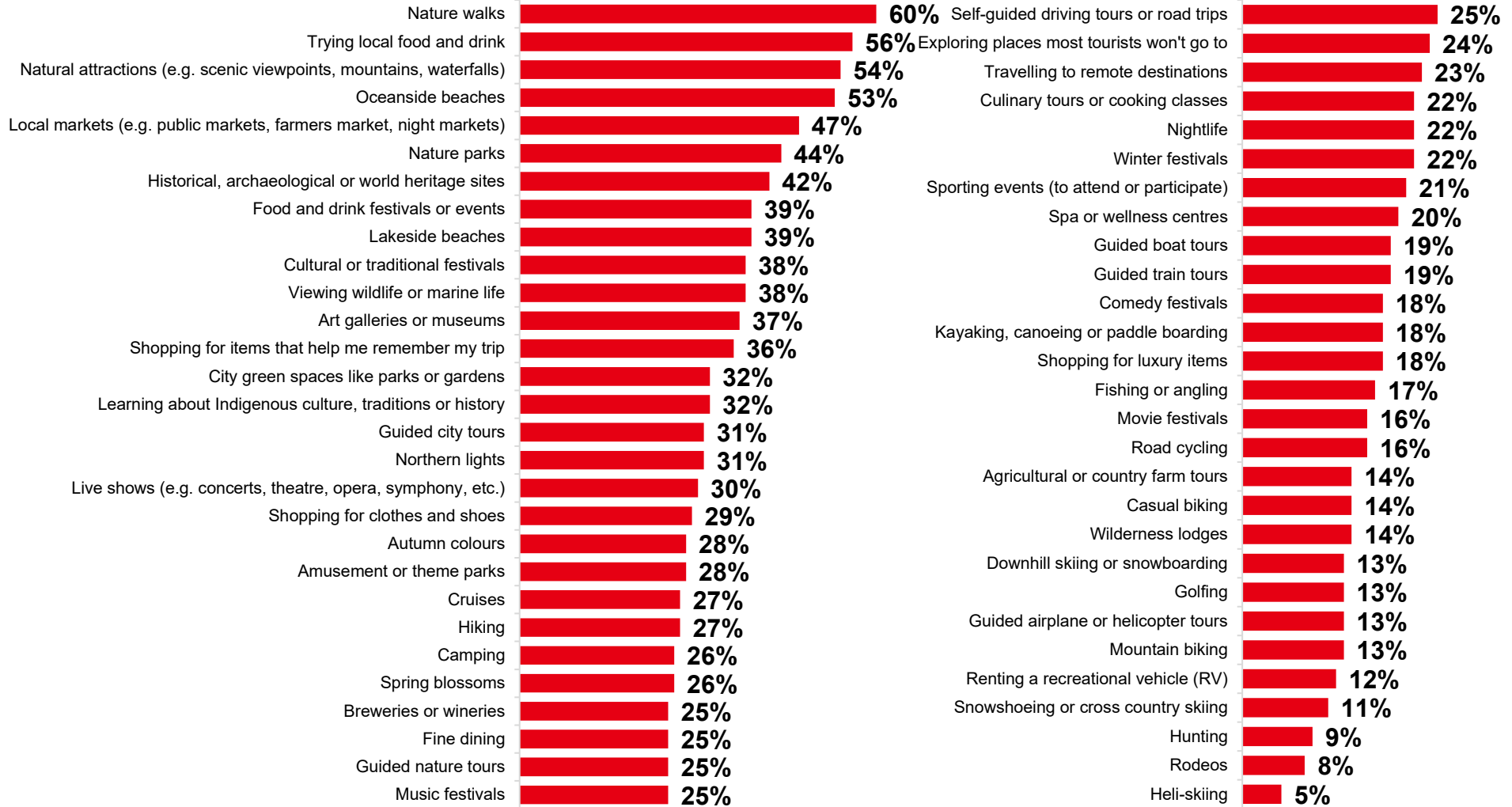
Winnipeg  
Manitoba

Australia GTRP –  
December 2025



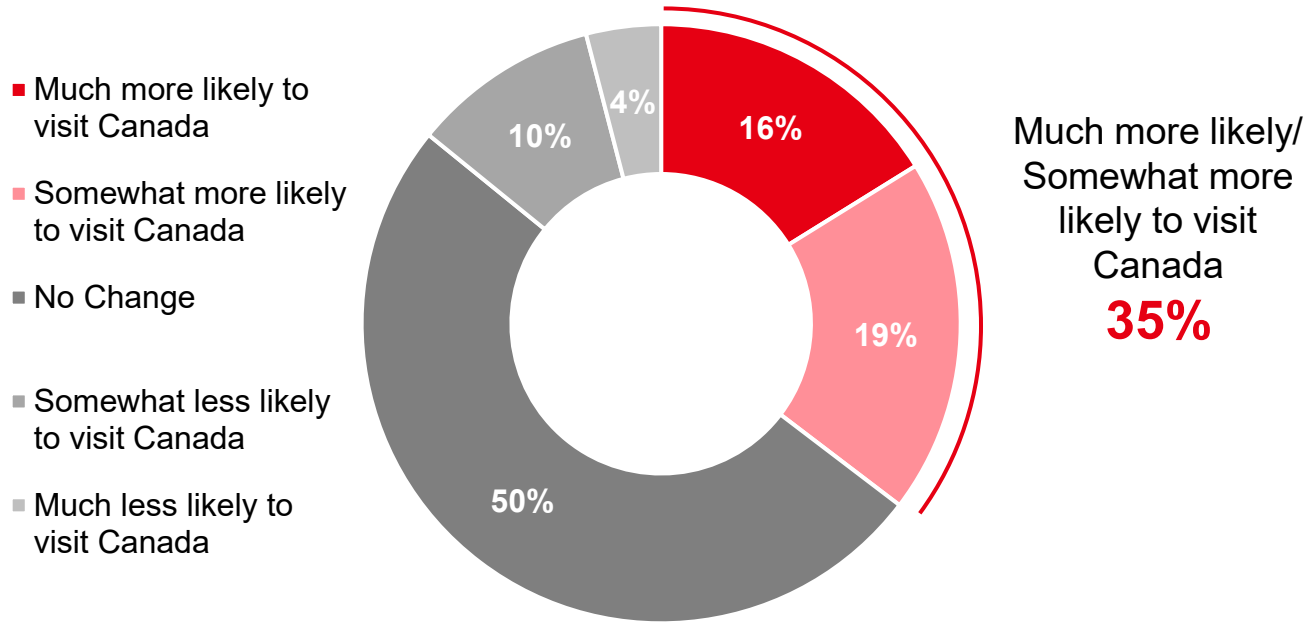
# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

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



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1505)  
 D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

# STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



## Geopolitical Climate Description

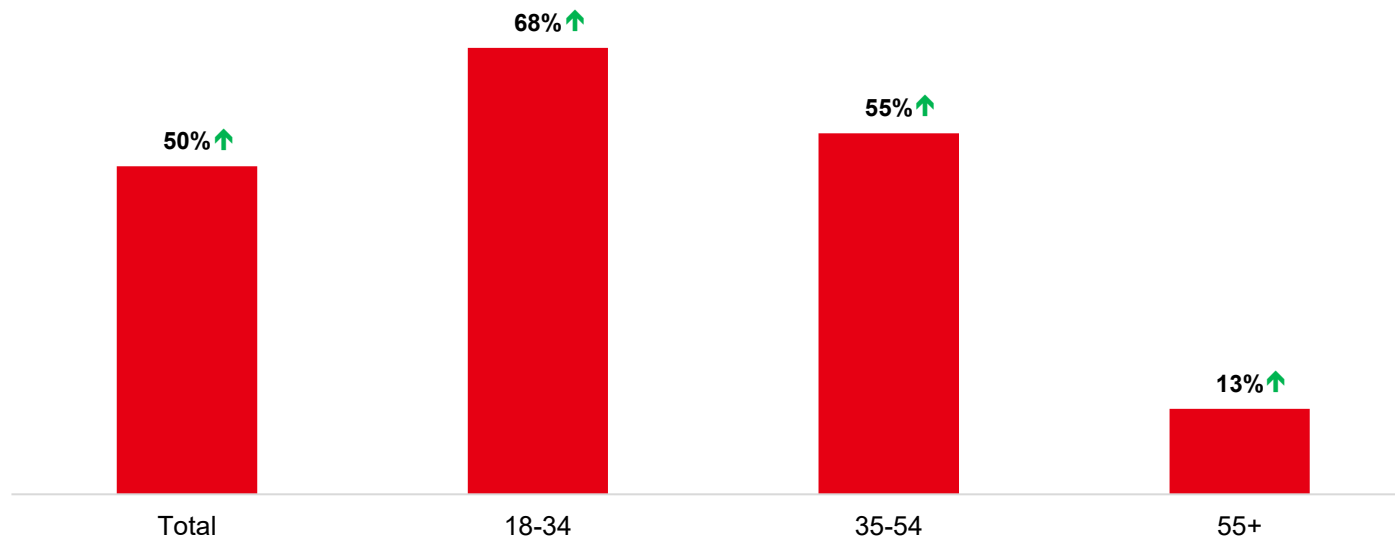
Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=756)  
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?

**Over three in ten Australian travellers feel that the geopolitical climate would make them more likely to visit Canada.**



# USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



**One half of Australian travellers have used AI during at least one phase of their trip planning or booking, with usage increasing across all age groups compared to last year.**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) 2025 (n=1505); 2025 18-34 (n=574); 2025 35-54 (n=557); 2025 55+ (n=374)  
 D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?



Montmorency Falls Park, Quebec City  
 Quebec

Australia GTRP –  
 December 2025



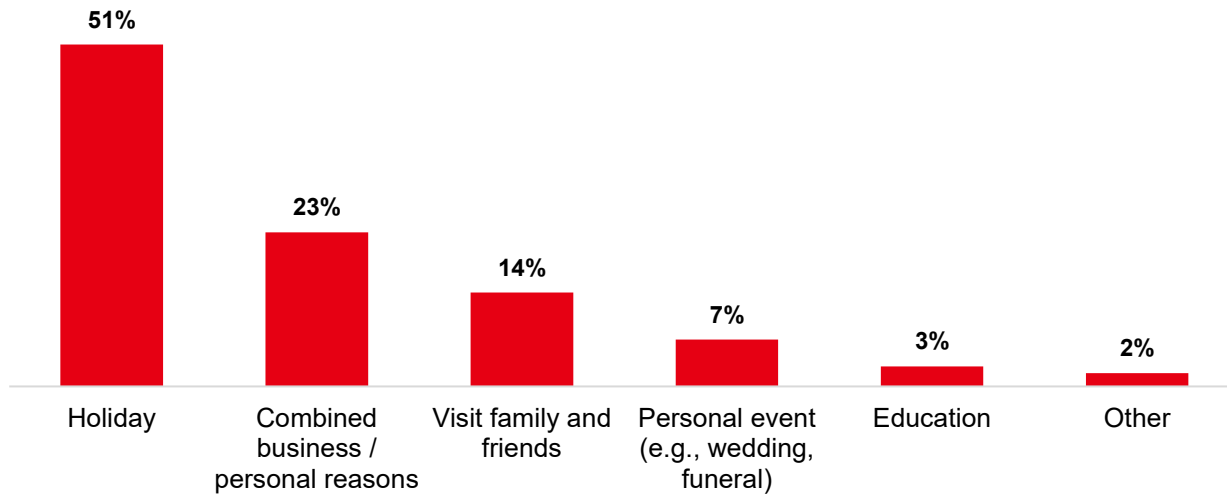
# MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine  
New Brunswick



# MAIN PURPOSE OF RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=260)  
 F2. What was the main purpose of this trip? (Select one)



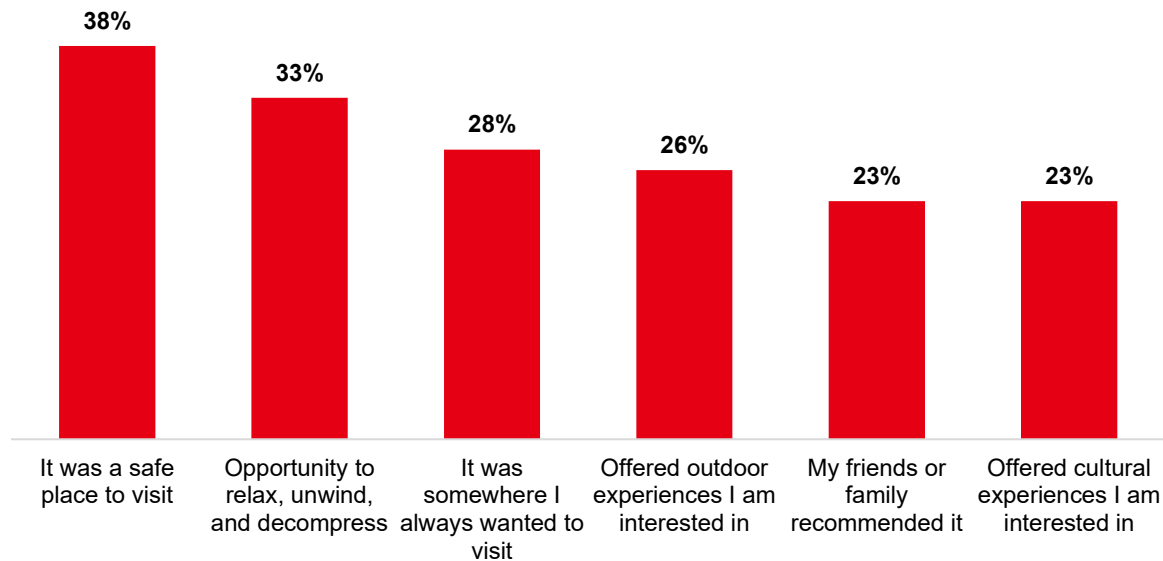
**Holidays continue to be the dominant purpose for Australian travellers to Canada in the past 3 years.**



Nahanni National Park Reserves  
 Northwest Territories

Australia GTRP –  
 December 2025

# FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



**Australian travellers tend to choose Canada because it's a safe place to visit and for the opportunity to relax.**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years Took a holiday (n=133)  
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

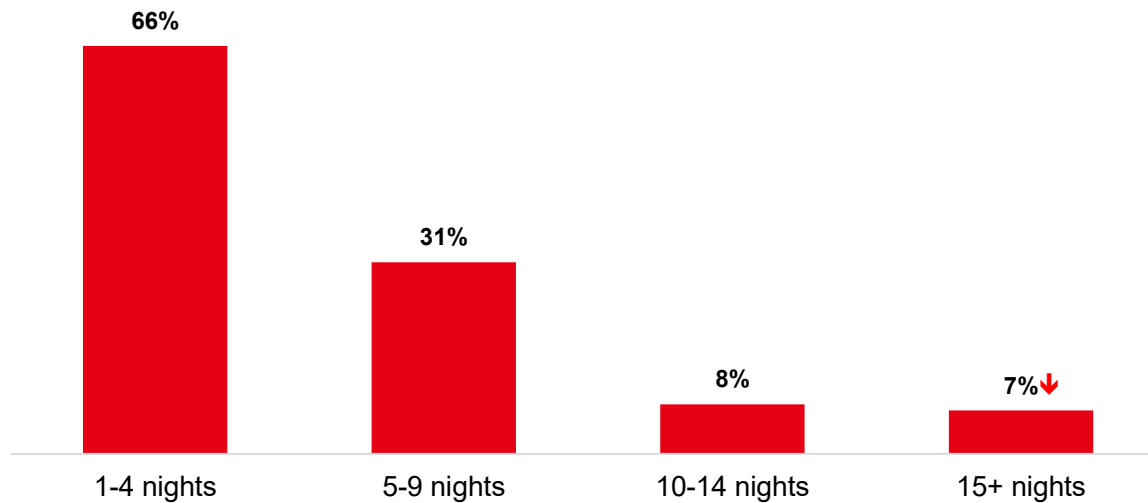


Fundy Trail Provincial Park  
New Brunswick

Australia GTRP –  
December 2025



# NIGHTS SPENT DURING RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=260)  
F4. How many nights did you spend in this destination?

**Trips to Canada longer than two weeks are on the decline, with staying 1-4 nights being the most common.**



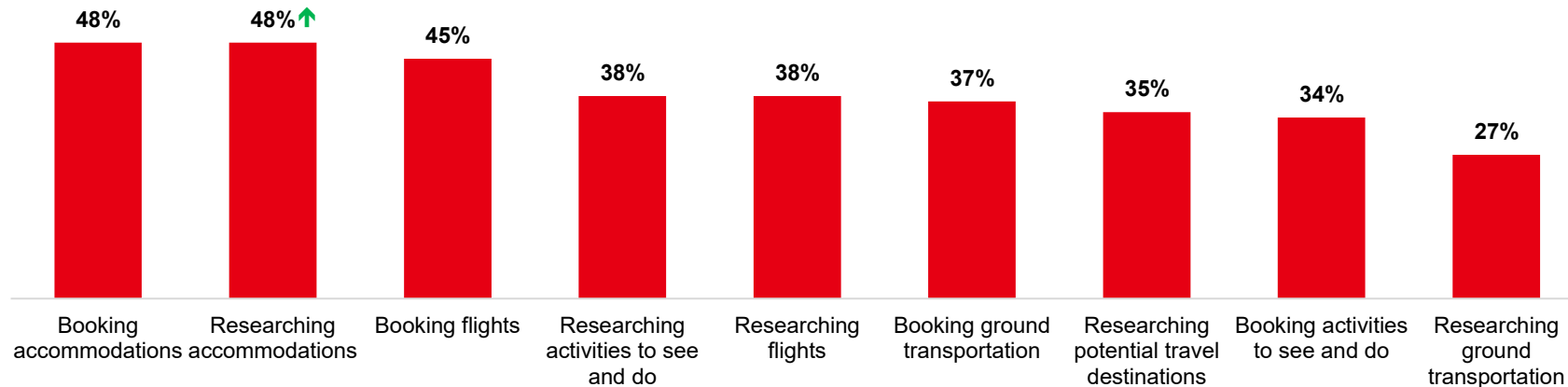
Barren Canyon, Algonquin Park  
Ontario

Australia GTRP –  
December 2025



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

**63%** used a travel agent



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=164)

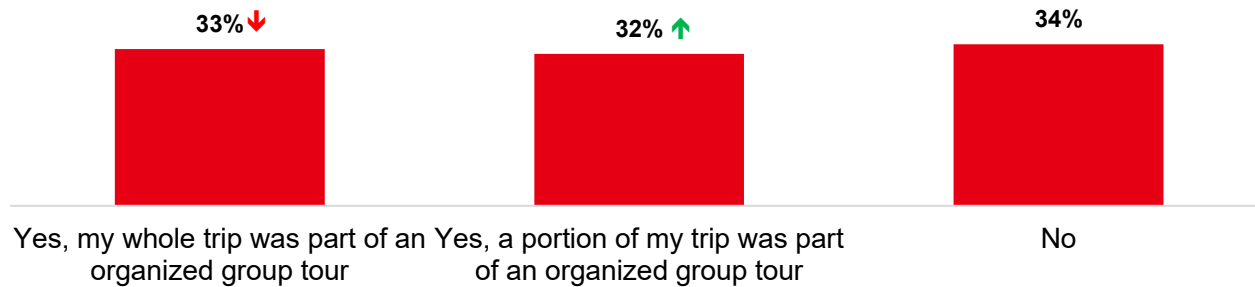
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Intrepid Travel, they do not include AI Travel Assistants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

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

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

Almost two-thirds of Australian travellers used a travel agent on their recent Canada trip, most likely for booking or researching accommodations and booking flights. Researching accommodations increased significantly compared to last year.

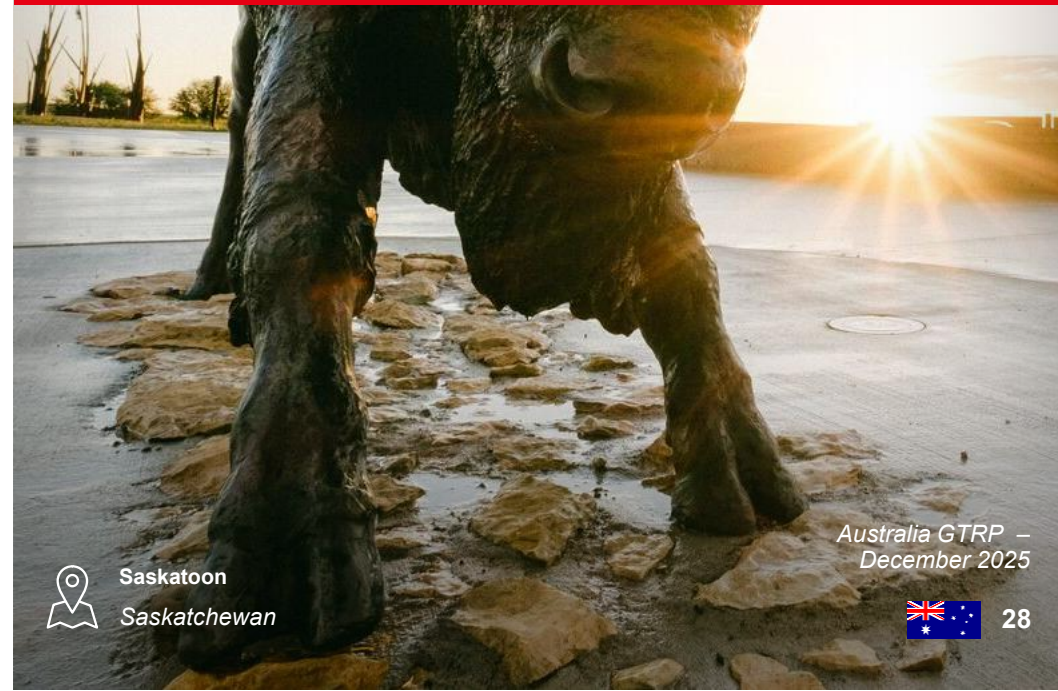
# ORGANIZED GROUP TOUR FOR RECENT TRIP




↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=260) 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?

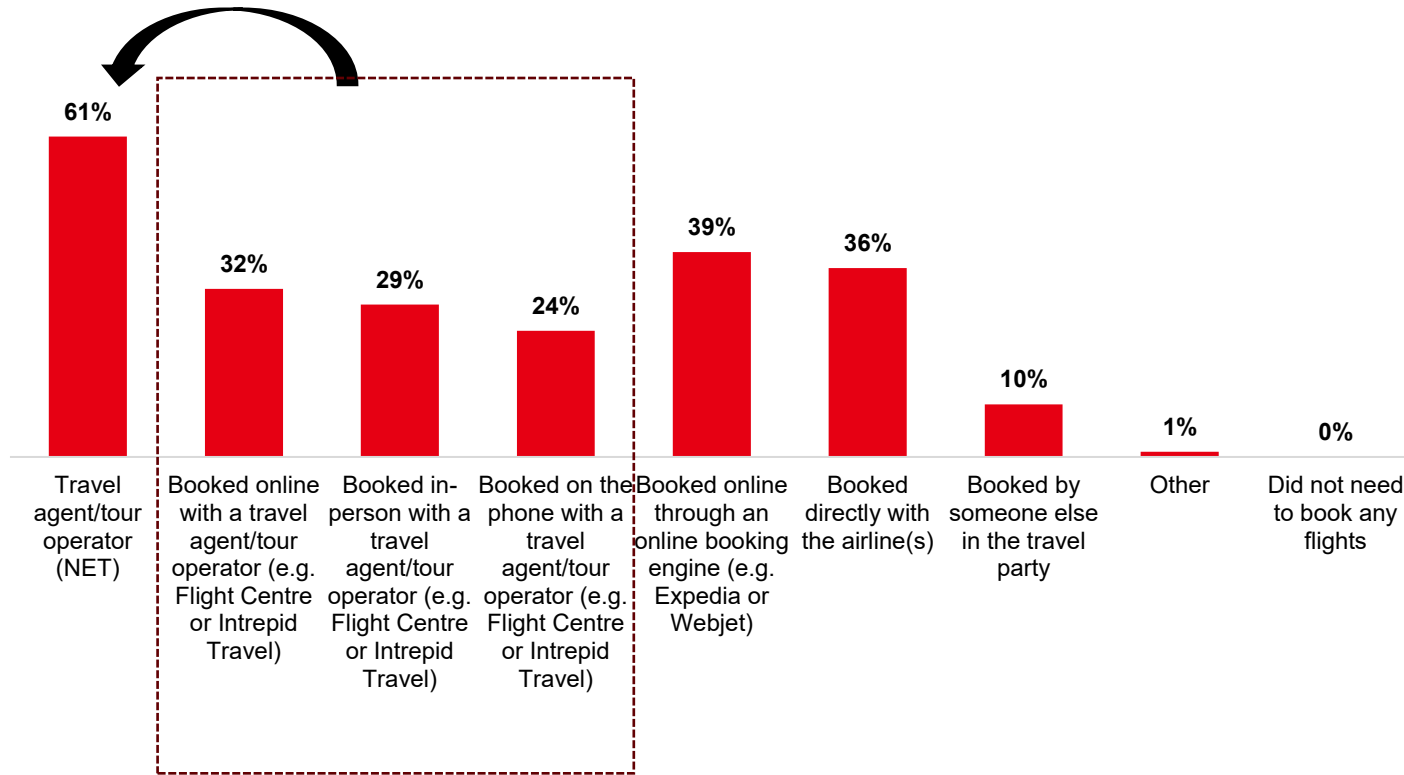
Over six in ten Australian travellers to Canada have used an organized tour, with usage shifting from full-trip tours to partial-trip experiences year over year.



 Saskatoon  
Saskatchewan

Australia GTRP –  
December 2025

# BOOKING FLIGHTS FOR RECENT TRIP



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

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=260)  
 F12. How did you book your flight for this trip? (Select all that apply)

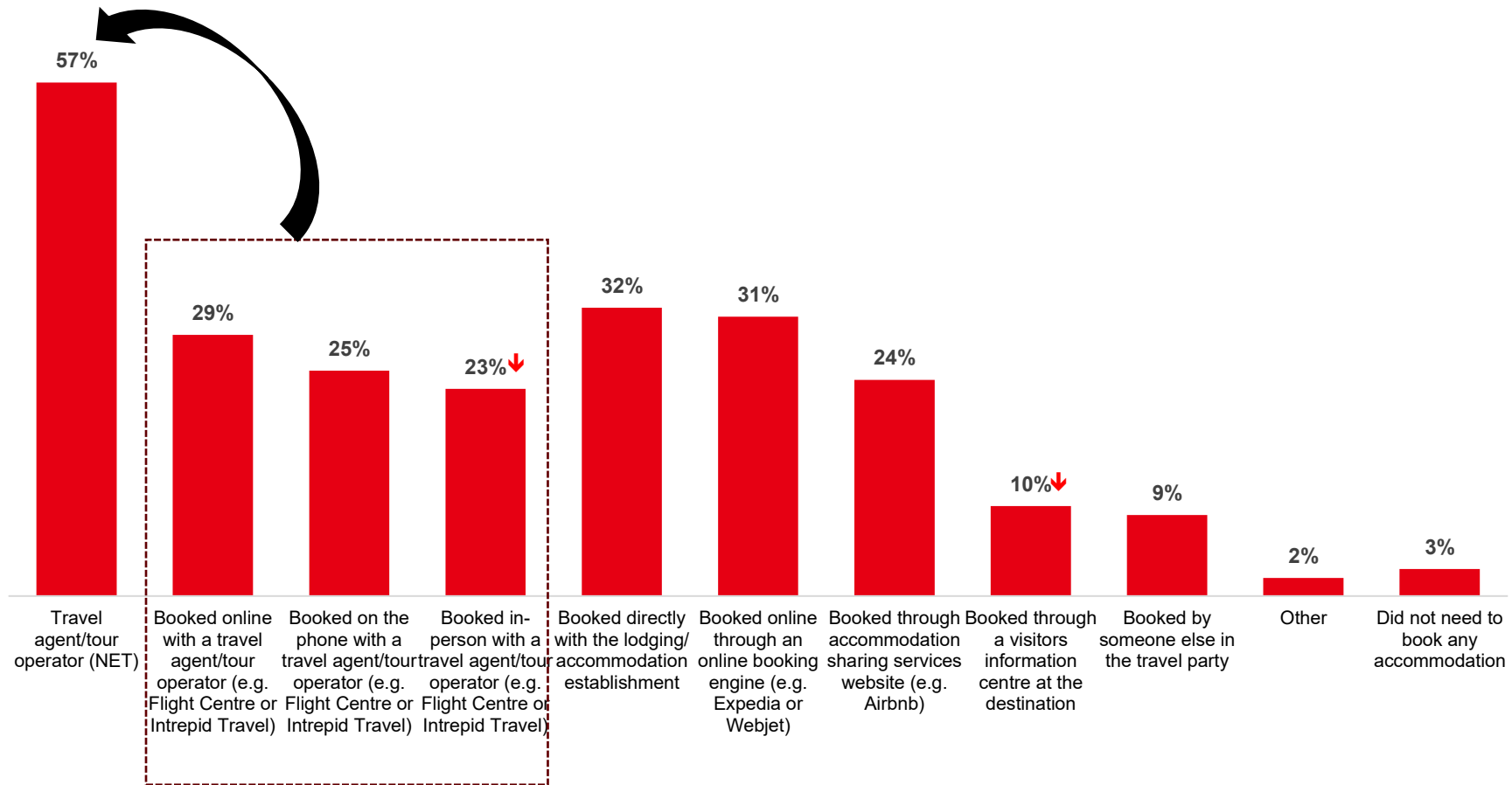


Montmorency Falls Park, Quebec City  
 Quebec

Australia GTRP –  
 December 2025



# BOOKING ACCOMMODATIONS FOR RECENT TRIP

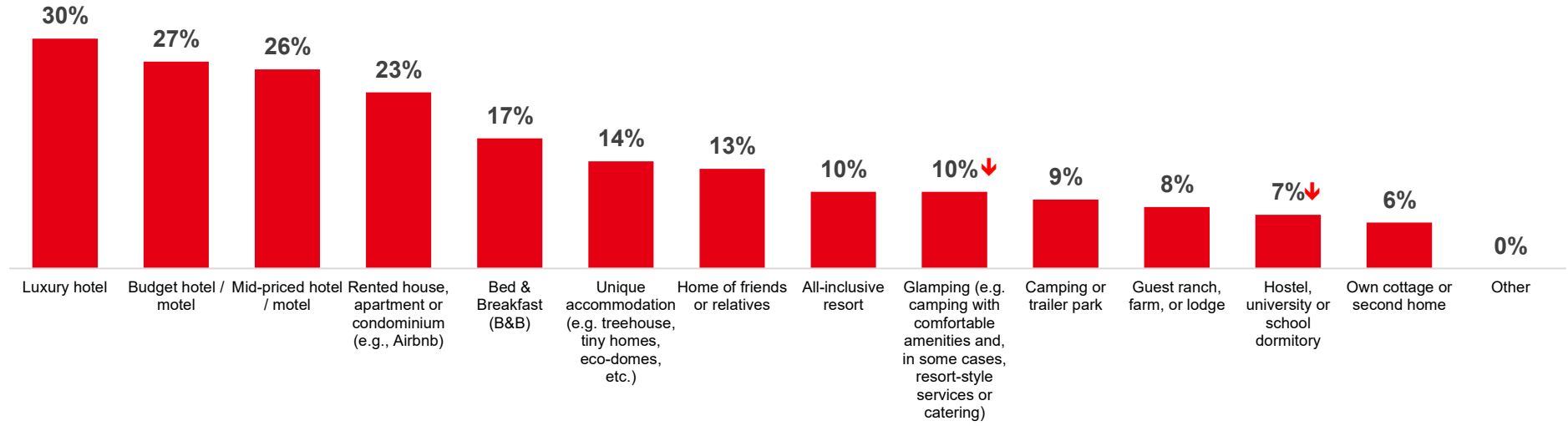


Almost six in ten recent Australian travellers to Canada booked accommodations through a travel agent. Booking in person at a visitors information centre decreased compared to 2024.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=260)  
F13. How did you book your accommodation for this trip? (Select all that apply)

# TYPE OF ACCOMMODATIONS FOR RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=253)  
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



**Australian travellers that recently travelled to Canada were most likely to stay in a luxury hotel, followed by a budget hotel or motel and a mid-priced hotel or motel.**



AustraliaGTR  
 December 2026

Rideau Canal  
 Ontario



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)

