

2025 GLOBAL TRAVELLER RESEARCH PROGRAM

CHINA HIGHLIGHTS REPORT



Canada



Iqaluit Nunavut



CANADIAN TOURISM DATA
COLLECTIVE

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STUDY OVERVIEW: CHINA MARKET



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


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

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




Timing of Fieldwork

November 26th – December 15th 2025



Geographical Definition for Qualified Trips

Outside of: East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)



Sample Distribution

Sample distribution:	11 target cities*
Highly Engaged Guest (HEG) Audience:	1613
Other travellers:	95
Total sample size:	2208

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

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





Consideration for Canada continues to be strong among Chinese travellers, with the next 2-year immediate potential for Canada being 18M. The current geopolitical climate is also creating a tailwind, with 54% stating that they are more likely to visit Canada as a result.



Potential visitors to Canada are more likely to consider a visit during the spring months, with Ontario and BC accounting for the highest number of potential visitors.



Chinese travellers are most likely to base an entire holiday around natural attractions and local cuisine, while also showing an interest in nature walks and oceanside beaches.



Canada ranks seventh as a top of mind Indigenous tourism destination for Chinese travellers. There is a high level of interest in Indigenous cultural experiences among Chinese travellers who seek safety and comfort in experiences, and the inclusion of traditional or local food experiences.



The use of AI in planning or booking trips is increasingly common (especially among younger travellers). Meanwhile, travel agents were used less for destination research compared to last year, but continue to be the most likely way for Chinese travellers to book flights and accommodations.

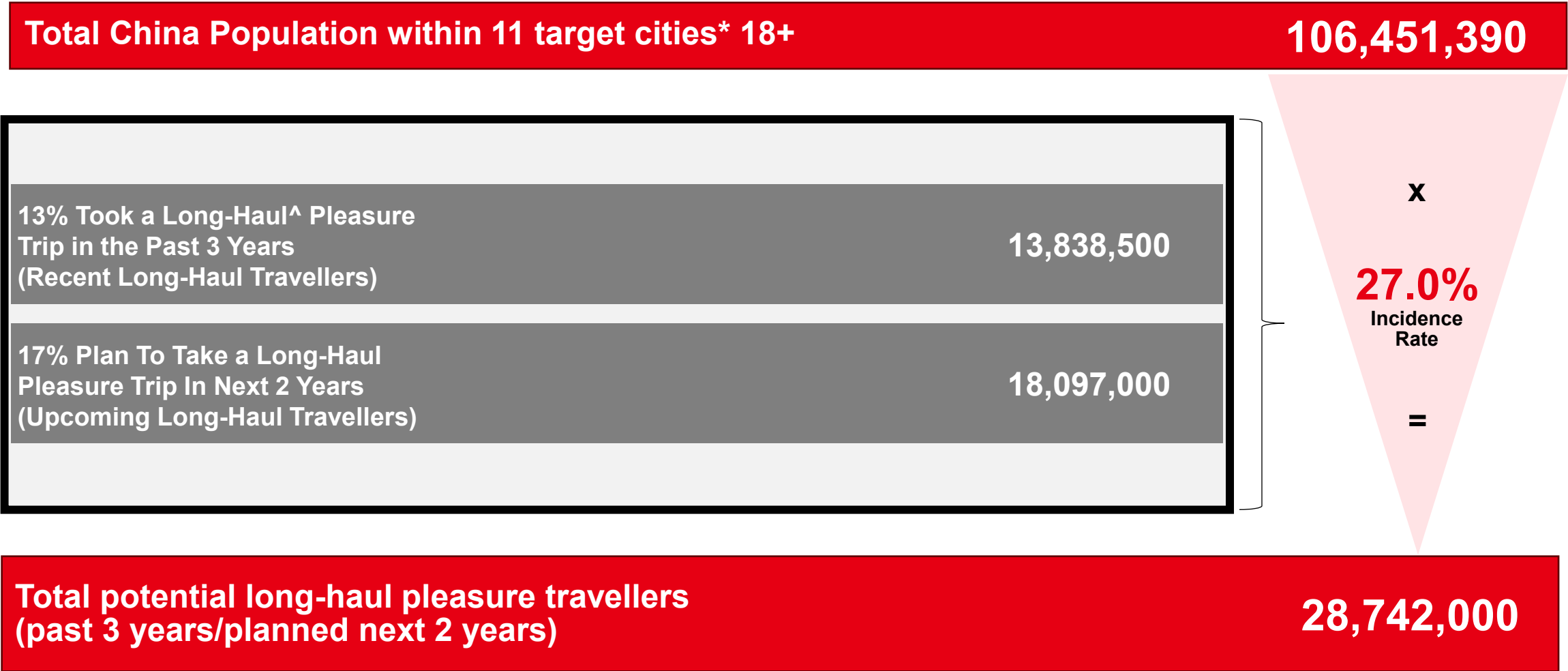
MARKET SIZING



Killarney Provincial Park
Ontario



MARKET SIZING – LONG-HAUL TRAVELLERS



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

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

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



X

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

76.8%

=

Size of the Target Market



X

Immediate Potential for Canada
(Will definitely/very likely visit Canada in the next 2 years¹)

85.6%

=

Immediate Potential



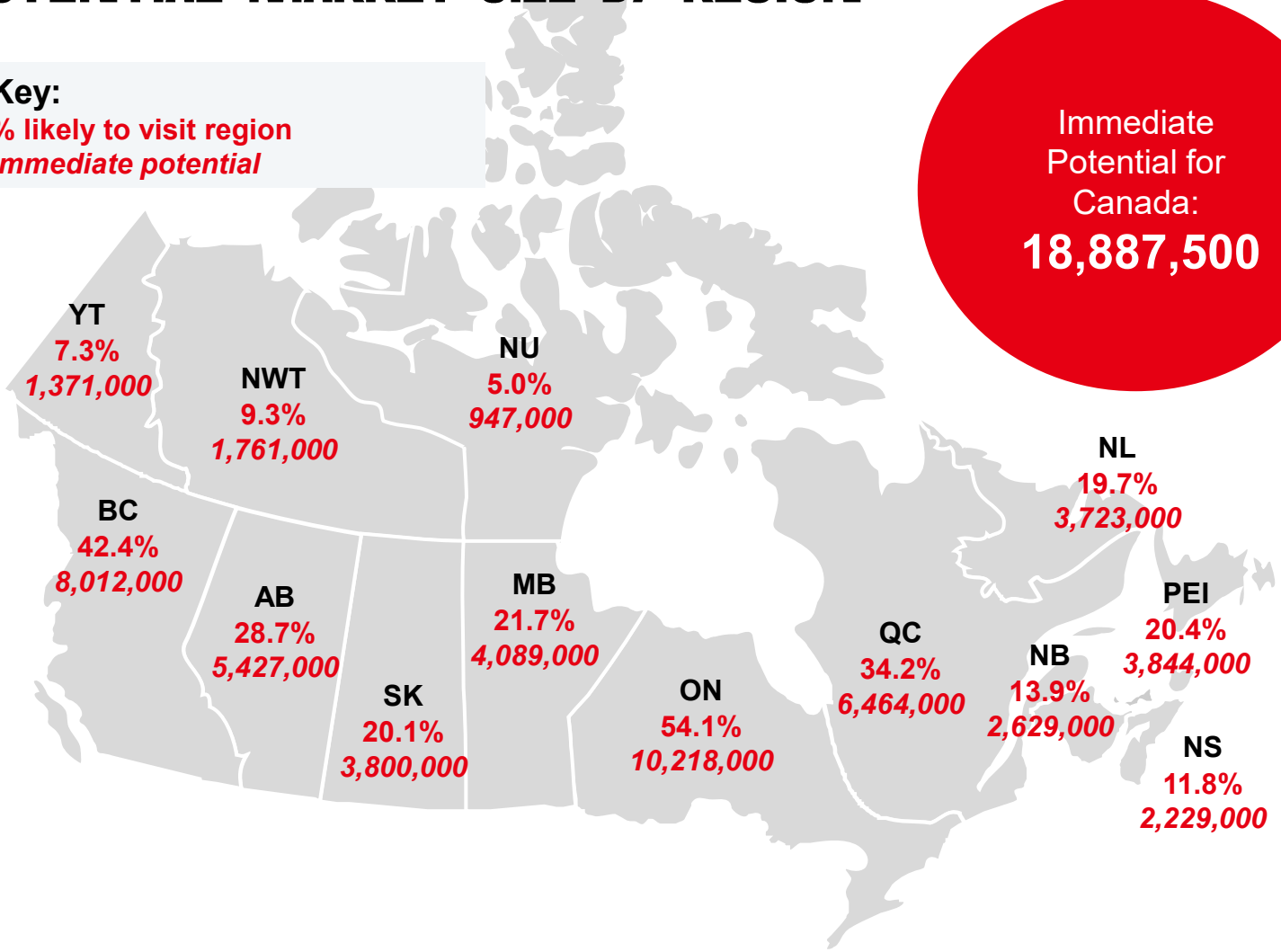
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=2208); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1695)
C1. Which 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 has the potential to draw in over 10.2 million Chinese travellers over the next 2 years.

Immediate Potential for Canada:
18,887,500

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=1695)
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)


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

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	6%	11%	4%	3%
Alberta	4%	6%	3%	2%
Saskatchewan	2%	4%	2%	1%
Manitoba	3%	4%	2%	1%
Ontario	6%	12%	4%	3%
Quebec	6%	8%	3%	2%
New Brunswick	2%	2%	2%	1%
Nova Scotia	2%	2%	1%	1%
Prince Edward Island	3%	6%	1%	1%
Newfoundland & Labrador	3%	4%	2%	1%
Yukon	1%	1%	1%	0%
Northwest Territories	2%	3%	1%	1%
Nunavut	1%	1%	1%	0%

Chinese travellers show the strongest interest in spring, with Ontario and BC being the top destinations.

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1695) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



 Whitehorse
Yukon

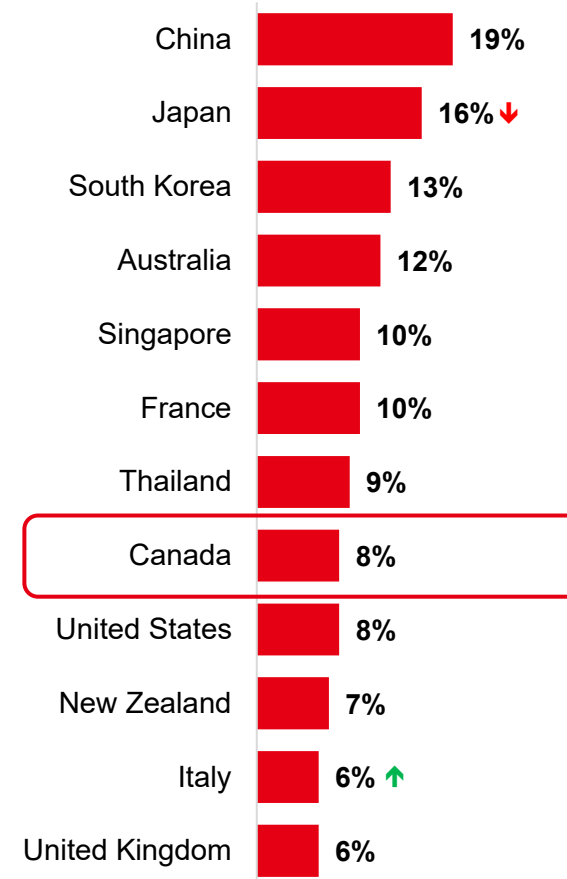
China GTRP –
December 2025



CONSIDERING CANADA AS A TRAVEL DESTINATION

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

On an unaided basis, Canada ranks eighth as a destination Chinese travellers are considering, tying with the US. Scores for Canada have remained stable compared to last year.

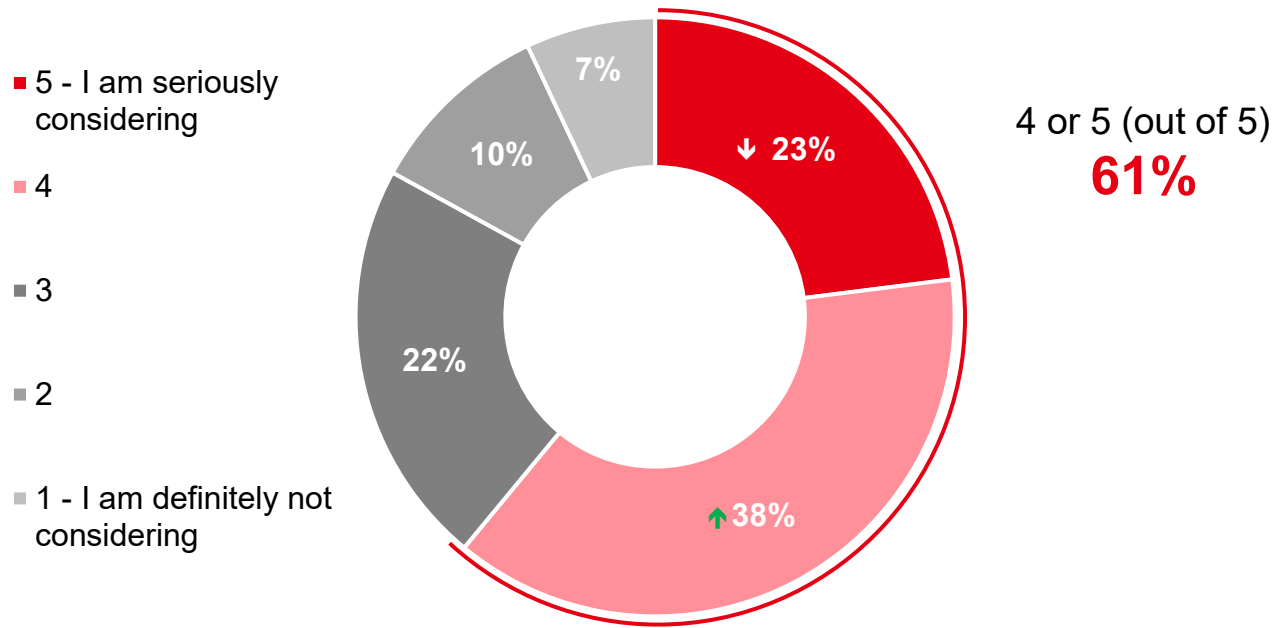


¹ Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2208)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

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



AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



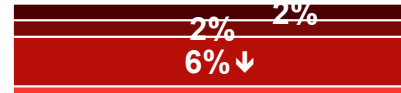
Six in ten Chinese travellers would consider visiting Canada in the next 2 years

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2208)
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
21%↓

Over two in ten Chinese travellers are actively planning a trip to Canada, down compared to a year ago.

↑ / ↓ = 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=2208)
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)

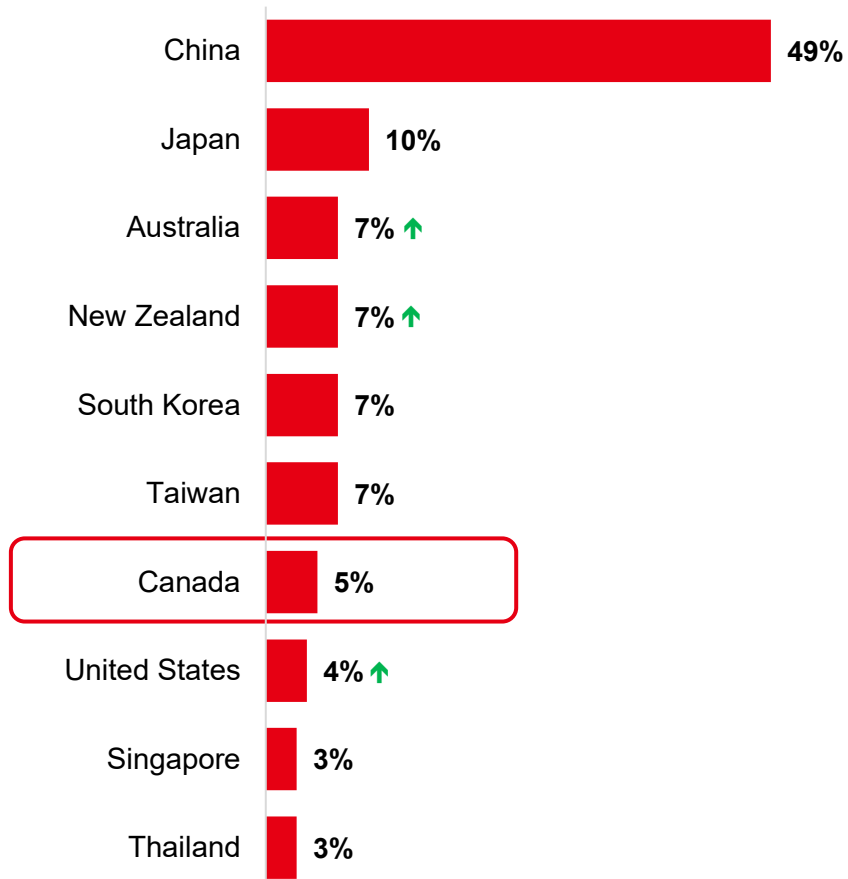
INDIGENOUS TRAVEL



Carcross
Yukon



UNAIDED INDIGENOUS DESTINATION



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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2208)

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 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.



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



Manitoulin Island
Ontario



INTEREST IN CANADA AS AN INDIGENOUS DESTINATION

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

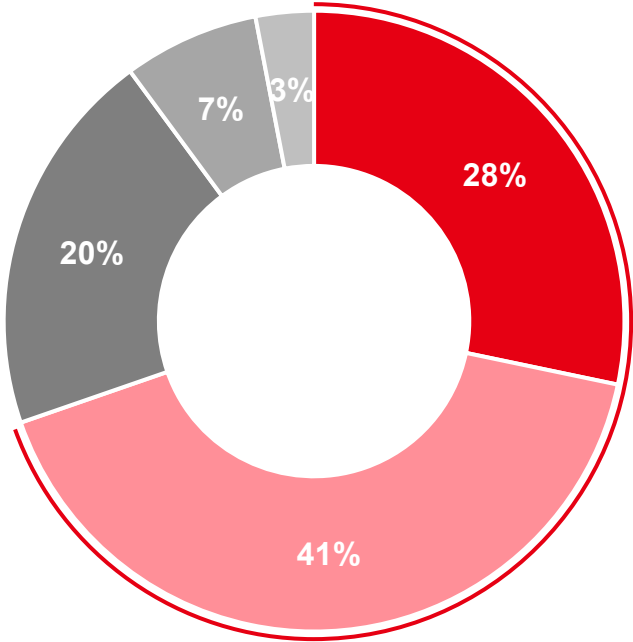
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)
70%

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=1102)
 C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort, along with local food experiences, are the top drivers of interest in Indigenous cultural experiences, though overall interest across factors has 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=1102)
 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

36%

Natural Attractions

30%

Trying local food and drink

27%

Nature Walks

26%

Oceanside Beaches

25%

Historical, Archaeological or World Heritage Sites

23%

Amusement or theme parks

22%

Nature Parks

20%

Lakeside Beaches

19%

Learning About Indigenous Culture, Traditions or History

19%

Viewing Wildlife or Marine Life

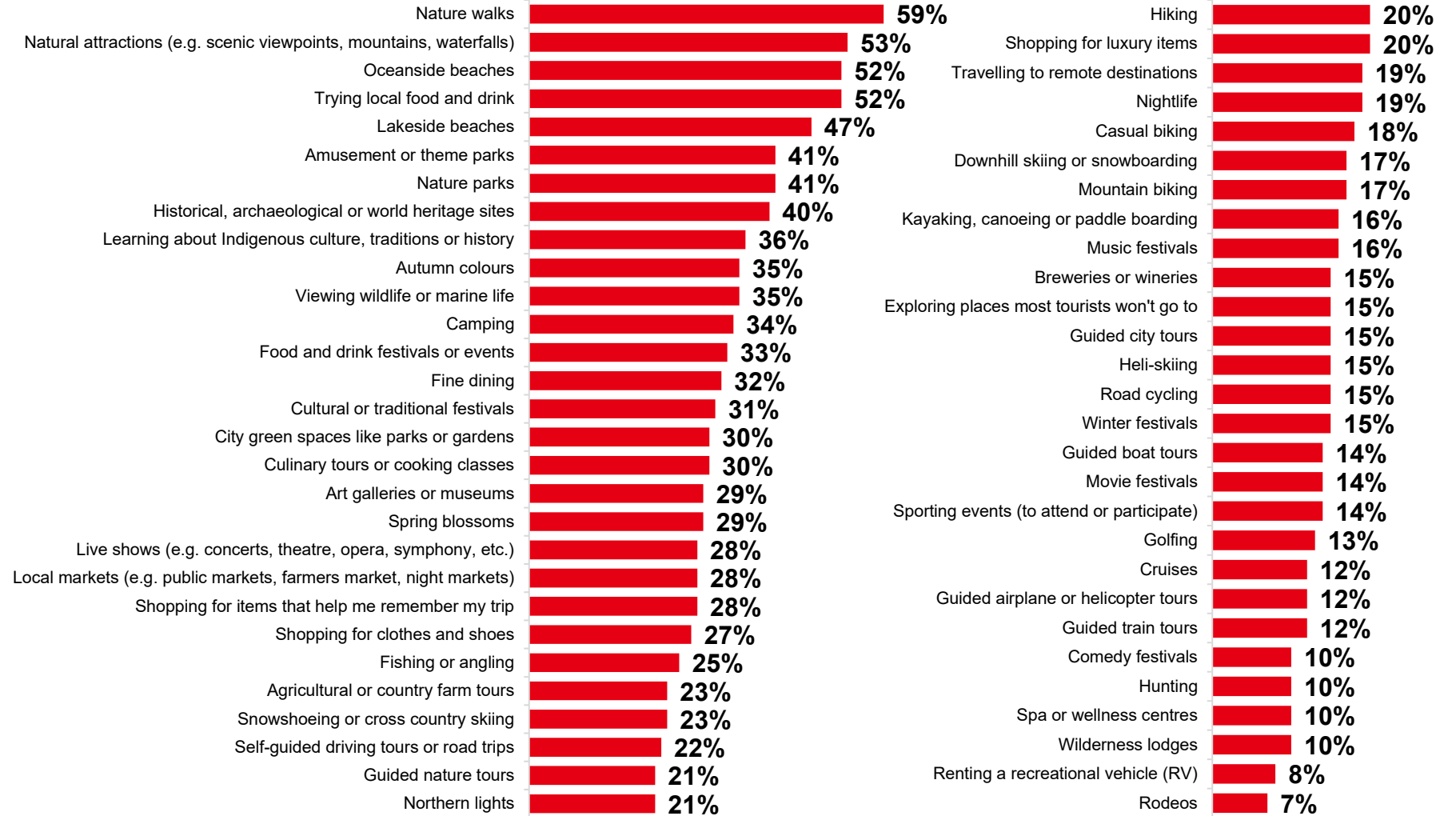


Chinese travellers are most likely to base an entire holiday around natural attractions and trying local cuisine.



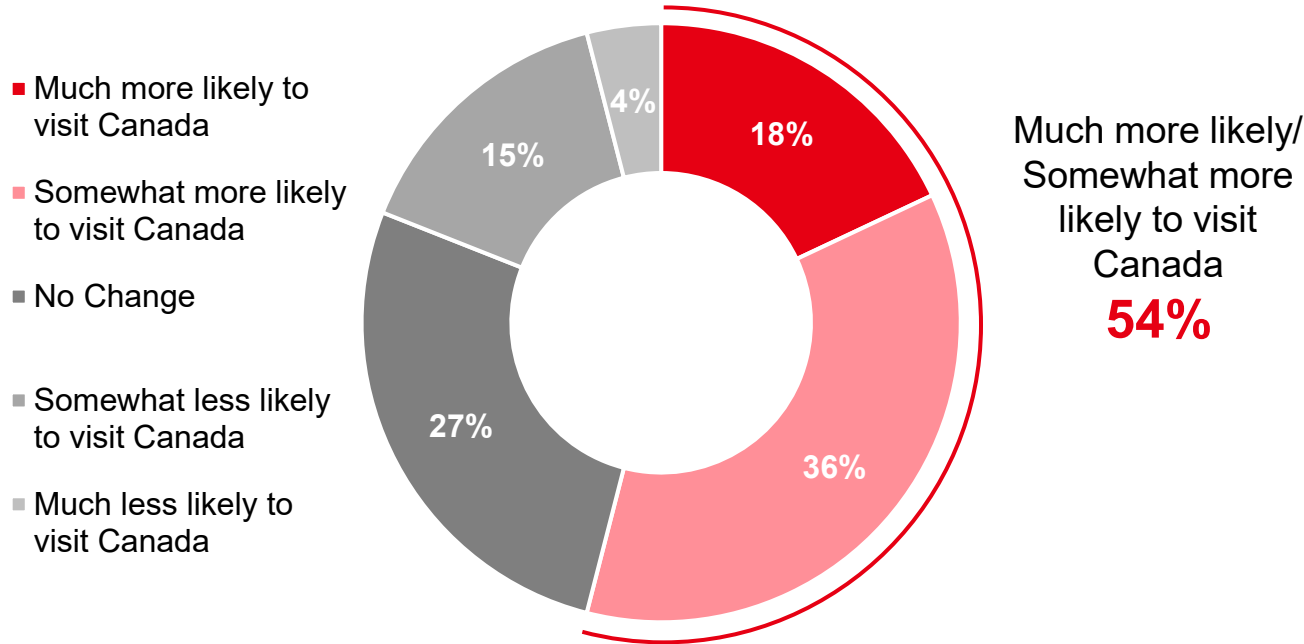
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

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



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2208)
 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



Over one half of Chinese travellers feel that the geopolitical climate would make them more likely to visit Canada, with almost two in ten stating it would make them much more likely to visit.

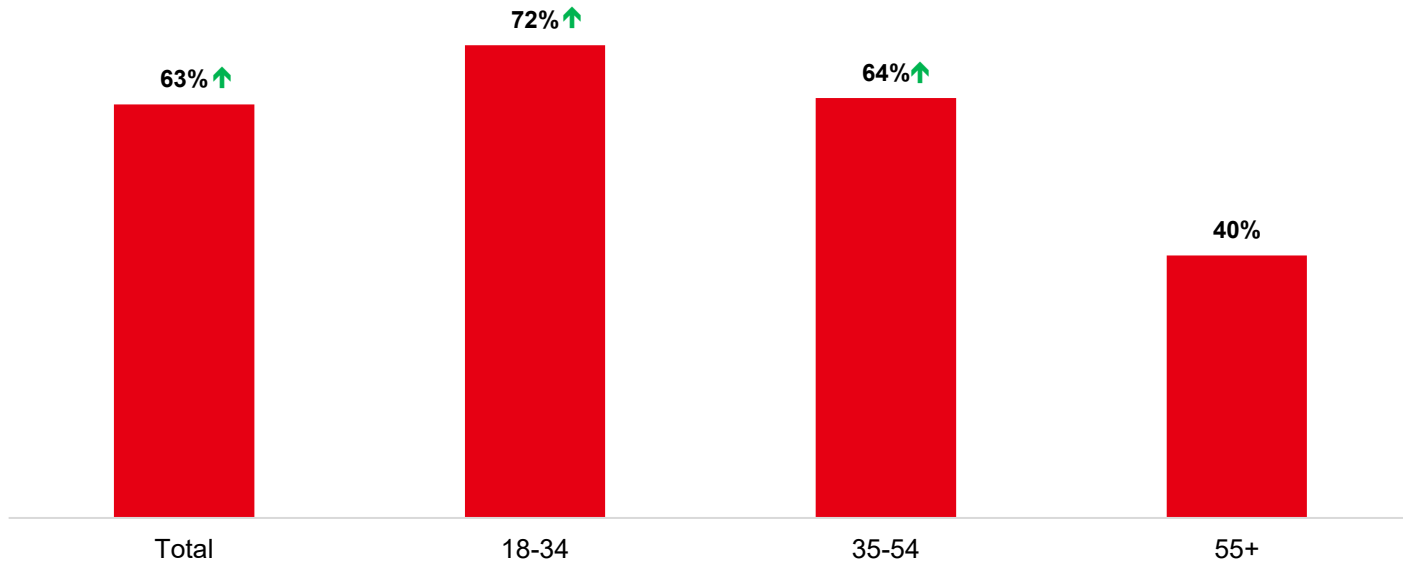
Geopolitical Climate Description

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=1129)
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?



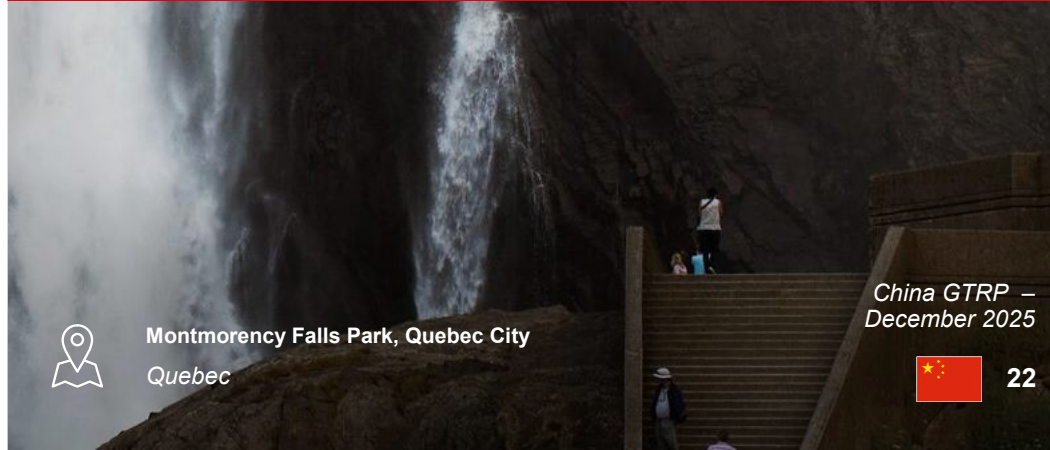
USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



AI is becoming a widely used planning tool, with usage increasing year over year to over six in ten Chinese travellers, and over seven in ten among 18-34 years old.

↑ / ↓ = 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=2208); 2025 18-34 (n=853); 2025 35-54 (n=1040); 2025 55+ (n=315)
 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

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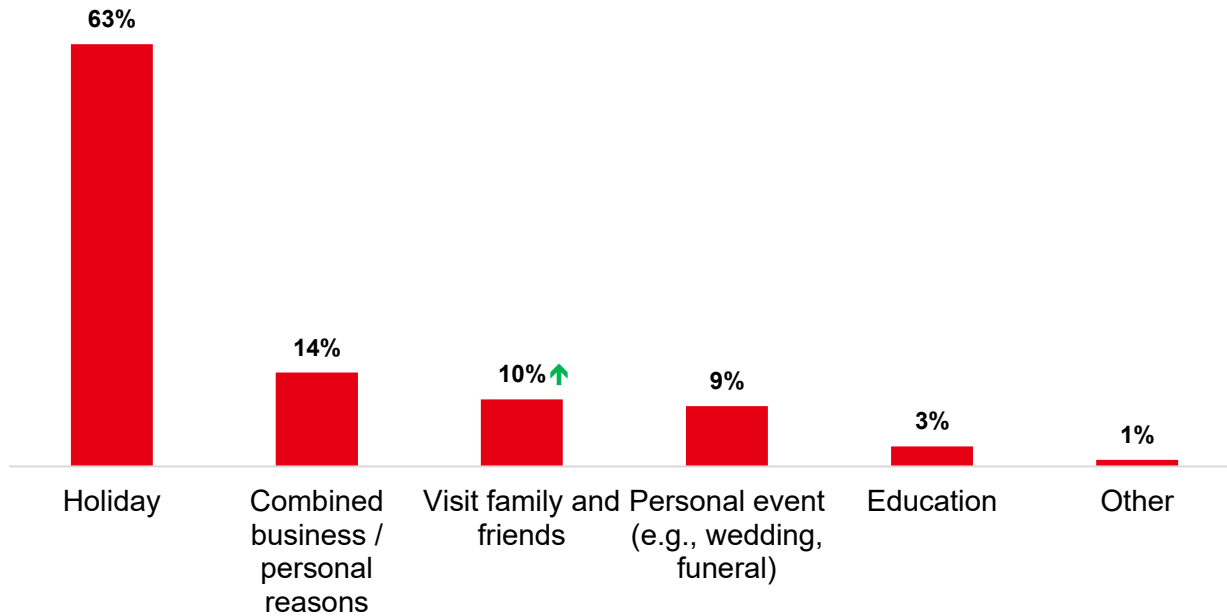
MOST RECENT TRIP TO CANADA



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=466)
 F2. What was the main purpose of this trip? (Select one)



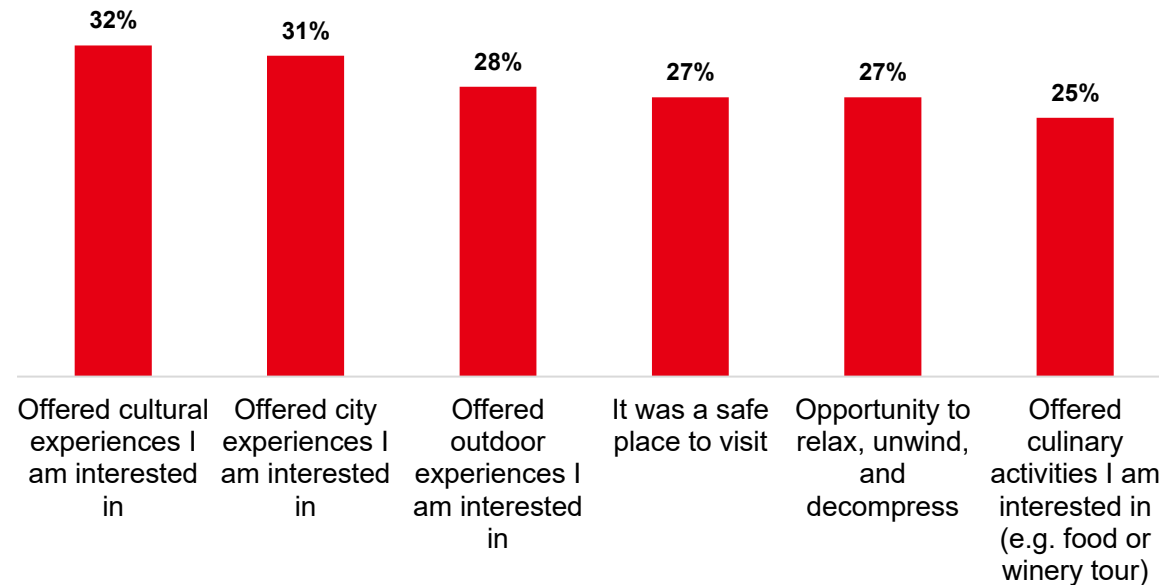
Holidays continue to be the dominant purpose for Chinese travellers to Canada in the past three years. Trips to Canada to visit family and friends has shown an increase year over year.



Nahanni National Park Reserves
 Northwest Territories



FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



Chinese travellers tend to choose Canada because it offers cultural and city experiences that they are interested in.

↑ / ↓ = 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=294)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)



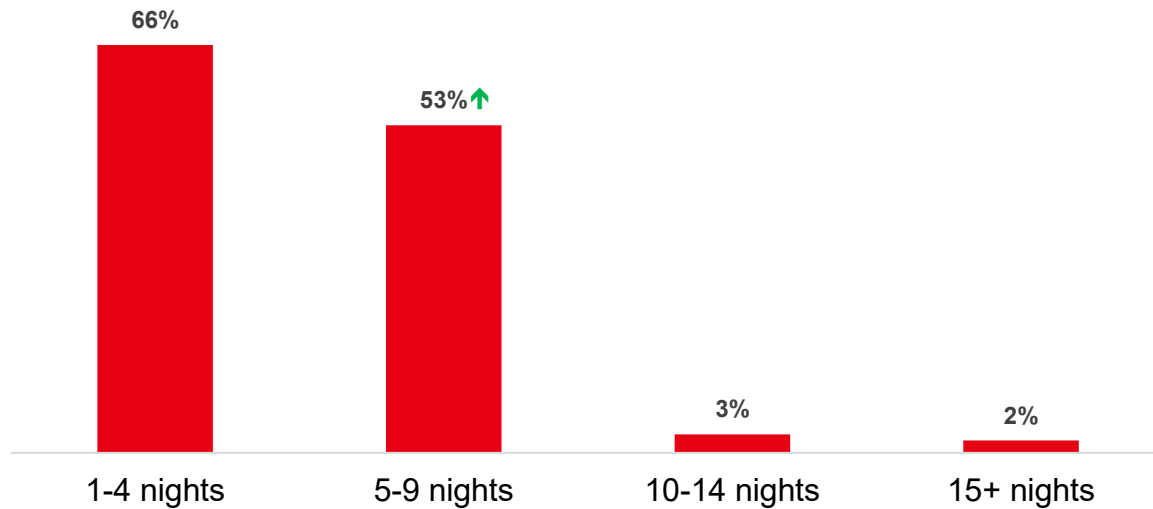
Fundy Trail Provincial Park
New Brunswick

China GTRP –
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NIGHTS SPENT DURING RECENT TRIP

■ Travellers to Canada (n=466)



↑ / ↓ = 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=466)
F4. How many nights did you spend in this destination?

Trips to Canada of 5-9 nights have increased compared to last year, although stays for up to 4 nights are still the most common.



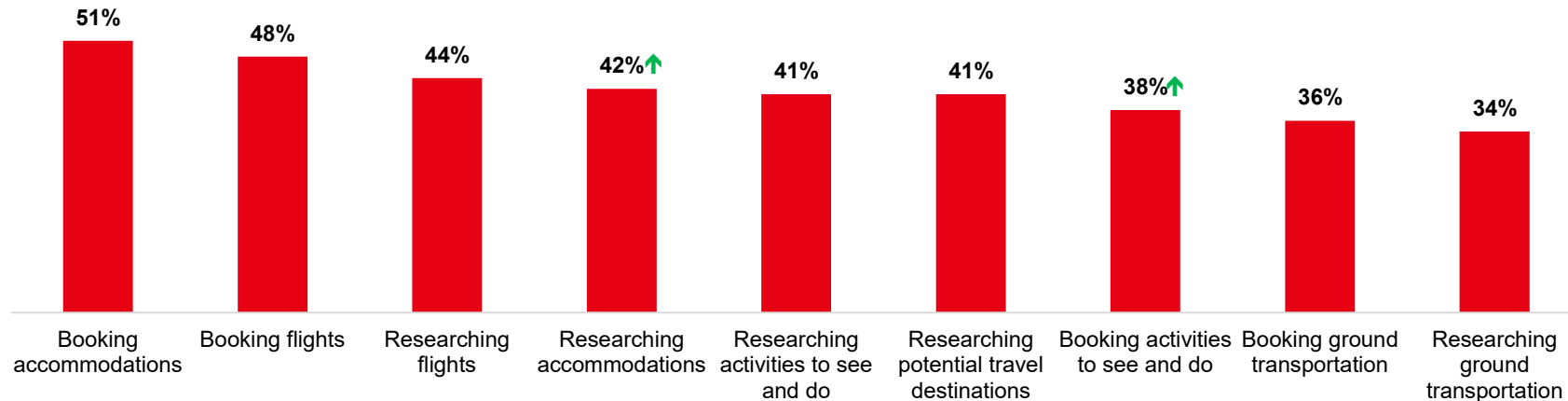
Barren Canyon, Algonquin Park
Ontario

China GTRP –
December 2025



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

↓ **73%** 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=340)

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Used a Travel Agent/Tour Operator (n=466)

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

Over seven in ten Chinese travellers to Canada use travel agents, primarily for booking flights and accommodations. Overall usage has declined year over year, with growing use for research and activity bookings.

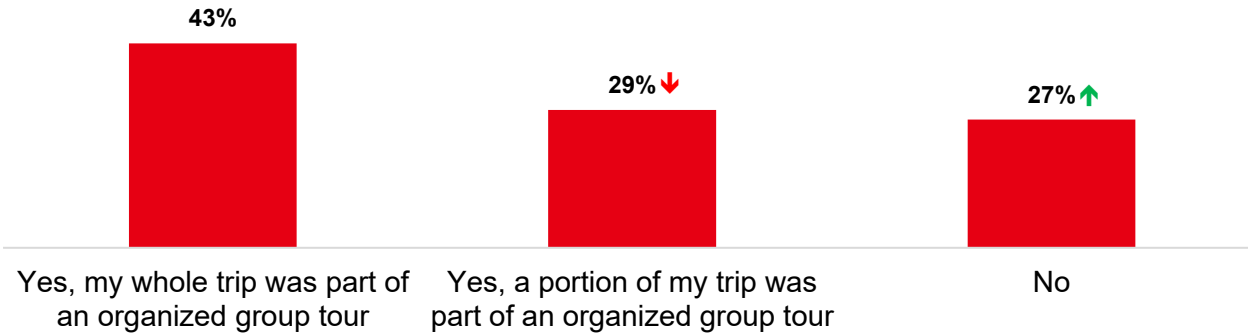


Twin Falls Lodge
Saskatchewan

China GTRP –
December 2025



ORGANIZED GROUP TOUR FOR RECENT TRIP



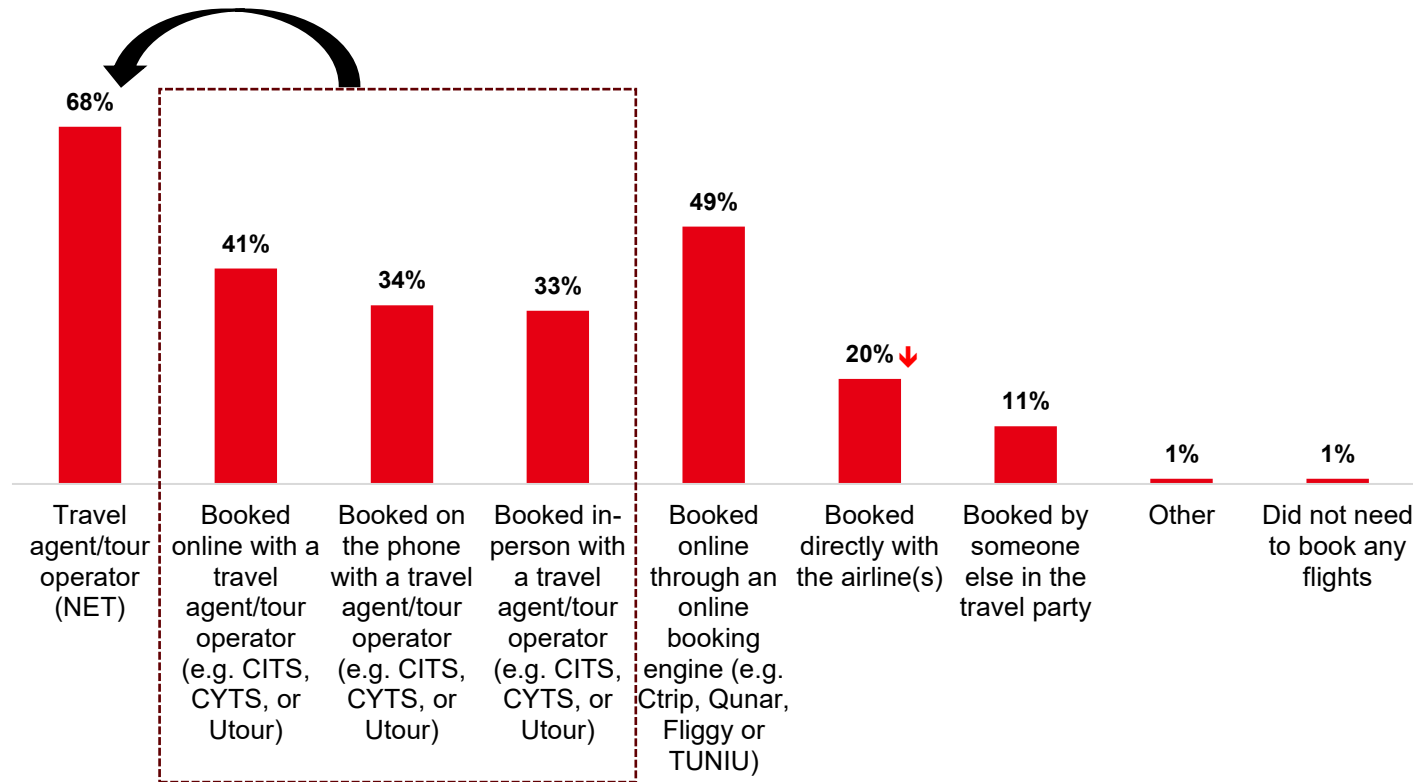
↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=466) 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?

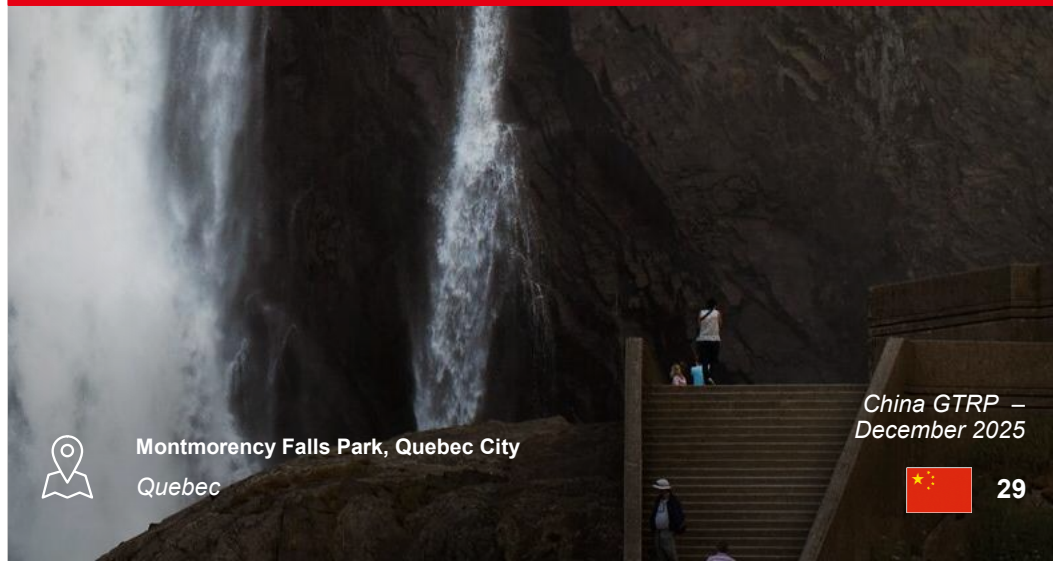


Over seven in ten travellers to Canada in the past three years used an organized group tour for at least a portion of their trip, though usage has decreased overall compared to last year.

BOOKING FLIGHTS FOR RECENT TRIP



Booking flights through a travel agent or tour operator, followed by booking online were the most popular ways to book among recent Chinese travellers to Canada. Booking flights directly with the airline decreased compared to last year.



↑ / ↓ = 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=466)
 F12. How did you book your flight for this trip? (Select all that apply)

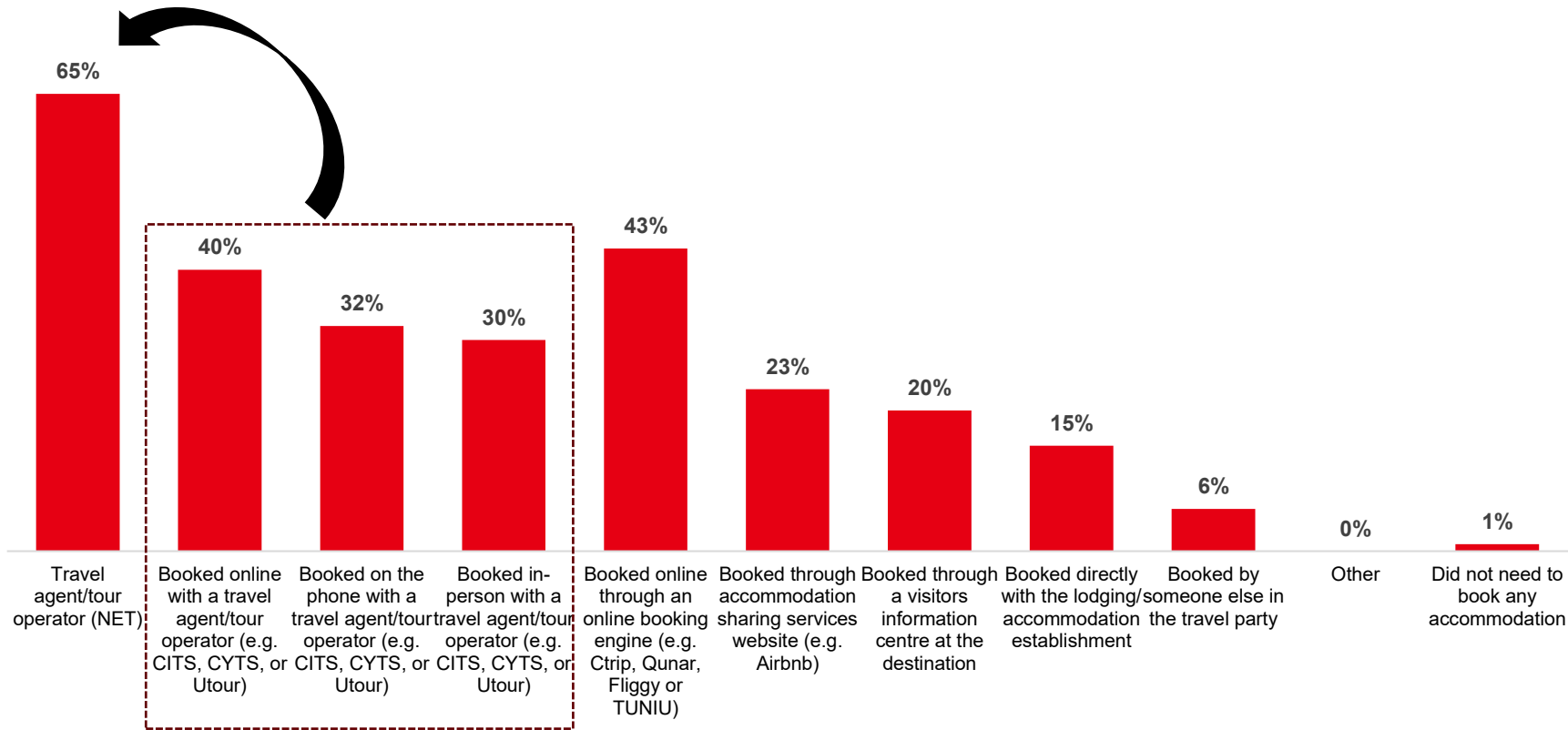


Montmorency Falls Park, Quebec City
 Quebec

China GTRP –
 December 2025



BOOKING ACCOMMODATIONS FOR RECENT TRIP

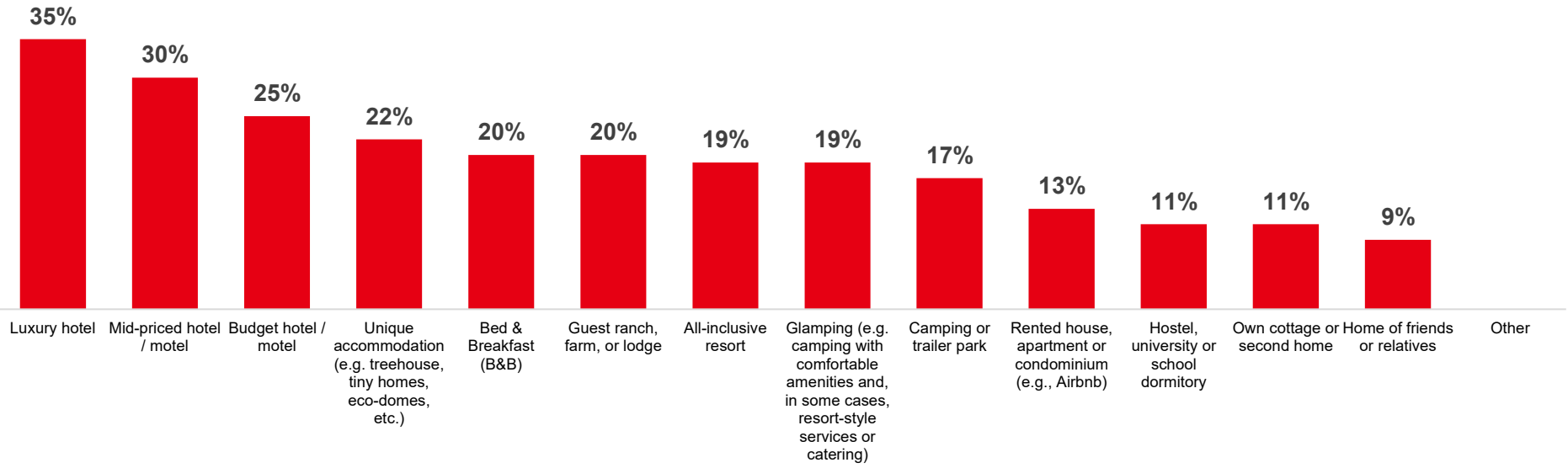


Top methods for booking accommodations include booking with a travel agent or tour operator, followed by booking through an online booking engine.

↑ / ↓ = 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=205)
 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=463)
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



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



China GTRF December 2025

Rideau Canal Ontario

THANK YOU

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

