

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

SYNDICATED REPORT

CHINA MARKET OVERVIEW

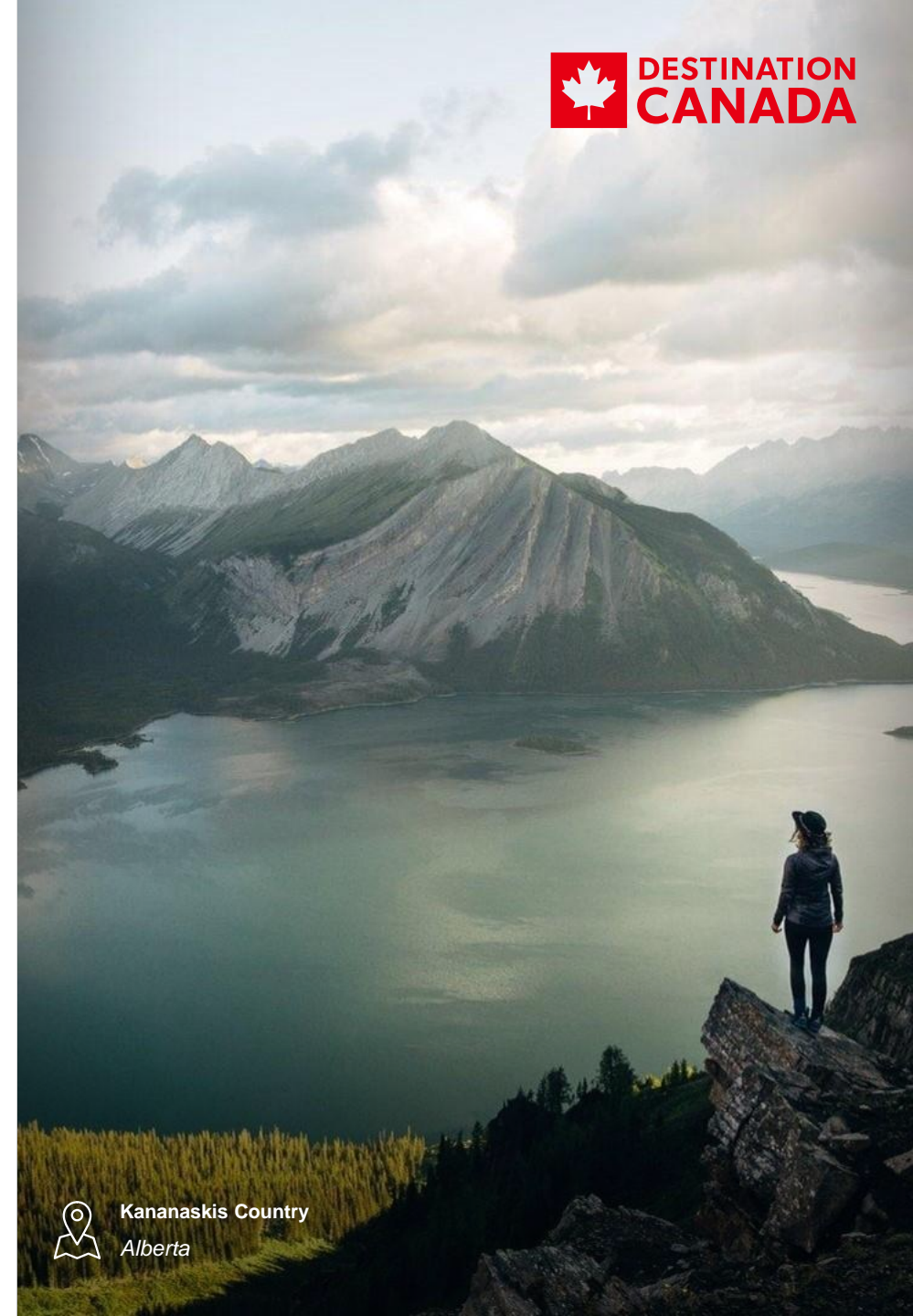


CANADIAN TOURISM DATA
collective

China Market Overview

An annual view of the Chinese market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.

Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).



Kananaskis Country
Alberta


YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.



Survey Start in China

October 20, 2020



Methodology Notes

Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.



2023 Base Sizes

Sample distribution: **Online 18+**

National results filtered to Beijing, Chengdu, Guangzhou, Hangzhou, Nanjing, Qingdao, Shanghai, Shenyang, Shenzhen, Suzhou – Jiangsu, Xian

Filtered China: **4,683**



YouGov® DestinationIndex


YouGov DestinationIndex is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy, and ultimately influence travellers' perception of Canada.



Survey Start in China

January 30, 2015

Canada added as a tracked destination on July 6, 2023



Methodology Notes

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.



Jul-Dec 2023 Base Sizes

Sample distribution: **Online 18+**

National results filtered to Beijing, Chengdu, Guangzhou, Hangzhou, Nanjing, Qingdao, Shanghai, Shenyang, Shenzhen, Suzhou – Jiangsu, Xian

Filtered China: **448 - 921**



Syndicated Product Overview



YouGov® Destination Index

16 key metrics

Engagement: Media & communication metrics

- Advertising Awareness**
1 Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
- Aided Awareness**
2 Which of the following destinations have you ever heard of? Please select all that apply.
- Attention**
3 Respondents hearing positive OR negative buzz about the destination.
- Buzz**
4 Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?
- Word of Mouth Exposure**
5 Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

5

Lower funnel metrics

- Purchase Intent**
6 Which of the proposed destinations are you most likely to visit?
- Consideration**
7 When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
- Recent Visitor (Current Customer)**
8 Which of the following destinations have you visited in the past 12 months?
- Former Visitor (Former Customer)**
9 Which of the following destinations have you ever visited?

Destination / Brand health metrics

- General Impression**
10 Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?
- Visitor Satisfaction**
11 Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?
- Quality**
12 Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?
- Value**
13 Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.
- Reputation**
14 Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?
- Recommendation**
15 Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?
- Index (Overall Destination Health)**
16 Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend



Travel is surging post-pandemic

- Passion for travel is on the rise
- 71% are planning a domestic vacation, up significantly year-over year
- 33% are planning an international vacation, up significantly year-over year
- 61% are planning two or more trips, up significantly year-over year



- *While China's travel market thrives, ongoing travel restrictions limit Canada's ability to capitalize on this surge. Maintaining a presence in the traveller mindset could help Canada remain competitive as restrictions change*



Chinese travellers enjoy variety in their experiences

- Chinese travellers are passionate about exploring diverse cultures, learning during vacations and having a variety of experiences
- Natural beauty is the top factor influencing destination choice
- Combined relax-and-explore vacations top the list of preferred vacation types



- *Crafting messages that highlight Canada's natural beauty and historical and cultural offerings could align with Chinese travellers' preferences for exploration, learning and relaxation to enhance appeal*



Travel barriers and influences are evolving

- Mentions of health risks and travel restrictions are down
- Safety is now the most mentioned travel obstacle and safety measures the third most mentioned destination choice influence
- Price of travel has become increasingly mentioned as a travel obstacle
- Mentions of overall value for money as an influence have increased



- *Communicating Canada as a safe place to visit (low crime, safe to walk around, safe for solo travel) could help to alleviate potential concerns of Chinese visitors*



Canada performs lower compared to other long-haul competitors

- New Zealand, Australia and France lead the competitive set in all metrics
- Canada ranks last in consideration and second to last in recommendations
- Ad awareness and word of mouth for most long-haul destinations is low



- *Marketing could focus on increasing awareness and word of mouth of Canada, showcasing unique experiences and addressing potential barriers to consideration*



Social and digital are the best ways to reach Chinese travellers

- 49% use social media and 40% use information from friend/family when trip planning
- 43% mention online streaming services as most effective advertising channel
- 42% mention social media as most effective advertising channel




- *Showcasing engaging and shareable content via social media and online streaming services could resonate with Chinese travellers*





China Market Overview



 Peggy's Cove
Nova Scotia



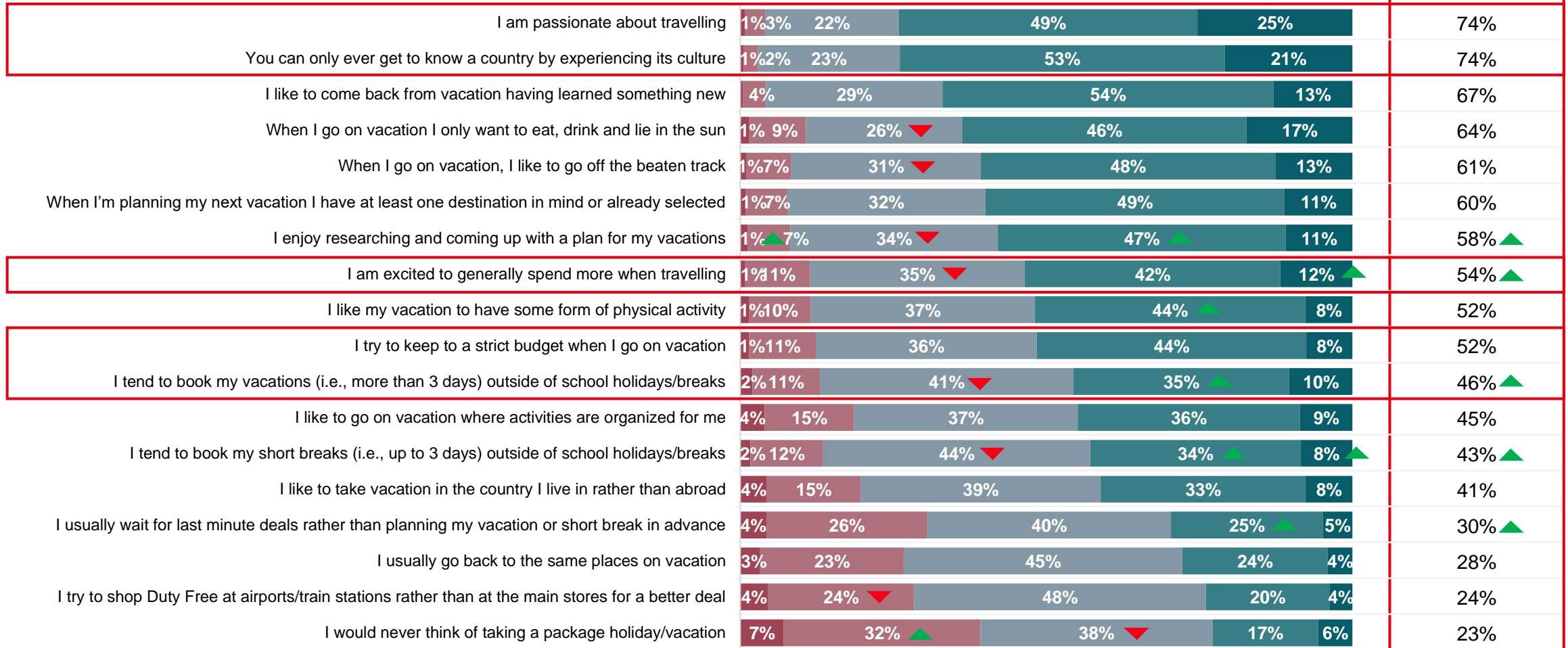
Attitudes Towards Travel



Chinese travellers are passionate about exploring diverse cultures. While there is a growing excitement to spend more when travelling, a considerable portion adheres to strict budgets, and nearly half prefer booking vacations outside of school holidays, striking a balance between indulgence and financial prudence

■ Definitely disagree ■ Tend to disagree ■ Neither agree nor disagree ■ Tend to agree ■ Definitely agree

Definitely / Tend to agree (Top 2 box)

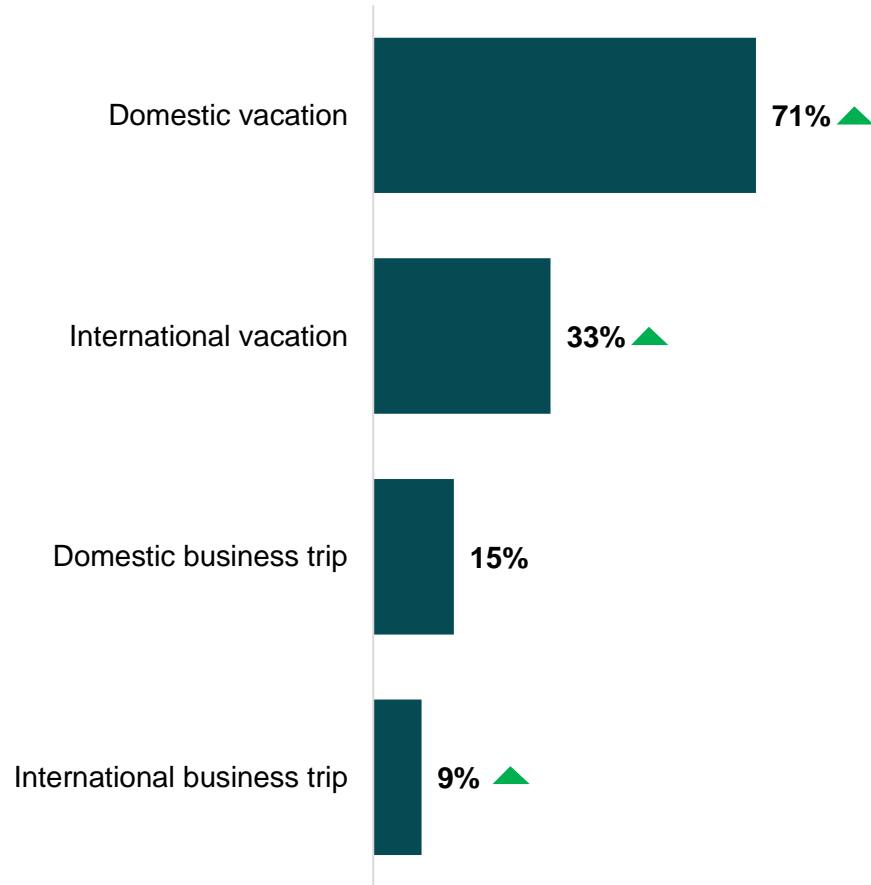


Trip Types Planned in Next 12 Months

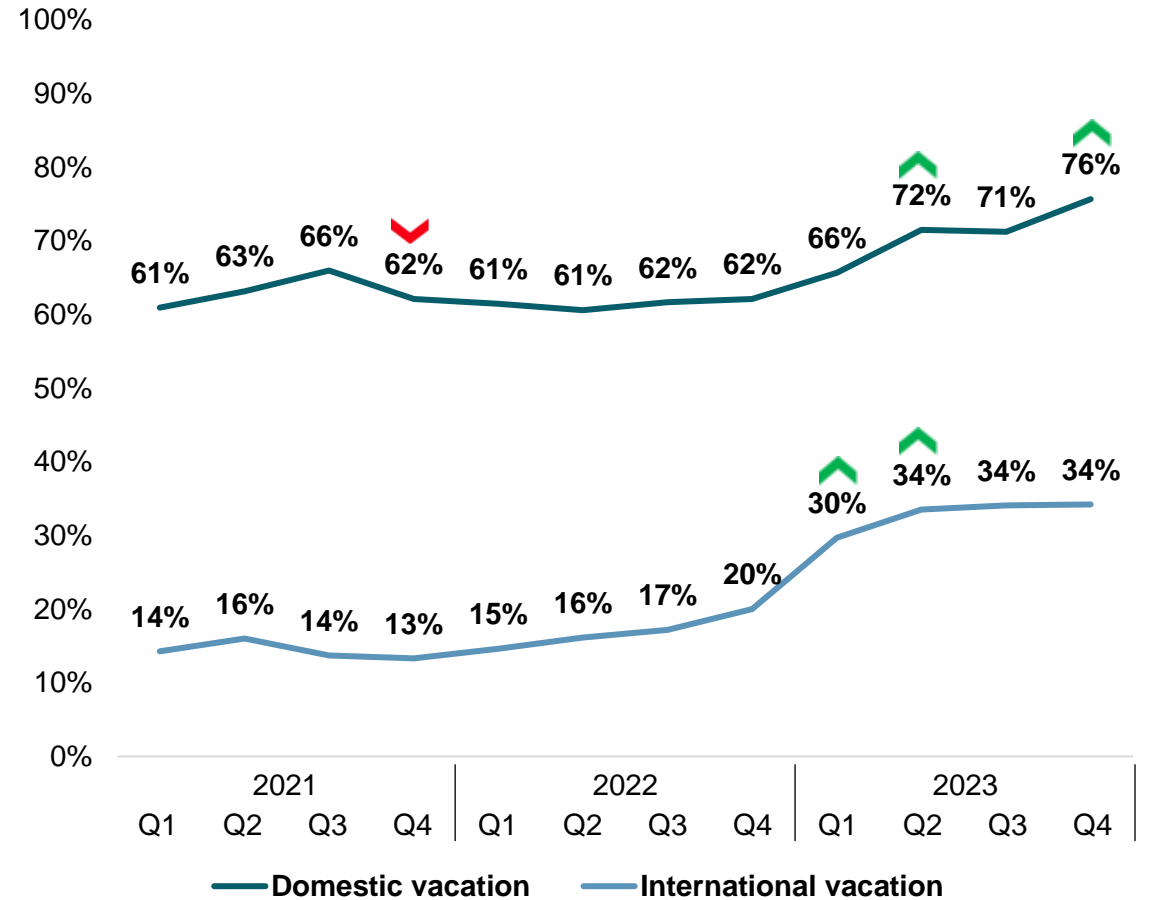


Incidence of planned vacations, both domestic and international, surged in 2023 as travel restrictions eased, seeing significant growth. Chinese have an overwhelming preference towards domestic travel, being twice as likely to be planning a domestic vacation over an international vacation

Trip Types Planned in Next 12 Months



Vacation Trips Planned in Next 12 Months (Trended)



9 2023 Base: Filtered China 18+ (n=4,683)
 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=917-1,322)
 Q: Which, if any, of the following trips are you planning to take in the next 12 months?
 Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

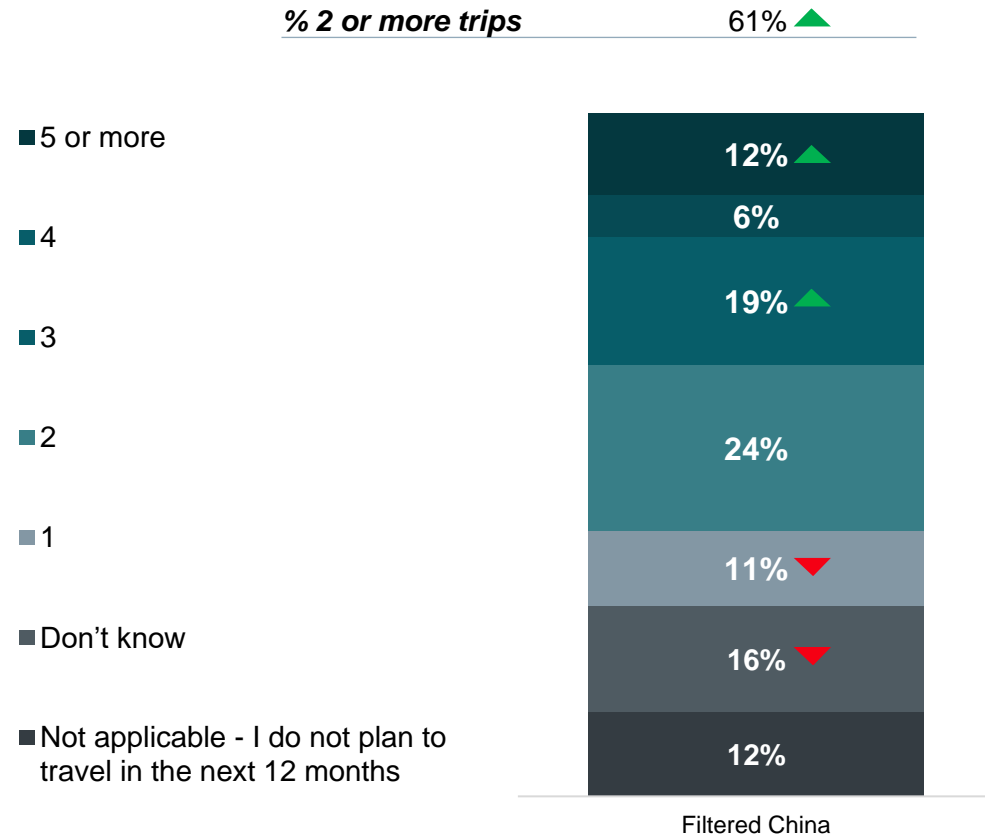


Number of Trips Planned in Next 12 Months

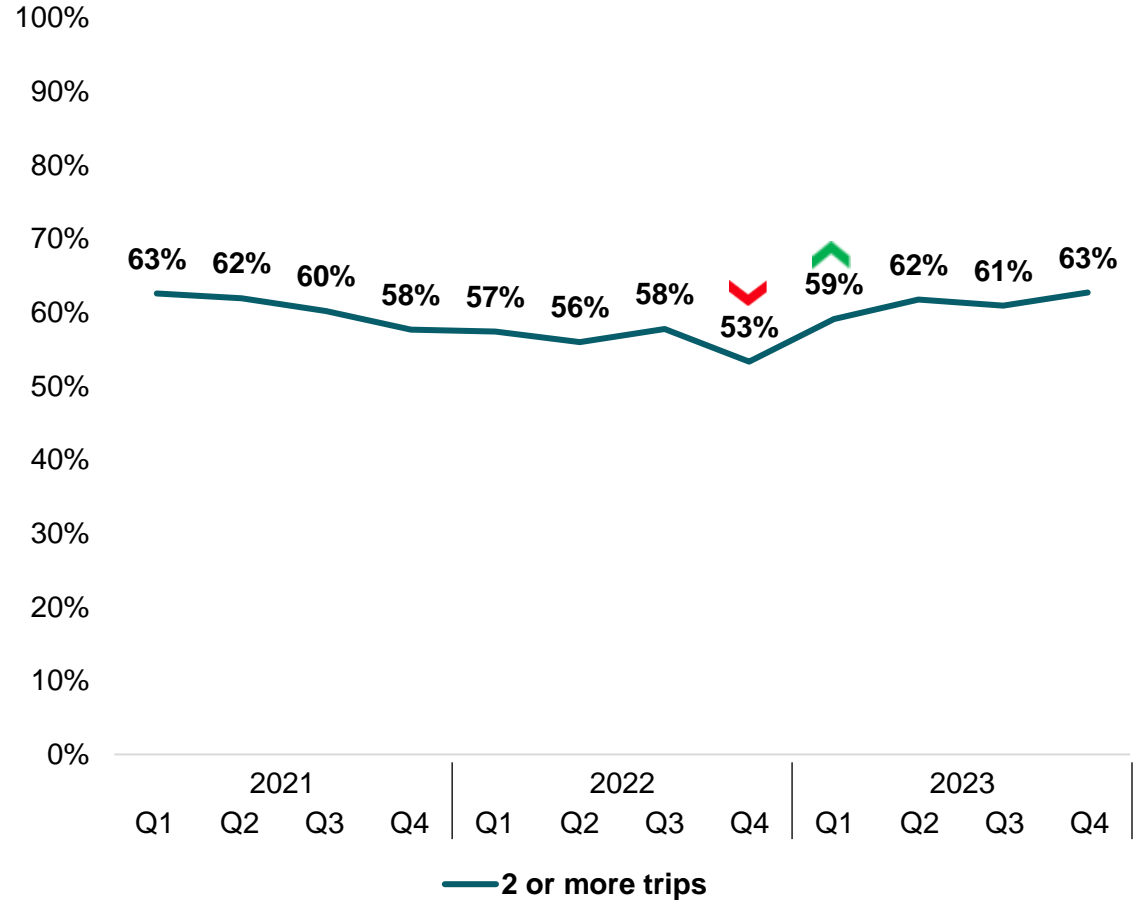


Chinese are planning more trips in 2023 than in 2022 as the Chinese tourism industry continues its post-pandemic recovery. Three in five Chinese are planning two or more trips in the next year, and almost one in five are planning four or more

Number of Trips Planned



Number of Trips Planned (Trended)

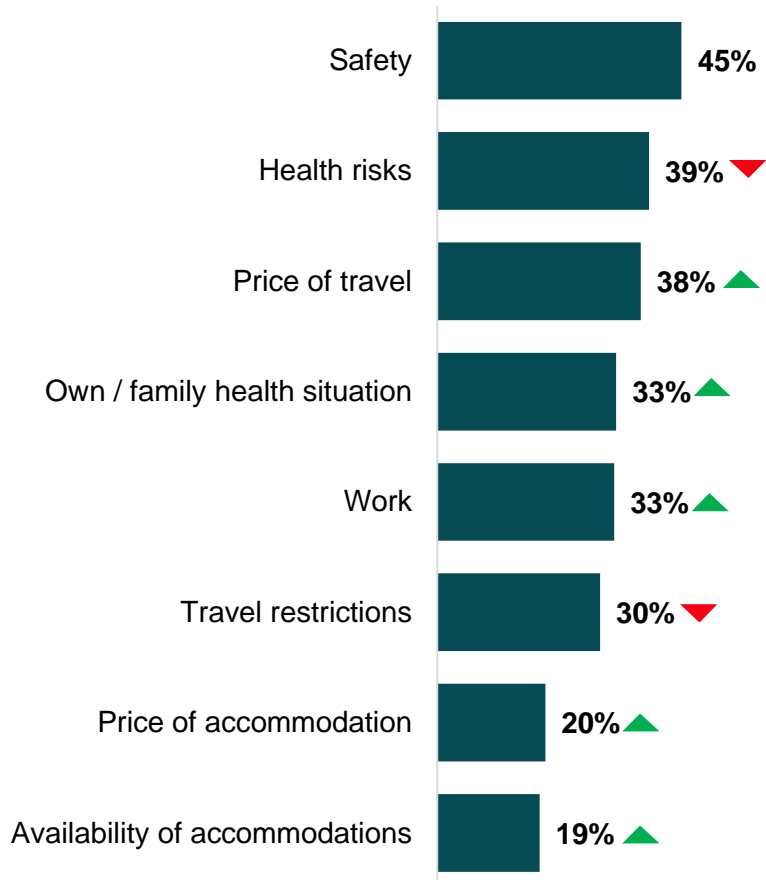


Factors Preventing Travel

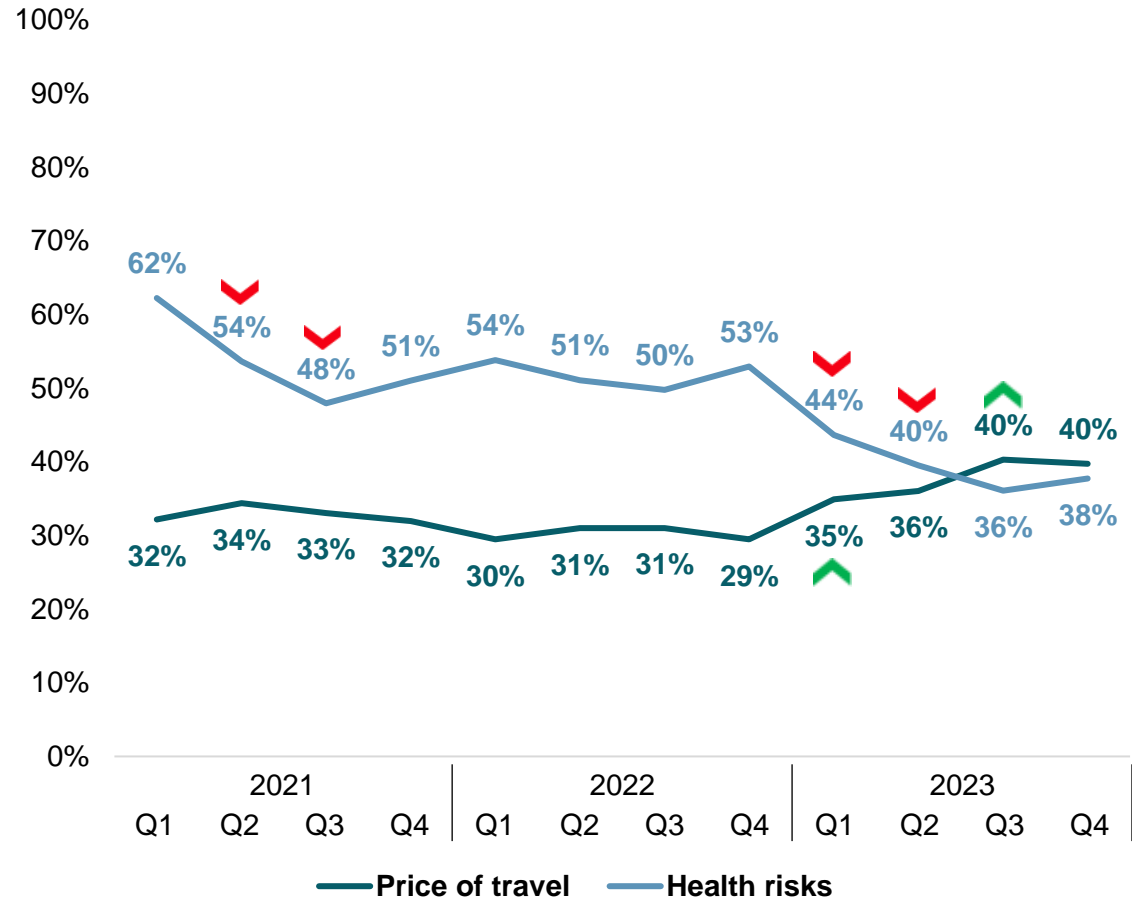


Safety has become the top factor preventing travel, as mentions of health risks declined, and by late 2023, the cost of travel also surpassed health concerns

Factors Preventing Travel



Select Factors Preventing Travel (Trended)

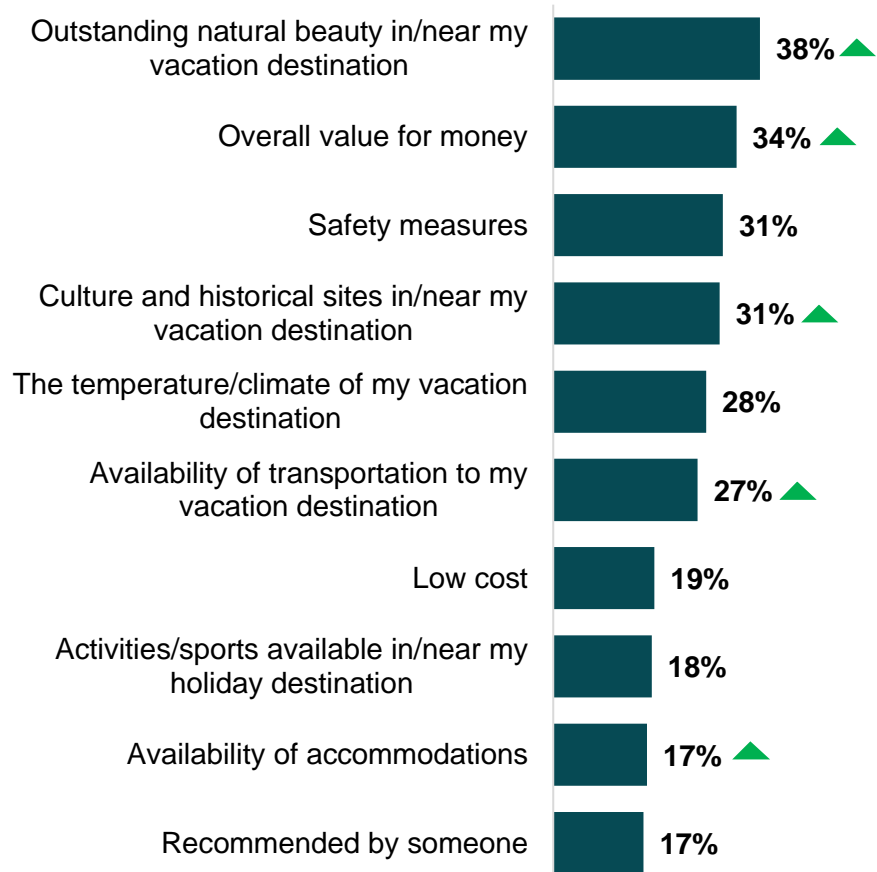


Destination Choice Influences

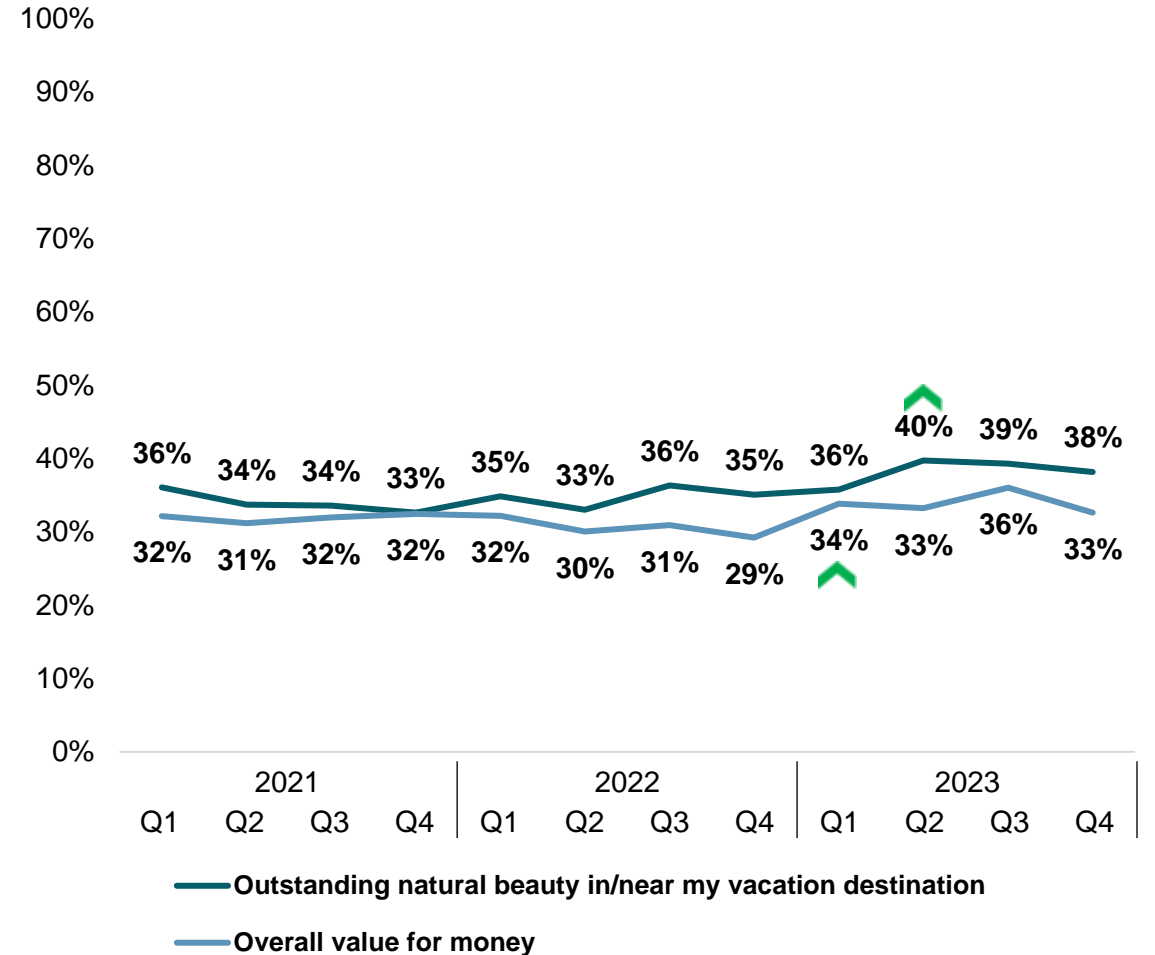


Natural beauty around a destination is the leading factor influencing destination choice while mentions of overall value for money and transportation availability increased amid rising travel costs. Safety measures remains a top concern, cited by three in ten respondents.

Destination Choice Influences (Top Responses)



Select Destination Choice Influences (Trended)



Favourite Types of Vacations

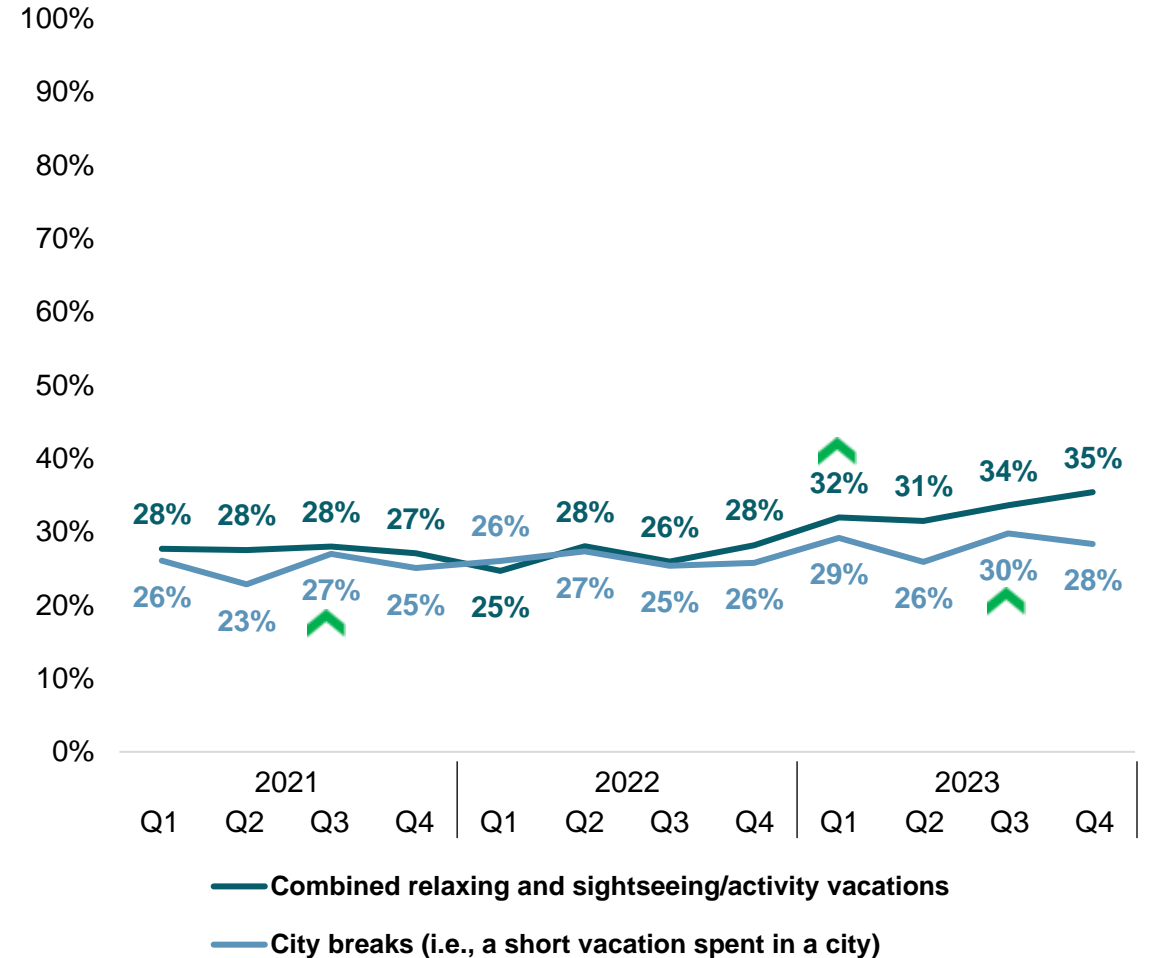


Chinese vacation preferences focus on variety, with combined relaxing and sightseeing trips being the most mentioned type. City-centric activities, including city breaks, culture and history, and multi-centered vacations, have shown year-over-year growth

Favourite Types of Vacations (Top Responses)



Select Favourite Types of Vacations (Trended)



2023 Base: Filtered China 18+ (n=4,683)
 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=917-1,322)
 Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.

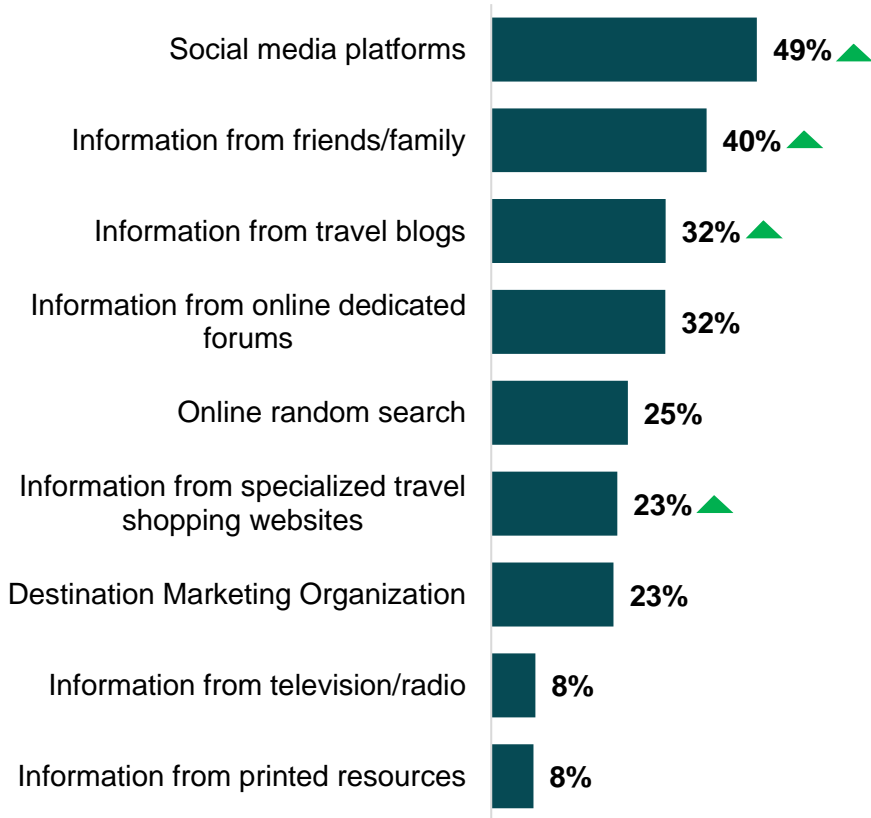


Vacation Planning Methods

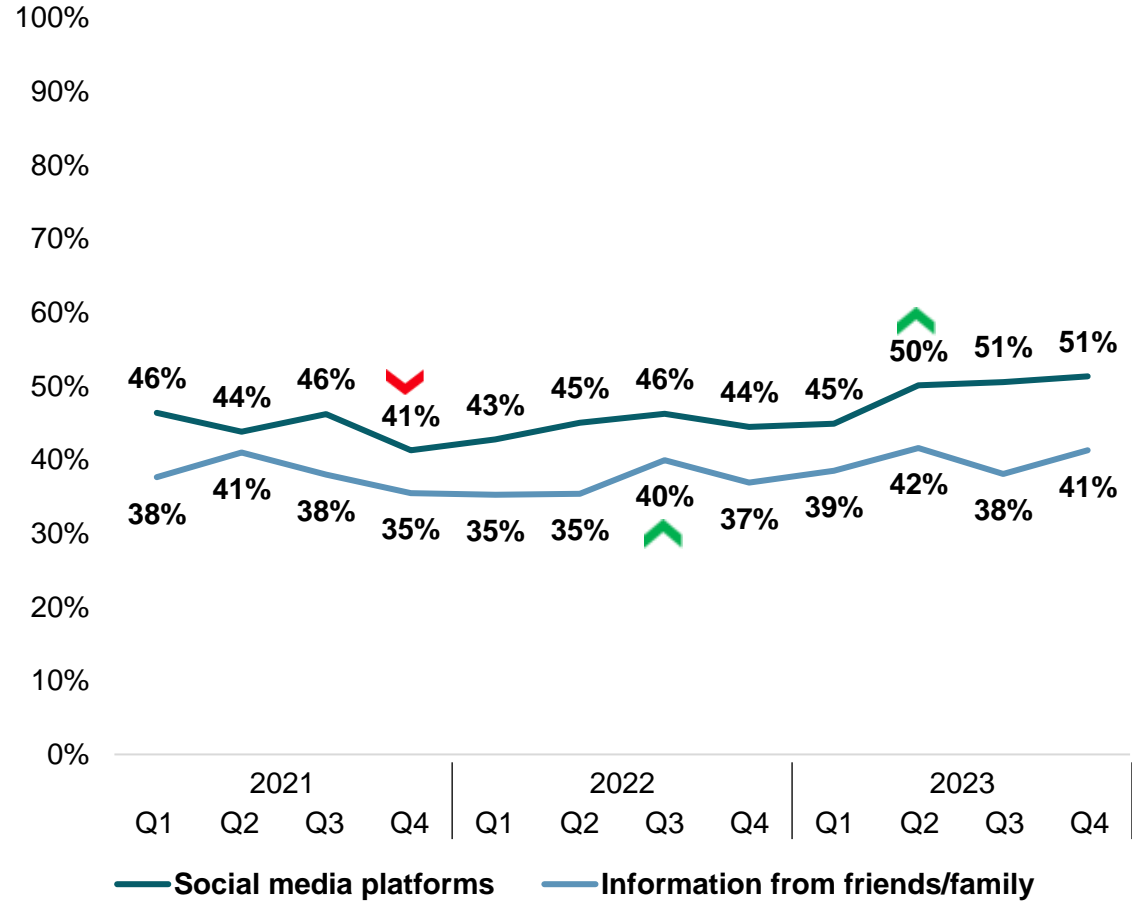


When planning trips, an increasing number of Chinese are leveraging social media and information from friends/family

Vacation Planning Methods



Select Vacation Planning Methods (Trended)



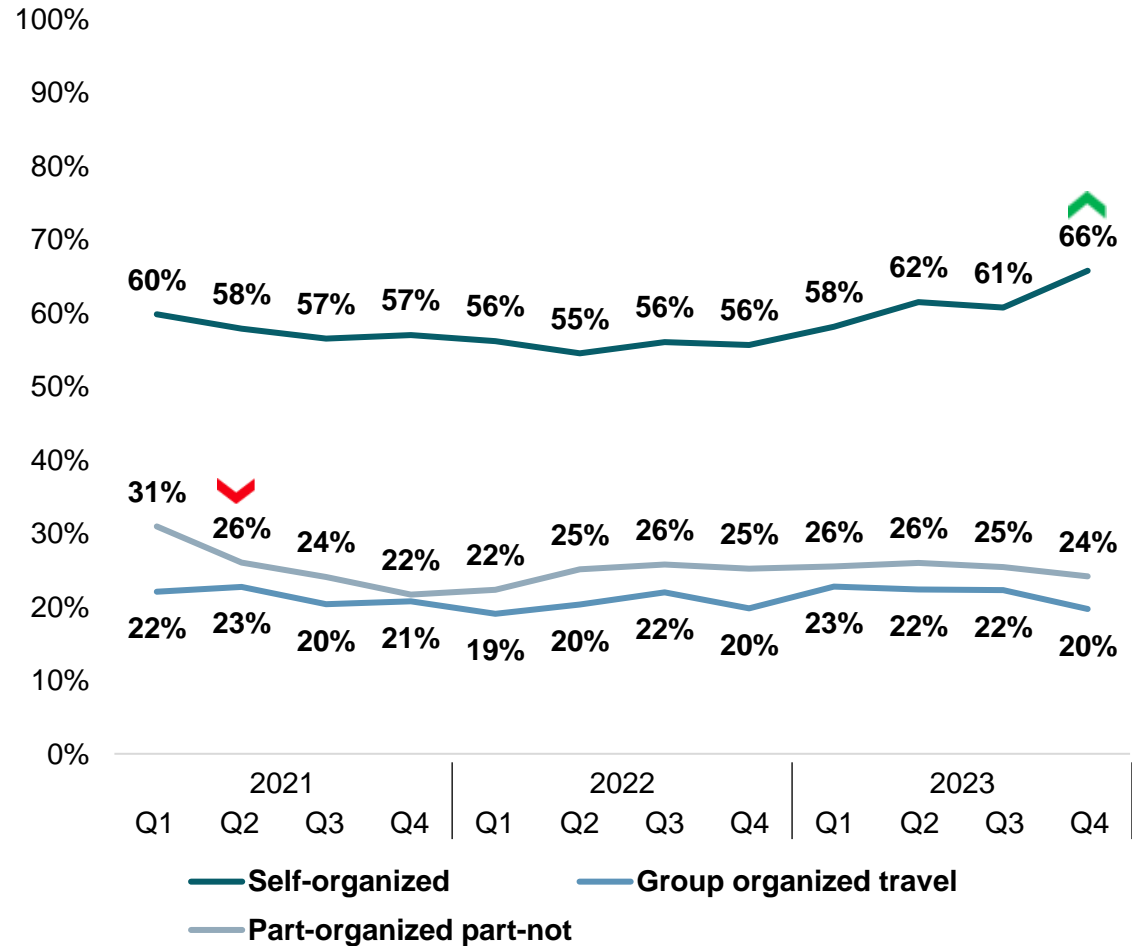
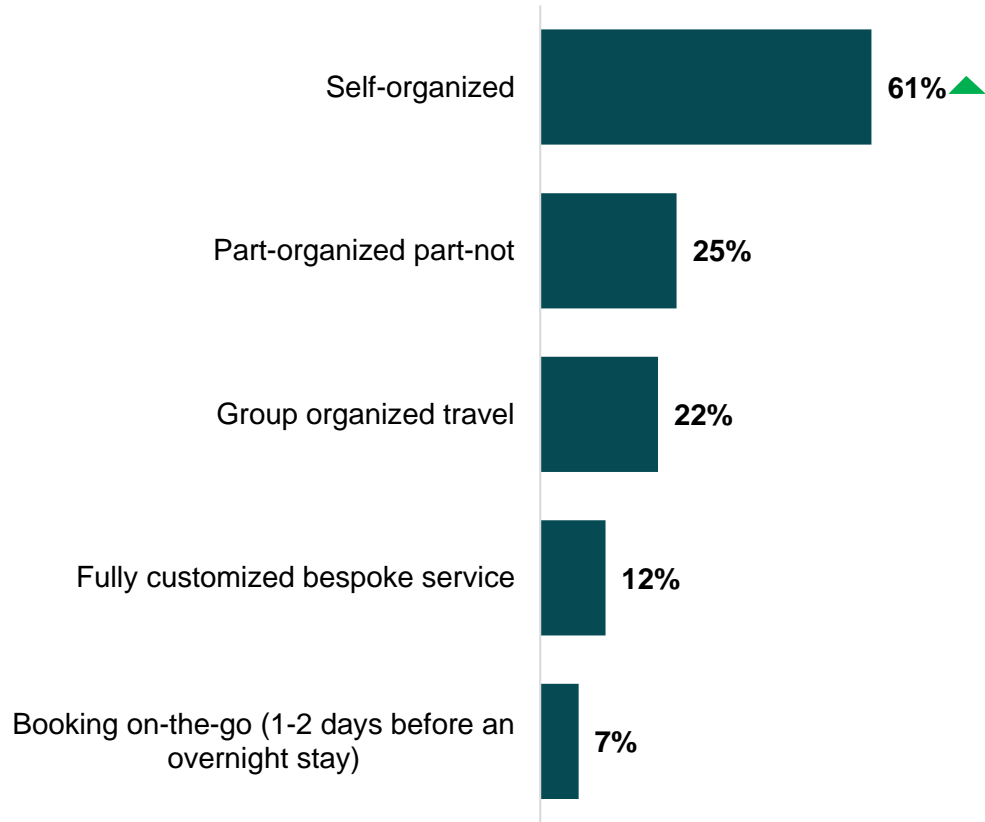
Vacation Organization Habits



Three in five Chinese typically plan their vacations themselves, while a quarter prefer partly organized vacations and one in five full organized group travel

Vacation Organization Habits

Select Vacation Organization Habits (Trended)



2023 Base: Filtered China 18+ (n=4,683)
 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=806-1,322)
 Q: Which of the following, if any, describe how you generally organize your vacations?
 Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

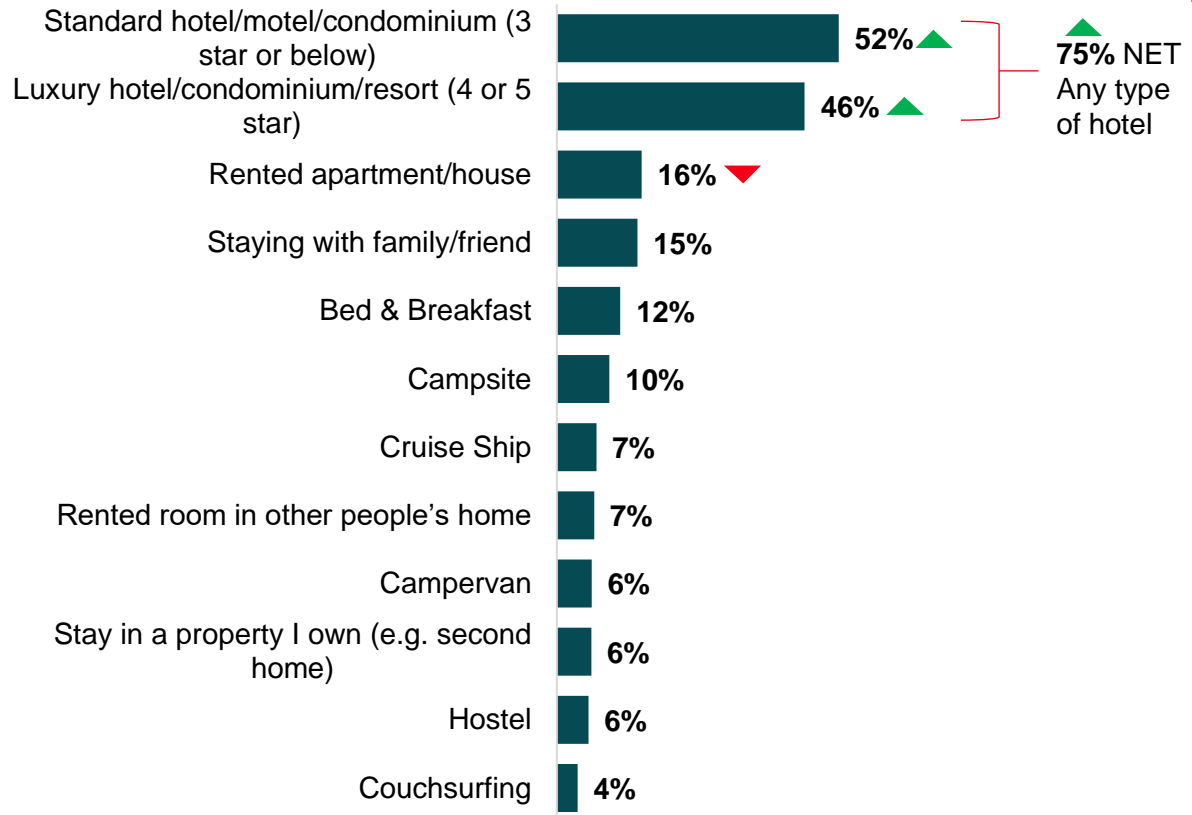


Accommodation Type Typically Stayed At

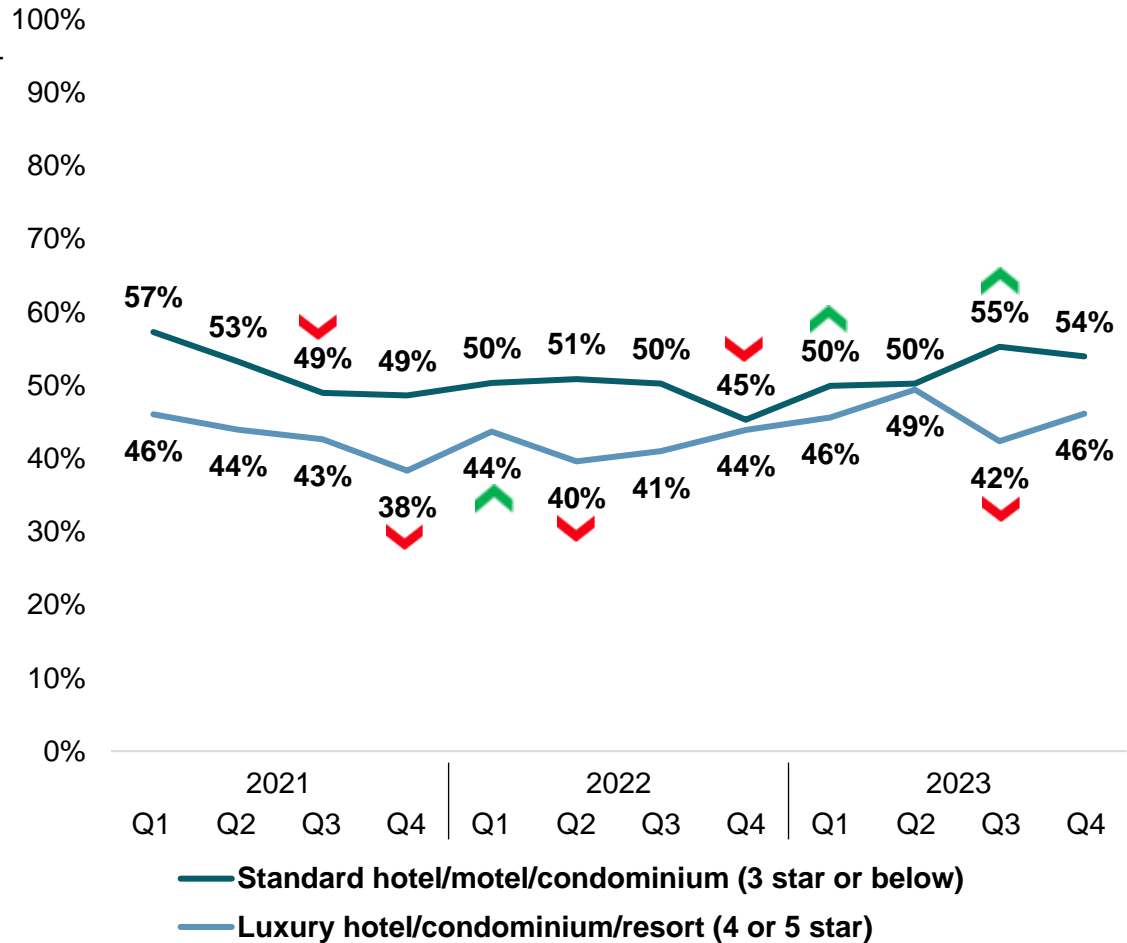


The vast majority of Chinese stay at hotels when travelling, with hotels being over four times more common than the next closest type of accommodation. Both standard and luxury level hotels have seen year-over-year growth

Accommodation Type Typically Stayed At



Select Accommodation Types (Trended)



2023 Base: Filtered China 18+ (n=4,683)
 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=806-1,322)
 Q: Which, if any, of the following types of accommodation do you typically stay in when you are on vacation? Please select all that apply

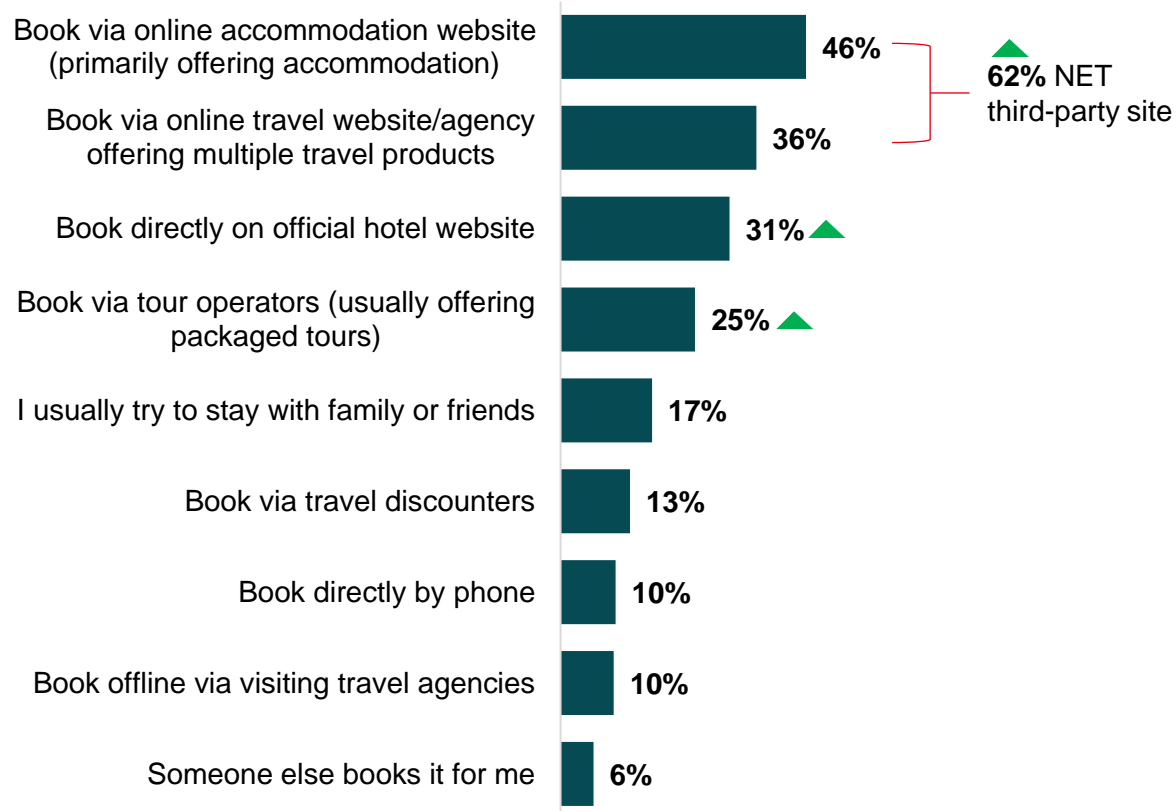
▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)



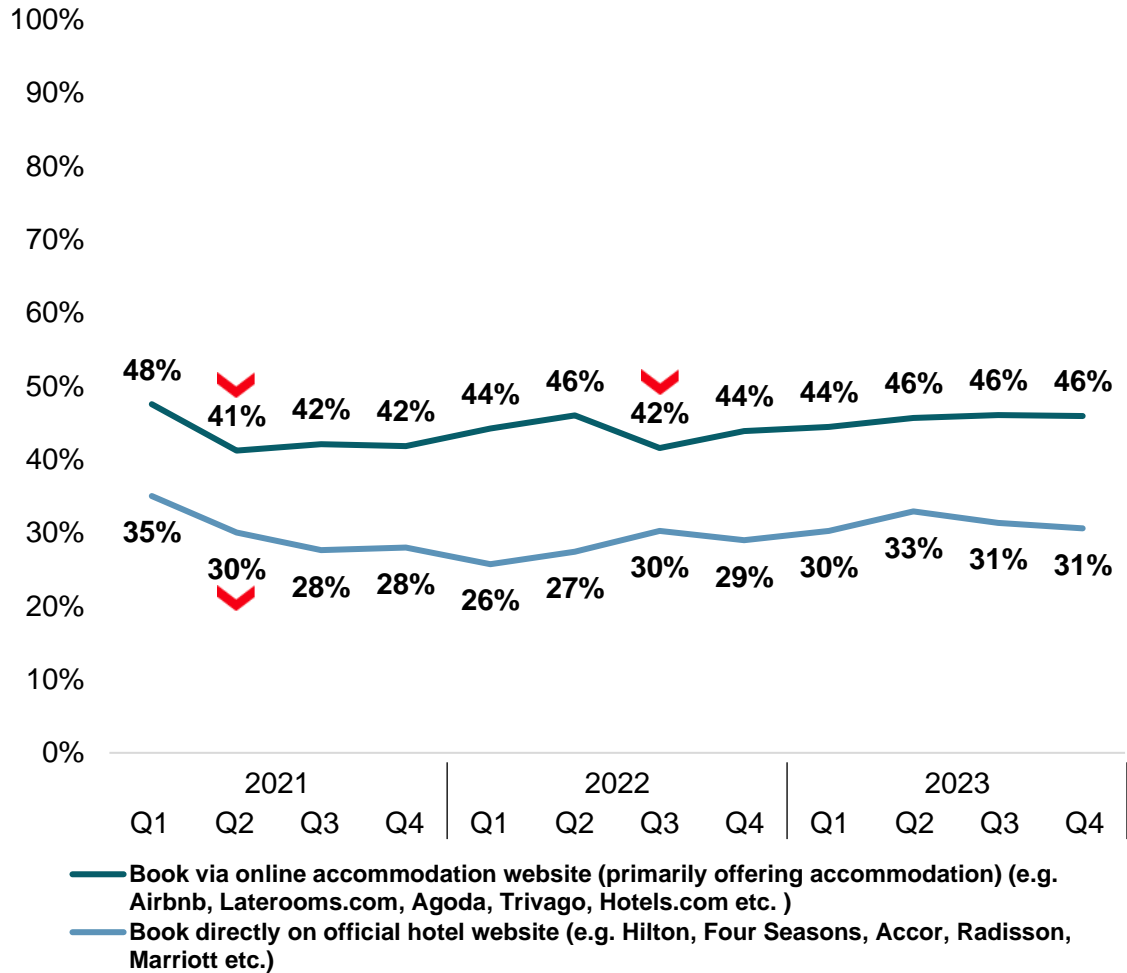
Accommodation Booking Methods

Chinese often opt for third-party sites when booking their accommodation. Potentially a result of the growth seen in hotel stays, more Chinese are using official hotel websites and tour operators when booking accommodation

Accommodation Booking Methods



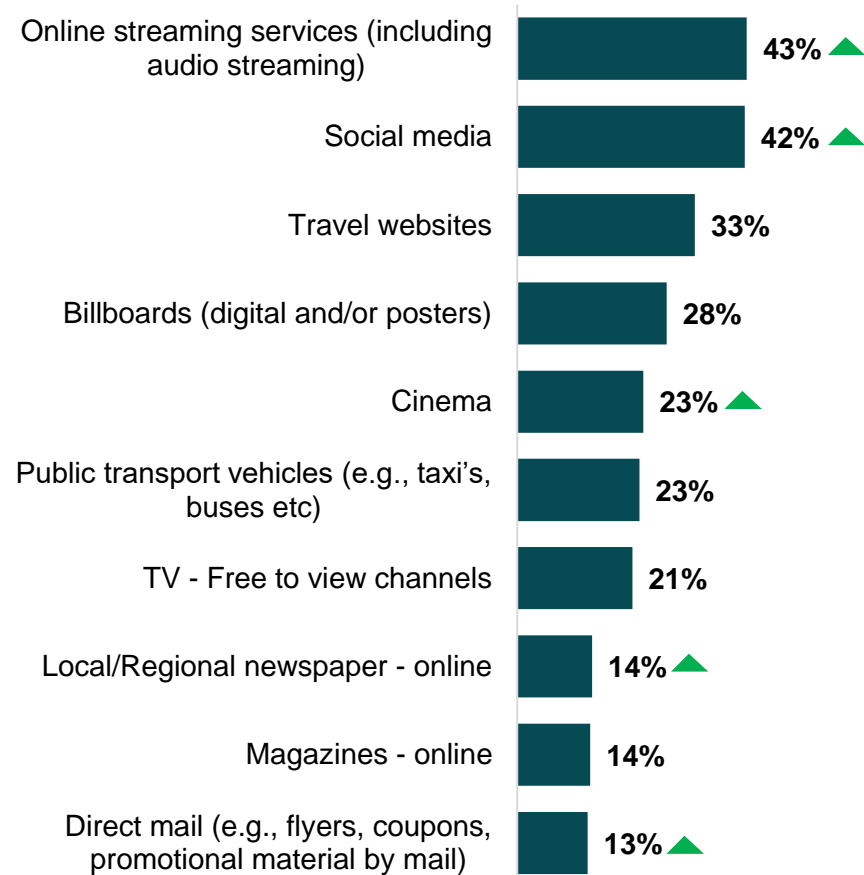
Select Accommodation Booking Methods (Trended)



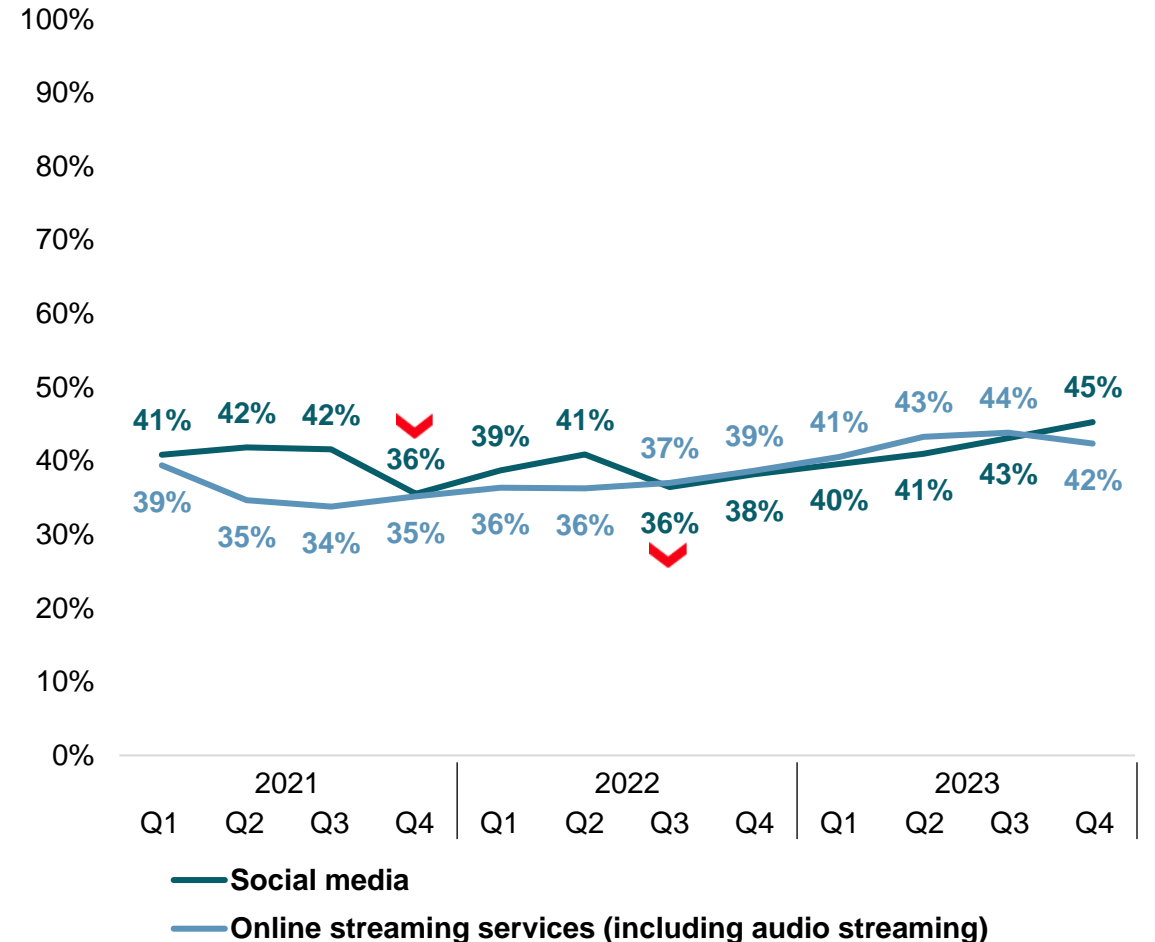
Effective Types of Travel Advertising

The most effective channels to reach Chinese travellers are through online streaming services and social media, both of which saw increased mentions in 2023

Effective Types of Travel Advertising (Top Responses)



Select Types of Travel Advertising (Trended)



2023 Base: Filtered China 18+ (n=4,683)
 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=163-1,322)
 Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.





Performance of Canada in Jul-Dec 2023 vs. Competitors



Yellowknife
Northwest Territories



Performance Scorecard for Canada

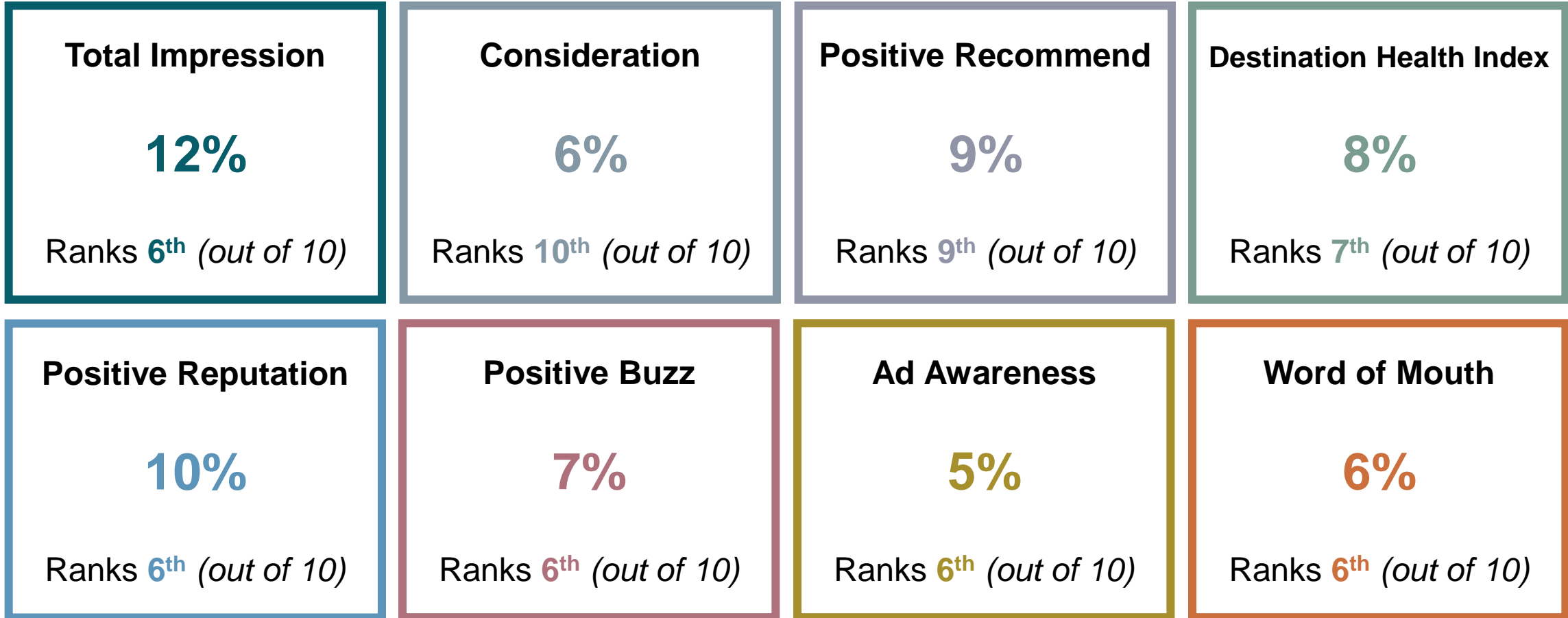
Metric		Definition		Question Text
Total Impression	→	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	→	Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?
Consideration	→	The number of consumers who would consider the destination when they are next in market to plan a vacation.	→	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
Positive Recommend	→	How likely consumers are to recommend a destination to a friend or colleague.	→	Which of the following destinations would you RECOMMEND to a friend or colleague?
Destination Health Index	→	Overall measure of a destination's brand health across several key destination health metrics.	→	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
Positive Reputation	→	How much consumers like and respect a destination.	→	Which of the following destinations do you regard as having a GOOD reputation for vacations?
Positive Buzz	→	How much positive news coverage consumers are hearing about a destination.	→	Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?
Ad Awareness	→	How much advertising consumers have seen for a destination.	→	Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
Word of Mouth	→	How much consumers are talking about a destination.	→	Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?



Performance Scorecard for Canada (July - December 2023)



Canada struggled in China in the second half of 2023, ranking outside the top three (out of 10 destinations) in all metrics and in the bottom two for both consideration and recommendations, potentially being affected by the ban on group travel to Canada



July - December 2023 Scores



New Zealand, Australia and France lead the competitive set in all metrics

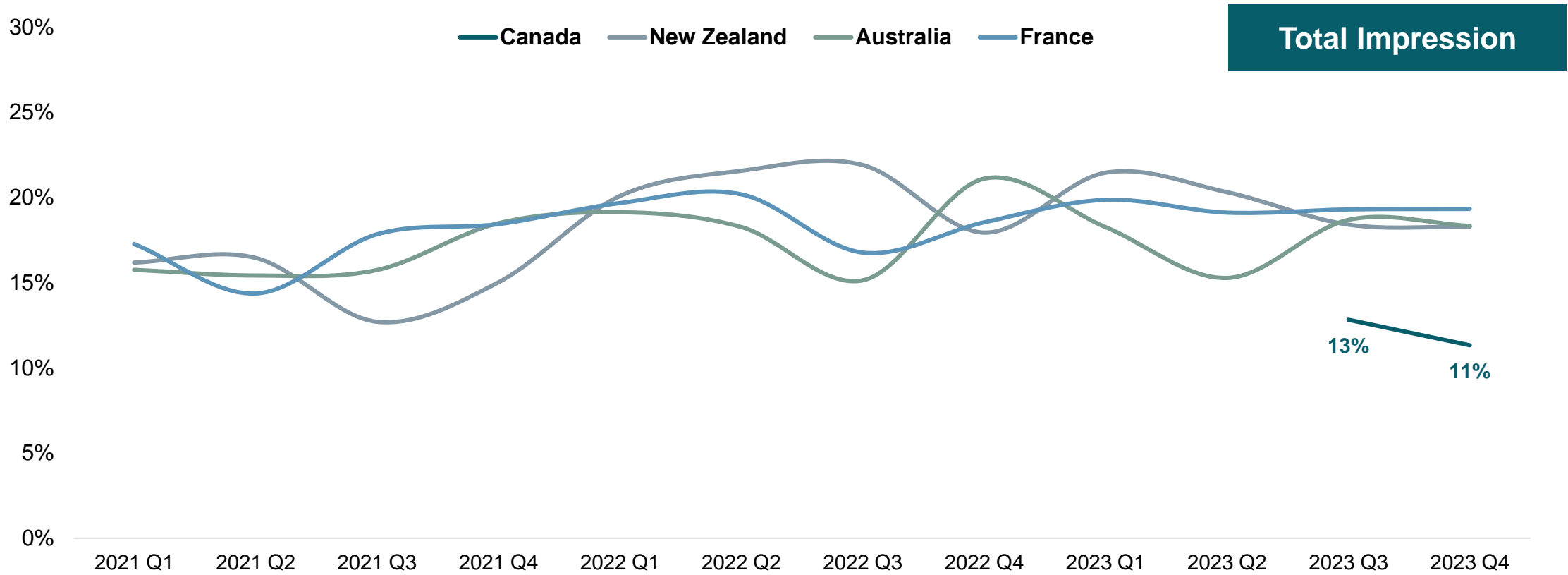
	Canada	New Zealand	Australia	France	Italy	Spain	Germany	Netherlands	UK	US
Total Impression	12%	18%	19%	19%	14%	10%	12%	11%	10%	15%
Consideration	6%	14%	12%	10%	8%	8% ▲	7%	7%	7%	6%
Positive Recommend	9%	18%	14%	14%	12%	8%	10%	10% ▲	9%	9%
Destination Health Index	8%	15%	13%	12%	10%	7%	9%	8% ▲	8%	8%
Positive Reputation	10%	20%	15%	14%	10%	8%	10%	10% ▲	9%	8%
Positive Buzz	7%	12%	11%	9%	7%	5%	7%	6%	7%	8%
Ad Awareness	5%	10%	9%	7%	6%	4%	4%	4%	4%	6%
Word of Mouth	6%	9%	10%	8%	6%	4%	5% ▲	4%	4%	6%



Total Impression: Positive + Negative Impression (Trended)



France, Australia and New Zealand have been lead total impression rankings. Mentions of Canada are comparatively low, but in line with many European destinations



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#6	#7
Top Ranked Destination	France	US	France	US	New Zealand	New Zealand	New Zealand	Australia	New Zealand	New Zealand	France	France

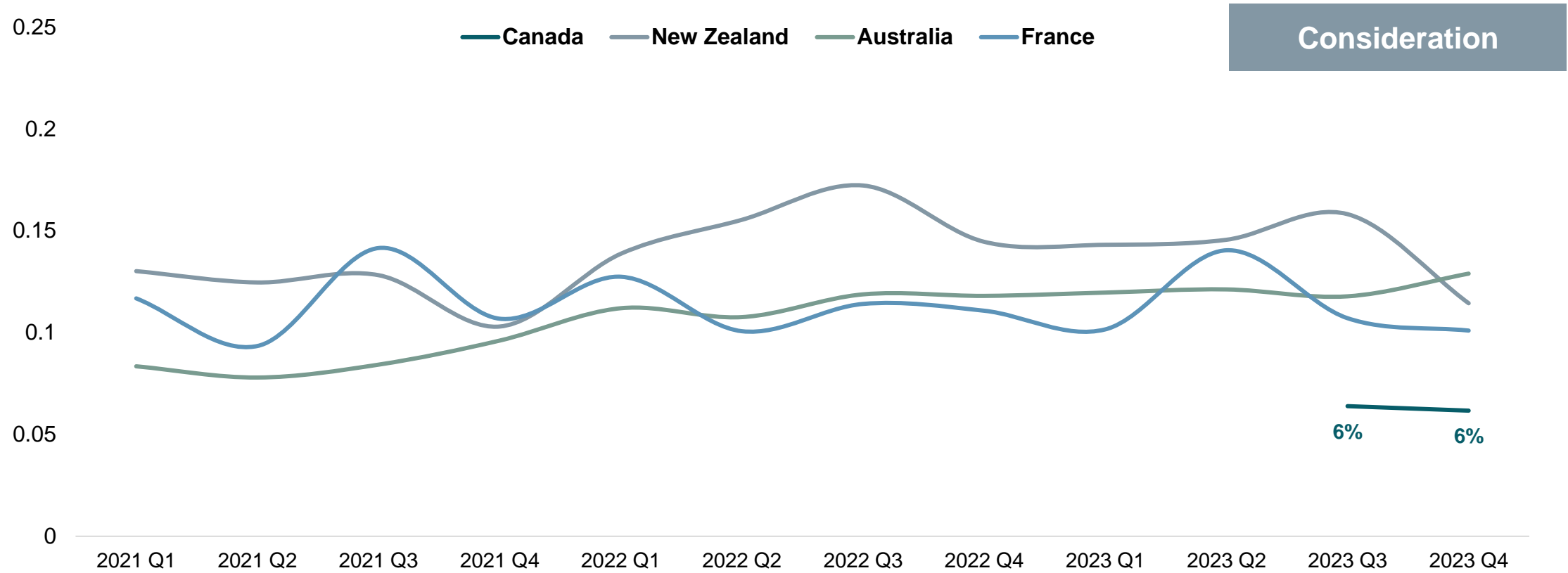
23 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=218-608)
 Q: Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?



Consideration (Trended)



Consideration of Canada scores last within the competitive set, likely being hindered by the Chinese ban on group tours to Canada



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#10	#9
Top Ranked Destination	New Zealand	New Zealand	France	France	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	Australia

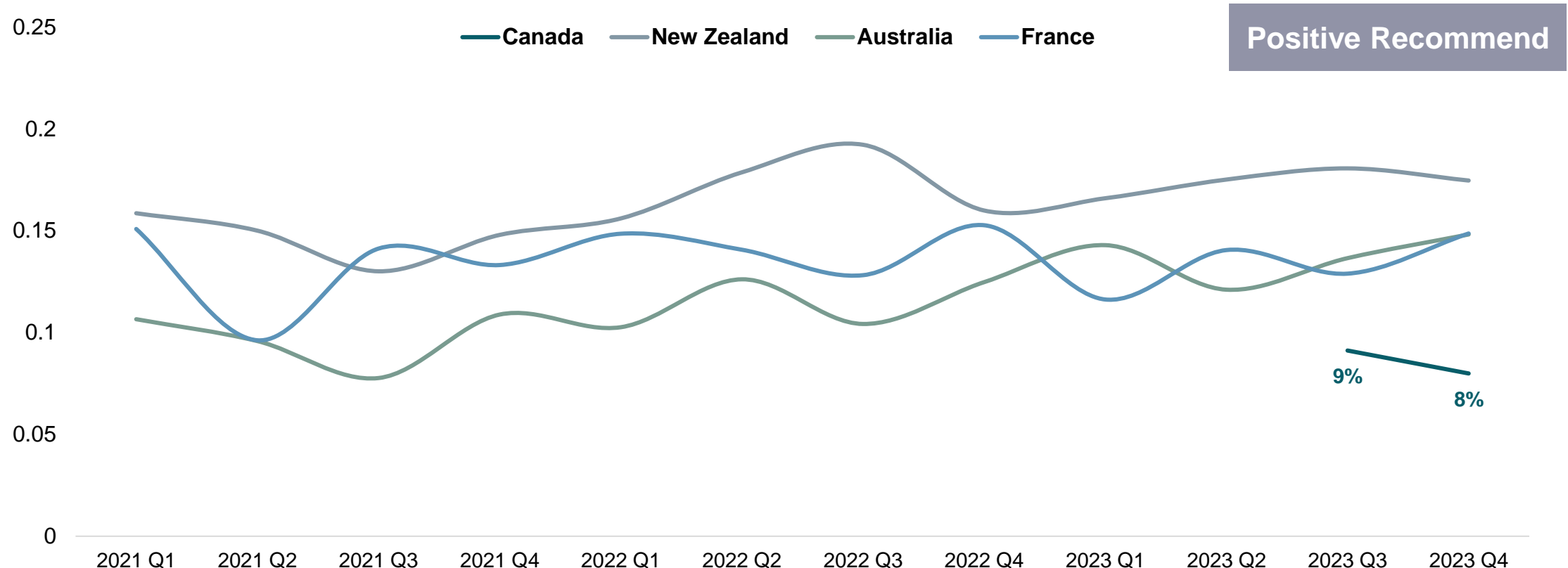
24 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=218-608)
 Q: When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?



Positive Recommend (Trended)



Canada's low consideration score is accompanied by a low proportion of recommendations, with fewer than one in ten Chinese saying that they would recommend Canada as a destination



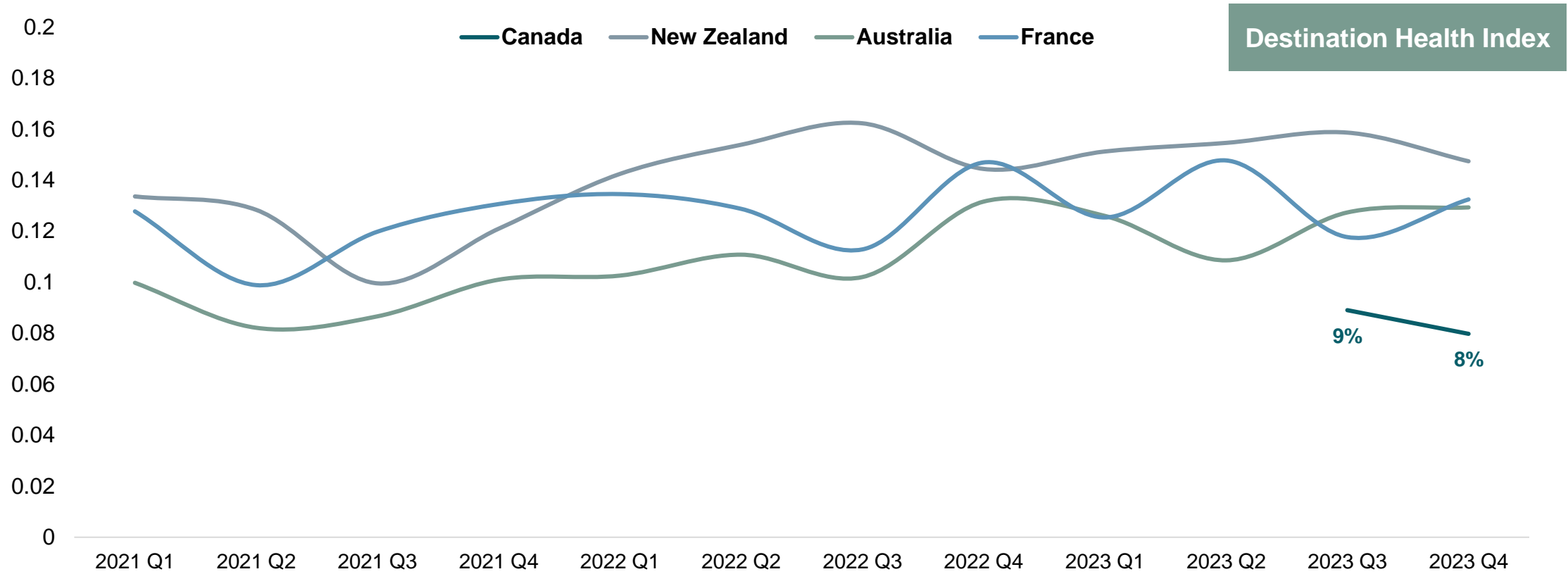
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#7	#8
Top Ranked Destination	New Zealand	New Zealand	France	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand



Destination Health Index (Trended)



Despite initially ranking eighth in overall destination health in 2023, Canada rose to sixth place in Q4 as competitors' scores declined



Canada's Rank	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#8	#6
Top Ranked Destination	New Zealand	New Zealand	France	France	New Zealand	New Zealand	New Zealand	France	New Zealand	New Zealand	New Zealand	New Zealand

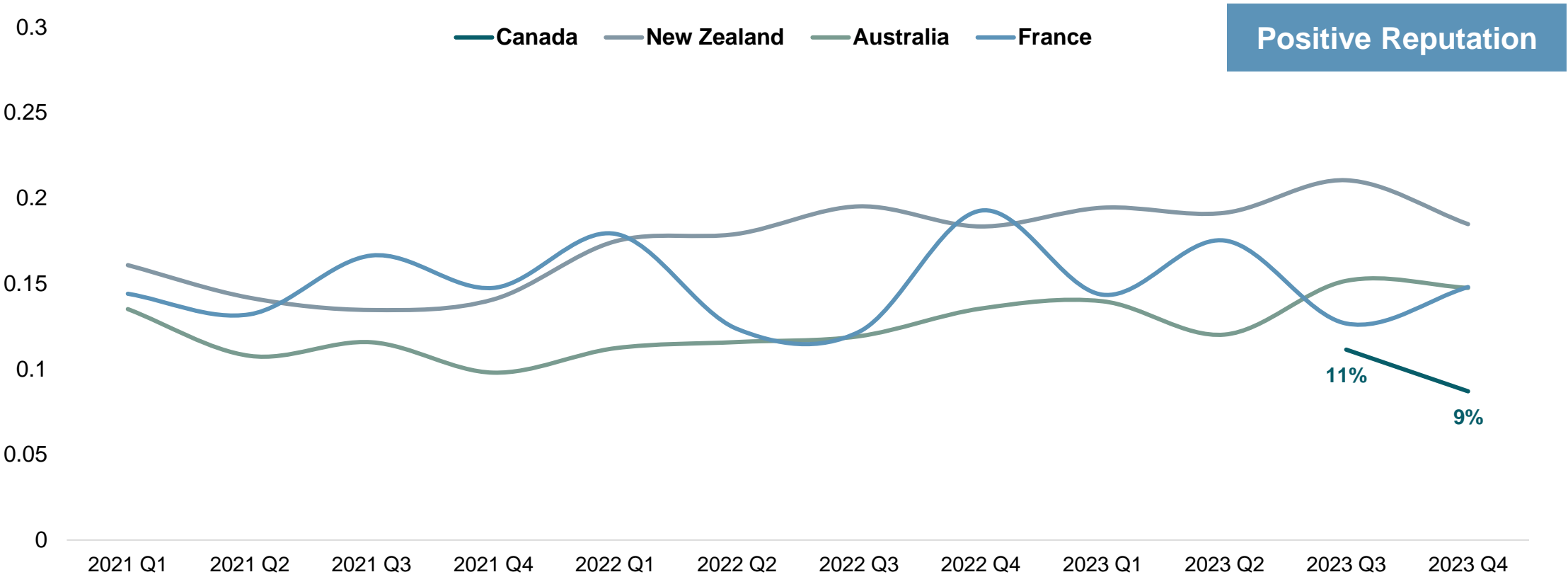
26 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=218-608)
 Q: Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend



Positive Reputation (Trended)



Despite low consideration and recommendation scores, Canada's reputation for vacations ranks as mid-tier

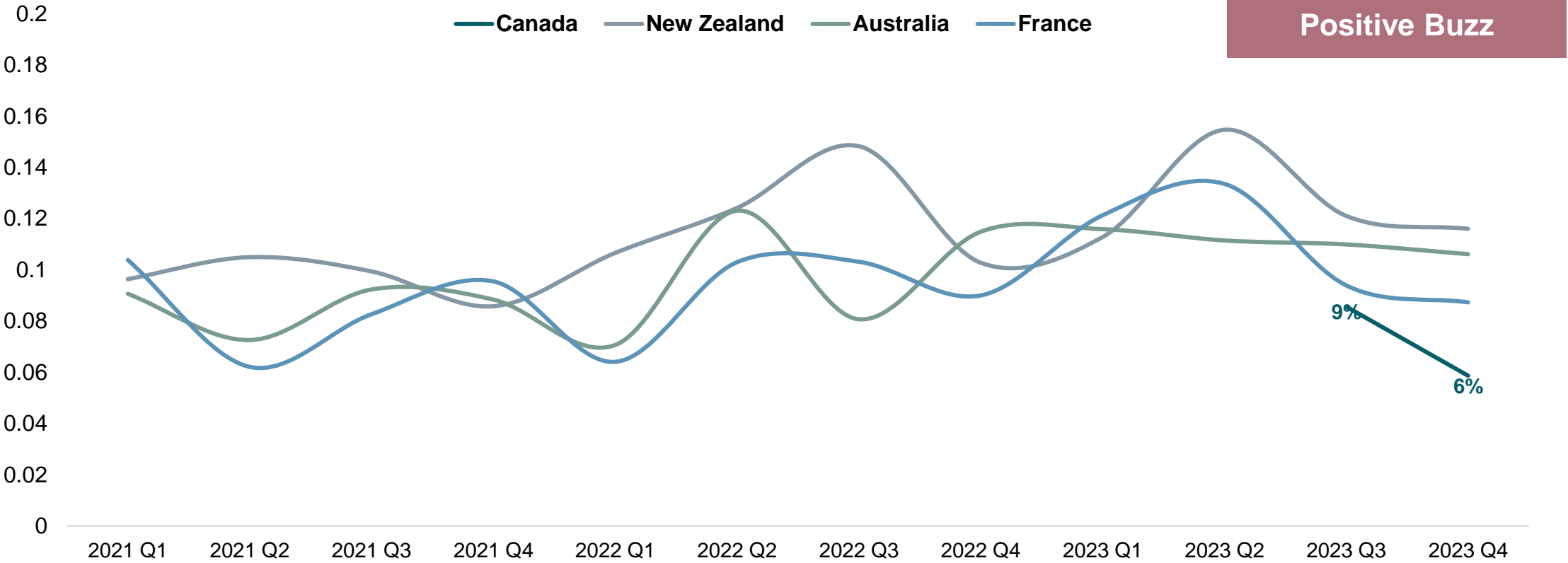


	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#4	#6
Top Ranked Destination	New Zealand	New Zealand	France	France	France	New Zealand	New Zealand	France	New Zealand	New Zealand	New Zealand	New Zealand



Positive Buzz (Trended)

Media sentiment towards Canada ranks as mid-tier, however, scores across the competitive set are low



Canada's Rank	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#5	#6
Top Ranked Destination	France	New Zealand	New Zealand	France	New Zealand	New Zealand	New Zealand	Australia	France	New Zealand	New Zealand	New Zealand

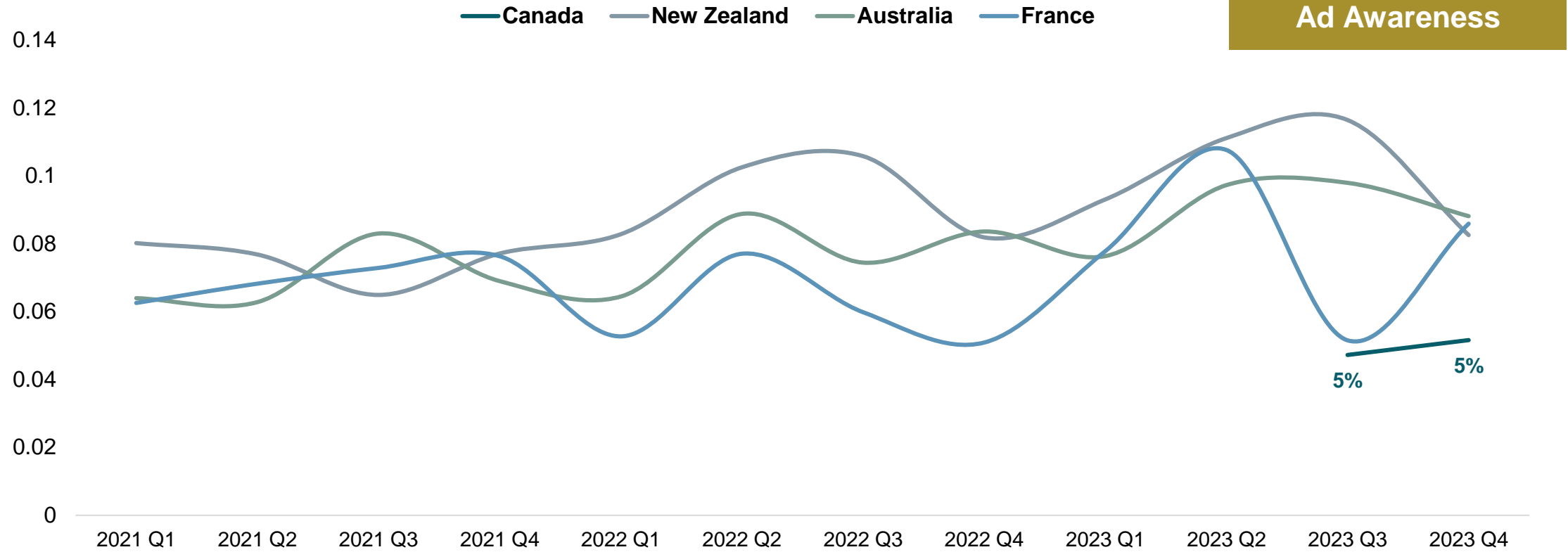
28 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=218-608)
 Q: Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?



Ad Awareness (Trended)



Despite only one in twenty Chinese recalling Canada's advertisements, it ranked fourth in the competitive set in 2023 Q4, trailing behind only New Zealand, Australia, and France



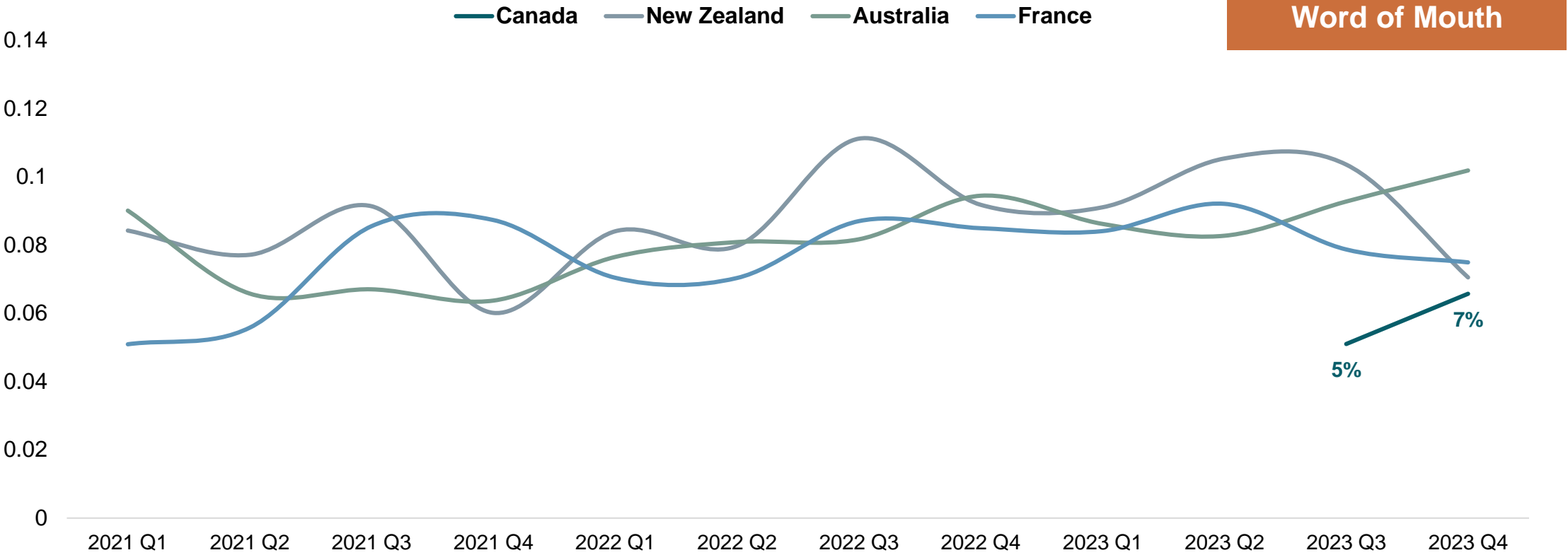
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#8	#4
Top Ranked Destination	New Zealand	New Zealand	Australia	New Zealand	New Zealand	New Zealand	New Zealand	Australia	New Zealand	New Zealand	New Zealand	Australia



Word of Mouth (Trended)



Despite the increase in planned international vacations, discussions about long-haul destinations are notably low, with all competitors scoring at 10% or below



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	#7	#4
Top Ranked Destination	Australia	New Zealand	New Zealand	France	US	Australia	New Zealand	Australia	New Zealand	New Zealand	New Zealand	Australia

30 2021-2023 Quarterly Trending Base Range: Filtered China 18+ (n=218-608)
 Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?



THANK YOU

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



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