CONFIDENTIAL

AUSTRALIA STRATEGIC REPORT

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

DESTINATION CANADA

CANADIAN TOURISM DATA collective

Focus of This Report

- *Study Overview*
- *Key Insights*
- *Overall Travel Outlook & Trends*
- *Canada vs. Competitive Destinations*
- *Increasing Fall & Winter Visitation*
- *Sustainability*
- *Indigenous Tourism*

Study Overview: Australia Market

The target population are residents aged 18 years and older who have taken a long-haul holiday 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.

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn $100,000+ AUD household income per year or are retired.

Timing of Fieldwork

December 5th – 22nd 2023

Geographical Definition
for Qualified Trips

Outside of: Australia, New Zealand and the Pacific Islands

Sample Distribution

Sample distribution:	**National**
High Value Guest (HVG) Audience:	**431**
Other travellers:	**1159**
Total sample size:	**1590**

TOTAL AU PERSPECTIVE
Where applicable, insights are drawn from two of YouGov's proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of Total Australians 18+

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.
  - As a result, no trending is available for the Australian market.

Key Insights

Travel Outlook & Trends

- The **appetite for travel** in Australia is **high** for both **domestic** and **international vacations, with incidence of planned international vacations surging over the last 2 years**
- **Australian HVGs** are equally likely to take an international holiday and domestic holiday trip but take domestic trips more frequently. One half **add personal holidays** to business trips or choose to **work remotely** during holidays
- **Travel demand** is highest in the **Summer and Fall months**, when ~4.8M typically travel
- When Australians travel, **flights and accommodations** are most likely **booked through a travel agent or tour operator.** Use of **online booking engines** is more prevalent among **travellers to Canada**
- Travellers express a **moderate level of concern** for weather-related impacts, but higher concerns for **international conflict or unrest** on travel plans. **HVG**s are **more likely** to be very concerned about both, and were more likely to have **changed travel plans** as a result
- **Trying local food and drinks**, **nature activities, markets, and historical or art sites** are the **top interests** for Australian travellers while on holiday. **HVGs** are generally **less interested in specific activities**

Canada vs. Competitive Set

- **Past visitation** for **Canada trails behind** most competitive destinations, ranking 8th in terms of ever visited by total Australian travellers and HVGs
- That said, **past visitors** have a **strong affinity** for Canada, with NPS scores ranking 3rd among total travellers and 2nd among HVGs. As well, Canada's **NPS is highest** among those who visited in the **Winter**, followed closely by Fall
- Furthermore, syndicated data suggests that Australians are becoming more interested in visiting new destinations
- **The next 2-year immediate potential for Canada is 3.4M**, including 1.4M HVGs
- Canada ranks 4th for destinations being considered on an unaided basis, behind Japan, the UK and the US
- Currently, **Canada** stands out as ***being environmentally-friendly, offering physically challenging and great outdoor activities*** and ***being a great place to see wildlife***
- Among the **brand value statements**, **Canada dominates on almost all statements**, including: *being a place with wide-open landscapes, allows one to enjoy nature close to cities, embraces cultural diversity, people are welcoming, open-minded* and *is a good place to live*

Key Insights

Key Drivers & Opportunities

- The **top drivers of consideration** are: ***being a place to visit with friends/family and trending as a must-visit spot*** **among total Australian travellers and HVG audience**
- **Secondary drivers** among total travellers include: *offering good value for money, being a good place to live*, and *having a culture I want to experience*; while *offering good value for money* and *being a great place for holidays that avoid surprises* could also drive consideration among HVGs
- **Several dimensions represent white space** in which no single destination dominates. Compared to top drivers of destination consideration, the following could be **key opportunity areas for Canada to focus on**: *being a place to visit with my friends or family*
- There is **also opportunity** to drive consideration to visit by **boosting perceptions of highly influential drivers** like: *being a good place to live, offering good value for money,* and *having a culture I want to experience* (a weakness)

Fall/Winter Travel

- There is an **opportunity for Canada to attract more visitors** in the Fall and Winter, with 4.8M and 4.5M typically travelling during these months respectively
- **Canada** is a **top destination** that comes to mind for **Winter travel** (competing most closely with Japan) and **ranks third** as a **Fall destination** (behind Japan and the US)
- The **two-year immediate potential** for Canada is **comparable** for the **Fall (2.8M)** and **Winter (2.4M) season**
- Leveraging **natural attractions**, **Northern lights** and **city sightseeing** could help **increase consideration in the Fall/Winter months** as they are top experiences that travellers in Australia are interested in while visiting Canada during these seasons
- That said, **HVGs** are less interested in the Northern lights and are **more focused on physical outdoor activities or experiences** when visiting Canada during the Fall and Winter. They specifically **mention activities** as a motivator for Fall travel, and the unavailability of activities as a main barrier

Key Insights

Sustainable Travel

- **Sustainability** is only a **moderate priority** for most Australian travellers, and **perceptions of *being environmentally friendly*** and ***socially responsible*** are **not strong drivers** of destination consideration
- That said, **over four in ten associate** Canada with *being a socially responsible and environmentally friendly destination*
- **Efforts that carry the greatest importance** are the knowledge that the local culture is not negatively impacted by tourism and the conservation of natural areas. Of note, **HVGs place higher importance** on knowing their money is directly supporting the local community and the community is open and welcoming to travellers
- The **biggest barriers** to sustainable travel are the perception that it is **more expensive** and there is **a lack of information around it**. **HVGs are more likely** to say sustainable travel **doesn't meet their needs for comfort or luxury**, and **is too time consuming**
- To **capitalize** on this opportunity, **communications highlighting** Canada's **sustainability efforts** and **educating travellers** could play a crucial role in leveraging this area to increase consideration of Canada as a destination

Indigenous Tourism

- **Australia** is by far the destination **most associated** with **Indigenous tourism,** followed by New Zealand; **Canada ranks 3rd**
- The **culture**, followed by **exploring tourist places/attractions** are the **top activities** that come to mind when it comes to Indigenous tourism
- When thinking of Indigenous cultural experiences and tourism activities in Canada, **interest is strongest** for **more general experiences** such as sampling food and drink, excursions in nature and visiting museums
- **Interest is lower** for **learning about residential schools** or activities such as **hunting/fishing with an Indigenous outfitter**
- **HVGs** have a **higher interest overall** in Indigenous activities

Overall Travel Outlook & Trends

Types of Travel Trips

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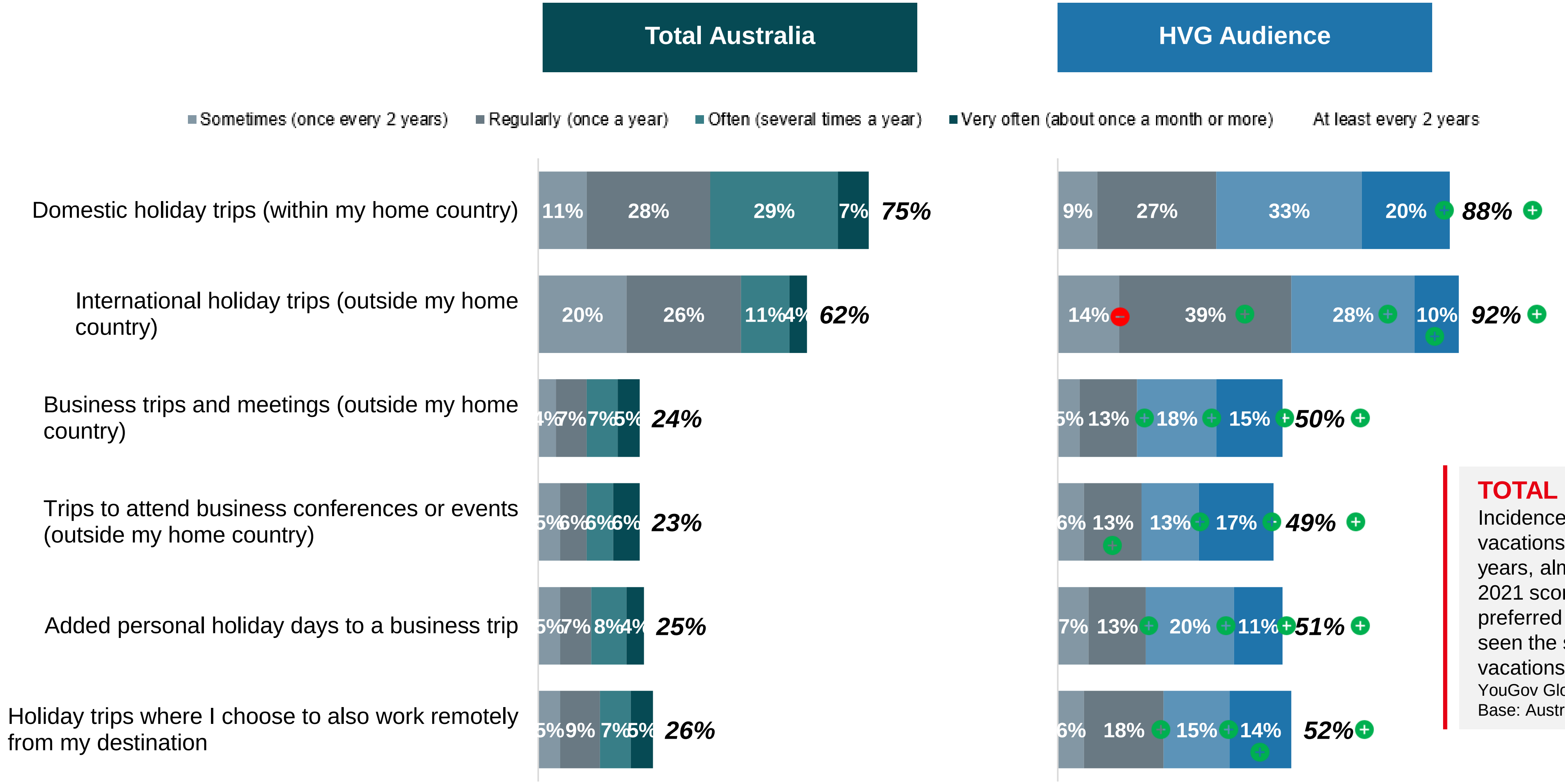
Among total Australian travellers, domestic holiday trips are taken more frequently than international holidays. While HVGs are equally like to take an international holiday trip as a domestic holiday trip, domestic holiday trips are taken with greater frequency. At least one half of HVGs add personal holidays to business trips or choose to work remotely during holidays.



TOTAL AUSTRALIA

Incidence of planned international vacations has surged over the last two years, almost doubling compared to 2021 scores. Domestic vacations are still preferred by Australians, but has not seen the same growth as international vacations

YouGov Global Travel Profiles (Australia) – 2023
Base: Australians 18+

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
A6. How often do you typically travel on each of the following types of trips?

+ / – = significantly higher/lower result (vs. Total)

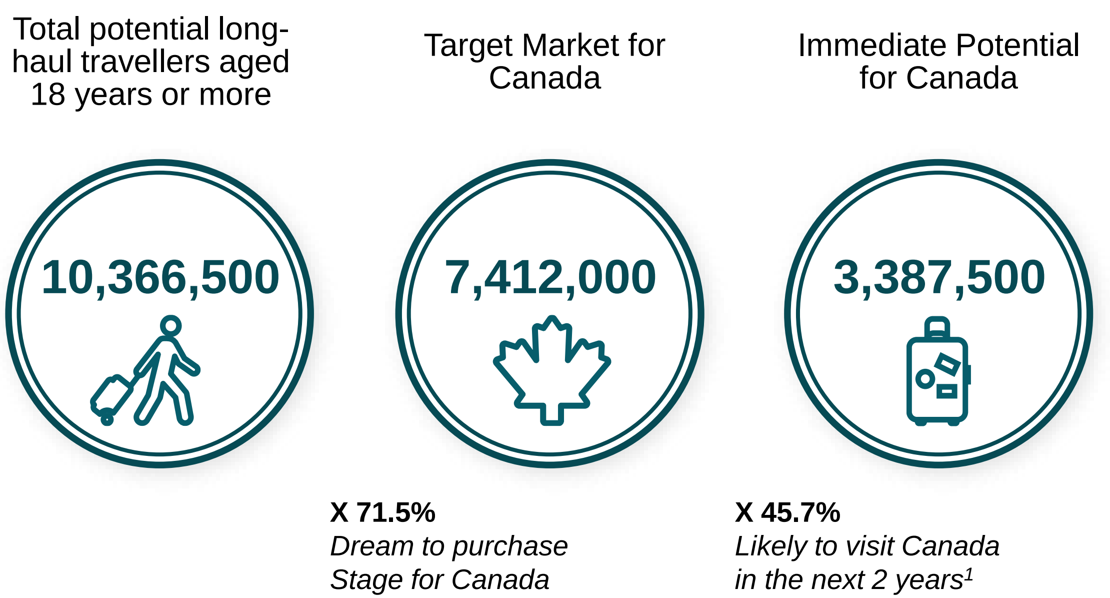
Overall Demand for Long-Haul Holiday Travel

Total Population		Long-Haul Traveller Incidence Rate		Size of Target Market		HVG		Size of HVG Population
20,129,000	x	51.5%	=	10,366,500	x	27.0%	=	2,799,000

Total Australia | **HVG Audience**

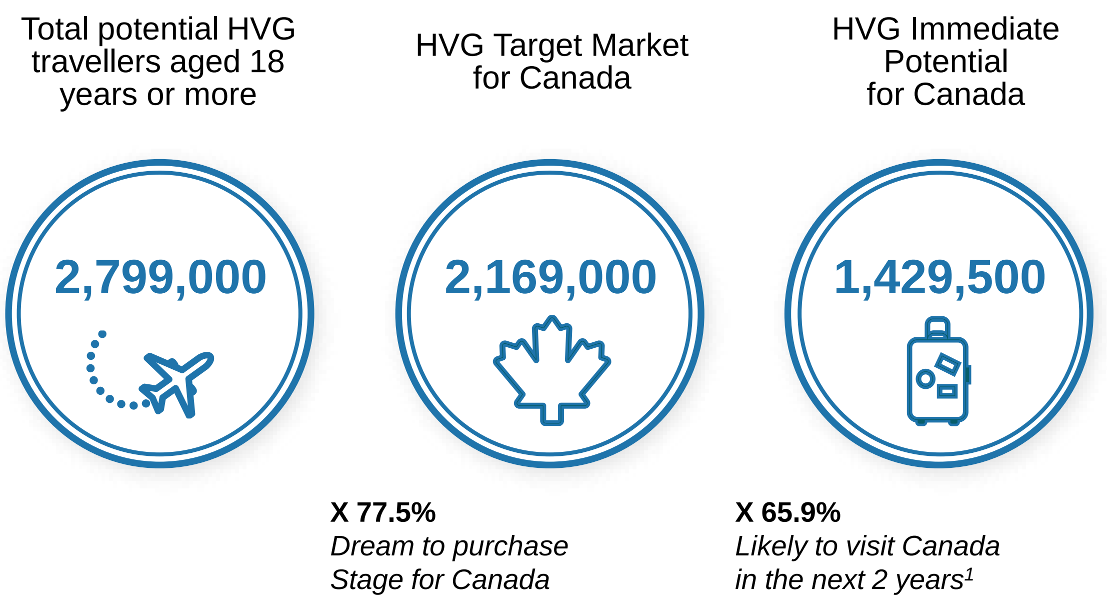
Potential Market Size

Total Australia



Base: Target market for Canada = long-haul holiday travellers (past 3 years or next 2 years) (n=1590); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1136)

HVG Audience



Base: Target market for Canada = long-haul holiday travellers (past 3 years or next 2 years), HVG Audience (n=431); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=333)

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)

Travel Agents/Tour Operator Usage For Recent Trip

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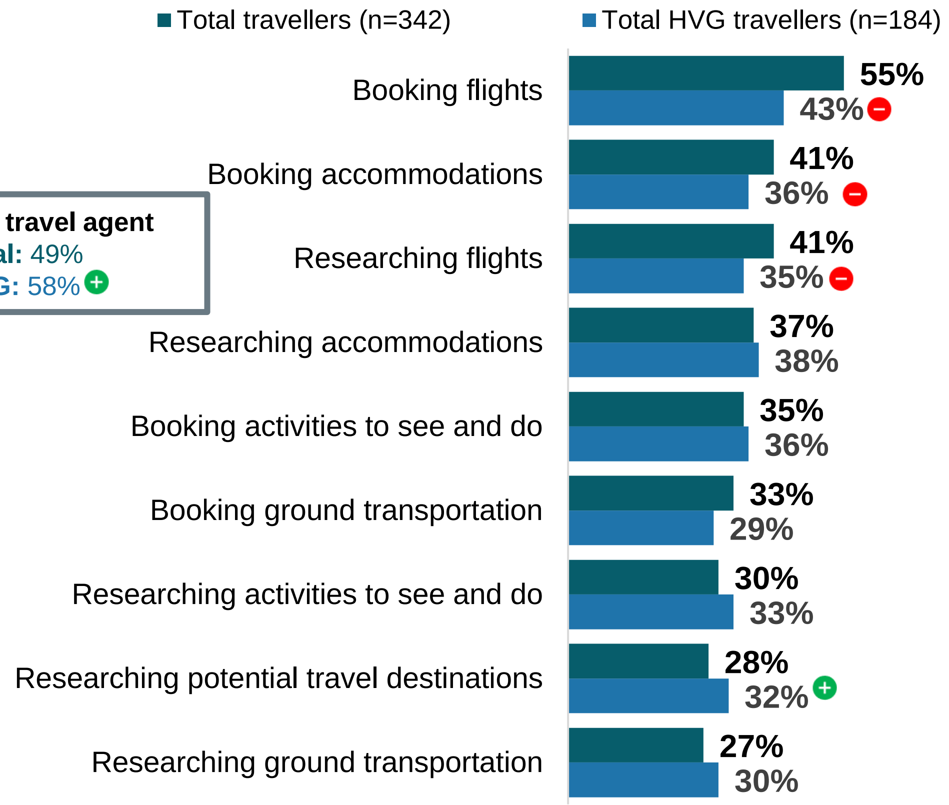
HVGs and travellers to Canada show a greater preference for utilizing travel agents compared to total long-haul travellers. However, travellers to Canada are less likely to use them for booking services.

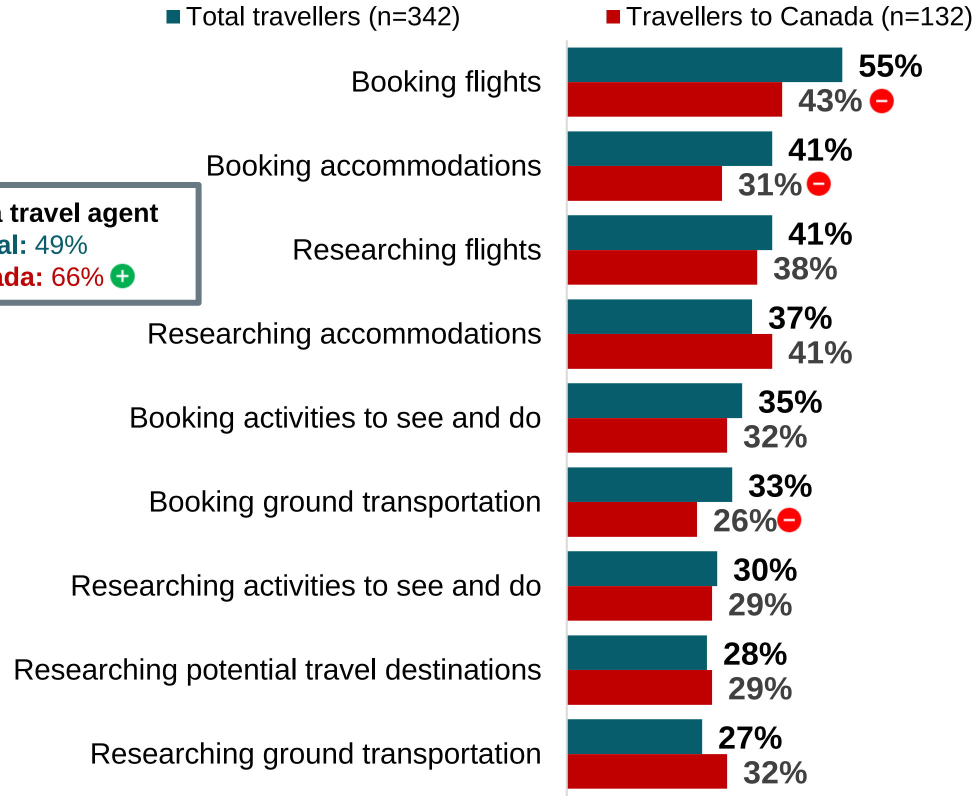
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

% Used a travel agent
Total: 49%
HVG: 58% (+)



Total Travellers to Any Destination vs. Total Travellers to Canada

% Used a travel agent
Total: 49%
Canada: 66% (+)



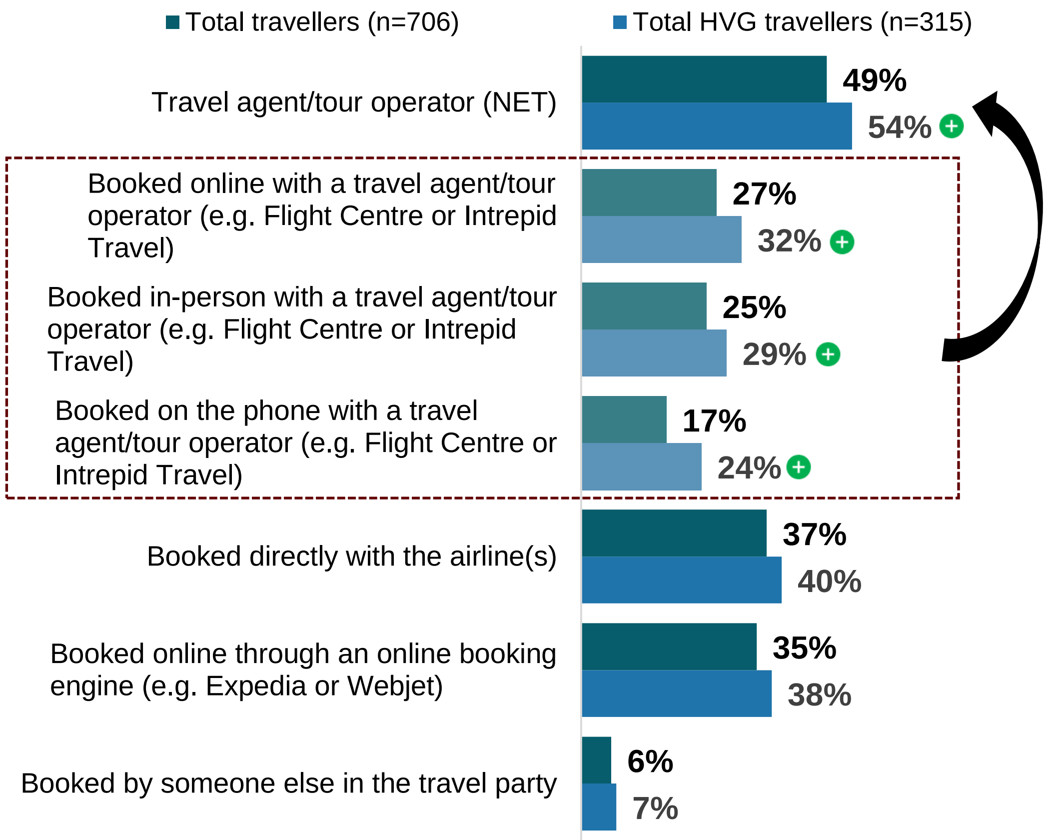
Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=342); HVG (n=184); Travellers to Canada (n=132)
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their 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 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)
F10. Which of the following did a travel agent or tour operator help you with?

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

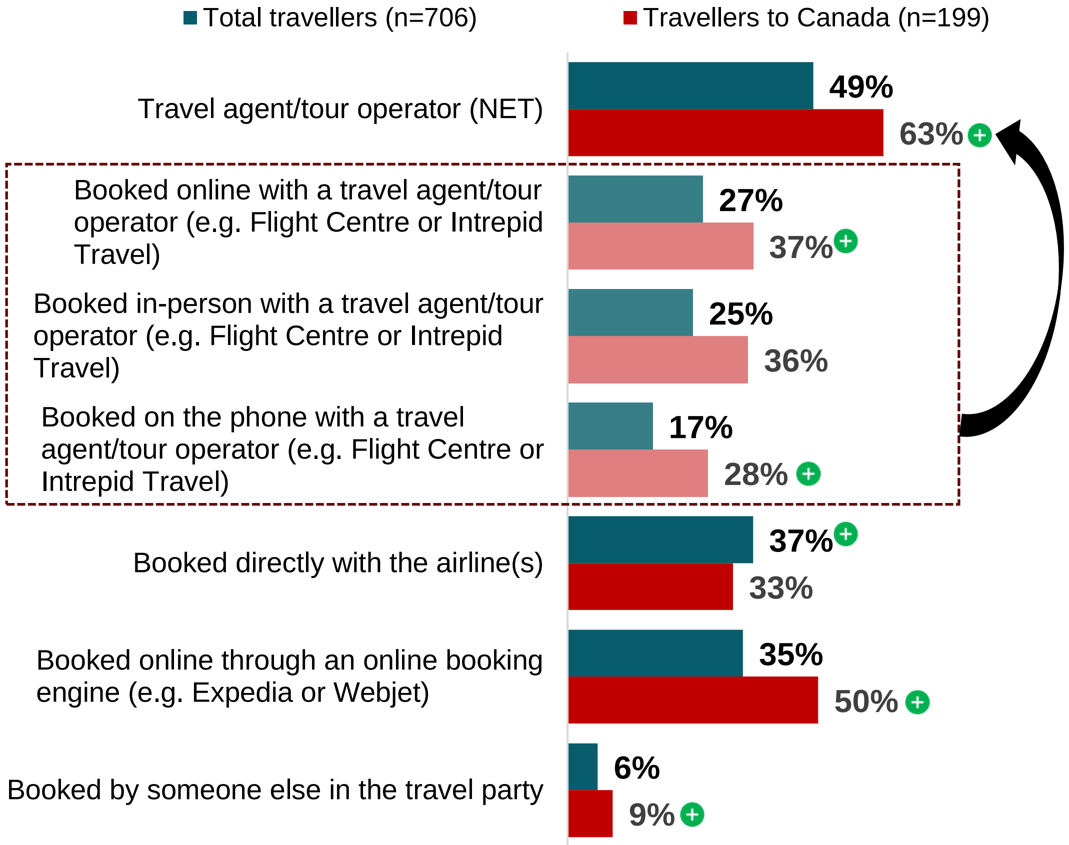
Booking Flights For Recent Trip

Australian travellers, HVGs, and travellers to Canada are most likely to book flights through a travel agent/tour operator. Of note, travellers to Canada also have a high incidence of booking flights through an online booking engine.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



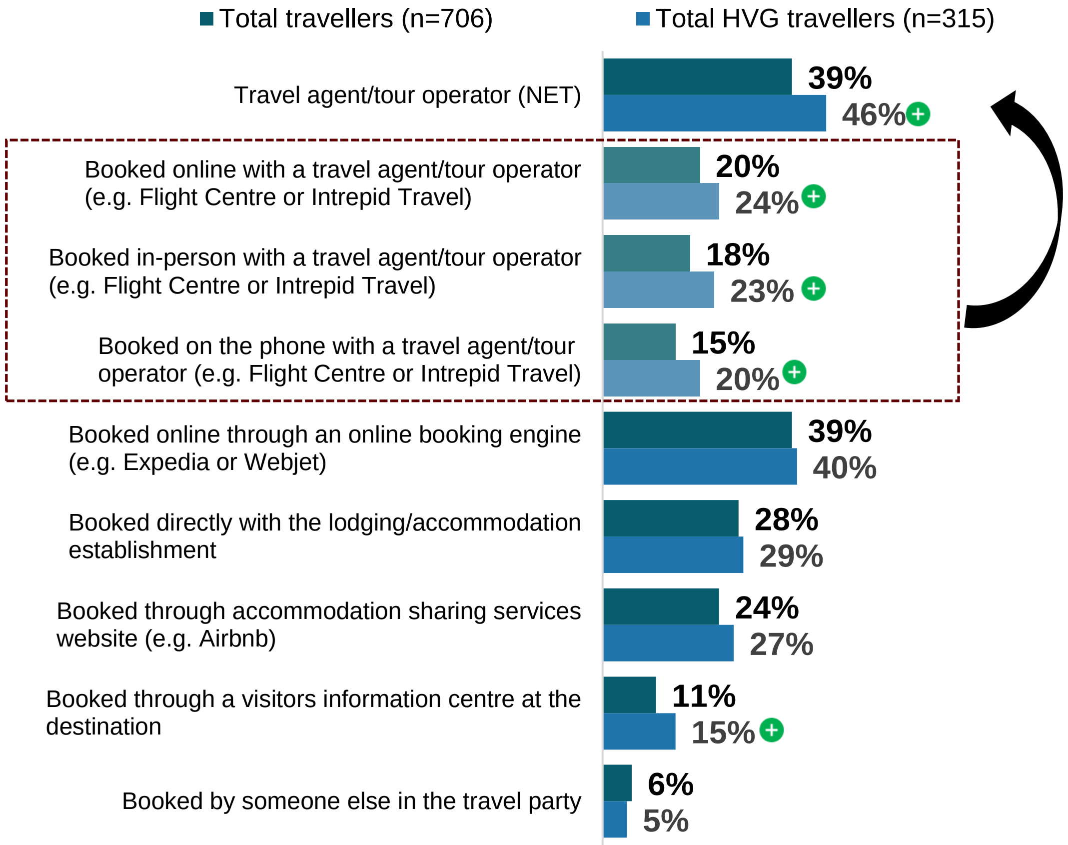
Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination (n=706); HVG (n=315); Travellers to Canada (n=199)
F12. How did you book your flight for this trip? (Select all that apply)

\+ / – = significantly higher/lower result (vs. Total)

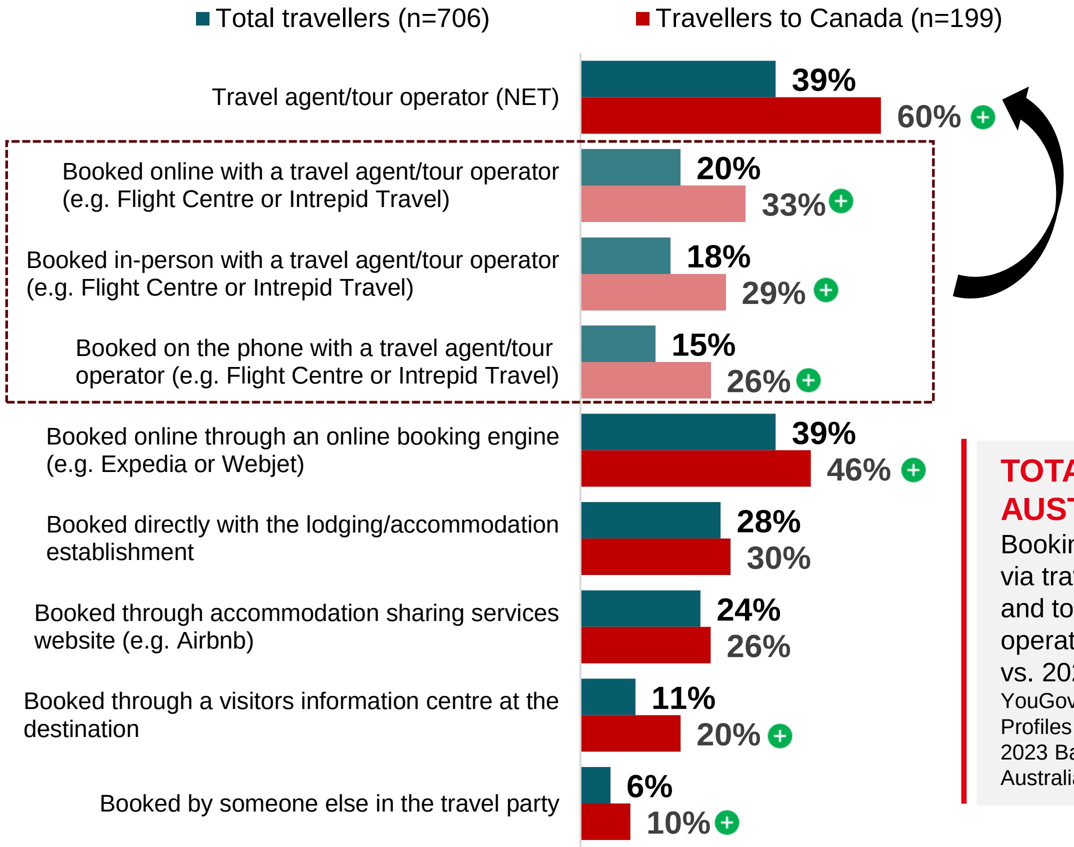
Booking Accommodations For Recent Trip

Australian travellers are most likely to book accommodations through travel agents/tour operators or an online booking engine. The usage of travel agents/tour operators and online booking engines is more prevalent for trips to Canada.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



TOTAL AUSTRALIA
Booking in-person via travel agency and tour operators is down vs. 2022
YouGov Global Travel Profiles (Australia) – 2023 Base: Australians 18+

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination (n=706); HVG (n=315); Travellers to Canada (n=199)
F13. How did you book your accommodation for this trip? (Select all that apply)

+ / – = significantly higher/lower result (vs. Total)

Impact of Extreme Weather Events on Travel Plans

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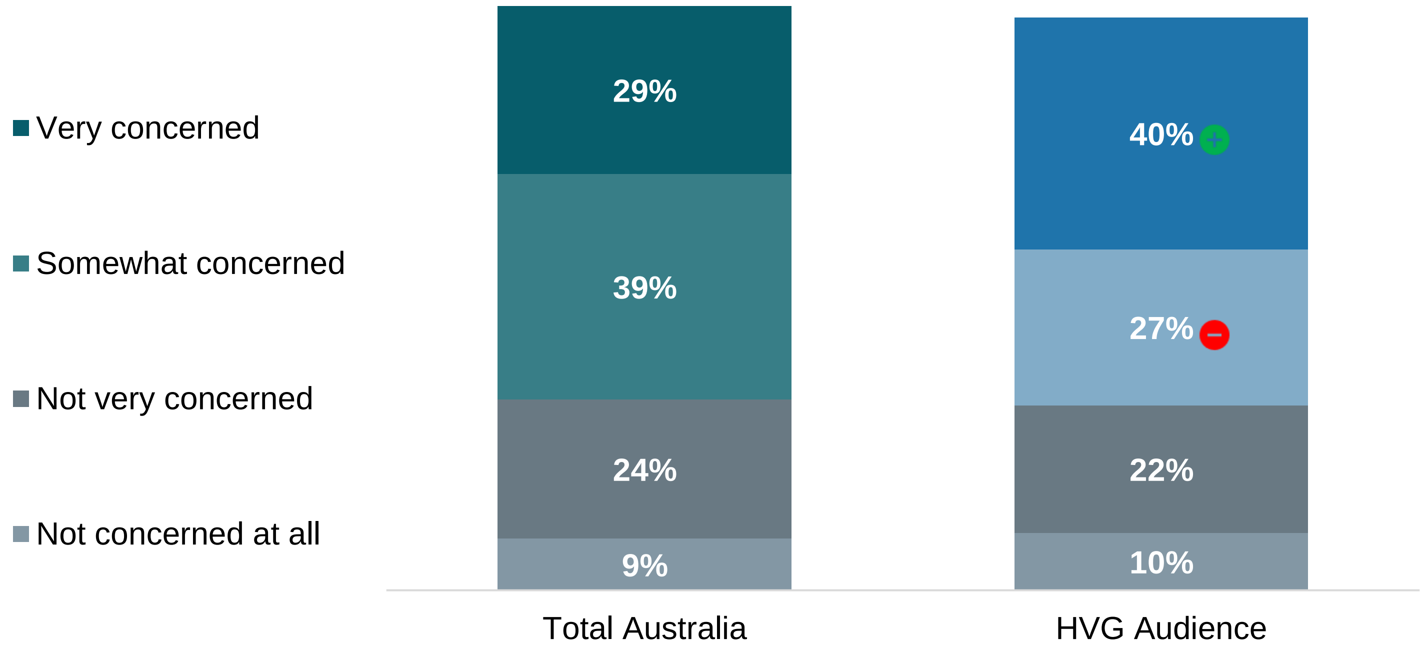
Extreme weather events are a moderate concern to travellers in Australia, with two thirds either somewhat or very concerned. HVGs are more likely to be very concerned about extreme weather events and more likely to have changed plans in the past 3 years due to weather.

% Top 2 box	
67%	68%



	Total Australia	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	24%	37% (+)

Extreme Weather Events Description

As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

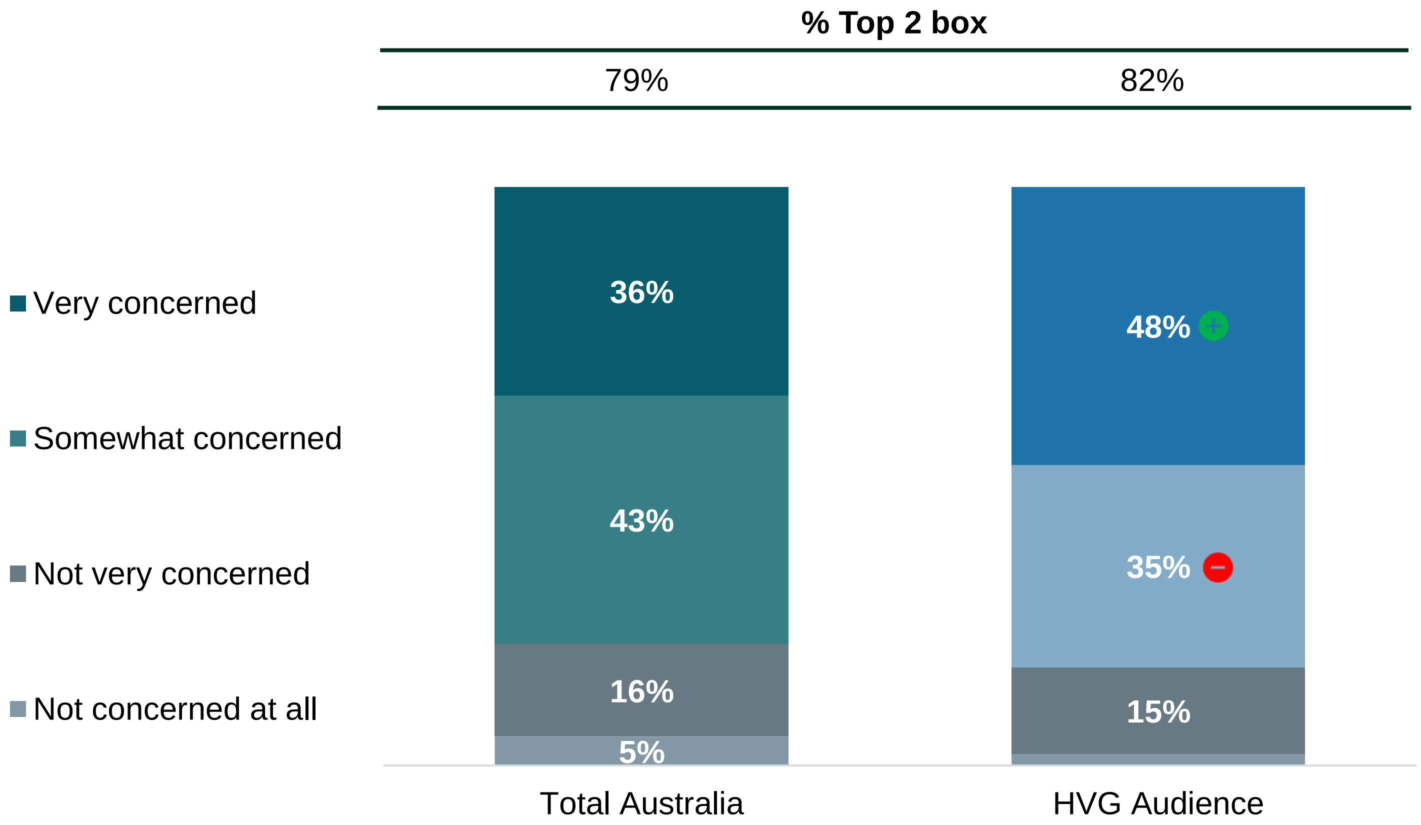
Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=792); HVG (n=217)
D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

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

Impact of International Conflicts & Unrest on Travel Plans

DESTINATION CANADA

Impact of international conflicts on travel are a greater concern for travellers in Australia, with eight in ten either somewhat or very concerned. HVGs are also more likely to be very concerned about the impact of international conflicts and more likely to have changed their plans in the past 3 years due to international conflicts.



	Total Australia	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	22%	32% ⊕

International Conflicts Description

As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=798); HVG (n=214)
D12. [DESCRIPTION] How concerned are you about international conflicts or unrest affecting your travel plans?
D13. In the past 3 years, have you ever had to change plans or cancel a trip due to international conflicts or unrest?

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

Top 10 General Activities Interested In

Trying local food and drinks, nature activities, markets, and historical or art sites are the top interests for Australian travellers while on holiday. Despite having a lower overall level of interest in activities, HVGs share similar activity preferences with total travellers.

Top 10 General Activities Interested In	
Total Australia (n=1590)	**HVG Audience** (n=431)
Trying local food and drink	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) ⊖
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Trying local food and drink ⊖
Nature walks	Nature walks ⊖
Local markets (e.g. public markets, farmers market, night markets)	Local markets (e.g. public markets, farmers market, night markets) ⊖
Oceanside beaches	Oceanside beaches ⊖
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites ⊖
Viewing wildlife or marine life	Nature parks ⊖
Nature parks	Art galleries or museums ⊖
Art galleries or museums	Food and drink festivals or events ⊖
Food and drink festivals or events	Viewing wildlife or marine life ⊖

TOTAL AUSTRALIA

Most Australians will often already have a destination in mind for their next vacation.

YouGov Global Travel Profiles (Australia) – 2023 Base: Australians 18+

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

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

Canada vs. Competitive Destinations

Past Visitation

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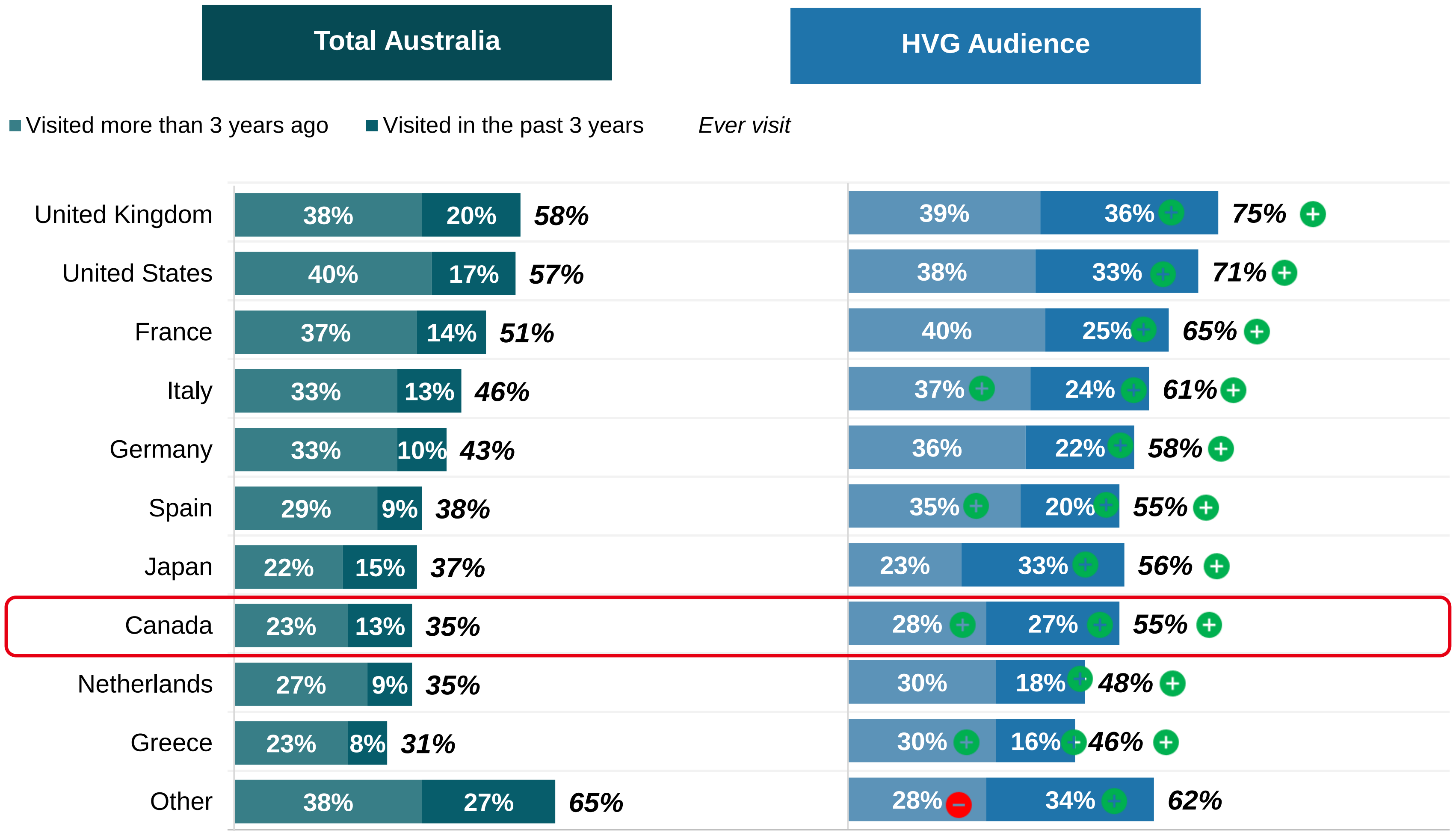
Canada ranks 8th in terms of competitive destinations ever visited by Australian travellers and ranks 7th among the HVG audience (tied with Spain), while neighbouring US ranks 2nd. Destinations in Europe are the most visited and HVGs are much more likely to have ever visited destinations in the competitive set.



Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of Australia, New Zealand and the Pacific Islands** which was 4 or more nights long?

+ / – = significantly higher/lower result (vs. Total)

Number of Visits Ever & Time of Year Visited Canada

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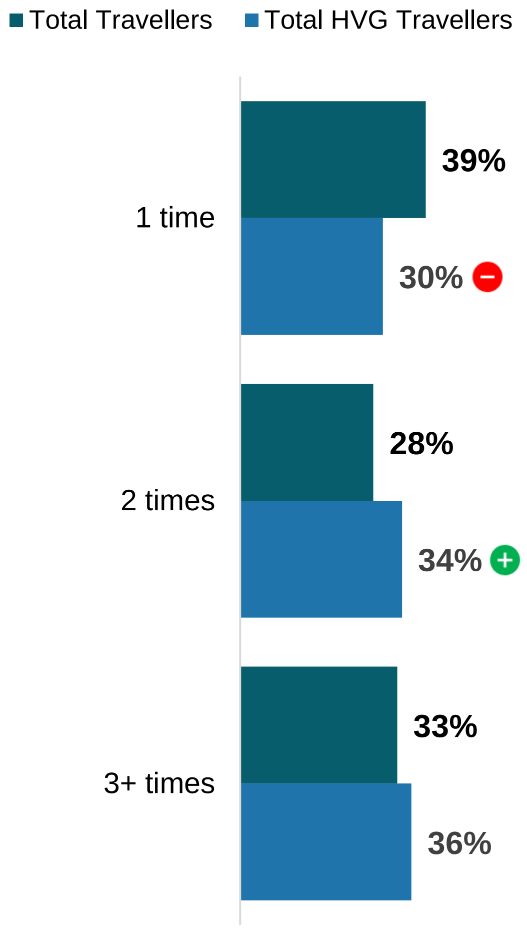
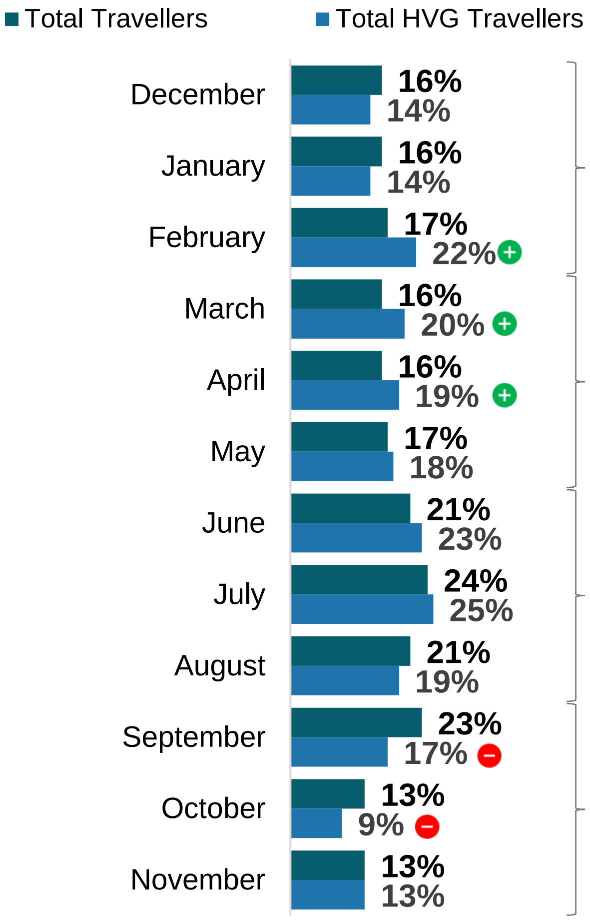
More than half of long-haul travellers who have ever visited Canada have been 2 or more times. Travellers were most likely to visit in the Summer, while visitation in Fall, Winter or Spring are similar. HVGs are less likely than total Australian travellers to have visited Canada in Fall.





	Total Travellers	Total HVG Travellers
Winter	34%	35%
Spring	34%	43% (+)
Summer	48%	52%
Fall	35%	27% (−)

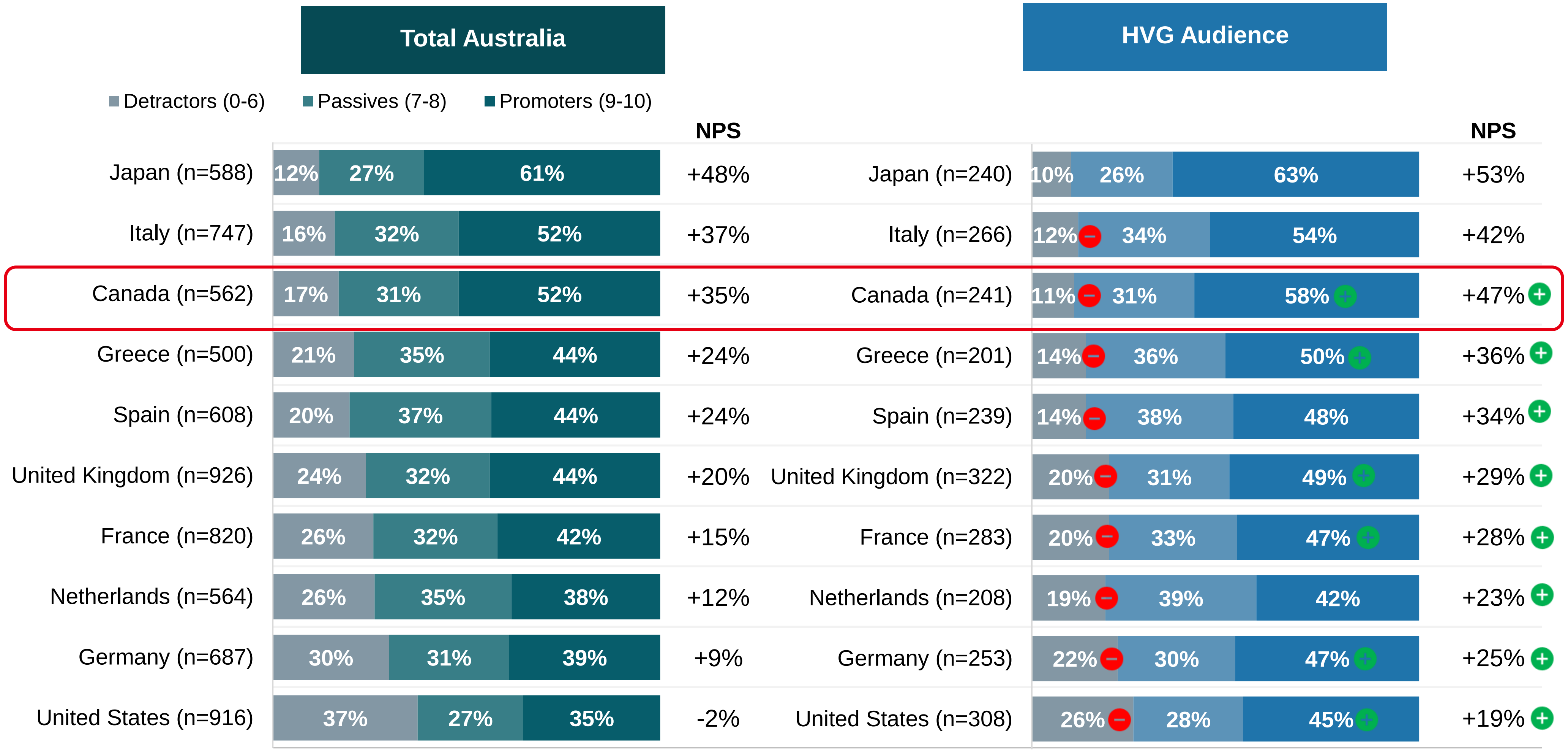
Base: Long-haul holiday travellers (past 3 years or next 2 years)
F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=478); HVG (n=206)
F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=562); HVG (n=241)

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

Net Promoter Score (NPS)

DESTINATION CANADA

Among those who have ever visited each destination, Canada ranks third on NPS among total Australian travellers and second among the HVG audience. Despite being the 2nd most visited, the US ranks last on the list.

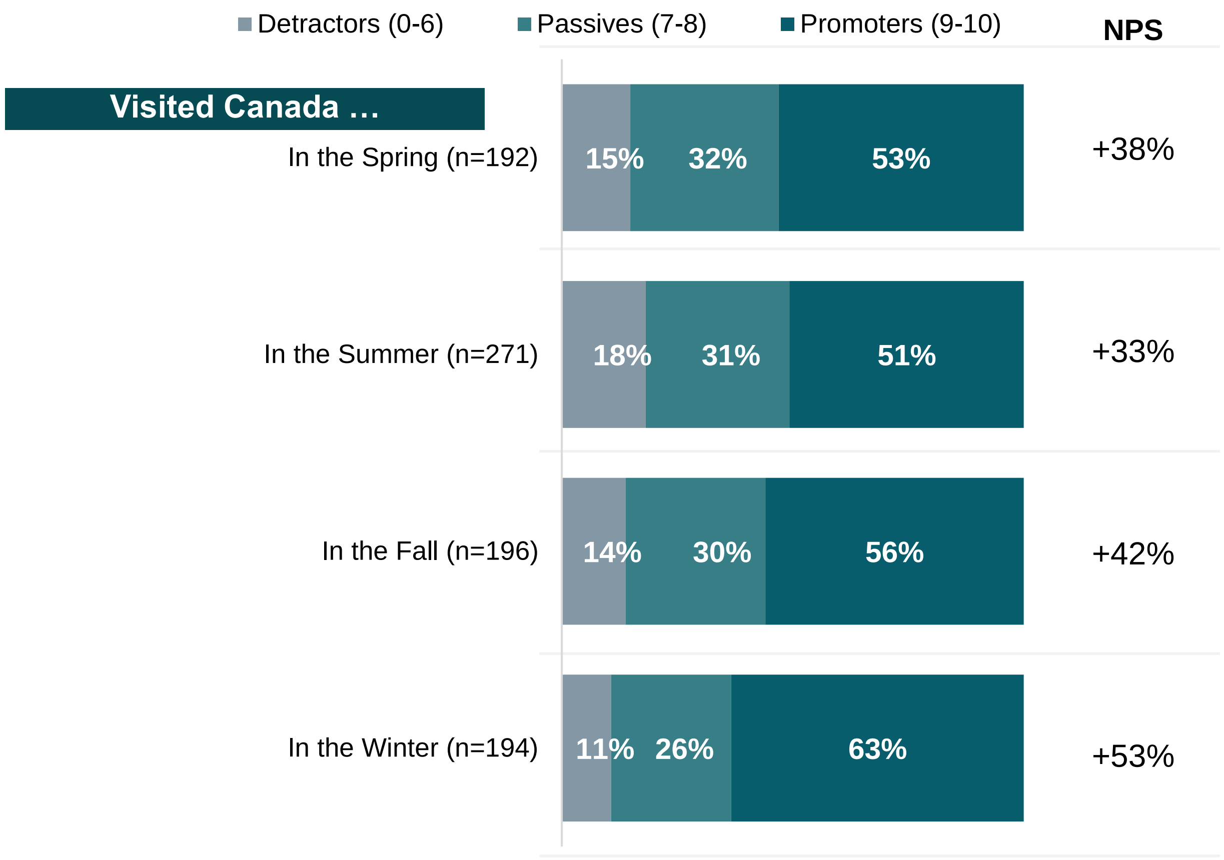


Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Visited [DESTINATION]
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

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

Canada Net Promoter Score (NPS) by Season

Canada's NPS is highest among those who visited in the Winter, followed by Fall.



Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Visited Canada
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
F20. What time of year have you ever visited Canada? Select all that apply.

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

Performance Scorecard for Canada

DESTINATION CANADA

Canada performed well in Australia in 2023, ranking 1st (out of 8 destinations) for total impressions and 2nd for positive buzz. Canada also ranked 3rd for three additional metrics. However, despite the high rankings, scores for Canada are down year-over-year in three metrics

Total Impression	Consideration	Positive Recommend	Destination Health Index
43% ▼	17%	27% ▼	28% ▼
Ranks 1st *(out of 8)*	Ranks 4th *(out of 8)*	Ranks 3rd *(out of 8)*	Ranks 3rd *(out of 8)*
	(Behind: JP, UK, IT)	(Behind: JP, IT)	(Behind: JP, IT)

Positive Reputation	Positive Buzz	Ad Awareness	Word of Mouth
40%	14%	7%	11%
Ranks 3rd *(out of 8)*	Ranks 2nd *(out of 8)*	Ranks 4th *(out of 8)*	Ranks 5th *(out of 8)*
(Behind: JP, IT)	(Behind: JP)	(Behind: JP, UK, US)	(Behind: JP, UK, US, IT)

TOTAL Australia
Competitive set: Japan, UK, Italy, France, US, Spain, Germany

YouGov DestinationIndex (Australia) – 2023

Base: Australians 18+ (n=28,817)

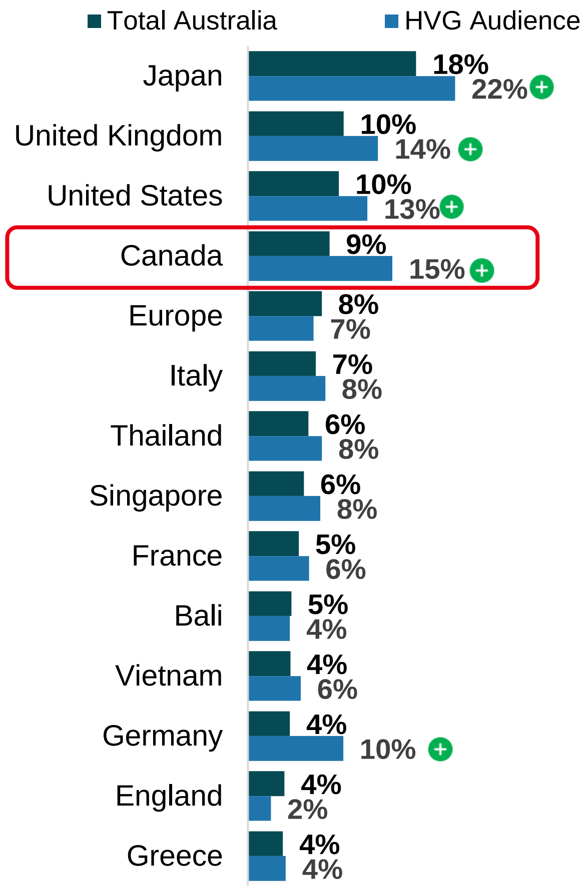
▲ / ▼ = significantly higher/lower result (vs. 2022)

Unaided Long-Haul Destination Consideration (Next 2 Years)

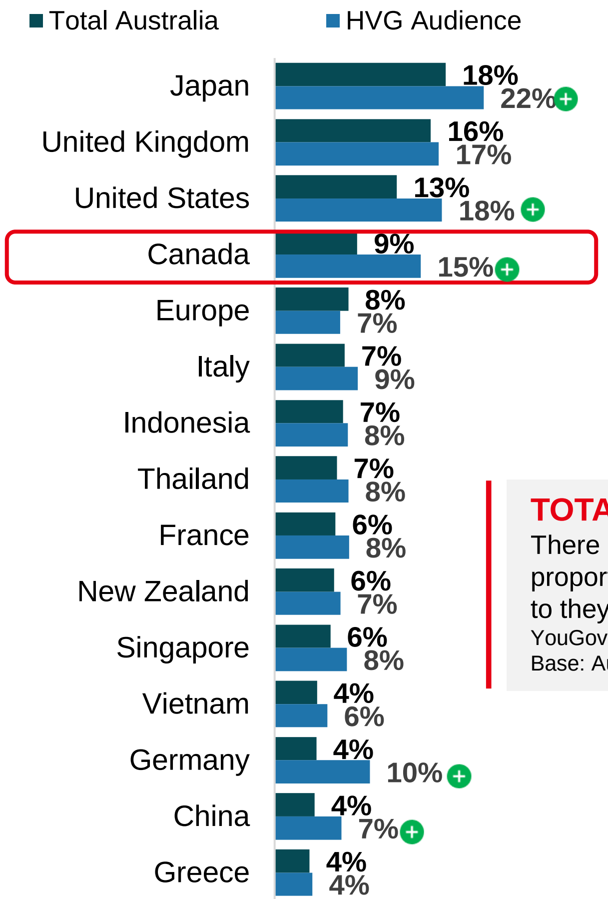
DESTINATION CANADA

Canada ranks 4th for destinations being considered by Australian travellers and amongst the HVG audience, behind Japan, the UK and the US. HVGs are more likely to consider Canada, but also Japan and the US. Of note, mentions of UK and US are supported by mentions of specific regions and states with strong identities.

Top Destination Brands[1]



Top Destinations[2]



TOTAL AUSTRALIA

There is significant decrease in the proportion saying they usually go back to they same places on vacation.

YouGov Global Travel Profiles (Australia) – 2023
Base: Australians 18+

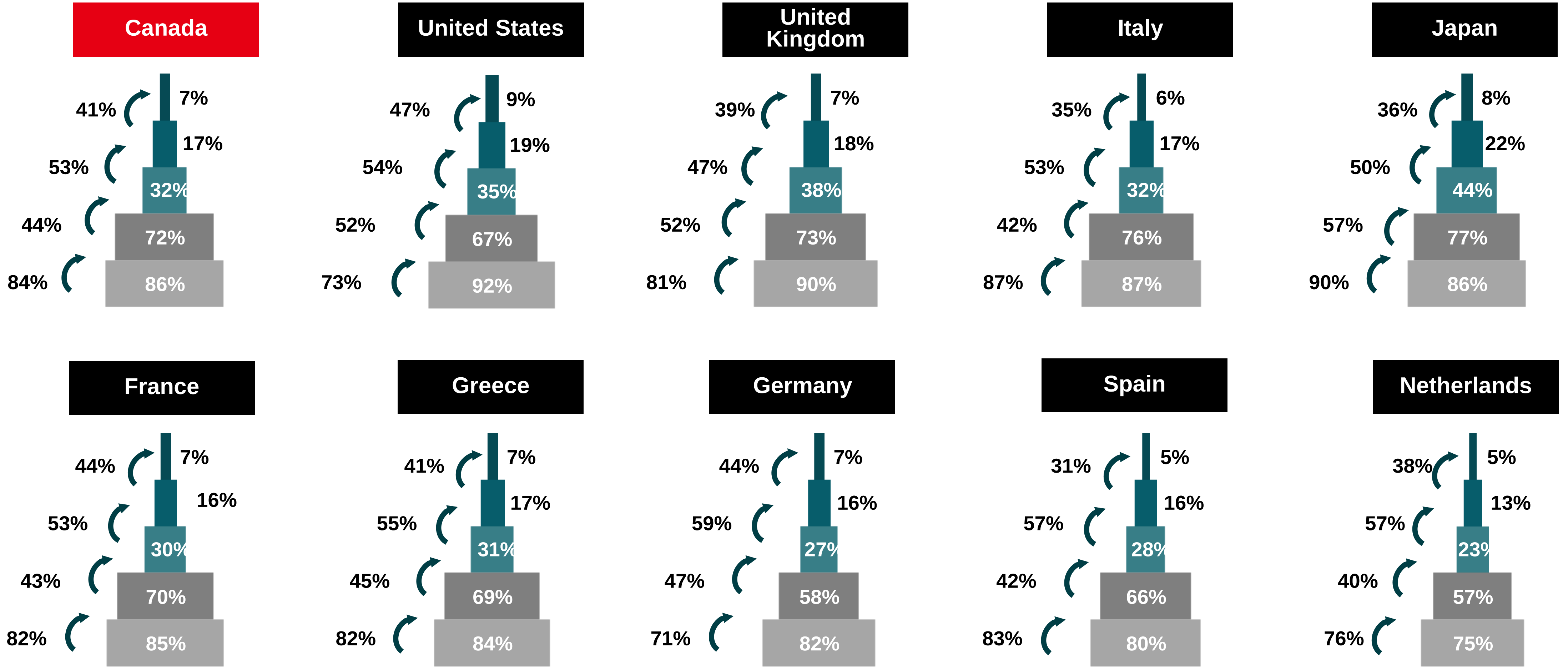
[1] Responses as mentioned by respondents (e.g., percentage who said “Canada” specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
B1. You mentioned that you are likely to take a 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 (vs. Total)

Consideration Funnels: Total Australia Travellers

Majority of Australian travellers are familiar with Canada as a travel destination, and one third are seriously considering visiting Canada in the next 2 years. Scores are comparable to Italy, but trail behind Japan, the US and the UK.

DESTINATION CANADA

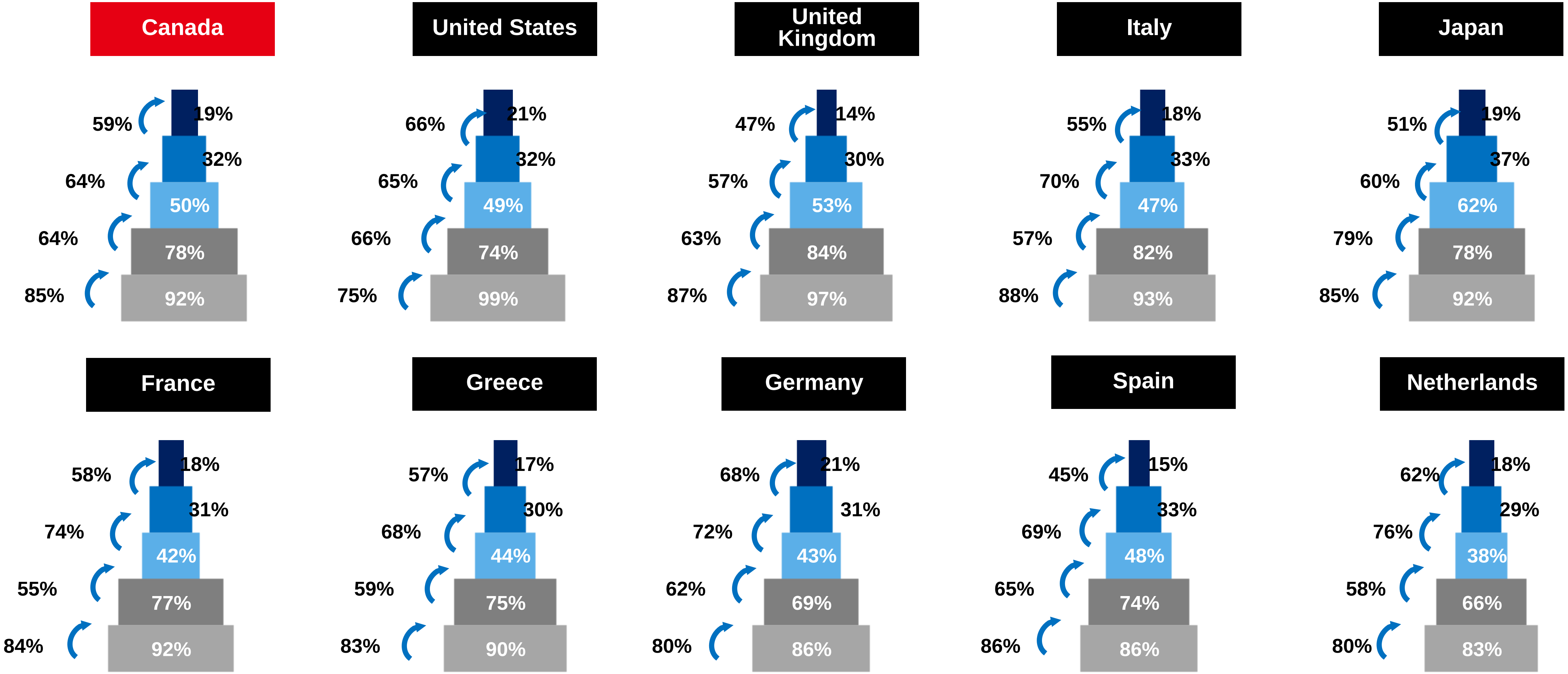


Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
See notes for question wording and funnel definitions

Consideration Funnels: Among HVG Audience

DESTINATION CANADA

Compared to total Australian travellers, Canada has higher consideration rates among HVGs, on par with the US and the UK. Other than the UK, European competitors have the highest conversion rates from consideration to active planning.



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

Destination Consideration By Seasons

DESTINATION CANADA

Canada's consideration is highest in the Summer, followed closely by Fall. Amongst the competitive set, Japan has the highest consideration in the Winter, Germany for Spring and Summer, and the UK for Fall.

Total Australia	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Canada (n=1136)	33%	35%	42%	38%
France (n=379)	25%	41%	44%	38%
Germany (n=309)	29%	45%	48%	38%
Greece (n=374)	27%	39%	42%	36%
Italy (n=406)	25%	38%	43%	39%
Japan (n=392)	37%	42%	38%	35%
Netherlands (n=304)	32%	36%	41%	40%
Spain (n=351)	24%	40%	46%	37%
United Kingdom (n=392)	25%	35%	47%	43%
United States (n=335)	29%	39%	38%	32%

HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Canada (n=333)	36%	34%	41%	36%
France (n=101)	26%	43%	41%	33%
Germany (n=100)	33%	54% (+)	42%	36%
Greece (n=111)	35% (+)	47% (+)	42%	39%
Italy (n=121)	24%	50% (+)	41%	41%
Japan (n=99)	43%	48%	39%	32%
Netherlands (n=84)	36%	46% (+)	39%	41%
Spain (n=111)	26%	41%	42%	32%
United Kingdom (n=130)	27%	33%	37% (−)	42%
United States (n=118)	30%	49% (+)	45% (+)	32%

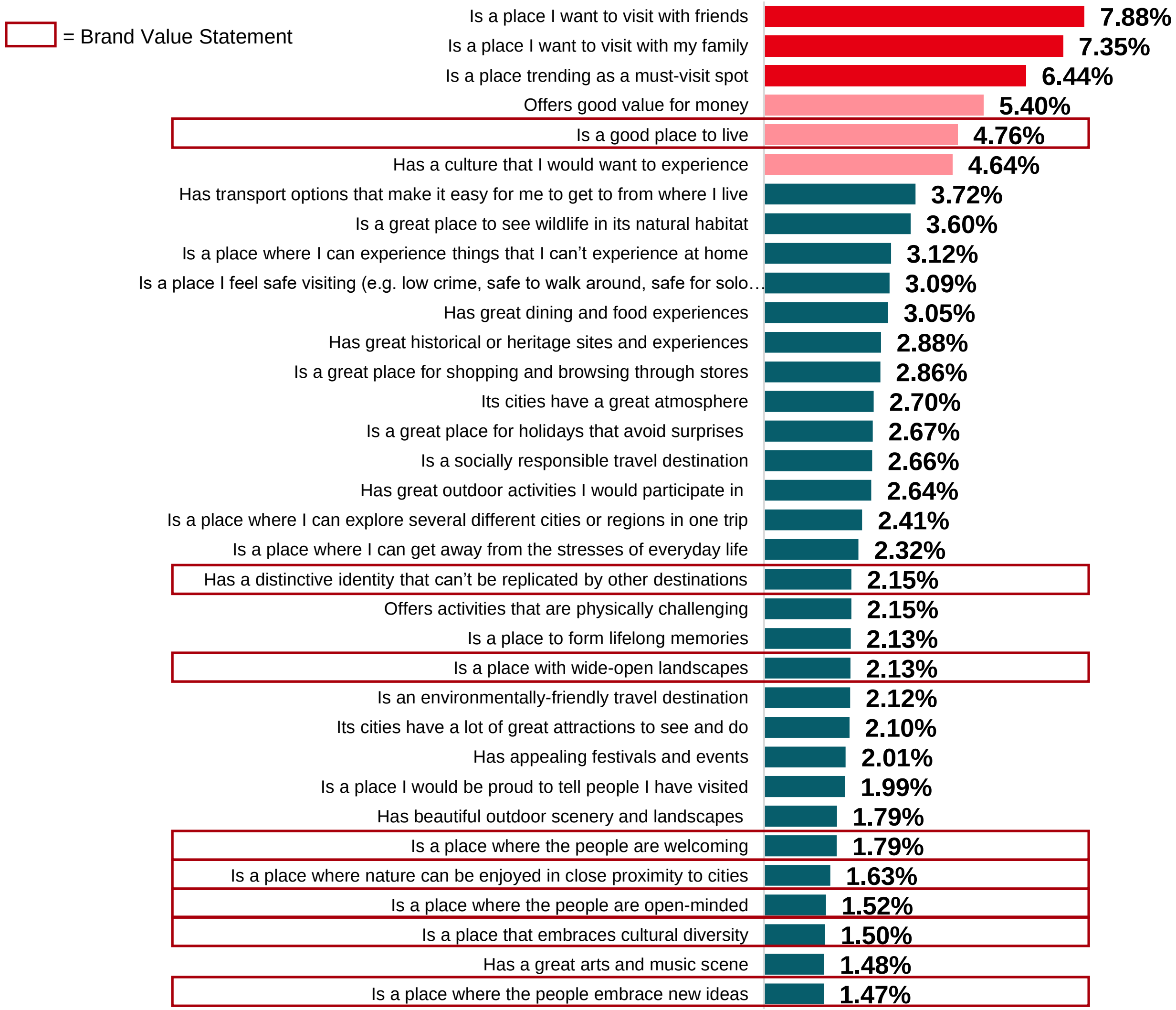
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Those in the dream to purchase stages of the path to purchase for [DESTINATON]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

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

Destination Attributes: Drivers Analysis

DESTINATION CANADA

The most influential aspects of consideration are being a place to visit with friends/family and trending as a must-visit spot. Secondary drivers include offering good value for money, being a good place to live, and having a culture I want to experience.



<u>Description</u>

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

<u>Interpretation</u>

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

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years)
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: Among Total Australia

Canada stands out as being environmentally-friendly, offering physically challenging and great outdoor activities, and being a great place to see wildlife. There are several dimensions that represent white space as no one destination dominates them. Of note, despite having the most strengths compared to the competitive set, Canada also has the most weaknesses.

		Canada	France	Germany	Greece	Italy	Japan	Netherlands	Spain	United Kingdom	United States
	n=	1590	536	536	535	536	512	535	535	537	508
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life										
	Is a place to form lifelong memories										
	Is a place I would be proud to tell people I have visited										
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)						Strength				Weakness
	Is a place where I can explore several different cities or regions in one trip	Weakness									
	Offers good value for money				Strength						
	Has transport options that make it easy for me to get to from where I live										
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										
	Is a place where I can experience things that I can't experience at home										
	Is an environmentally-friendly travel destination	Strength						Strength			
	Is a socially responsible travel destination										
	Is a place trending as a must-visit spot				Strength		Strength				
To-Do	Offers activities that are physically challenging	Strength									Strength
	Is a great place for shopping and browsing through stores	Weakness	Strength		Weakness						Strength
	Its cities have a lot of great attractions to see and do	Weakness									
	Has great outdoor activities I would participate in	Strength									
	Has great dining and food experiences	Weakness	Strength			Strength					
	Has a great arts and music scene	Weakness	Strength				Weakness			Strength	
	Has appealing festivals and events	Weakness									
To-See	Its cities have a great atmosphere	Weakness									
	Has beautiful outdoor scenery and landscapes										
	Is a great place to see wildlife in its natural habitat	Strength	Weakness			Weakness					Strength
	Has great historical or heritage sites and experiences	Weakness	Strength								Weakness
	Has a culture that I would want to experience	Weakness				Strength				Weakness	Weakness

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), 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: Among Total Australia

Among the brand value statements, Canada dominates on almost all statements, including: being a place with wide-open landscapes, allows one to enjoy nature close to cities, embraces cultural diversity, people are welcoming, open-minded and is a good place to live. Of note, Canada has a weakness in having a 'distinctive identity'.

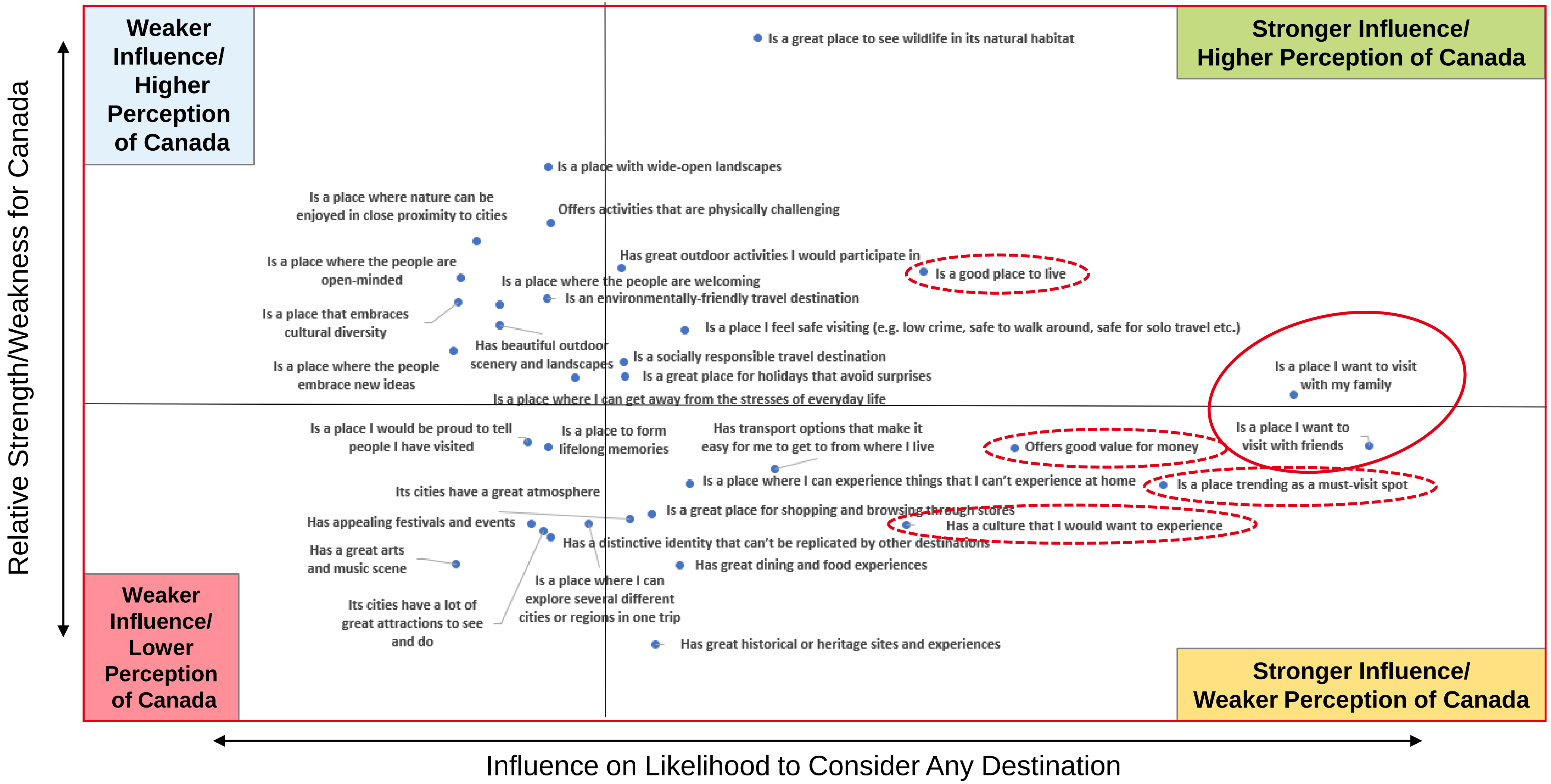
	Canada	France	Germany	Greece	Italy	Japan	Netherlands	Spain	United Kingdom	United States
n=	1590	536	536	535	536	512	535	535	537	508
Is a place with wide-open landscapes	Strength					Weakness				Strength
Is a place where nature can be enjoyed in close proximity to cities	Strength									
Is a place that embraces cultural diversity	Strength					Weakness				
Is a place where the people are welcoming	Strength	Weakness								
Is a place where the people are open-minded	Strength					Weakness	Strength			
Is a place where the people embrace new ideas							Strength			
Is a good place to live	Strength									
Has a distinctive identity that can't be replicated by other destinations	Weakness					Strength				Weakness

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

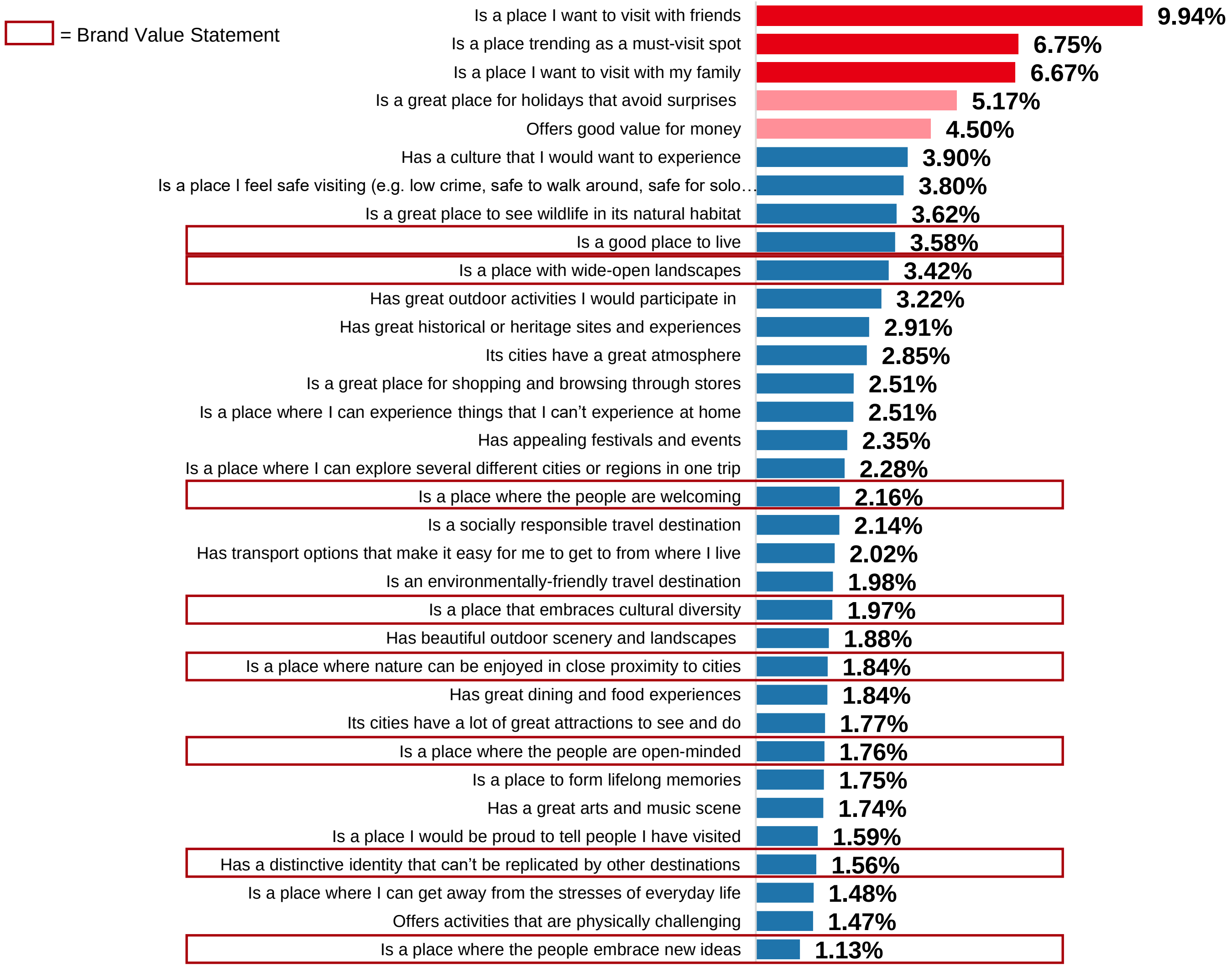
Canada Strengths & Opportunities: Total Australia

There is opportunity to boost perceptions on the top drivers of consideration such as being a place I want to visit with my friends/family, which no destination dominates. Efforts to improve perceptions of being a must-visit spot, a good place to live, offering good value for money and an experiential culture could also help drive destination consideration.



Destination Attributes: Drivers Analysis: Among HVG Audience

Similar to total Australian travellers, the top drivers among HVGs are: being a place I want to visit with family/friends and trending as a must-visit spot. Secondary drivers include being a great place for holidays that avoid surprises and offering good value for money.



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 holiday travellers, HVG audience, (past 3 years or next 2 years)
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 : Among HVG Audience

Among HVGs, Canada stands out as being environmentally-friendly, offering physically challenging and great outdoor activities, and being a great place to see wildlife. There are also several dimensions that represent white space as no destination dominates them. Similar to total travellers, Canada has the most strengths as well as the most weaknesses compared to the competitive set.

DESTINATION CANADA

		Canada	France	Germany	Greece	Italy	Japan	Netherlands	Spain	United Kingdom	United States
	n=	431	130	147	149	146	127	128	151	155	160
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life										
	Is a place to form lifelong memories										
	Is a place I would be proud to tell people I have visited										
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)										Weakness
	Is a place where I can explore several different cities or regions in one trip										
	Offers good value for money				Strength						Strength
	Has transport options that make it easy for me to get to from where I live										
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									Strength	
	Is a place where I can experience things that I can't experience at home										
	Is an environmentally-friendly travel destination	Strength				Weakness	Strength				
	Is a socially responsible travel destination							Strength			
	Is a place trending as a must-visit spot				Strength		Strength				
To-Do	Offers activities that are physically challenging	Strength									
	Is a great place for shopping and browsing through stores				Weakness			Weakness		Strength	Strength
	Its cities have a lot of great attractions to see and do	Weakness									
	Has great outdoor activities I would participate in	Strength									
	Has great dining and food experiences	Weakness	Strength			Strength					
	Has a great arts and music scene	Weakness	Strength				Weakness				
	Has appealing festivals and events								Strength		
To-See	Its cities have a great atmosphere	Weakness									
	Has beautiful outdoor scenery and landscapes										
	Is a great place to see wildlife in its natural habitat	Strength					Weakness				
	Has great historical or heritage sites and experiences	Weakness									
	Has a culture that I would want to experience					Strength				Weakness	Weakness

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), HVG Audience, 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: Among HVG Audience

DESTINATION CANADA

Among HVGs, Canada stands out as being a place with wide-open landscapes, where nature can be enjoyed in close proximity to cities, and where people are welcoming. Like total Australian travellers, Canada has a weakness in having a 'distinctive identity'.

	Canada	France	Germany	Greece	Italy	Japan	Netherlands	Spain	United Kingdom	United States
n=	431	130	147	149	146	127	128	151	155	160
Is a place with wide-open landscapes										
Is a place where nature can be enjoyed in close proximity to cities										
Is a place that embraces cultural diversity										
Is a place where the people are welcoming										
Is a place where the people are open-minded										
Is a place where the people embrace new ideas										
Is a good place to live										
Has a distinctive identity that can't be replicated by other destinations										

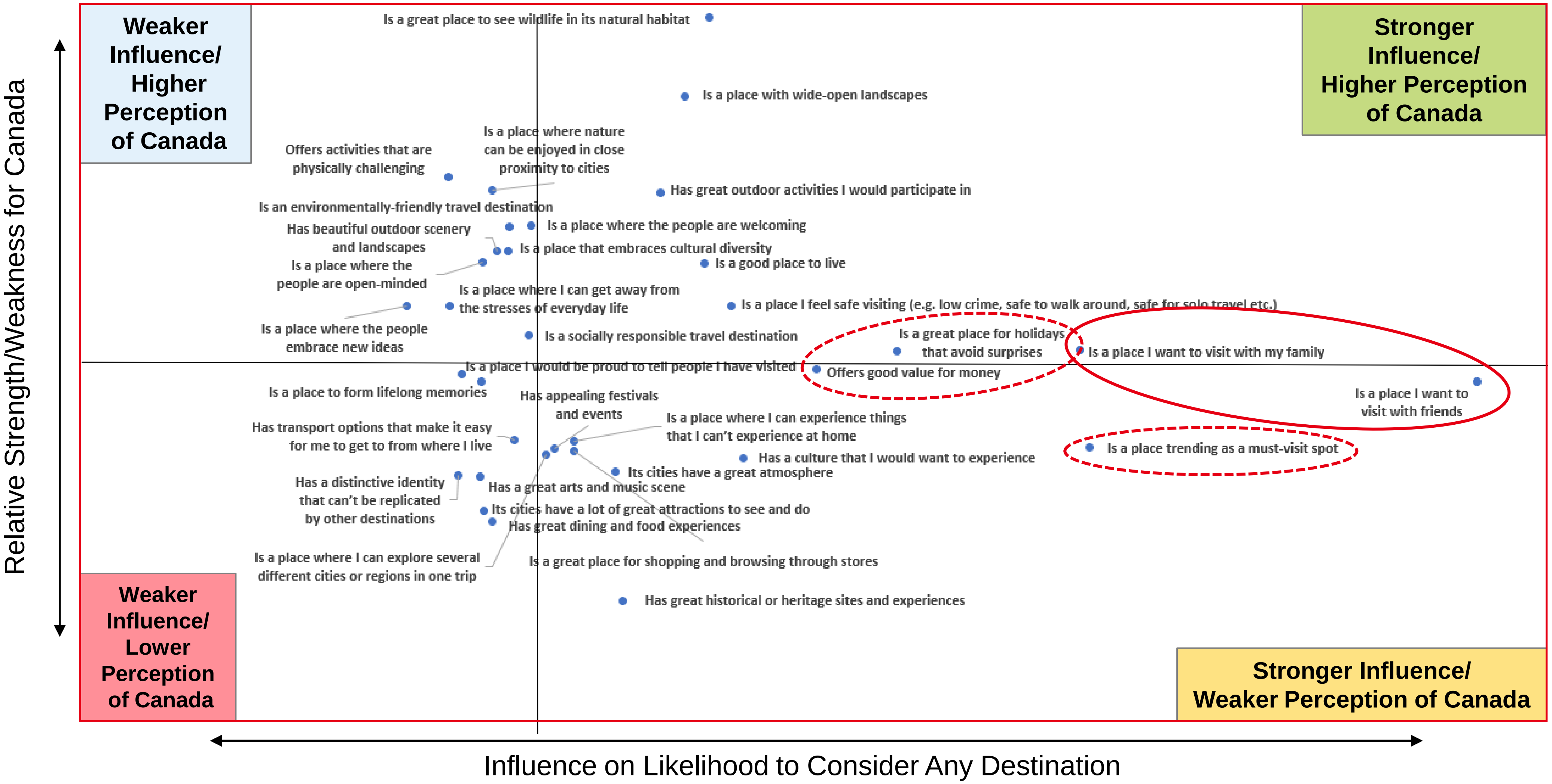
Strength | Weakness

Australia GTRP – December 2023

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Canada Strengths & Opportunities: Among HVG Audience

Being a place I want to visit with friends and family presents the greatest opportunities among HVGs. Improving perceptions of being a must-visit spot, a good place to live, great place for holidays that avoid surprises could also help drive consideration.



Increasing Fall/Winter Visitation

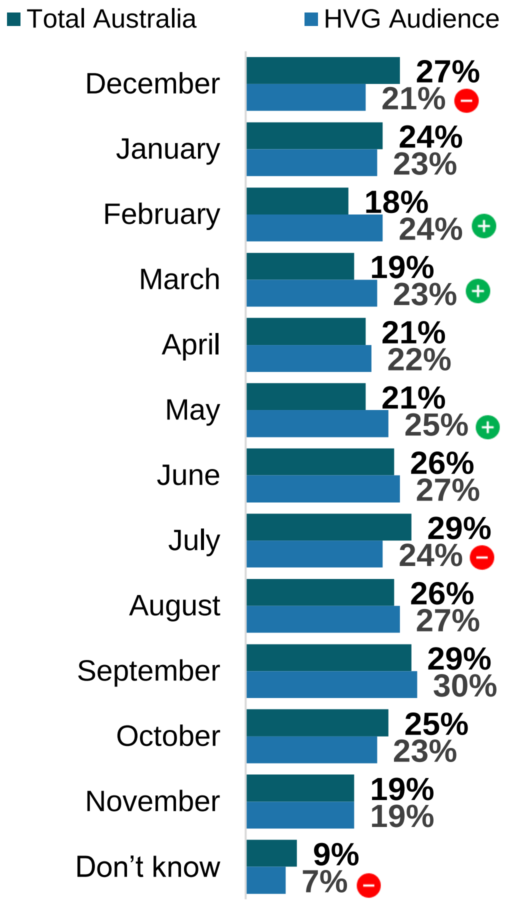
Aurora Borealis, YellowKnife

Northwest Territories

Demand by Season (Any Destination)

DESTINATION CANADA

Travel demand is highest in the Summer and Fall (~4.8M each) among total Australian travellers. HVGs are more likely to travel in the Spring than Fall. Almost 4.5M Australians typically travel during the Winter months.



			POTENTIAL MARKET SIZE*	
	Total Australia	HVG Audience	Total Australia	HVG Audience
Winter	43%	43%	4,457,500	1,215,000
Spring	39%	48% (+)	4,063,500	1,332,500
Summer	47%	50%	4,841,000	1,391,000
Fall	46%	45%	4,779,000	1,265,000

** Calculation: Total potential long-haul holiday travellers aged 18 years or more (10,366,500) x total in Australia typically travel during season*

** Calculation: Total potential HVG travellers (2,799,000) x total in Australia typically travel during season*

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

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

Top of Mind Fall/Winter Destinations

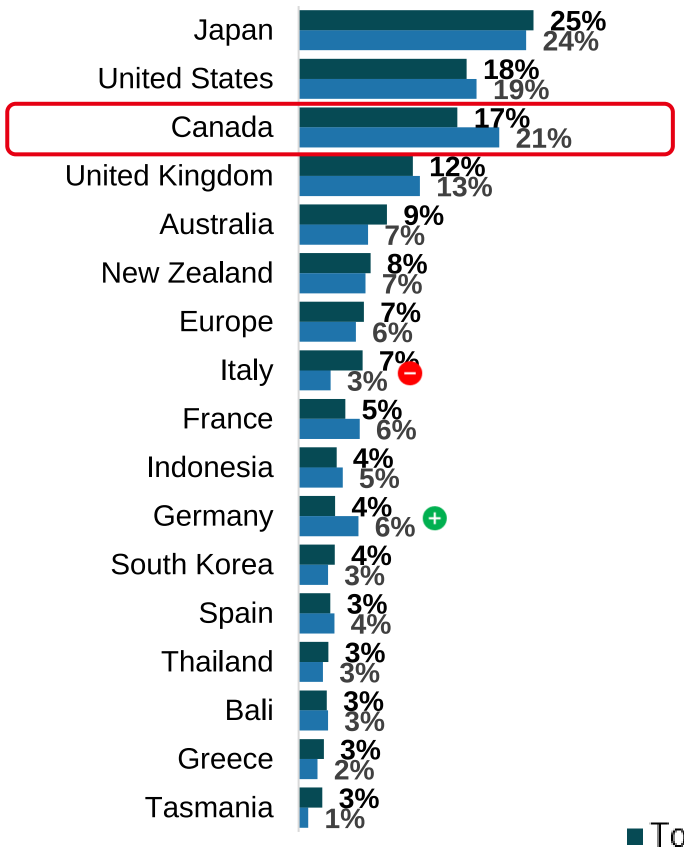
Canada is the top destination Australian travellers think about to experience the Winter season and ranks 3rd for Fall trips. Canada increases to 2nd for Fall trips among the HVG audience.

Fall

Winter

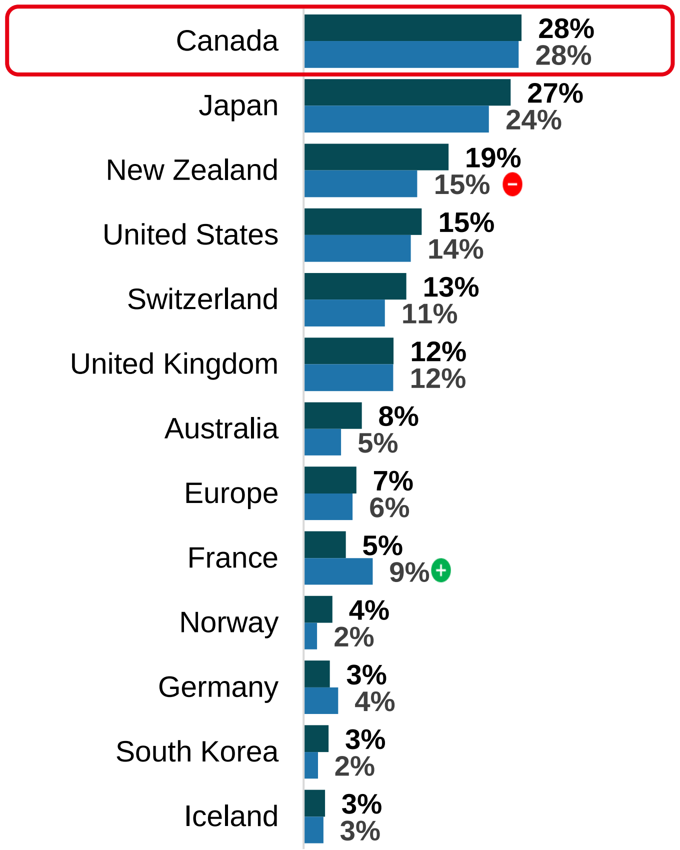
Autumn Season Description

Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn.



Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.



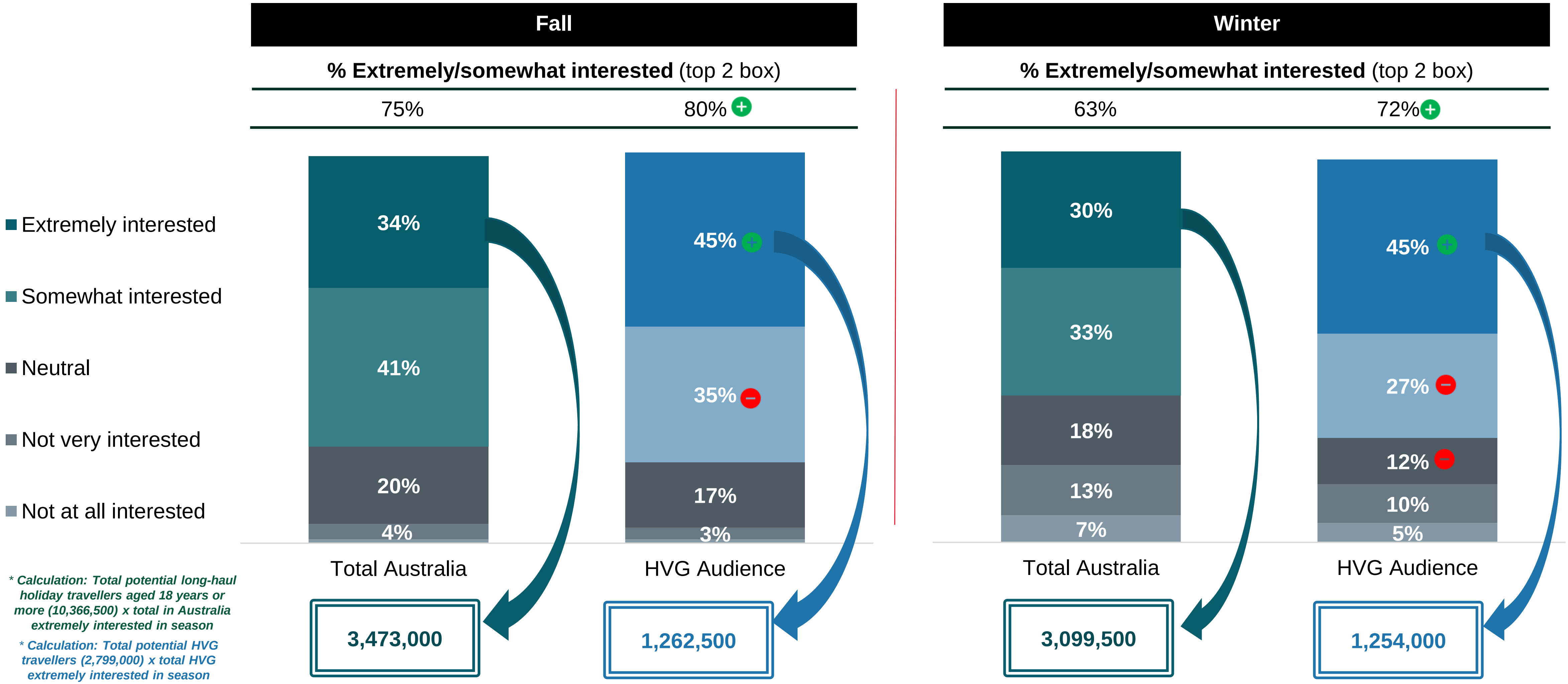
■ Total Australia ■ HVG Audience

Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
Base: Long-haul holiday 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 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. (n=779); HVG (n=212)
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 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. (n=811); HVG (n=219)

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

Interest in Fall/Winter Holidays

At least 3M Australian travellers are interested in taking a trip during a destination's Fall and Winter season, with HVGs expressing even greater interest.



Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
Base: Long-haul holiday travellers (past 3 years or next 2 years)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=779); HVG (n=212)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=811); HVG (n=219)

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

Potential Market Size For Canada in Fall/Winter

DESTINATION CANADA

There is potential to convert over 2 million Australian travellers to Canada in the Fall (2.8M) and Winter (2.4M) seasons in the next 2 years.

Total potential travellers aged 18 years or more		**Target Market for Canada** Those in the dream to purchase stages of the path to purchase for Canada		Size of the target market		**Consideration for Canada in [SEASON] in N2Y**		Immediate potential for Canada in N2Y
Long haul pleasure travellers **10,366,500**	x	**71.5%**	=	**7,412,000**	x	**Fall: 37.5%** **Winter: 32.9%**	=	**Fall: 2,779,500** **Winter: 2,438,500**
HVG travellers **2,799,000**	x	**77.5%**	=	**2,169,000**	x	**Fall: 36.2%** **Winter: 35.7%**	=	**Fall: 785,000** **Winter: 774,500**

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) Total (n=1590); HVG (n=431)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1136); HVG (n=333)

Fall/Winter Conversion – Total Australia

DESTINATION CANADA

There is similar conversion between those who typically travel during the Fall and Winter months and interest in taking a trip during a destination's Fall and Winter season. Canada has strong potential to convert those who are extremely interested in travel during the Fall and Winter seasons.

Fall

Demand During Fall Months (any destination)

4,779,000

73%

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

3,473,000

80%

Next 2 Year Immediate Potential for CANADA During Fall Season

2,779,500

Winter

Demand During Winter Months (any destination)

4,457,500

69%

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

3,099,500

78%

Next 2 Year Immediate Potential for CANADA During Winter Season

2,438,500

Base: Long-haul holiday 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=1590)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? Total (n=779)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=811)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1136)

Fall/Winter Conversion – Among HVG Audience

DESTINATION CANADA

Among HVGs, interest in taking a trip during a destination's Fall or Winter season is equal or exceeds that of travel during the respective Fall or Winter months. Furthermore, Canada has strong potential to convert those who are extremely interested in travel during the Fall and Winter seasons.

Fall

Demand During Fall Months (any destination): **1,265,000**

↓ **100%**

Extremely Interested in Visiting a Destination During its Fall Season (any destination): **1,262,500**

↓ **62%**

Next 2 Year Immediate Potential for CANADA During Fall Season: **785,000**

Winter

Demand During Winter Months (any destination): **1,215,000**

↓ **103%**

Extremely Interested in Visiting a Destination During its Winter Season (any destination): **1,254,000**

↓ **62%**

Next 2 Year Immediate Potential for CANADA During Winter Season: **774,500**

Base: Long-haul holiday travellers (past 3 years or next 2 years), HVG audience
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply HVG (n=431)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? HVG (n=212
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? HVG (n=219)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? HVG (n=333)

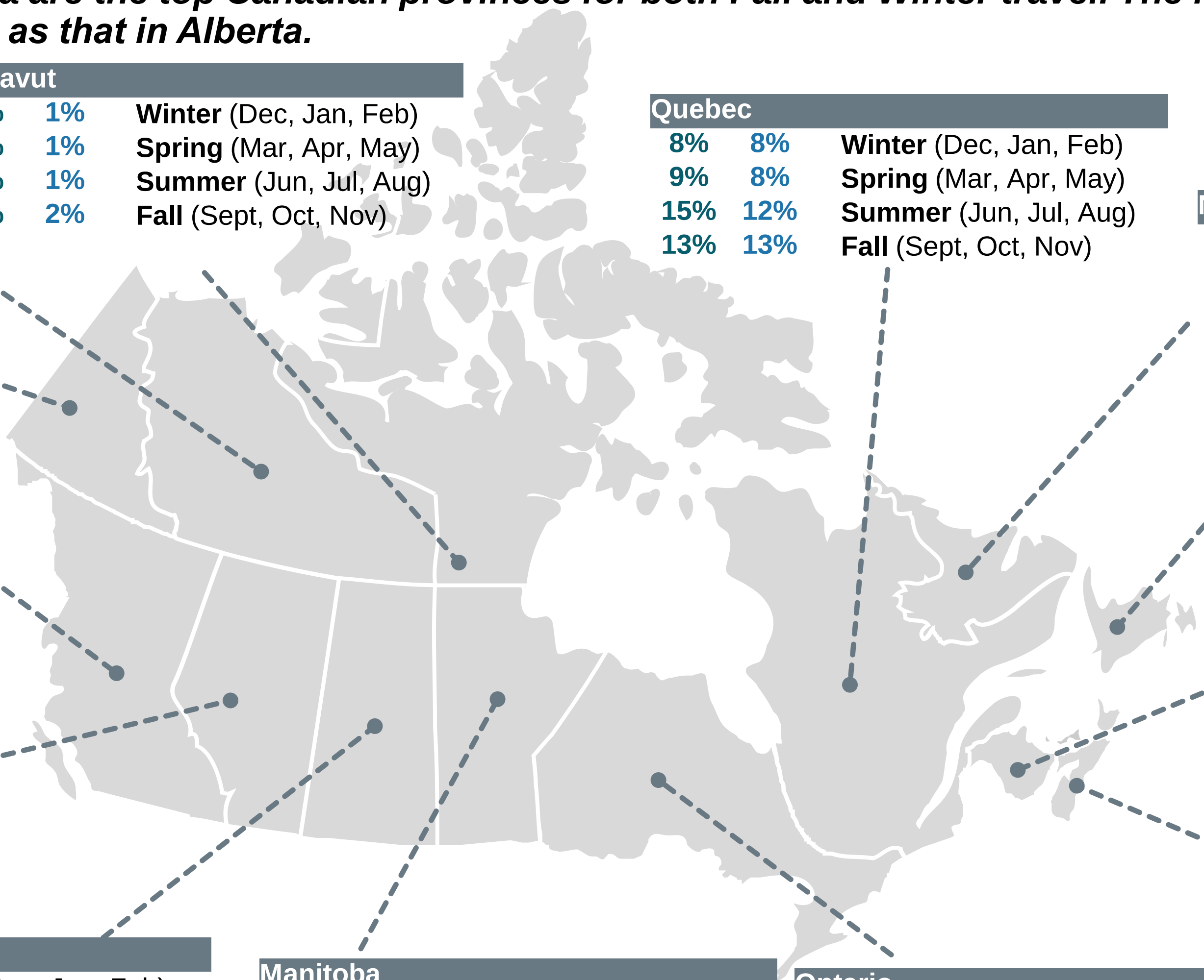
Time of Year Interested in Visiting Canada (Next 2 Years)

DESTINATION CANADA

British Columbia, Ontario and Alberta are the top Canadian provinces for both Fall and Winter travel. The level of interest in Quebec's Fall is the same as that in Alberta.

Total Australia

HVG Audience



Northwest Territories

2%	3%	**Winter** (Dec, Jan, Feb)
3%	2%	**Spring** (Mar, Apr, May)
4%	4%	**Summer** (Jun, Jul, Aug)
3%	4%	**Fall** (Sept, Oct, Nov)

Nunavut

1%	1%	**Winter** (Dec, Jan, Feb)
1%	1%	**Spring** (Mar, Apr, May)
2%	1%	**Summer** (Jun, Jul, Aug)
2%	2%	**Fall** (Sept, Oct, Nov)

Quebec

8%	8%	**Winter** (Dec, Jan, Feb)
9%	8%	**Spring** (Mar, Apr, May)
15%	12%	**Summer** (Jun, Jul, Aug)
13%	13%	**Fall** (Sept, Oct, Nov)

Newfoundland & Labrador

2%	3% (+)	**Winter** (Dec, Jan, Feb)
3%	4%	**Spring** (Mar, Apr, May)
5%	8%	**Summer** (Jun, Jul, Aug)
3%	6% (+)	**Fall** (Sept, Oct, Nov)

Yukon

2%	1%	**Winter** (Dec, Jan, Feb)
3%	3%	**Spring** (Mar, Apr, May)
6%	5%	**Summer** (Jun, Jul, Aug)
4%	4%	**Fall** (Sept, Oct, Nov)

Prince Edward Island

3%	3%	**Winter** (Dec, Jan, Feb)
4%	5%	**Spring** (Mar, Apr, May)
4%	4%	**Summer** (Jun, Jul, Aug)
4%	3%	**Fall** (Sept, Oct, Nov)

British Columbia

16%	19%	**Winter** (Dec, Jan, Feb)
20%	24% (+)	**Spring** (Mar, Apr, May)
26%	25%	**Summer** (Jun, Jul, Aug)
21%	24%	**Fall** (Sept, Oct, Nov)

New Brunswick

2%	3%	**Winter** (Dec, Jan, Feb)
3%	5% (+)	**Spring** (Mar, Apr, May)
3%	5%	**Summer** (Jun, Jul, Aug)
3%	3%	**Fall** (Sept, Oct, Nov)

Alberta

10%	13% (+)	**Winter** (Dec, Jan, Feb)
13%	14%	**Spring** (Mar, Apr, May)
18%	17%	**Summer** (Jun, Jul, Aug)
12%	13%	**Fall** (Sept, Oct, Nov)

Nova Scotia

4%	5%	**Winter** (Dec, Jan, Feb)
6%	6%	**Spring** (Mar, Apr, May)
8%	8%	**Summer** (Jun, Jul, Aug)
6%	6%	**Fall** (Sept, Oct, Nov)

Saskatchewan

3%	5%	**Winter** (Dec, Jan, Feb)
5%	9% (+)	**Spring** (Mar, Apr, May)
6%	7%	**Summer** (Jun, Jul, Aug)
4%	4%	**Fall** (Sept, Oct, Nov)

Manitoba

3%	5% (+)	**Winter** (Dec, Jan, Feb)
5%	9% (+)	**Spring** (Mar, Apr, May)
6%	9% (+)	**Summer** (Jun, Jul, Aug)
4%	7% (+)	**Fall** (Sept, Oct, Nov)

Ontario

12%	16% (+)	**Winter** (Dec, Jan, Feb)
15%	19% (+)	**Spring** (Mar, Apr, May)
24%	26%	**Summer** (Jun, Jul, Aug)
18%	21%	**Fall** (Sept, Oct, Nov)

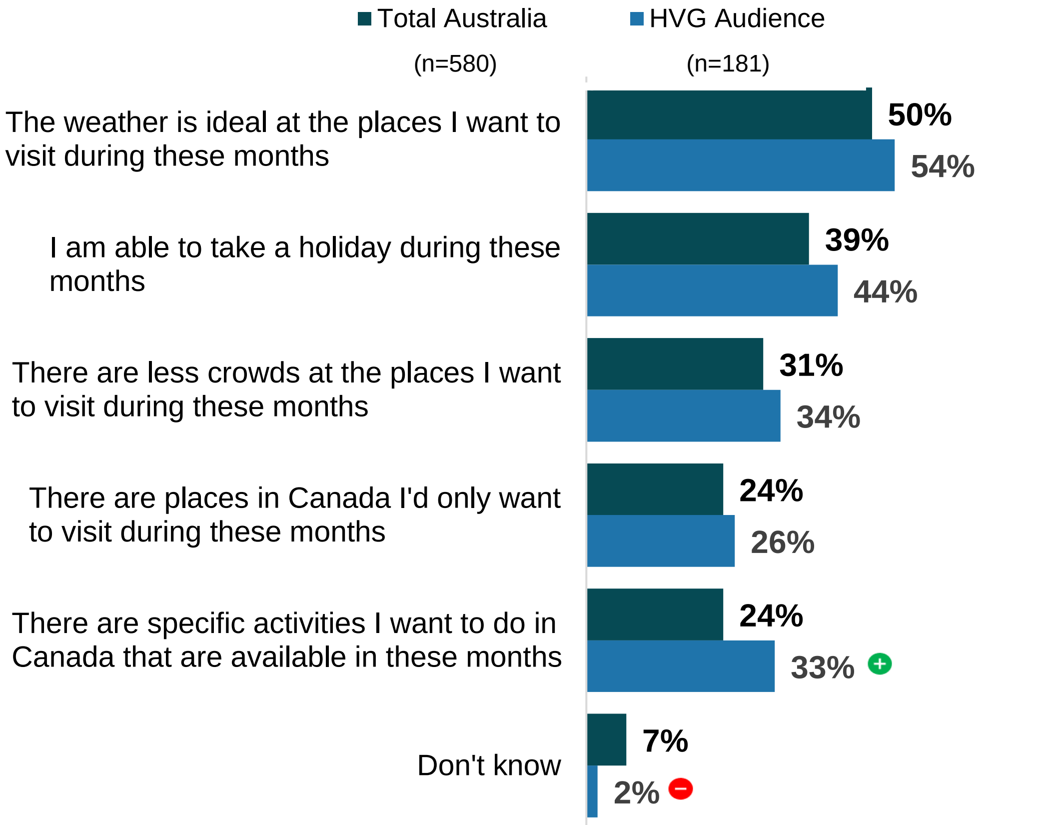
Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1136); HVG (n=333)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

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

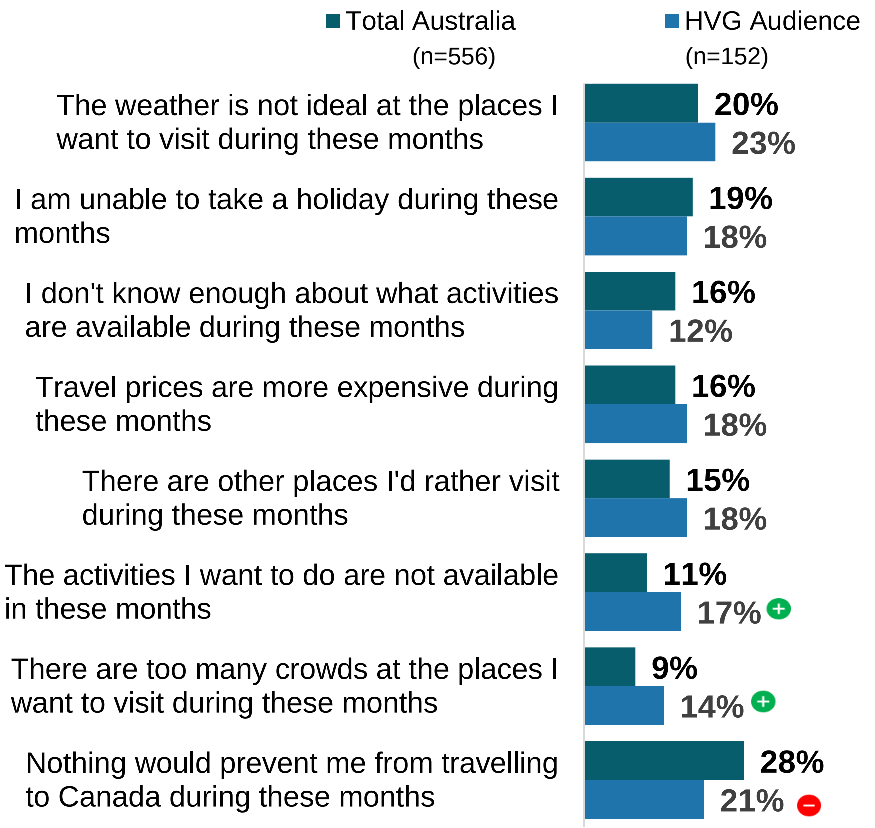
Motivators & Barriers for Fall Travel to Canada

Weather is the biggest motivator and barrier for travelling to Canada during the Fall. Being unable to take a holiday is also a deterrent for travelling in the Fall. Of note, HVGs are significantly more likely to mention a specific activity they want to do during Fall travel, and conversely the unavailability of activities is a barrier.

Motivators for Fall Travel



Barriers for Fall Travel



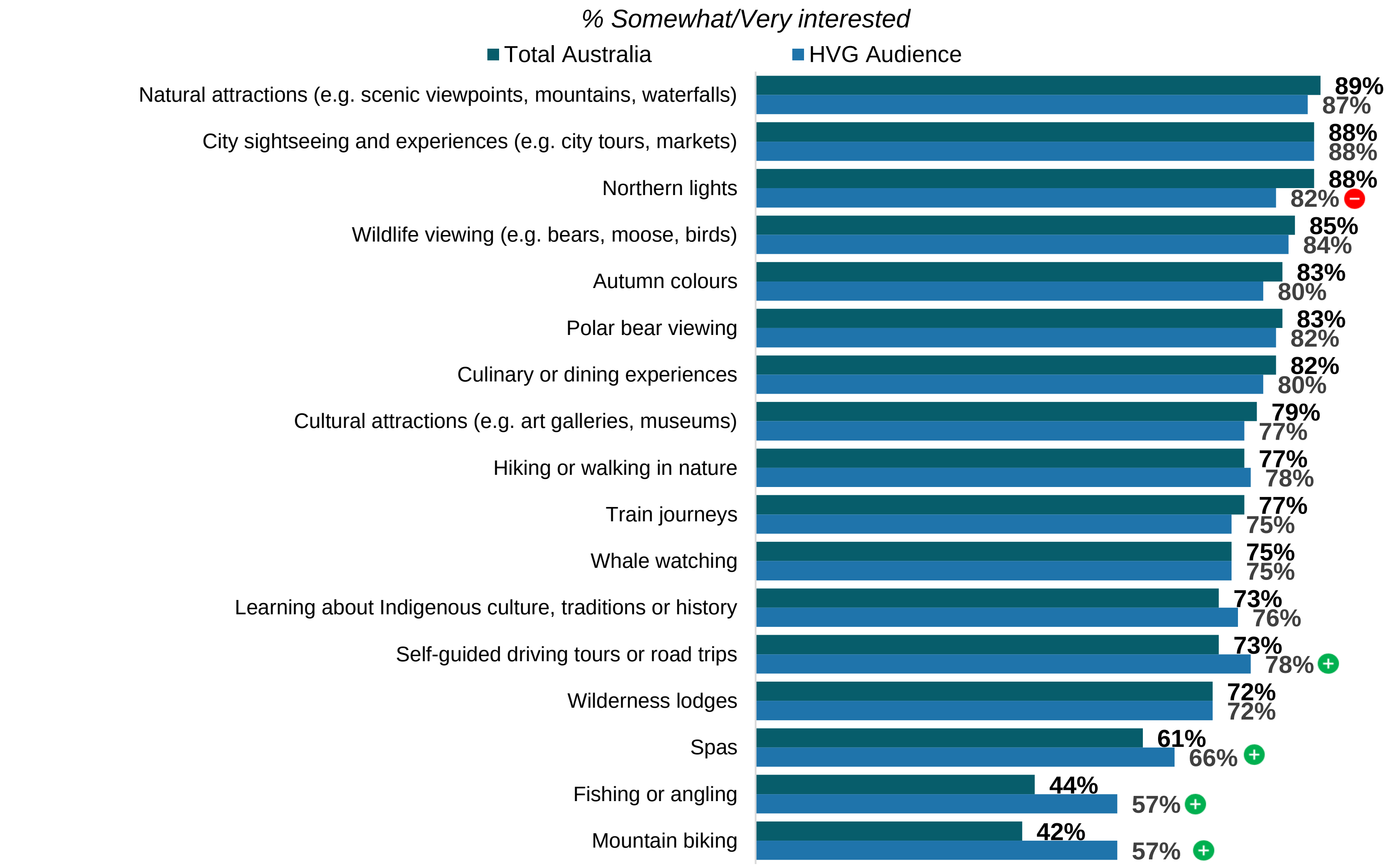
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

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

Interest in Fall Activities in Canada

DESTINATION CANADA

Natural attractions, city sightseeing, and the Northern lights are the top experiences Australian travellers are interested in during a Fall trip to Canada. Of note, HVGs are less likely to be interested in the Northern lights, and more interested in self-guided driving tours/road trips, spas, fishing or angling, and mountain biking.



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1136); HVG (n=333)
E11. What is your level of interest in the following activities or experiences in Canada during the **autumn season**?

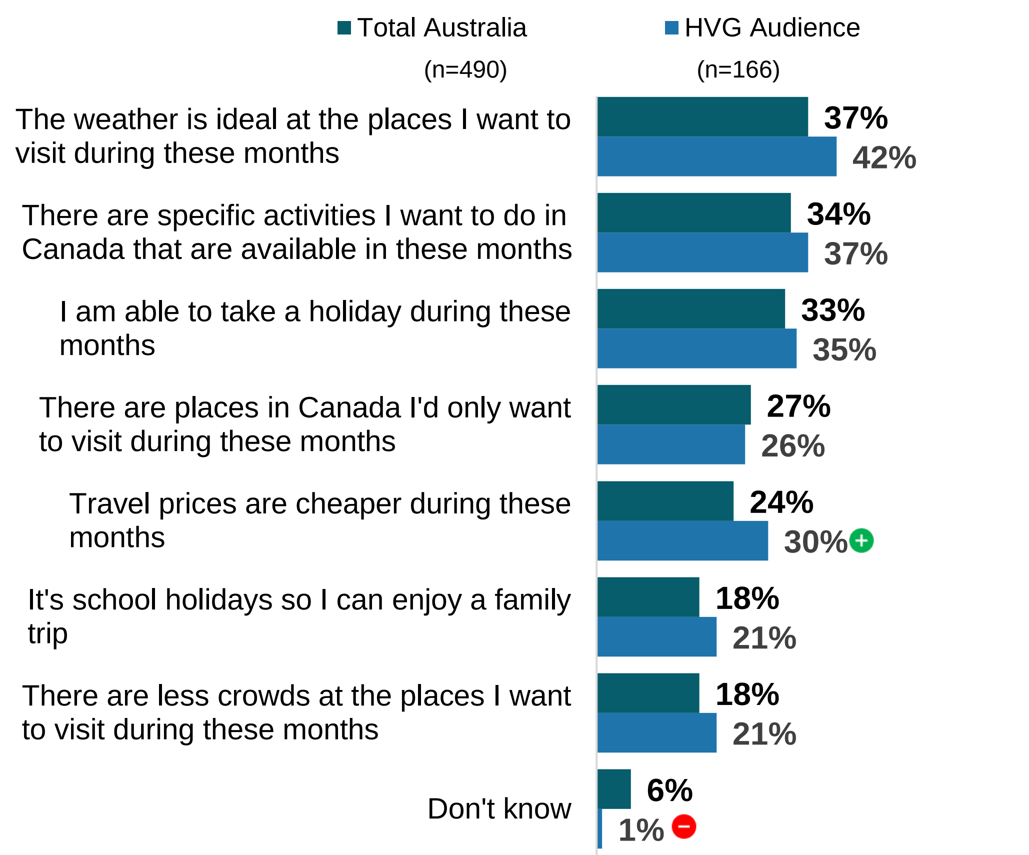
/ = significantly higher/lower result (vs. Total)

Motivators & Barriers for Winter Travel to Canada

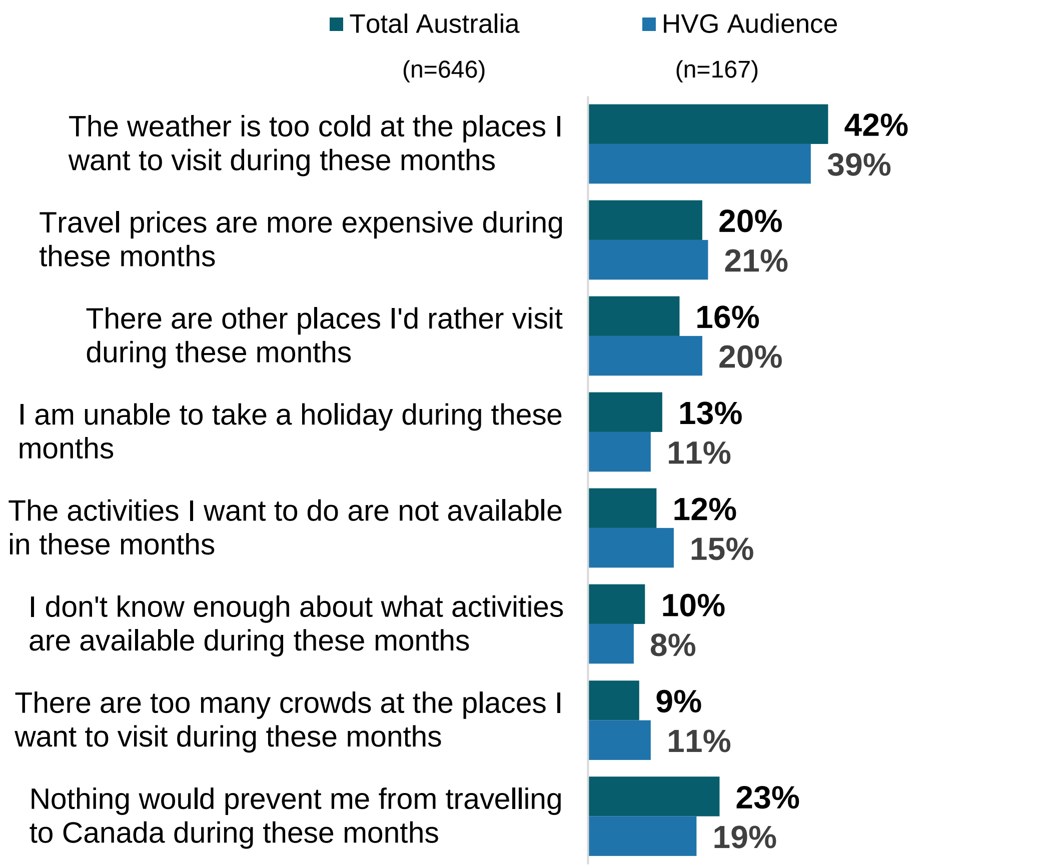
DESTINATION CANADA

Weather is also mentioned as a motivator or barrier for travelling in the Winter months to Canada. HVGs in particular are more likely to say cheaper travel prices as a motivator for Winter travel.

Motivators for Winter Travel



Barriers for Winter Travel

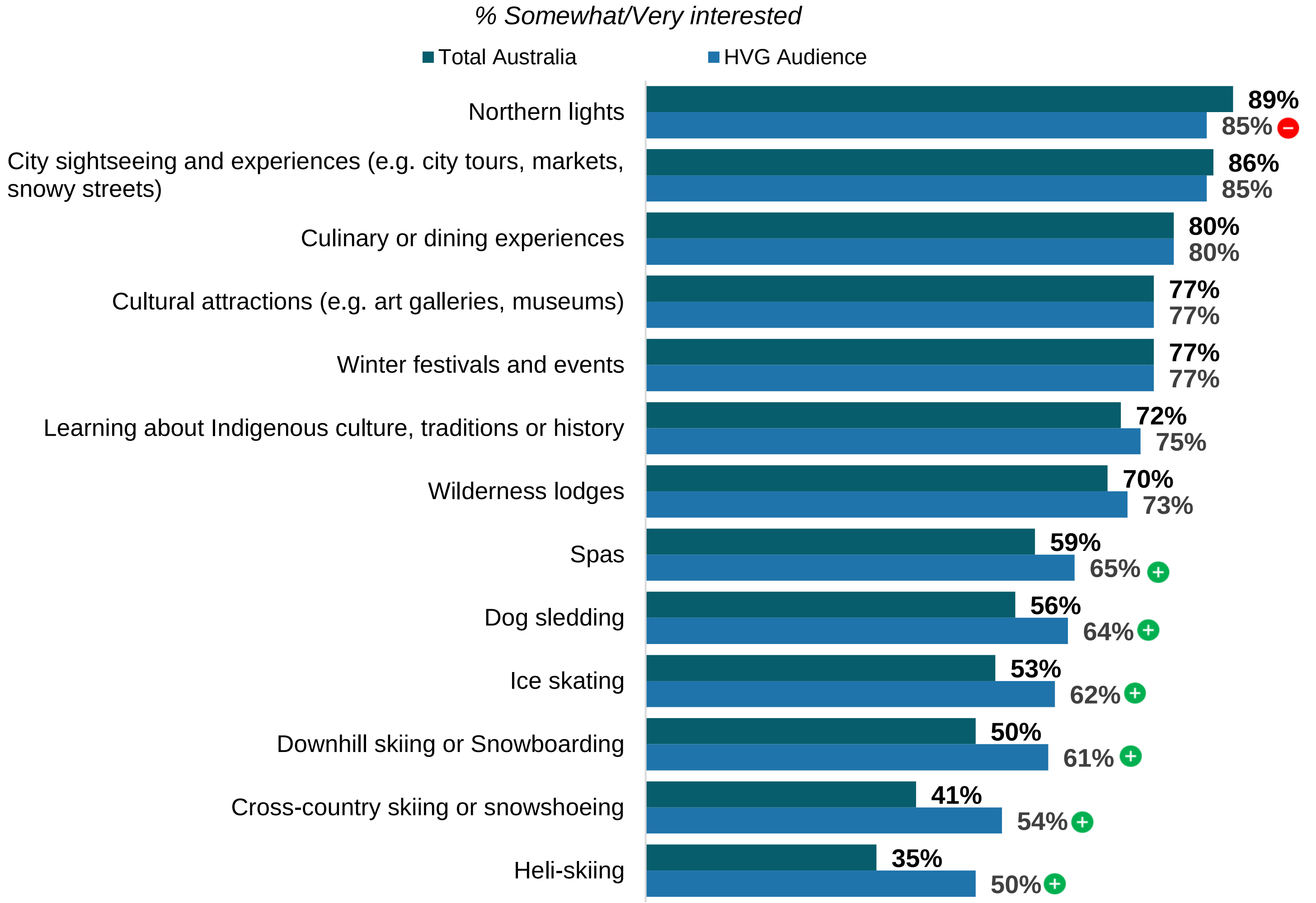


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?

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

Interest in Winter Activities in Canada

The Northern lights, city sightseeing, and culinary or dining experiences are of greatest interest for travellers to Canada in Winter. HVGs are less likely to be interested in the Northern lights, more interested in spas, dog sledding, and skating, skiing or snowboarding.



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1136); HVG (n=333)
E10. What is your level of interest in the following activities or experiences in Canada during the **winter season**?

+ / – = significantly higher/lower result (vs. Total)

Sustainability

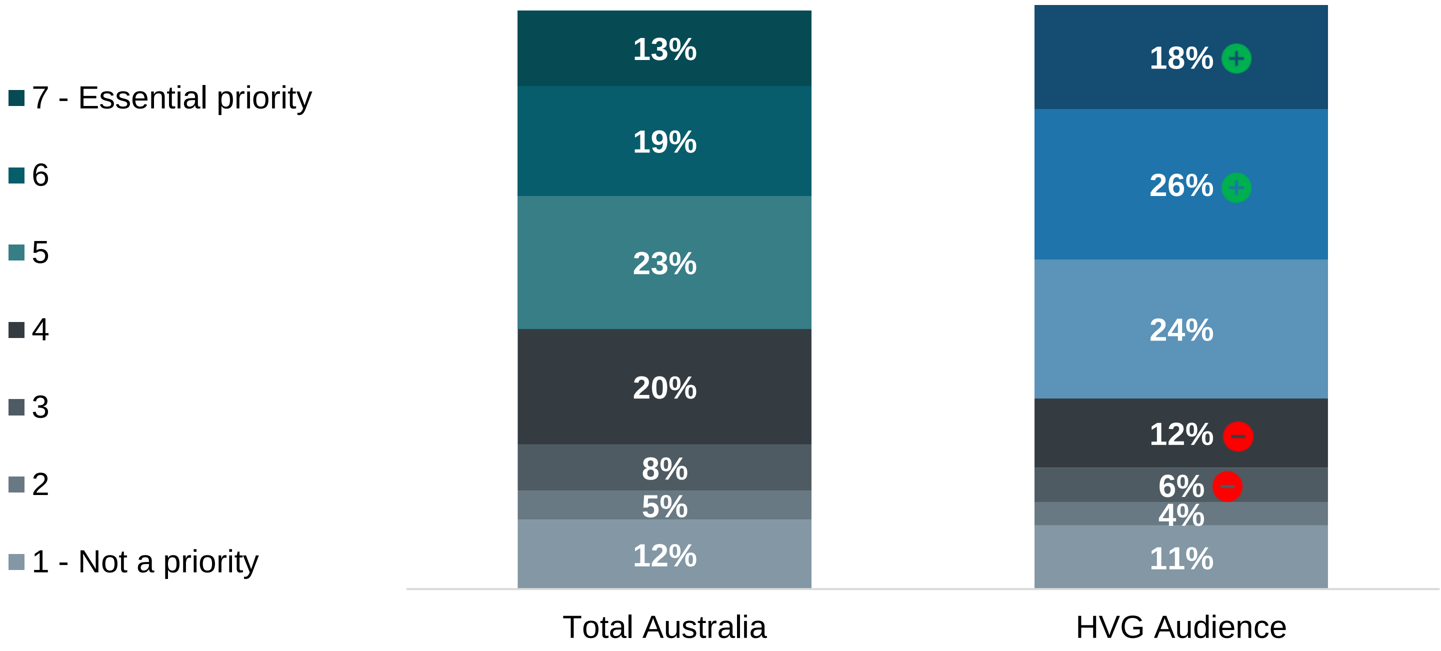
Priority of Sustainable Travel When Planning a Trip

DESTINATION CANADA

Sustainability is a moderate priority for most Australian travellers, and is greater amongst the HVG audience. Canada and Japan are most likely to be perceived as an environmentally-friendly destination, but Canada falls behind Japan on socially responsibility.

% Score 5 to 7 (out of 7)

Total Australia	HVG Audience
56%	67% (+)



% Associate [DESTINATION] with…	*Is an environmentally friendly travel destination*	
	Total AU	HVG
Canada	44%	46%
Netherlands	38%	30% (−)
Japan	43%	45%

% Associate [DESTINATION] with…	*Is a socially responsible travel destination*	
	Total AU	HVG
Canada	45%	44%
Netherlands	37%	38%
Japan	49%	49%

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".

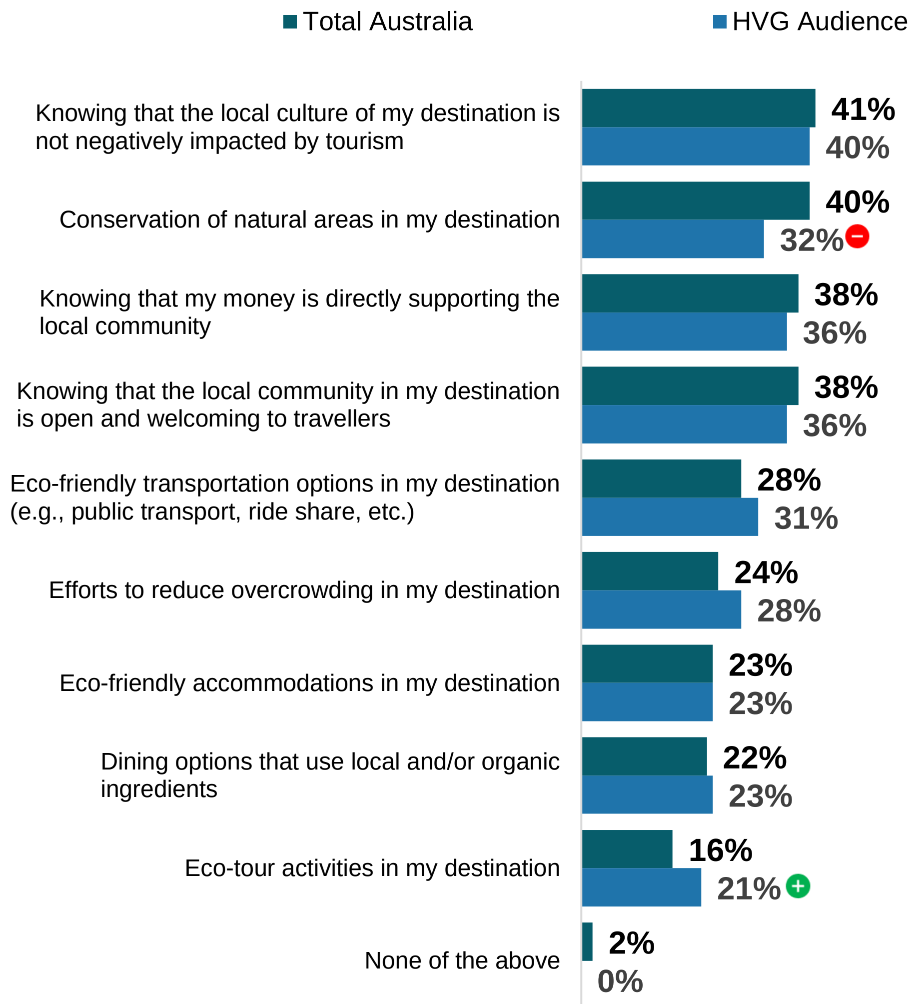
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
C6. We are interested 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.

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

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

The most important sustainability efforts to Australian travellers are the knowledge that the local culture is not negatively impacted by tourism and the conservation of natural areas. Of note, HVGs are less likely to say the conservation of natural areas is important to them; and place higher importance on knowing their money is directly supporting the local community and the community is open and welcoming to travellers.



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”.

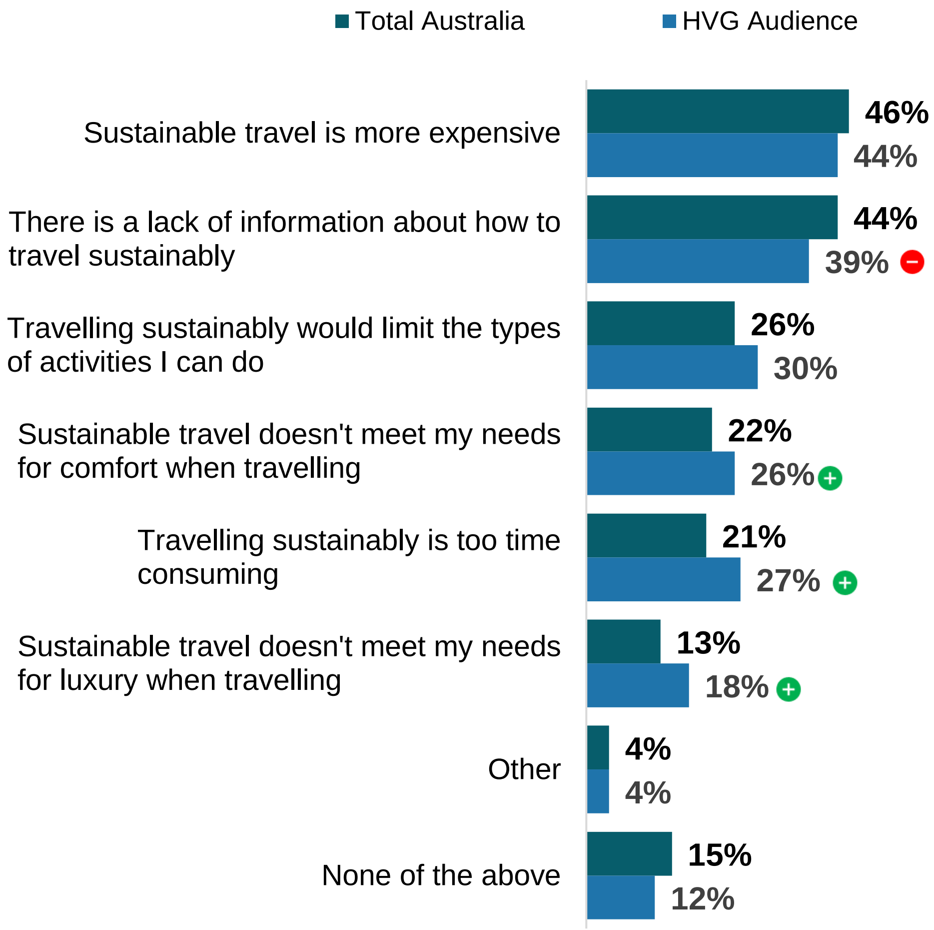
Base: Long-haul holiday travellers (past 3 years or next 2 years), Rated 5-7 at D7 (n=888); HVG (n=292)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

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

Barriers to Sustainable Travel

DESTINATION CANADA

The biggest barriers to sustainable travel are the perception that it is more expensive and there is a lack of information around it. HVGs are more likely to say sustainable travel doesn't meet their needs for comfort or luxury and is too time consuming.



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".

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

+ / – = significantly higher/lower result (vs. Total)

Indigenous Tourism

Unaided Mentions – Indigenous Cultural & Tourism Activities

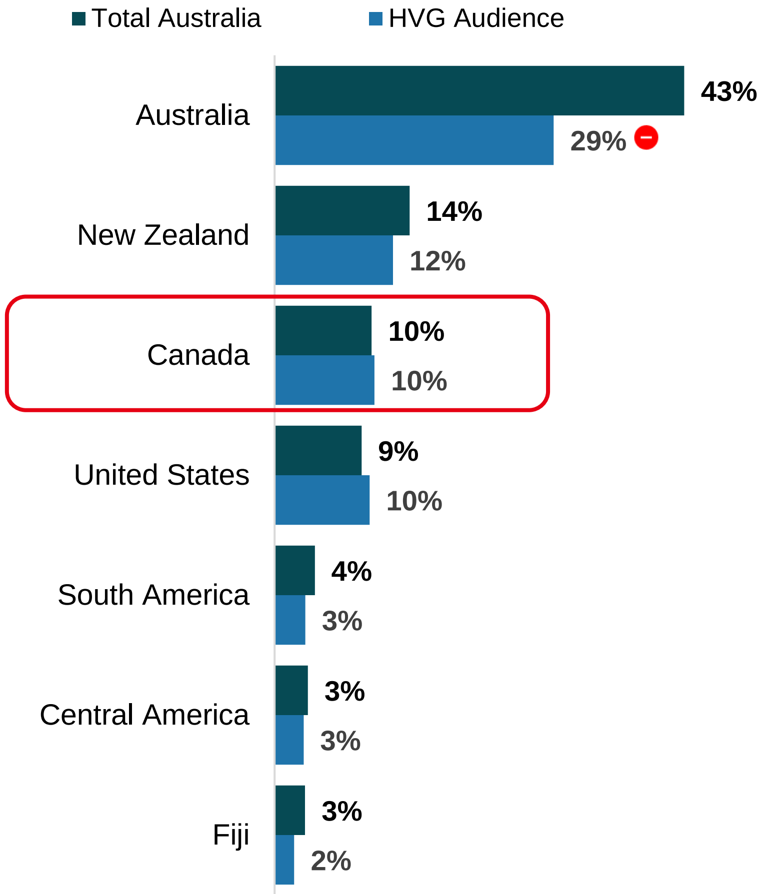
The culture, followed by exploring tourist places/attractions are the top activities that come to mind when it comes to Indigenous tourism. Australia and New Zealand are the top mentioned destinations for Indigenous tourism; while Canada ranks 3rd.

Indigenous Peoples Description

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.

Activities

Tourism Destinations

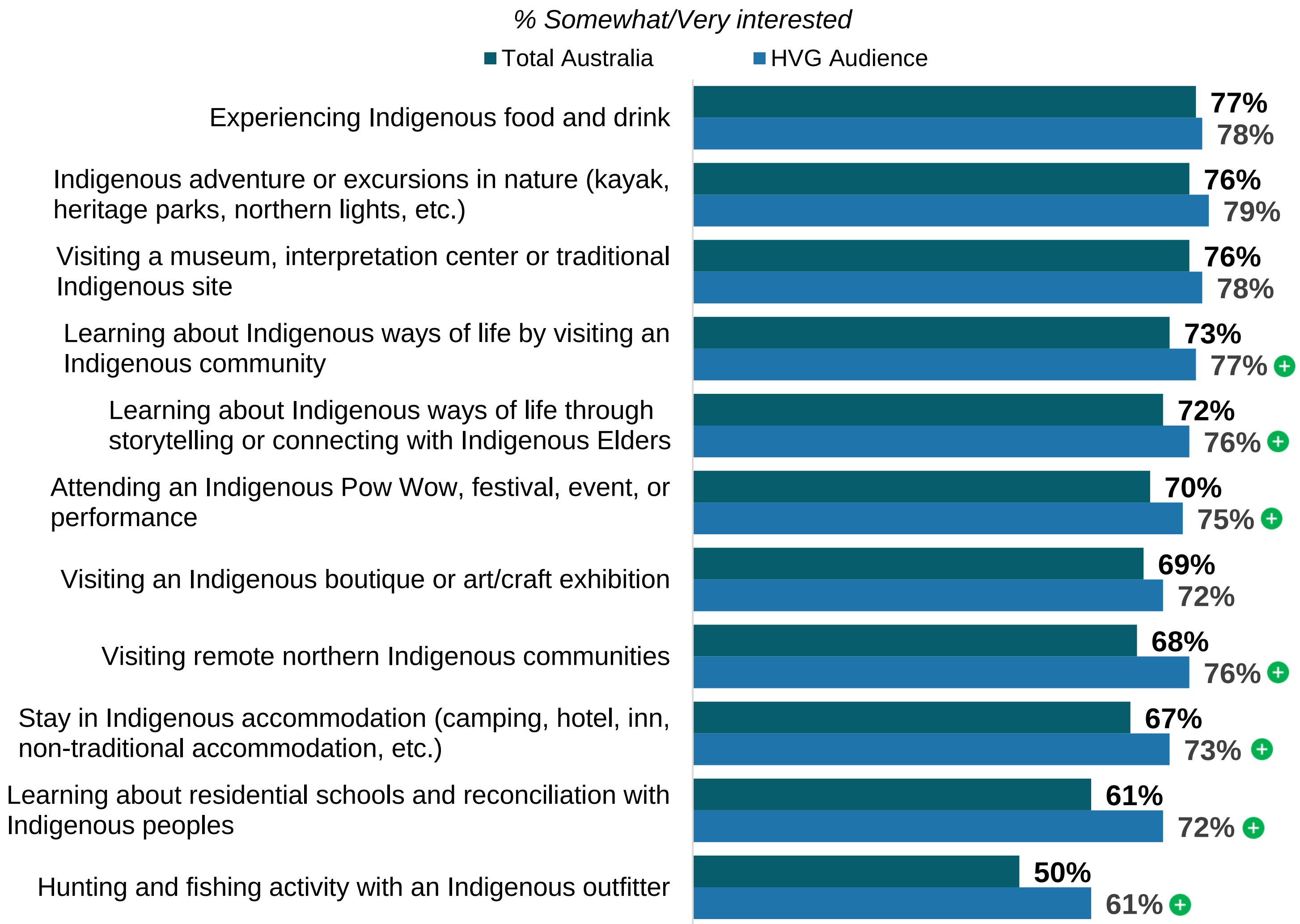


Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Australia, New Zealand and the Pacific Islands.) Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

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

Interest in Indigenous Cultural & Tourism Activities

There is stronger interest in more generally experiencing the Indigenous culture through food and drink, excursions in nature and visiting museums. Interest is not as strong for learning about residential schools/reconciliation or activities such as hunting/fishing. HVGs have a higher overall interest in Indigenous activities compared to total Australian travellers.



Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1136); HVG (n=333)
E12. [DESCRIPTION] What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada?

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

THANK YOU

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