2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT
TOTAL AUSTRALIA VS. HIGH VALUE GUEST AUDIENCE

DESTINATION CANADA

CANADIAN TOURISM DATA collective

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Australia GTRP – December 2023

Kananaskis Country
Alberta

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+ 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**

- 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.

Market Sizing

Incidence of Long-Haul Holiday Travel (General Population)

DESTINATION CANADA

39%

Took a Long-Haul^ Holiday Trip in the Past 3 Years

Plan to Take Long-Haul Holiday Trip in Next 2 Years

Definitely	**23%**
Very likely	**21%**
Somewhat likely	**19%**
Not very likely	**12%**
Not at all likely	**21%**

44%

Incidence Rate

51.5%
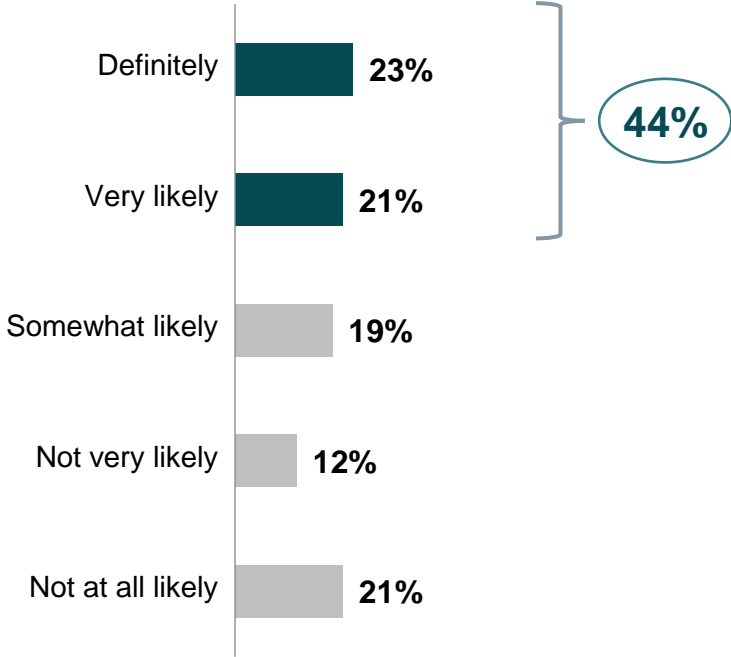
Total long-haul holiday travel incidence (past 3 years/planned next 2 years)

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

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Long-Haul Holiday Traveller Sizing

Total population aged 18 years or more[1]

20,129,000

x

Incidence rate

51.5%

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

=

Size of the target market

10,366,500

Australia GTRP – December 2023

Potential Market Size For Canada

DESTINATION CANADA

Size of the Potential Market to Canada (Next 2 Years)

Total potential long-haul holiday travellers aged 18 years or more		**Target Market for Canada**		Size of the target market		**Immediate Potential for Canada**		Immediate potential
10,366,500	x	**71.5%**	=	**7,412,000**	x	**45.7%**	=	**3,387,500**
		Those in the dream to purchase stages of the path to purchase for Canada				Will definitely/very likely visit Canada in the next 2 years[1]		

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul 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)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

Potential Market Size For Canada

Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*
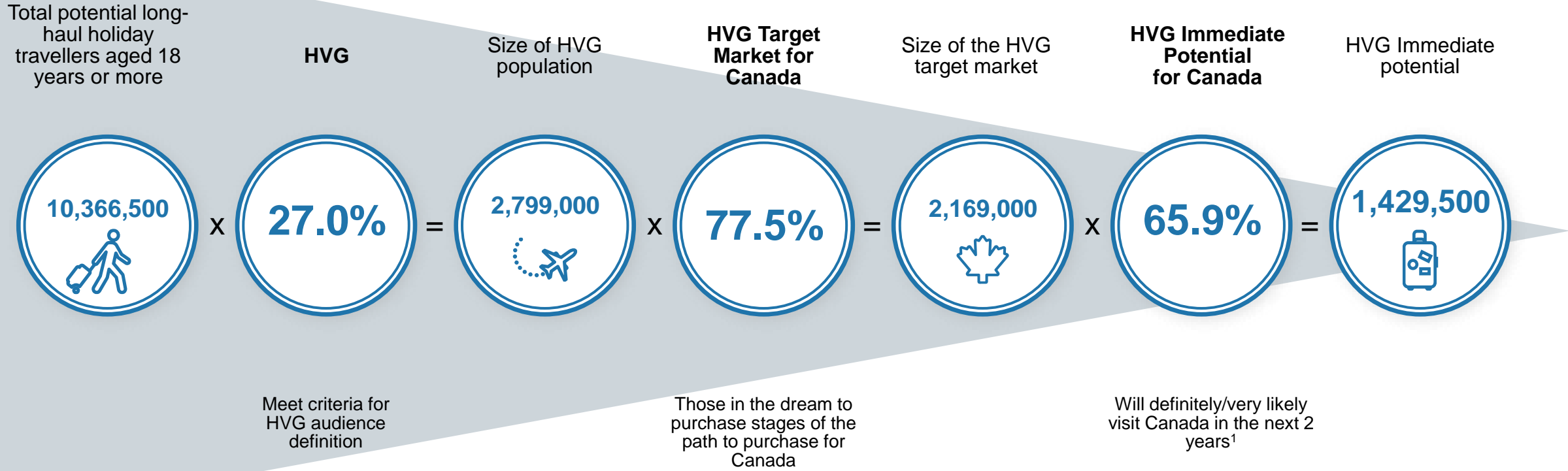
Total potential long-haul holiday travellers aged 18 years or more		HVG		Size of HVG population		HVG Target Market for Canada		Size of the HVG target market		HVG Immediate Potential for Canada		HVG Immediate potential
10,366,500	x	**27.0%**	=	**2,799,000**	x	**77.5%**	=	**2,169,000**	x	**65.9%**	=	**1,429,500**
		Meet criteria for HVG audience definition				Those in the dream to purchase stages of the path to purchase for Canada				Will definitely/very likely visit Canada in the next 2 years[1]		

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul 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)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

Potential Market Size for the Regions

DESTINATION CANADA

Immediate Potential for Canada:
Total Australia:	**3,387,500**
HVG Audience:	**1,429,500**

Total Australia

HVG Audience

Key:
% likely to visit region
Immediate potential (000s)

YT
12.0% 9.6%
407 *137*

NWT
8.7% 9.0%
295 *129*

NU
4.4% 3.6%
149 *52*

NL
11.0% 13.8%
373 *198*

BC
64.6% 62.0%
2,189 *887*

AB
43.5% 41.2%
1,474 *589*

MB
13.9% 18.8%
471 *269*

QC
38.4% 30.9%
1,301 *442*

PEI
10.1% 8.4%
342 *120*

SK
14.4% 14.3%
488 *205*

ON
58.5% 53.7%
1,982 *768*

NB
7.9% 9.3%
268 *133*

NS
16.9% 15.3%
573 *219*

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1136); HVG (n=333)
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

Australia GTRP – December 2023

Key Performance Indicators

Prince Albert National Park
Saskatchewan

Key Performance Indicators

Indicator	Definition	All Long-haul Travellers (n=1590)	HVG Audience (n=431)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[1]	**9%**	**15%** ⊕
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	**42%**	**59%** ⊕
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	**35%**	**50%** ⊕
Past visitation	% who have ever visited Canada for pleasure	**35%**	**55%** ⊕

[1] For trips in the next 2 years.
Base: Long-haul holiday travellers (past 3 years or next 2 years)
B1. You mentioned that you are likely to take a long-haul holiday trip **outside of Australia, New Zealand and the Pacific Islands** in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)
C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)
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)

Key Performance Indicators: Seasonal & Indigenous

DESTINATION CANADA

Indicator	Definition	All Long-haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada[1]	**17%**	**21%**
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November[2]	**38%**	**36%**
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada[1]	**28%**	**28%**
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February[2]	**33%**	**36%**
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	**10%**	**10%**

[1]Among respondents who answered about winter/fall travel
[2]Among those in the dream to purchase stages of the path to purchase to Canada
Base: Long-haul holiday travellers (past 3 years or next 2 years)
B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=811); HVG (n=219)
B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=779); HVG (n=212)
C7. For each of the following destinations, during which months would you consider taking a holiday trip <u>in the next 2 years</u>? Total (n=1136); HVG (n=333)
B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1590); HVG (n=431)

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

Market Outlook

Market Outlook

Indicator	Definition	All Long-haul Travellers (n=1590)	HVG Audience (n=431)
Incidence of long-haul holiday travel	% who have taken a long-haul holiday trip in the past 3 years	**75%**	**100%** ⊕
Long-haul travel intentions	% who plan[1] to take a long-haul pleasure trip in the next 2 years	**82%**	**100%** ⊕
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of Australia, New Zealand and the Pacific Islands in the next 12 months MINUS % who will <u>spend a little less</u>	**+22%**	**+45%**

[1] Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.
Base: Long-haul holiday travellers (past 3 years or next 2 years)
A7. In the past 3 years, have you taken a long-haul holiday trip of 4 or more nights **outside of Australia, New Zealand and the Pacific Islands** where you spent at least 1 night in paid accommodations? (Select one only)
A9. In the next 2 years, how likely is it that you will take a long-haul holiday trip of 4 or more nights **outside of Australia, New Zealand and the Pacific Islands** where you will spend at least 1 night in paid accommodations? (Select one only)
A5. How would you describe your spending intentions on the following items <u>in the next 12 months</u> compared to the 12 months? Will you spend…

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

Spending Intentions (in Next 12 Months)

DESTINATION CANADA

Travelling within Australia

Travelling within New Zealand and the Pacific Islands

Travelling outside Australia, New Zealand and the Pacific Islands

Legend:
- ■ A little more
- ■ About the same
- ■ A little less

	Travelling within Australia		Travelling within New Zealand and the Pacific Islands		Travelling outside Australia, New Zealand and the Pacific Islands	
	Total Australia	HVG Audience	Total Australia	HVG Audience	Total Australia	HVG Audience
A little more	34%	45% ⊕	24%	40% ⊕	44%	56% ⊕
About the same	50%	42% ⊖	48%	40% ⊖	35%	33%
A little less	16%	13%	28%	20% ⊖	22%	11% ⊖
Travel Market Outlook	**+17%**	**+31%**	**-3%**	**+19%**	**+22%**	**+45%**

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
A5. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend…

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

Types of Travel Trips

| Total Australia | HVG Audience |

■ Sometimes (once every 2 years)　■ Regularly (once a year)　■ Often (several times a year)　■ Very often (about once a month or more)　At least every 2 years

Domestic holiday trips (within my home country)

Total Australia: 11% | 28% | 29% | 7% — **75%**
HVG Audience: 9% | 27% | 33% | 20% ⊕ — **88%** ⊕

International holiday trips (outside my home country)

Total Australia: 20% | 26% | 11% | 4% — **62%**
HVG Audience: 14% ⊖ | 39% ⊕ | 28% ⊕ | 10% ⊕ — **92%** ⊕

Business trips and meetings (outside my home country)

Total Australia: 4% | 7% | 7% | 5% — **24%**
HVG Audience: 5% | 13% ⊕ | 18% ⊕ | 15% ⊕ — **50%** ⊕

Trips to attend business conferences or events (outside my home country)

Total Australia: 5% | 6% | 6% | 6% — **23%**
HVG Audience: 6% | 13% | 13% ⊕ | 17% ⊕ — **49%** ⊕

Added personal holiday days to a business trip

Total Australia: 5% | 7% | 8% | 4% — **25%**
HVG Audience: 7% | 13% ⊕ | 20% ⊕ | 11% ⊕ — **51%** ⊕

Holiday trips where I choose to also work remotely from my destination

Total Australia: 5% | 9% | 7% | 5% — **26%**
HVG Audience: 6% | 18% ⊕ | 15% ⊕ | 14% ⊕ — **52%** ⊕

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?

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

Long-Haul Travel Intensity

% Taking 3 or more Trips

Total Australia	HVG Audience
36%	74% ⊕

Legend:
- 5+ trips
- 3 to 4 trips
- 2 trips
- 1 trip
- No trip

Total Australia
- 13%
- 23%
- 18%
- 22%
- 25%

HVG Audience
- 25% ⊕
- 49% ⊕
- 26% ⊕

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
A8. How many holiday trips have you taken in the past 3 years?

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

Canada vs. Competitors

DESTINATION CANADA

Peggy's Cove
Nova Scotia

Past Visitation

Total Australia

HVG Audience

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

	Total Australia			HVG Audience		
	Visited more than 3 years ago	Visited in the past 3 years	Ever visit	Visited more than 3 years ago	Visited in the past 3 years	Ever visit
United Kingdom	38%	20%	*58%*	39%	36% +	*75%* +
United States	40%	17%	*57%*	38%	33% +	*71%* +
France	37%	14%	*51%*	40%	25% +	*65%* +
Italy	33%	13%	*46%*	37% +	24% +	*61%* +
Germany	33%	10%	*43%*	36%	22% +	*58%* +
Spain	29%	9%	*38%*	35% +	20% +	*55%* +
Japan	22%	15%	*37%*	23%	33% +	*56%* +
Canada	23%	13%	*35%*	28% +	27% +	*55%* +
Netherlands	27%	9%	*35%*	30%	18% +	*48%* +
Greece	23%	8%	*31%*	30% +	16% –	*46%* +
Other	38%	27%	*65%*	28% –	34% +	*62%*

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?

Australia GTRP – December 2023

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

Unaided Long-Haul Destination Consideration (Next 2 Years)

DESTINATION CANADA

Top Destination Brands[1]

■ Total Australia ■ HVG Audience

	Total Australia	HVG Audience
Japan	18%	22% +
United Kingdom	10%	14% +
United States	10%	13% +
Canada	**9%**	**15% +**
Europe	8%	7%
Italy	7%	8%
Thailand	6%	8%
Singapore	6%	8%
France	5%	6%
Bali	5%	4%
Vietnam	4%	6%
Germany	4%	10% +
England	4%	2%
Greece	4%	4%

Top Destinations[2]

■ Total Australia ■ HVG Audience

	Total Australia	HVG Audience
Japan	18%	22% +
United Kingdom	16%	17%
United States	13%	18% +
Canada	**9%**	**15% +**
Europe	8%	7%
Italy	7%	9%
Indonesia	7%	8%
Thailand	7%	8%
France	6%	8%
New Zealand	6%	7%
Singapore	6%	8%
Bali	5%	4%
Vietnam	4%	6%
Germany	4%	10% +
China	4%	7% +
Greece	4%	4%

[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)

Australia GTRP – December 2023

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

Path to Purchase for Canada

DESTINATION CANADA

% NET Active Planning (top 4 box)

17%	32% ⊕

Legend (top to bottom):
- ■ Have already booked my transportation and accommodations
- ■ Am currently making transportation and accommodation arrangements
- ■ Am planning the itinerary for a trip to this country
- ■ Have started to gather some travel information for a trip to this country
- ■ Seriously considering visiting / returning in the next 2 years
- ■ Dreaming about visiting / returning someday
- ■ Not interested in visiting / returning in the foreseeable future
- ■ Have never thought of taking a trip to this destination
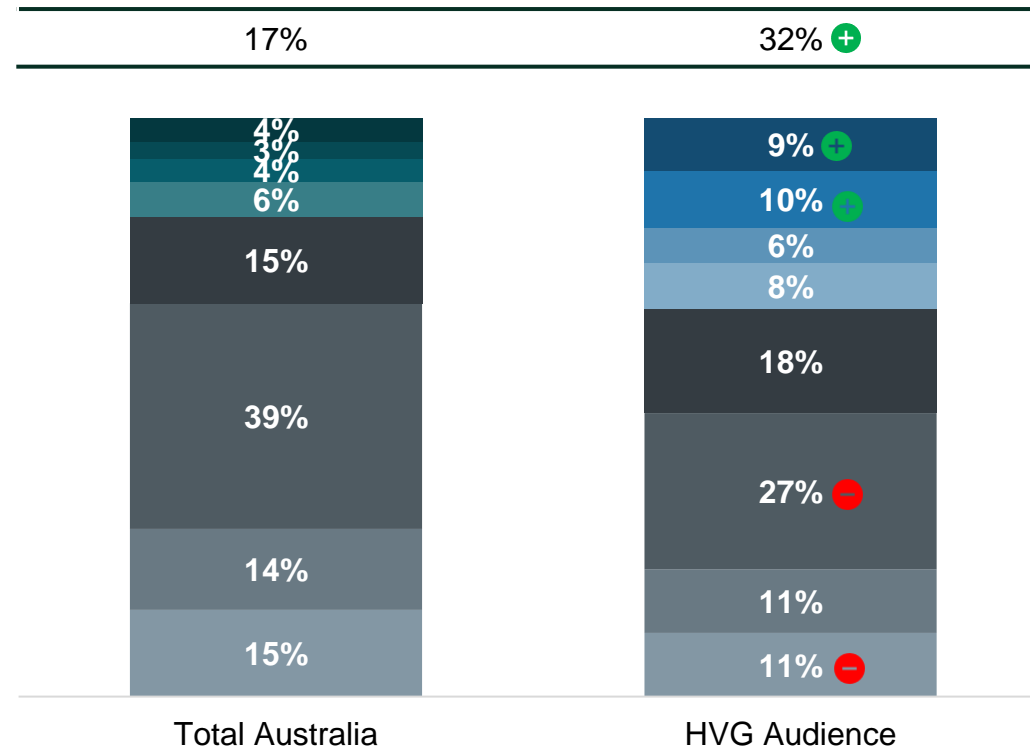
Total Australia:
- 4%
- 3%
- 4%
- 6%
- 15%
- 39%
- 14%
- 15%

HVG Audience:
- 9% ⊕
- 10% ⊕
- 6%
- 8%
- 18%
- 27% ⊖
- 11%
- 11% ⊖

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) (n=1590); HVG (n=431)
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)

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

Stage in the Purchase Cycle: Total Australia

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

Country									NET Active Planning (Top 4 box)
Japan (n=512)	13%	10%	33%	22%	9%	5%	4%	4%	22%
United States (n=508)	11%	22%	32%	16%	7%	4%	4%	5%	19%
United Kingdom (n=537)	8%	19%	35%	19%	6%	6%	4%	3%	18%
Canada (n=1590)	15%	14%	39%	15%	6%	4%	3%	4%	17%
Greece (n=535)	17%	14%	38%	14%	5%	6%	3%	3%	17%
Italy (n=536)	12%	12%	44%	15%	5%	6%	4%	3%	17%
France (n=536)	13%	17%	41%	14%	5%	5%	3%	3%	16%
Germany (n=536)	20%	22%	31%	11%	5%	5%	4%	3%	16%
Spain (n=535)	19%	15%	38%	12%	6%	5%	3%	3%	16%
Netherlands (n=535)	24%	19%	34%	10%	3%	4%	3%		13%

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]
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)

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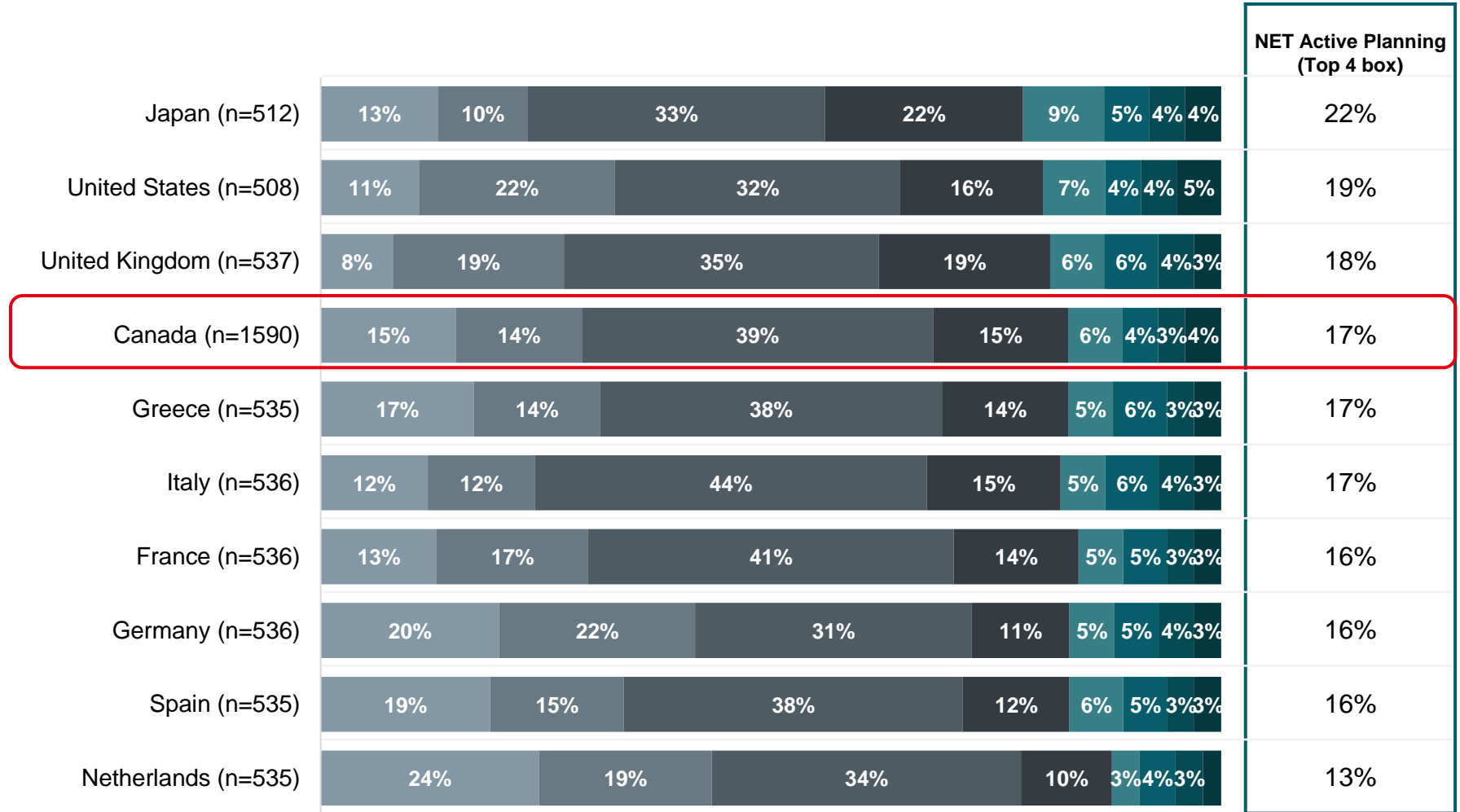
Stage in the Purchase Cycle: Among HVG Audience

DESTINATION CANADA

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

Country									NET Active Planning (Top 4 box)
Japan (n=127)	13%	8%	16% ⊖	25%	10%	8%	6%	13% ⊕	37% ⊕
United States (n=160)	6% ⊖	20%	25% ⊖	17%	8%	4%	11% ⊕	10% ⊕	32% ⊕
United Kingdom (n=155)	6%	10% ⊖	31%	22%	10% ⊕	7%	8% ⊕	6% ⊕	30% ⊕
Canada (n=431)	11% ⊖	11%	27% ⊖	18%	8%	6%	10% ⊕	9% ⊕	32% ⊕
Greece (n=149)	17%	9% ⊖	31% ⊖	14%	6%	7%	7% ⊕	10% ⊕	30% ⊕
Italy (n=146)	6% ⊖	12%	36% ⊖	14%	4%	11% ⊕	10% ⊕	8% ⊕	33% ⊕
France (n=130)	9%	15%	35%	11%	6%	7%	9% ⊕	9% ⊕	31% ⊕
Germany (n=147)	14% ⊖	17%	26%	12%	4%	6%	13% ⊕	8% ⊕	31% ⊕
Spain (n=151)	10% ⊖	16%	25% ⊖	15%	9%	9% ⊕	7% ⊕	8% ⊕	33% ⊕
Netherlands (n=128)	20%	14%	28%	9%	5%	7%	10% ⊕	8% ⊕	29% ⊕

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]
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)

Australia GTRP – December 2023

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

Destination Consideration (Next 2 Years)

DESTINATION CANADA

	Total Australia			HVG Audience		

■ 4 ■ 5 - I am seriously considering   *4 or 5 (out of 5)*

	Total Australia 4	Total Australia 5	Total	HVG 4	HVG 5	HVG Total
Japan	22%	33%	**55%**	26%	41% ⊕	**66%** ⊕
United Kingdom	19%	31%	**50%**	26% ⊕	37% ⊕	**63%** ⊕
Italy	23%	24%	**47%**	30% ⊕	30% ⊕	**60%** ⊕
Canada	21%	21%	**42%**	27% ⊕	32% ⊕	**59%** ⊕
United States	18%	25%	**42%**	19%	38% ⊕	**56%** ⊕
France	20%	20%	**40%**	27% ⊕	29% ⊕	**56%** ⊕
Greece	22%	17%	**39%**	29% ⊕	21% ⊕	**51%** ⊕
Spain	20%	17%	**36%**	27% ⊕	23% ⊕	**50%** ⊕
Germany	19%	15%	**34%**	26% ⊕	21% ⊕	**47%** ⊕
Netherlands	16%	16%	**31%**	20% ⊕	23% ⊕	**43%** ⊕

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where
1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

Australia GTRP – December 2023

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

Destination Consideration By Seasons

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 [DESTINATION]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

Australia GTRP – December 2023

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

Knowledge of Holiday Opportunities

Total Australia				HVG Audience			
Very good ▪ **Excellent** *Very good/Excellent*							
United Kingdom (n=537)	26%	23%	**49%**	United Kingdom (n=155)	26%	39% ➕	**65%** ➕
United States (n=508)	25%	20%	**44%**	United States (n=160)	26%	33% ➕	**58%** ➕
Italy (n=536)	24%	16%	**40%**	Italy (n=146)	27%	29% ➕	**57%** ➕
Japan (n=512)	26%	14%	**39%**	Japan (n=127)	31%	25% ➕	**57%** ➕
Canada (n=1590)	18%	17%	**35%**	Canada (n=431)	17%	34% ➕	**50%** ➕
France (n=536)	19%	15%	**34%**	France (n=130)	21%	31% ➕	**53%** ➕
Greece (n=535)	20%	14%	**34%**	Greece (n=149)	17%	28% ➕	**45%** ➕
Germany (n=536)	17%	16%	**33%**	Germany (n=147)	13%	36% ➕	**49%** ➕
Spain (n=535)	19%	11%	**30%**	Spain (n=151)	19%	25% ➕	**44%** ➕
Netherlands (n=535)	15%	10%	**25%**	Netherlands (n=128)	18%	23% ➕	**41%** ➕

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]
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

Australia GTRP – December 2023

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

Destination Fit

	Total Australia					HVG Audience			
	8	9	10 - Exactly what I'm looking for	Top 3 box		8	9	10	Top 3 box
Japan (n=512)	21%	12%	23%	57%	Japan (n=127)	26%	13%	29%	68% +
Italy (n=536)	18%	12%	19%	50%	Italy (n=146)	21%	17% +	26% +	64% +
United Kingdom (n=537)	18%	11%	17%	47%	United Kingdom (n=155)	16%	22% +	26% +	64% +
Canada (n=1590)	18%	13%	15%	46%	Canada (n=431)	20%	20% +	20% +	61% +
Greece (n=535)	17%	13%	17%	46%	Greece (n=149)	20%	18% +	17%	55% +
France (n=536)	16%	12%	13%	41%	France (n=130)	17%	22% +	16%	55% +
Spain (n=535)	19%	10%	12%	40%	Spain (n=151)	23%	16% +	16% +	55% +
United States (n=508)	15%	12%	12%	40%	United States (n=160)	18%	18% +	17%	53% +
Germany (n=536)	15%	8%	12%	35%	Germany (n=147)	16%	14% +	22% +	52% +
Netherlands (n=535)	13%	8%	9%	30%	Netherlands (n=128)	18%	12%	13%	43% +

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]
C3. Please rate each destination in terms of what you are looking for in a holiday destination.

Australia GTRP – December 2023

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

Destination Appeal

Total Australia

HVG Audience

■ 8   ■ 9   ■ 10 - Agree completely   *Top 3 box*

Total Australia	8	9	10	Top 3 box		HVG Audience	8	9	10	Top 3 box
Japan (n=512)	18%	14%	29%	*61%*		Japan (n=127)	17%	22% +	30%	*69%* +
Italy (n=536)	18%	15%	24%	*56%*		Italy (n=146)	19%	25% +	29%	*74%* +
United Kingdom (n=537)	16%	14%	23%	*54%*		United Kingdom (n=155)	16%	23% +	30% +	*69%* +
Canada (n=1590)	16%	12%	22%	*50%*		Canada (n=431)	16%	19% +	27% +	*63%* +
Greece (n=535)	16%	13%	21%	*50%*		Greece (n=149)	17%	20% +	23%	*60%* +
United States (n=508)	16%	13%	16%	*46%*		United States (n=160)	18%	21% +	20%	*59%* +
Spain (n=535)	16%	12%	17%	*45%*		Spain (n=151)	16%	18% +	20%	*54%* +
France (n=536)	14%	12%	17%	*44%*		France (n=130)	11%	23% +	21%	*55%* +
Germany (n=536)	14%	10%	14%	*38%*		Germany (n=147)	14%	15% +	23% +	*52%* +
Netherlands (n=535)	12%	9%	13%	*33%*		Netherlands (n=128)	14%	13% +	19% +	*46%* +

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]
C4. Please indicate how much you agree or disagree with the following statement for each destination. *"Is a destination that has a great deal of personal appeal to me"*

Australia GTRP – December 2023

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

Net Promoter Score (NPS)

DESTINATION CANADA

	Total Australia			NPS		HVG Audience			NPS
	Detractors (0-6)	Passives (7-8)	Promoters (9-10)						
Japan (n=588)	12%	27%	61%	+48%	Japan (n=240)	10%	26%	63%	+53%
Italy (n=747)	16%	32%	52%	+37%	Italy (n=266)	12% ⊖	34%	54%	+42%
Canada (n=562)	17%	31%	52%	+35%	Canada (n=241)	11% ⊖	31%	58% ⊕	+47% ⊕
Greece (n=500)	21%	35%	44%	+24%	Greece (n=201)	14% ⊖	36%	50% ⊕	+36% ⊕
Spain (n=608)	20%	37%	44%	+24%	Spain (n=239)	14% ⊖	38%	48%	+34% ⊕
United Kingdom (n=926)	24%	32%	44%	+20%	United Kingdom (n=322)	20% ⊖	31%	49% ⊕	+29% ⊕
France (n=820)	26%	32%	42%	+15%	France (n=283)	20% ⊖	33%	47% ⊕	+28% ⊕
Netherlands (n=564)	26%	35%	38%	+12%	Netherlands (n=208)	19% ⊖	39%	42%	+23% ⊕
Germany (n=687)	30%	31%	39%	+9%	Germany (n=253)	22% ⊖	30%	47% ⊕	+25% ⊕
United States (n=916)	37%	27%	35%	-2%	United States (n=308)	26% ⊖	28%	45% ⊕	+19% ⊕

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?

Australia GTRP – December 2023

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

Impressions of Canada as a Holiday Destination

DESTINATION CANADA

■ Total Australia   ■ HVG Audience

Statement	Total Australia	HVG Audience
Has beautiful outdoor scenery and landscapes	70%	64% ⊖
Is a great place to see wildlife in its natural habitat	65%	59% ⊖
Is a place I would be proud to tell people I have visited	61%	58%
Offers activities that are physically challenging	59%	54% ⊖
Is a place to form lifelong memories	57%	54%
Has great outdoor activities I would participate in	56%	54%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	55%	52%
Is a place where I can get away from the stresses of everyday life	55%	55%
Is a place where I can experience things that I can't experience at home	54%	49% ⊖
Is a place where I can explore several different cities or regions in one trip	48%	49%
Its cities have a lot of great attractions to see and do	48%	43% ⊖
Is a place I want to visit with my family	46%	47%
Is a socially responsible travel destination	45%	44%
Is an environmentally-friendly travel destination	44%	46%

Statement	Total Australia	HVG Audience
Its cities have a great atmosphere	44%	43%
Is a place I want to visit with friends	42%	42%
Is a great place for holidays that avoid surprises	41%	44%
Has a culture that I would want to experience	40%	41%
Has transport options that make it easy for me to get to from where I live	39%	42%
Has great dining and food experiences	39%	38%
Is a great place for shopping and browsing through stores	36%	36%
Has appealing festivals and events	35%	35%
Has great historical or heritage sites and experiences	32%	34%
Has a great arts and music scene	31%	34%
Is a place trending as a must-visit spot	31%	33%
Offers good value for money	29%	34% ⊕

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) (n=1590); HVG (n=431)
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.

Australia GTRP – December 2023

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

DESTINATION CANADA

	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.

Australia GTRP – December 2023

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.

Australia GTRP – December 2023

Brand Value Statements for Canada

Legend: ■ Total Australia ■ HVG Audience

Statement	Total Australia	HVG Audience
Is a place with wide-open landscapes	70%	65% ⊖
Is a place where nature can be enjoyed in close proximity to cities	62%	58% ⊖
Is a place where the people are welcoming	60%	58%
Is a place that embraces cultural diversity	53%	52%
Is a place where the people are open-minded	53%	48% ⊖
Is a good place to live	51%	47% ⊖
Is a place where the people embrace new ideas	45%	46%
Has a distinctive identity that can't be replicated by other destinations	39%	41%

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) (n=1590); HVG (n=431)
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.

Australia GTRP – December 2023

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

Brand Value Statements: Among Total Australia

	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	🟩					🟥				🟩
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 — green   **Weakness** — pink

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.

Australia GTRP – December 2023

Brand Value Statements: Among HVG Audience

	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** 🟥

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.

Australia GTRP – December 2023

Destination Attributes: Drivers Analysis: Among Total Australia

☐ = Brand Value Statement

Attribute	Value
Is a place I want to visit with friends	7.88%
Is a place I want to visit with my family	7.35%
Is a place trending as a must-visit spot	6.44%
Offers good value for money	5.40%
Is a good place to live	4.76%
Has a culture that I would want to experience	4.64%
Has transport options that make it easy for me to get to from where I live	3.72%
Is a great place to see wildlife in its natural habitat	3.60%
Is a place where I can experience things that I can't experience at home	3.12%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	3.09%
Has great dining and food experiences	3.05%
Has great historical or heritage sites and experiences	2.88%
Is a great place for shopping and browsing through stores	2.86%
Its cities have a great atmosphere	2.70%
Is a great place for holidays that avoid surprises	2.67%
Is a socially responsible travel destination	2.66%
Has great outdoor activities I would participate in	2.64%
Is a place where I can explore several different cities or regions in one trip	2.41%
Is a place where I can get away from the stresses of everyday life	2.32%
Has a distinctive identity that can't be replicated by other destinations	2.15%
Offers activities that are physically challenging	2.15%
Is a place to form lifelong memories	2.13%
Is a place with wide-open landscapes	2.13%
Is an environmentally-friendly travel destination	2.12%
Its cities have a lot of great attractions to see and do	2.10%
Has appealing festivals and events	2.01%
Is a place I would be proud to tell people I have visited	1.99%
Has beautiful outdoor scenery and landscapes	1.79%
Is a place where the people are welcoming	1.79%
Is a place where nature can be enjoyed in close proximity to cities	1.63%
Is a place where the people are open-minded	1.52%
Is a place that embraces cultural diversity	1.50%
Has a great arts and music scene	1.48%
Is a place where the people embrace new ideas	1.47%

Description

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

Interpretation

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

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul 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: Drivers Analysis: Among HVG Audience

☐ = Brand Value Statement

Attribute	Value
Is a place I want to visit with friends	9.94%
Is a place trending as a must-visit spot	6.75%
Is a place I want to visit with my family	6.67%
Is a great place for holidays that avoid surprises	5.17%
Offers good value for money	4.50%
Has a culture that I would want to experience	3.90%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	3.80%
Is a great place to see wildlife in its natural habitat	3.62%
Is a good place to live	3.58%
Is a place with wide-open landscapes	3.42%
Has great outdoor activities I would participate in	3.22%
Has great historical or heritage sites and experiences	2.91%
Its cities have a great atmosphere	2.85%
Is a great place for shopping and browsing through stores	2.51%
Is a place where I can experience things that I can't experience at home	2.51%
Has appealing festivals and events	2.35%
Is a place where I can explore several different cities or regions in one trip	2.28%
Is a place where the people are welcoming	2.16%
Is a socially responsible travel destination	2.14%
Has transport options that make it easy for me to get to from where I live	2.02%
Is an environmentally-friendly travel destination	1.98%
Is a place that embraces cultural diversity	1.97%
Has beautiful outdoor scenery and landscapes	1.88%
Is a place where nature can be enjoyed in close proximity to cities	1.84%
Has great dining and food experiences	1.84%
Its cities have a lot of great attractions to see and do	1.77%
Is a place where the people are open-minded	1.76%
Is a place to form lifelong memories	1.75%
Has a great arts and music scene	1.74%
Is a place I would be proud to tell people I have visited	1.59%
Has a distinctive identity that can't be replicated by other destinations	1.56%
Is a place where I can get away from the stresses of everyday life	1.48%
Offers activities that are physically challenging	1.47%
Is a place where the people embrace new ideas	1.13%

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.

Australia GTRP – December 2023

Travel Intentions to Canada

Toronto
Ontario

Likelihood to Take a Holiday Trip to Canada (Next 2 Years)

1-3 Night Short Trip

% Top 2 box

16%	34% ➕

Total Australia	HVG Audience
8%	22% ➕
8%	
10%	13% ➕
	9%
75%	57% ➖

- ■ Definitely
- ■ Very likely
- ■ Somewhat likely
- ■ Not interested

4+ Nights Long Trip

% Top 2 box

30%	48% ➕

Total Australia	HVG Audience
15%	30% ➕
15%	
22%	18%
	19% ➖
48%	33% ➖
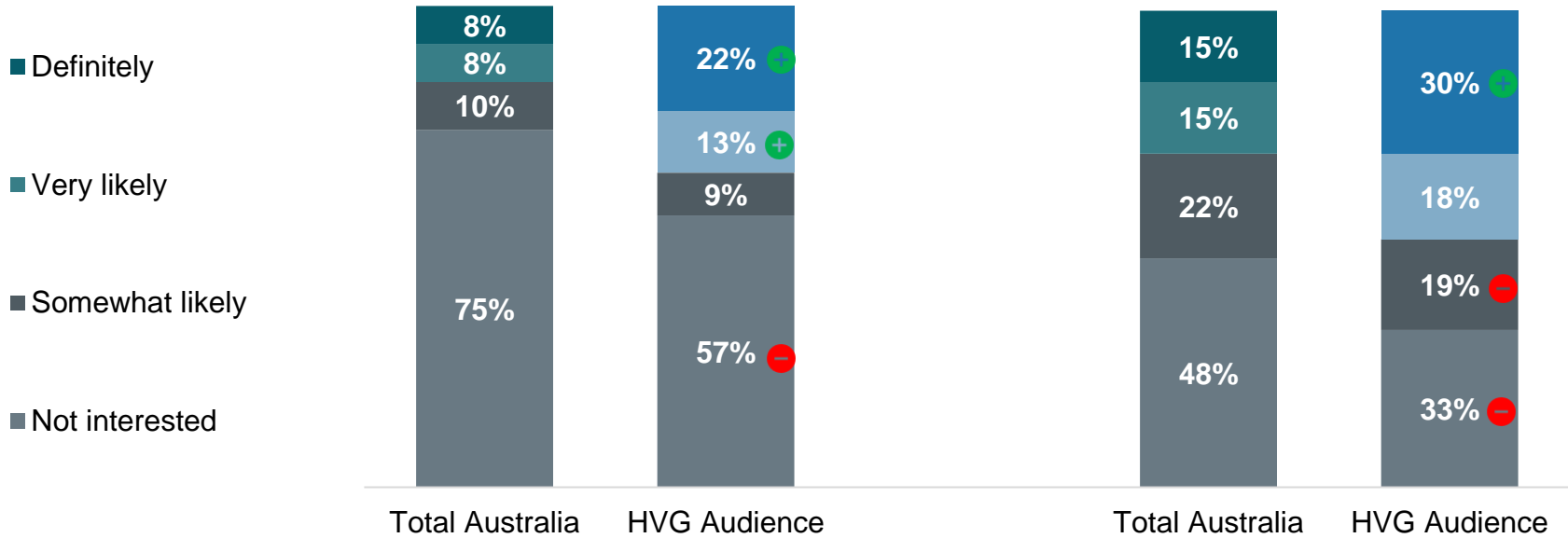
NET: Definitely/ Very Likely to visit Canada in the next 2 years

Total 33%
HVG 51% ➕

Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

Australia GTRP – December 2023

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

Canadian Destinations Likely to Visit

Total Australia

HVG Audience

Northwest Territories
9%	9%	
5%	6%	Yellowknife
3%	4%	Inuvik
2%	2%	Other – NWT

Nunavut
4%	4%	
3%	2%	Iqaluit
2%	1%	Other – NU

Quebec
38%	31% 🔴	
29%	25%	Montréal
26%	20% 🔴	Québec City
7%	7%	Mont Tremblant
4%	3%	Other – QC

Yukon
12%	10%	
7%	7%	Whitehorse
5%	6%	Dawson City
3%	2%	Other – YT

Newfoundland & Labrador
11%	14%	
7%	11% 🟢	St. John's
4%	5%	Other - NL

British Columbia
65%	62%	
35%	29% 🔴	Rocky Mountains
46%	40% 🔴	Vancouver
22%	24%	Victoria
25%	25%	Whistler
8%	11% 🟢	Okanagan
6%	5%	Other – BC

Prince Edward Island
10%	8%	
8%	7%	Charlottetown
3%	2%	Other - PEI

New Brunswick
8%	9%	
4%	6% 🟢	Fredericton
5%	8% 🟢	Saint John
2%	1%	Other - NB

Alberta
43%	41%	
26%	22% 🔴	Rocky Mountains
21%	20%	Calgary
12%	12%	Edmonton
21%	20%	Banff
16%	16%	Jasper
4%	4%	Other – AB

Nova Scotia
17%	15%	
12%	12%	Halifax
8%	10%	Cape Breton
3%	2%	Other - NS

Saskatchewan
14%	14%	
6%	10% 🟢	Regina
9%	11%	Saskatoon
2%	1%	Other – SK

Manitoba
14%	19% 🟢	
9%	14% 🟢	Winnipeg
7%	11% 🟢	Churchill
2%	2%	Other – MB

Ontario
58%	54% 🔴	
28%	28%	Ottawa
39%	33% 🔴	Niagara Falls
42%	39%	Toronto
6%	8%	Muskoka
3%	2%	Other – ON

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/very likely to take a trip to Canada (n=1136); HVG (n=333)
E2. If you were to take a vacation trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)
E4a-m. Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

Australia GTRP – December 2023

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

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

DESTINATION CANADA

Total Australia

HVG Audience

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)

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)

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)

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)

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)

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)

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)

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)

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)

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)

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/very 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)

Australia GTRP – December 2023

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

Barriers for Visiting Canada

Total Australia ■ **HVG Audience** ■

Barrier	Total Australia	HVG Audience
Cost	42%	32% ⊖
Too far / flight too long	28%	23% ⊖
There are other places I would rather visit	24%	21%
Extreme weather conditions	19%	18%
There is no reason to visit anytime soon	17%	16%
Poor weather	15%	15%
Not enough time to take a holiday	14%	11%
Poor value for money	14%	15%
Unfavourable conditions for driving during winter	11%	9%
Destinations and attractions too far apart	11%	13%
Safety concerns	11%	12%
Unable to take a holiday during months when I want to visit Canada	10%	10%
Visa requirements	10%	10%
Delays and hassles at airports and borders	9%	9%
Health risks	9%	10%
Has no iconic attractions I want to see	8%	9%
Too many crowds at the places I want to visit in Canada	6%	8% ⊕
Electronic Travel Authorization (eTA) requirements	5%	8% ⊕
Language barrier / don't speak my language	3%	5%
Nothing would prevent me from travelling to Canada	13%	14%

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

Australia GTRP – December 2023

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

Travel Behaviours

Churchill
Manitoba

Top 10 Activities Interested In & Trip Anchors

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 ⊖

Top 10 Trip Anchor Activities	
Total Australia (n=1577)	**HVG Audience** (n=429)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Historical, archaeological or world heritage sites
Historical, archaeological or world heritage sites	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) ⊖
Trying local food and drink	Trying local food and drink ⊖
Oceanside beaches	Nature walks
Northern lights	Northern lights ⊖
Nature walks	Oceanside beaches ⊖
Local markets (e.g. public markets, farmers market, night markets)	Cultural or traditional festivals ⊖
Food and drink festivals or events	Art galleries or museums
Cultural or traditional festivals	Viewing wildlife or marine life ⊖
Viewing wildlife or marine life	Food and drink festivals or events ⊖

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)
D5. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

Australia GTRP – December 2023

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

General Activities Interested In

Total Australia ■ **HVG Audience**

Activity	Total Australia	HVG Audience
Trying local food and drink	65%	52% −
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	62%	53% −
Nature walks	61%	52% −
Local markets (e.g. public markets, farmers market, night markets)	60%	48% −
Oceanside beaches	56%	45% −
Historical, archaeological or world heritage sites	52%	44% −
Viewing wildlife or marine life	48%	38% −
Nature parks	48%	41% −
Art galleries or museums	47%	40% −
Food and drink festivals or events	46%	39% −
Northern lights	46%	37% −
City green spaces like parks or gardens	45%	36% −
Cultural or traditional festivals	44%	35% −
Shopping for items that help me remember my trip	44%	36% −
Lakeside beaches	44%	37% −
Shopping for clothes and shoes	38%	36%
Autumn colours	38%	31% −
Exploring places most tourists won't go to	37%	33% −
Spring blossoms	37%	30% −

Activity	Total Australia	HVG Audience
Self-guided driving tours or road trips	36%	29% −
Learning about Indigenous culture, traditions or history	36%	30% −
Breweries or wineries	35%	28% −
Guided city tours	35%	29% −
Travelling to remote destinations	34%	31%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	34%	27% −
Hiking	33%	30%
Fine dining	33%	30%
Cruises	30%	28%
Winter festivals	30%	27%
Nightlife	30%	27%
Amusement or theme parks	30%	24% −
Guided nature tours	29%	24% −
Camping	28%	26%
Music festivals	26%	22% −
Wilderness lodges	26%	24%
Kayaking, canoeing or paddle boarding	26%	22%
Guided train tours	25%	22% −
Guided boat tours	25%	20%
Spa or wellness centres	25%	22%

Activity	Total Australia	HVG Audience
Culinary tours or cooking classes	24%	25%
Sporting events (to attend or participate)	22%	21%
Casual biking	19%	19%
Comedy festivals	18%	18%
Agricultural or country farm tours	17%	15%
Shopping for luxury items	17%	17%
Renting a recreational vehicle (RV)	17%	16%
Guided airplane or helicopter tours	17%	17%
Downhill skiing or snowboarding	15%	18%
Fishing or angling	15%	17%
Movie festivals	15%	14%
Mountain biking	14%	16%
Road cycling	13%	15%
Golfing	11%	15% +
Snowshoeing or cross country skiing	10%	12%
Rodeos	9%	9%
Hunting	9%	13% +
Heli-skiing	5%	6%

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1590); HVG (n=431)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

Australia GTRP – December 2023

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

Trip Anchor Activities

■ Total Australia ■ HVG Audience

Activity	Total Australia	HVG Audience
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	29%	23% ⊖
Historical, archaeological or world heritage sites	26%	24%
Trying local food and drink	24%	20% ⊖
Oceanside beaches	23%	16% ⊖
Northern lights	22%	16% ⊖
Nature walks	19%	16%
Local markets (e.g. public markets, farmers market, night markets)	17%	13% ⊖
Food and drink festivals or events	17%	13% ⊖
Cultural or traditional festivals	17%	13% ⊖
Viewing wildlife or marine life	16%	13% ⊖
Art galleries or museums	16%	13%
Nature parks	15%	12% ⊖
Cruises	14%	11% ⊖
Exploring places most tourists won't go to	13%	11%
Spring blossoms	13%	10% ⊖
Travelling to remote destinations	12%	11%
Autumn colours	12%	8% ⊖
Learning about Indigenous culture, traditions or history	12%	10%
Amusement or theme parks	11%	10%

Activity	Total Australia	HVG Audience
Lakeside beaches	11%	10%
Shopping for clothes and shoes	11%	11%
Self-guided driving tours or road trips	11%	10%
Music festivals	10%	8% ⊖
Camping	10%	8% ⊖
Hiking	10%	9%
Sporting events (to attend or participate)	10%	8%
Winter festivals	10%	8%
Shopping for items that help me remember my trip	10%	9%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	10%	8%
City green spaces like parks or gardens	9%	8%
Breweries or wineries	9%	6% ⊖
Guided city tours	8%	8%
Fine dining	8%	8%
Nightlife	8%	6%
Guided train tours	7%	5% ⊖
Guided nature tours	7%	5% ⊖
Spa or wellness centres	7%	7%
Wilderness lodges	7%	5%
Shopping for luxury items	6%	4%

Activity	Total Australia	HVG Audience
Fishing or angling	6%	7%
Kayaking, canoeing or paddle boarding	6%	5%
Downhill skiing or snowboarding	6%	7%
Culinary tours or cooking classes	5%	7%
Movie festivals	5%	5%
Renting a recreational vehicle (RV)	5%	4%
Comedy festivals	5%	5%
Guided boat tours	5%	3%
Agricultural or country farm tours	4%	3%
Road cycling	4%	5%
Mountain biking	4%	4%
Casual biking	3%	4%
Golfing	3%	5%
Guided airplane or helicopter tours	3%	4%
Hunting	3%	4% ⊕
Rodeos	3%	3%
Snowshoeing or cross country skiing	2%	3%
Heli-skiing	1%	2%

Base: Long-haul holiday travellers (past 3 years or next 2 years) Selected an activity (n=1577); HVG (n=429)
D5. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

Australia GTRP – December 2023

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

Priority of Sustainable Travel When Planning a Trip

DESTINATION CANADA

% Score 5 to 7 (out of 7)

56%	67% ⊕

Legend:
- ■ 7 - Essential priority
- ■ 6
- ■ 5
- ■ 4
- ■ 3
- ■ 2
- ■ 1 - Not a priority

Total Australia
- 13%
- 19%
- 23%
- 20%
- 8%
- 5%
- 12%

HVG Audience
- 18% ⊕
- 26% ⊕
- 24%
- 12% ⊖
- 6% ⊖
- 4%
- 11%

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'.

Australia GTRP – December 2023

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

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

Legend: ■ Total Australia   ■ HVG Audience

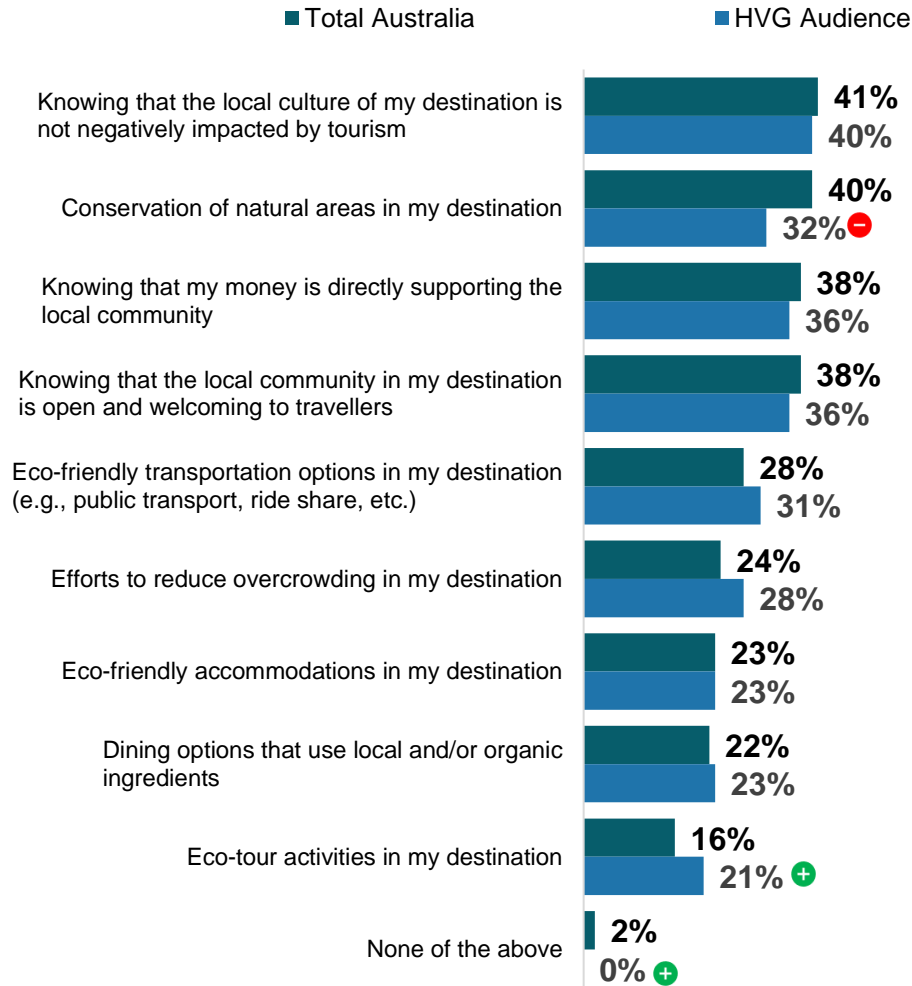| Sustainability Effort	Total Australia	HVG Audience
Knowing that the local culture of my destination is not negatively impacted by tourism	41%	40%
Conservation of natural areas in my destination	40%	32% ⊖
Knowing that my money is directly supporting the local community	38%	36%
Knowing that the local community in my destination is open and welcoming to travellers	38%	36%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	28%	31%
Efforts to reduce overcrowding in my destination	24%	28%
Eco-friendly accommodations in my destination	23%	23%
Dining options that use local and/or organic ingredients	22%	23%
Eco-tour activities in my destination	16%	21% ⊕
None of the above	2%	0% ⊕

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".

⊕ / ⊖ = significantly higher/lower result (vs. Total)
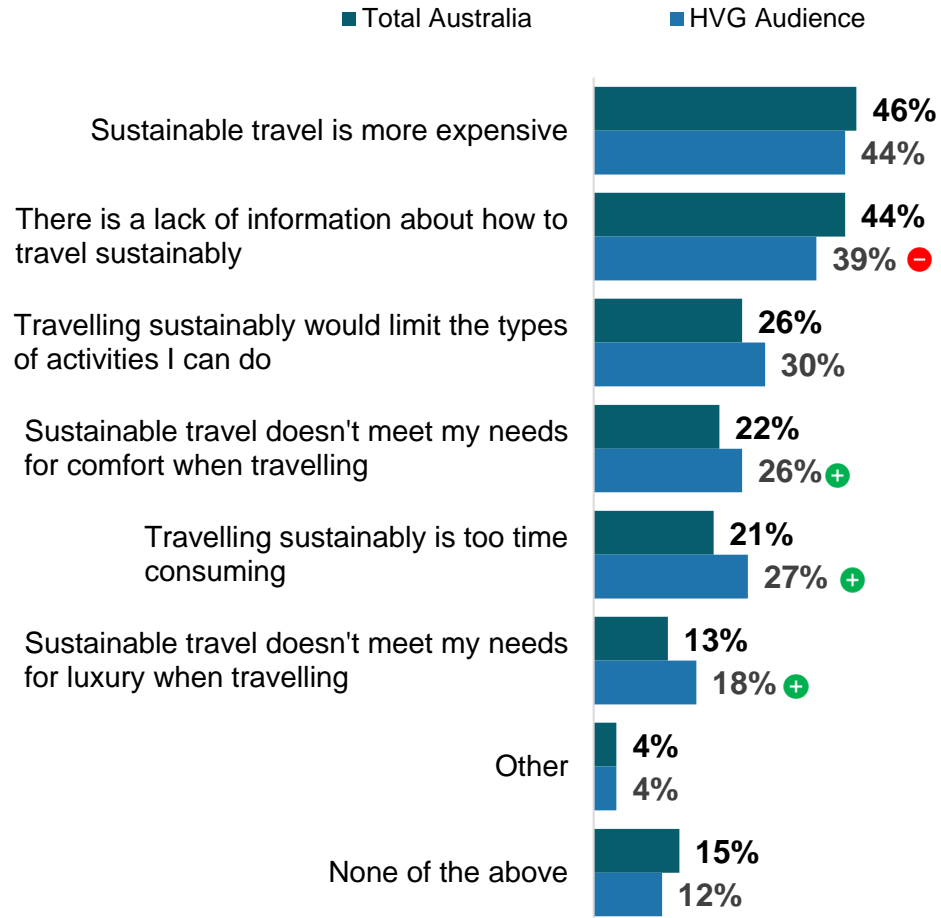
Barriers to Sustainable Travel

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".

- Total Australia
- HVG Audience

Barrier	Total Australia	HVG Audience
Sustainable travel is more expensive	46%	44%
There is a lack of information about how to travel sustainably	44%	39% −
Travelling sustainably would limit the types of activities I can do	26%	30%
Sustainable travel doesn't meet my needs for comfort when travelling	22%	26% +
Travelling sustainably is too time consuming	21%	27% +
Sustainable travel doesn't meet my needs for luxury when travelling	13%	18% +
Other	4%	4%
None of the above	15%	12%

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.

Australia GTRP – December 2023

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

Impact of Extreme Weather Events on Travel Plans

DESTINATION CANADA

% Top 2 box

67%	68%

- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not concerned at all

Total Australia
- 29% (Very concerned)
- 39% (Somewhat concerned)
- 24% (Not very concerned)
- 9% (Not concerned at all)

HVG Audience
- 40% ⊕ (Very concerned)
- 27% ⊖ (Somewhat concerned)
- 22% (Not very concerned)
- 10% (Not concerned at all)

% 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?

Australia GTRP – December 2023

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

Impact of International Conflicts & Unrest on Travel Plans

DESTINATION CANADA

% Top 2 box

	79%	82%

- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not concerned at all

Total Australia
- 36% Very concerned
- 43% Somewhat concerned
- 16% Not very concerned
- 5% Not concerned at all

HVG Audience
- 48% 🟢 Very concerned
- 35% 🔴 Somewhat concerned
- 15% Not very concerned

	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?

Australia GTRP – December 2023

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

Usage of AI Tools to Plan Trips

Legend:
- ■ Yes
- ■ No
- ■ Don't know

Total Australia
- 22%
- 75%
- 3%

HVG Audience
- 42% (+)
- 57% (−)

Australia GTRP – December 2023

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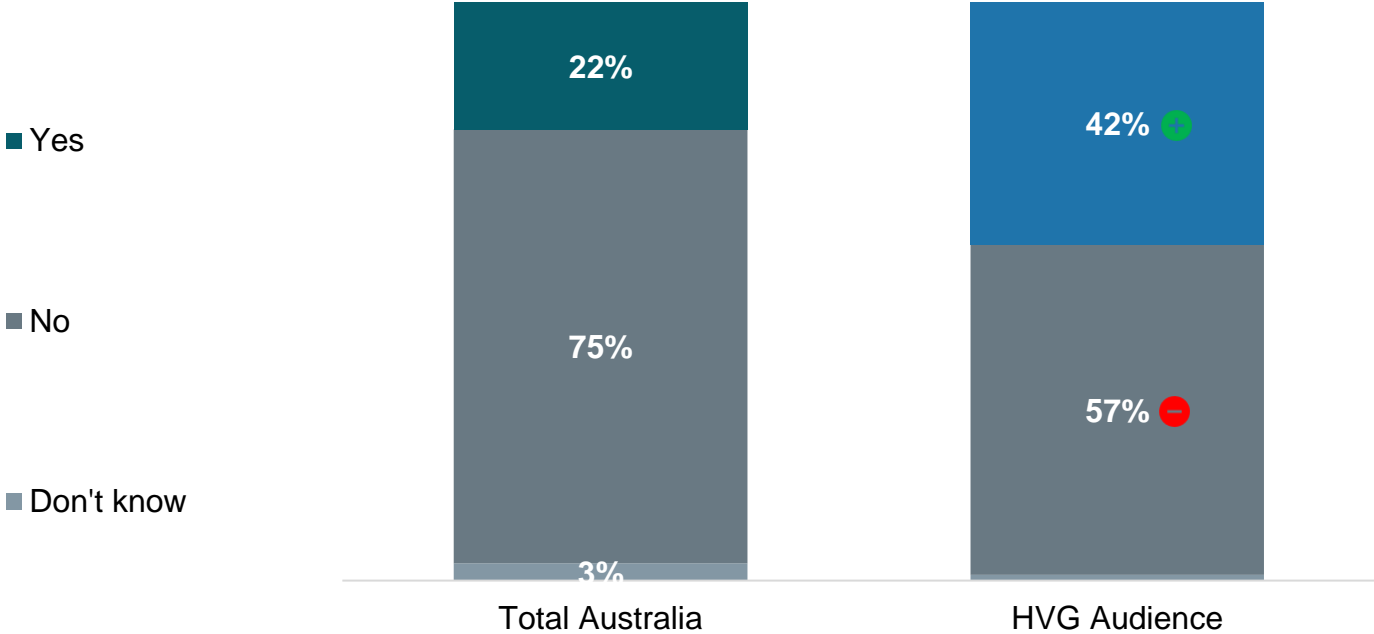
Seasonal Travel

Yellowknife
Northwest Territories

Preferred Time of Year for Holiday Trips

- Total Australia
- HVG Audience

December	27%
	21% ⊖
January	24%
	23%
February	18%
	24% ⊕
March	19%
	23% ⊕
April	21%
	22%
May	21%
	25% ⊕
June	26%
	27%
July	29%
	24% ⊖
August	26%
	27%
September	29%
	30%
October	25%
	23%
November	19%
	19%
Don't know	9%
	7% ⊖

	Total Australia	HVG Audience
Winter	43%	43%
Spring	39%	48% ⊕
Summer	47%	50%
Fall	46%	45%

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

Australia GTRP – December 2023

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

Interest in Winter Holidays

DESTINATION CANADA

% Extremely/somewhat interested (top 2 box)

63%	72% ➕

- ■ Extremely interested
- ■ Somewhat interested
- ■ Neutral
- ■ Not very interested
- ■ Not at all interested

Total Australia
- 30%
- 33%
- 18%
- 13%
- 7%

HVG Audience
- 45% ➕
- 27% ➖
- 12% ➖
- 10%
- 5%

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.

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

Australia GTRP – December 2023

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

Unaided Winter Destinations

DESTINATION CANADA

■ Total Australia   ■ HVG Audience

Destination	Total Australia	HVG Audience
Canada	28%	28%
Japan	27%	24%
New Zealand	19%	15% ⊖
United States	15%	14%
Switzerland	13%	11%
United Kingdom	12%	12%
Australia	8%	5%
Europe	7%	6%
France	5%	9% ⊕
Norway	4%	2%
Germany	3%	4%
South Korea	3%	2%
Iceland	3%	3%

Australia GTRP – December 2023

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

Motivators & Barriers for Winter Travel to Canada

DESTINATION CANADA

Motivators for Winter Travel

■ Total Australia (n=490)   ■ HVG Audience (n=166)

Motivator	Total Australia	HVG Audience
The weather is ideal at the places I want to visit during these months	37%	42%
There are specific activities I want to do in Canada that are available in these months	34%	37%
I am able to take a holiday during these months	33%	35%
There are places in Canada I'd only want to visit during these months	27%	26%
Travel prices are cheaper during these months	24%	30% ⊕
It's school holidays so I can enjoy a family trip	18%	21%
There are less crowds at the places I want to visit during these months	18%	21%
Don't know	6%	1% ⊖

Barriers for Winter Travel

■ Total Australia (n=646)   ■ HVG Audience (n=167)

Barrier	Total Australia	HVG Audience
The weather is too cold at the places I want to visit during these months	42%	39%
Travel prices are more expensive during these months	20%	21%
There are other places I'd rather visit during these months	16%	20%
I am unable to take a holiday during these months	13%	11%
The activities I want to do are not available in these months	12%	15%
I don't know enough about what activities are available during these months	10%	8%
There are too many crowds at the places I want to visit during these months	9%	11%
Nothing would prevent me from travelling to Canada during these months	23%	19%

Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>considering</u> 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 <u>not considering</u> 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**?

Australia GTRP – December 2023

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

Interest in Winter Activities in Canada

% Somewhat/Very interested

■ Total Australia   ■ HVG Audience

Activity	Total Australia	HVG Audience
Northern lights	89%	85% ⊖
City sightseeing and experiences (e.g. city tours, markets, snowy streets)	86%	85%
Culinary or dining experiences	80%	80%
Cultural attractions (e.g. art galleries, museums)	77%	77%
Winter festivals and events	77%	77%
Learning about Indigenous culture, traditions or history	72%	75%
Wilderness lodges	70%	73%
Spas	59%	65% ⊕
Dog sledding	56%	64% ⊕
Ice skating	53%	62% ⊕
Downhill skiing or Snowboarding	50%	61% ⊕
Cross-country skiing or snowshoeing	41%	54% ⊕
Heli-skiing	35%	50% ⊕

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**?

Australia GTRP – December 2023

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

Interest in Fall Holidays

% Extremely/somewhat interested (top 2 box)

75%	80% ⊕

- ■ Extremely interested
- ■ Somewhat interested
- ■ Neutral
- ■ Not very interested
- ■ Not at all interested

Total Australia
- 34%
- 41%
- 20%
- 4%

HVG Audience
- 45% ⊕
- 35% ⊖
- 17%
- 3%

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.

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

Australia GTRP – December 2023

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

Unaided Fall Destinations

■ Total Australia ■ HVG Audience

Destination	Total Australia	HVG Audience
Japan	25%	24%
United States	18%	19%
Canada	17%	21%
United Kingdom	12%	13%
Australia	9%	7%
New Zealand	8%	7%
Europe	7%	6%
Italy	7%	3% ⊖
France	5%	6%
Indonesia	4%	5%
Germany	4%	6% ⊕
South Korea	4%	3%
Spain	3%	4%
Thailand	3%	3%
Bali	3%	3%
Greece	3%	2%
Tasmania	3%	1%

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.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=779); HVG (n=212)
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.

Australia GTRP – December 2023

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

Motivators & Barriers for Fall Travel to Canada

Motivators for Fall Travel

■ Total Australia (n=580) **■ HVG Audience** (n=181)

The weather is ideal at the places I want to visit during these months
- Total Australia: **50%**
- HVG Audience: **54%**

I am able to take a holiday during these months
- Total Australia: **39%**
- HVG Audience: **44%**

There are less crowds at the places I want to visit during these months
- Total Australia: **31%**
- HVG Audience: **34%**

There are places in Canada I'd only want to visit during these months
- Total Australia: **24%**
- HVG Audience: **26%**

There are specific activities I want to do in Canada that are available in these months
- Total Australia: **24%**
- HVG Audience: **33%** ➕

Don't know
- Total Australia: **7%**
- HVG Audience: **2%** ➖

Barriers for Fall Travel

■ Total Australia (n=556) **■ HVG Audience** (n=152)

The weather is not ideal at the places I want to visit during these months
- Total Australia: **20%**
- HVG Audience: **23%**

I am unable to take a holiday during these months
- Total Australia: **19%**
- HVG Audience: **18%**

I don't know enough about what activities are available during these months
- Total Australia: **16%**
- HVG Audience: **12%**

Travel prices are more expensive during these months
- Total Australia: **16%**
- HVG Audience: **18%**

There are other places I'd rather visit during these months
- Total Australia: **15%**
- HVG Audience: **18%**

The activities I want to do are not available in these months
- Total Australia: **11%**
- HVG Audience: **17%** ➕

There are too many crowds at the places I want to visit during these months
- Total Australia: **9%**
- HVG Audience: **14%** ➕

Nothing would prevent me from travelling to Canada during these months
- Total Australia: **28%**
- HVG Audience: **21%** ➖

Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>considering</u> 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**?
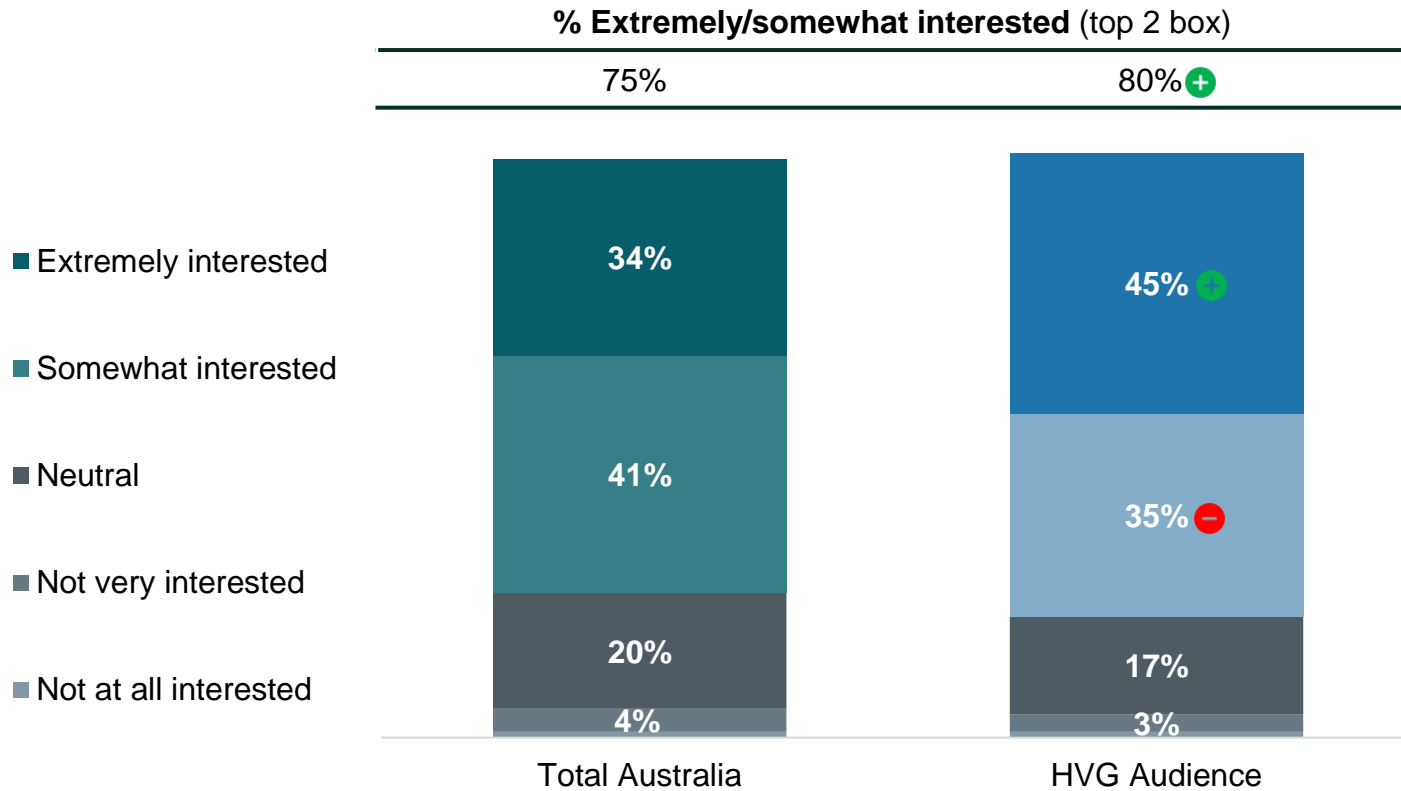Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>not considering</u> visiting Canada or any province/territory in September, October or November
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October 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**?

Australia GTRP – December 2023

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

Interest in Fall Activities in Canada

% Somewhat/Very interested

■ Total Australia ■ HVG Audience

Activity	Total Australia	HVG Audience
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	89%	87%
City sightseeing and experiences (e.g. city tours, markets)	88%	88%
Northern lights	88%	82% ⊖
Wildlife viewing (e.g. bears, moose, birds)	85%	84%
Autumn colours	83%	80%
Polar bear viewing	83%	82%
Culinary or dining experiences	82%	80%
Cultural attractions (e.g. art galleries, museums)	79%	77%
Hiking or walking in nature	77%	78%
Train journeys	77%	75%
Whale watching	75%	75%
Learning about Indigenous culture, traditions or history	73%	76%
Self-guided driving tours or road trips	73%	78% ⊕
Wilderness lodges	72%	72%
Spas	61%	66% ⊕
Fishing or angling	44%	57% ⊕
Mountain biking	42%	57% ⊕

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**?

Australia GTRP – December 2023

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

Indigenous Tourism

Unaided Mentions – Indigenous Cultural & Tourism Activities

Total Australia ■ **HVG Audience** ■

Category	Total Australia	HVG Audience
Indigenous People & their culture	26%	31% ⊕
Exploring tourist places/attractions	11%	11%
Historical buildings/ churches	9%	8%
Learning/ Gaining Knowledge	9%	6% ⊖
Various art and craft work/Aborginal art	7%	6%
Food & Drinks	6%	5%
Eco tourism/Natural environment	5%	5%
Visiting Villages/Local people	5%	5%
Uluru / Ayers Rock	4%	2% ⊖
Australia	3%	3%
Ceremonies and festivals	3%	6% ⊕
Interesting/Fun/Entertaining	3%	6% ⊕
Music events/ Shows/ Events	3%	3%

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.

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**?

Australia GTRP – December 2023

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

Unaided Indigenous Tourism Destinations

■Total Australia   ■HVG Audience

Destination	Total Australia	HVG Audience
Australia	43%	29% ⊖
New Zealand	14%	12%
Canada	10%	10%
United States	9%	10%
South America	4%	3%
Central America	3%	3%
Fiji	3%	2%

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.

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

Australia GTRP – December 2023

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

Interest in Indigenous Cultural & Tourism Activities

DESTINATION CANADA

% Somewhat/Very interested

■ Total Australia   ■ HVG Audience

Activity	Total Australia	HVG Audience
Experiencing Indigenous food and drink	77%	78%
Indigenous adventure or excursions in nature (kayak, heritage parks, northern lights, etc.)	76%	79%
Visiting a museum, interpretation center or traditional Indigenous site	76%	78%
Learning about Indigenous ways of life by visiting an Indigenous community	73%	77% ➕
Learning about Indigenous ways of life through storytelling or connecting with Indigenous Elders	72%	76% ➕
Attending an Indigenous Pow Wow, festival, event, or performance	70%	75% ➕
Visiting an Indigenous boutique or art/craft exhibition	69%	72%
Visiting remote northern Indigenous communities	68%	76% ➕
Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)	67%	73% ➕
Learning about residential schools and reconciliation with Indigenous peoples	61%	72% ➕
Hunting and fishing activity with an Indigenous outfitter	50%	61% ➕

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?

Australia GTRP – December 2023

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

Most Recent Trip

Lake Louise
Alberta

Main Purpose of Recent Trip

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

- Total travellers (n=706)
- Total HVG travellers (n=315)

Purpose	Total travellers	HVG travellers
Holiday	50%	39% ⊖
Visit family and friends	23%	22%
Combined business / personal reasons	18%	29% ⊕
Personal event (e.g., wedding, funeral)	5%	5%
Education	3%	3%
Other	1%	2%

Total Travellers to Any Destination vs. Total Travellers to Canada

- Total travellers (n=706)
- Travellers to Canada (n=199)

Purpose	Total travellers	Travellers to Canada
Holiday	50%	38% ⊖
Visit family and friends	23%	17% ⊖
Combined business / personal reasons	18%	37% ⊕
Personal event (e.g., wedding, funeral)	5%	4%
Education	3%	1%
Other	1%	2%

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

Australia GTRP – December 2023

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

Factors in Choosing Destination for Recent Trip

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

■ Total travellers (n=348)   ■ Total HVG travellers (n=123)   **■ Total travellers (n=348)   ■ Travellers to Canada (n=76)**

Factor	Total travellers	HVG travellers		Total travellers	Travellers to Canada
It was somewhere I always wanted to visit	40%	41%		40%	31%
It was a safe place to visit	36%	40%		36%	39%
Offered city experiences I am interested in	36%	33%		36%	28%
Offered cultural experiences I am interested in	30%	31%		30%	13% ⊖
Had visited before and wanted to return	29%	29%		29%	27%
Opportunity to relax, unwind, and decompress	29%	34%		29%	32%
It fit my travel budget	25%	21%		25%	27%
Saw a great deal	25%	23%		25%	24%
I wanted to visit with my friends or family	21%	17%		21%	21%
Offered culinary activities I am interested in (e.g. food or winery tour)	20%	17%		20%	14%
Offered outdoor experiences I am interested in	20%	17%		20%	17%
Was a place where I could gain a new perspective on my world	20%	22%		20%	13%
My friends or family recommended it	19%	15%		19%	19%
Offered travel activities I am interested in (e.g. cruise, train, or caravan trips)	19%	19%		19%	23%
Was a great family destination	18%	14%		18%	16%
Saw a great trip itinerary	15%	12%		15%	11%
Was a place where I could pursue my personal passions	15%	13%		15%	12%
Offered sports or outdoor activities I wanted to do (e.g. ski, golf)	11%	8%		11%	15%
Is a destination that offers socially responsible travel options that support the local community	10%	11%		10%	18% ⊕
Saw it on a television program or movie	10%	9%		10%	13%
Was recommended by a travel agent or tour operator	9%	7%		9%	13%
Was a destination that offered eco-friendly travel activities	8%	10%		8%	8%

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination, Took a holiday (n=348); HVG (n=123); Travellers to Canada (n=76)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

Australia GTRP – December 2023

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

Nights Spent During Recent Trip

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)
F4. How many nights did you spend in this destination?

Australia GTRP – December 2023

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

Amount Spent for Recent Trip

DESTINATION CANADA

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

■ Total travellers (n=706)   ■ Total HVG travellers (n=315)

	Total travellers	HVG travellers
Under $600	1%	0% ⊖
$601 to $1,200	2%	2%
$1,201 to $1,800	3%	2% ⊖
$1,801 to $2,400	6%	5%
$2,401 to $3,500	8%	5% ⊖
$3,501 to $4,500	10%	11%
$4,501 to $6,000	22%	26% ⊕
$6,001 to $8,000	15%	16%
$8,001 to $11,500	13%	13%
$11,501 to $17,500	11%	13%
Over $17,500	9%	7%
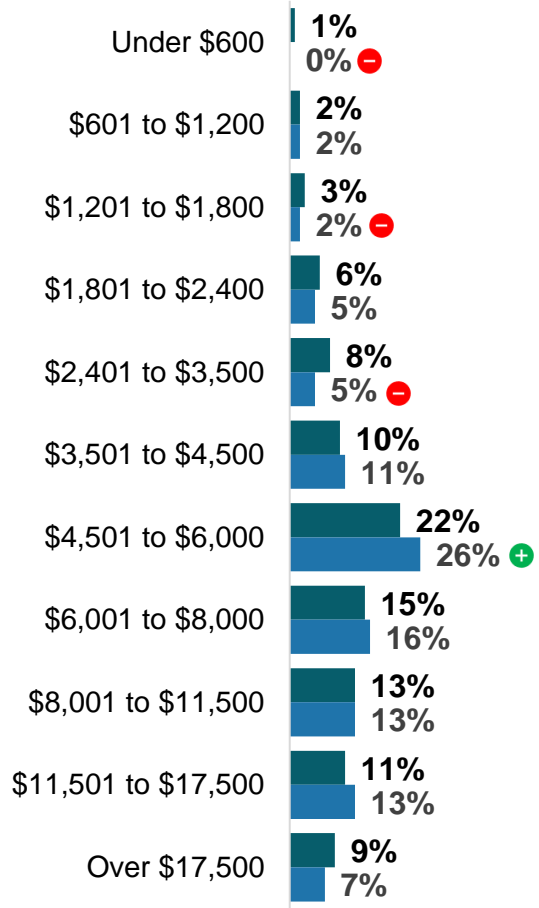
Average Spent
Total: $8,034 AUD
HVG: $8,041 AUD

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=706)   ■ Travellers to Canada (n=199)

	Total travellers	Travellers to Canada
Under $600	1%	1%
$601 to $1,200	2%	2%
$1,201 to $1,800	3%	1%
$1,801 to $2,400	6%	8%
$2,401 to $3,500	8%	11%
$3,501 to $4,500	10%	15% ⊕
$4,501 to $6,000	22%	28% ⊕
$6,001 to $8,000	15%	16%
$8,001 to $11,500	13%	9% ⊖
$11,501 to $17,500	11%	5% ⊖
Over $17,500	9%	5% ⊖

Average Spent
Total: $8,034 AUD
Canada: $6,464 AUD ⊖

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)
F6. Overall how much did you spend on this trip? Consider the primary transportation to and from the destination, accommodation, dining, activities, shopping, and any other expenses.

Australia GTRP – December 2023

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

Payment Methods for Recent Trip

DESTINATION CANADA

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

■ Total travellers (n=706)　■ Total HVG travellers (n=315)

Credit card	27% / 28%
Debit or bank card	31% / 27%
Cash	22% / 20%
Mobile Payment	15% / 19%
Other	5% / 5%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=706)　■ Travellers to Canada (n=199)

Credit card	27% / 22%
Debit or bank card	31% / 31%
Cash	22% / 19%
Mobile Payment	15% / 22%
Other	5% / 6%

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)
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

Australia GTRP – December 2023

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

Travel Agents/Tour Operator Usage For Recent Trip

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

■ Total travellers (n=342)   ■ Total HVG travellers (n=184)

	Total travellers	HVG travellers
Booking flights	55%	43% ⊖
Booking accommodations	41%	36% ⊖
Researching flights	41%	35% ⊖
Researching accommodations	37%	38%
Booking activities to see and do	35%	36%
Booking ground transportation	33%	29%
Researching activities to see and do	30%	33%
Researching potential travel destinations	28%	32% ⊕
Researching ground transportation	27%	30%

% Used a travel agent
Total: 49%
HVG: 58% ⊕

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=342)   ■ Travellers to Canada (n=132)

	Total travellers	Travellers to Canada
Booking flights	55%	43% ⊖
Booking accommodations	41%	31% ⊖
Researching flights	41%	38%
Researching accommodations	37%	41%
Booking activities to see and do	35%	32%
Booking ground transportation	33%	26% ⊖
Researching activities to see and do	30%	29%
Researching potential travel destinations	28%	29%
Researching ground transportation	27%	32%

% 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?

Australia GTRP – December 2023

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

Organized Group Tour Usage For Recent Trip

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

- ■ Total travellers (n=706)
- ■ Total HVG travellers (n=315)

Yes, my whole trip was part of an organized group tour
- 32%
- 43% ⊕

Yes, a portion of my trip was part of an organized group tour
- 13%
- 13%

No
- 55%
- 44% ⊖

Total Travellers to Any Destination vs. Total Travellers to Canada

- ■ Total travellers (n=706)
- ■ Travellers to Canada (n=199)

Yes, my whole trip was part of an organized group tour
- 32%
- 54% ⊕

Yes, a portion of my trip was part of an organized group tour
- 13%
- 12%

No
- 55%
- 34% ⊖

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)
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

Australia GTRP – December 2023

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

Booking Flights For Recent Trip

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

■ Total travellers (n=706)　　■ Total HVG travellers (n=315)

Travel agent/tour operator (NET)	**49%** / 54% +
Booked online with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	**27%** / 32% +
Booked in-person with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	**25%** / 29% +
Booked on the phone with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	**17%** / 24% +
Booked directly with the airline(s)	**37%** / 40%
Booked online through an online booking engine (e.g. Expedia or Webjet)	**35%** / 38%
Booked by someone else in the travel party	**6%** / 7%
Other	**2%** / 1%
Did not need to book any flights	**1%** / 1%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=706)　　■ Travellers to Canada (n=199)

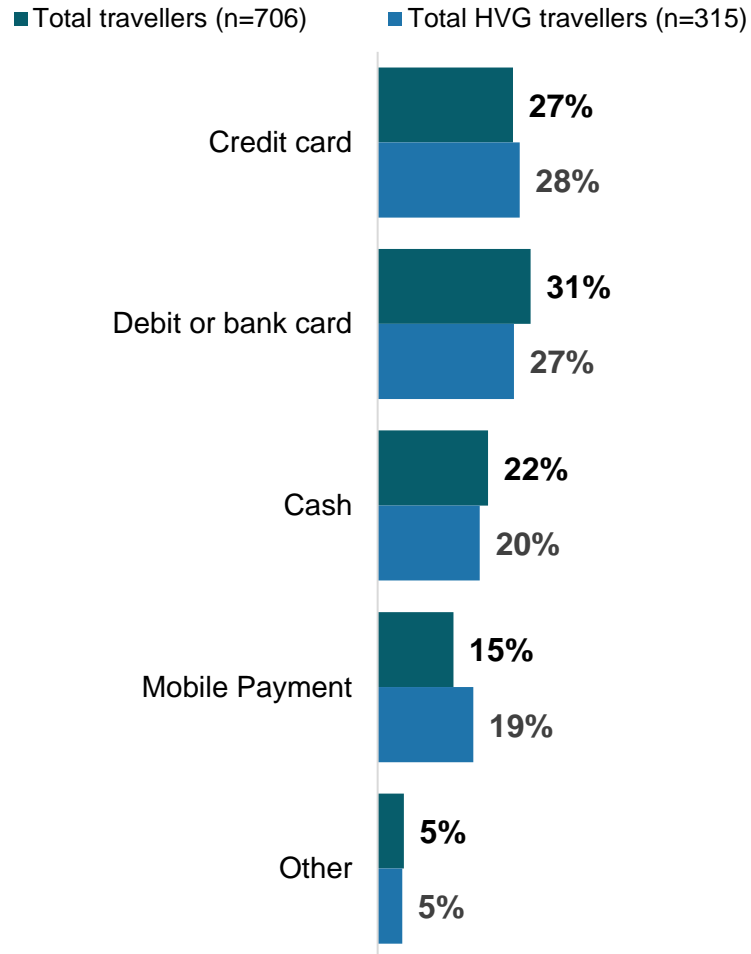|	
Travel agent/tour operator (NET)	**49%** / 63% +
Booked online with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	**27%** / 37% +
Booked in-person with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	**25%** / 36%
Booked on the phone with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	**17%** / 28% +
Booked directly with the airline(s)	**37%** + / 33%
Booked online through an online booking engine (e.g. Expedia or Webjet)	**35%** / 50% +
Booked by someone else in the travel party	**6%** / 9% +
Other	**2%** / 1%
Did not need to book any flights	**1%** / 0%

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)

Australia GTRP – December 2023

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

Booking Accommodations For Recent Trip

DESTINATION CANADA

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

■ Total travellers (n=706)　■ Total HVG travellers (n=315)

Category	Total	HVG
Travel agent/tour operator (NET)	39%	46% ⊕
Booked online with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	20%	24% ⊕
Booked in-person with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	18%	23% ⊕
Booked on the phone with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	15%	20% ⊕
Booked online through an online booking engine (e.g. Expedia or Webjet)	39%	40%
Booked directly with the lodging/accommodation establishment	28%	29%
Booked through accommodation sharing services website (e.g. Airbnb)	24%	27%
Booked through a visitors information centre at the destination	11%	15% ⊕
Booked by someone else in the travel party	6%	5%
Other	2%	1%
Did not need to book any accommodation	8%	7%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=706)　■ Travellers to Canada (n=199)

Category	Total	Canada
Travel agent/tour operator (NET)	39%	60% ⊕
Booked online with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	20%	33% ⊕
Booked in-person with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	18%	29% ⊕
Booked on the phone with a travel agent/tour operator (e.g. Flight Centre or Intrepid Travel)	15%	26% ⊕
Booked online through an online booking engine (e.g. Expedia or Webjet)	39%	46% ⊕
Booked directly with the lodging/accommodation establishment	28%	30%
Booked through accommodation sharing services website (e.g. Airbnb)	24%	26%
Booked through a visitors information centre at the destination	11%	20% ⊕
Booked by someone else in the travel party	6%	10% ⊕
Other	2%	1% ⊖
Did not need to book any accommodation	8%	5% ⊖

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)

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

Type of Accommodations For Recent Trip

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

- Total travellers (n=648)
- Total HVG travellers (n=294)

Accommodation	Total travellers	Total HVG travellers
Mid-priced hotel / motel	39%	37%
Rented house, apartment or condominium (e.g., Airbnb)	26%	23%
Luxury hotel	25%	26%
Budget hotel / motel	23%	20%
Home of friends or relatives	19%	18%
Bed & Breakfast (B&B)	17%	19%
All-inclusive resort	12%	16% ⊕
Hostel, university or school dormitory	12%	14%
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	11%	14%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	9%	13% ⊕
Own cottage or second home	9%	15% ⊕
Camping or trailer park	8%	9%
Guest ranch, farm, or lodge	7%	8%
Other	2%	0% ⊖

Total Travellers to Any Destination vs. Total Travellers to Canada

- Total travellers (n=648)
- Travellers to Canada (n=189)

Accommodation	Total travellers	Travellers to Canada
Mid-priced hotel / motel	39%	30% ⊖
Rented house, apartment or condominium (e.g., Airbnb)	26%	25%
Luxury hotel	25%	29%
Budget hotel / motel	23%	25%
Home of friends or relatives	19%	21%
Bed & Breakfast (B&B)	17%	19%
All-inclusive resort	12%	20% ⊕
Hostel, university or school dormitory	12%	18% ⊕
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	11%	17% ⊕
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	9%	16% ⊕
Own cottage or second home	9%	14% ⊕
Camping or trailer park	8%	16% ⊕
Guest ranch, farm, or lodge	7%	11% ⊕
Other	2%	1%

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation (n=648); HVG (n=294); Travellers to Canada (n=189)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

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

Time of Year Travelled for Recent Trip

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

■ Total travellers (n=706)   ■ Total HVG travellers (n=315)

Month	Total	HVG
December	11%	8% ⊖
January	10%	11%
February	9%	13% ⊕
March	9%	11%
April	12%	13%
May	14%	15%
June	17%	16%
July	15%	11% ⊖
August	13%	14%
September	17%	15%
October	10%	9%
November	10%	8%

Season	Total Travellers	HVG Travellers
Winter	23%	25%
Spring	26%	28%
Summer	36%	36%
Fall	30%	27%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=706)   ■ Travellers to Canada (n=199)

Month	Total	Canada
December	11%	8%
January	10%	7%
February	9%	8%
March	9%	9%
April	12%	11%
May	14%	15%
June	17%	16%
July	15%	17%
August	13%	12%
September	17%	17%
October	10%	8%
November	10%	11%

Season	Total Travellers	Travellers to Canada
Winter	23%	19%
Spring	26%	27%
Summer	36%	37%
Fall	30%	30%

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)
F15. Which time of the year did you take this trip? (Select all that apply)

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

Most Recent Trip to Canada

Niagara Falls
Ontario

Top 10 Activities Participated in During Recent Trip to Canada

Total Travellers (n=199)	Total HVG Travellers (n=120)
Nature walks	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Nature walks
City green spaces like parks or gardens	City green spaces like parks or gardens
Shopping for clothes and shoes	Nature parks
Nature parks	Camping
Trying local food and drink	Shopping for clothes and shoes
Camping	Road cycling
Local markets (e.g. public markets, farmers market, night markets)	Historical, archaeological or world heritage sites
Hiking	Trying local food and drink
Road cycling	Local markets (e.g. public markets, farmers market, night markets)

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to Canada (n=199); HVG (n=120)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

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

Activities Participated in During Recent Trip to Canada

Legend: ■ Total Travellers ■ Total HVG Travellers

Activity	Total Travellers	Total HVG Travellers
Nature walks	39%	34%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	36%	37%
City green spaces like parks or gardens	33%	28%
Shopping for clothes and shoes	28%	26%
Nature parks	27%	28%
Trying local food and drink	27%	25%
Camping	26%	26%
Local markets (e.g. public markets, farmers market, night markets)	25%	25%
Hiking	24%	23%
Road cycling	23%	26%
Art galleries or museums	22%	18%
Shopping for items that help me remember my trip	22%	20%
Historical, archaeological or world heritage sites	22%	25%
Food and drink festivals or events	21%	23%
Viewing wildlife or marine life	21%	13% ⊖
Travelling to remote destinations	21%	20%
Shopping for luxury items	20%	19%
Nightlife	20%	18%
Fine dining	19%	21%

Activity	Total Travellers	Total HVG Travellers
Guided city tours	19%	16%
Comedy festivals	19%	21%
Autumn colours	19%	19%
Music festivals	18%	19%
Exploring places most tourists won't go to	18%	17%
Lakeside beaches	18%	24% ⊕
Cultural or traditional festivals	18%	19%
Oceanside beaches	18%	23% ⊕
Sporting events (to attend or participate)	18%	21%
Hunting	17%	20%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	17%	19%
Mountain biking	17%	20%
Culinary tours or cooking classes	17%	17%
Fishing or angling	16%	19%
Amusement or theme parks	15%	17%
Breweries or wineries	15%	19%
Guided nature tours	15%	14%
Kayaking, canoeing or paddle boarding	15%	19%
Winter festivals	15%	14%
Learning about Indigenous culture, traditions or history	14%	11%

Activity	Total Travellers	Total HVG Travellers
Guided boat tours	14%	15%
Golfing	14%	15%
Movie festivals	14%	12%
Downhill skiing or snowboarding	14%	15%
Guided train tours	13%	15%
Spa or wellness centres	13%	12%
Guided airplane or helicopter tours	12%	11%
Spring blossoms	12%	12%
Heli-skiing	12%	11%
Cruises	12%	8% ⊖
Casual biking	12%	12%
Self-guided driving tours or road trips	11%	14%
Renting a recreational vehicle (RV)	11%	7% ⊖
Wilderness lodges	11%	12%
Snowshoeing or cross country skiing	11%	11%
Northern lights	10%	8%
Agricultural or country farm tours	9%	12%
Rodeos	8%	4% ⊖

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to Canada (n=199); HVG (n=120)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

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

Canadian Destinations Visited During Recent Trip

DESTINATION CANADA

Total Travellers

Total HVG Travellers

Northwest Territories
4%	3%	
3%	2%	Yellowknife
1%	2%	Inuvik
1%	1%	Other – NWT

Nunavut
1%	1%	
1%	1%	Iqaluit
-	-	Other – NU

Quebec
27%	24%	
16%	14%	Montréal
21%	17%	Québec City
12%	12%	Mont Tremblant
2%	2%	Other – QC

Yukon
6%	4%	
5%	3%	Whitehorse
3%	3%	Dawson City
1%	-	Other – YT

Newfoundland & Labrador
9%	7%	
7%	6%	St. John's
2%	2%	Other - NL

Prince Edward Island
9%	6%	
9%	6%	Charlottetown
-	-	Other - PEI

British Columbia
47%	50%	
24%	26%	Rocky Mountains
25%	23%	Vancouver
26%	27%	Victoria
19%	24% +	Whistler
14%	16%	Okanagan
4%	2%	Other – BC

New Brunswick
13%	14%	
11%	13%	Fredericton
12%	13%	Saint John
-	-	Other - NB

Alberta
27%	24%	
17%	19%	Rocky Mountains
11%	9%	Calgary
11%	12%	Edmonton
13%	12%	Banff
11%	9%	Jasper
3%	3%	Other – AB

Nova Scotia
16%	20%	
13%	18% +	Halifax
13%	17% +	Cape Breton
1%	1%	Other - NS

Saskatchewan
22%	23%	
15%	18%	Regina
16%	20%	Saskatoon
3%	2%	Other – SK

Manitoba
20%	24%	
16%	19%	Winnipeg
16%	20%	Churchill
-	-	Other – MB

Ontario
40%	44%	
25%	30%	Ottawa
17%	21%	Niagara Falls
32%	35%	Toronto
12%	18% +	Muskoka
2%	2%	Other – ON

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to Canada (n=199); HVG (n=120)
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

Australia GTRP – December 2023

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

Number of Visits Ever & Time of Year Visited Canada

Number of Visits Ever (Total Travellers vs Total HVG Travellers)

- 1 time: 39% / 30% ⊖
- 2 times: 28% / 34% ⊕
- 3+ times: 33% / 36%

Time of Year Visited (Total Travellers / Total HVG Travellers)

- December: 16% / 14%
- January: 16% / 14%
- February: 17% / 22% ⊕
- March: 16% / 20% ⊕
- April: 16% / 19% ⊕
- May: 17% / 18%
- June: 21% / 23%
- July: 24% / 25%
- August: 21% / 19%
- September: 23% / 17% ⊖
- October: 13% / 9% ⊖
- November: 13% / 13%

	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)

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

Demographics

	All Long-haul Travellers (n=1590)	HVG Audience (n=431)
Gender		
Male	53%	62% ➕
Female	47%	38% ➖
Age		
18 to 34	39%	37%
35 to 54	36%	44% ➕
55 or older	25%	20% ➖
Children in household under the age of 18		
Yes	44%	54% ➕
Employed		
Yes	74%	83% ➕
Identify as LGBTQ+		
Yes	11%	13%
Household Income (Annually)		
Under $50K	14%	5% ➖
$50K to $99K	28%	5% ➖
$100K or more	46%	88% ➕

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

THANK YOU

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

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