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China GTRP – December 2023

Kananaskis Country
Alberta

Study Overview: China Market

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

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn ¥30,001+ household income per month or are retired.

Timing of Fieldwork

December 11th – 23rd 2023

Geographical Definition for Qualified Trips

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

Sample Distribution

Sample distribution: **National**

High Value Guest (HVG) Audience: **828**

Other travellers: **1376**

Total sample size: **2204**

- 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 China market.

Market Sizing

Incidence of Long-Haul Pleasure Travel
(General Population within 11 target cities*)

13%

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

Plan to Take Long-Haul Pleasure Trip in Next 2 Years
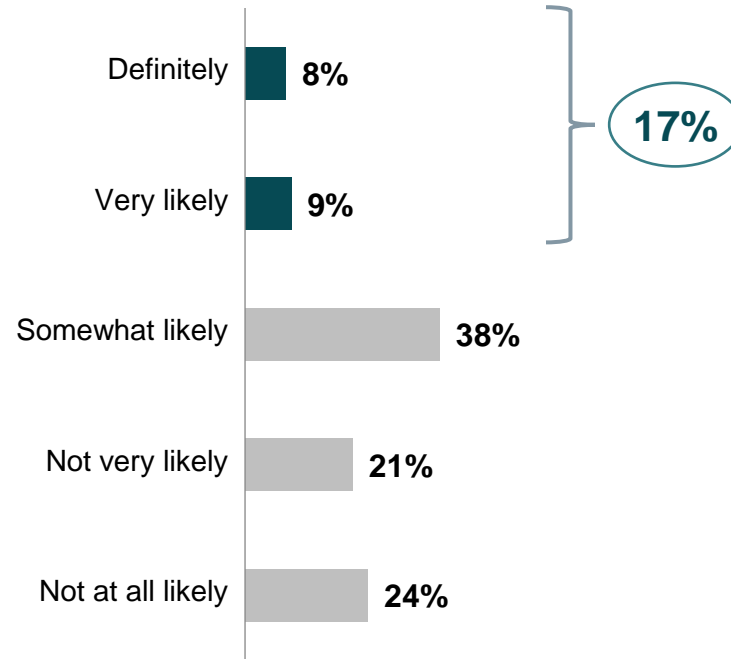
Definitely	**8%**
Very likely	**9%**
Somewhat likely	**38%**
Not very likely	**21%**
Not at all likely	**24%**

17%

Incidence Rate

27.0%

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

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

Long-Haul Pleasure Traveller Sizing

Total population aged 18 years or more[1]

Incidence rate

Size of the target market

105,639,500

x

27.0%

=

28,522,500

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)
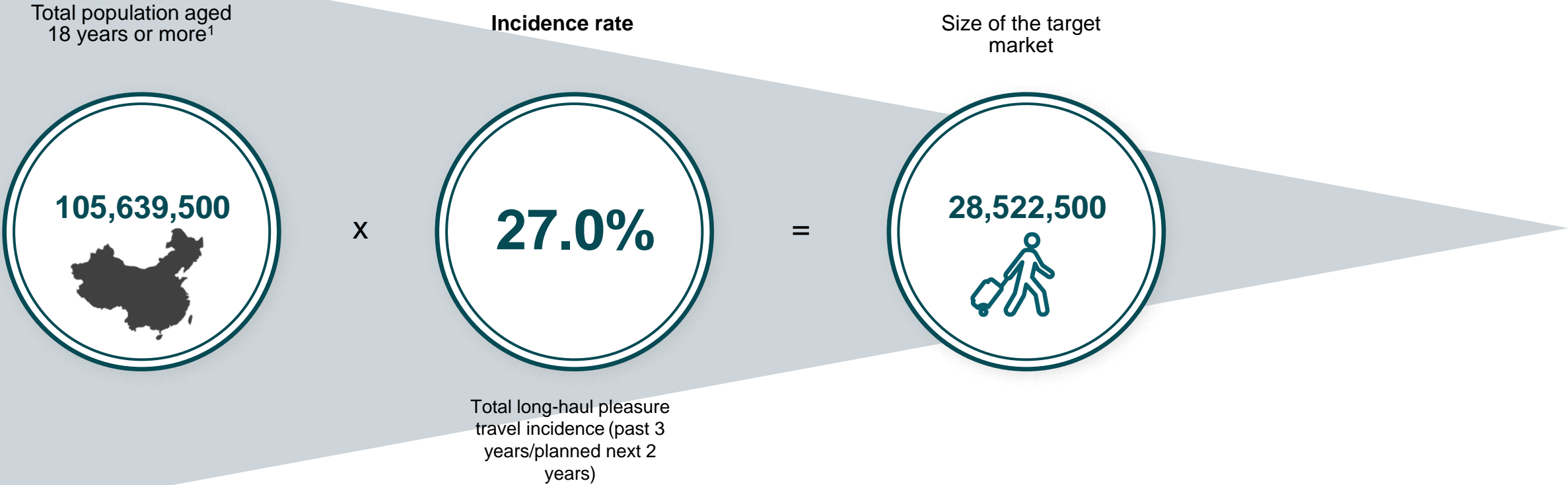
[1] Source: Estimates 2020 Census, China National Bureau of Statistics
Note: Results are from a random telephone omnibus survey undertaken in 2014.
Base: General population aged 18 plus in 11 cities (n=4475)

Potential Market Size For Canada
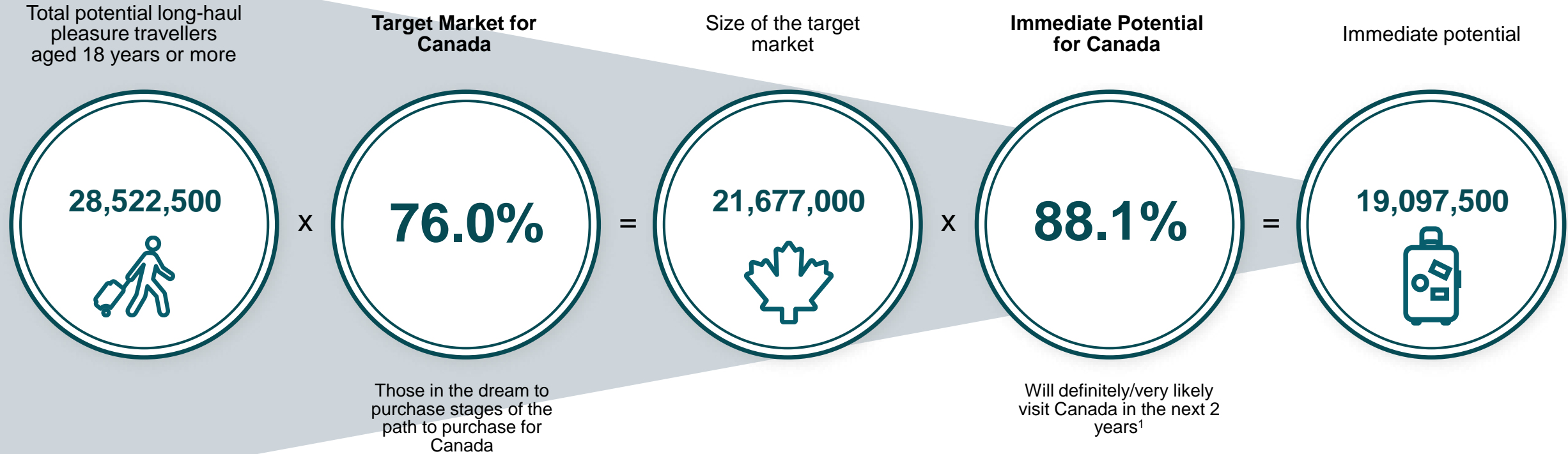
DESTINATION CANADA

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

Total potential long-haul pleasure travellers aged 18 years or more

28,522,500

X

Target Market for Canada

76.0%

Those in the dream to purchase stages of the path to purchase for Canada

=

Size of the target market

21,677,000

X

Immediate Potential for Canada

88.1%

Will definitely/very likely visit Canada in the next 2 years[1]

=

Immediate potential

19,097,500

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1676)
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)

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Potential Market Size For Canada

DESTINATION CANADA

Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*

Total potential long-haul pleasure 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
28,522,500	X	**37.6%**	=	**10,724,500**	X	**82.6%**	=	**8,858,500**	X	**91.4%**	=	**8,096,500**
		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 pleasure travellers (past 3 years or next 2 years), HVG Audience (n=828); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=684)
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

Immediate Potential for Canada:

Total China:	19,097,500
HVG Audience:	8,096,500

Total China

HVG Audience

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

YT
6.9% 7.6%
1,318 *616*

NWT
5.3% 6.0%
1,012 *486*

NU
2.4% 2.6%
459 *211*

NL
16.1% 17.1%
3,075 *1,385*

PEI
15.5% 17.5%
2,960 *1,417*

BC
24.6% 25.7%
4,698 *2,081*

AB
21.9% 24.9%
4,183 *2,016*

MB
23.3% 27.1%
4,450 *2,194*

QC
24.0% 26.5%
4,584 *2,146*

NB
13.7% 13.7%
2,617 *1,109*

SK
20.3% 23.0%
3,877 *1,863*

ON
35.5% 37.0%
6,780 *2,996*

NS
10.3% 10.5%
1,967 *850*

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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=1676); HVG (n=684)
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)

Key Performance Indicators

Prince Albert National Park
Saskatchewan

Key Performance Indicators

Indicator	Definition	All Long-haul Travellers (n=2204)	HVG Audience (n=828)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[1]	**5%**	**6%**
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	**63%**	**68%** ➕
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	**64%**	**73%** ➕
Past visitation	% who have ever visited Canada for pleasure	**56%**	**71%** ➕

[1] For trips in the next 2 years.
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B1. You mentioned that you are likely to take a long-haul holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** 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 East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** which was 4 or more nights long?

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

Key Performance Indicators: Seasonal & Indigenous

Indicator	Definition	All Long-haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada[1]	**8%**	**11%** 🟢
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November[2]	**34%**	**35%**
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada[1]	**9%**	**11%**
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February[2]	**27%**	**29%**
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	**4%**	**5%**

China GTRP – December 2023

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

Market Outlook

Market Outlook

Indicator	Definition	All Long-haul Travellers (n=2204)	HVG Audience (n=828)
Incidence of long-haul pleasure travel	% who have taken a long-haul pleasure trip in the past 3 years	**92%**	**100%** ⊕
Long-haul travel intentions	% who plan[1] to take a long-haul pleasure trip in the next 2 years	**93%**	**100%** ⊕
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan) in the next 12 months MINUS % who will <u>spend a little less</u>	**+14%**	**+29%**

[1] Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.
Base: Long-haul pleasure 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 East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** 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 East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** 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…

China GTRP – December 2023

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

Spending Intentions (in Next 12 Months)

DESTINATION CANADA

| | **Travelling within China** | | **Travelling within East Asia (e.g., Hong Kong, Macau, Japan, South Korea and Taiwan)** | | **Travelling outside East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** | |

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

	Total China	HVG Audience	Total China	HVG Audience	Total China	HVG Audience
A little more	57%	61% ⊕	34%	47% ⊕	30%	41% ⊕
About the same	40%	36% ⊖	51%	44% ⊖	53%	46% ⊖
A little less	3%	3%	15%	9% ⊖	17%	13% ⊖
Travel Market Outlook	**+53%**	**+57%**	**+20%**	**+38%**	**+14%**	**+29%**

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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…

China GTRP – December 2023

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

Types of Travel Trips

	Total China	HVG Audience

Legend: ▪ 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 China: 10% | 22% | 48% | 13% — **92%**
- HVG Audience: 6% ⊖ | 18% ⊖ | 54% ⊕ | 15% ⊕ — **94%** ⊕

International holiday trips (outside my home country)
- Total China: 20% | 29% | 23% | 7% — **79%**
- HVG Audience: 18% | 30% | 29% ⊕ | 10% ⊕ — **88%** ⊕

Business trips and meetings (outside my home country)
- Total China: 18% | 26% | 23% | 7% — **75%**
- HVG Audience: 15% ⊖ | 29% | 27% ⊕ | 11% ⊕ — **82%** ⊕

Trips to attend business conferences or events (outside my home country)
- Total China: 16% | 23% | 22% | 6% — **67%**
- HVG Audience: 15% | 26% ⊕ | 29% ⊕ | 8% ⊕ — **77%** ⊕

Added personal holiday days to a business trip
- Total China: 16% | 22% | 24% | 6% — **68%**
- HVG Audience: 14% | 27% ⊕ | 29% ⊕ | 8% ⊕ — **78%** ⊕

Holiday trips where I choose to also work remotely from my destination
- Total China: 14% | 21% | 22% | 7% — **64%**
- HVG Audience: 17% ⊕ | 23% | 29% ⊕ | 9% ⊕ — **77%** ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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

| | 74% | 90% ⊕ |

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

Total China
- 41% (5+ trips)
- 33% (3 to 4 trips)
- 12% (2 trips)
- 5% (1 trip)
- 8% (No trip)

HVG Audience
- 60% ⊕ (5+ trips)
- 30% ⊖ (3 to 4 trips)
- 10% ⊖ (2 trips)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
A8. How many holiday trips have you taken in the past 3 years?

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

Canada vs. Competitors

Peggy's Cove
Nova Scotia

Past Visitation

	Total China			HVG Audience		
	■ Visited more than 3 years ago	■ Visited in the past 3 years	*Ever visit*			
Australia	32%	25%	57%	38% ⊕	33% ⊕	71% ⊕
Canada	28%	28%	56%	36% ⊕	36% ⊕	71% ⊕
France	31%	22%	53%	38% ⊕	30% ⊕	68% ⊕
United States	30%	24%	53%	37% ⊕	34% ⊕	71% ⊕
New Zealand	32%	20%	52%	35% ⊕	29% ⊕	65% ⊕
United Kingdom	30%	21%	52%	35% ⊕	30% ⊕	65% ⊕
Germany	31%	18%	49%	36% ⊕	25% ⊕	61% ⊕
Italy	29%	20%	48%	36% ⊕	26% ⊕	62% ⊕
Switzerland	27%	18%	45%	33% ⊕	26% ⊕	59% ⊕
Netherlands	28%	16%	44%	35% ⊕	21% ⊕	55% ⊕
Spain	26%	17%	43%	32% ⊕	23% ⊕	55% ⊕
Sweden	26%	16%	41%	30% ⊕	24% ⊕	53% ⊕
Other	28%	16%	44%	34% ⊕	24% ⊕	57% ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** which was 4 or more nights long?

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

Unaided Long-Haul Destination Consideration (Next 2 Years)

Top Destination Brands[1]

- Total China
- HVG Audience

Destination	Total China	HVG Audience
Hong Kong	22%	24% (+)
South Korea	19%	26% (+)
Japan	19%	22% (+)
Macau	12%	13%
China	8%	7%
Taiwan	7%	8%
United States	6%	7%
Australia	5%	6%
Canada	**5%**	**6%**
France	5%	5%
Thailand	4%	5%
Singapore	4%	4%
United Kingdom	3%	4%
New Zealand	3%	2%
Italy	3%	4% (+)

Top Destinations[2]

- Total China
- HVG Audience

Destination	Total China	HVG Audience
China	35%	34%
South Korea	20%	27% (+)
Japan	20%	23% (+)
Macau	12%	13%
Taiwan	7%	8%
United States	6%	7%
Australia	5%	6%
Canada	**5%**	**6%**
France	5%	6%
Thailand	5%	5%
Singapore	4%	4%
United Kingdom	3%	4%
New Zealand	3%	2%
Italy	3%	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 pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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)

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

Path to Purchase for Canada

% NET Active Planning (top 4 box)

	Total China	HVG Audience
	27%	33% ➕

- ■ 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
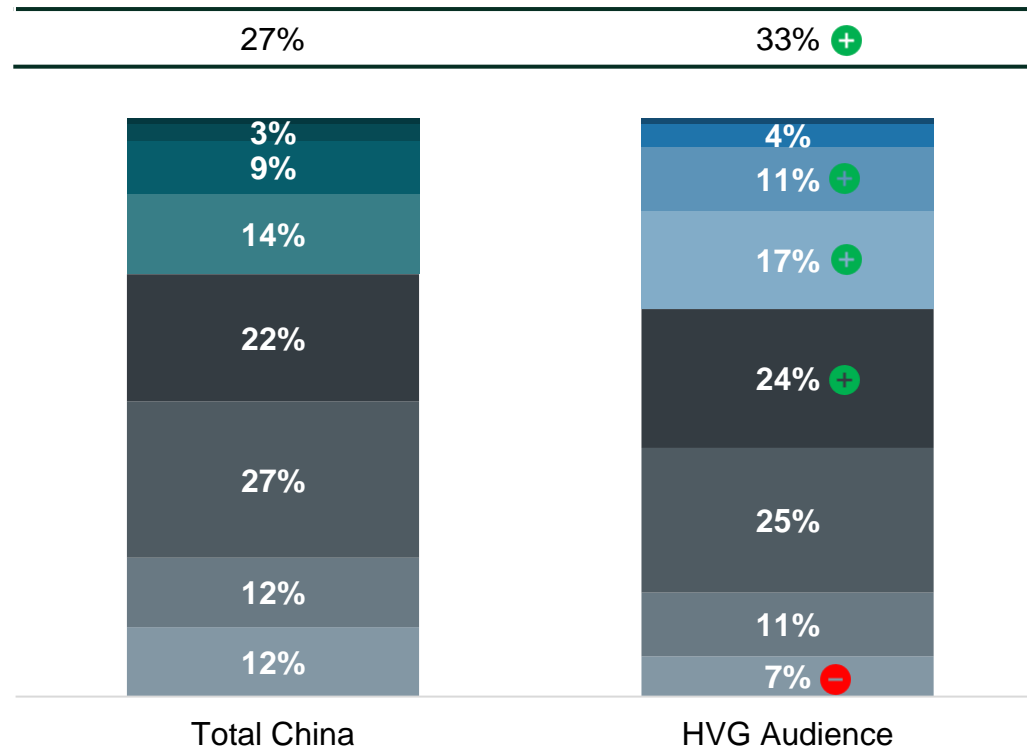
Total China

Segment	Value
Have already booked	3%
Currently making arrangements	9%
Planning the itinerary	14%
Started to gather information	22%
Seriously considering	27%
Dreaming about visiting	12%
Not interested	12%

HVG Audience

Segment	Value
Have already booked	4%
Currently making arrangements	11% ➕
Planning the itinerary	17% ➕
Started to gather information	24% ➕
Seriously considering	25%
Dreaming about visiting	11%
Not interested	7% ➖

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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 China

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)
Italy (n=602)	9%	13%	29%	19%	17%	8%	3%	29%
Netherlands (n=600)	12%	13%	26%	20%	16%	9%	4%	29%
United Kingdom (n=602)	12%	15%	27%	18%	14%	10%	3%	28%
Australia (n=602)	10%	16%	26%	20%	16%	8%	3%	27%
Canada (n=2204)	12%	12%	27%	22%	14%	9%	3%	27%
France (n=600)	10%	11%	31%	22%	12%	9%	5%	27%
New Zealand (n=603)	9%	15%	32%	20%	13%	10%		25%
Spain (n=601)	14%	15%	24%	21%	13%	7%	4%	25%
Sweden (n=600)	13%	14%	28%	21%	16%	6%	3%	25%
Germany (n=600)	12%	14%	25%	24%	13%	8%	3%	24%
Switzerland (n=601)	10%	12%	30%	24%	14%	7%		23%
United States (n=601)	13%	16%	25%	24%	12%	8%		22%

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [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	Never thought	Not interested	Dreaming	Seriously considering	Started gathering info	Planning itinerary	Making arrangements	Booked	NET Active Planning (Top 4 box)
Italy (n=229)	6% −	14%	26%	21%	21%	10%	2%		33%
Netherlands (n=226)	8% −	11%	24%	22%	19%	11%	6%		35% +
United Kingdom (n=226)	8% −	13%	23% −	17%	17%	16% +	6% +		40% +
Australia (n=217)	7% −	17%	26%	19%	19%	10%	3%		32%
Canada (n=828)	7% −	11%	25%	24% +	17% +	11% +	4%		33% +
France (n=239)	5% −	11%	31%	18% −	17% +	10%	8% +		35% +
New Zealand (n=223)	6%	13%	31%	23%	17% +	8%			26%
Spain (n=237)	11% −	15%	24%	20%	15%	10%	5%		30% +
Sweden (n=243)	9% −	14%	24%	24%	18%	7%	5%		30% +
Germany (n=221)	5% −	15%	26%	28%	12%	7%	4%	3% +	26%
Switzerland (n=222)	7% −	12%	22% −	29%	16%	10%	4%		31% +
United States (n=201)	6% −	16%	19% −	33% +	10%	12% +			25%

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

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

Destination Consideration (Next 2 Years)

DESTINATION CANADA

	Total China		HVG Audience	
	■4 ■5 - I am seriously considering *4 or 5 (out of 5)*			
Australia	40% | 24%	**64%**	41% | 28% ⊕	**69%** ⊕
Canada	**36% | 27%**	**63%**	**37% | 32%** ⊕	**68%** ⊕
France	40% | 23%	**63%**	43% ⊕ | 29% ⊕	**73%** ⊕
New Zealand	40% | 22%	**62%**	42% | 28% ⊕	**70%** ⊕
Switzerland	39% | 21%	**61%**	40% | 27% ⊕	**67%** ⊕
Italy	38% | 21%	**59%**	40% | 26% ⊕	**66%** ⊕
United Kingdom	40% | 20%	**59%**	42% ⊕ | 25% ⊕	**67%** ⊕
Germany	37% | 21%	**58%**	39% | 28% ⊕	**67%** ⊕
United States	37% | 21%	**58%**	40% ⊕ | 27% ⊕	**67%** ⊕
Sweden	38% | 20%	**57%**	40% | 25% ⊕	**64%** ⊕
Netherlands	40% | 17%	**56%**	42% | 21% ⊕	**63%** ⊕
Spain	38% | 19%	**56%**	41% ⊕ | 22% ⊕	**63%** ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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'.

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

Destination Consideration By Seasons

Total China	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=443)	27%	39%	34%	34%
Canada (n=1676)	27%	37%	38%	34%
France (n=476)	25%	42%	36%	31%
Germany (n=443)	23%	41%	35%	31%
Italy (n=465)	24%	38%	35%	32%
Netherlands (n=450)	21%	43%	35%	33%
New Zealand (n=460)	26%	37%	39%	33%
Spain (n=424)	25%	41%	37%	32%
Sweden (n=444)	29%	40%	39%	32%
Switzerland (n=466)	29%	38%	33%	30%
United Kingdom (n=444)	22%	40%	39%	30%
United States (n=429)	22%	36%	38%	31%

HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=166)	34% 🟢	42%	34%	31%
Canada (n=684)	29%	40%	39%	35%
France (n=201)	27%	44%	37%	34%
Germany (n=177)	25%	45%	40%	33%
Italy (n=183)	21%	42%	37%	34%
Netherlands (n=183)	26%	45%	38%	33%
New Zealand (n=180)	29%	32% 🔴	43%	34%
Spain (n=176)	27%	41%	37%	36%
Sweden (n=188)	30%	39%	41%	34%
Switzerland (n=181)	33%	38%	34%	31%
United Kingdom (n=180)	29% 🟢	42%	44%	33%
United States (n=156)	25%	38%	37%	37% 🟢

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

China GTRP – December 2023

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

Knowledge of Holiday Opportunities

Total China			HVG Audience		
■ Very good ■ Excellent		*Very good/Excellent*			
France (n=600)	45%	27%	**72%**	France (n=239)	50% ⊕	31%	***81%*** ⊕
Australia (n=602)	43%	24%	**67%**	Australia (n=217)	50% ⊕	28%	***77%*** ⊕
New Zealand (n=603)	39%	26%	**66%**	New Zealand (n=223)	35%	41% ⊕	***76%*** ⊕
Switzerland (n=601)	43%	22%	**66%**	Switzerland (n=222)	43%	28% ⊕	***71%*** ⊕
Canada (n=2204)	36%	28%	**64%**	Canada (n=828)	40% ⊕	33% ⊕	***73%*** ⊕
Netherlands (n=600)	43%	22%	**64%**	Netherlands (n=226)	47%	27% ⊕	***75%*** ⊕
United Kingdom (n=602)	43%	21%	**64%**	United Kingdom (n=226)	46%	24%	***70%*** ⊕
Germany (n=600)	40%	23%	**63%**	Germany (n=221)	45% ⊕	28% ⊕	***73%*** ⊕
Spain (n=601)	41%	22%	**63%**	Spain (n=237)	44%	26%	***70%*** ⊕
Italy (n=602)	40%	23%	**62%**	Italy (n=229)	41%	28% ⊕	***68%*** ⊕
Sweden (n=600)	41%	21%	**62%**	Sweden (n=243)	41%	28% ⊕	***69%*** ⊕
United States (n=601)	38%	21%	**60%**	United States (n=201)	43%	25%	***68%*** ⊕

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

China GTRP – December 2023

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

Destination Fit

	Total China			Top 3 box		HVG Audience			Top 3 box
	■8	■9	■10 - Exactly what I'm looking for			■8	■9	■10	
France (n=600)	25%	28%	17%	**69%**	France (n=239)	23%	30%	23% ⊕	**75%** ⊕
United Kingdom (n=602)	29%	26%	14%	**69%**	United Kingdom (n=226)	27%	32% ⊕	17%	**76%** ⊕
Italy (n=602)	28%	26%	14%	**68%**	Italy (n=229)	24%	28%	16%	**69%**
New Zealand (n=603)	30%	26%	13%	**68%**	New Zealand (n=223)	30%	26%	17% ⊕	**74%** ⊕
Australia (n=602)	28%	25%	14%	**67%**	Australia (n=217)	26%	25%	24% ⊕	**74%** ⊕
Canada (n=2204)	24%	26%	17%	**67%**	Canada (n=828)	26%	27%	22% ⊕	**75%** ⊕
Netherlands (n=600)	30%	25%	12%	**67%**	Netherlands (n=226)	27%	30% ⊕	18% ⊕	**75%** ⊕
Switzerland (n=601)	29%	25%	13%	**67%**	Switzerland (n=222)	29%	30% ⊕	14%	**73%** ⊕
Germany (n=600)	25%	27%	14%	**66%**	Germany (n=221)	28%	27%	19% ⊕	**73%** ⊕
Sweden (n=600)	28%	23%	13%	**65%**	Sweden (n=243)	25%	24%	19% ⊕	**67%**
Spain (n=601)	28%	26%	10%	**63%**	Spain (n=237)	24%	29%	16% ⊕	**68%**
United States (n=601)	28%	24%	10%	**62%**	United States (n=201)	25%	28%	14% ⊕	**68%** ⊕

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
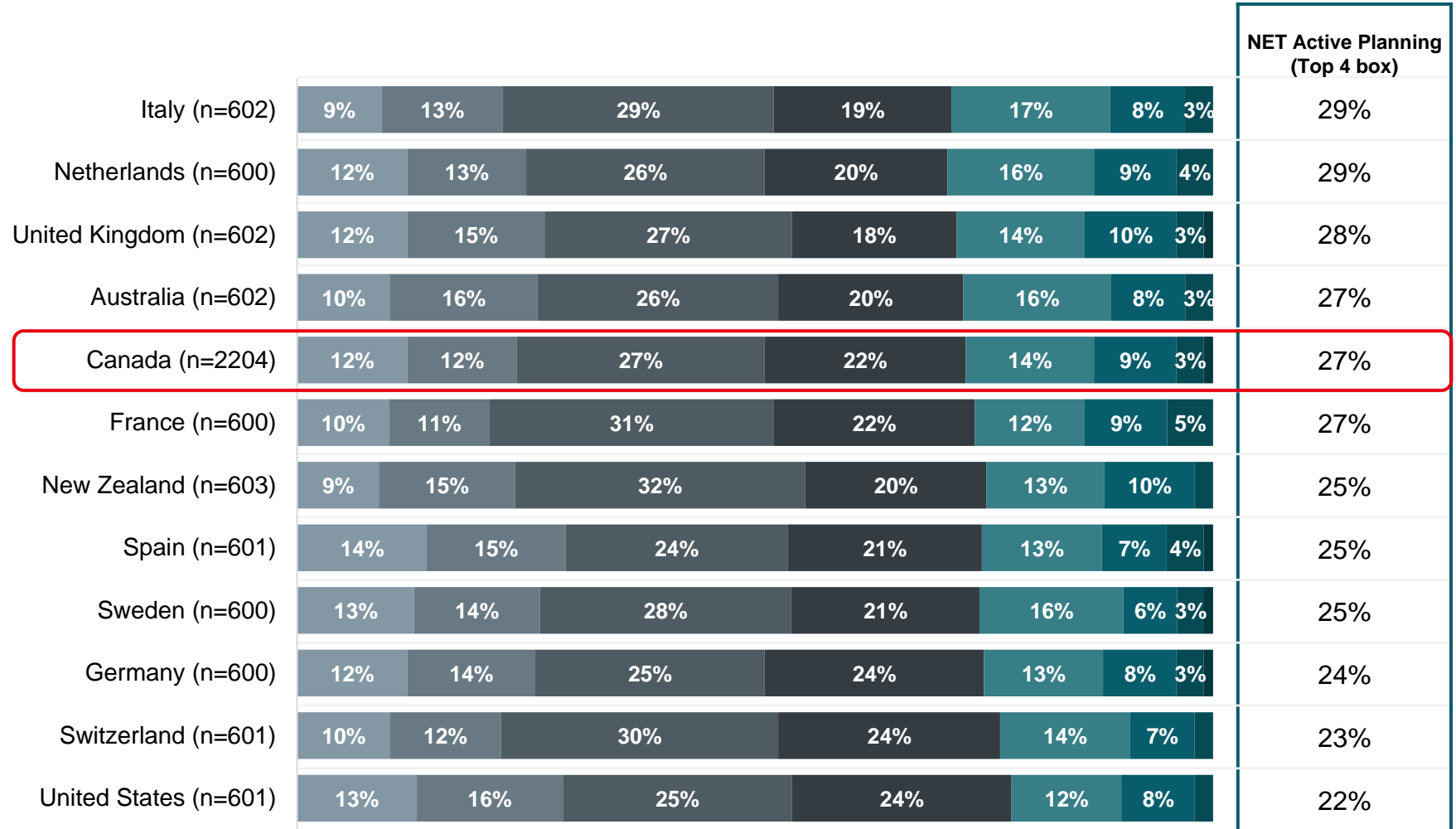Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
C3. Please rate each destination in terms of what you are looking for in a holiday destination.

China GTRP – December 2023

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

Destination Appeal

	Total China			Top 3 box		HVG Audience			Top 3 box
	8	9	10 - Agree completely			8	9	10 - Agree completely	
France (n=600)	27%	27%	19%	72%	France (n=239)	21% ⊖	31%	26% ⊕	77% ⊕
New Zealand (n=603)	27%	27%	15%	69%	New Zealand (n=223)	29%	27%	19% ⊕	76% ⊕
Switzerland (n=601)	28%	27%	13%	69%	Switzerland (n=222)	28%	29%	15%	73%
Australia (n=602)	28%	26%	13%	68%	Australia (n=217)	25%	28%	22% ⊕	75% ⊕
Netherlands (n=600)	28%	28%	11%	68%	Netherlands (n=226)	27%	35% ⊕	16% ⊕	79% ⊕
Canada (n=2204)	23%	28%	16%	67%	Canada (n=828)	25%	30%	21% ⊕	75% ⊕
Italy (n=602)	28%	26%	13%	67%	Italy (n=229)	27%	28%	15%	70%
Sweden (n=600)	27%	27%	12%	66%	Sweden (n=243)	25%	28%	18% ⊕	70%
United States (n=601)	30%	26%	10%	66%	United States (n=201)	32%	28%	13%	73% ⊕
Germany (n=600)	24%	27%	13%	65%	Germany (n=221)	25%	30%	19% ⊕	74% ⊕
Spain (n=601)	29%	25%	11%	65%	Spain (n=237)	27%	30% ⊕	13%	70% ⊕
United Kingdom (n=602)	23%	27%	16%	65%	United Kingdom (n=226)	20%	29%	20% ⊕	70%

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [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"*

China GTRP – December 2023

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

Net Promoter Score (NPS)

DESTINATION CANADA

	Total China		**HVG Audience**

■ Detractors (0-6) ■ Passives (7-8) ■ Promoters (9-10)

	Detractors	Passives	Promoters	NPS		Detractors	Passives	Promoters	NPS
Canada (n=1229)	12%	41%	47%	+35%	Canada (n=589)	11%	40%	49%	+38%
New Zealand (n=1137)	13%	45%	42%	+30%	New Zealand (n=537)	12%	40% 🔴	48% 🟢	+36% 🟢
Australia (n=1253)	13%	45%	42%	+29%	Australia (n=585)	12%	41% 🔴	47% 🟢	+35% 🟢
France (n=1168)	15%	42%	43%	+28%	France (n=563)	14%	41%	45%	+32%
Italy (n=1067)	14%	45%	41%	+27%	Italy (n=514)	12%	43%	45% 🟢	+33% 🟢
Switzerland (n=998)	15%	44%	41%	+27%	Switzerland (n=486)	13%	43%	44%	+31%
Spain (n=952)	14%	46%	40%	+26%	Spain (n=454)	13%	44%	42%	+29%
Germany (n=1090)	16%	43%	41%	+25%	Germany (n=505)	14%	39% 🔴	48% 🟢	+34% 🟢
United Kingdom (n=1137)	15%	45%	40%	+25%	United Kingdom (n=540)	14%	43%	43%	+29%
Sweden (n=910)	16%	45%	40%	+24%	Sweden (n=442)	14%	42%	44% 🟢	+29%
Netherlands (n=972)	16%	45%	39%	+23%	Netherlands (n=459)	15%	43%	42%	+27%
United States (n=1172)	18%	43%	39%	+22%	United States (n=587)	14% 🔴	45%	41%	+27% 🟢

Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul pleasure 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?

China GTRP – December 2023

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

Impressions of Canada as a Holiday Destination

DESTINATION CANADA

■ Total China   ■ HVG Audience

Statement	Total China	HVG Audience
Is a place where I can experience things that I can't experience at home	39%	41% ⊕
Has beautiful outdoor scenery and landscapes	38%	41% ⊕
Is a great place to see wildlife in its natural habitat	38%	42% ⊕
Is a place I would be proud to tell people I have visited	38%	40%
Has transport options that make it easy for me to get to from where I live	37%	38%
Has great outdoor activities I would participate in	37%	38%
Is a place I want to visit with my family	37%	38%
Is a place where I can explore several different cities or regions in one trip	37%	40%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	36%	40% ⊕
Is a place where I can get away from the stresses of everyday life	36%	38%
Is an environmentally-friendly travel destination	36%	39%
Its cities have a lot of great attractions to see and do	36%	38%
Has appealing festivals and events	35%	37%
Is a great place for shopping and browsing through stores	35%	35%

■ Total China   ■ HVG Audience

Statement	Total China	HVG Audience
Is a place I want to visit with friends	35%	41% ⊕
Is a place to form lifelong memories	35%	39% ⊕
Is a socially responsible travel destination	35%	37%
Offers activities that are physically challenging	35%	39% ⊕
Offers good value for money	35%	40% ⊕
Has great dining and food experiences	34%	39% ⊕
Has great historical or heritage sites and experiences	34%	36% ⊕
Is a place trending as a must-visit spot	34%	34%
Its cities have a great atmosphere	34%	35%
Has a culture that I would want to experience	33%	33%
Has a great arts and music scene	33%	33%
Is a great place for holidays that avoid surprises	33%	35%

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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.

China GTRP – December 2023

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

DESTINATION CANADA

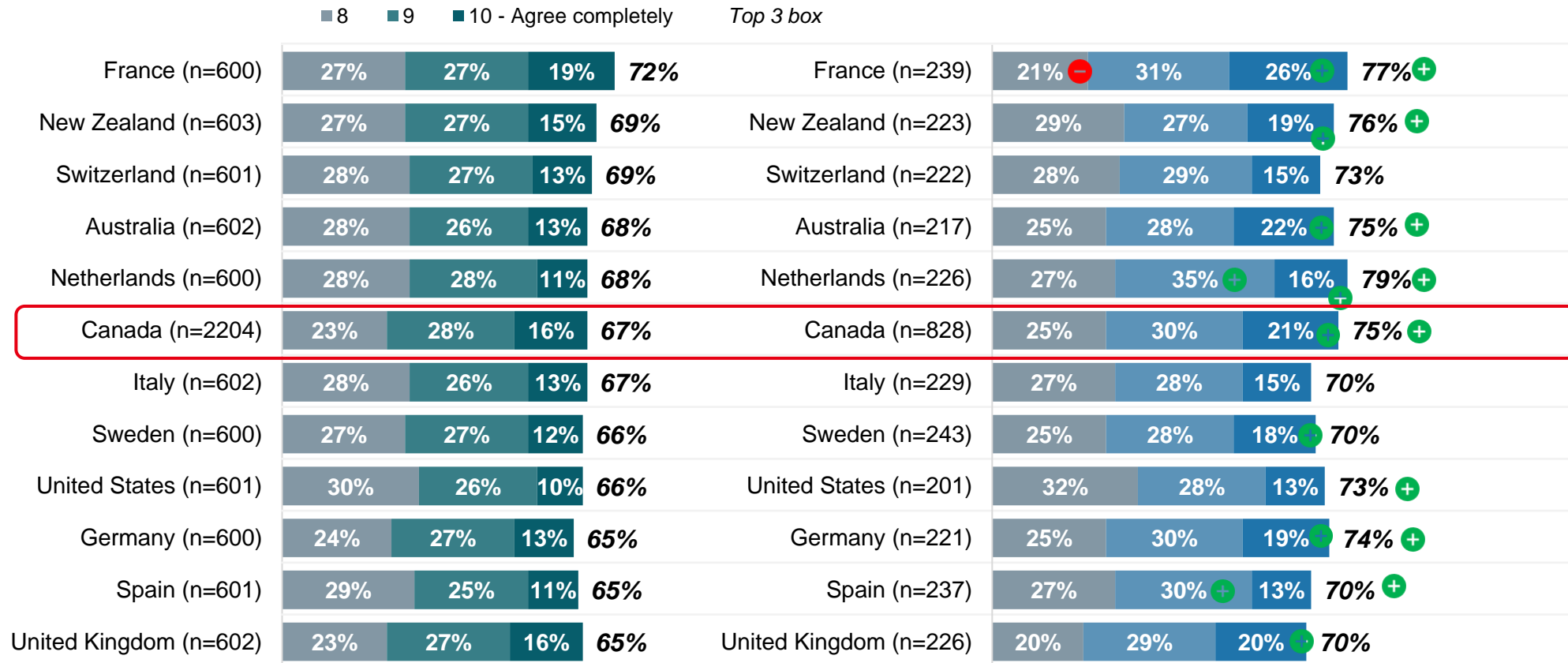|		Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
	n=	2204	602	600	600	602	600	603	601	600	601	602	601
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life				Strength								
	Is a place to form lifelong memories				Weakness								
	Is a place I would be proud to tell people I have visited								Strength				
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)			Weakness				Strength	Weakness		Strength		Weakness
	Is a place where I can explore several different cities or regions in one trip							Weakness					
	Offers good value for money							Strength			Strength	Weakness	
	Has transport options that make it easy for me to get to from where I live			Strength	Strength		Weakness	Weakness				Weakness	Strength
Type of Trip	Is a place I want to visit with friends											Strength	
	Is a place I want to visit with my family				Weakness		Strength					Weakness	
	Is a great place for holidays that avoid surprises				Strength					Weakness			
	Is a place where I can experience things that I can't experience at home												
	Is an environmentally-friendly travel destination					Weakness		Strength	Weakness		Strength		Weakness
	Is a socially responsible travel destination								Weakness	Strength			
	Is a place trending as a must-visit spot					Strength							
To-Do	Offers activities that are physically challenging			Weakness	Strength	Weakness							
	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								Strength				
	Has great outdoor activities I would participate in			Strength	Weakness		Strength		Strength				
	Has great dining and food experiences		Weakness	Strength		Strength			Strength			Weakness	
	Has a great arts and music scene				Strength			Weakness	Strength			Weakness	
	Has appealing festivals and events								Strength				
To-See	Its cities have a great atmosphere										Strength		
	Has beautiful outdoor scenery and landscapes							Strength					
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness		Weakness		Strength	Weakness			Strength	Strength
	Has great historical or heritage sites and experiences			Weakness	Strength	Strength		Weakness					Weakness
	Has a culture that I would want to experience	Weakness											

Strength **Weakness**

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

China GTRP – December 2023

DESTINATION CANADA

	Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
n=	828	217	239	221	229	226	223	237	243	222	226	201
Higher Order Motivations												
Is a place where I can get away from the stresses of everyday life							S					W
Is a place to form lifelong memories				W		W		S		S		W
Is a place I would be proud to tell people I have visited										W		
General Needs												
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)			W			S	S	W		S		
Is a place where I can explore several different cities or regions in one trip					W							
Offers good value for money							S					
Has transport options that make it easy for me to get to from where I live			S	S		W	W					S
Type of Trip												
Is a place I want to visit with friends							S					S
Is a place I want to visit with my family				W	S	S			W		W	
Is a great place for holidays that avoid surprises					W		S	S				
Is a place where I can experience things that I can't experience at home			W			W						
Is an environmentally-friendly travel destination								W	S	S	W	W
Is a socially responsible travel destination												W
Is a place trending as a must-visit spot	W									S		
To-Do												
Offers activities that are physically challenging					W						S	
Is a great place for shopping and browsing through stores		W	S					W	W	S		S
Its cities have a lot of great attractions to see and do								S				
Has great outdoor activities I would participate in			W			S						
Has great dining and food experiences												S
Has a great arts and music scene			S		S			W				
Has appealing festivals and events					S			S			W	W
To-See												
Its cities have a great atmosphere												
Has beautiful outdoor scenery and landscapes							S					
Is a great place to see wildlife in its natural habitat	S		W			W		W				
Has great historical or heritage sites and experiences		W	S		S	S	W			S		W
Has a culture that I would want to experience	W											

Strength (green) **Weakness** (pink)

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

China GTRP – December 2023

Brand Value Statements for Canada
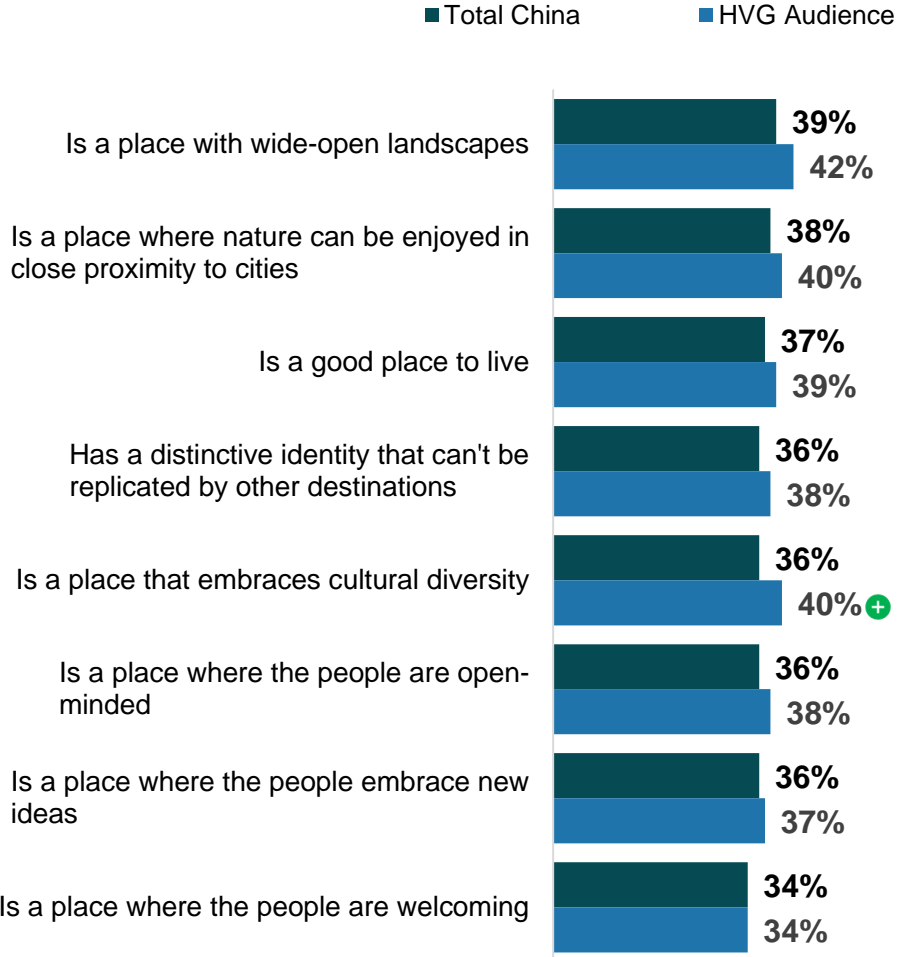
Legend: ■ Total China ■ HVG Audience

Statement	Total China	HVG Audience
Is a place with wide-open landscapes	39%	42%
Is a place where nature can be enjoyed in close proximity to cities	38%	40%
Is a good place to live	37%	39%
Has a distinctive identity that can't be replicated by other destinations	36%	38%
Is a place that embraces cultural diversity	36%	40% ⊕
Is a place where the people are open-minded	36%	38%
Is a place where the people embrace new ideas	36%	37%
Is a place where the people are welcoming	34%	34%

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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.

China GTRP – December 2023

Brand Value Statements: Among Total China

	Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
n=	2204	602	600	600	602	600	603	601	600	601	602	601
Is a place with wide-open landscapes	Strength				Weakness							
Is a place where nature can be enjoyed in close proximity to cities		Strength										
Is a place that embraces cultural diversity		Weakness								Weakness		Strength
Is a place where the people are welcoming						Strength		Strength				Weakness
Is a place where the people are open-minded		Weakness	Strength				Weakness					
Is a place where the people embrace new ideas							Weakness					Strength
Is a good place to live							Strength					
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 pleasure 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.

China GTRP – December 2023

Brand Value Statements: Among HVG Audience

	Canada	Australia	France	Germany	Italy	Netherlands	New Zealand	Spain	Sweden	Switzerland	United Kingdom	United States
n=	828	217	239	221	229	226	223	237	243	222	226	201
Is a place with wide-open landscapes					Weakness		Strength					Weakness
Is a place where nature can be enjoyed in close proximity to cities		Strength	Weakness	Weakness			Weakness					
Is a place that embraces cultural diversity		Weakness			Weakness				Strength			Strength
Is a place where the people are welcoming	Weakness				Strength		Weakness				Strength	Weakness
Is a place where the people are open-minded			Strength	Strength					Weakness			
Is a place where the people embrace new ideas						Weakness						Strength
Is a good place to live												Weakness
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 pleasure 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.

China GTRP – December 2023

Destination Attributes: Drivers Analysis: Among Total China

☐ = Brand Value Statement

Attribute	Value
Offers good value for money	5.05%
Is a place I want to visit with friends	4.86%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	4.40%
Is a place I want to visit with my family	4.13%
Is a place that embraces cultural diversity	3.79%
Is a place I would be proud to tell people I have visited	3.74%
Is a socially responsible travel destination	3.71%
Is a great place for holidays that avoid surprises	3.57%
Is a place trending as a must-visit spot	3.55%
Is a place where I can get away from the stresses of everyday life	3.40%
Is a place where the people are welcoming	3.40%
Is an environmentally-friendly travel destination	3.39%
Has a distinctive identity that can't be replicated by other destinations	3.37%
Has transport options that make it easy for me to get to from where I live	3.31%
Is a place where I can explore several different cities or regions in one trip	3.28%
Is a place where I can experience things that I can't experience at home	3.24%
Its cities have a lot of great attractions to see and do	3.18%
Is a place where nature can be enjoyed in close proximity to cities	3.07%
Is a place where the people are open-minded	3.03%
Is a place to form lifelong memories	2.90%
Is a place with wide-open landscapes	2.78%
Has great dining and food experiences	2.71%
Is a good place to live	2.52%
Is a place where the people embrace new ideas	2.46%
Has great outdoor activities I would participate in	2.17%
Has appealing festivals and events	2.09%
Has great historical or heritage sites and experiences	2.08%
Has beautiful outdoor scenery and landscapes	2.00%
Is a great place for shopping and browsing through stores	1.82%
Has a great arts and music scene	1.75%
Has a culture that I would want to experience	1.42%
Offers activities that are physically challenging	1.38%
Is a great place to see wildlife in its natural habitat	1.33%
Its cities have a great atmosphere	1.11%

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 pleasure 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 CANADA

☐ = Brand Value Statement

Attribute	Value
Offers good value for money	5.13%
Is a place where the people are welcoming	4.35%
Is a place I want to visit with friends	4.23%
Is a great place for shopping and browsing through stores	4.22%
Has transport options that make it easy for me to get to from where I live	3.92%
Is a place where the people are open-minded	3.89%
Is a great place to see wildlife in its natural habitat	3.77%
Is a place that embraces cultural diversity	3.72%
Is a place where nature can be enjoyed in close proximity to cities	3.67%
Has great historical or heritage sites and experiences	3.52%
Is a good place to live	3.50%
Its cities have a great atmosphere	3.28%
Is a great place for holidays that avoid surprises	3.12%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	3.04%
Is an environmentally-friendly travel destination	3.02%
Has a great arts and music scene	2.85%
Is a socially responsible travel destination	2.85%
Has great outdoor activities I would participate in	2.82%
Has beautiful outdoor scenery and landscapes	2.81%
Is a place to form lifelong memories	2.79%
Is a place I want to visit with my family	2.76%
Is a place with wide-open landscapes	2.65%
Is a place I would be proud to tell people I have visited	2.50%
Has great dining and food experiences	2.44%
Is a place trending as a must-visit spot	2.41%
Is a place where I can explore several different cities or regions in one trip	2.27%
Is a place where I can get away from the stresses of everyday life	2.22%
Is a place where I can experience things that I can't experience at home	2.08%
Is a place where the people embrace new ideas	1.95%
Has a culture that I would want to experience	1.81%
Has a distinctive identity that can't be replicated by other destinations	1.65%
Its cities have a lot of great attractions to see and do	1.63%
Offers activities that are physically challenging	1.62%
Has appealing festivals and events	1.49%

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 pleasure 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.

China 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

52%	59% ➕

4+ Nights Long Trip

% Top 2 box

53%	64% ➕

Legend:
- Definitely
- Very likely
- Somewhat likely
- Not interested

1-3 Night Short Trip

Total China:
- Definitely: 18%
- Very likely: 34%
- Somewhat likely: 17%
- Not interested: 31%

HVG Audience:
- Definitely: 25% ➕
- Very likely: 34%
- Somewhat likely: 18%
- Not interested: 24% ➖

4+ Nights Long Trip

Total China:
- Definitely: 20%
- Very likely: 33%
- Somewhat likely: 18%
- Not interested: 29%

HVG Audience:
- Definitely: 26% ➕
- Very likely: 37% ➕
- Somewhat likely: 14% ➖
- Not interested: 22% ➖

NET: Definitely/ Very Likely to visit Canada in the next 2 years

Total: 67%
HVG: 75% ➕

39 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 pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

China GTRP – December 2023

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

Canadian Destinations Likely to Visit

DESTINATION CANADA

	Total China
	HVG Audience

Northwest Territories
Total China	HVG	
5%	6%	
3%	3%	Yellowknife
4%	4%	Inuvik
2%	3% ⊕	Other – NWT

Nunavut
Total China	HVG	
2%	3%	
2%	2%	Iqaluit
2%	2%	Other – NU

Quebec
Total China	HVG	
24%	26%	
12%	15% ⊕	Montréal
13%	14%	Québec City
13%	14%	Mont Tremblant
3%	2%	Other – QC

Yukon
Total China	HVG	
7%	8%	
4%	5%	Whitehorse
4%	5%	Dawson City
3%	3%	Other – YT

Newfoundland & Labrador
Total China	HVG	
16%	17%	
13%	14%	St. John's
9%	10%	Other - NL

British Columbia
Total China	HVG	
25%	26%	
15%	16%	Rocky Mountains
18%	20%	Vancouver
12%	13%	Victoria
5%	4%	Whistler
5%	5%	Okanagan
2%	4% ⊕	Other – BC

Prince Edward Island
Total China	HVG	
15%	18%	
11%	13% ⊕	Charlottetown
10%	11%	Other - PEI

New Brunswick
Total China	HVG	
14%	14%	
7%	6%	Fredericton
8%	9%	Saint John
4%	4%	Other - NB

Alberta
Total China	HVG	
22%	25% ⊕	
9%	11%	Rocky Mountains
6%	8%	Calgary
7%	9% ⊕	Edmonton
6%	6%	Banff
7%	7%	Jasper
2%	3%	Other – AB

Nova Scotia
Total China	HVG	
10%	11%	
6%	6%	Halifax
5%	6%	Cape Breton
4%	4%	Other - NS

Saskatchewan
Total China	HVG	
20%	23% ⊕	
10%	11%	Regina
10%	12%	Saskatoon
7%	9% ⊕	Other – SK

Manitoba
Total China	HVG	
23%	27% ⊕	
12%	14% ⊕	Winnipeg
11%	12%	Churchill
8%	7%	Other – MB

Ontario
Total China	HVG	
36%	37%	
18%	19%	Ottawa
19%	20%	Niagara Falls
21%	22%	Toronto
9%	10%	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=1676); HVG (n=684)
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)

China GTRP – December 2023

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

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

Total China

HVG Audience

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

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

Quebec
3%	3%	**Winter** (Dec, Jan, Feb)
9%	11% ⊕	**Spring** (Mar, Apr, May)
10%	11%	**Summer** (Jun, Jul, Aug)
8%	10% ⊕	**Fall** (Sept, Oct, Nov)

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

Newfoundland & Labrador
2%	4% ⊕	**Winter** (Dec, Jan, Feb)
6%	6%	**Spring** (Mar, Apr, May)
7%	6%	**Summer** (Jun, Jul, Aug)
6%	7%	**Fall** (Sept, Oct, Nov)

British Columbia
5%	4%	**Winter** (Dec, Jan, Feb)
8%	9%	**Spring** (Mar, Apr, May)
9%	10%	**Summer** (Jun, Jul, Aug)
10%	11%	**Fall** (Sept, Oct, Nov)

Prince Edward Island
3%	2%	**Winter** (Dec, Jan, Feb)
6%	7%	**Spring** (Mar, Apr, May)
6%	7% ⊕	**Summer** (Jun, Jul, Aug)
5%	6%	**Fall** (Sept, Oct, Nov)

Alberta
5%	5%	**Winter** (Dec, Jan, Feb)
11%	12%	**Spring** (Mar, Apr, May)
8%	9%	**Summer** (Jun, Jul, Aug)
5%	5%	**Fall** (Sept, Oct, Nov)

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

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

Saskatchewan
4%	4%	**Winter** (Dec, Jan, Feb)
12%	15% ⊕	**Spring** (Mar, Apr, May)
7%	7%	**Summer** (Jun, Jul, Aug)
4%	3%	**Fall** (Sept, Oct, Nov)

Manitoba
3%	4% ⊕	**Winter** (Dec, Jan, Feb)
10%	13% ⊕	**Spring** (Mar, Apr, May)
9%	9%	**Summer** (Jun, Jul, Aug)
6%	6%	**Fall** (Sept, Oct, Nov)

Ontario
5%	5%	**Winter** (Dec, Jan, Feb)
12%	15% ⊕	**Spring** (Mar, Apr, May)
16%	16%	**Summer** (Jun, Jul, Aug)
11%	11%	**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=1676); HVG (n=684)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

China GTRP – December 2023

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

Barriers for Visiting Canada

■ Total China   ■ HVG Audience

Barrier	Total China	HVG Audience
Extreme weather conditions	23%	23%
Safety concerns	20%	19%
Not enough time to take a holiday	19%	19%
Poor weather	19%	17%
Health risks	17%	18%
Visa requirements	17%	17%
Cost	15%	11% ⊖
Delays and hassles at airports and borders	15%	15%
Destinations and attractions too far apart	15%	15%
Language barrier / don't speak my language	13%	13%
Poor value for money	13%	12%
Unfavourable conditions for driving during winter	12%	14% ⊕
There are other places I would rather visit	12%	12%
Too far / flight too long	12%	13%
Too many crowds at the places I want to visit in Canada	12%	11%
Unable to take a holiday during months when I want to visit Canada	12%	12%
Has no iconic attractions I want to see	11%	11%
There is no reason to visit anytime soon	10%	10%
Nothing would prevent me from travelling to Canada	4%	7% ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

China 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 China (n=2204)	**HVG Audience** (n=828)
Nature walks	Nature walks
Oceanside beaches	Oceanside beaches
Trying local food and drink	Lakeside beaches
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Lakeside beaches	Trying local food and drink
Amusement or theme parks	Amusement or theme parks
Historical, archaeological or world heritage sites	Nature parks ➕
Nature parks	Historical, archaeological or world heritage sites
Cultural or traditional festivals	Viewing wildlife or marine life
Autumn colours	Learning about Indigenous culture, traditions or history

Top 10 Trip Anchor Activities	
Total China (n=2196)	**HVG Audience** (n=821)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Trying local food and drink	Trying local food and drink
Nature walks	Nature walks
Amusement or theme parks	Amusement or theme parks
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Oceanside beaches	Learning about Indigenous culture, traditions or history ➕
Lakeside beaches	Oceanside beaches
Learning about Indigenous culture, traditions or history	Lakeside beaches
Autumn colours	Viewing wildlife or marine life
Viewing wildlife or marine life	Cultural or traditional festivals

Base: Long-haul pleasure 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)

China GTRP – December 2023

General Activities Interested In

DESTINATION CANADA

■ Total China ■ HVG Audience

Activity	Total China	HVG Audience
Nature walks	39%	39%
Oceanside beaches	37%	39%
Trying local food and drink	35%	35%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	35%	36%
Lakeside beaches	35%	37%
Amusement or theme parks	30%	32%
Historical, archaeological or world heritage sites	28%	29%
Nature parks	27%	30% +
Cultural or traditional festivals	27%	28%
Autumn colours	27%	25%
Snowshoeing or cross country skiing	27%	28%
Viewing wildlife or marine life	27%	28%
Learning about Indigenous culture, traditions or history	26%	28%
Food and drink festivals or events	26%	28%
City green spaces like parks or gardens	25%	25%
Fine dining	25%	28% +
Camping	25%	25%
Culinary tours or cooking classes	24%	25%
Shopping for items that help me remember my trip	24%	25%

Activity	Total China	HVG Audience
Shopping for clothes and shoes	24%	25%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	23%	24%
Fishing or angling	23%	23%
Downhill skiing or snowboarding	23%	24%
Art galleries or museums	22%	24%
Local markets (e.g. public markets, farmers market, night markets)	22%	23%
Agricultural or country farm tours	21%	20%
Mountain biking	21%	20%
Music festivals	20%	21%
Spring blossoms	20%	20%
Northern lights	20%	19%
Nightlife	20%	21%
Hiking	20%	21%
Guided nature tours	19%	19%
Travelling to remote destinations	19%	18%
Kayaking, canoeing or paddle boarding	19%	17%
Self-guided driving tours or road trips	18%	18%
Winter festivals	18%	20% +
Shopping for luxury items	18%	20% +
Heli-skiing	18%	17%

Activity	Total China	HVG Audience
Golfing	17%	18%
Road cycling	17%	16%
Casual biking	16%	16%
Breweries or wineries	16%	18%
Movie festivals	16%	18%
Guided city tours	16%	15%
Exploring places most tourists won't go to	16%	17%
Guided boat tours	15%	15%
Sporting events (to attend or participate)	15%	17% +
Hunting	15%	13%
Guided train tours	14%	12%
Guided airplane or helicopter tours	13%	13%
Wilderness lodges	13%	15%
Comedy festivals	13%	15% +
Spa or wellness centres	12%	14%
Rodeos	12%	11%
Cruises	11%	11%
Renting a recreational vehicle (RV)	10%	11%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

China GTRP – December 2023

Trip Anchor Activities

DESTINATION CANADA

Legend: ■ Total China ■ HVG Audience

Activity	Total China	HVG Audience
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	20%	20%
Trying local food and drink	19%	19%
Nature walks	16%	17%
Amusement or theme parks	14%	16%
Historical, archaeological or world heritage sites	14%	15%
Oceanside beaches	14%	15%
Lakeside beaches	14%	14%
Learning about Indigenous culture, traditions or history	13%	15% ⊕
Autumn colours	12%	12%
Viewing wildlife or marine life	12%	13%
Nature parks	12%	12%
Food and drink festivals or events	11%	12%
Fine dining	11%	12%
Cultural or traditional festivals	11%	12%
Culinary tours or cooking classes	10%	11%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	10%	11%
City green spaces like parks or gardens	10%	10%
Art galleries or museums	9%	10%
Snowshoeing or cross country skiing	9%	9%

Activity	Total China	HVG Audience
Northern lights	9%	8%
Shopping for items that help me remember my trip	9%	10%
Shopping for clothes and shoes	8%	9%
Camping	8%	10% ⊕
Local markets (e.g. public markets, farmers market, night markets)	8%	9%
Downhill skiing or snowboarding	8%	8%
Agricultural or country farm tours	8%	8%
Spring blossoms	8%	8%
Nightlife	8%	8%
Fishing or angling	7%	6%
Self-guided driving tours or road trips	7%	8%
Music festivals	7%	7%
Winter festivals	7%	7%
Shopping for luxury items	7%	9% ⊕
Guided nature tours	7%	7%
Breweries or wineries	6%	6%
Kayaking, canoeing or paddle boarding	6%	5% ⊖
Travelling to remote destinations	6%	7%
Heli-skiing	6%	6%
Exploring places most tourists won't go to	6%	6%

Activity	Total China	HVG Audience
Mountain biking	5%	5%
Casual biking	5%	5%
Guided boat tours	5%	6%
Guided city tours	5%	4%
Movie festivals	5%	5%
Sporting events (to attend or participate)	5%	7% ⊕
Road cycling	5%	5%
Guided train tours	5%	4%
Guided airplane or helicopter tours	5%	5%
Golfing	5%	5%
Hiking	4%	5%
Cruises	4%	4%
Rodeos	4%	5%
Wilderness lodges	4%	4%
Spa or wellness centres	4%	5%
Hunting	4%	3%
Comedy festivals	4%	5% ⊕
Renting a recreational vehicle (RV)	3%	4%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) Selected an activity (n=2196); HVG (n=821)
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)

China GTRP – December 2023

Priority of Sustainable Travel When Planning a Trip

% Score 5 to 7 (out of 7)

91%	95% ➕

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

Total China
- 24%
- 43%
- 25%
- 7%

HVG Audience
- 32% ➕
- 44%
- 20% ➖
- 4% ➖

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 pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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'.

China GTRP – December 2023

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

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

■ Total China   ■ HVG Audience

Effort	Total China	HVG Audience
Dining options that use local and/or organic ingredients	34%	35%
Conservation of natural areas in my destination	32%	31%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	30%	29%
Knowing that the local community in my destination is open and welcoming to travellers	30%	31%
Eco-friendly accommodations in my destination	27%	28%
Eco-tour activities in my destination	27%	28%
Knowing that the local culture of my destination is not negatively impacted by tourism	26%	25%
Efforts to reduce overcrowding in my destination	23%	24%
Knowing that my money is directly supporting the local community	21%	20%

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 pleasure travellers (past 3 years or next 2 years), Rated 5-7 at D7 (n=2013); HVG (n=788)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

China GTRP – December 2023

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

Barriers to Sustainable Travel

■ Total China   ■ HVG Audience

Sustainable travel is more expensive
- 37%
- 33% ⊖

There is a lack of information about how to travel sustainably
- 35%
- 33%

Travelling sustainably is too time consuming
- 34%
- 33%

Sustainable travel doesn't meet my needs for comfort when travelling
- 34%
- 36%

Travelling sustainably would limit the types of activities I can do
- 33%
- 36% ⊕

Sustainable travel doesn't meet my needs for luxury when travelling
- 30%
- 29%

None of the above
- 7%
- 8%

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 pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

China GTRP – December 2023

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

Impact of Extreme Weather Events on Travel Plans

% Top 2 box

82%	80%

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

Total China
- 30%
- 52%
- 14%
- 4%

HVG Audience
- 33%
- 47% ⊖
- 15%
- 5%

% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	53%	54%
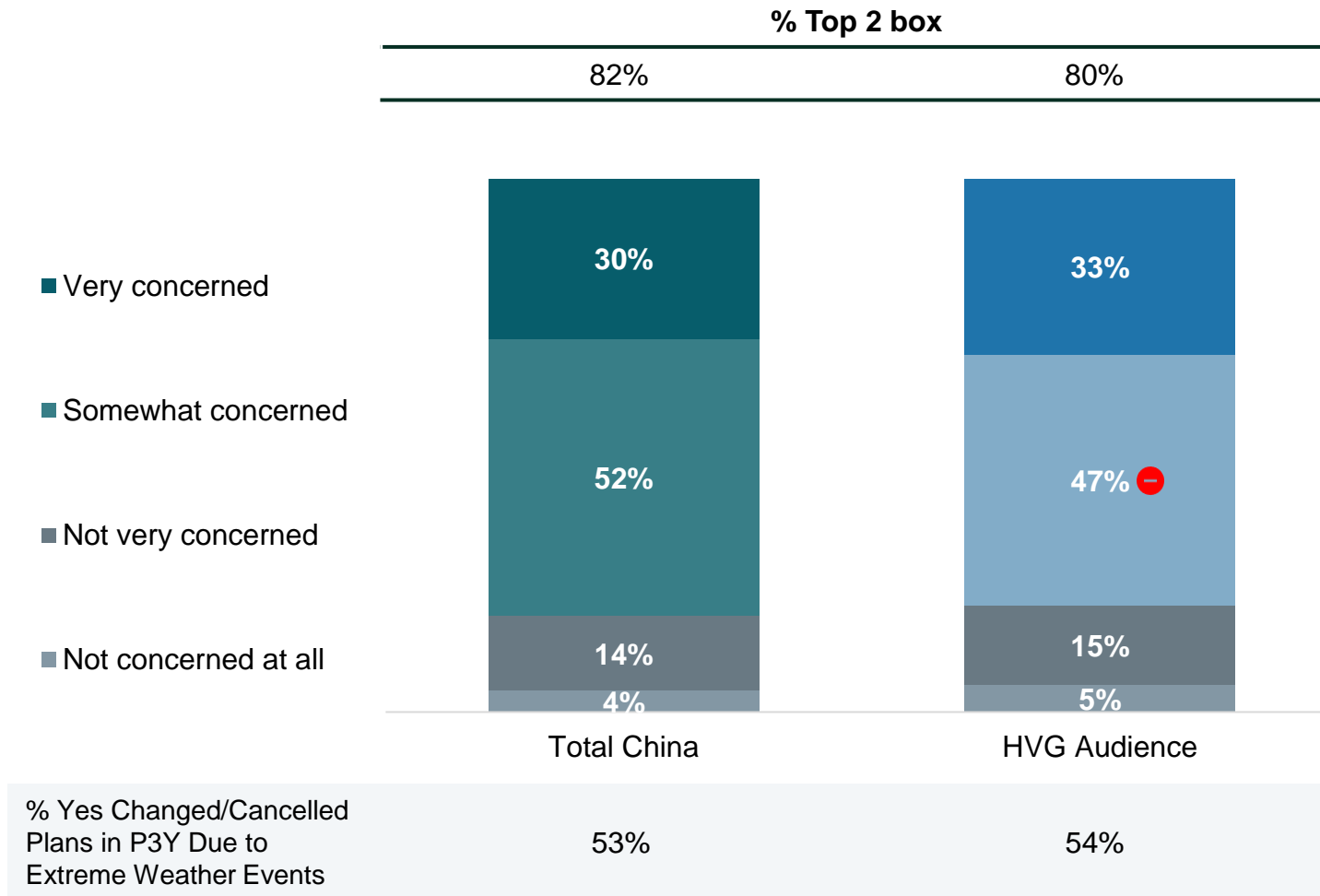
Extreme Weather Events Description

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 pleasure travellers (past 3 years or next 2 years) (n=1092); HVG (n=413)
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?

China GTRP – December 2023

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

Impact of International Conflicts & Unrest on Travel Plans

DESTINATION CANADA

% Top 2 box

79%	80%

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

Total China
- 27%
- 52%
- 15%
- 7%

HVG Audience
- 31% ⊕
- 49%
- 13%
- 7%

% Yes Changed/Cancelled Plans in P3Y Due to International Conflicts	48%	47%
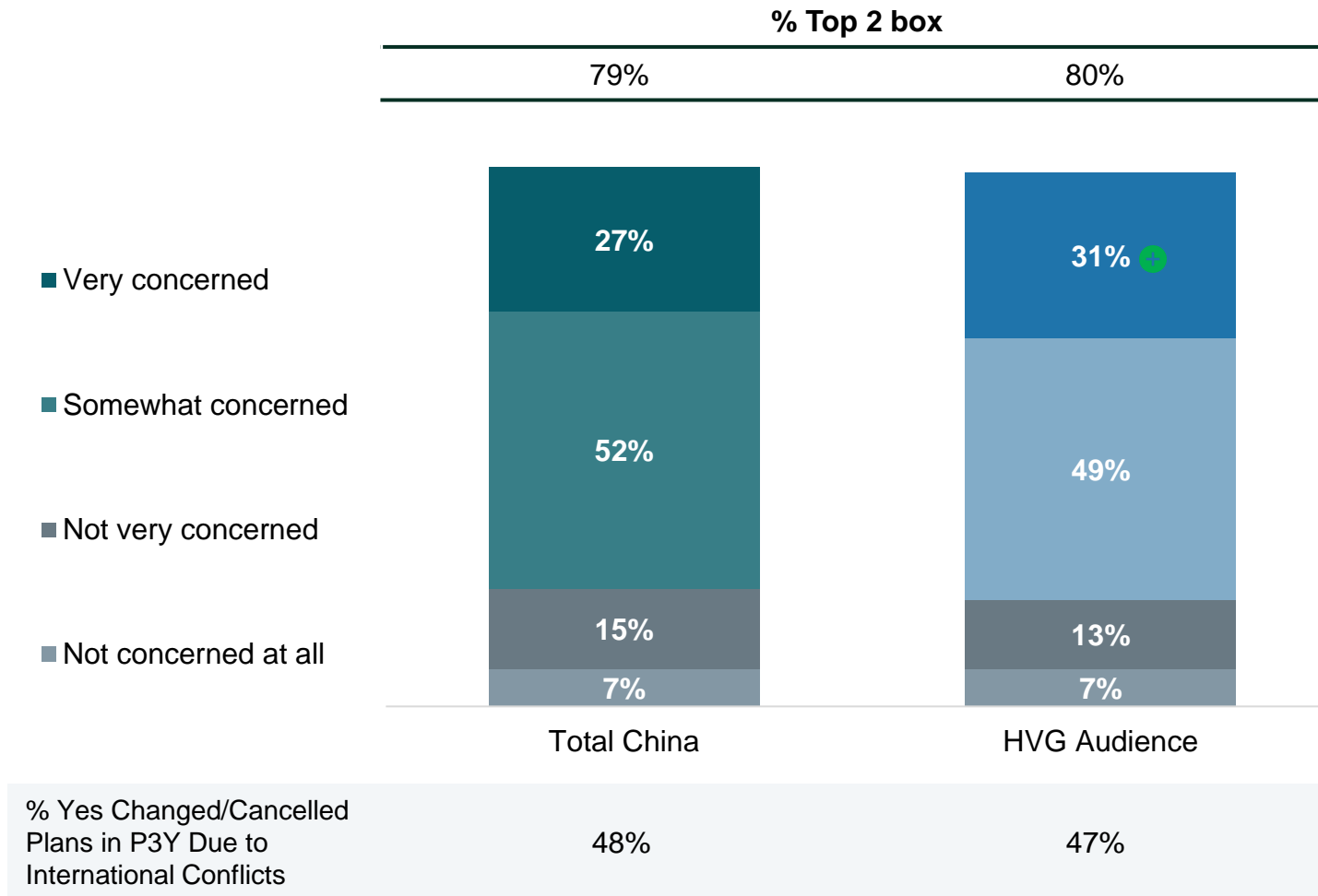
International Conflicts Description

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 pleasure travellers (past 3 years or next 2 years) (n=1112); HVG (n=415)
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?

China GTRP – December 2023

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

Usage of AI Tools to Plan Trips

- Yes
- No
- Don't know

Total China
- 56%
- 42%

HVG Audience
- 60% ⊕
- 39% ⊖

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

China GTRP – December 2023

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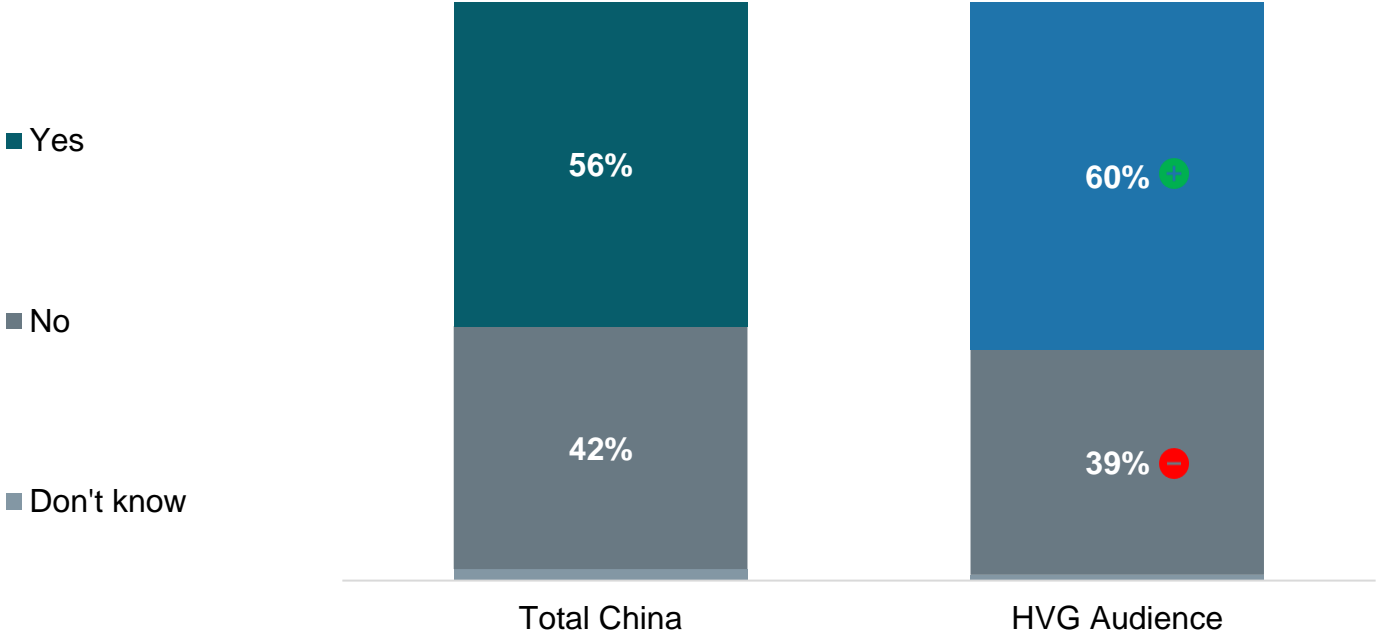
Seasonal Travel

Yellowknife
Northwest Territories

Preferred Time of Year for Holiday Trips

■ Total China   ■ HVG Audience

Month	Total China	HVG Audience
December	7%	6%
January	6%	6%
February	10%	10%
March	13%	16% ⊕
April	16%	19% ⊕
May	26%	29% ⊕
June	19%	19%
July	17%	17%
August	17%	18%
September	18%	18%
October	23%	25%
November	8%	6% ⊖
Don't know	0%	0% ⊖

	Total China	HVG Audience
Winter	17%	16%
Spring	47%	52% ⊕
Summer	44%	43%
Fall	38%	37%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

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

Interest in Winter Holidays

DESTINATION CANADA

% Extremely/somewhat interested (top 2 box)

89%	93% ⊕

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

Total China
- 36%
- 53%
- 9%

HVG Audience
- 44% ⊕
- 48% ⊖
- 6% ⊖

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 pleasure travellers (past 3 years or next 2 years) (n=1130); HVG (n=423)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**?

China GTRP – December 2023

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

Unaided Winter Destinations

■ Total China   ■ HVG Audience

Destination	Total China	HVG Audience
China	28%	24% ⊖
Japan	19%	20%
South Korea	15%	17%
Canada	**9%**	**11%**
Taiwan	5%	3% ⊖
United States	5%	5%
Australia	5%	7% ⊕
Switzerland	5%	5%
France	4%	3%
Thailand	3%	4%
Russia	3%	3%
United Kingdom	3%	4%
New Zealand	3%	2%

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 pleasure travellers (past 3 years or next 2 years) (n=1130); HVG (n=423)
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

China GTRP – December 2023

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

Motivators & Barriers for Winter Travel to Canada

Motivators for Winter Travel

■ Total China (n=651)   ■ HVG Audience (n=288)

Motivator	Total China	HVG Audience
There are specific activities I want to do in Canada that are available in these months	36%	36%
There are less crowds at the places I want to visit during these months	34%	35%
The weather is ideal at the places I want to visit during these months	33%	33%
There are places in Canada I'd only want to visit during these months	33%	35%
I am able to take a holiday during these months	31%	27% ⊖
Travel prices are cheaper during these months	31%	33%

Barriers for Winter Travel

■ Total China (n=1025)   ■ HVG Audience (n=396)

Barrier	Total China	HVG Audience
The weather is too cold at the places I want to visit during these months	28%	29%
I don't know enough about what activities are available during these months	24%	24%
I am unable to take a holiday during these months	22%	21%
The activities I want to do are not available in these months	22%	22%
There are other places I'd rather visit during these months	21%	18%
There are too many crowds at the places I want to visit during these months	20%	17%
My kids are in school and I don't want them to miss class	19%	20%
Travel prices are more expensive during these months	19%	16%
Nothing would prevent me from travelling to Canada during these months	6%	6%

Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?

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

China GTRP – December 2023

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

Interest in Winter Activities in Canada

% Somewhat/Very interested

■ Total China ■ HVG Audience

Activity	Total China	HVG Audience
Learning about Indigenous culture, traditions or history	90%	90%
Culinary or dining experiences	89%	90%
City sightseeing and experiences (e.g. city tours, markets, snowy streets)	88%	88%
Cultural attractions (e.g. art galleries, museums)	88%	87%
Northern lights	88%	89%
Winter festivals and events	88%	90% ⊕
Dog sledding	84%	86%
Ice skating	84%	84%
Cross-country skiing or snowshoeing	82%	84%
Downhill skiing or Snowboarding	81%	82%
Spas	80%	82%
Heli-skiing	79%	81%
Wilderness lodges	77%	77%

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1676); HVG (n=684)
E10. What is your level of interest in the following activities or experiences in Canada during the **winter season**?

China GTRP – December 2023

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

Interest in Fall Holidays

DESTINATION CANADA

% Extremely/somewhat interested (top 2 box)

93%	97% ➕

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

Total China: 41%, 51%, 7%

HVG Audience: 48% ➕, 49%, 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 pleasure travellers (past 3 years or next 2 years) (n=1074); HVG (n=405)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**?

China GTRP – December 2023

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

Unaided Fall Destinations

Total China **HVG Audience**

Destination	Total China	HVG Audience
China	34%	33%
Japan	18%	21%
South Korea	13%	14%
Canada	8%	11% ⊕
Taiwan	7%	5%
Thailand	6%	7%
United States	6%	7%
France	6%	5%
Australia	6%	5%
United Kingdom	3%	4%
New Zealand	3%	4%
Italy	3%	4%
Singapore	3%	4%

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 pleasure travellers (past 3 years or next 2 years) (n=1074); HVG (n=405)
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 East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

China GTRP – December 2023

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

Motivators & Barriers for Fall Travel to Canada

DESTINATION CANADA

Motivators for Fall Travel

■ Total China (n=922)   ■ HVG Audience (n=382)

Motivator	Total China	HVG Audience
The weather is ideal at the places I want to visit during these months	44%	45%
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	28%	25% ⊖
There are places in Canada I'd only want to visit during these months	28%	29%
There are less crowds at the places I want to visit during these months	26%	26%
Travel prices are cheaper during these months	26%	26%
It's school holidays so I can enjoy a family trip	25%	25%
Don't know	0%	1%

Barriers for Fall Travel

■ Total China (n=754)   ■ HVG Audience (n=302)

Barrier	Total China	HVG Audience
I am unable to take a holiday during these months	27%	28%
The weather is not ideal at the places I want to visit during these months	25%	26%
There are too many crowds at the places I want to visit during these months	25%	23%
There are other places I'd rather visit during these months	24%	23%
I don't know enough about what activities are available during these months	23%	23%
The activities I want to do are not available in these months	21%	19%
My kids are in school and I don't want them to miss class	20%	20%
Travel prices are more expensive during these months	20%	20%
Nothing would prevent me from travelling to Canada during these months	6%	4% ⊖

Base: Those in the dream to purchase stages of the path to purchase for Canada and underline(considering) visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?

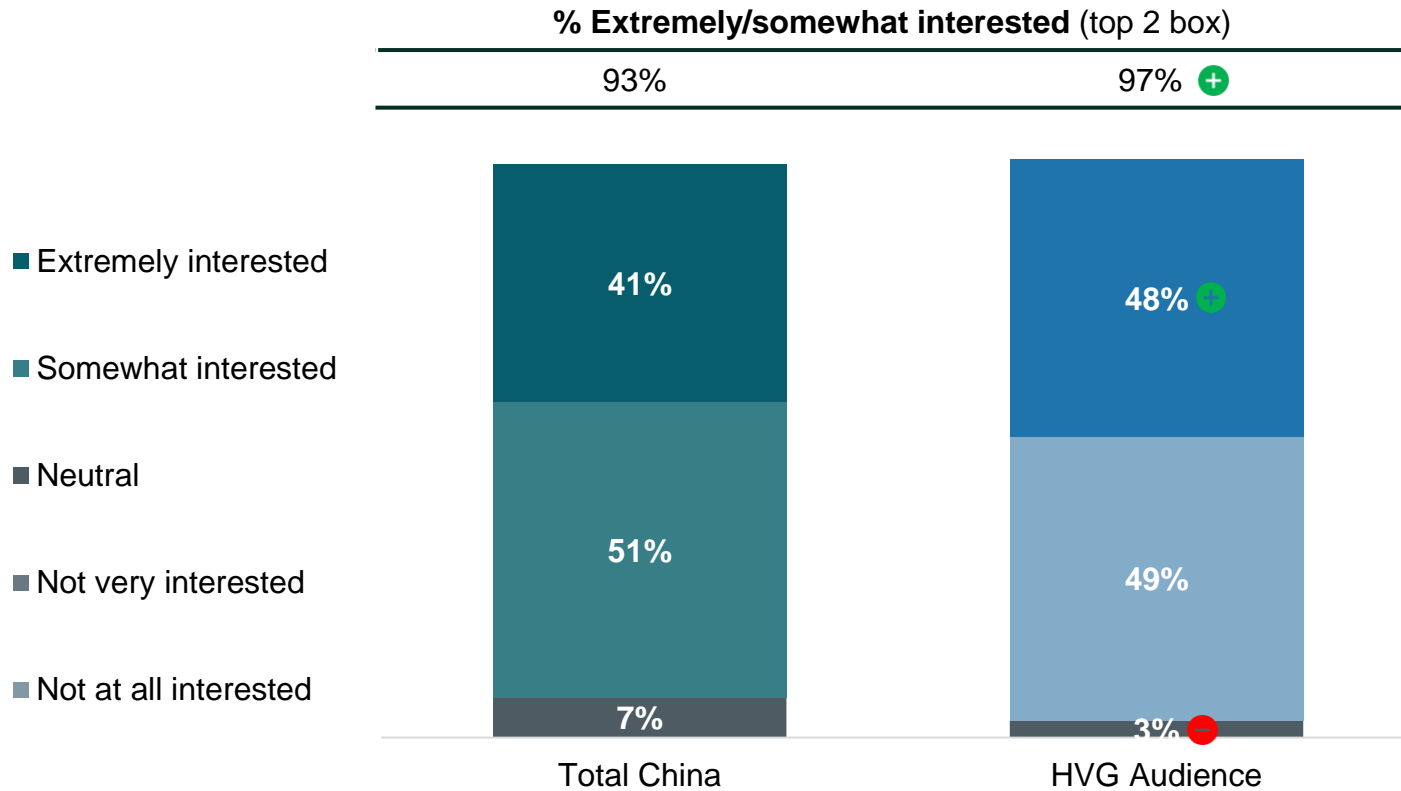Base: Those in the dream to purchase stages of the path to purchase for Canada and underline(not considering) visiting Canada or any province/territory in September, October or November
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September,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

China GTRP – December 2023

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

Interest in Fall Activities in Canada

% Somewhat/Very interested

■ Total China   ■ HVG Audience

Activity	Total China	HVG Audience
Culinary or dining experiences	89%	89%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	89%	88%
Autumn colours	88%	88%
City sightseeing and experiences (e.g. city tours, markets)	88%	89%
Cultural attractions (e.g. art galleries, museums)	88%	90% ⊕
Learning about Indigenous culture, traditions or history	88%	89%
Northern lights	88%	89%
Hiking or walking in nature	87%	87%
Polar bear viewing	87%	87%
Whale watching	87%	88%
Wildlife viewing (e.g. bears, moose, birds)	87%	87%
Self-guided driving tours or road trips	84%	85%
Train journeys	81%	81%
Wilderness lodges	80%	81%
Fishing or angling	79%	80%
Mountain biking	79%	80%
Spas	79%	80%

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1676); HVG (n=684)
E11. What is your level of interest in the following activities or experiences in Canada during the **autumn season**?

China GTRP – December 2023

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

Indigenous Tourism

Unaided Mentions – Indigenous Cultural & Tourism Activities

DESTINATION CANADA

Legend: ■ Total China ■ HVG Audience

Category	Total China	HVG Audience
Indigenous People & their culture	44%	44%
Eco tourism/Natural environment	17%	17%
Food & Drinks	13%	12%
Ceremonies and festivals	10%	10%
Exploring tourist places/attractions	9%	9%
Music events/ Shows/ Events	6%	6%
Historical buildings/churches	5%	3% ⊖
Interesting/Fun/Entertaining	4%	4%
Learning/ Gaining Knowledge	3%	4%
Various art and craft work/Aborginal art	3%	3%
Visiting Villages/Local people	2%	3%
Accommodation/Shelter	2%	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 pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?

China GTRP – December 2023

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

Unaided Indigenous Tourism Destinations

Total China **HVG Audience**

Destination	Total China	HVG Audience
China	47%	47%
South Korea	9%	10% ➕
Japan	8%	10%
Taiwan	6%	4% ➖
Canada	**4%**	**5%**
United States	4%	4%
Thailand	4%	4%
Australia	3%	4%
New Zealand	3%	4%
France	3%	3%
United Kingdom	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 pleasure travellers (past 3 years or next 2 years) (n=2204); HVG (n=828)
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 East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.
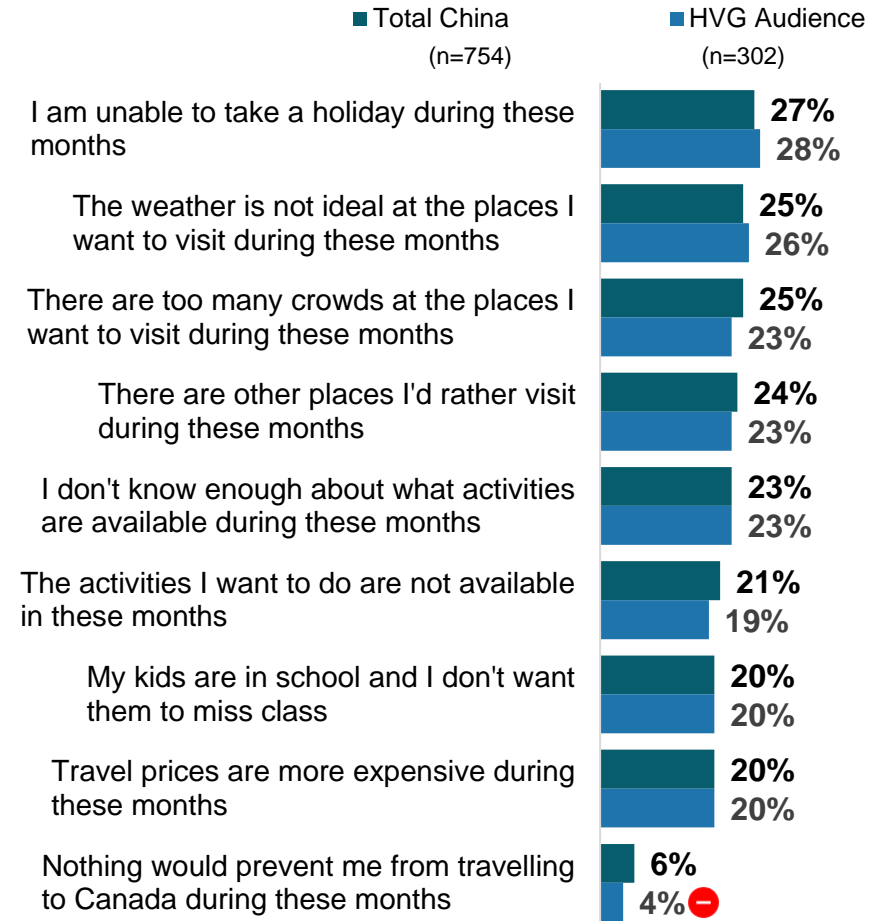
China GTRP – December 2023

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

Interest in Indigenous Cultural & Tourism Activities

% Somewhat/Very interested

■ Total China   ■ HVG Audience

Activity	Total China	HVG Audience
Attending an Indigenous Pow Wow, festival, event, or performance	89%	89%
Experiencing Indigenous food and drink	89%	89%
Visiting a museum, interpretation center or traditional Indigenous site	89%	89%
Visiting an Indigenous boutique or art/craft exhibition	88%	89%
Indigenous adventure or excursions in nature (kayak, heritage parks, northern lights, etc.)	87%	87%
Learning about Indigenous ways of life by visiting an Indigenous community	87%	88%
Learning about Indigenous ways of life through storytelling or connecting with Indigenous Elders	87%	88%
Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)	87%	86%
Hunting and fishing activity with an Indigenous outfitter	85%	87% ⊕
Learning about residential schools and reconciliation with Indigenous peoples	85%	87%
Visiting remote northern Indigenous communities	84%	85%

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=1676); HVG (n=684)
E12. [DESCRIPTION] What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada?

China GTRP – December 2023

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

Most Recent Trip

Lake Louise
Alberta

DESTINATION CANADA

Main Purpose of Recent Trip

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

■ Total travellers (n=1654) ■ Total HVG travellers (n=743)

Purpose	Total travellers	HVG travellers
Holiday	52%	48% ⊖
Combined business / personal reasons	14%	16%
Personal event (e.g., wedding, funeral)	13%	13%
Visit family and friends	12%	14% ⊕
Education	8%	7%
Other	1%	1%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654) ■ Travellers to Canada (n=743)

Purpose	Total travellers	Travellers to Canada
Holiday	52%	56% ⊕
Combined business / personal reasons	14%	15%
Personal event (e.g., wedding, funeral)	13%	12%
Visit family and friends	12%	10%
Education	8%	6% ⊖
Other	1%	0%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
F2. What was the main purpose of this trip? (Select one)

China 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 (n=861)   ■ Total HVG travellers (n=358)

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

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=861)   ■ Travellers to Canada (n=348)

Factor	Total travellers	Travellers to Canada
Offered cultural experiences I am interested in	25%	25%
Opportunity to relax, unwind, and decompress	25%	26%
It was a safe place to visit	23%	26%
Offered city experiences I am interested in	23%	23%
Offered outdoor experiences I am interested in	22%	28% +
It was somewhere I always wanted to visit	20%	24% +
Offered culinary activities I am interested in (e.g. food or winery tour)	20%	25% +
Was a place where I could gain a new perspective on my world	20%	22%
My friends or family recommended it	18%	18%
Was a great family destination	18%	18%
It fit my travel budget	17%	19%
Was a destination that offered eco-friendly travel activities	17%	20%
Is a destination that offers socially responsible travel options that support the local community	16%	19%
Saw a great trip itinerary	15%	17%
I wanted to visit with my friends or family	14%	13%
Offered travel activities I am interested in (e.g. cruise, train, or RV trips)	14%	18% +
Saw it on a television program or movie	14%	14%
Was a place where I could pursue my personal passions	14%	16%
Saw a great deal	13%	14%
Was recommended by a travel agent or tour operator	13%	15%
Offered sports or outdoor activities I wanted to do (e.g. ski, golf)	12%	16% +
Had visited before and wanted to return	11%	12%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Took a holiday (n=861); HVG (n=358); Travellers to Canada (n=348)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

China GTRP – December 2023

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

Nights Spent During Recent Trip

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

■ Total travellers (n=1654)   ■ Total HVG travellers (n=743)

Nights	Total travellers	Total HVG travellers
1 night	3%	2%
2-3 nights	44%	36% ⊖
4-6 nights	40%	42%
7-13 nights	11%	16% ⊕
14+ nights	2%	3% ⊕

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)   ■ Travellers to Canada (n=621)

Nights	Total travellers	Travellers to Canada
1 night	3%	4%
2-3 nights	44%	40% ⊖
4-6 nights	40%	43%
7-13 nights	11%	12%
14+ nights	2%	1%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
F4. How many nights did you spend in this destination?

China GTRP – December 2023

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

Travel Party of Recent Trip

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

■ Total travellers (n=1654)　■ Total HVG travellers (n=743)

Travel Party	Total travellers	Total HVG travellers
Spouse or partner	42%	43%
Alone/solo	24%	22%
Friend(s)	22%	20%
Business associates or colleagues	10%	12%
Child (under 18 years old)	8%	10% ⊕
Parent(s)	7%	8%
Child (18 years old or older)	4%	6% ⊕
Grandparent(s)	1%	1%
Other family members	5%	4%

Spouse/Partner ONLY
Total: 26%
HVGs: 25%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)　■ Travellers to Canada (n=621)

Travel Party	Total travellers	Travellers to Canada
Spouse or partner	42%	44%
Alone/solo	24%	24%
Friend(s)	22%	21%
Business associates or colleagues	10%	10%
Child (under 18 years old)	8%	7%
Parent(s)	7%	7%
Child (18 years old or older)	4%	4%
Grandparent(s)	1%	0%
Other family members	5%	4%

Spouse/Partner ONLY
Total: 26%
Canada: 29% ⊕

China GTRP – December 2023

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
F5. With whom did you travel on this trip? (Select all that apply)

⊕ / ⊖ = significantly higher/lower result (vs. Total)
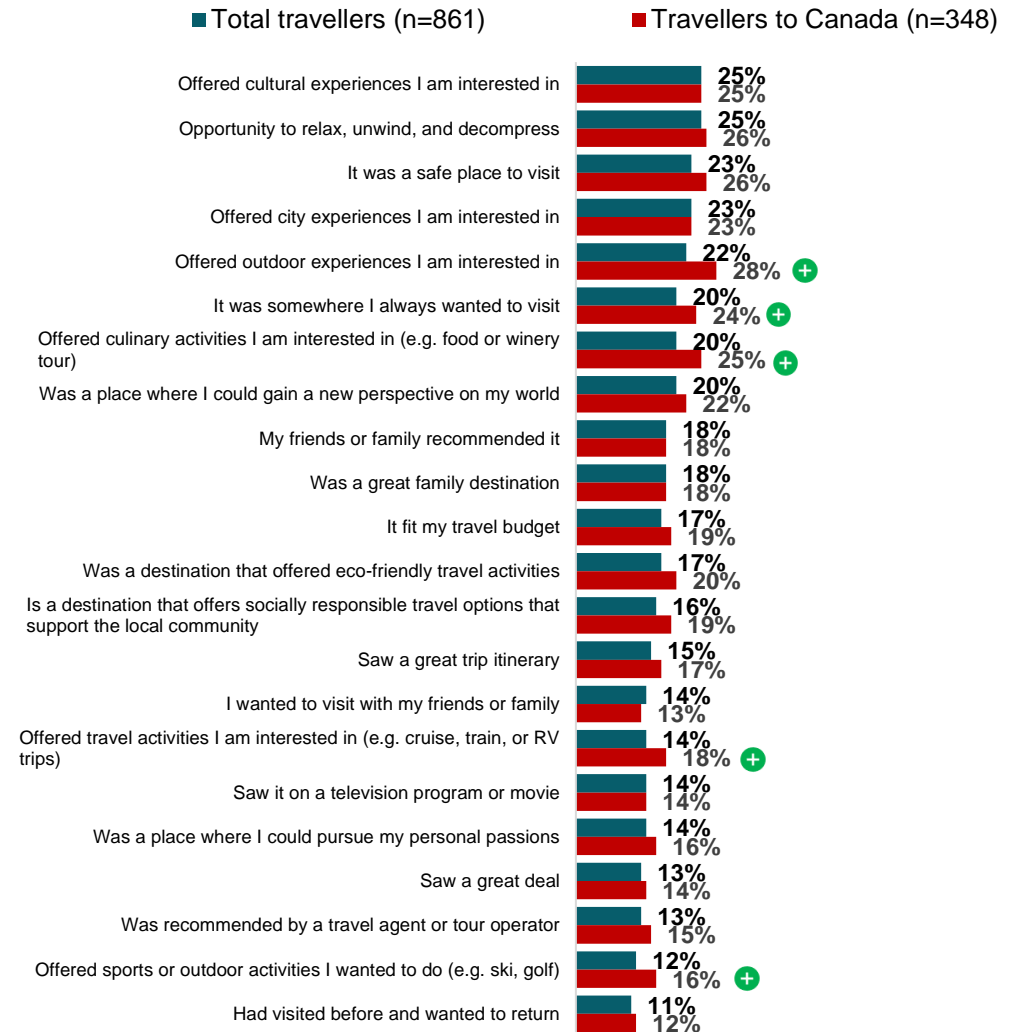
Amount Spent for Recent Trip

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

■ Total travellers (n=1654) ■ Total HVG travellers (n=743)

Range	Total travellers	HVG travellers
Less than ¥2,500	0%	0%
¥2,501 to ¥5,500	0%	0%
¥5,501 to ¥8,000	3%	1% ➖
¥8,001 to ¥10,500	4%	1% ➖
¥10,501 to ¥16,000	8%	4% ➖
¥16,001 to ¥21,500	16%	8% ➖
¥21,501 to ¥26,500	17%	12% ➖
¥26,501 to ¥37,000	17%	17%
¥37,001 to ¥53,500	16%	22% ➕
¥53,501 to ¥80,000	10%	17% ➕
¥80,001 or more	9%	18% ➕

Average Spent
Total: ¥37,845
HVG: ¥51,024 ➕

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654) ■ Travellers to Canada (n=621)

Range	Total travellers	Travellers to Canada
Less than ¥2,500	0%	0%
¥2,501 to ¥5,500	0%	0%
¥5,501 to ¥8,000	3%	5% ➕
¥8,001 to ¥10,500	4%	4%
¥10,501 to ¥16,000	8%	7%
¥16,001 to ¥21,500	16%	14%
¥21,501 to ¥26,500	17%	15%
¥26,501 to ¥37,000	17%	18%
¥37,001 to ¥53,500	16%	18%
¥53,501 to ¥80,000	10%	11%
¥80,001 or more	9%	9%

Average Spent
Total: ¥37,845
Canada: ¥38,106

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
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.

Payment Methods for Recent Trip

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

■ Total travellers (n=1654)　■ Total HVG travellers (n=743)

	Total travellers	Total HVG travellers
Credit card	22%	22%
Debit or bank card	22%	22%
Cash	22%	22%
Mobile Payment	28%	28%
Other	6%	6%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)　■ Travellers to Canada (n=621)

	Total travellers	Travellers to Canada
Credit card	22%	21%
Debit or bank card	22%	23%
Cash	22%	22%
Mobile Payment	28%	27%
Other	6%	6%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
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%).

China GTRP – December 2023

Travel Agents/Tour Operator Usage For Recent Trip

DESTINATION CANADA

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

■ Total travellers (n=1238) ■ Total HVG travellers (n=572)

	Total	HVG
Booking accommodations	38%	41%
Booking flights	36%	39% ⊕
Booking activities to see and do	33%	35%
Researching accommodations	33%	35%
Researching potential travel destinations	33%	33%
Researching activities to see and do	31%	33%
Researching flights	31%	35% ⊕
Researching ground transportation	28%	28%
Booking ground transportation	27%	29%

% Used a travel agent
Total: 75%
HVG: 77%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1238) ■ Travellers to Canada (n=463)

	Total	Canada
Booking accommodations	38%	41%
Booking flights	36%	38%
Booking activities to see and do	33%	34%
Researching accommodations	33%	36%
Researching potential travel destinations	33%	33%
Researching activities to see and do	31%	32%
Researching flights	31%	33%
Researching ground transportation	28%	30%
Booking ground transportation	27%	30% ⊕

% Used a travel agent
Total: 75%
Canada: 75%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=1238); HVG (n=572); Travellers to Canada (n=463)
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include CITS, CYTS, or Utour, they do not include online booking engines like Ctrip, Qunar, Fliggy or TUNIU. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
F10. Which of the following did a travel agent or tour operator help you with?

China GTRP – December 2023

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

Organized Group Tour Usage For Recent Trip

DESTINATION CANADA

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

■ Total travellers (n=1654)   ■ Total HVG travellers (n=743)

Yes, my whole trip was part of an organized group tour
- 40%
- 44% ⊕

Yes, a portion of my trip was part of an organized group tour
- 38%
- 32% ⊖

No
- 22%
- 23%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)   ■ Travellers to Canada (n=621)

Yes, my whole trip was part of an organized group tour
- 40%
- 38%

Yes, a portion of my trip was part of an organized group tour
- 38%
- 38%

No
- 22%
- 24%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
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?

China 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=1654)   ■ Total HVG travellers (n=743)

Travel agent/tour operator (NET)	**72%** / **73%**
Booked online with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	**39%** / **40%**
Booked in-person with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	**33%** / **36%** ➕
Booked on the phone with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	**32%** / **30%**
Booked online through an online booking engine (e.g. Ctrip, Qunar, Fliggy or TUNIU)	**44%** / **44%**
Booked directly with the airline(s)	**24%** / **22%**
Booked by someone else in the travel party	**12%** / **10%**

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)   ■ Travellers to Canada (n=621)

Travel agent/tour operator (NET)	**72%** / **72%**
Booked online with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	**39%** / **41%**
Booked in-person with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	**33%** / **33%**
Booked on the phone with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	**32%** / **31%**
Booked online through an online booking engine (e.g. Ctrip, Qunar, Fliggy or TUNIU)	**44%** / **48%** ➕
Booked directly with the airline(s)	**24%** / **25%**
Booked by someone else in the travel party	**12%** / **11%**

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
F12. How did you book your <u>flight</u> for this trip? (Select all that apply)

China GTRP – December 2023

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

Booking Accommodations For Recent Trip

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

■ Total travellers (n=1654)   ■ Total HVG travellers (n=743)

	Total travellers	Total HVG travellers
Travel agent/tour operator (NET)	65%	64%
Booked online with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	31%	31%
Booked in-person with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	30%	31%
Booked on the phone with a travel agent/tour operator (e.g. CITS, CYTS, or Utour)	26%	26%
Booked online through an online booking engine (e.g. Ctrip, Qunar, Fliggy or TUNIU)	39%	41%
Booked through accommodation sharing services website (e.g. Airbnb)	22%	21%
Booked through a visitors information centre at the destination	21%	21%
Booked directly with the lodging/accommodation establishment	20%	19%
Booked by someone else in the travel party	6%	5%
Did not need to book any accommodation	1%	1%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)   ■ Travellers to Canada (n=621)

	Total travellers	Travellers to Canada
Travel agent/tour operator (NET)	65%	66%
Booked online with a travel agent/tour operator (e.g. CITS, CYTS, or Utour	31%	34%
Booked in-person with a travel agent/tour operator (e.g. CITS, CYTS, or Utour	30%	29%
Booked on the phone with a travel agent/tour operator (e.g. CITS, CYTS, or Utour	26%	26%
Booked online through an online booking engine (e.g. Ctrip, Qunar, Fliggy or TUNIU)	39%	42% ⊕
Booked through accommodation sharing services website (e.g. Airbnb)	22%	22%
Booked through a visitors information centre at the destination	21%	24% ⊕
Booked directly with the lodging/accommodation establishment	20%	17% ⊖
Booked by someone else in the travel party	6%	5%
Did not need to book any accommodation	1%	1%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
F13. How did you book your accommodation for this trip? (Select all that apply)

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

Type of Accommodations For Recent Trip

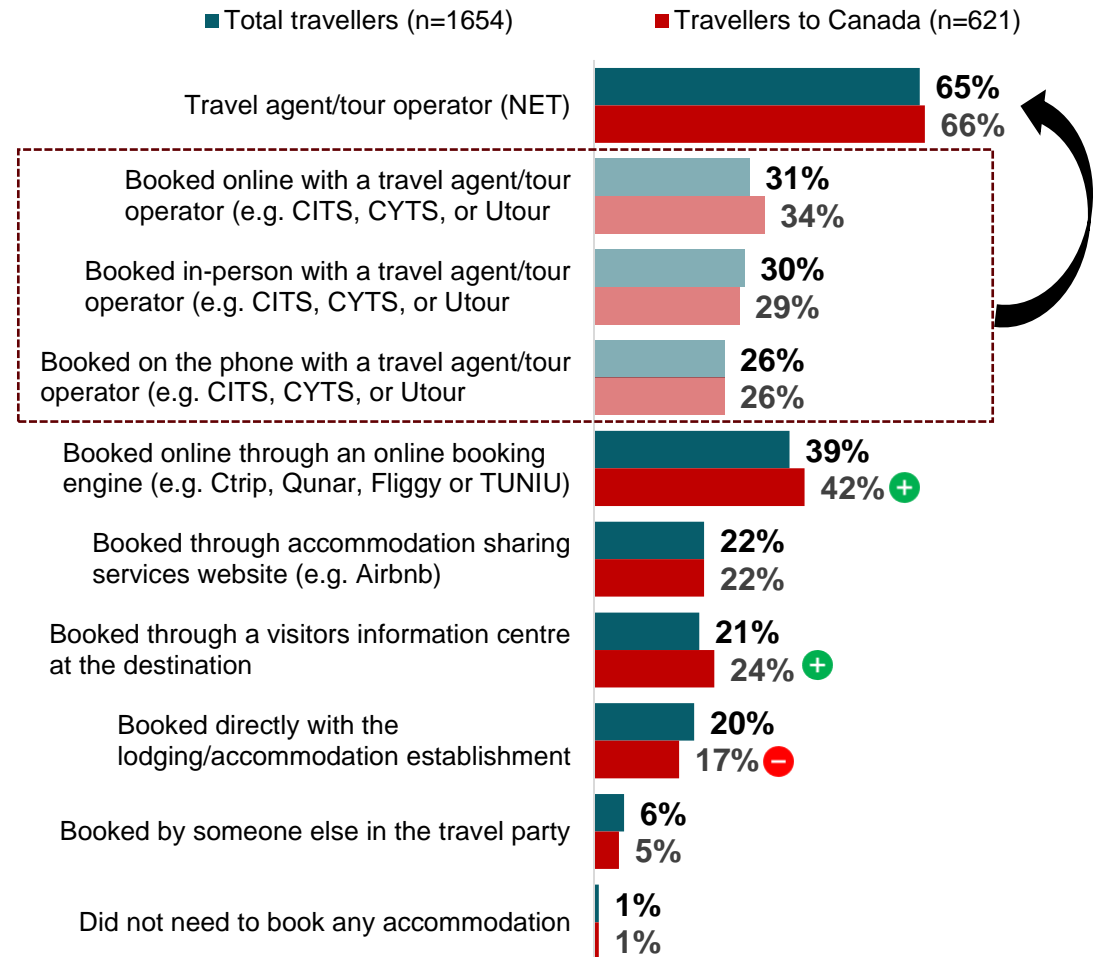## Total Travellers to Any Destination vs. HVG Travellers to Any Destination

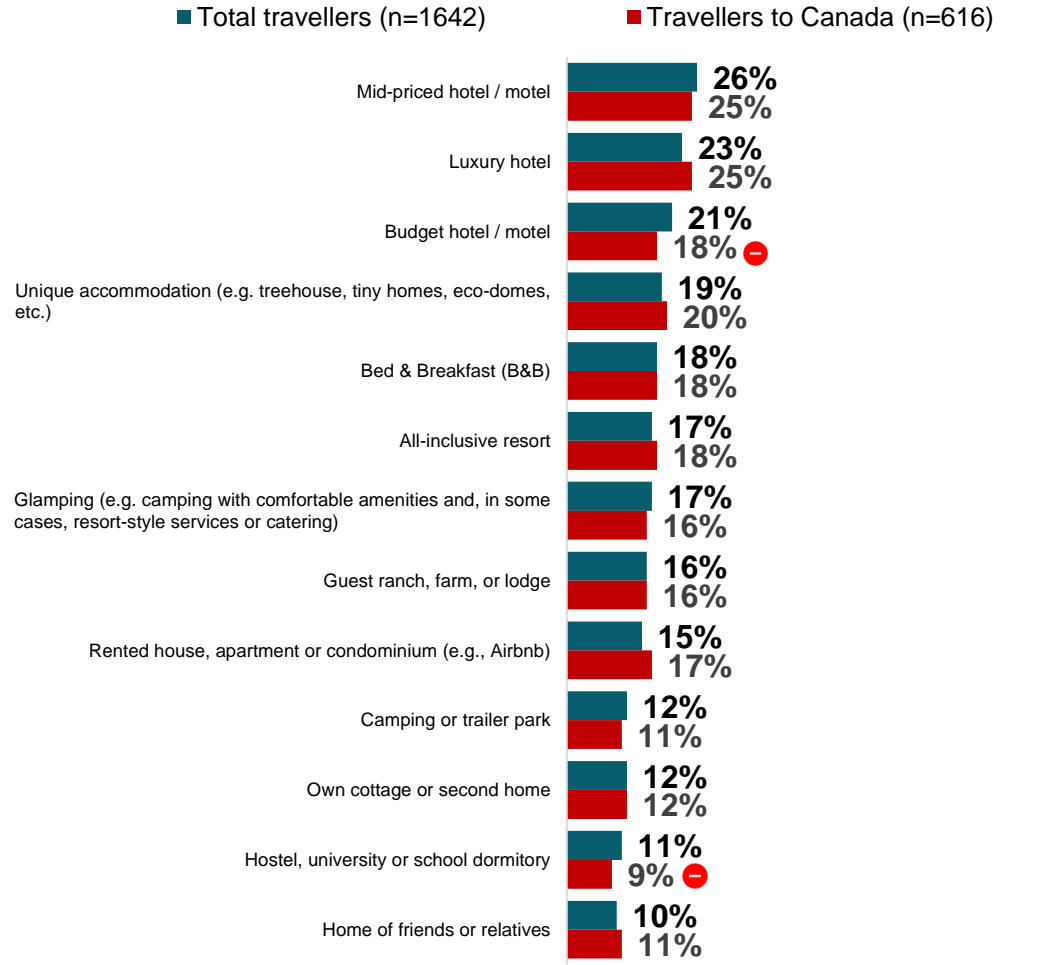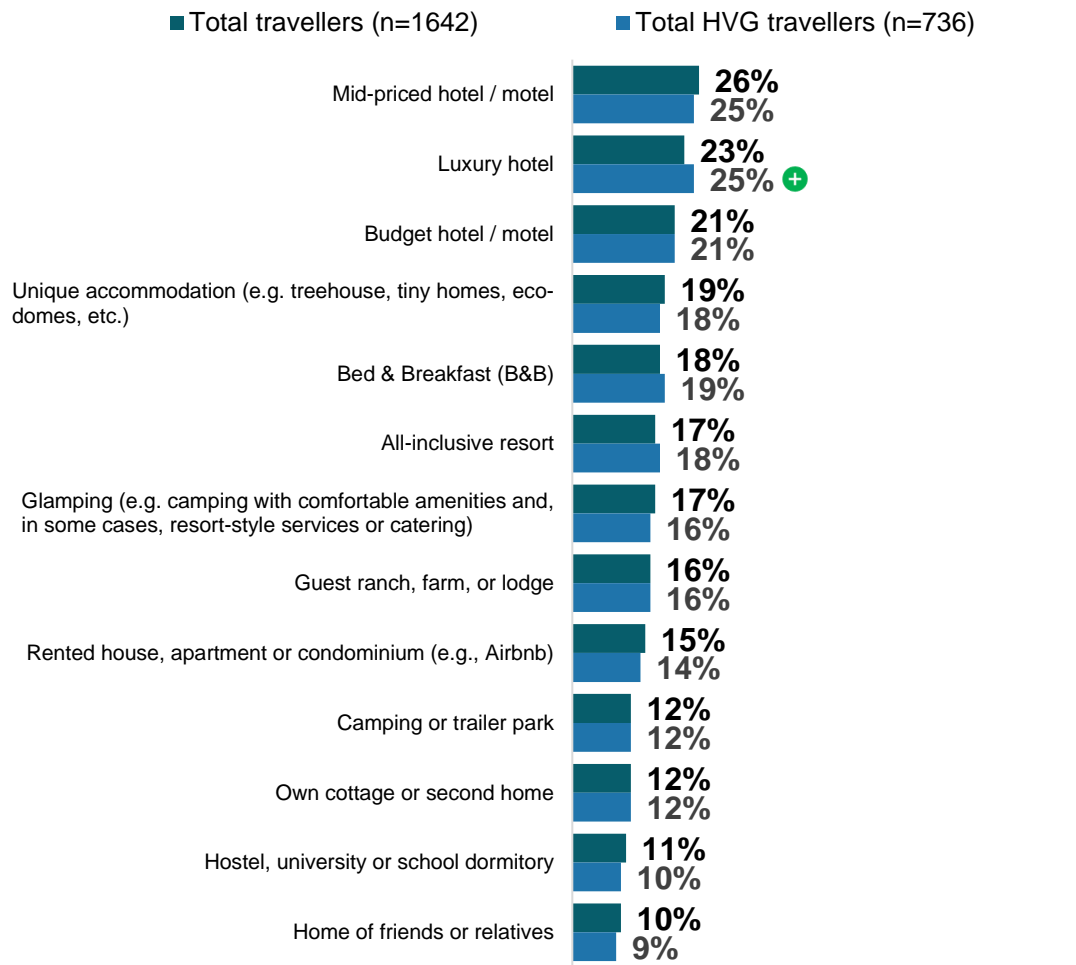■ Total travellers (n=1642)   ■ Total HVG travellers (n=736)

Accommodation	Total	HVG
Mid-priced hotel / motel	**26%**	25%
Luxury hotel	**23%**	25% +
Budget hotel / motel	**21%**	21%
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	**19%**	18%
Bed & Breakfast (B&B)	**18%**	19%
All-inclusive resort	**17%**	18%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	**17%**	16%
Guest ranch, farm, or lodge	**16%**	16%
Rented house, apartment or condominium (e.g., Airbnb)	**15%**	14%
Camping or trailer park	**12%**	12%
Own cottage or second home	**12%**	12%
Hostel, university or school dormitory	**11%**	10%
Home of friends or relatives	**10%**	9%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1642)   ■ Travellers to Canada (n=616)

Accommodation	Total	Canada
Mid-priced hotel / motel	**26%**	25%
Luxury hotel	**23%**	25%
Budget hotel / motel	**21%**	18% −
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	**19%**	20%
Bed & Breakfast (B&B)	**18%**	18%
All-inclusive resort	**17%**	18%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	**17%**	16%
Guest ranch, farm, or lodge	**16%**	16%
Rented house, apartment or condominium (e.g., Airbnb)	**15%**	17%
Camping or trailer park	**12%**	11%
Own cottage or second home	**12%**	12%
Hostel, university or school dormitory	**11%**	9% −
Home of friends or relatives	**10%**	11%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation (n=1642); HVG (n=736); Travellers to Canada (n=616)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

China GTRP – December 2023

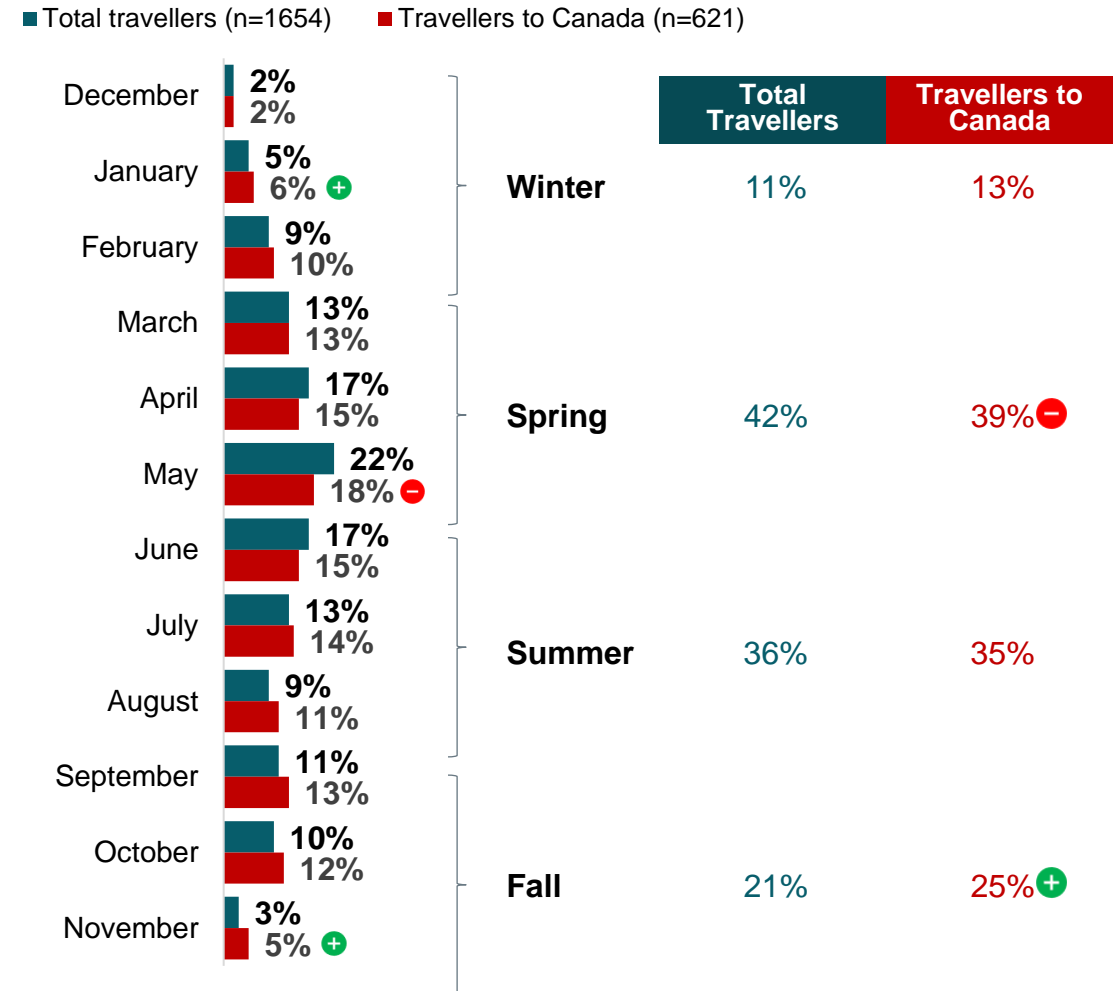+ / − = significantly higher/lower result (vs. Total)

Time of Year Travelled For Recent Trip

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

■ Total travellers (n=1654)   ■ Total HVG travellers (n=743)

	Total Travellers	HVG Travellers
December	2% / 2%	
January	5% / 4%	
February	9% / 8%	
Winter	**11%**	**10%**
March	13% / 13%	
April	17% / 19% ⊕	
May	22% / 23%	
Spring	**42%**	**42%**
June	17% / 16%	
July	13% / 12%	
August	9% / 11%	
Summer	**36%**	**34%**
September	11% / 12%	
October	10% / 13% ⊕	
November	3% / 4%	
Fall	**21%**	**25%** ⊕

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=1654)   ■ Travellers to Canada (n=621)

	Total Travellers	Travellers to Canada
December	2% / 2%	
January	5% / 6% ⊕	
February	9% / 10%	
Winter	**11%**	**13%**
March	13% / 13%	
April	17% / 15%	
May	22% / 18% ⊖	
Spring	**42%**	**39%** ⊖
June	17% / 15%	
July	13% / 14%	
August	9% / 11%	
Summer	**36%**	**35%**
September	11% / 13%	
October	10% / 12%	
November	3% / 5% ⊕	
Fall	**21%**	**25%** ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=1654); HVG (n=743); Travellers to Canada (n=621)
F15. Which time of the year did you take this trip? (Select all that apply)

China GTRP – December 2023

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

Most Recent Trip to Canada
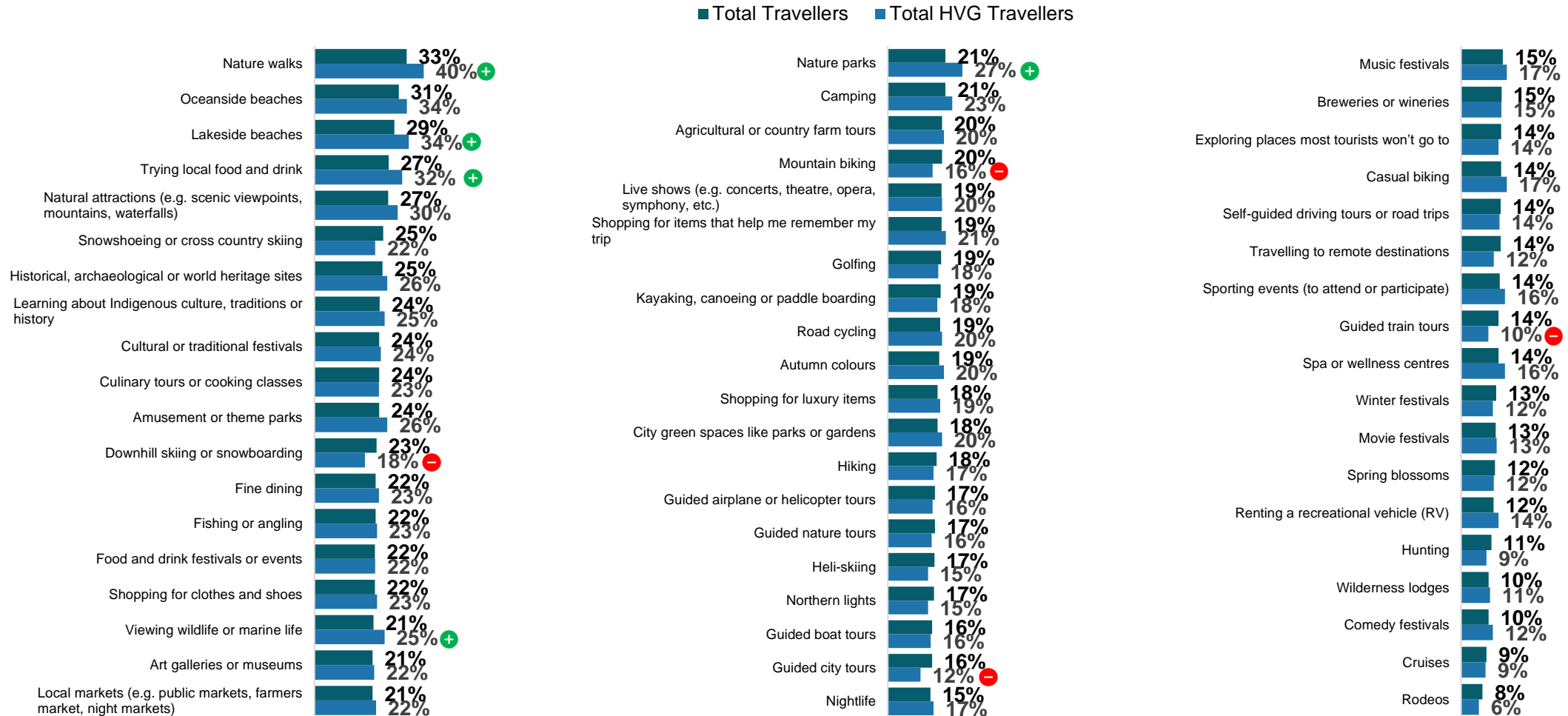
Niagara Falls
Ontario

Top 10 Activities Participated in During Recent Trip to Canada

Total Travellers (n=621)	Total HVG Travellers (n=295)
Nature walks	Nature walks ⊕
Oceanside beaches	Lakeside beaches ⊕
Lakeside beaches	Oceanside beaches
Trying local food and drink	Trying local food and drink ⊕
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Snowshoeing or cross country skiing	Nature parks ⊕
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Learning about Indigenous culture, traditions or history	Amusement or theme parks
Cultural or traditional festivals	Learning about Indigenous culture, traditions or history
Culinary tours or cooking classes	Viewing wildlife or marine life ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=621); HVG (n=295)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

Activities Participated in During Recent Trip to Canada

DESTINATION CANADA

Total Travellers ■ **Total HVG Travellers**

Activity	Total Travellers	Total HVG Travellers
Nature walks	33%	40% ⊕
Oceanside beaches	31%	34%
Lakeside beaches	29%	34% ⊕
Trying local food and drink	27%	32% ⊕
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	27%	30%
Snowshoeing or cross country skiing	25%	22%
Historical, archaeological or world heritage sites	25%	26%
Learning about Indigenous culture, traditions or history	24%	25%
Cultural or traditional festivals	24%	24%
Culinary tours or cooking classes	24%	23%
Amusement or theme parks	24%	26%
Downhill skiing or snowboarding	23%	18% ⊖
Fine dining	22%	23%
Fishing or angling	22%	23%
Food and drink festivals or events	22%	22%
Shopping for clothes and shoes	22%	23%
Viewing wildlife or marine life	21%	25% ⊕
Art galleries or museums	21%	22%
Local markets (e.g. public markets, farmers market, night markets)	21%	22%

Activity	Total Travellers	Total HVG Travellers
Nature parks	21%	27% ⊕
Camping	21%	23%
Agricultural or country farm tours	20%	20%
Mountain biking	20%	16% ⊖
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	19%	20%
Shopping for items that help me remember my trip	19%	21%
Golfing	19%	18%
Kayaking, canoeing or paddle boarding	19%	18%
Road cycling	19%	20%
Autumn colours	19%	20%
Shopping for luxury items	18%	19%
City green spaces like parks or gardens	18%	20%
Hiking	18%	17%
Guided airplane or helicopter tours	17%	16%
Guided nature tours	17%	16%
Heli-skiing	17%	15%
Northern lights	17%	15%
Guided boat tours	16%	16%
Guided city tours	16%	12% ⊖
Nightlife	15%	17%

Activity	Total Travellers	Total HVG Travellers
Music festivals	15%	17%
Breweries or wineries	15%	15%
Exploring places most tourists won't go to	14%	14%
Casual biking	14%	17%
Self-guided driving tours or road trips	14%	14%
Travelling to remote destinations	14%	12%
Sporting events (to attend or participate)	14%	16%
Guided train tours	14%	10% ⊖
Spa or wellness centres	14%	16%
Winter festivals	13%	12%
Movie festivals	13%	13%
Spring blossoms	12%	12%
Renting a recreational vehicle (RV)	12%	14%
Hunting	11%	9%
Wilderness lodges	10%	11%
Comedy festivals	10%	12%
Cruises	9%	9%
Rodeos	8%	6%

China GTRP – December 2023

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=621); HVG (n=295)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

Canadian Destinations Visited During Recent Trip

DESTINATION CANADA

Total Travellers

Total HVG Travellers

Northwest Territories
1%	2%
1%	2%	Yellowknife
1%	2%	Inuvik
-	1%	Other – NWT

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

Quebec
22%	23%
13%	13%	Montréal
12%	14%	Québec City
13%	15%	Mont Tremblant
2%	3%	Other – QC

Yukon
4%	5%
3%	4%	Whitehorse
2%	3%	Dawson City
2%	2%	Other – YT

Newfoundland & Labrador
9%	11% +
6%	7%	St. John's
5%	6%	Other - NL

British Columbia
19%	25% +
11%	15% +	Rocky Mountains
14%	19% +	Vancouver
9%	11%	Victoria
4%	5%	Whistler
3%	4%	Okanagan
1%	1%	Other – BC

Prince Edward Island
12%	10%
9%	8%	Charlottetown
7%	6%	Other - PEI

New Brunswick
13%	14%
6%	8%	Fredericton
8%	8%	Saint John
5%	4%	Other - NB

Alberta
19%	21%
10%	14% +	Rocky Mountains
8%	9%	Calgary
8%	10% +	Edmonton
6%	7%	Banff
6%	8%	Jasper
2%	2%	Other – AB

Nova Scotia
13%	14%
9%	10%	Halifax
8%	8%	Cape Breton
3%	4%	Other - NS

Saskatchewan
23%	25%
13%	14%	Regina
13%	15%	Saskatoon
9%	9%	Other – SK

Manitoba
25%	25%
15%	15%	Winnipeg
15%	17%	Churchill
8%	6%	Other – MB

Ontario
30%	32%
13%	16% +	Ottawa
15%	15%	Niagara Falls
12%	16% +	Toronto
9%	11%	Muskoka
4%	3%	Other – ON

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=621); HVG (n=295)
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)

China GTRP – December 2023

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

Number of Visits Ever & Time of Year Visited Canada

Number of Visits Ever — bar chart (Total Travellers vs Total HVG Travellers):

- 1 time: Total Travellers 32%, Total HVG Travellers 34%
- 2 times: Total Travellers 23%, Total HVG Travellers 21%
- 3+ times: Total Travellers 45%, Total HVG Travellers 45%

Time of Year Visited Canada (Total Travellers vs Total HVG Travellers):

- December: 3% / 4%
- January: 5% / 5%
- February: 8% / 9%
- March: 14% / 17% ⊕
- April: 17% / 18%
- May: 17% / 19%
- June: 17% / 17%
- July: 15% / 13%
- August: 12% / 12%
- September: 13% / 15%
- October: 11% / 14% ⊕
- November: 4% / 5%
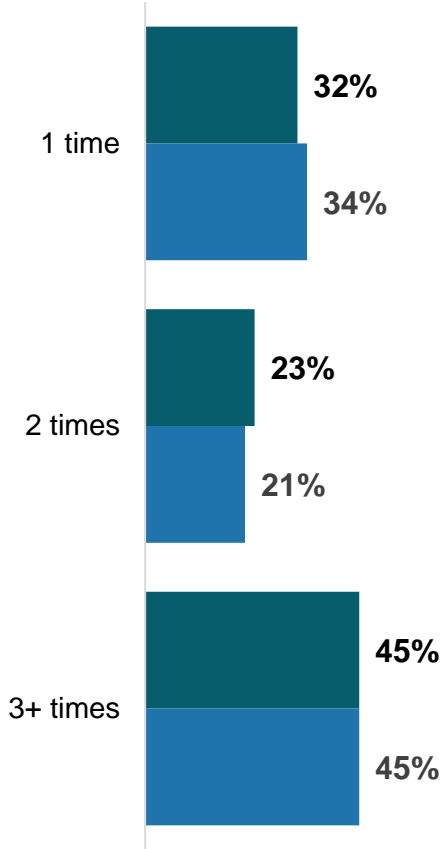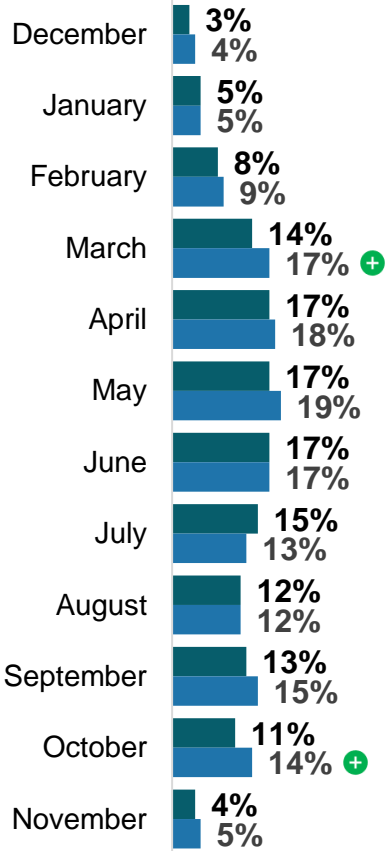
Season	Total Travellers	Total HVG Travellers
Winter	13%	14%
Spring	42%	44%
Summer	39%	36%
Fall	26%	30% ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=1111); HVG (n=549)
F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=1229); HVG (n=589)

China GTRP – December 2023

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

Demographics

	All Long-haul Travellers *(n=2204)*	HVG Audience *(n=828)*
Gender		
Male	56%	55%
Female	44%	45%
Age		
18 to 34	36%	31% 🔴
35 to 54	44%	45%
55 or older	20%	24% 🟢
Children in household under the age of 18		
Yes	57%	57%
Employed		
Yes	90%	82% 🔴
Household Income (Monthly)		
Under 6,001 RMB	5%	3% 🔴
6,001 RMB to 10,000	16%	3% 🔴
10,001 RMB to 30,000	40%	7% 🔴
30,001 RMB or more	39%	87% 🟢

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

THANK YOU

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

DESTINATION CANADA

CANADIAN TOURISM DATA collective