CONFIDENTIAL

FRANCE STRATEGIC REPORT

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

DESTINATION CANADA

CANADIAN TOURISM DATA collective

Focus of This Report

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

Study Overview: France Market

DESTINATION CANADA

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 40,000€+ household income per year or are retired.

Timing of Fieldwork

December 13th – 22nd 2023

Geographical Definition
for Qualified Trips

Outside of: Europe, North Africa and the Mediterranean

Sample Distribution

Sample distribution:	**National**
High Value Guest (HVG) Audience:	**331**
Other travellers:	**1173**
Total sample size:	**1504**

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

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

Key Insights

Travel Outlook & Trends

- Both **international** and **domestic** planned vacations **increased** year-over-year in 2023, with international plans experiencing a 15-percentage point post-pandemic surge in 2023 vs. 2021
- **Domestic holidays** are taken slightly more frequently than international holidays among **total French travellers**. However, **HVGs** exhibit a higher preference for **international holidays**. Combining personal and business travel or opting for remote work during vacations is not popular
- **Travel demand** is highest in the **Summer and Fall months**, when ~**12M** and **10M** travel in these seasons respectively
- French travellers, HVGs, and visitors to Canada typically favor **direct flight bookings with airlines**. However, when it comes to accommodations, booking through a **travel agent or tour operator** is much more popular
- **Two-thirds** of French travellers **worry about extreme weather**, but less than two in ten, changed plans in the past three years. **Concerns about international conflicts are more evident** among French travellers, with about a quarter having changed plans due to international conflicts or unrest

Canada vs. Competitive Set

- In 2023, Canada **outperformed** other destinations among French travellers, enjoying the **1st** position in seven out of eight metrics and ranking in the top two for all metrics. Scores increased for positive reputation and overall destination health
- **Canada leads** all competitive destinations on **NPS** among total travellers but falls slightly behind **Australia** and **Iceland** among HVGs. Past visitors during Winter have the most favourable NPS, followed by the Fall
- Canada's immediate potential for the **next two years** is **6.9M** visitors, including **2.1M** HVGs. Quebec's year-round appeal is apparent, given the cultural and linguistic connections, making it a frontrunner in popularity over other Canadian provinces
- Canada excels in ***safety***, ***being a place to avoid surprises***, ***environmental friendliness***, and ***social responsibility***
- Among the **brand value statements**, **Canada dominates on almost all statements** with one weakness in **distinctive identity**, which is a shared strength between China, India, and Japan

Key Insights

Key Drivers & Opportunities

- The **top drivers of consideration** are: *being a place to visit with **friends/family** and **being proud to tell people I have visited*** among total French travellers and HVG audience
- **Secondary drivers** among total travellers include: *socially responsible, and being a place to avoid surprises*
- HVGs are also driven by *cultural experiences and a great city atmosphere*
- **All top drivers represent white spaces** that no destination owns, presenting **key opportunity areas for Canada** to focus on
- There is **also an opportunity** to drive consideration to visit by **boosting perceptions of the secondary drivers**: *being a place to avoid surprises* and *being socially responsible*
- Leveraging **culture** with HVGs can help elevate consideration

Fall/Winter Travel

- Canada leads unaided mentions for the **Fall** season, surpassing other competitive destinations significantly. In the **Winter** season, Canada is also at the forefront, followed by Finland and Norway
- Canada has the opportunity to draw more visitors in the **Fall** than Winter, with **10M** and **6.5M** who typically travel during these seasons respectively
- The **two-year immediate potential** for Canada is also **higher in** the **Fall (6M)** than **Winter (4M)** season
- Prominent Fall's activities for Canada center around **nature**, encompassing **natural attractions**, the **Northern Lights**, and fall **colors**. **Northern Lights viewing** also stands out as a Winter attraction, in addition to the experience of **Indigenous culture** and **city sightseeing**

Key Insights

Sustainable Travel

- **Sustainability** is of **moderate priority** for French travellers, but ***being environmentally friendly*** and ***socially responsible*** are **among important drivers** of destination consideration
- Iceland emerges as the primary competitor in this space. Canada excels in **social responsibility** compared to Iceland, yet Iceland holds an advantage in environmental friendliness
- **Conserving natural areas**, ensuring a positive impact on **local culture**, and **directing monetary support to local communities** are significant sustainability efforts for French travellers and HVGs
- To overcome the significant barriers to sustainable travel, Destination Canada could focus on addressing the perception of **higher costs** and the **lack of information**, which are prevalent among both general travellers and the HVG audience
- Implementing effective communication strategies that highlight **Canada's sustainability initiatives** and provide **comprehensive education** to travellers is important. This approach can play a pivotal role in not only mitigating these barriers but also in elevating the consideration of Canada as a preferred destination

Indigenous Tourism

- **Australia is the best recognized** destination associated with Indigenous tourism, **with Canada ranking 2nd**
- The **culture**, followed by **visiting villages/local people** are the **top activities** that come to mind when it comes to Indigenous tourism
- **Visiting Indigenous communities,** excursions in **nature**, **food and drink**, and **storytelling/connecting with elders** are of greatest interest to French travellers to experience Indigenous culture in Canada. Indigenous activities are **also popular for Winter travel** and could drive travel for the season
- HVGs exhibit heightened interest in **experiences** like visiting remote **Northern Indigenous communities**, exploring **museums**, attending **festivals**, and engaging in educational opportunities surrounding **residential schools and reconciliation**. To enhance the overall visitor experience, focus on promoting these activities and creating tailored offerings that align with the specific preferences of HVGs

Overall Travel Outlook & Trends

Types of Travel Trips

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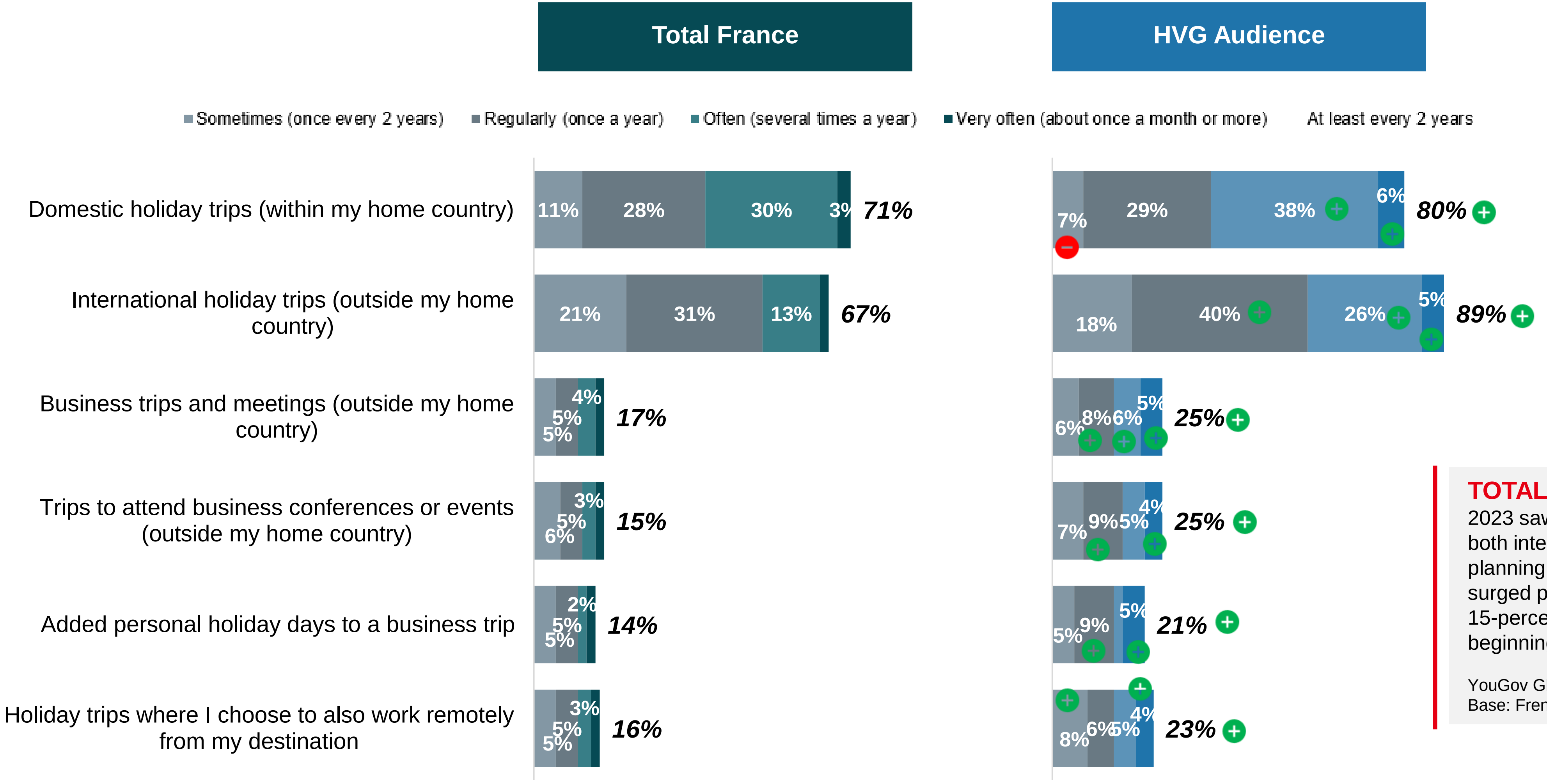
Domestic holidays are taken slightly more frequently than international holidays among total French travellers. However, HVGs exhibit a higher preference for international holiday trips. Combining personal holidays with business trips and opting for remote work during holidays is not widely embraced by total travellers and HVGs.



TOTAL FRANCE

2023 saw year-over-year increases in both international and domestic vacation planning. International vacation plans surged post-pandemic, experiencing a 15-percentage point increase from the beginning of 2021 to the end of 2023

YouGov Global Travel Profiles (France) – 2023
Base: French 18+

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
A6. How often do you typically travel on each of the following types of trips?

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

Overall Demand for Long-Haul Pleasure Travel

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Total Population 18+
51,373,500

x

Long-Haul Traveller Incidence Rate
37.9%

=

Size of Target Market
19,470,500

x

HVG
21.5%

=

Size of HVG Population
4,186,000

Total France	**HVG Audience**

Potential Market Size

Total France

Total potential long-haul pleasure travellers aged 18 years or more: **19,470,500**

Target Market for Canada: **14,408,000**

X 74.0%
Dream to purchase Stage for Canada

Immediate Potential for Canada: **6,901,500**

X 47.9%
Likely to visit Canada in the next 2 years[1]

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1113)

HVG Audience

Total potential HVG travellers aged 18 years or more: **4,186,000**

HVG Target Market for Canada: **3,332,000**

X 79.6%
Dream to purchase Stage for Canada

HVG Immediate Potential for Canada: **2,109,000**

X 63.3%
Likely to visit Canada in the next 2 years[1]

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience (n=331); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=262)

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

Travel Agents/Tour Operator Usage For Recent Trip

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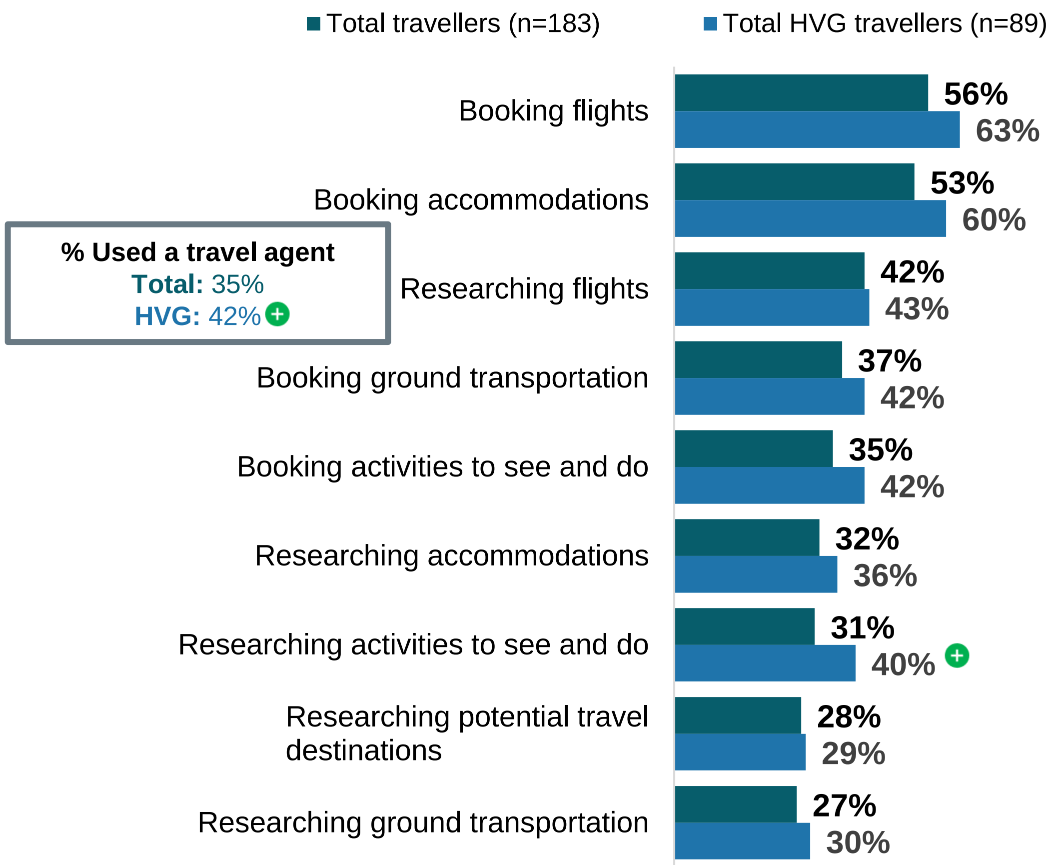
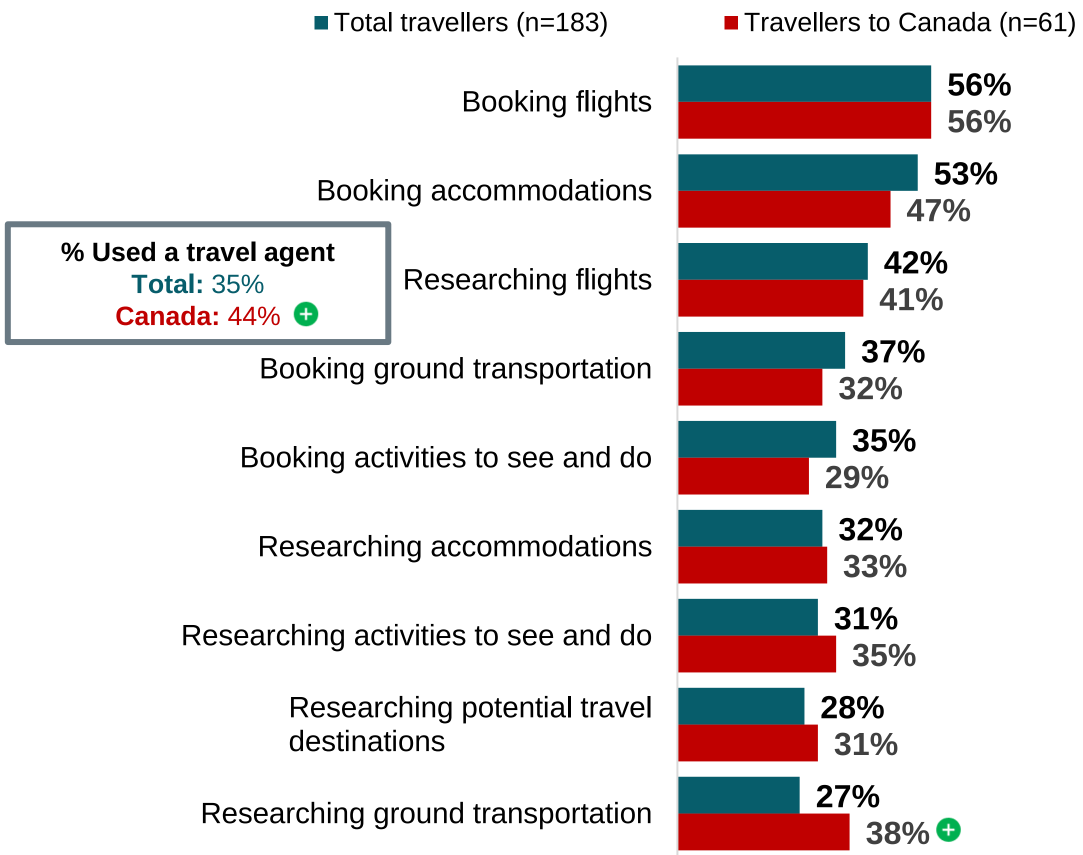
Among those using travel agents/tour operators, accommodations and flight bookings are the primary services. Usage is consistent for travellers to Canada, but there's a significantly greater reliance on travel agents/tour operators for researching ground transportation.

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



Total Travellers to Any Destination vs. Total Travellers to Canada



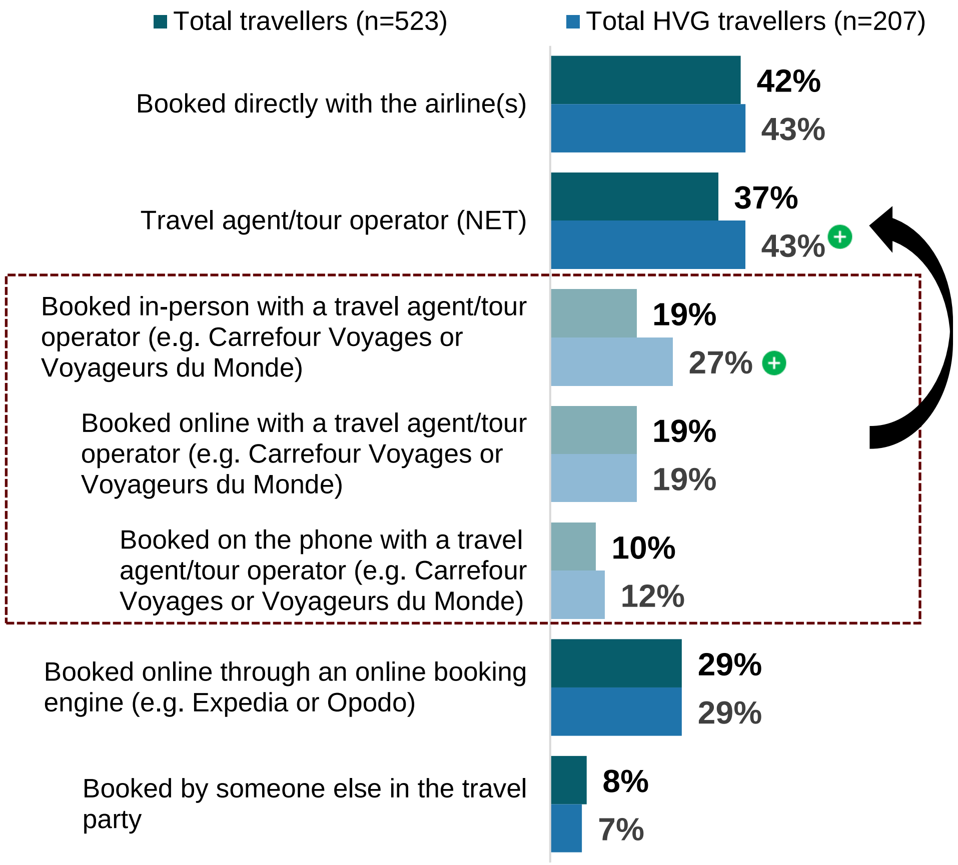
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=183); HVG (n=89); Travellers to Canada (n=61)
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Carrefour Voyages or Voyageurs du Monde, they do not include online booking engines like Expedia or Opodo. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
F10. Which of the following did a travel agent or tour operator help you with?

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

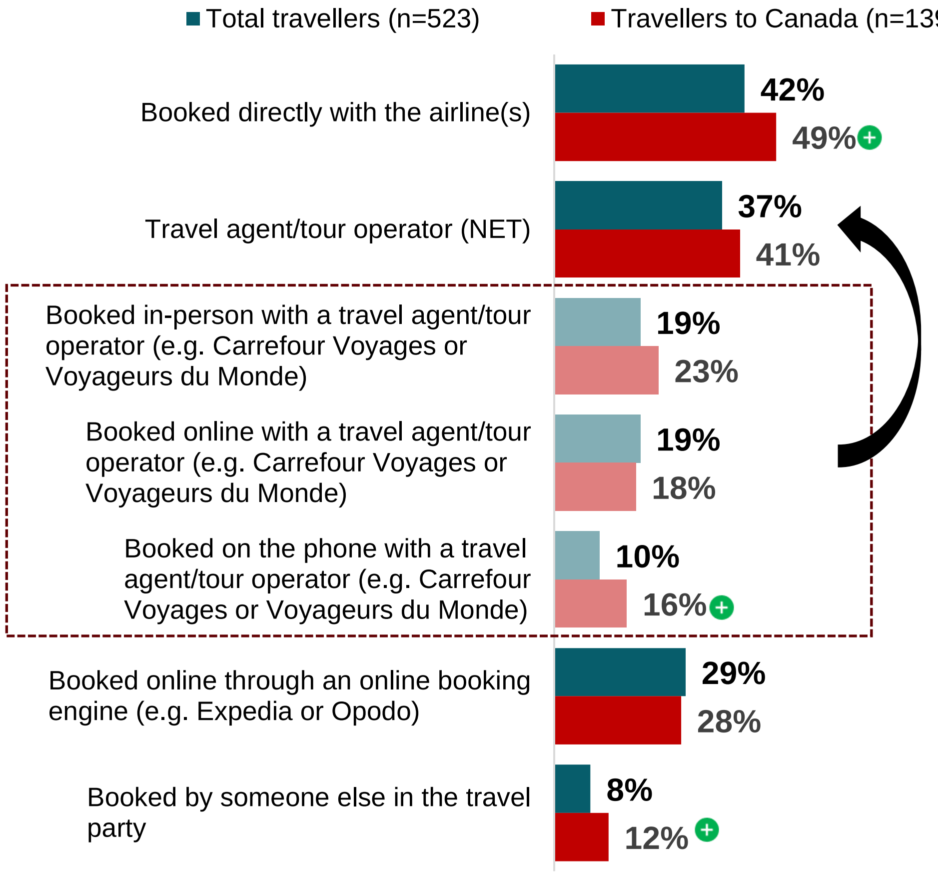
Booking Flights For Recent Trip

Flights are most often booked directly with airlines, followed by travel agents/tour operators. HVGs are equally inclined to book flights directly with airlines and through travel agents/tour operators.

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



Total Travellers to Any Destination vs. Total Travellers to Canada



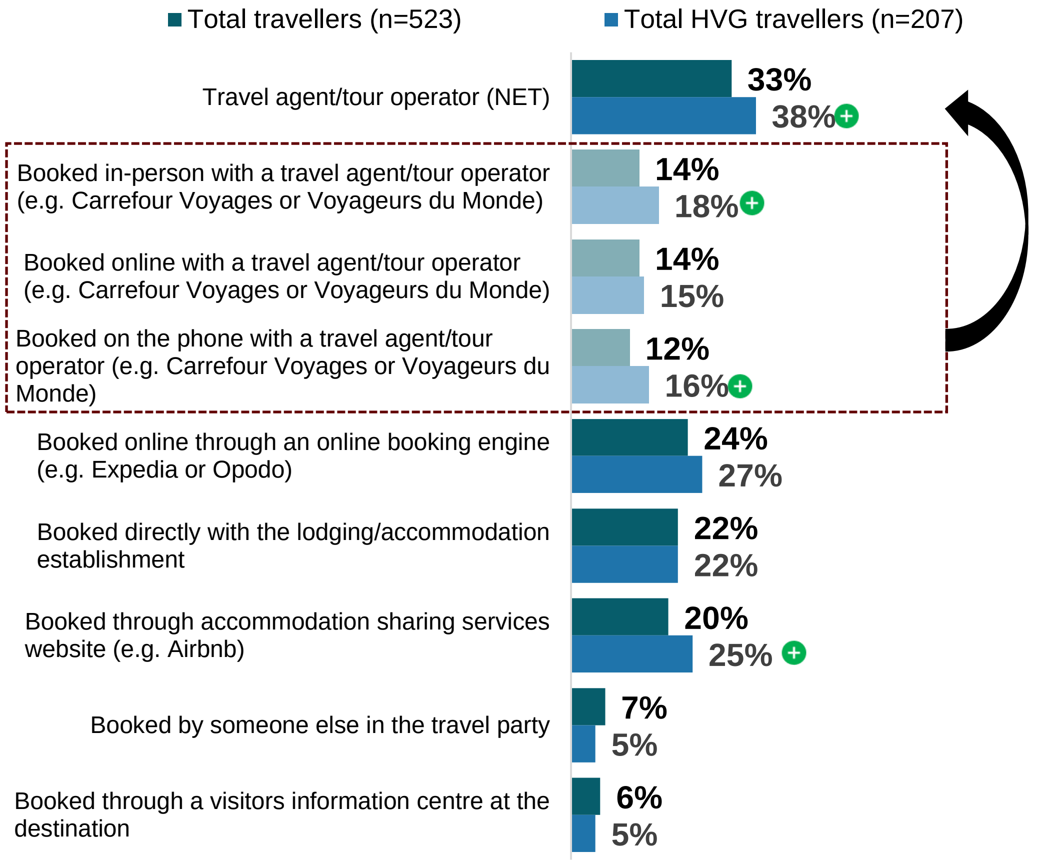
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=523); HVG (n=207); Travellers to Canada (n=139)
F12. How did you book your flight for this trip? (Select all that apply)

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

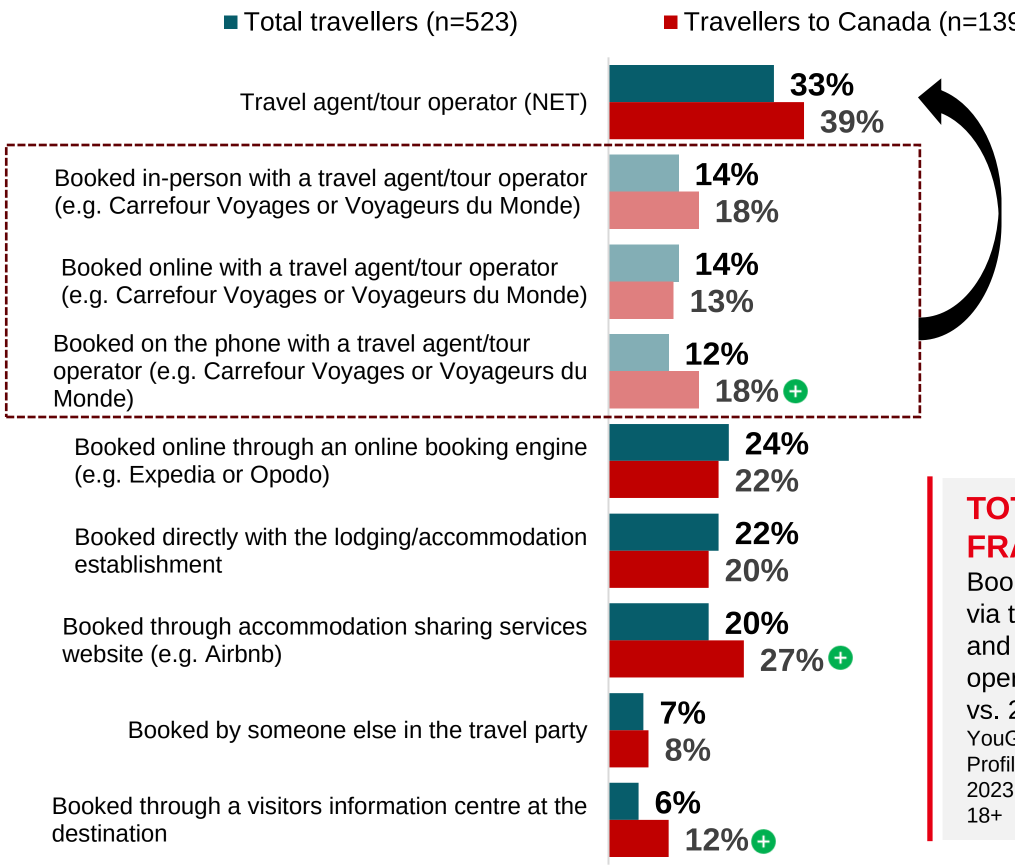
Booking Accommodations For Recent Trip

Booking accommodations through a travel agent/tour operator is most preferred. Booking through accommodation sharing services websites is more popular among HVGs and travellers to Canada than total travellers.

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



Total Travellers to Any Destination vs. Total Travellers to Canada



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

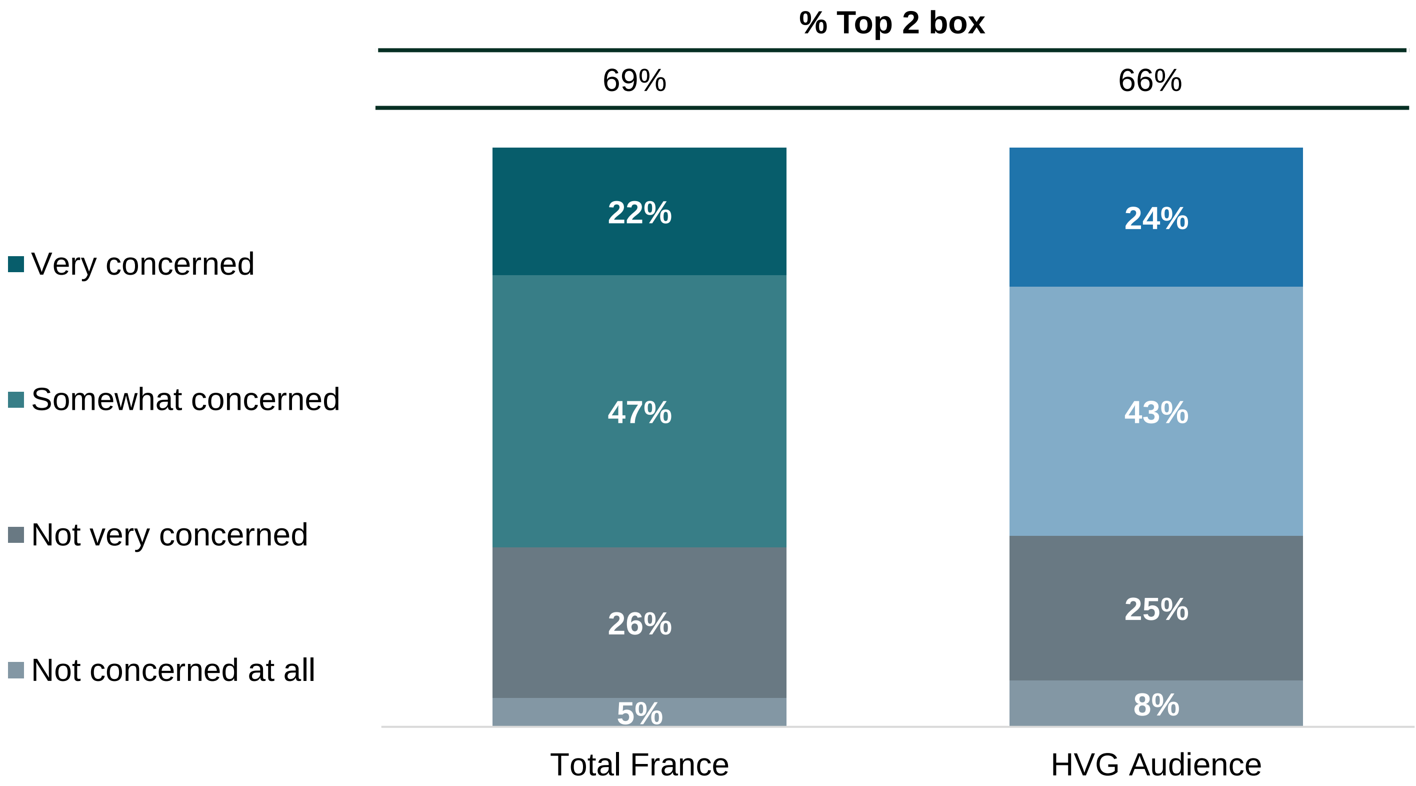
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=523); HVG (n=207); Travellers to Canada (n=139)
F13. How did you book your accommodation for this trip? (Select all that apply)

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

Impact of Extreme Weather Events on Travel Plans

DESTINATION CANADA

Approximately, two-thirds of travellers in France express concern about extreme weather events. Less than two in ten travellers, including HVGs, have changed their plans in the past three years due to such events.



	Total France	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	17%	18%

Extreme Weather Events Description

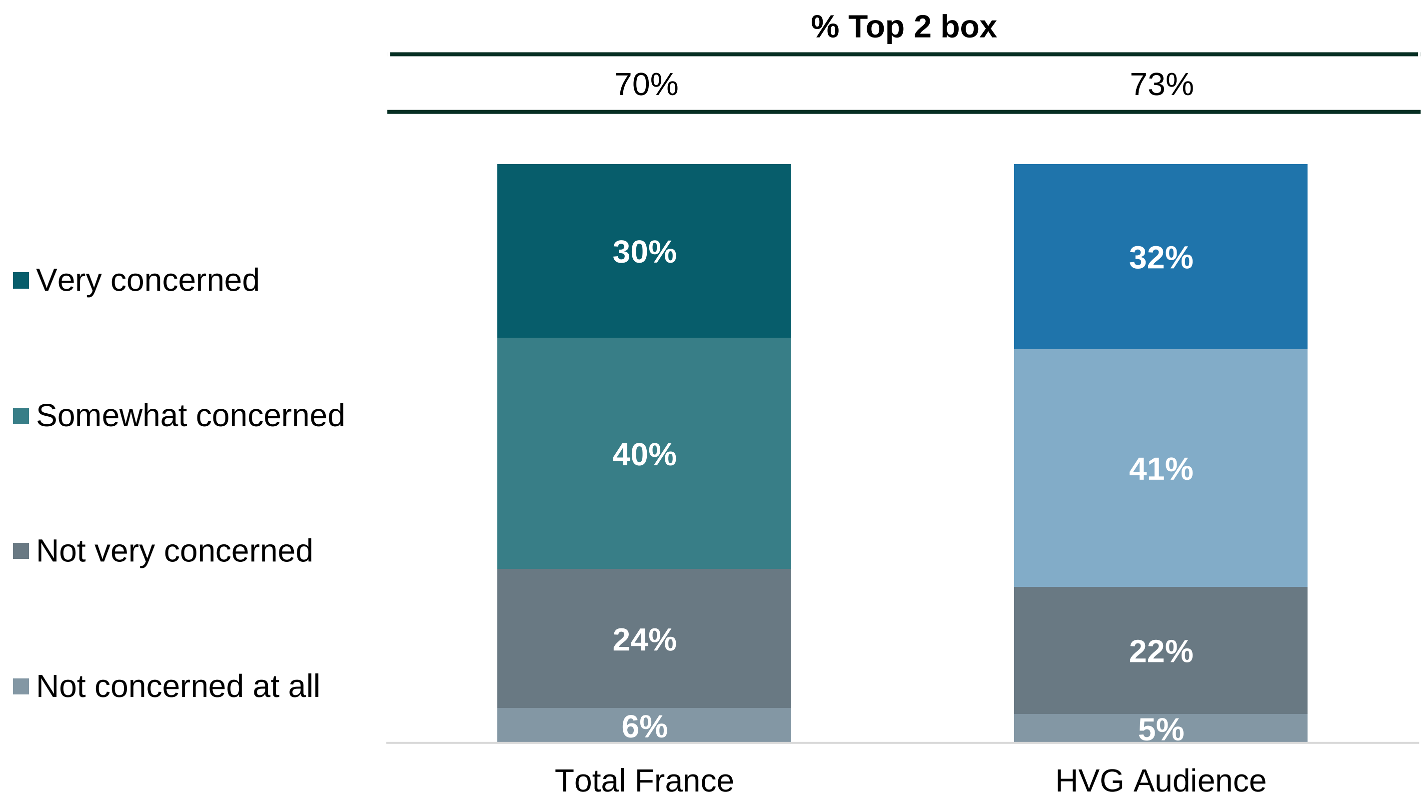
As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

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=730); HVG (n=176)
D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

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

Impact of International Conflicts & Unrest on Travel Plans

Concerns about international conflicts are more pronounced among both long-haul travellers and HVGs. Approximately, one quarter have had to change their travel plans in response to international conflicts or unrest.



	Total France	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to International Conflicts	24%	29%

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=774); HVG (n=155)
D12. [DESCRIPTION] How concerned are you about international conflicts or unrest affecting your travel plans?
D13. In the past 3 years, have you ever had to change plans or cancel a trip due to international conflicts or unrest?

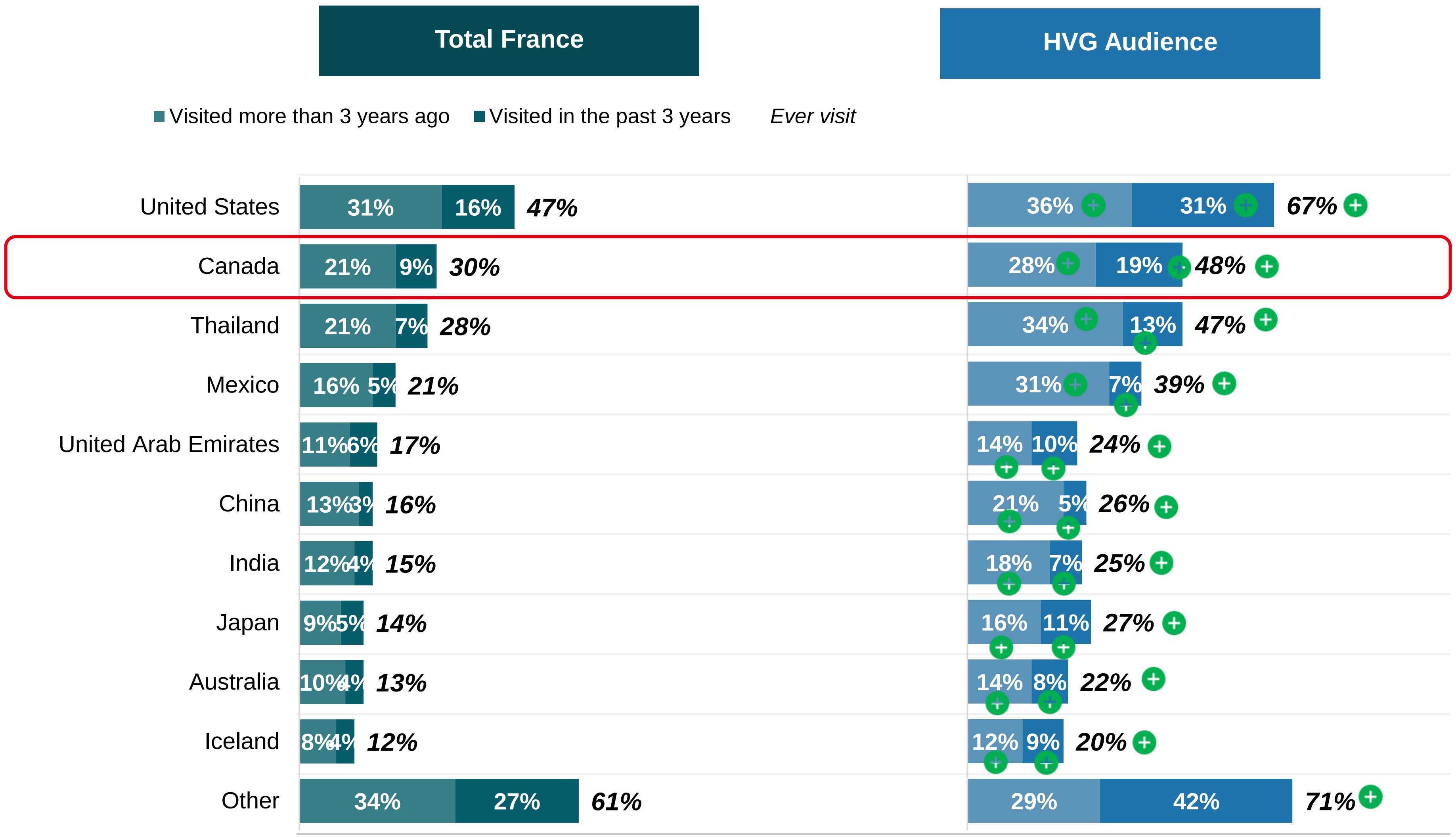
+ / − = significantly higher/lower result (vs. Total)

Canada vs. Competitive Destinations

Past Visitation

DESTINATION CANADA

Canada is a far second, following the US, in terms of past visitation by both total travellers and HVGs. Thailand closely follows Canada in this ranking. HVGs are more likely to have visited all competitive long-haul destinations compared to total French travellers.



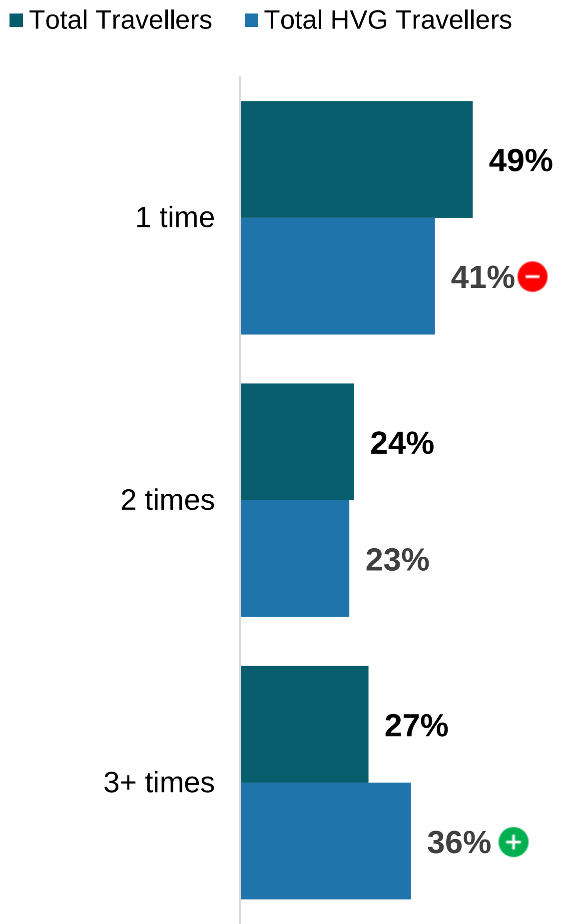
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
B5. Which of the following countries or regions have you visited while on a vacation trip **outside of Europe, North Africa and the Mediterranean** which was 4 or more nights long?

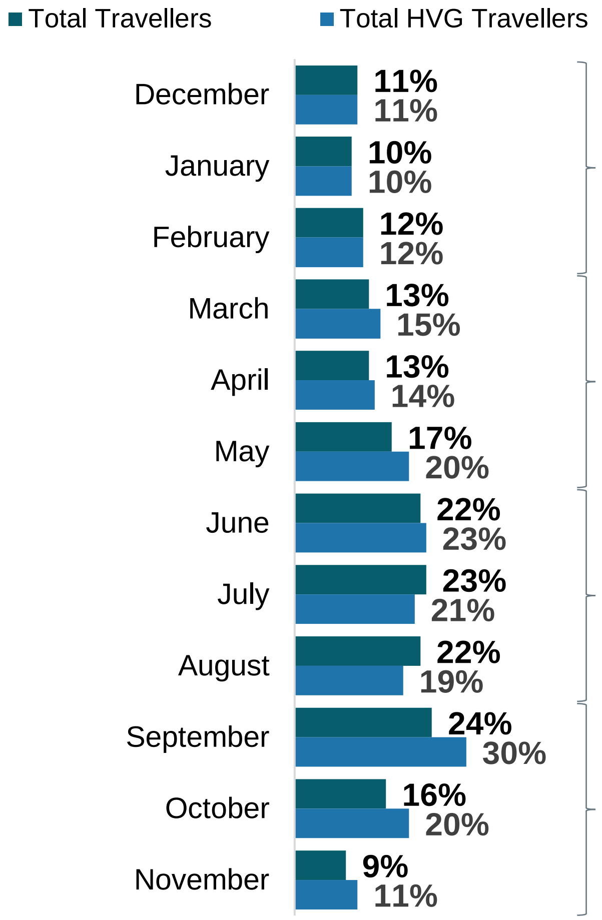
+ / − = significantly higher/lower result (vs. Total)

Number of Visits Ever & Time of Year Visited Canada

DESTINATION CANADA

Half of those who have ever visited Canada have been 2 or more times. The peak season for visits to Canada is during the Summer, while Winter sees the lowest visitation. HVGs are more likely to visit in the Fall.





	Total Travellers	Total HVG Travellers
Winter	22%	23%
Spring	34%	36%
Summer	51%	48%
Fall	36%	42% (+)

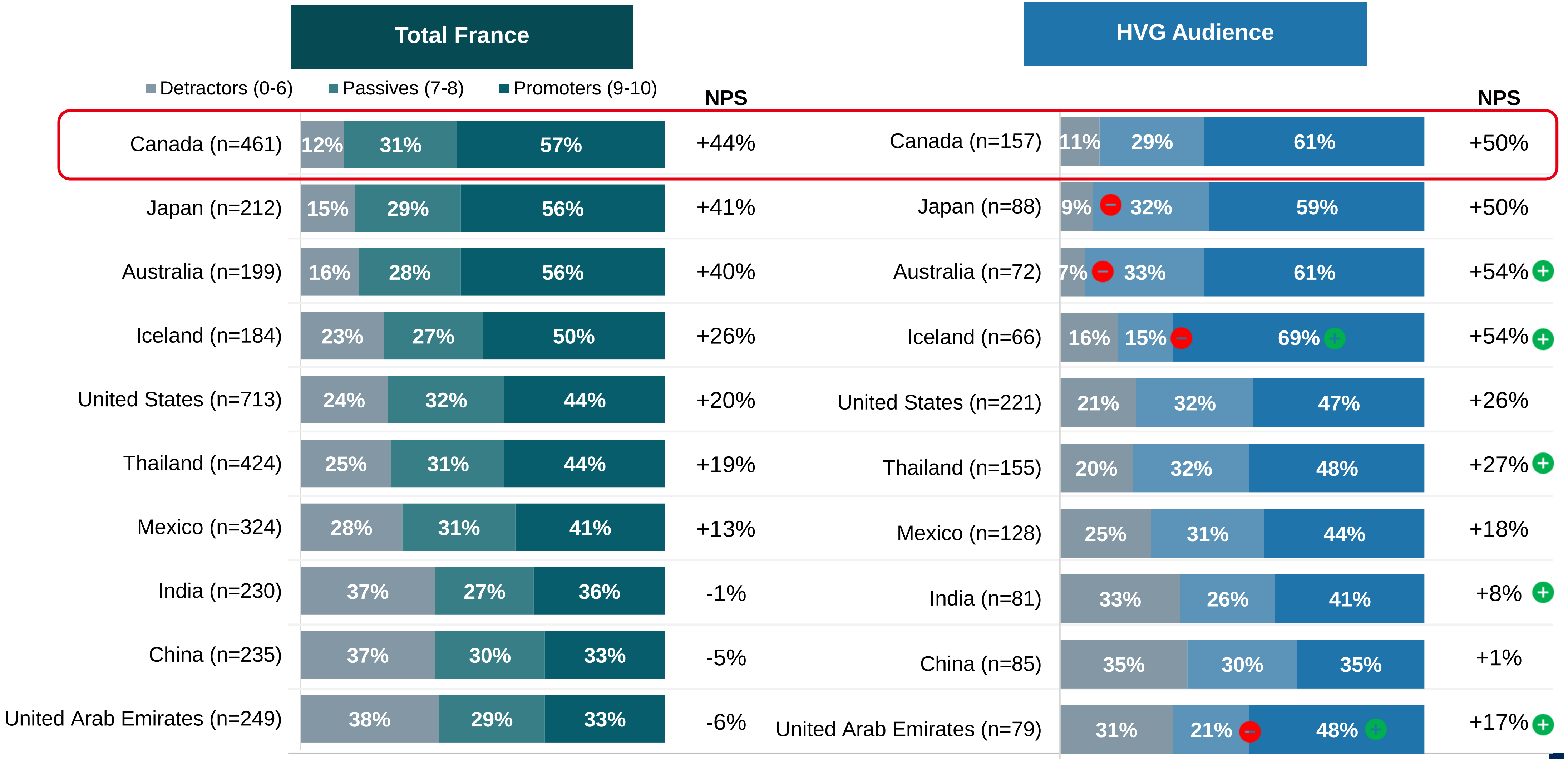
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=424); HVG (n=147)
F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=461); HVG (n=157)

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

Net Promoter Score (NPS)

DESTINATION CANADA

Among those who have visited each destination, Canada ranks top position in NPS among total travellers, but falls slightly behind Australia and Iceland, and ties with Japan among HVGs.



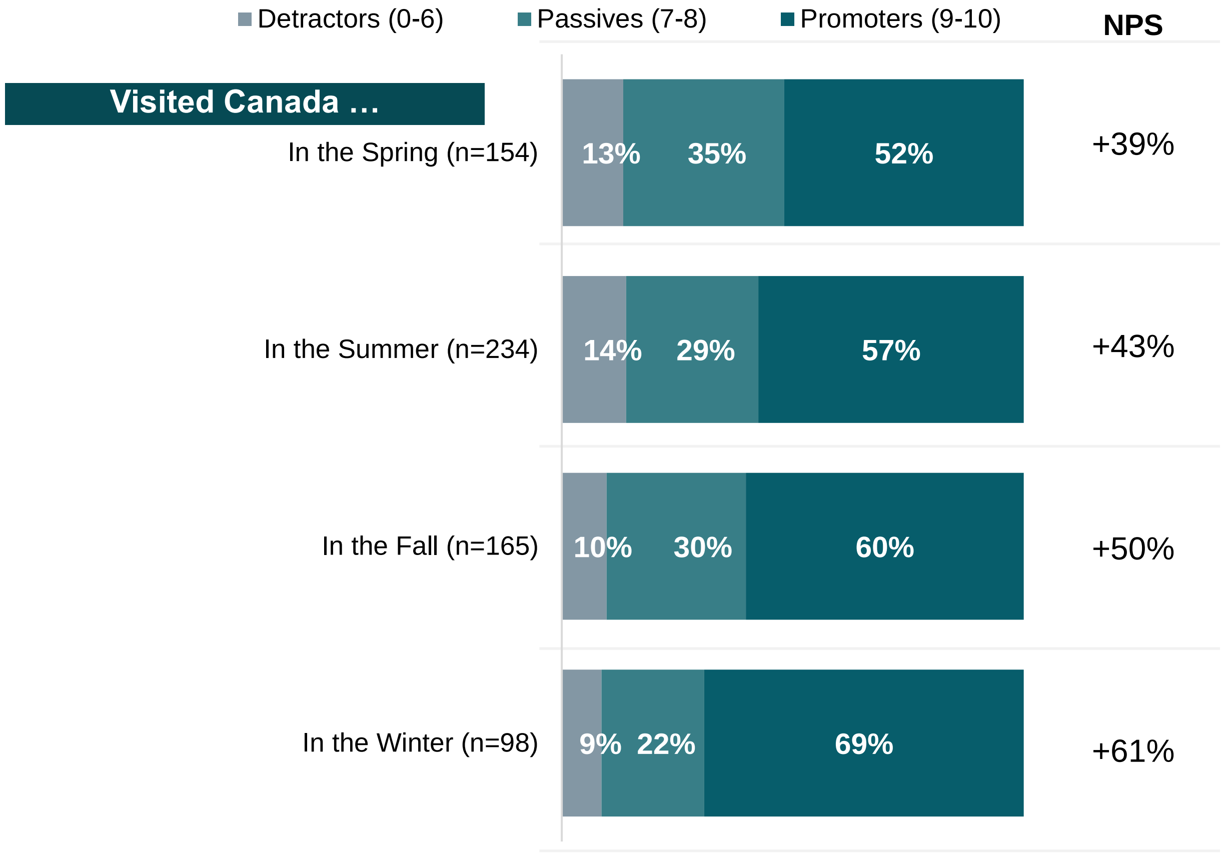
Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

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

Canada Net Promoter Score (NPS) by Season

DESTINATION CANADA

Winter, despite being the least visited season, receives the most favourable NPS, followed by the Fall.



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 **Canada**
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
F20. What time of year have you ever visited Canada? Select all that apply.

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

Performance Scorecard for Canada

DESTINATION CANADA

Canada was the top performing destination in France in 2023, ranking 1st (out of 9 destinations) in seven of eight key performance metrics and in the top two for all metrics. Scores also increased for positive reputation and overall destination health.

Total Impression	Consideration	Positive Recommend	Destination Health Index
53%	**21%**	**33%**	**33%** ▲
Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*

Positive Reputation	Positive Buzz	Ad Awareness	Word of Mouth
41% ▲	**18%**	**10%**	**15%**
Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **2nd** *(out of 9)* (Behind: US)

TOTAL France

Competitive set: US, Iceland, Japan, Thailand, Australia, Mexico, India, China

YouGov DestinationIndex (France) – 2023

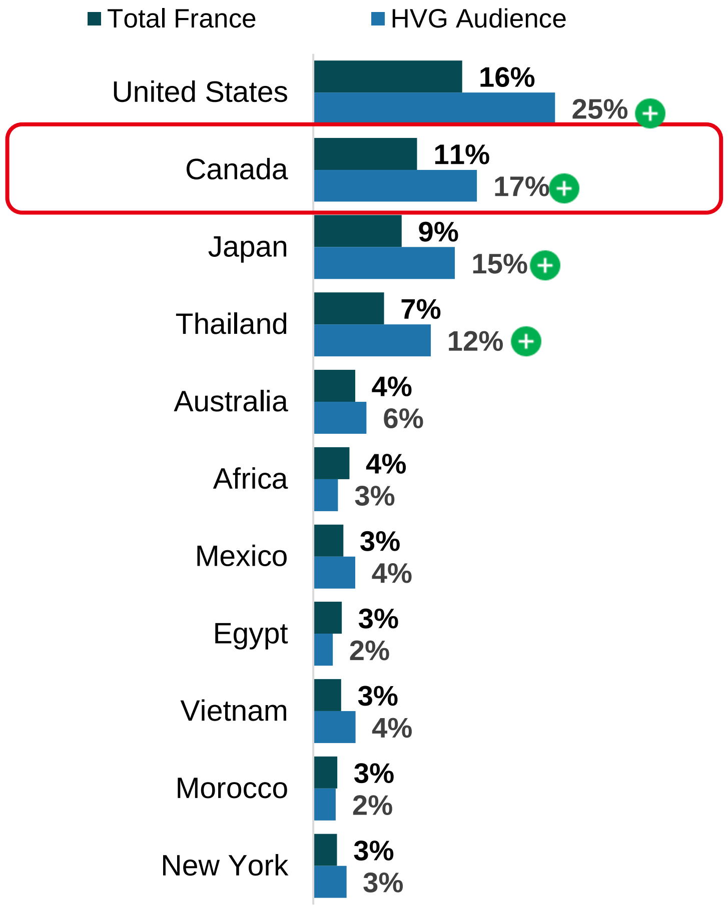
Base: French 18+ (n=6,479)

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

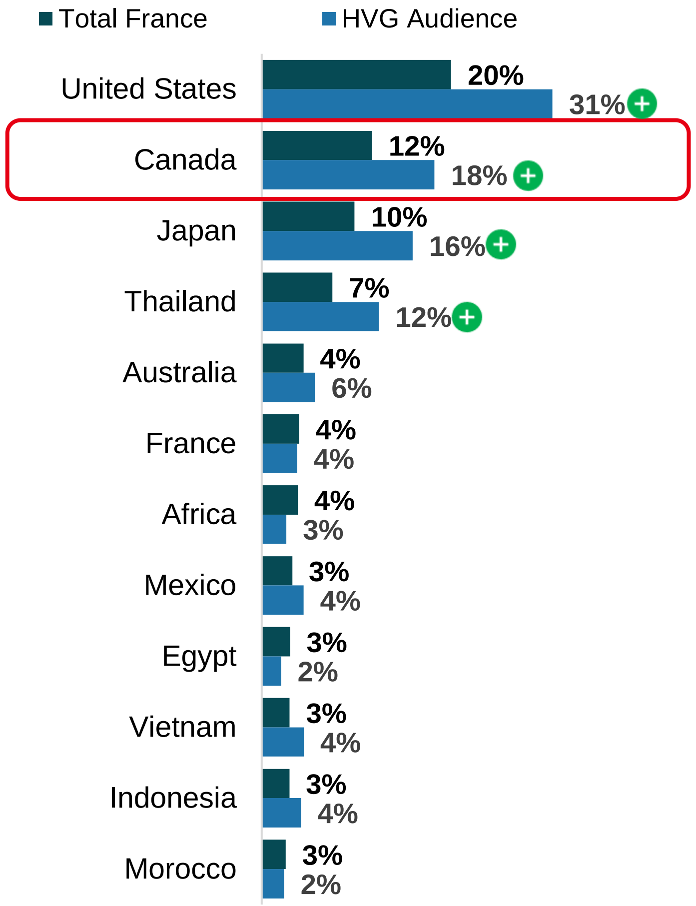
Unaided Long-Haul Destination Consideration (Next 2 Years)

On unaided basis, the US leads long-haul destination consideration, while Canada ranks second. Alongside Japan and Thailand, Canada forms a secondary cluster among total travellers and HVGs.

Top Destination Brands[1]



Top Destinations[2]

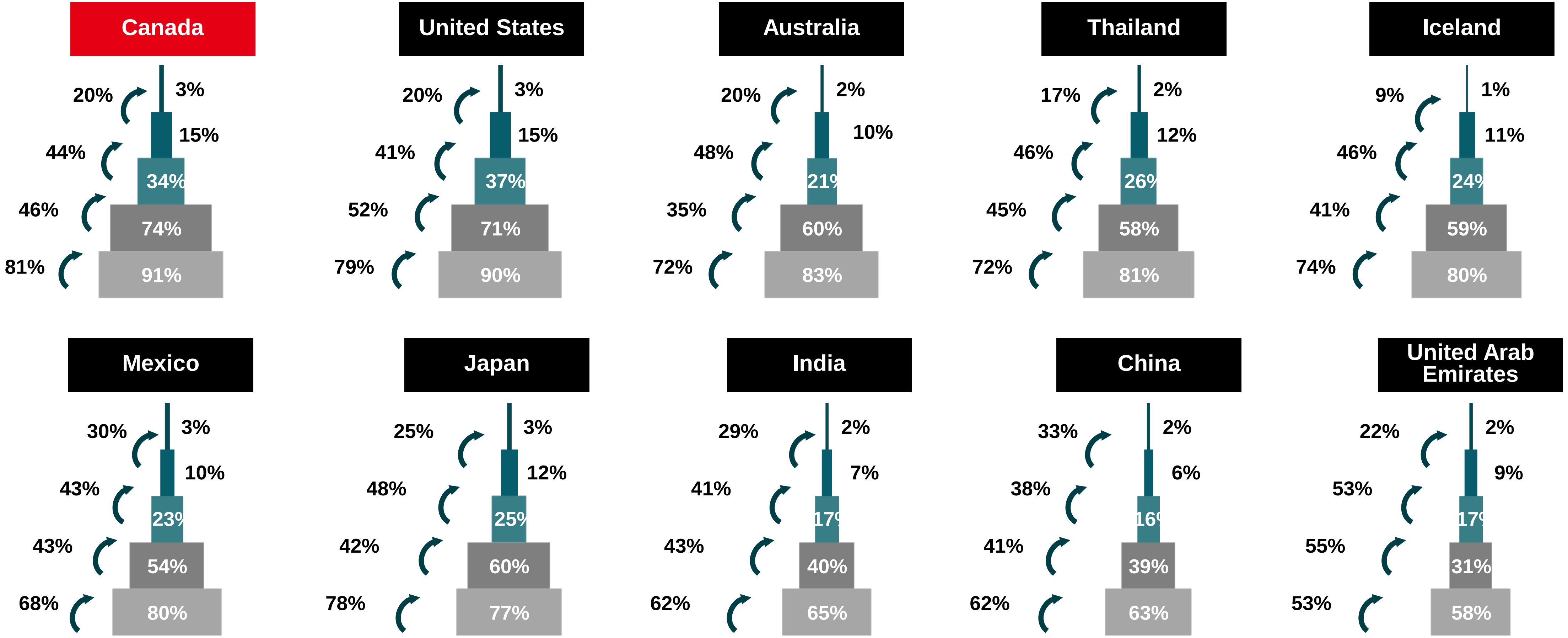


[1] Responses as mentioned by respondents (e.g., percentage who said “Canada” specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
B1. You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

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

Consideration Funnels: Total France Travellers

Canada demonstrates strong performance across all levels of the consideration funnel, similar to that of the United States, with comparable conversion rates at various stages.

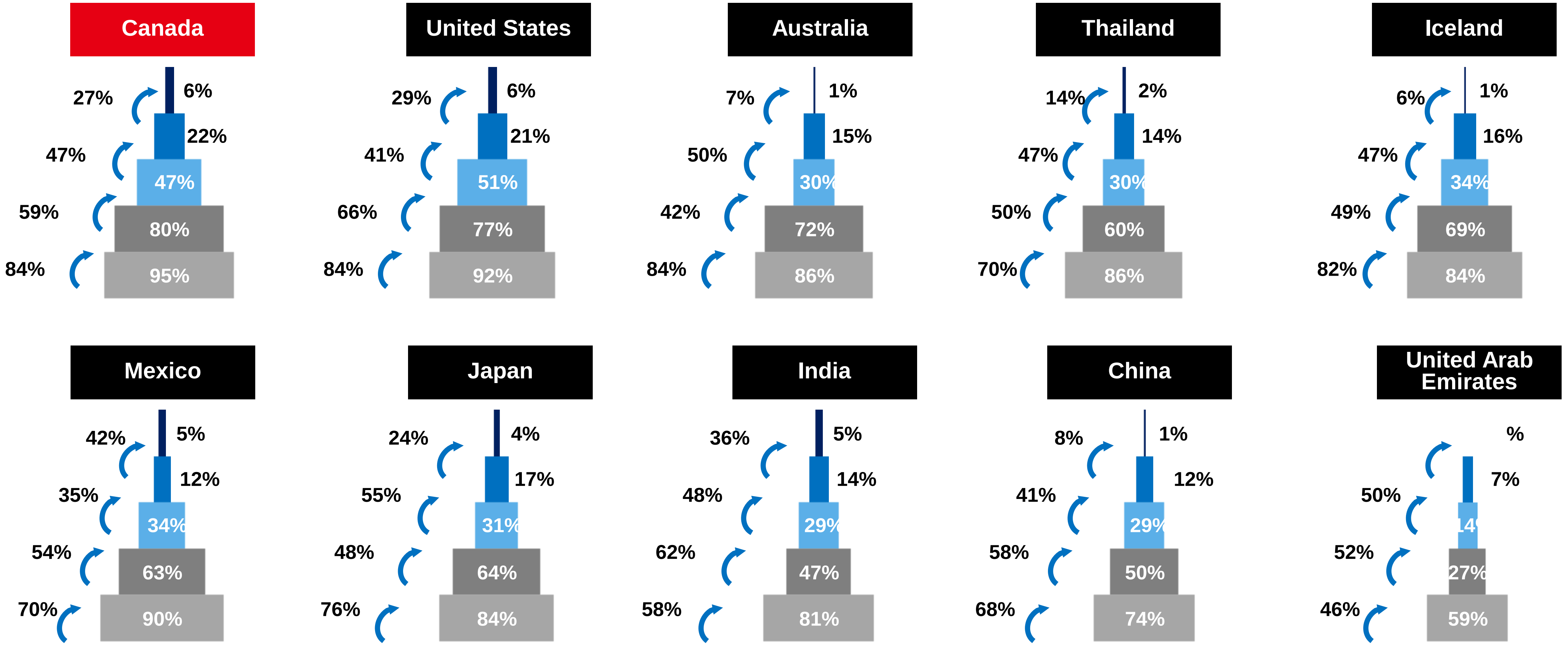


Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
See notes for question wording and funnel definitions

Consideration Funnels: Among HVG Audience

Compared to total French travellers, Canada receives higher consideration among HVGs, slightly behind the US, but ahead of all other competitive destinations by a large margin.

DESTINATION CANADA



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]
See notes for question wording and funnel definitions

Destination Consideration By Seasons

Canada is most considered during Summer and Fall among all travellers and HVGs.

Total France	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=304)	34%	34%	37%	30%
Canada (n=1113)	27%	34%	46%	42%
China (n=197)	23%	39%	41%	29%
Iceland (n=298)	29%	36%	46%	32%
India (n=202)	31%	45%	39%	36%
Japan (n=299)	18%	49%	40%	29%
Mexico (n=267)	30%	43%	37%	34%
Thailand (n=293)	35%	40%	31%	27%
United Arab Emirates (n=151)	41%	40%	26%	33%
United States (n=352)	26%	46%	44%	37%

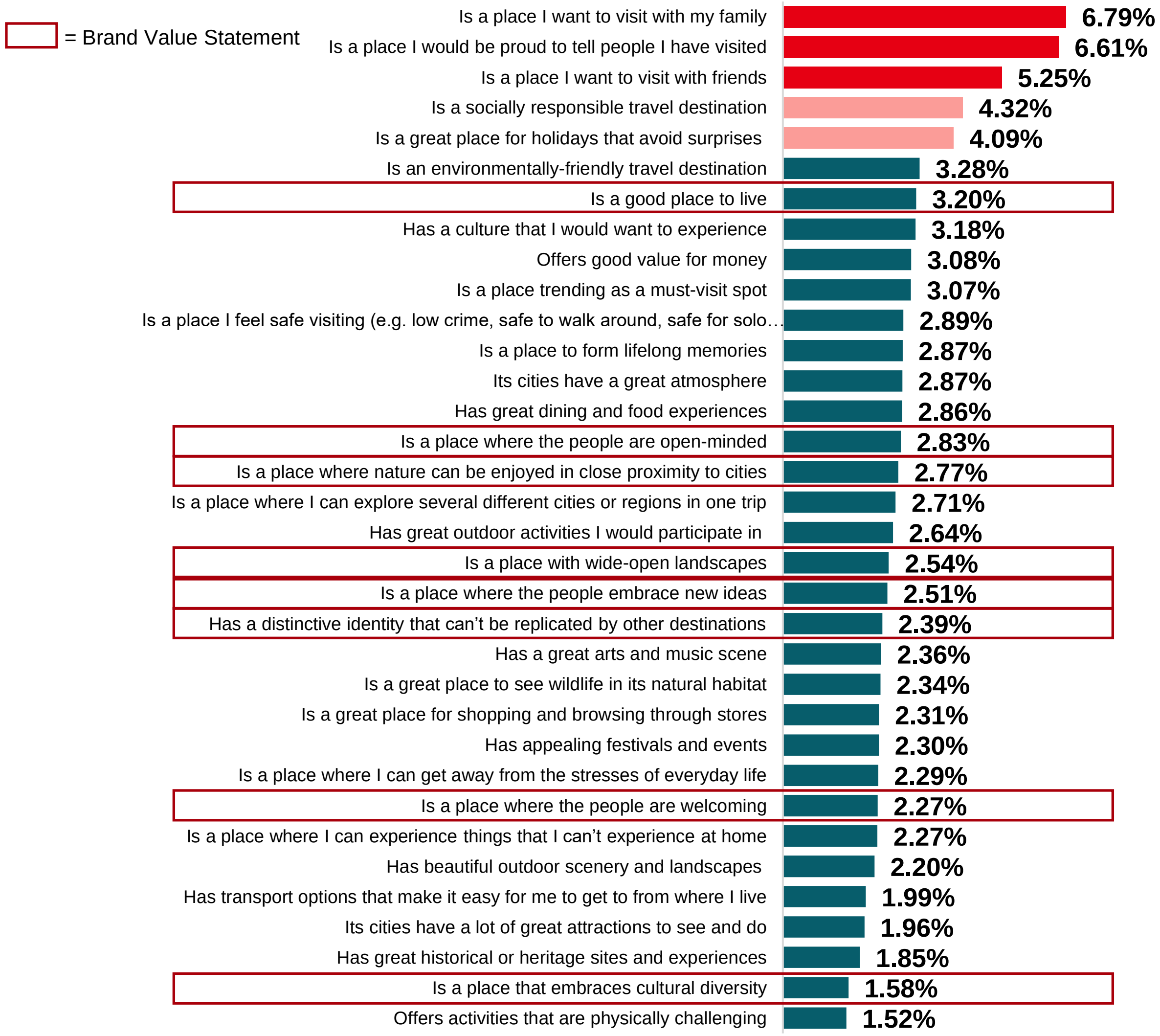
HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=87)	41%	34%	28% (-)	29%
Canada (n=262)	23%	36%	50%	47%
China (n=50)	17%	37%	44%	34%
Iceland (n=74)	25%	39%	59% (+)	27%
India (n=41*)	35%	47%	24% (-)	34%
Japan (n=66)	18%	54%	34%	28%
Mexico (n=66)	33%	48%	32%	33%
Thailand (n=67)	38%	45%	22%	27%
United Arab Emirates (n=35*)	42%	43%	31%	38%
United States (n=97)	23%	45%	42%	46% (+)

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 [DESTINATON]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?
*Small base size, interpret with caution (n<50)

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

Destination Attributes: Drivers Analysis

Primary drivers of consideration include visiting with family and friends and being proud to tell people I have visited. Secondary factors include social responsibility and being a place for holidays that avoid surprises.



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 Attributes – Relative Strengths & Weaknesses: Among Total France

Canada is recognized for safety, a place to avoid surprises, environmental friendliness, and social responsibility. White space opportunities include visiting with family and friends and being proud to tell people I have visited.

		Canada	Australia	China	Iceland	India	Japan	Mexico	Thailand	United Arab Emirates	United States
	n=	1504	501	501	501	501	502	503	501	501	501
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life				Strength						Weakness
	Is a place to form lifelong memories	Weakness									
	Is a place I would be proud to tell people I have visited										
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength			Strength	Weakness	Strength	Weakness	Weakness	Strength	Weakness
	Is a place where I can explore several different cities or regions in one trip				Weakness						Strength
	Offers good value for money		Weakness			Strength	Weakness	Strength	Strength		Weakness
	Has transport options that make it easy for me to get to from where I live									Strength	Strength
Type of Trip	Is a place I want to visit with friends										
	Is a place I want to visit with my family										
	Is a great place for holidays that avoid surprises	Strength			Strength	Weakness		Weakness			
	Is a place where I can experience things that I can't experience at home	Weakness									
	Is an environmentally-friendly travel destination	Strength			Strength	Weakness		Weakness	Weakness		Weakness
	Is a socially responsible travel destination	Strength			Strength			Weakness	Weakness		
	Is a place trending as a must-visit spot	Weakness				Weakness				Strength	Strength
To-Do	Offers activities that are physically challenging						Weakness				
	Is a great place for shopping and browsing through stores				Weakness	Weakness		Weakness	Weakness	Strength	Strength
	Its cities have a lot of great attractions to see and do				Weakness						Strength
	Has great outdoor activities I would participate in		Strength	Weakness	Strength		Weakness				
	Has great dining and food experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength	Strength	Strength		Weakness
	Has a great arts and music scene				Weakness				Weakness		Strength
	Has appealing festivals and events				Weakness						Strength
To-See	Its cities have a great atmosphere				Weakness						Strength
	Has beautiful outdoor scenery and landscapes										
	Is a great place to see wildlife in its natural habitat		Strength				Weakness			Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Weakness	Strength		Strength			
	Has a culture that I would want to experience	Weakness		Strength		Strength	Strength	Strength			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.

Brand Value Statements: Among Total France

Canada exhibits strengths across most brand value statements, with its only notable weakness being a lack of distinctive identity, which is more closely associated with China, India, and Japan.

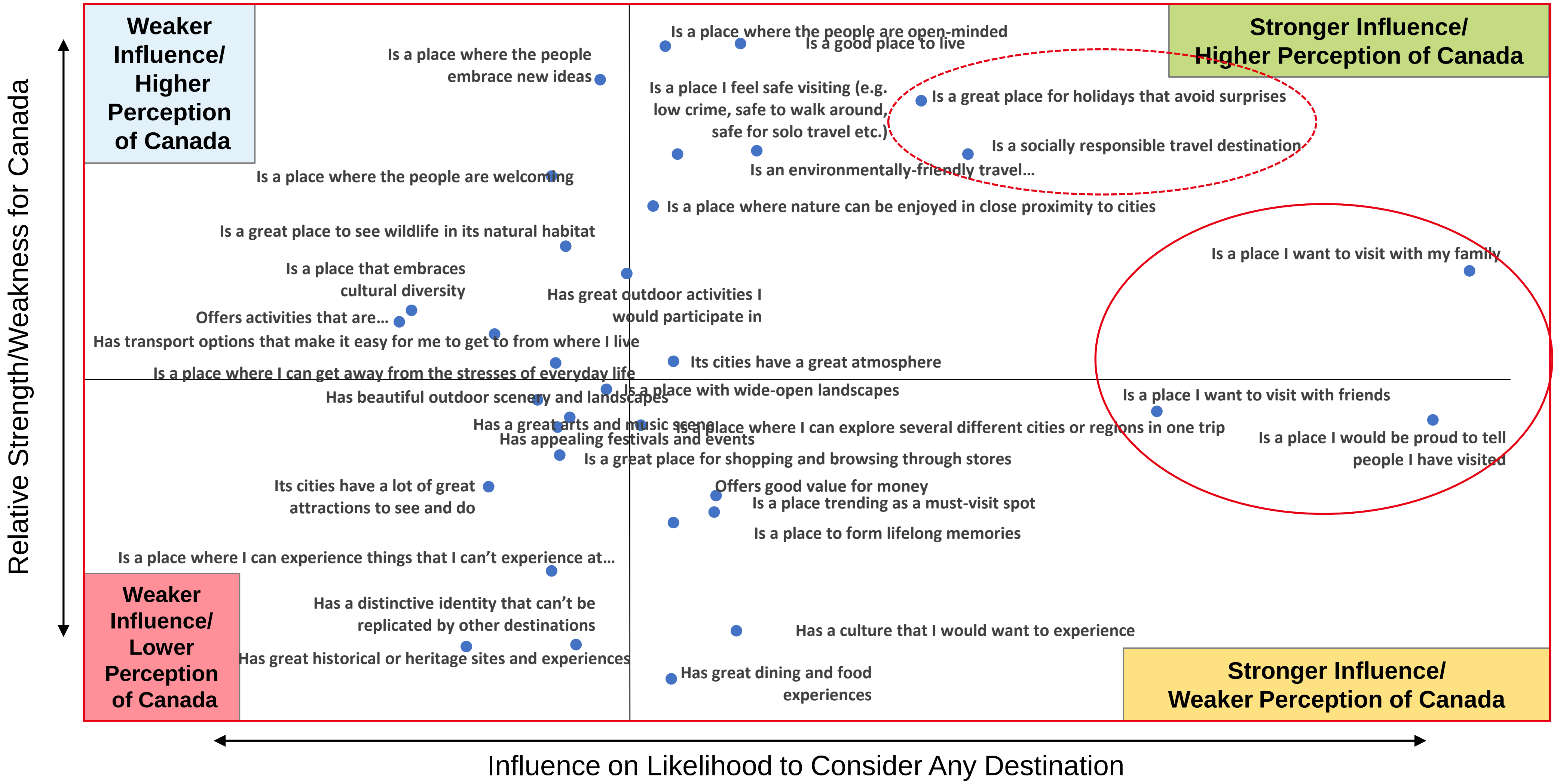
	Canada	Australia	China	Iceland	India	Japan	Mexico	Thailand	United Arab Emirates	United States
n=	1504	501	501	501	501	502	503	501	501	501
Is a place with wide-open landscapes										
Is a place where nature can be enjoyed in close proximity to cities	Strength	Strength		Strength						Weakness
Is a place that embraces cultural diversity				Weakness	Strength	Weakness				Strength
Is a place where the people are welcoming	Strength		Weakness					Strength		Weakness
Is a place where the people are open-minded	Strength		Weakness			Weakness	Weakness			
Is a place where the people embrace new ideas	Strength				Weakness		Weakness			
Is a good place to live	Strength		Weakness		Weakness					Weakness
Has a distinctive identity that can't be replicated by other destinations	Weakness	Weakness	Strength		Strength	Strength				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.

Canada Strengths & Opportunities: Total France

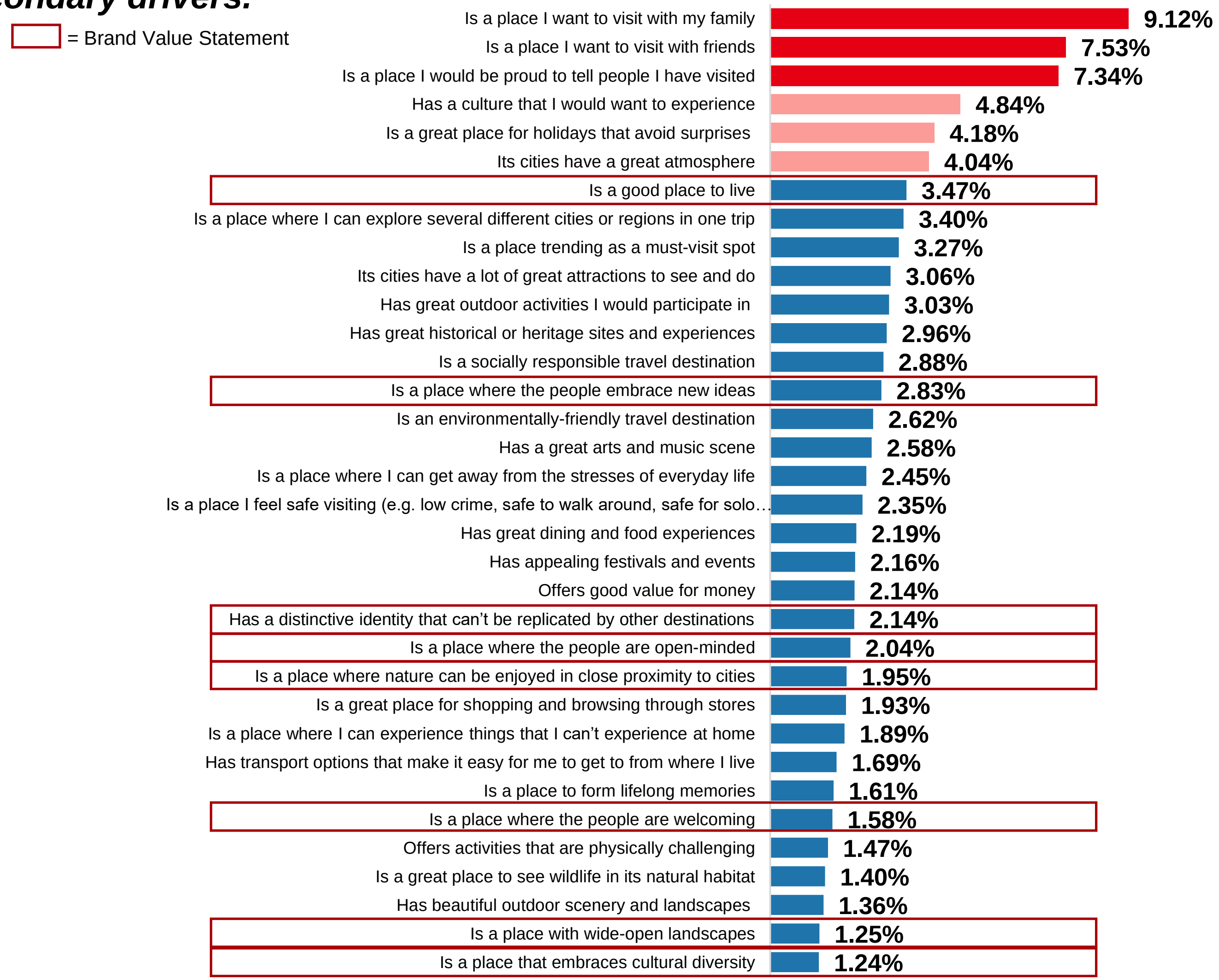
Canada can leverage its strengths in being a place to avoid surprises and social responsibility to drive consideration. Improvement in key drivers such as visiting with family and friends and being proud to tell others I have visited can also further enhance consideration.



Destination Attributes: Drivers Analysis: Among HVG Audience

DESTINATION CANADA

Among HVGs, the most influential factors of consideration also feature visiting with my family/friends and being proud to tell other I have visited. Cultural appeal, being a place to avoid surprises, and atmosphere in cities are secondary drivers.



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.

Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience

Canada excels among HVGs in safety, being a place to avoid surprises, environmental friendliness and social responsibility. White space opportunities include visiting with family and friends and being proud to tell people I have visited.

		Canada	Australia	China	Iceland	India	Japan	Mexico	Thailand	United Arab Emirates	United States
	n=	331	121	99	108	88	104	106	110	130	127
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life				Strength						Weakness
	Is a place to form lifelong memories	Weakness									
	Is a place I would be proud to tell people I have visited										
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength			Strength	Weakness	Strength	Weakness	Weakness	Strength	Weakness
	Is a place where I can explore several different cities or regions in one trip				Weakness					Weakness	Strength
	Offers good value for money		Weakness			Strength	Weakness	Strength	Strength		Weakness
	Has transport options that make it easy for me to get to from where I live		Weakness							Strength	
Type of Trip	Is a place I want to visit with friends										
	Is a place I want to visit with my family										
	Is a great place for holidays that avoid surprises	Strength			Strength	Weakness		Weakness			
	Is a place where I can experience things that I can't experience at home	Weakness				Strength					
	Is an environmentally-friendly travel destination	Strength			Strength			Weakness	Weakness		Weakness
	Is a socially responsible travel destination	Strength			Strength				Weakness		
	Is a place trending as a must-visit spot	Weakness				Weakness	Strength	Weakness		Strength	
To-Do	Offers activities that are physically challenging				Strength	Weakness	Weakness		Weakness		
	Is a great place for shopping and browsing through stores				Weakness	Weakness	Strength	Weakness		Strength	Strength
	Its cities have a lot of great attractions to see and do				Weakness	Weakness					Strength
	Has great outdoor activities I would participate in				Strength	Weakness	Weakness				
	Has great dining and food experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength	Strength	Strength		Weakness
	Has a great arts and music scene				Weakness				Weakness		Strength
	Has appealing festivals and events				Weakness						Strength
	Its cities have a great atmosphere				Weakness						Strength
To-See	Has beautiful outdoor scenery and landscapes										
	Is a great place to see wildlife in its natural habitat		Strength				Weakness			Weakness	
	Has great historical or heritage sites and experiences	Weakness		Strength		Strength		Strength		Weakness	Weakness
	Has a culture that I would want to experience	Weakness		Strength		Strength	Strength				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), HVG Audience, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Brand Value Statements: Among HVG Audience

Among HVGs, Canada is also strongly associated with most brand value statements with a weakness in distinctive identity.

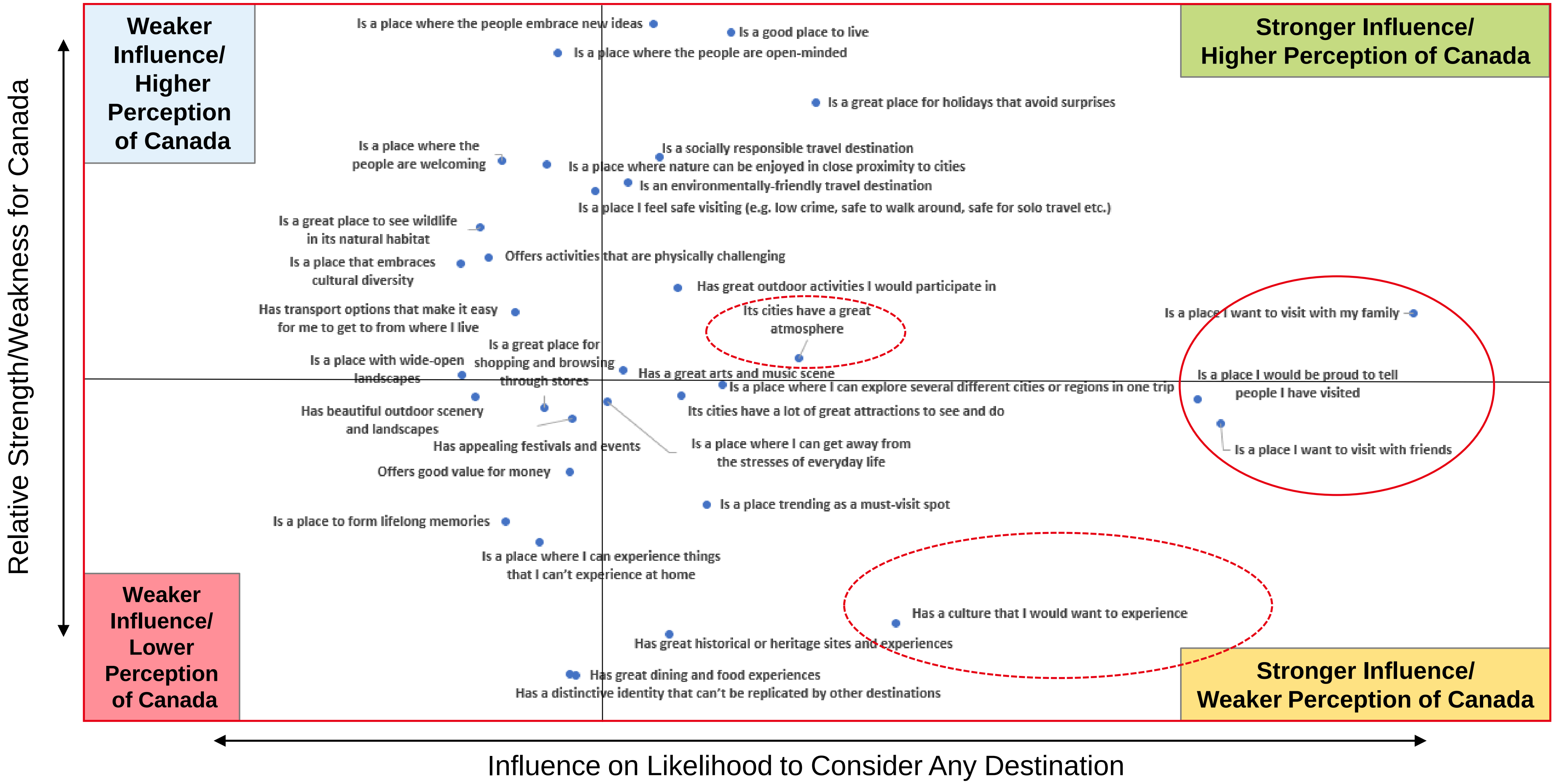
	Canada	Australia	China	Iceland	India	Japan	Mexico	Thailand	United Arab Emirates	United States
n=	331	121	99	108	88	104	106	110	130	127
Is a place with wide-open landscapes				Strength						
Is a place where nature can be enjoyed in close proximity to cities	Strength	Strength			Weakness	Weakness				Weakness
Is a place that embraces cultural diversity				Weakness	Strength	Weakness				Strength
Is a place where the people are welcoming	Strength							Strength		Weakness
Is a place where the people are open-minded	Strength		Weakness			Weakness	Weakness			
Is a place where the people embrace new ideas	Strength		Weakness		Weakness					Strength
Is a good place to live	Strength				Weakness					Weakness
Has a distinctive identity that can't be replicated by other destinations	Weakness	Weakness	Strength		Strength	Strength				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), HVG Audience, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Canada Strengths & Opportunities: Among HVG Audience

Opportunities to improve consideration include visiting with family and friends and being proud to tell people I have visited. Culture and city atmosphere can be considered as secondary priorities.



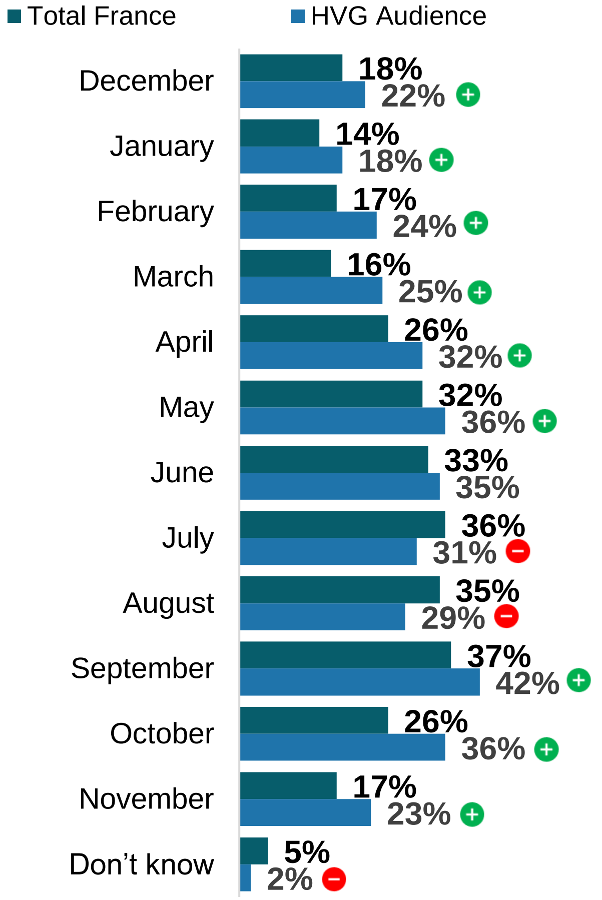
Increasing Fall/Winter Visitation

Aurora Borealis, Yellowknife
Northwest Territories

Demand by Season (Any Destination)

DESTINATION CANADA

Summer attracts the highest travel demand (~12 million), while approximately 6.5 million French travellers typically travel during the Winter months. HVGs typically travel the most in the Fall months, followed closely by the Summer and Spring.



			POTENTIAL MARKET SIZE*	
	Total France	HVG Audience	Total France	HVG Audience
Winter	34%	42% ⊕	6,542,000	1,762,500
Spring	51%	61% ⊕	9,832,500	2,566,000
Summer	62%	59%	12,033,000	2,453,000
Fall	52%	65% ⊕	10,066,000	2,725,000

** Calculation: Total potential long-haul pleasure travellers aged 18 years or more (19,470,500) x total in France typically travel during season*

** Calculation: Total potential HVG travellers (4,186,000) x total HVG typically travel during season*

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

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

Top of Mind Fall/Winter Destinations

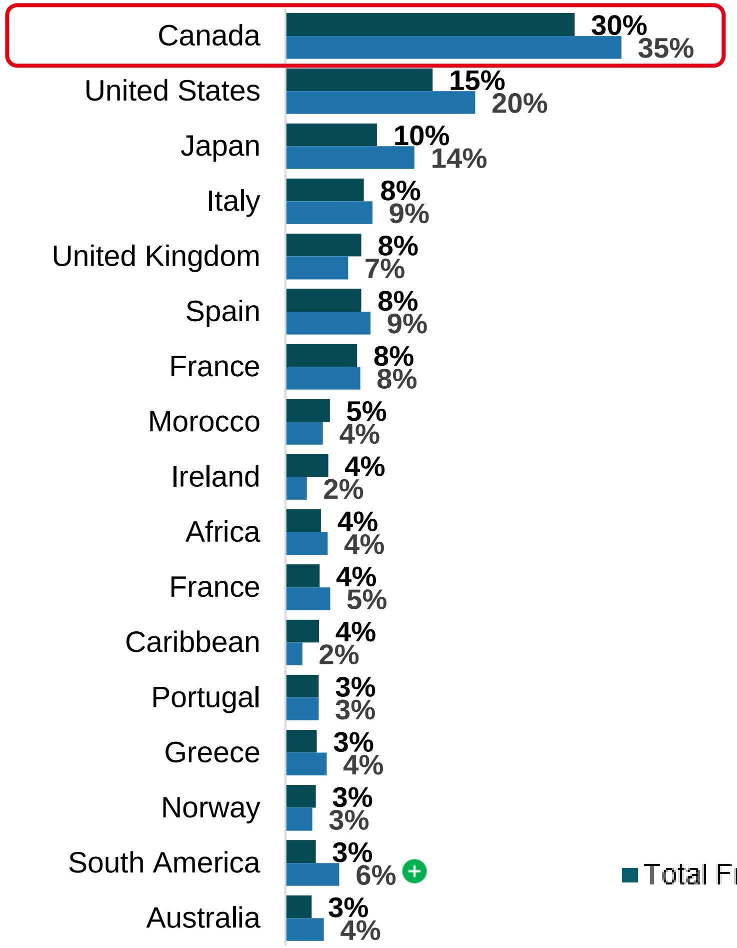
DESTINATION CANADA

Canada tops mentions as a place to experience the Fall season by a large margin, doubling mentions of the next highest destination the US. Canada also leads Winter season mentions, followed more closely by Finland and Norway.

Fall

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.

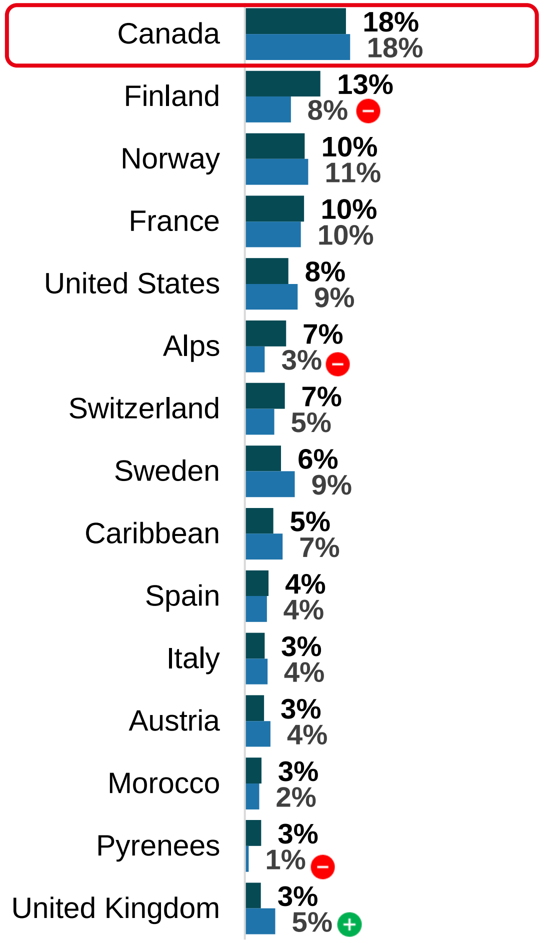


Total France HVG Audience

Winter

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.



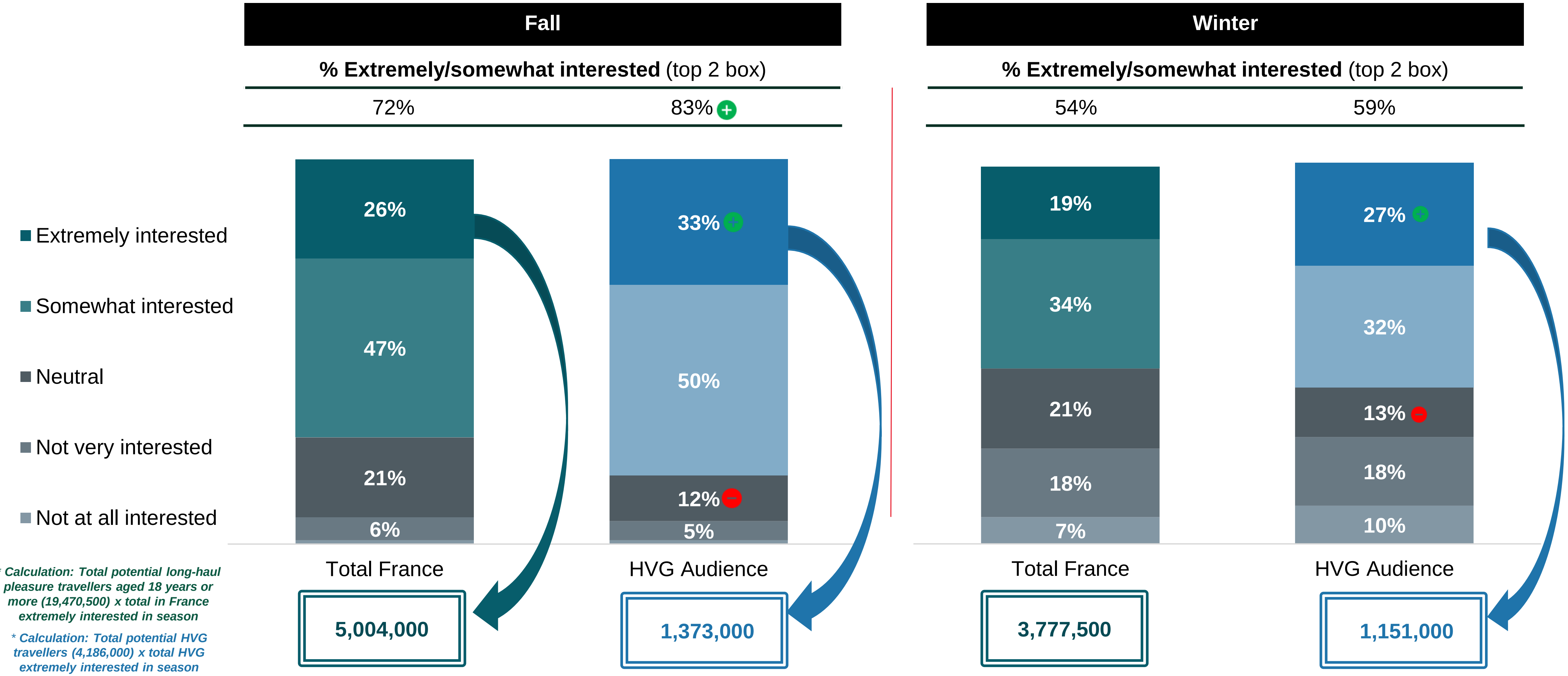
Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3) Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip. (n=746); HVG (n=172)
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 Europe, North Africa and the Mediterranean.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip. (n=758); HVG (n=159)

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

Interest in Fall/Winter Holidays

DESTINATION CANADA

5 million French travellers express extreme interest for travelling to a destination during it's Fall season. Approximately 3.8 million French consider travel during a destination's Winter season. Notably, HVGs exhibit a heightened level of interest in both Fall and Winter holidays.



** Calculation: Total potential long-haul pleasure travellers aged 18 years or more (19,470,500) x total in France extremely interested in season*

** Calculation: Total potential HVG travellers (4,186,000) x total HVG extremely interested in season*

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)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=746); HVG (n=172)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=758); HVG (n=159)

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

Potential Market Size For Canada in Fall/Winter

Over the next 2 years, Canada has the potential to draw in 6 million French travellers during the Fall season and nearly 4 million during the Winter months. The Fall season has potential for 1.6 million HVGs and the Winter season around 750,000 HVGs.

Total potential travellers aged 18 years or more		**Target Market for Canada** Those in the dream to purchase stages of the path to purchase for Canada		Size of the target market		**Consideration for Canada in [SEASON] in N2Y**		Immediate potential for Canada in N2Y
Long haul pleasure travellers 19,470,500	x	74.0%	=	14,408,000	x	Fall: 41.9%	=	Fall: 6,037,000
						Winter: 27.1%		Winter: 3,904,500
HVG travellers 4,186,000	x	79.6%	=	3,332,000	x	Fall: 46.8%	=	Fall: 1,559,500
						Winter: 22.7%		Winter: 756,500

C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each) Total (n=1504); HVG (n=331)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1113); HVG (n=262)

Fall/Winter Conversion – Total France

About half of those who typically travel during the Fall and Winter months are extremely interested in visiting a destination during it's Fall and Winter seasons. There are more people interested in visiting Canada during both the Fall and Winter seasons than those who express extreme interest – this presents a strong opportunity for Canada to convert travellers during these seasons.

Fall

Demand During Fall Months (any destination): 10,066,000

50%

Extremely Interested in Visiting a Destination During its Fall Season (any destination): 5,004,000

121%

Next 2 Year Immediate Potential for CANADA During Fall Season: 6,037,000

Winter

Demand During Winter Months (any destination): 6,542,000

58%

Extremely Interested in Visiting a Destination During its Winter Season (any destination): 3,777,500

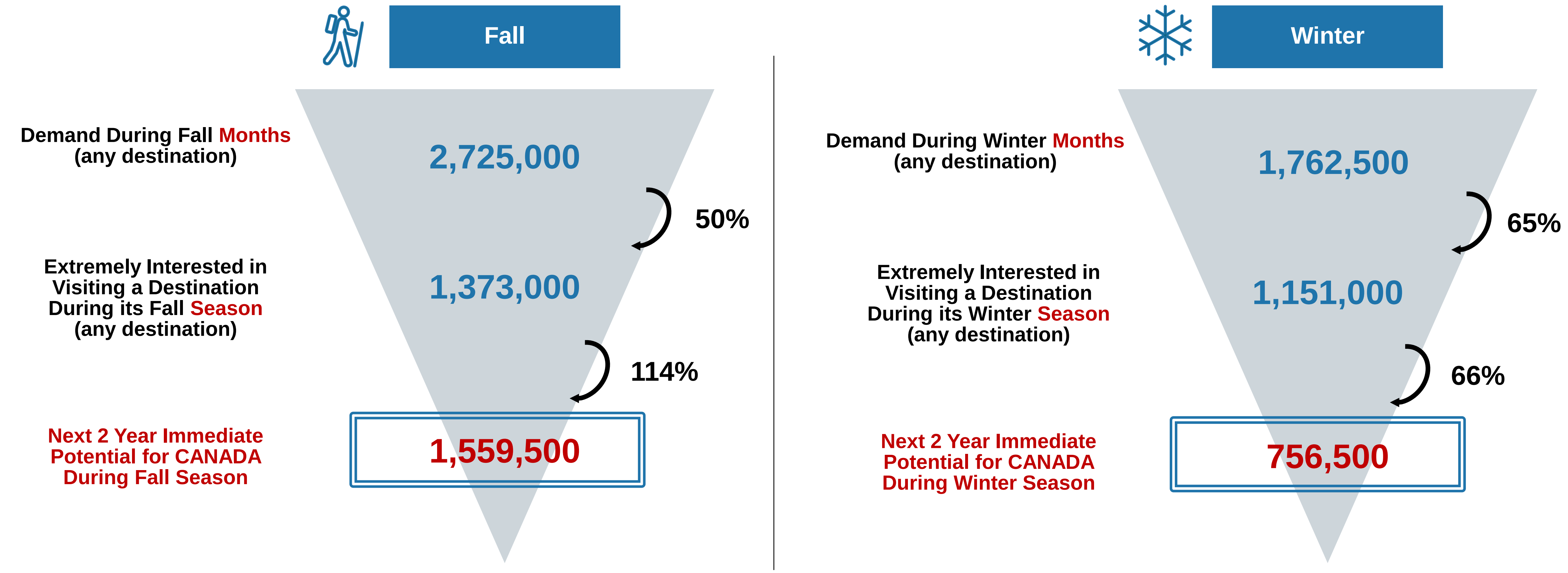
103%

Next 2 Year Immediate Potential for CANADA During Winter Season: 3,904,500

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply. Total (n=1504)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? Total (n=746)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=758)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1113)

Fall/Winter Conversion – Among HVG Audience

About half of HVGs who typically travel during the Fall and two thirds who typically travel during the Winter are extremely interested in visiting a destination during its Fall and Winter season respectively. There is a strong opportunity to convert HVGs during the Fall, with interest in visiting Canada greater than those who express extreme interest. For Winter, the potential to convert HVGs is moderate and significantly lower compared to total travellers.



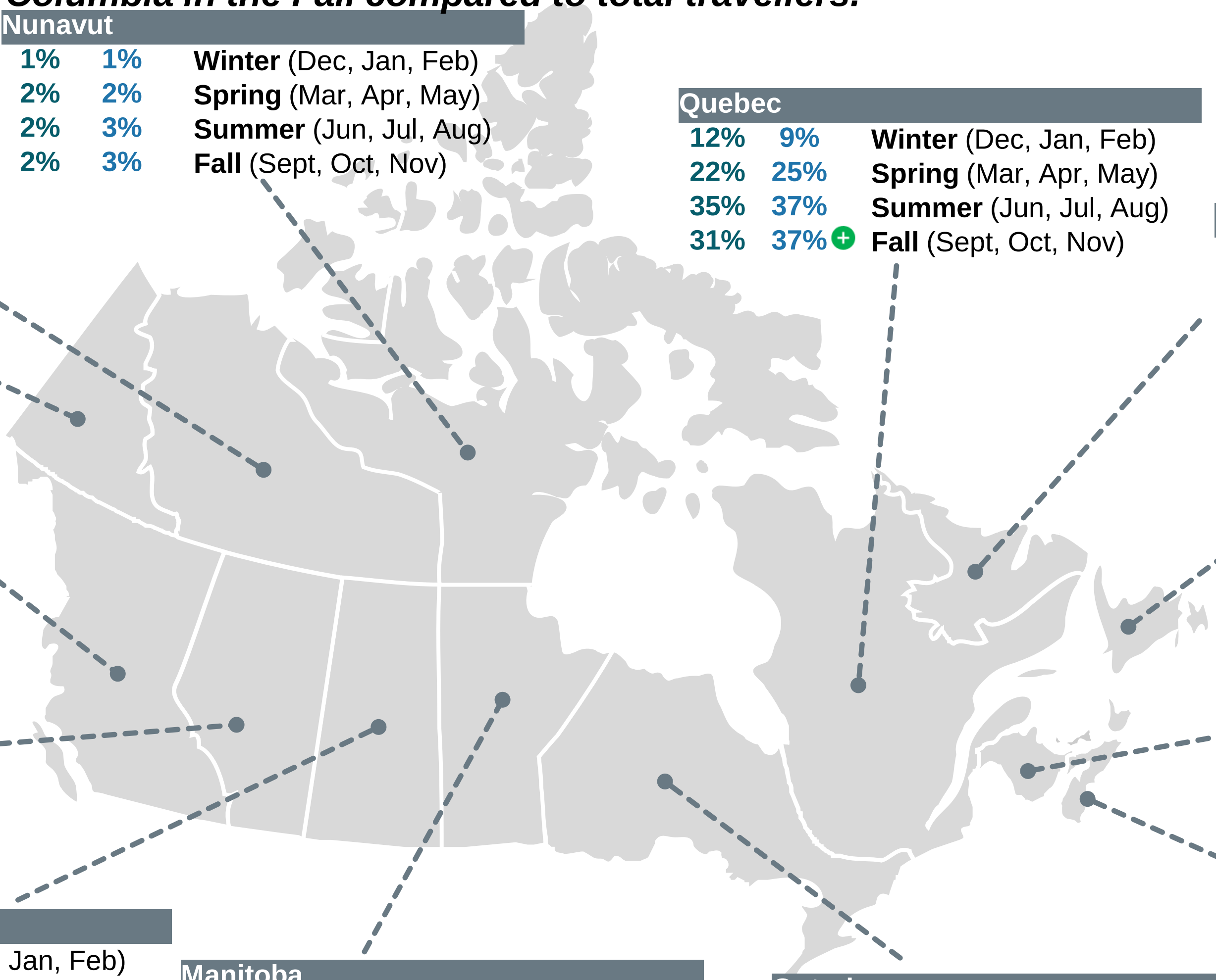
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG audience
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply. HVG (n=331)
D3. In general, how interested are you in taking a holiday trip to a destination during <u>**its autumn season**</u>? HVG (n=172)
D2. In general, how interested are you in taking a holiday trip to a destination during <u>**its winter season**</u>? HVG (n=159)
C7. For each of the following destinations, during which months would you consider taking a holiday trip <u>in the next 2 years</u>? HVG (n=262)

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

DESTINATION CANADA

Quebec leads in popularity for all seasons, followed by Ontario and British Columbia. HVGs are more likely to be interested in Quebec and British Columbia in the Fall compared to total travellers.

Total France | HVG Audience



Northwest Territories

Total France	HVG Audience	
1%	1%	**Winter** (Dec, Jan, Feb)
4%	5%	**Spring** (Mar, Apr, May)
5%	7%	**Summer** (Jun, Jul, Aug)
3%	5%	**Fall** (Sept, Oct, Nov)

Nunavut

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

Quebec

Total France	HVG Audience	
12%	9%	**Winter** (Dec, Jan, Feb)
22%	25%	**Spring** (Mar, Apr, May)
35%	37%	**Summer** (Jun, Jul, Aug)
31%	37% +	**Fall** (Sept, Oct, Nov)

Yukon

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

Newfoundland & Labrador

Total France	HVG Audience	
2%	2%	**Winter** (Dec, Jan, Feb)
6%	8%	**Spring** (Mar, Apr, May)
7%	8%	**Summer** (Jun, Jul, Aug)
7%	8%	**Fall** (Sept, Oct, Nov)

British Columbia

Total France	HVG Audience	
6%	5%	**Winter** (Dec, Jan, Feb)
12%	15%	**Spring** (Mar, Apr, May)
16%	22% +	**Summer** (Jun, Jul, Aug)
11%	16% +	**Fall** (Sept, Oct, Nov)

Prince Edward Island

Total France	HVG Audience	
1%	- −	**Winter** (Dec, Jan, Feb)
4%	4%	**Spring** (Mar, Apr, May)
5%	5%	**Summer** (Jun, Jul, Aug)
4%	5%	**Fall** (Sept, Oct, Nov)

Alberta

Total France	HVG Audience	
4%	5%	**Winter** (Dec, Jan, Feb)
8%	13% +	**Spring** (Mar, Apr, May)
9%	13% +	**Summer** (Jun, Jul, Aug)
8%	9%	**Fall** (Sept, Oct, Nov)

New Brunswick

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

Nova Scotia

Total France	HVG Audience	
2%	1%	**Winter** (Dec, Jan, Feb)
4%	5%	**Spring** (Mar, Apr, May)
7%	8%	**Summer** (Jun, Jul, Aug)
6%	10% +	**Fall** (Sept, Oct, Nov)

Saskatchewan

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

Manitoba

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

Ontario

Total France	HVG Audience	
6%	2% −	**Winter** (Dec, Jan, Feb)
16%	18%	**Spring** (Mar, Apr, May)
22%	21%	**Summer** (Jun, Jul, Aug)
19%	22%	**Fall** (Sept, Oct, Nov)

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1113); HVG (n=262)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

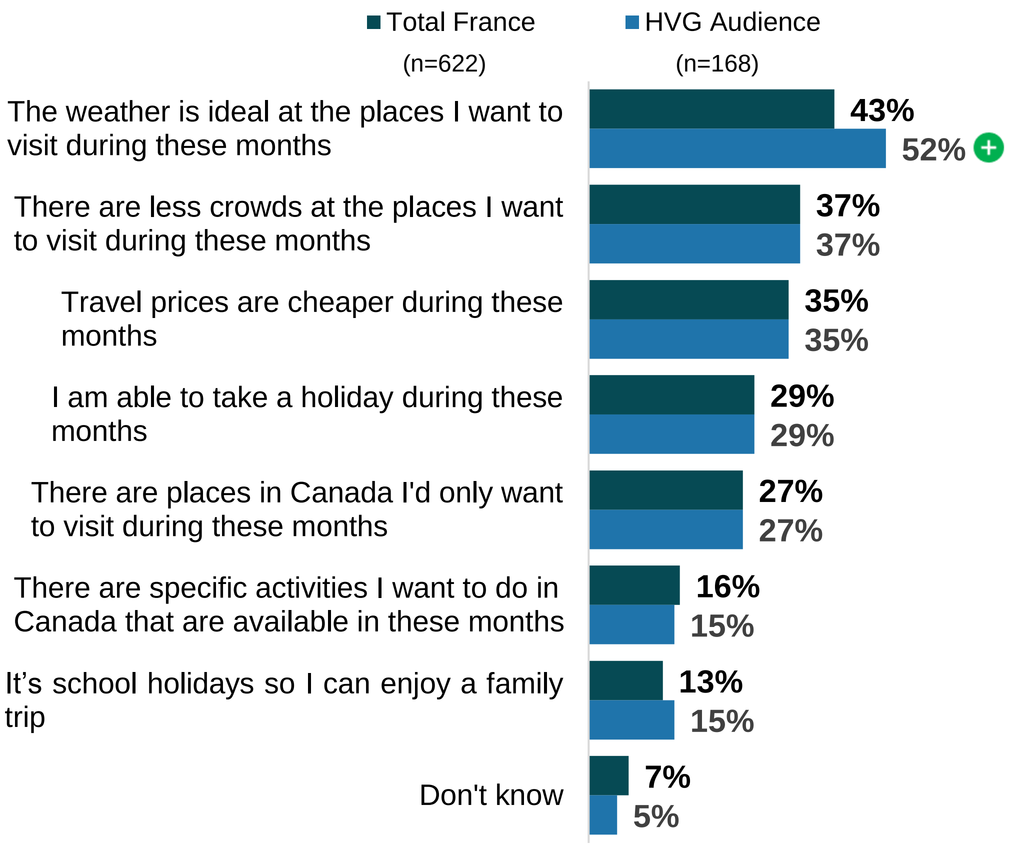
+ / − = significantly higher/lower result (vs. Total)

Motivators & Barriers for Fall Travel to Canada

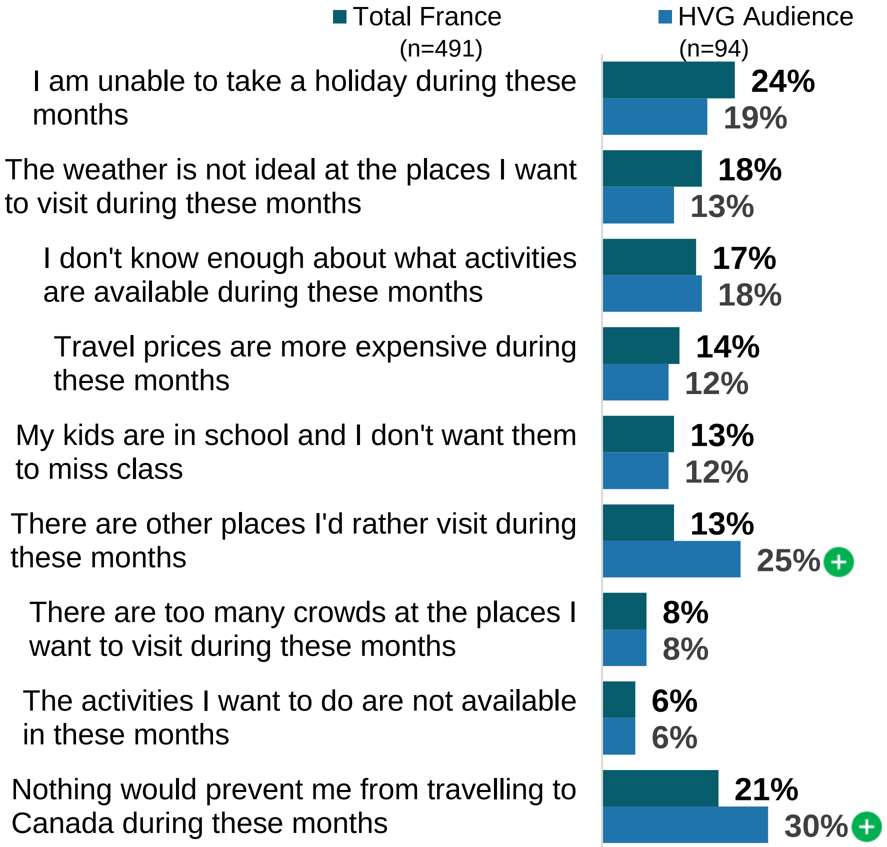
DESTINATION CANADA

The strongest motivator for Fall travel is the weather, but top barriers include both holiday constraints and weather concerns. Of note, a significant number of HVGs mention a preference for other destinations as the main barrier to visiting Canada.

Motivators for Fall Travel



Barriers for Fall Travel

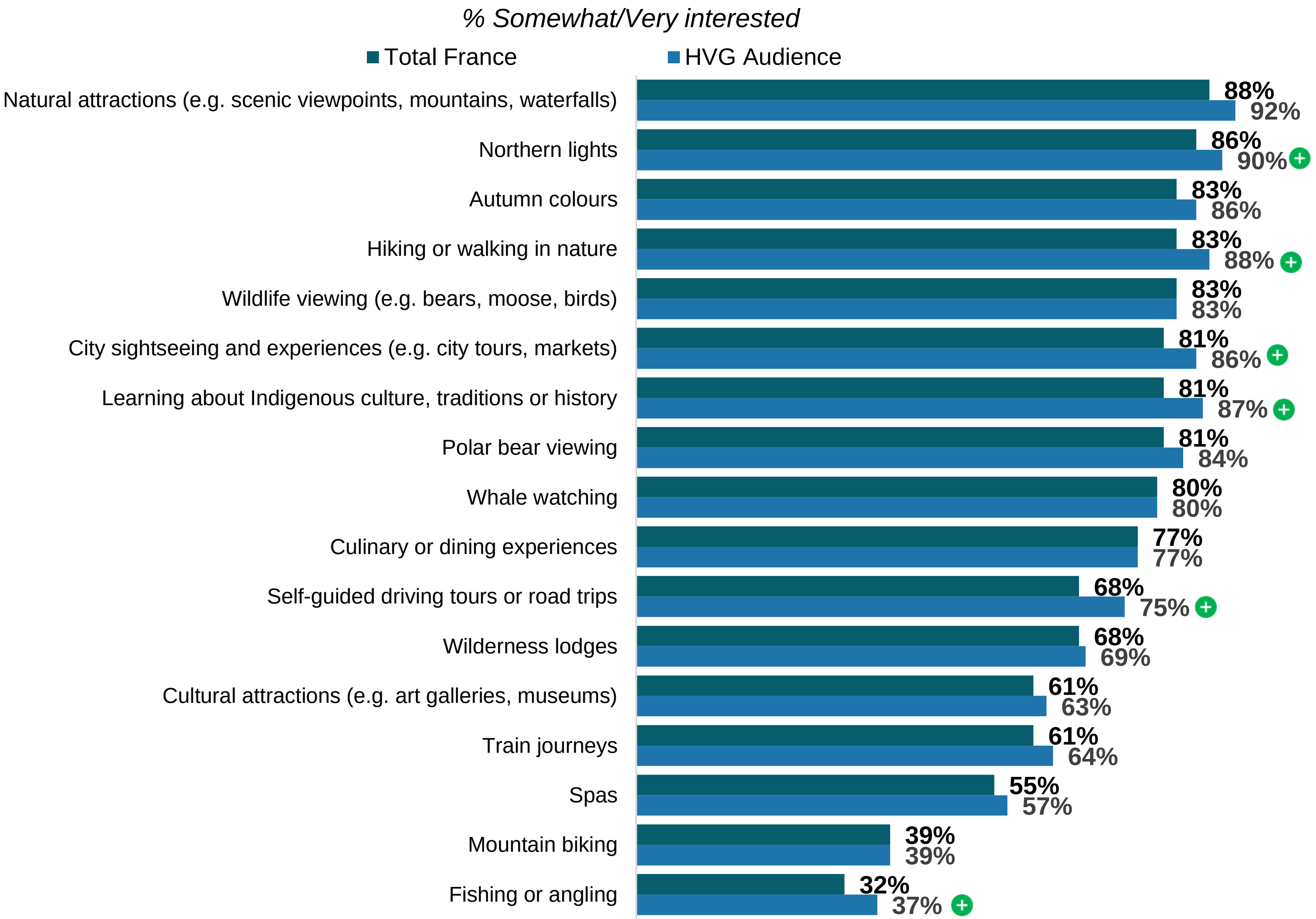


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or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

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

Interest in Fall Activities in Canada

Popular Fall activities in Canada are centered around nature, featuring natural attractions, the Northern lights, and Fall colours. HVGs exhibit a similar preference pattern but to a greater extent overall.



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1113); HVG (n=262)
E11. What is your level of interest in the following activities or experiences in Canada during the **autumn season**?

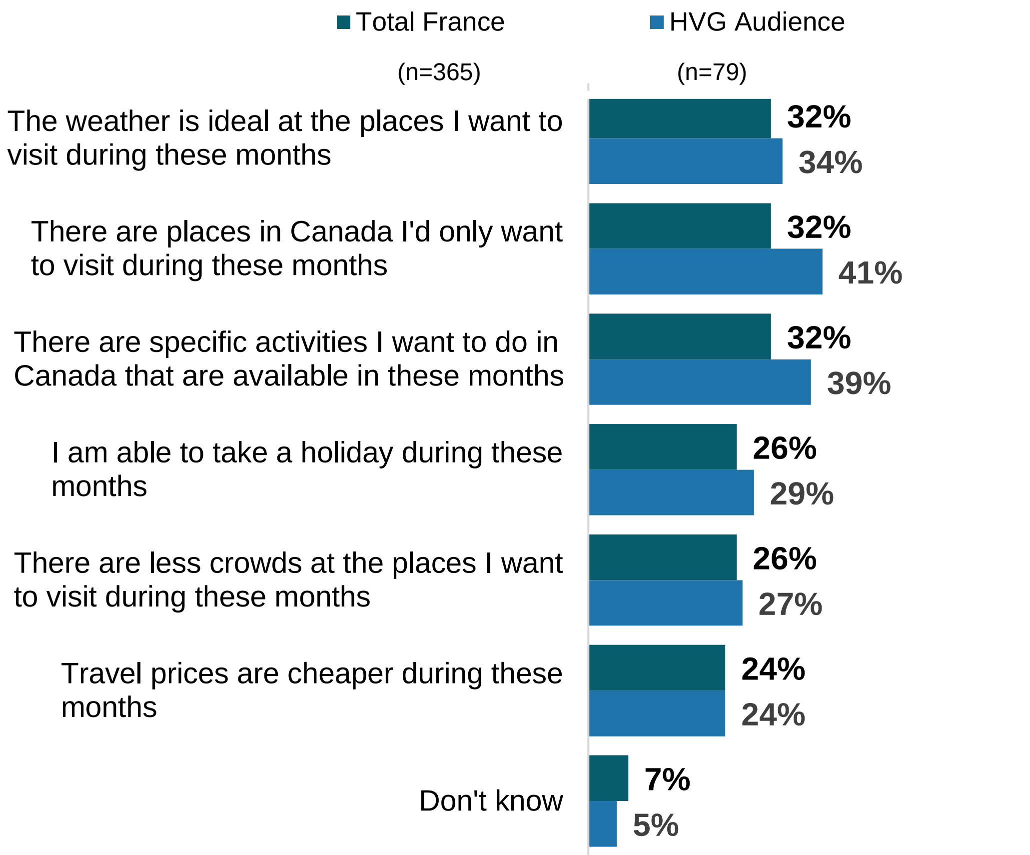
+ / – = significantly higher/lower result (vs. Total)

Motivators & Barriers for Winter Travel to Canada

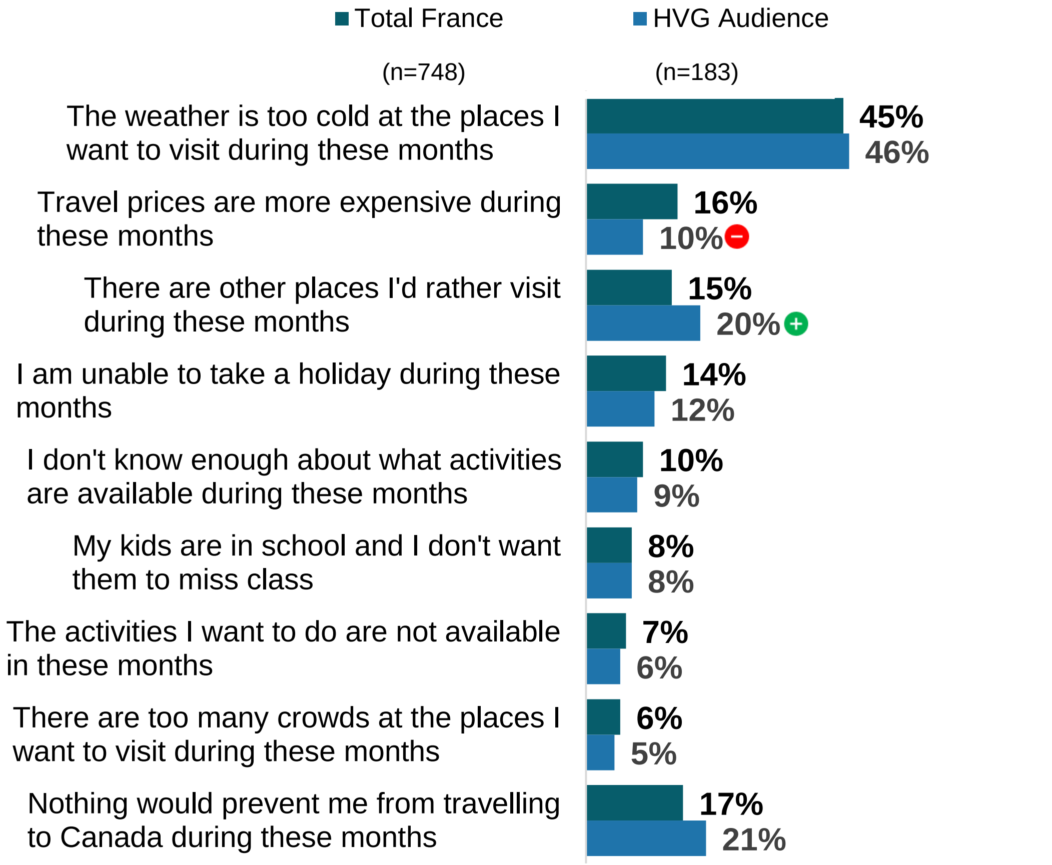
DESTINATION CANADA

Winter trips to Canada are influenced by weather and specific locations and activities associated with the Winter months. The primary barrier is weather-related.

Motivators for Winter Travel



Barriers for Winter Travel



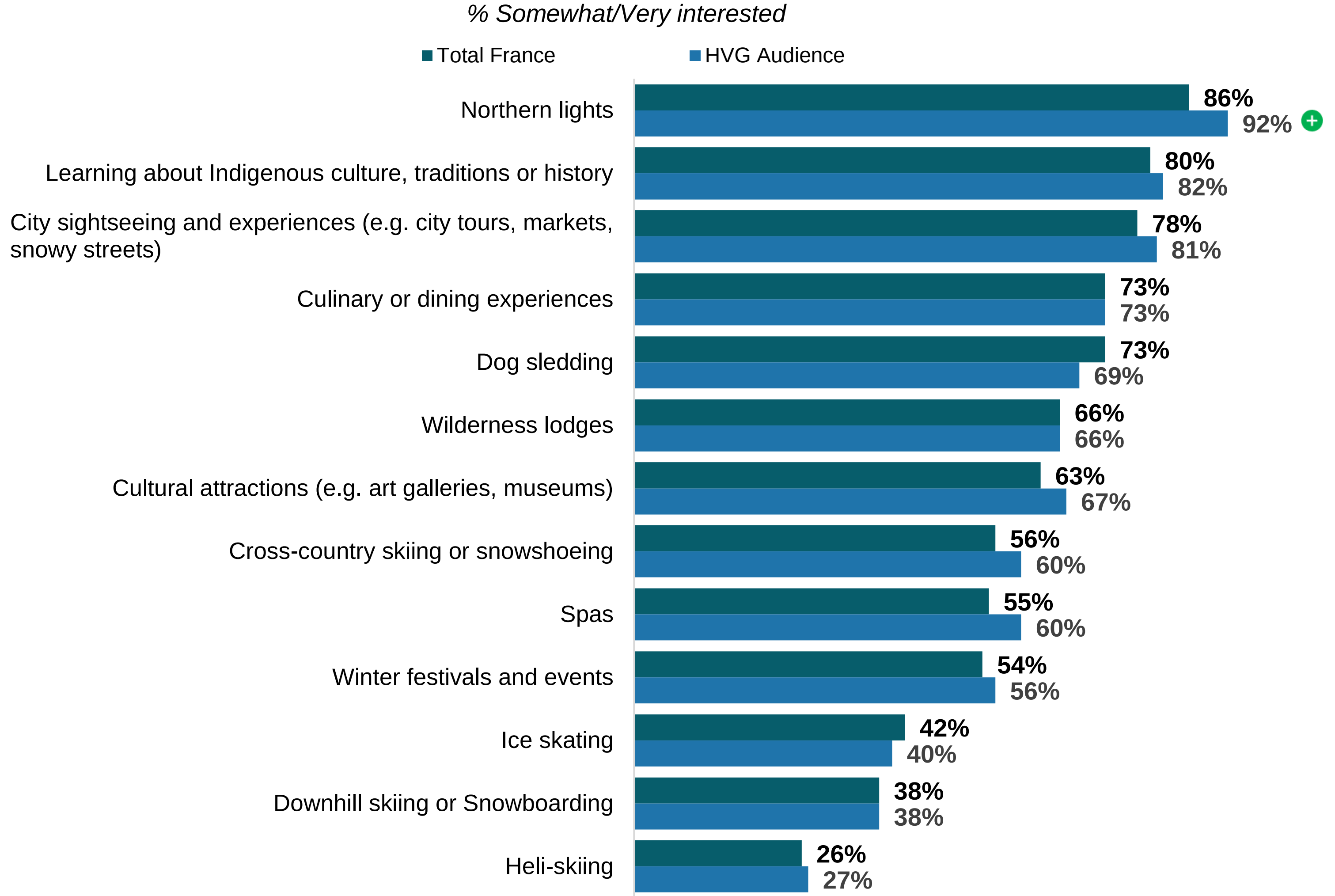
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February…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

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

Interest in Winter Activities in Canada

DESTINATION CANADA

Top Winter activities in Canada encompass Northern lights viewing, experiencing Indigenous culture and exploring city sights.



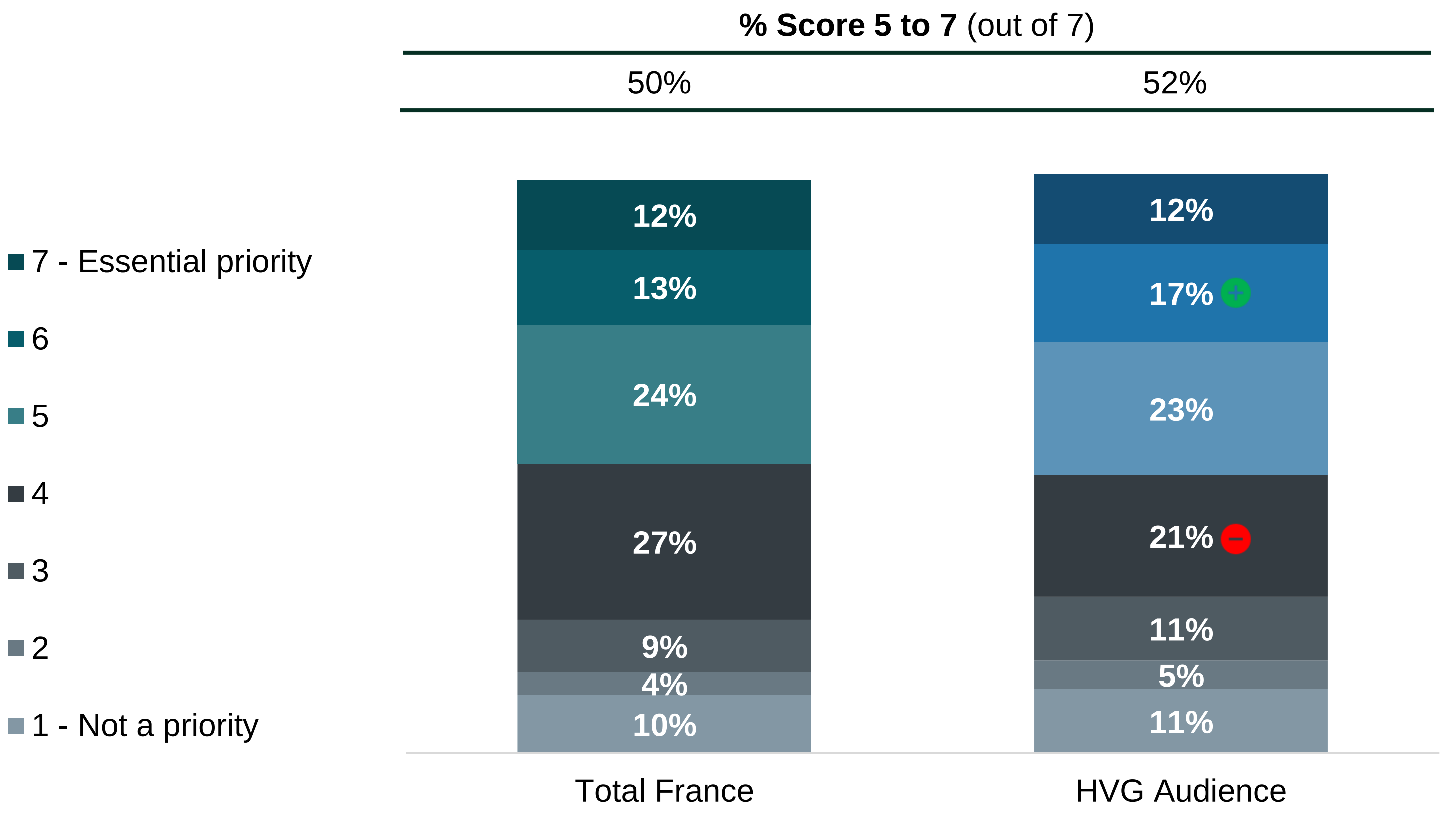
Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1113); HVG (n=262)
E10. What is your level of interest in the following activities or experiences in Canada during the **winter season**?

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

Sustainability

Priority of Sustainable Travel When Planning a Trip

Sustainability is a moderate priority for French travellers when planning a trip. Canada falls behind Iceland as an environmentally-friendly destination and is comparable to Iceland in terms of social responsibility.



% Associate [DESTINATION] with…	***Is an environmentally friendly travel destination***	
	Total FR	**HVG**
Canada	**46%**	**47%**
Iceland	**54%**	**59%**

% Associate [DESTINATION] with…	***Is a socially responsible travel destination***	
	Total FR	**HVG**
Canada	**45%**	**47%**
Iceland	**40%**	**45%**

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".

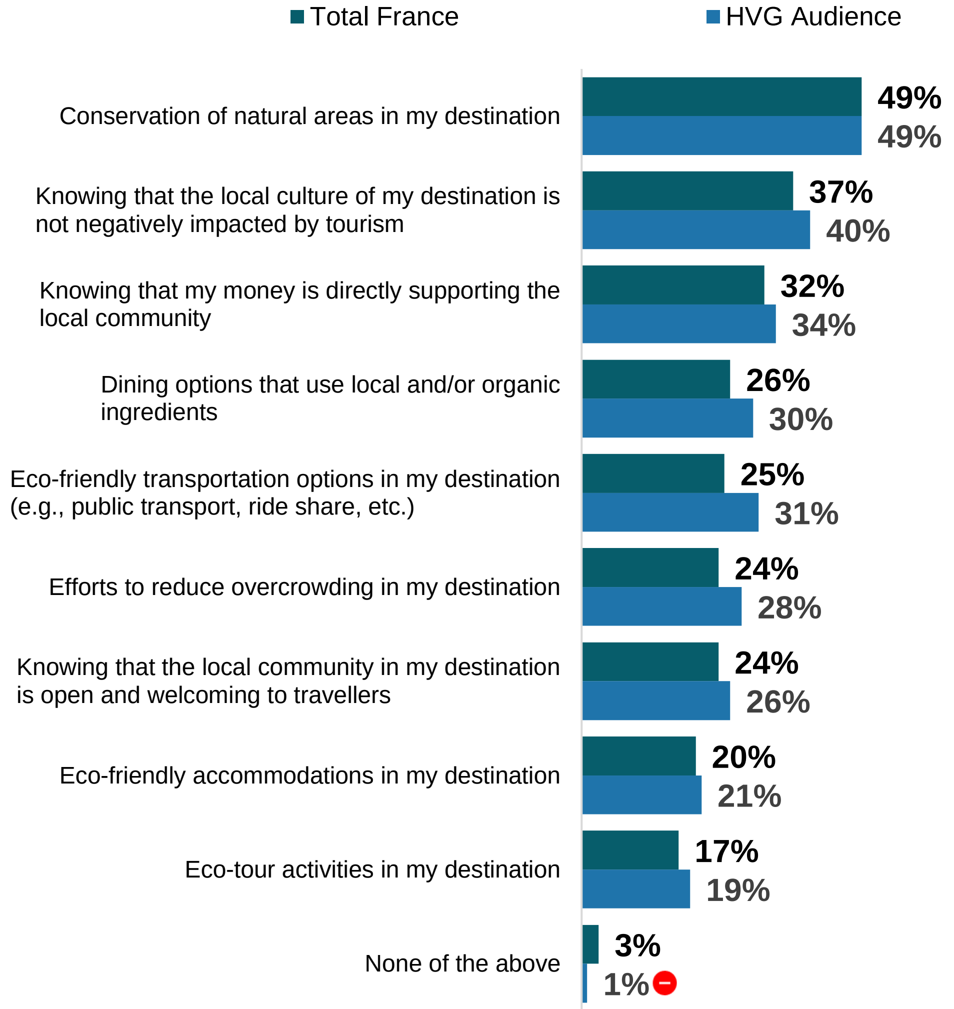
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

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

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

The most important sustainability efforts for French travellers are the conservation of natural areas, the local culture is not negatively impacted by tourism and monetary funding goes directly to support local community. HVGs share similar preferences.



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".

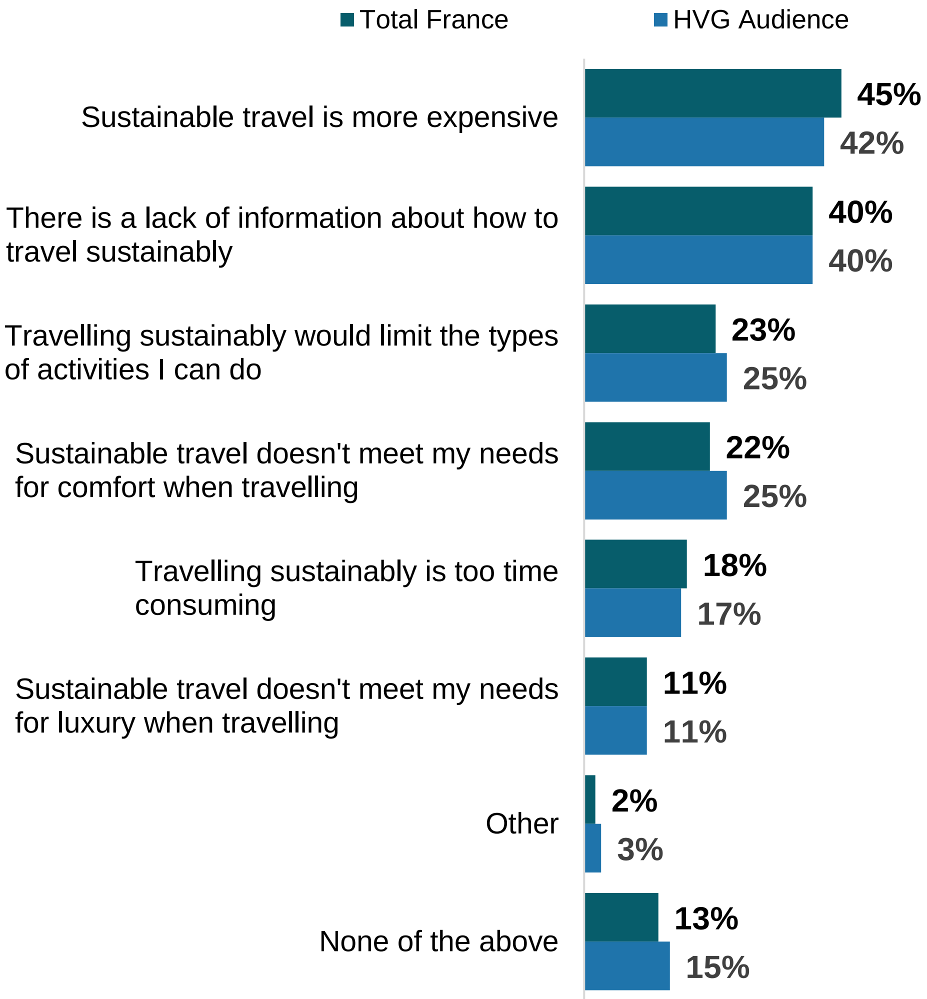
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Rated 5-7 at D7 (n=745); HVG (n=171)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

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

Barriers to Sustainable Travel

DESTINATION CANADA

The primary barriers to sustainable travel are the perceived higher costs and a lack of information which is a sentiment shared by both total travellers and the HVG audience.



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=1504); HVG (n=331)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

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

Indigenous Tourism

Unaided Mentions – Indigenous Cultural & Tourism Activities

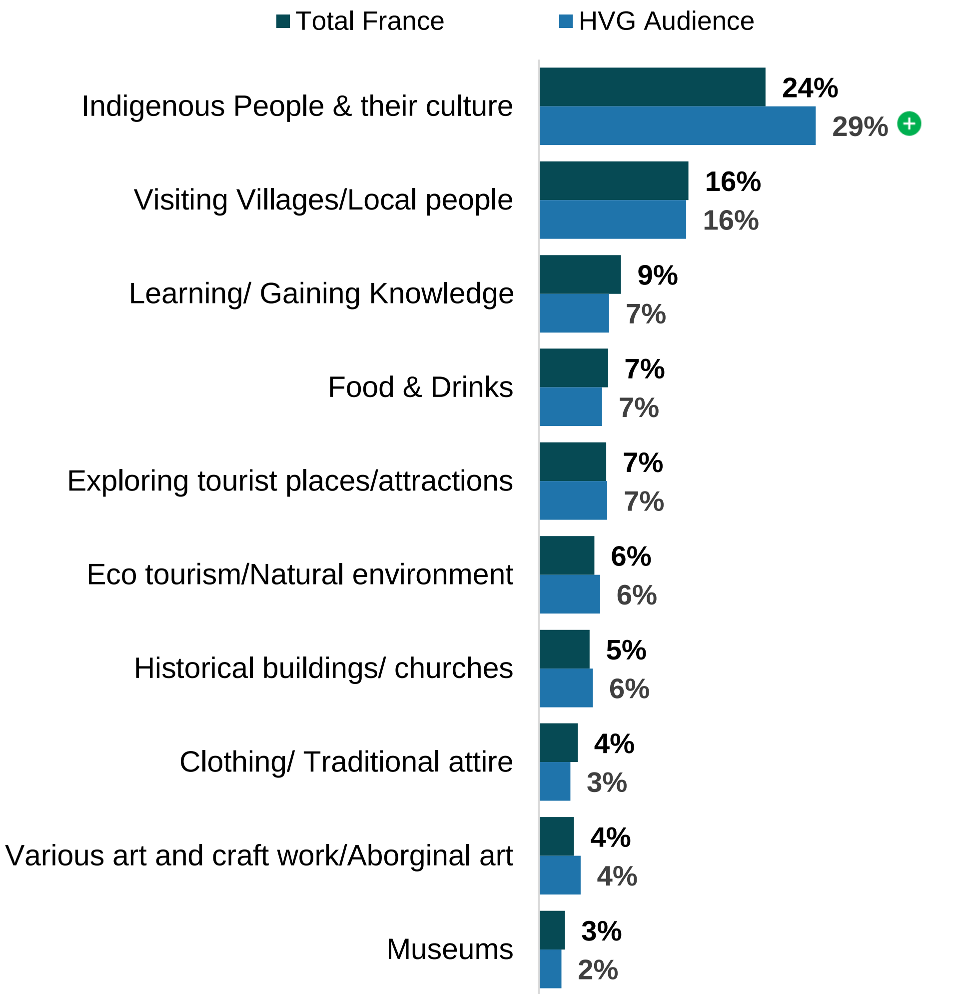
DESTINATION CANADA

People and culture is the most prevalent activity associated to Indigenous tourism, followed by visiting villages and local people. Australia leads in Indigenous tourism destinations, with Canada ranking 2nd.

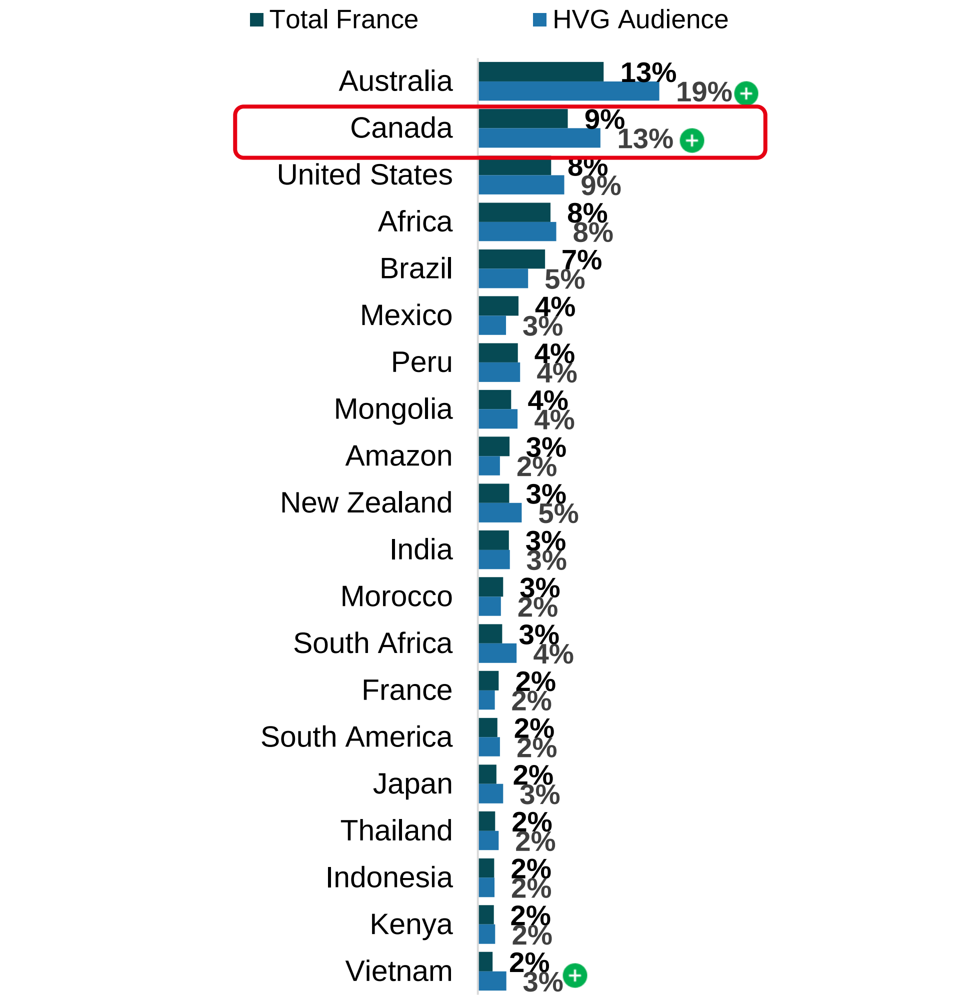
Indigenous Peoples Description

Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people.

Activities



Tourism Destinations



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.) Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

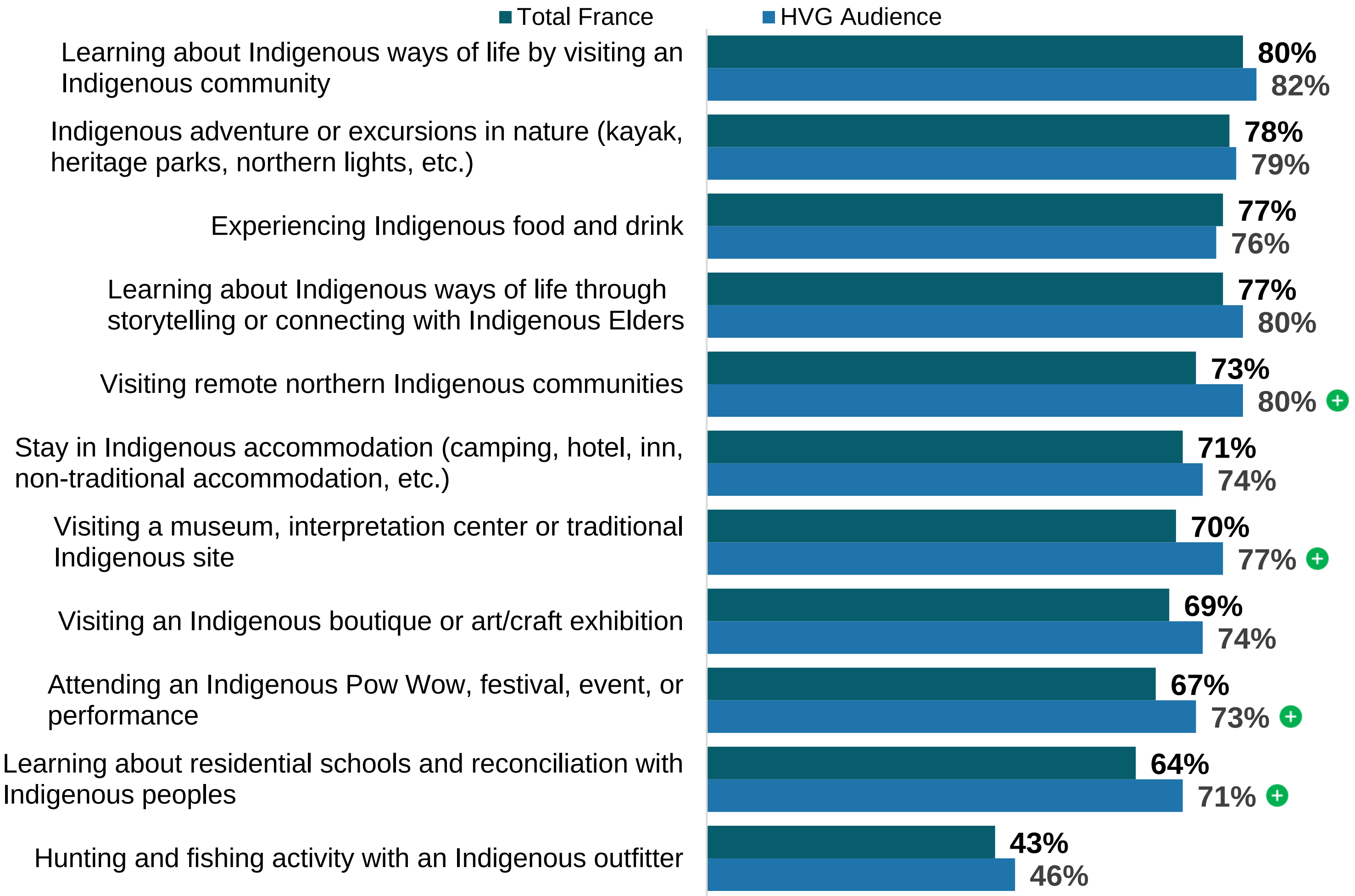
+ / − = significantly higher/lower result (vs. Total)

Interest in Indigenous Cultural & Tourism Activities

DESTINATION CANADA

Visiting Indigenous communities, excursions in nature, food and drink, and storytelling/connecting with elders are of greatest interest to French travellers to experience Indigenous culture in Canada. HVGs are more interested than total travellers in visiting remote Northern Indigenous communities, museums, festivals, and learning about residential schools and reconciliation.

% Somewhat/Very interested



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=1113); HVG (n=262)
E12. [DESCRIPTION] What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada?

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

THANK YOU

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