2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT
TOTAL FRANCE VS. HIGH VALUE GUEST AUDIENCE

DESTINATION **CANADA**

CANADIAN TOURISM DATA
collective

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France GTRP – December 2023

Kananaskis Country
Alberta

Study Overview: France 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 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**

- 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.

Market Sizing

Incidence of Long-Haul Pleasure Travel (General Population)

DESTINATION CANADA

Plan to Take Long-Haul Pleasure Trip in Next 2 Years
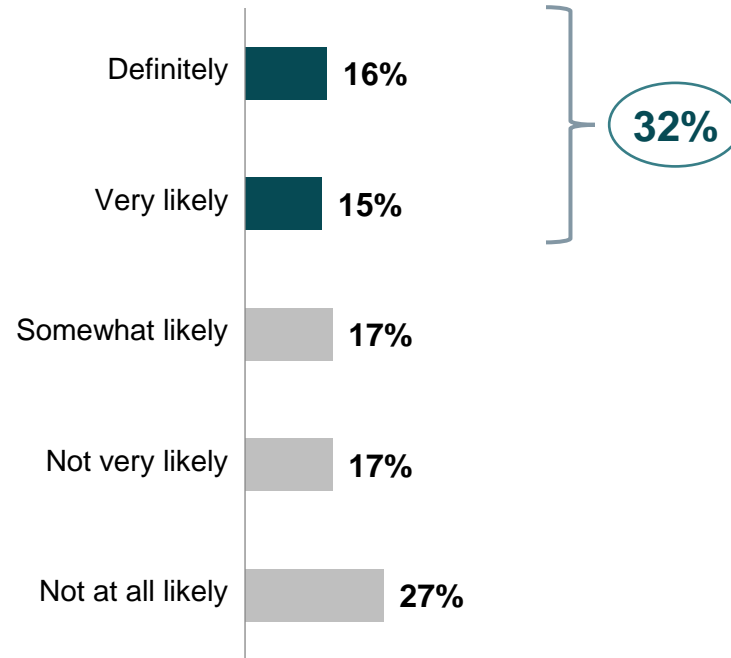
28%

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

Category	Value
Definitely	16%
Very likely	15%
Somewhat likely	17%
Not very likely	17%
Not at all likely	27%

32%

Incidence Rate

37.9%

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

^ Long-haul = outside of Europe, North Africa and the Mediterranean
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=1047)

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Long-Haul Pleasure Traveller Sizing

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Total population aged 18 years or more[1]

Incidence rate

Size of the target market

51,373,500

x

37.9%

=

19,470,500

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)
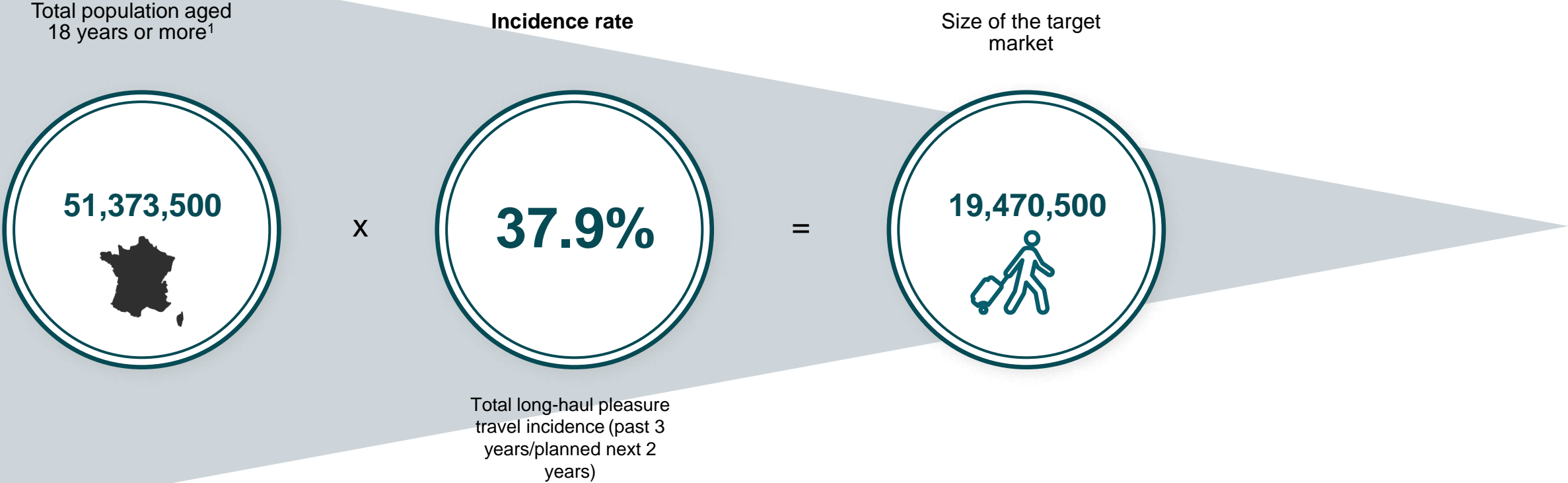
[1] Source: Estimates Jan 2020, Institut national de la statistique et des études économiques
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=1047)

Potential Market Size For Canada

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

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

19,470,500

X

Target Market for Canada

74.0%

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

=

Size of the target market

14,408,000

X

Immediate Potential for Canada

47.9%

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

=

Immediate potential

6,901,500
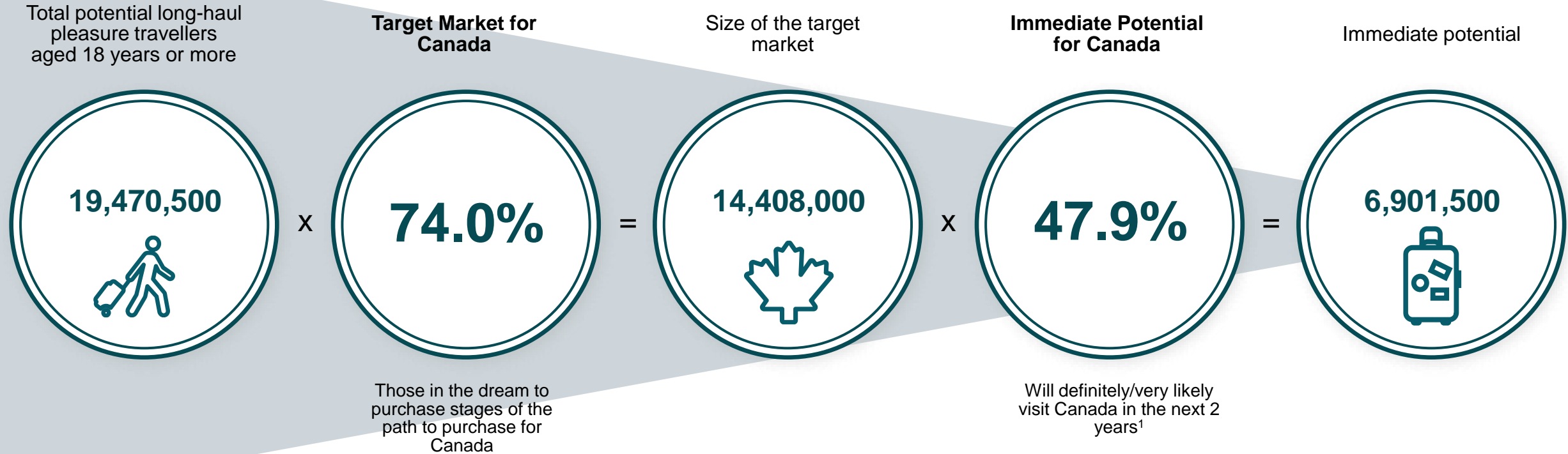
[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1113)
C1. 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
19,470,500	X	**21.5%**	=	**4,186,000**	X	**79.6%**	=	**3,332,000**	X	**63.3%**	=	**2,109,000**

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]

Potential Market Size for the Regions

DESTINATION CANADA

Total France

HVG Audience

Immediate Potential for Canada:
Total France:	**6,901,500**
HVG Audience:	**2,109,000**

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

YT
8.5% 9.2%
587 *194*

NWT
10.0% 11.7%
690 *247*

NU
5.4% 6.0%
373 *127*

NL
17.1% 18.0%
1,180 *380*

PEI
10.4% 11.8%
718 *249*

BC
34.5% 41.0%
2,381 *865*

AB
23.3% 27.8%
1,608 *587*

MB
9.2% 12.0%
635 *253*

QC
75.5% 75.6%
5,211 *1,595*

NB
6.1% 6.1%
421 *129*

SK
8.3% 10.9%
573 *230*

ON
49.3% 44.3%
3,403 *935*

NS
15.0% 19.1%
1,035 *403*

9

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=1113); HVG (n=262)
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

Key Performance Indicators

Indicator	Definition	All Long-haul Travellers (n=1504)	HVG Audience (n=331)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[1]	**12%**	**18%** ⊕
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	**51%**	**59%** ⊕
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	**40%**	**53%** ⊕
Past visitation	% who have ever visited Canada for pleasure	**30%**	**48%** ⊕

[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 Europe, North Africa and the Mediterranean** 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 Europe, North Africa and the Mediterranean** which was 4 or more nights long?

⊕ / ⊖ = 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]	**30%**	**35%**
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November[2]	**42%**	**47%**
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada[1]	**18%**	**18%**
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February[2]	**27%**	**23%**
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	**9%**	**13%** ⊕

[1]Among respondents who answered about winter/fall travel
[2]Among those in the dream to purchase stages of the path to purchase to Canada
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=758); HVG (n=159)
B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=746); HVG (n=172)
C7. For each of the following destinations, during which months would you consider taking a holiday trip <u>in the next 2 years</u>? Total (n=1113); HVG (n=262)
B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1504); HVG (n=331)

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

Market Outlook

Market Outlook

Indicator	Definition	All Long-haul Travellers (n=1504)	HVG Audience (n=331)
Incidence of long-haul pleasure travel	% who have taken a long-haul pleasure trip in the past 3 years	**74%**	**100%** ➕
Long-haul travel intentions	% who plan[1] to take a long-haul pleasure trip in the next 2 years	**76%**	**100%** ➕
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of Europe, North Africa and the Mediterranean in the next 12 months MINUS % who will <u>spend a little less</u>	**-16%**	**+11%**

[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 Europe, North Africa and the Mediterranean** 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 Europe, North Africa and the Mediterranean** 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…

Spending Intentions (in Next 12 Months)

	Travelling within France		Travelling within Europe, North Africa and the Mediterranean		Travelling outside Europe, North Africa and the Mediterranean	
	Total France	HVG Audience	Total France	HVG Audience	Total France	HVG Audience
A little more	16%	20% +	17%	23% +	23%	33% +
About the same	59%	63%	48%	52%	39%	44% +
A little less	25%	17% −	35%	24% −	39%	23% −
Travel Market Outlook	**-10%**	**+3%**	**-17%**	**-1%**	**-16%**	**+11%**

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
A5. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend…

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

Types of Travel Trips

	Total France	HVG Audience

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

Domestic holiday trips (within my home country)
- Total France: 11% | 28% | 30% | 3% — **71%**
- HVG Audience: 7% | 29% | 38% | 6% — **80%**

International holiday trips (outside my home country)
- Total France: 21% | 31% | 13% — **67%**
- HVG Audience: 18% | 40% | 26% | 5% — **89%**

Business trips and meetings (outside my home country)
- Total France: 5% | 5% | 4% — **17%**
- HVG Audience: 6% | 8% | 6% | 5% — **25%**

Trips to attend business conferences or events (outside my home country)
- Total France: 6% | 5% | 3% — **15%**
- HVG Audience: 7% | 9% | 5% | 4% — **25%**

Added personal holiday days to a business trip
- Total France: 5% | 5% | 2% — **14%**
- HVG Audience: 5% | 9% | 5% — **21%**

Holiday trips where I choose to also work remotely from my destination
- Total France: 5% | 5% | 3% — **16%**
- HVG Audience: 8% | 6% | 5% | 4% — **23%**

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)

Long-Haul Travel Intensity

% Taking 3 or more Trips

| | 36% | 73% ⊕ |

Total France
- 5+ trips: 14%
- 3 to 4 trips: 21%
- 2 trips: 18%
- 1 trip: 21%
- No trip: 26%

HVG Audience
- 5+ trips: 33% ⊕
- 3 to 4 trips: 39% ⊕
- No trip: 27% ⊕

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
A8. How many holiday trips have you taken in the past 3 years?

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

Canada vs. Competitors

Peggy's Cove
Nova Scotia

Past Visitation

	Total France			HVG Audience		
	Visited more than 3 years ago	Visited in the past 3 years	*Ever visit*	Visited more than 3 years ago	Visited in the past 3 years	*Ever visit*
United States	31%	16%	*47%*	36% ⊕	31% ⊕	*67%* ⊕
Canada	21%	9%	*30%*	28% ⊕	19% ⊕	*48%* ⊕
Thailand	21%	7%	*28%*	34% ⊕	13%	*47%* ⊕
Mexico	16%	5%	*21%*	31% ⊕	7%	*39%* ⊕
United Arab Emirates	11%	6%	*17%*	14% ⊕	10% ⊕	*24%* ⊕
China	13%	3%	*16%*	21% ⊕	5% ⊕	*26%* ⊕
India	12%	4%	*15%*	18% ⊕	7% ⊕	*25%* ⊕
Japan	9%	5%	*14%*	16% ⊕	11% ⊕	*27%* ⊕
Australia	10%	4%	*13%*	14% ⊕	8% ⊕	*22%* ⊕
Iceland	8%	4%	*12%*	12% ⊕	9% ⊕	*20%* ⊕
Other	34%	27%	*61%*	29%	42%	*71%* ⊕

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 holiday trip **outside of Europe, North Africa and the Mediterranean** which was 4 or more nights long? ⊕ / ⊖ = significantly higher/lower result (vs. Total)

Unaided Long-Haul Destination Consideration (Next 2 Years)

DESTINATION CANADA

Top Destination Brands[1]

■ Total France ■ HVG Audience

Destination	Total France	HVG Audience
United States	16%	25% ⊕
Canada	11%	17% ⊕
Japan	9%	15% ⊕
Thailand	7%	12% ⊕
Australia	4%	6%
Africa	4%	3%
Mexico	3%	4%
Egypt	3%	2%
Vietnam	3%	4%
Morocco	3%	2%
New York	3%	3%

Top Destinations[2]

■ Total France ■ HVG Audience

Destination	Total France	HVG Audience
United States	20%	31% ⊕
Canada	12%	18% ⊕
Japan	10%	16% ⊕
Thailand	7%	12% ⊕
Australia	4%	6%
France	4%	4%
Africa	4%	3%
Mexico	3%	4%
Egypt	3%	2%
Vietnam	3%	4%
Indonesia	3%	4%
Morocco	3%	2%

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

Path to Purchase for Canada

% NET Active Planning (top 4 box)

	Total France	HVG Audience
	15%	22% ⊕

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

Total France: 3%, 8%, 19%, 40%, 12%, 14%

HVG Audience: 3% ⊕, 7% ⊕, 9%, 25% ⊕, 33% ⊖, 11%, 10% ⊖

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=1504); HVG (n=331)
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 France

DESTINATION CANADA

		NET Active Planning (Top 4 box)
Canada (n=1504)	14% / 12% / 40% / 19% / 8% / 3%	15%
United States (n=501)	12% / 17% / 33% / 23% / 7% / 5%	15%
Japan (n=502)	26% / 14% / 36% / 13% / 7% / 2%	12%
Thailand (n=501)	23% / 18% / 32% / 14% / 7% / 3%	12%
Iceland (n=501)	29% / 12% / 36% / 13% / 8%	11%
Australia (n=501)	27% / 13% / 39% / 11% / 7%	10%
Mexico (n=503)	26% / 21% / 30% / 13% / 5%	10%
United Arab Emirates (n=501)	52% / 18% / 14% / 8% / 5%	9%
India (n=501)	39% / 20% / 24% / 9% / 4%	7%
China (n=501)	39% / 21% / 23% / 10% / 4%	6%

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

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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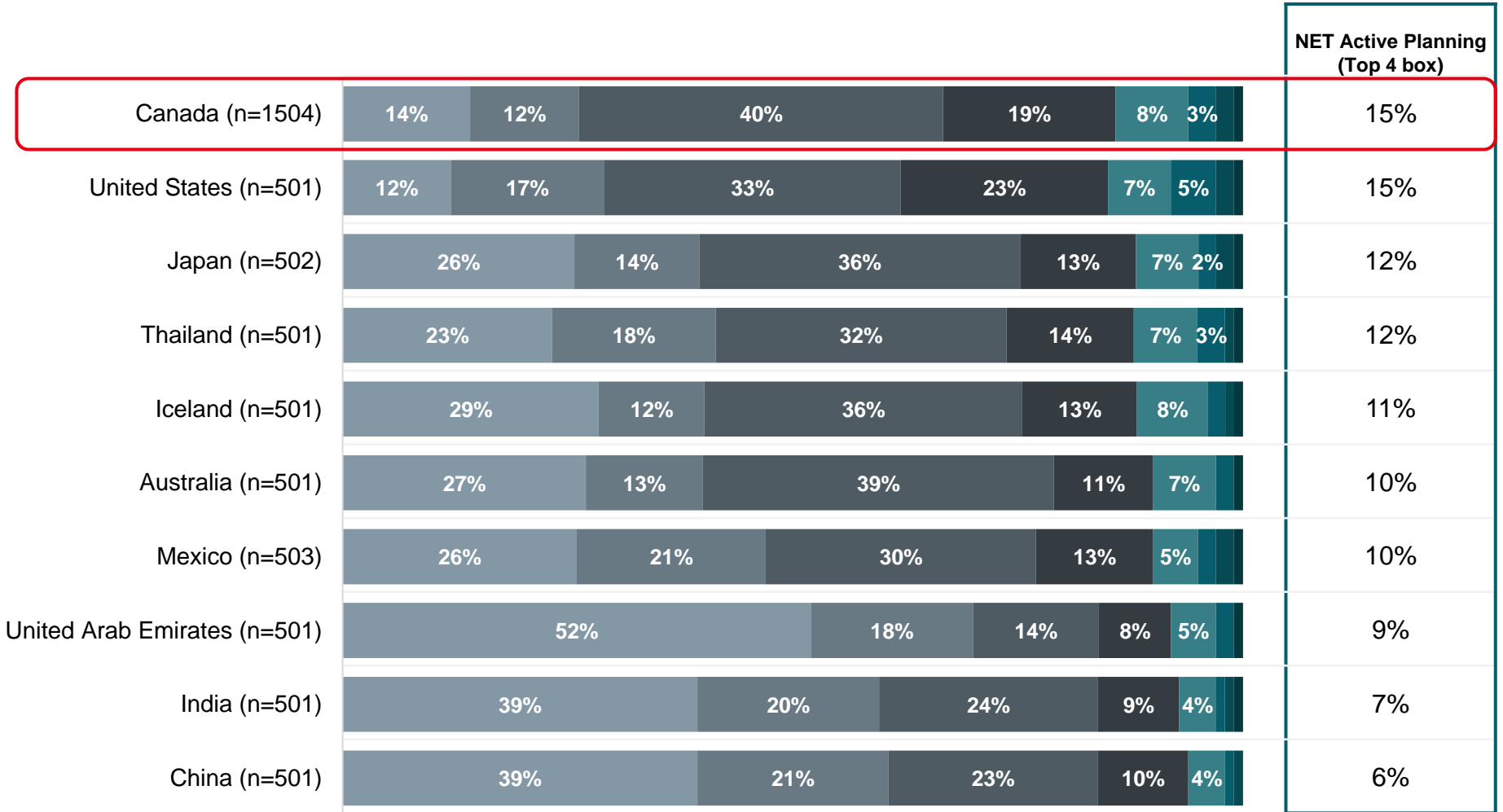
Stage in the Purchase Cycle: Among HVG Audience

NET Active Planning (Top 4 box)

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)
Canada (n=331)	10% ⊖	11%	33% ⊖	25% ⊕	9%	7% ⊕	3% ⊕	22% ⊕
United States (n=127)	9%	15%	26% ⊖	30% ⊕	7%	7%	4%	21% ⊕
Japan (n=104)	15% ⊖	21% ⊕	33%	13%	11%	3%	3%	17% ⊕
Thailand (n=110)	21%	19%	31%	16%	7%	5%		14%
Iceland (n=108)	24%	7%	35%	17%	12%	3%		16%
Australia (n=121)	20%	7% ⊖	42%	15%	11% ⊕			15%
Mexico (n=106)	17% ⊖	21%	28%	22% ⊕	6%	3%		12%
United Arab Emirates (n=130)	50%	23%	13%	7%	4%	4%		7%
India (n=88)	29% ⊖	24%	18%	15%	8% ⊕			14% ⊕
China (n=99)	33%	17%	22%	16% ⊕	9% ⊕			12% ⊕

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 France		HVG Audience	

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

	Total France		HVG Audience	
Canada	25% / 26%	**51%**	25% / 35% ⊕	**59%** ⊕
United States	21% / 29%	**50%**	22% / 38% ⊕	**61%** ⊕
Japan	16% / 21%	**37%**	17% / 27% ⊕	**44%** ⊕
Iceland	20% / 14%	**34%**	21% / 17%	**38%**
Thailand	16% / 17%	**34%**	18% / 25% ⊕	**43%** ⊕
Australia	18% / 13%	**32%**	19% / 19% ⊕	**39%** ⊕
Mexico	14% / 12%	**26%**	17% / 14%	**31%** ⊕
United Arab Emirates	10% / 10%	**20%**	11% / 12%	**23%**
India	10% / 7%	**17%**	14% ⊕ / 10% ⊕	**24%** ⊕
China	9% / 7%	**16%**	13% ⊕ / 7%	**21%** ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
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 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 [DESTINATION]
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)

France GTRP – December 2023

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

Knowledge of Holiday Opportunities

Total France

HVG Audience

■ Very good ■ Excellent *Very good/Excellent*

	Total France				HVG Audience		
Canada (n=1504)	25%	15%	*40%*	Canada (n=331)	29% +	24% +	*53%* +
United States (n=501)	24%	14%	*39%*	United States (n=127)	31% +	21% +	*52%* +
Japan (n=502)	18%	10%	*28%*	Japan (n=104)	25%	17%	*41%* +
Australia (n=501)	16%	11%	*27%*	Australia (n=121)	20%	17%	*37%* +
Thailand (n=501)	18%	9%	*27%*	Thailand (n=110)	24%	13%	*36%* +
Iceland (n=501)	16%	7%	*23%*	Iceland (n=108)	17%	16%	*33%* +
Mexico (n=503)	14%	7%	*21%*	Mexico (n=106)	16%	12%	*28%*
India (n=501)	11%	5%	*16%*	India (n=88)	21% +	10% +	*31%* +
United Arab Emirates (n=501)	9%	7%	*15%*	United Arab Emirates (n=130)	8%	9%	*17%*
China (n=501)	8%	6%	*14%*	China (n=99)	14% +	9%	*23%* +

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)

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

Destination Fit

| Total France | | HVG Audience | |

Legend: ■ 8 ■ 9 ■ 10 - Exactly what I'm looking for *Top 3 box*

Total France	8	9	10	Top 3 box	HVG Audience	8	9	10	Top 3 box
Canada (n=1504)	18%	10%	21%	**50%**	Canada (n=331)	22% ⊕	11%	27% ⊕	**60%** ⊕
United States (n=501)	15%	10%	17%	**42%**	United States (n=127)	16%	13%	23% ⊕	**53%** ⊕
Japan (n=502)	12%	8%	18%	**38%**	Japan (n=104)	14%	10%	21%	**45%**
Australia (n=501)	14%	10%	13%	**37%**	Australia (n=121)	17%	14%	19% ⊕	**50%** ⊕
Thailand (n=501)	14%	10%	13%	**36%**	Thailand (n=110)	12%	12%	16%	**39%**
Iceland (n=501)	14%	8%	12%	**34%**	Iceland (n=108)	13%	9%	17%	**39%**
Mexico (n=503)	10%	8%	9%	**27%**	Mexico (n=106)	10%	11%	13%	**35%** ⊕
India (n=501)	6%	7%	6%	**19%**	India (n=88)	7%	7%	9%	**23%**
China (n=501)	9%	4%	5%	**18%**	China (n=99)	12%	10%	4%	**26%** ⊕
United Arab Emirates (n=501)	7%		6%	**16%**	United Arab Emirates (n=130)	9%	4%	6%	**19%**

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.

France GTRP – December 2023

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

Destination Appeal

	Total France		HVG Audience

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

Total France	8	9	10 - Agree completely	Top 3 box	HVG Audience	8	9	10 - Agree completely	Top 3 box
Canada (n=1504)	16%	11%	27%	**54%**	Canada (n=331)	18%	16% +	28%	**62%** +
United States (n=501)	17%	8%	23%	**49%**	United States (n=127)	18%	12%	28%	**58%** +
Japan (n=502)	12%	8%	25%	**45%**	Japan (n=104)	12%	10%	27%	**50%**
Australia (n=501)	14%	10%	18%	**42%**	Australia (n=121)	17%	10%	27% +	**54%** +
Thailand (n=501)	13%	11%	17%	**40%**	Thailand (n=110)	11%	17% +	17%	**45%**
Iceland (n=501)	12%	9%	19%	**39%**	Iceland (n=108)	10%	9%	22%	**41%**
Mexico (n=503)	10%	8%	13%	**31%**	Mexico (n=106)	9%	9%	18%	**36%**
India (n=501)	8%	6%	9%	**22%**	India (n=88)	9%	9%	11%	**29%**
China (n=501)	9%	4%	6%	**20%**	China (n=99)	16% +	7%	8%	**31%** +
United Arab Emirates (n=501)	6%	3%	7%	**16%**	United Arab Emirates (n=130)	8%	5%	6%	**20%**

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"*

France GTRP – December 2023

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

Net Promoter Score (NPS)

DESTINATION CANADA

| **Total France** | | **HVG Audience** |

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

	Detractors	Passives	Promoters	NPS		Detractors	Passives	Promoters	NPS
Canada (n=461)	12%	31%	57%	+44%	Canada (n=157)	11%	29%	61%	+50%
Japan (n=212)	15%	29%	56%	+41%	Japan (n=88)	9% ⊖	32%	59%	+50%
Australia (n=199)	16%	28%	56%	+40%	Australia (n=72)	7% ⊖	33%	61%	+54% ⊕
Iceland (n=184)	23%	27%	50%	+26%	Iceland (n=66)	16%	15% ⊖	69% ⊕	+54% ⊕
United States (n=713)	24%	32%	44%	+20%	United States (n=221)	21%	32%	47%	+26%
Thailand (n=424)	25%	31%	44%	+19%	Thailand (n=155)	20%	32%	48%	+27% ⊕
Mexico (n=324)	28%	31%	41%	+13%	Mexico (n=128)	25%	31%	44%	+18%
India (n=230)	37%	27%	36%	-1%	India (n=81)	33%	26%	41%	+8% ⊕
China (n=235)	37%	30%	33%	-5%	China (n=85)	35%	30%	35%	+1%
United Arab Emirates (n=249)	38%	29%	33%	-6%	United Arab Emirates (n=79)	31%	21% ⊖	48% ⊕	+17% ⊕

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?

France GTRP – December 2023

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

Impressions of Canada as a Holiday Destination

■ Total France **■ HVG Audience**

Statement	Total France	HVG Audience
Has beautiful outdoor scenery and landscapes	73%	78% ⊕
Is a place to form lifelong memories	63%	65%
Is a great place to see wildlife in its natural habitat	62%	65%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	61%	65% ⊕
Has great outdoor activities I would participate in	60%	62%
Is a place I want to visit with my family	60%	62%
Is a place I would be proud to tell people I have visited	59%	65% ⊕
Is a place where I can explore several different cities or regions in one trip	59%	65% ⊕
Is a great place for holidays that avoid surprises	58%	65% ⊕
Is a place where I can get away from the stresses of everyday life	56%	57%
Is a place where I can experience things that I can't experience at home	55%	57%
Its cities have a great atmosphere	53%	57%
Has transport options that make it easy for me to get to from where I live	52%	61% ⊕
Is a place I want to visit with friends	50%	52%

Statement	Total France	HVG Audience
Its cities have a lot of great attractions to see and do	50%	56% ⊕
Offers activities that are physically challenging	47%	51%
Is an environmentally-friendly travel destination	46%	47%
Is a socially responsible travel destination	45%	47%
Is a great place for shopping and browsing through stores	39%	41%
Has a culture that I would want to experience	38%	39%
Has appealing festivals and events	38%	40%
Has great historical or heritage sites and experiences	38%	42%
Has a great arts and music scene	33%	38% ⊕
Is a place trending as a must-visit spot	32%	33%
Has great dining and food experiences	31%	29%
Offers good value for money	30%	32%

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=1504); HVG (n=331)
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.

France GTRP – December 2023

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

DESTINATION CANADA

	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	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		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	Weakness	Strength	Weakness	Strength		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.

France GTRP – December 2023

DESTINATION CANADA

	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		Strength			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						
Has great dining and food experiences	Weakness		Strength	Weakness	Strength	Strength	Strength	Strength		Weakness
Has a great arts and music scene								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		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.

France GTRP – December 2023

Brand Value Statements for Canada

Legend: Total France (dark teal), HVG Audience (blue)

Statement	Total France	HVG Audience
Is a place with wide-open landscapes	72%	76%
Is a place where nature can be enjoyed in close proximity to cities	70%	75%
Is a place where the people are welcoming	67%	71%
Is a place where the people are open-minded	66%	69%
Is a good place to live	65%	70% +
Is a place where the people embrace new ideas	60%	65% +
Is a place that embraces cultural diversity	55%	60% +
Has a distinctive identity that can't be replicated by other destinations	42%	42%

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=1504); HVG (n=331)
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.

France GTRP – December 2023

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

	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.

France GTRP – December 2023

DESTINATION CANADA

	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

Legend: 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.

France GTRP – December 2023

Destination Attributes: Drivers Analysis: Among Total France

DESTINATION CANADA

☐ = Brand Value Statement

Attribute	Value
Is a place I want to visit with my family	6.79%
Is a place I would be proud to tell people I have visited	6.61%
Is a place I want to visit with friends	5.25%
Is a socially responsible travel destination	4.32%
Is a great place for holidays that avoid surprises	4.09%
Is an environmentally-friendly travel destination	3.28%
Is a good place to live	3.20%
Has a culture that I would want to experience	3.18%
Offers good value for money	3.08%
Is a place trending as a must-visit spot	3.07%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo…	2.89%
Is a place to form lifelong memories	2.87%
Its cities have a great atmosphere	2.87%
Has great dining and food experiences	2.86%
Is a place where the people are open-minded	2.83%
Is a place where nature can be enjoyed in close proximity to cities	2.77%
Is a place where I can explore several different cities or regions in one trip	2.71%
Has great outdoor activities I would participate in	2.64%
Is a place with wide-open landscapes	2.54%
Is a place where the people embrace new ideas	2.51%
Has a distinctive identity that can't be replicated by other destinations	2.39%
Has a great arts and music scene	2.36%
Is a great place to see wildlife in its natural habitat	2.34%
Is a great place for shopping and browsing through stores	2.31%
Has appealing festivals and events	2.30%
Is a place where I can get away from the stresses of everyday life	2.29%
Is a place where the people are welcoming	2.27%
Is a place where I can experience things that I can't experience at home	2.27%
Has beautiful outdoor scenery and landscapes	2.20%
Has transport options that make it easy for me to get to from where I live	1.99%
Its cities have a lot of great attractions to see and do	1.96%
Has great historical or heritage sites and experiences	1.85%
Is a place that embraces cultural diversity	1.58%
Offers activities that are physically challenging	1.52%

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.

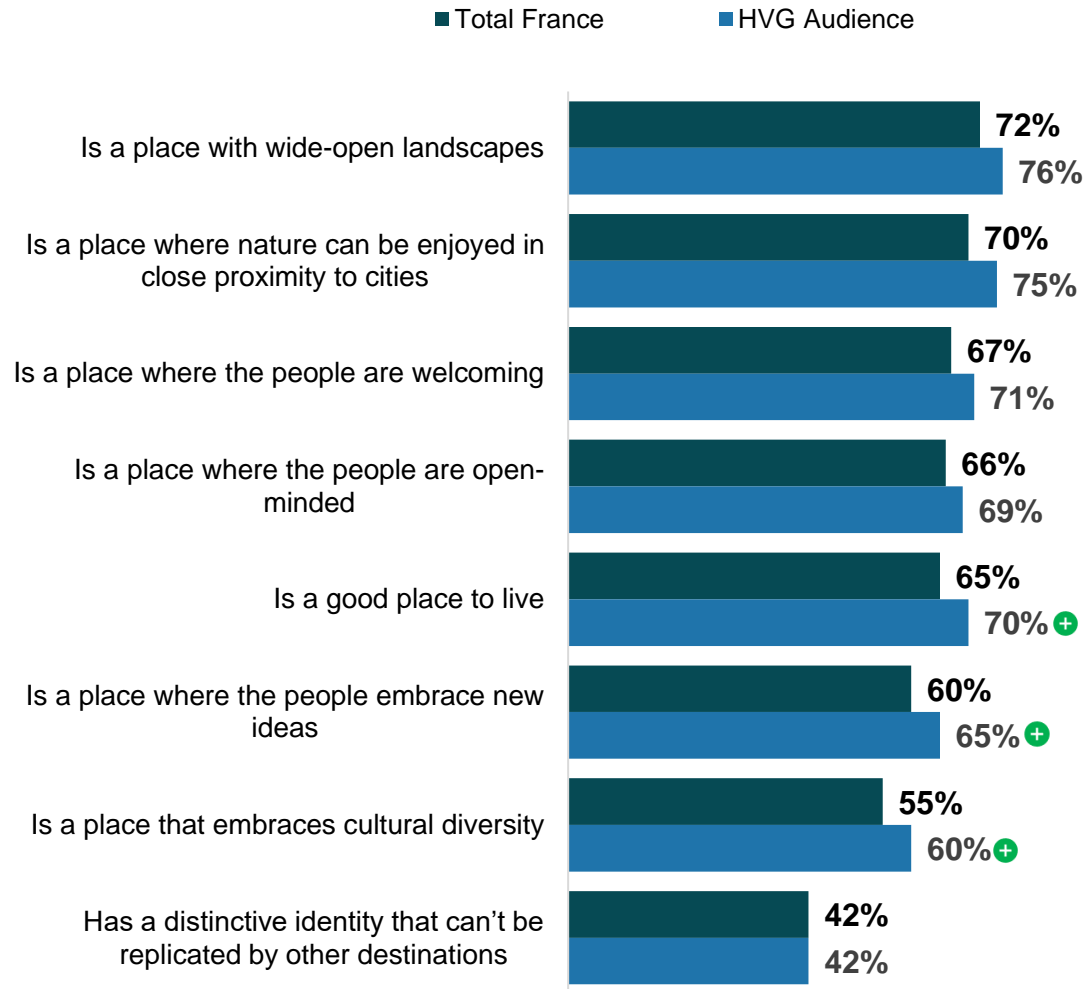# Destination Attributes: Drivers Analysis: Among HVG Audience

☐ = Brand Value Statement

Attribute	Value
Is a place I want to visit with my family	**9.12%**
Is a place I want to visit with friends	**7.53%**
Is a place I would be proud to tell people I have visited	**7.34%**
Has a culture that I would want to experience	**4.84%**
Is a great place for holidays that avoid surprises	**4.18%**
Its cities have a great atmosphere	**4.04%**
Is a good place to live	**3.47%**
Is a place where I can explore several different cities…	**3.40%**
Is a place trending as a must-visit spot	**3.27%**
Its cities have a lot of great attractions to see and do	**3.06%**
Has great outdoor activities I would participate in	**3.03%**
Has great historical or heritage sites and experiences	**2.96%**
Is a socially responsible travel destination	**2.88%**
Is a place where the people embrace new ideas	**2.83%**
Is an environmentally-friendly travel destination	**2.62%**
Has a great arts and music scene	**2.58%**
Is a place where I can get away from the stresses of…	**2.45%**
Is a place I feel safe visiting (e.g. low crime, safe to…	**2.35%**
Has great dining and food experiences	**2.19%**
Has appealing festivals and events	**2.16%**
Offers good value for money	**2.14%**
Has a distinctive identity that can't be replicated by…	**2.14%**
Is a place where the people are open-minded	**2.04%**
Is a place where nature can be enjoyed in close…	**1.95%**
Is a great place for shopping and browsing through…	**1.93%**
Is a place where I can experience things that I can't…	**1.89%**
Has transport options that make it easy for me to get…	**1.69%**
Is a place to form lifelong memories	**1.61%**
Is a place where the people are welcoming	**1.58%**
Offers activities that are physically challenging	**1.47%**
Is a great place to see wildlife in its natural habitat	**1.40%**
Has beautiful outdoor scenery and landscapes	**1.36%**
Is a place with wide-open landscapes	**1.25%**
Is a place that embraces cultural diversity	**1.24%**

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.

Travel Intentions to Canada

Toronto
Ontario

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

DESTINATION CANADA

1-3 Night Short Trip

% Top 2 box

12%	17% ➕

	Total France	HVG Audience
Definitely	4%	5% ➕
Very likely	8%	11% ➕
Somewhat likely	9%	7%
Not interested	80%	77%

4+ Nights Long Trip

% Top 2 box

33%	47% ➕

	Total France	HVG Audience
Definitely	14%	22% ➕
Very likely	19%	25% ➕
Somewhat likely	22%	20%
Not interested	45%	33% ➖

Legend:
- Definitely
- Very likely
- Somewhat likely
- Not interested
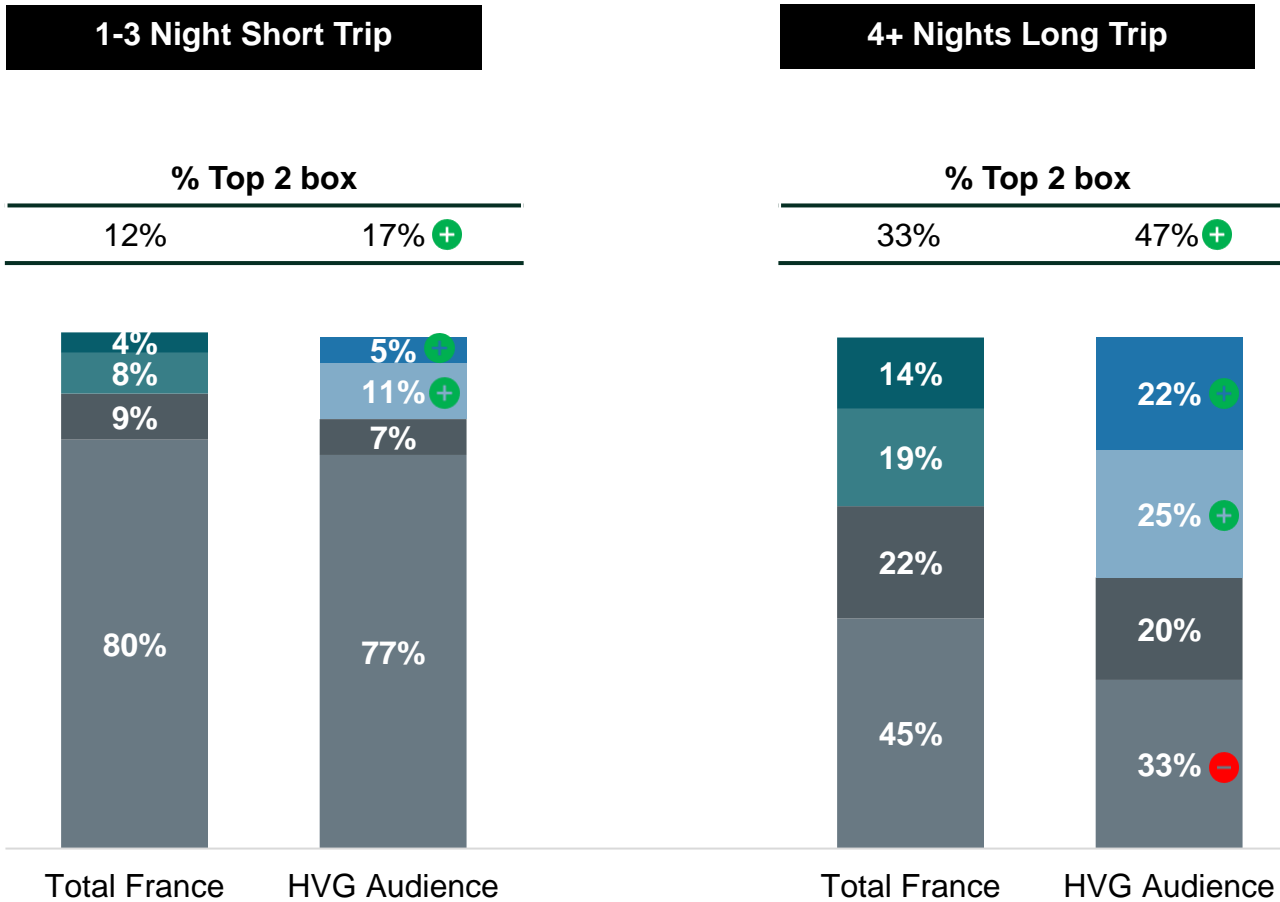
NET: Definitely/ Very Likely to visit Canada in the next 2 years

Total: 35%
HVG: 50% ➕

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=1504); HVG (n=331)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

France GTRP – December 2023

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

Canadian Destinations Likely to Visit

DESTINATION CANADA

	Total France
	HVG Audience

Nunavut
5%	6%	
3%	4%	Iqaluit
2%	3%	Other – NU

Northwest Territories
10%	12%	
6%	8%	Yellowknife
4%	5%	Inuvik
4%	5%	Other – NWT

Yukon
8%	9%	
4%	5%	Whitehorse
4%	6%➕	Dawson City
3%	5%➕	Other – YT

British Columbia
34%	41%➕	
19%	25%➕	Rocky Mountains
26%	31%	Vancouver
13%	16%	Victoria
4%	8%➕	Whistler
4%	7%➕	Okanagan
4%	7%➕	Other – BC

Alberta
23%	28%	
14%	19%➕	Rocky Mountains
10%	14%➕	Calgary
6%	9%➕	Edmonton
4%	8%➕	Banff
5%	10%➕	Jasper
3%	4%	Other – AB

Saskatchewan
8%	11%	
4%	5%	Regina
4%	8%➕	Saskatoon
2%	4%➕	Other – SK

Manitoba
9%	12%	
5%	8%➕	Winnipeg
4%	7%➕	Churchill
2%	2%	Other – MB

Ontario
49%	44%	
30%	28%	Ottawa
39%	34%	Niagara Falls
37%	33%	Toronto
4%	5%	Muskoka
7%	6%	Other – ON

Quebec
75%	76%	
65%	63%	Montréal
58%	65%➕	Québec City
19%	20%	Mont Tremblant
24%	29%➕	Other – QC

Newfoundland & Labrador
17%	18%	
10%	12%	St. John's
8%	10%	Other - NL

Prince Edward Island
10%	12%	
7%	9%	Charlottetown
5%	5%	Other - PEI

New Brunswick
6%	6%	
2%	3%	Fredericton
3%	3%	Saint John
2%	3%	Other - NB

Nova Scotia
15%	19%➕	
8%	12%➕	Halifax
8%	12%➕	Cape Breton
5%	6%	Other - NS

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=1113); HVG (n=262)
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)
E4a-m. Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

France GTRP – December 2023

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

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

DESTINATION CANADA

Total France
HVG Audience

Northwest Territories

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

Yukon

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

British Columbia

6%	5%	Winter (Dec, Jan, Feb)
12%	15%	Spring (Mar, Apr, May)
16%	22% ⊕	Summer (Jun, Jul, Aug)
11%	16% ⊕	Fall (Sept, Oct, Nov)

Alberta

4%	5%	Winter (Dec, Jan, Feb)
8%	13% ⊕	Spring (Mar, Apr, May)
9%	13% ⊕	Summer (Jun, Jul, Aug)
8%	9%	Fall (Sept, Oct, Nov)

Saskatchewan

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

Nunavut

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

Manitoba

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

Quebec

12%	9%	Winter (Dec, Jan, Feb)
22%	25%	Spring (Mar, Apr, May)
35%	37%	Summer (Jun, Jul, Aug)
31%	37% ⊕	Fall (Sept, Oct, Nov)

Ontario

6%	2% ⊖	Winter (Dec, Jan, Feb)
16%	18%	Spring (Mar, Apr, May)
22%	21%	Summer (Jun, Jul, Aug)
19%	22%	Fall (Sept, Oct, Nov)

Newfoundland & Labrador

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

Prince Edward Island

1%	- ⊖	Winter (Dec, Jan, Feb)
4%	4%	Spring (Mar, Apr, May)
5%	5%	Summer (Jun, Jul, Aug)
4%	5%	Fall (Sept, Oct, Nov)

New Brunswick

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

Nova Scotia

2%	1%	Winter (Dec, Jan, Feb)
4%	5%	Spring (Mar, Apr, May)
7%	8%	Summer (Jun, Jul, Aug)
6%	10% ⊕	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=1113); HVG (n=262)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

France GTRP – December 2023

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

Barriers for Visiting Canada

Total France **HVG Audience**

Barrier	Total France	HVG Audience
Cost	40%	31% ⊖
Extreme weather conditions	21%	23%
Poor weather	21%	27% ⊕
Poor value for money	14%	13%
Unfavourable conditions for driving during winter	12%	13%
There are other places I would rather visit	12%	9%
There is no reason to visit anytime soon	12%	8% ⊖
Too far / flight too long	12%	9% ⊖
Visa requirements	12%	11%
Health risks	9%	7%
Electronic Travel Authorization (eTA) requirements	8%	8%
Unable to take a holiday during months when I want to visit Canada	8%	8%
Destinations and attractions too far apart	7%	10%
Safety concerns	7%	8%
Delays and hassles at airports and borders	6%	5%
Not enough time to take a holiday	6%	6%
Has no iconic attractions I want to see	5%	4%
Language barrier / don't speak my language	5%	2% ⊖
Too many crowds at the places I want to visit in Canada	5%	8% ⊕
Nothing would prevent me from travelling to Canada	17%	23% ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

France GTRP – December 2023

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

Travel Behaviours

Churchill
Manitoba

Top 10 Activities Interested In & Trip Anchors

DESTINATION CANADA

Top 10 General Activities Interested In	
Total France (n=1504)	**HVG Audience** (n=331)
Nature walks	Nature walks ➕
Local markets (e.g. public markets, farmers market, night markets)	Historical, archaeological or world heritage sites ➕
Oceanside beaches	Local markets (e.g. public markets, farmers market, night markets)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Oceanside beaches
Nature parks	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Historical, archaeological or world heritage sites	Nature parks
Hiking	Learning about Indigenous culture, traditions or history ➕
Learning about Indigenous culture, traditions or history	Hiking
Trying local food and drink	Trying local food and drink
Guided city tours	Guided city tours ➕

Top 10 Trip Anchor Activities	
Total France (n=1504)	**HVG Audience** (n=331)
Nature walks	Nature walks
Oceanside beaches	Historical, archaeological or world heritage sites ➕
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Oceanside beaches
Historical, archaeological or world heritage sites	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Nature parks	Hiking
Hiking	Learning about Indigenous culture, traditions or history ➕
Learning about Indigenous culture, traditions or history	Nature parks
Local markets (e.g. public markets, farmers market, night markets)	Local markets (e.g. public markets, farmers market, night markets)
Northern lights	Travelling to remote destinations ➕
Trying local food and drink	Exploring places most tourists won't go to ➕

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)

France GTRP – December 2023

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

General Activities Interested In

Legend: ■ Total France ■ HVG Audience

Activity	Total France	HVG Audience	Sig.
Nature walks	67%	74%	+
Local markets (e.g. public markets, farmers market, night markets)	63%	66%	
Oceanside beaches	61%	64%	
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	58%	62%	
Nature parks	57%	59%	
Historical, archaeological or world heritage sites	55%	66%	+
Hiking	55%	56%	
Learning about Indigenous culture, traditions or history	52%	58%	+
Trying local food and drink	51%	53%	
Guided city tours	44%	49%	+
City green spaces like parks or gardens	43%	42%	
Northern lights	42%	40%	
Viewing wildlife or marine life	41%	43%	
Exploring places most tourists won't go to	40%	47%	+
Fine dining	40%	44%	
Shopping for items that help me remember my trip	38%	42%	
Lakeside beaches	37%	35%	
Art galleries or museums	36%	38%	
Travelling to remote destinations	36%	45%	+

Activity	Total France	HVG Audience	Sig.
Self-guided driving tours or road trips	35%	41%	+
Autumn colours	35%	38%	
Guided nature tours	33%	35%	
Nightlife	32%	32%	
Amusement or theme parks	30%	30%	
Casual biking	29%	29%	
Guided boat tours	29%	33%	+
Wilderness lodges	28%	25%	
Shopping for clothes and shoes	27%	29%	
Culinary tours or cooking classes	26%	24%	
Spa or wellness centres	26%	25%	
Cultural or traditional festivals	26%	28%	
Spring blossoms	26%	26%	
Breweries or wineries	25%	32%	+
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	25%	28%	
Kayaking, canoeing or paddle boarding	21%	24%	
Music festivals	20%	21%	
Camping	20%	15%	−
Cruises	20%	17%	
Food and drink festivals or events	20%	21%	

Activity	Total France	HVG Audience	Sig.
Road cycling	19%	20%	
Mountain biking	18%	18%	
Guided train tours	18%	20%	
Snowshoeing or cross country skiing	17%	19%	
Downhill skiing or snowboarding	16%	19%	
Renting a recreational vehicle (RV)	16%	23%	+
Guided airplane or helicopter tours	15%	17%	
Sporting events (to attend or participate)	15%	17%	
Agricultural or country farm tours	14%	13%	
Winter festivals	13%	13%	
Fishing or angling	10%	12%	
Movie festivals	10%	10%	
Comedy festivals	9%	10%	
Shopping for luxury items	9%	12%	+
Golfing	6%	8%	
Rodeos	5%	6%	
Hunting	5%	7%	
Heli-skiing	4%	6%	+

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

France GTRP – December 2023

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

Trip Anchor Activities

Total France ■ **HVG Audience**

Activity	Total France	HVG Audience
Nature walks	32%	36%
Oceanside beaches	32%	33%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	30%	32%
Historical, archaeological or world heritage sites	30%	35% ➕
Nature parks	28%	29%
Hiking	28%	31%
Learning about Indigenous culture, traditions or history	26%	30% ➕
Local markets (e.g. public markets, farmers market, night markets)	26%	28%
Northern lights	20%	19%
Trying local food and drink	19%	20%
Exploring places most tourists won't go to	19%	23% ➕
Travelling to remote destinations	18%	26% ➕
Guided city tours	17%	17%
Viewing wildlife or marine life	17%	19%
Art galleries or museums	16%	16%
Fine dining	15%	17%
Guided nature tours	14%	15%
Self-guided driving tours or road trips	14%	16%
Nightlife	14%	13%

Activity	Total France	HVG Audience
City green spaces like parks or gardens	13%	12%
Lakeside beaches	13%	10%
Autumn colours	13%	15%
Shopping for items that help me remember my trip	12%	13%
Amusement or theme parks	11%	12%
Casual biking	11%	12%
Spa or wellness centres	10%	11%
Wilderness lodges	10%	10%
Cruises	10%	8%
Spring blossoms	9%	11%
Culinary tours or cooking classes	9%	9%
Cultural or traditional festivals	9%	10%
Guided boat tours	9%	10%
Shopping for clothes and shoes	9%	8%
Camping	8%	3% ➖
Breweries or wineries	7%	10% ➕
Music festivals	7%	8%
Downhill skiing or snowboarding	7%	9%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	7%	7%
Road cycling	6%	7%

Activity	Total France	HVG Audience
Kayaking, canoeing or paddle boarding	6%	8%
Guided train tours	6%	6%
Mountain biking	6%	6%
Guided airplane or helicopter tours	5%	6%
Food and drink festivals or events	5%	6%
Snowshoeing or cross country skiing	5%	6%
Agricultural or country farm tours	5%	5%
Sporting events (to attend or participate)	5%	6%
Renting a recreational vehicle (RV)	5%	6%
Winter festivals	4%	6%
Movie festivals	4%	4%
Fishing or angling	4%	5%
Comedy festivals	3%	4%
Shopping for luxury items	3%	3%
Golfing	3%	5% ➕
Hunting	2%	2%
Heli-skiing	2%	3% ➕
Rodeos	1%	1%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) Selected an activity (n=1489); HVG (n=331)
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)

France GTRP – December 2023

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

Priority of Sustainable Travel When Planning a Trip

% Score 5 to 7 (out of 7)

	Total France	HVG Audience
	50%	52%

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

Total France:
- 12%
- 13%
- 24%
- 27%
- 9%
- 4%
- 10%

HVG Audience:
- 12%
- 17% ➕
- 23%
- 21% ➖
- 11%
- 5%
- 11%

Sustainable Travel Description

Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

Base: Long-haul 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'.

France GTRP – December 2023

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

Top 3 Most Important Sustainability Efforts

■ Total France   ■ HVG Audience

Effort	Total France	HVG Audience
Conservation of natural areas in my destination	49%	49%
Knowing that the local culture of my destination is not negatively impacted by tourism	37%	40%
Knowing that my money is directly supporting the local community	32%	34%
Dining options that use local and/or organic ingredients	26%	30%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	25%	31%
Efforts to reduce overcrowding in my destination	24%	28%
Knowing that the local community in my destination is open and welcoming to travellers	24%	26%
Eco-friendly accommodations in my destination	20%	21%
Eco-tour activities in my destination	17%	19%
None of the above	3%	1% ⊖

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.

France GTRP – December 2023

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

Barriers to Sustainable Travel

Total France **HVG Audience**

Sustainable travel is more expensive
- Total France: **45%**
- HVG Audience: 42%

There is a lack of information about how to travel sustainably
- Total France: **40%**
- HVG Audience: 40%

Travelling sustainably would limit the types of activities I can do
- Total France: **23%**
- HVG Audience: 25%

Sustainable travel doesn't meet my needs for comfort when travelling
- Total France: **22%**
- HVG Audience: 25%

Travelling sustainably is too time consuming
- Total France: **18%**
- HVG Audience: 17%

Sustainable travel doesn't meet my needs for luxury when travelling
- Total France: **11%**
- HVG Audience: 11%

Other
- Total France: **2%**
- HVG Audience: 3%

None of the above
- Total France: **13%**
- HVG Audience: 15%

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".

49

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.

France GTRP – December 2023

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

Impact of Extreme Weather Events on Travel Plans

% Top 2 box

| 69% | 66% |

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

Total France

- Very concerned: 22%
- Somewhat concerned: 47%
- Not very concerned: 26%
- Not concerned at all: 5%

HVG Audience

- Very concerned: 24%
- Somewhat concerned: 43%
- Not very concerned: 25%
- Not concerned at all: 8%

| % Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events | 17% | 18% |
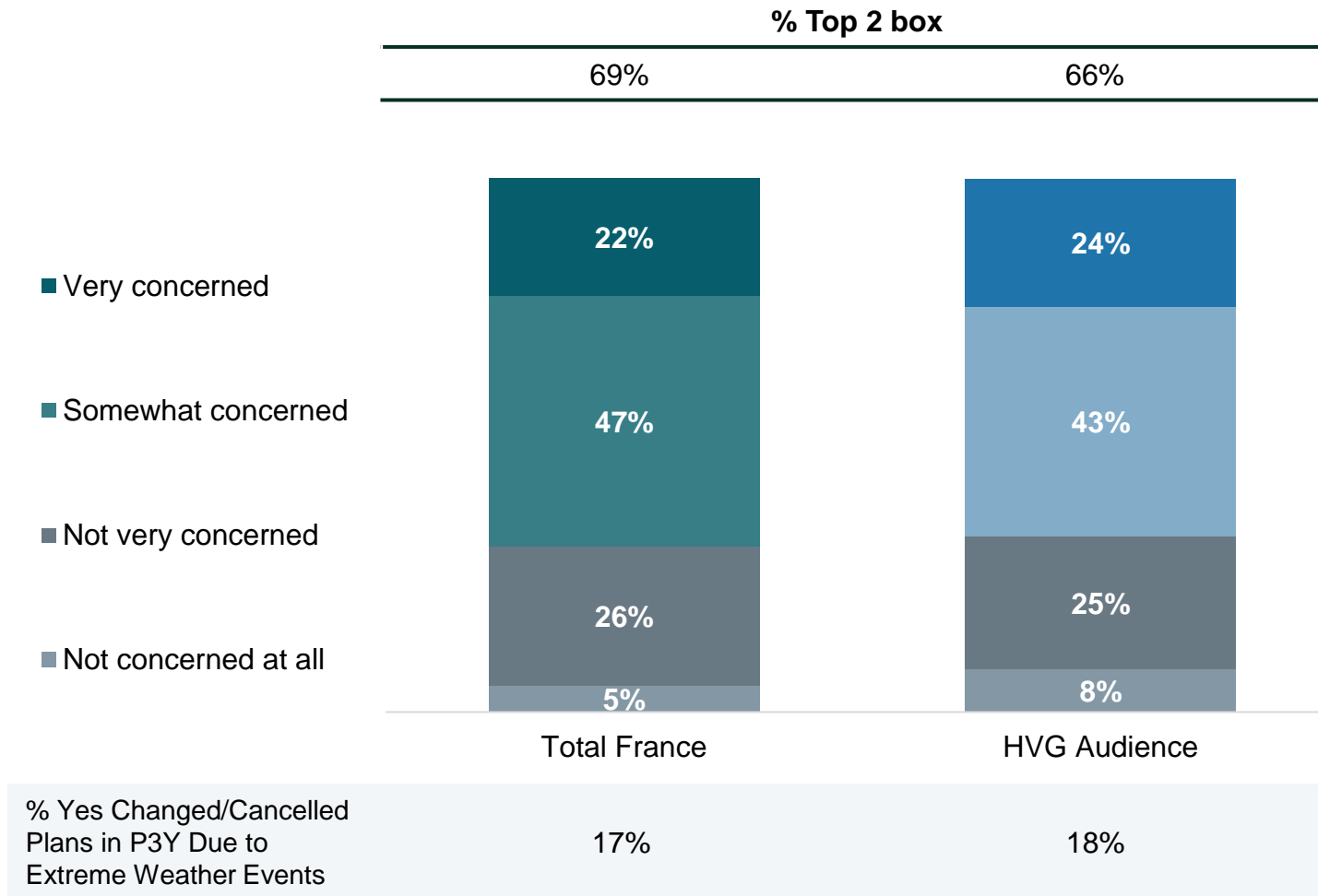
Extreme Weather Events Description

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?

France GTRP – December 2023

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

Impact of International Conflicts & Unrest on Travel Plans

DESTINATION CANADA

% Top 2 box

| 70% | 73% |

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

Total France
- Very concerned: 30%
- Somewhat concerned: 40%
- Not very concerned: 24%
- Not concerned at all: 6%

HVG Audience
- Very concerned: 32%
- Somewhat concerned: 41%
- Not very concerned: 22%
- Not concerned at all: 5%

% 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?

France GTRP – December 2023

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

Usage of AI Tools to Plan Trips

Legend:
- ■ Yes
- ■ No
- ■ Don't know

Total France
- Yes: 15%
- No: 82%
- Don't know: 3%

HVG Audience
- Yes: 17%
- No: 81%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

France GTRP – December 2023

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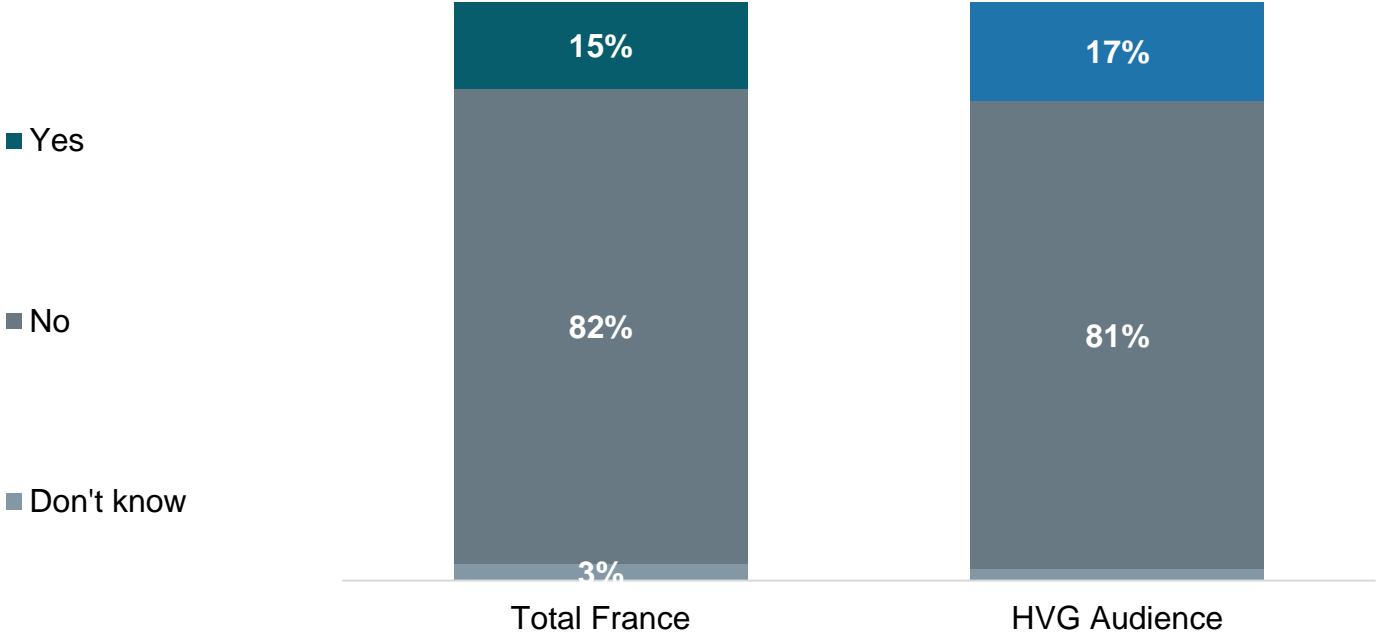
Seasonal Travel

Yellowknife
Northwest Territories

Preferred Time of Year for Holiday Trips
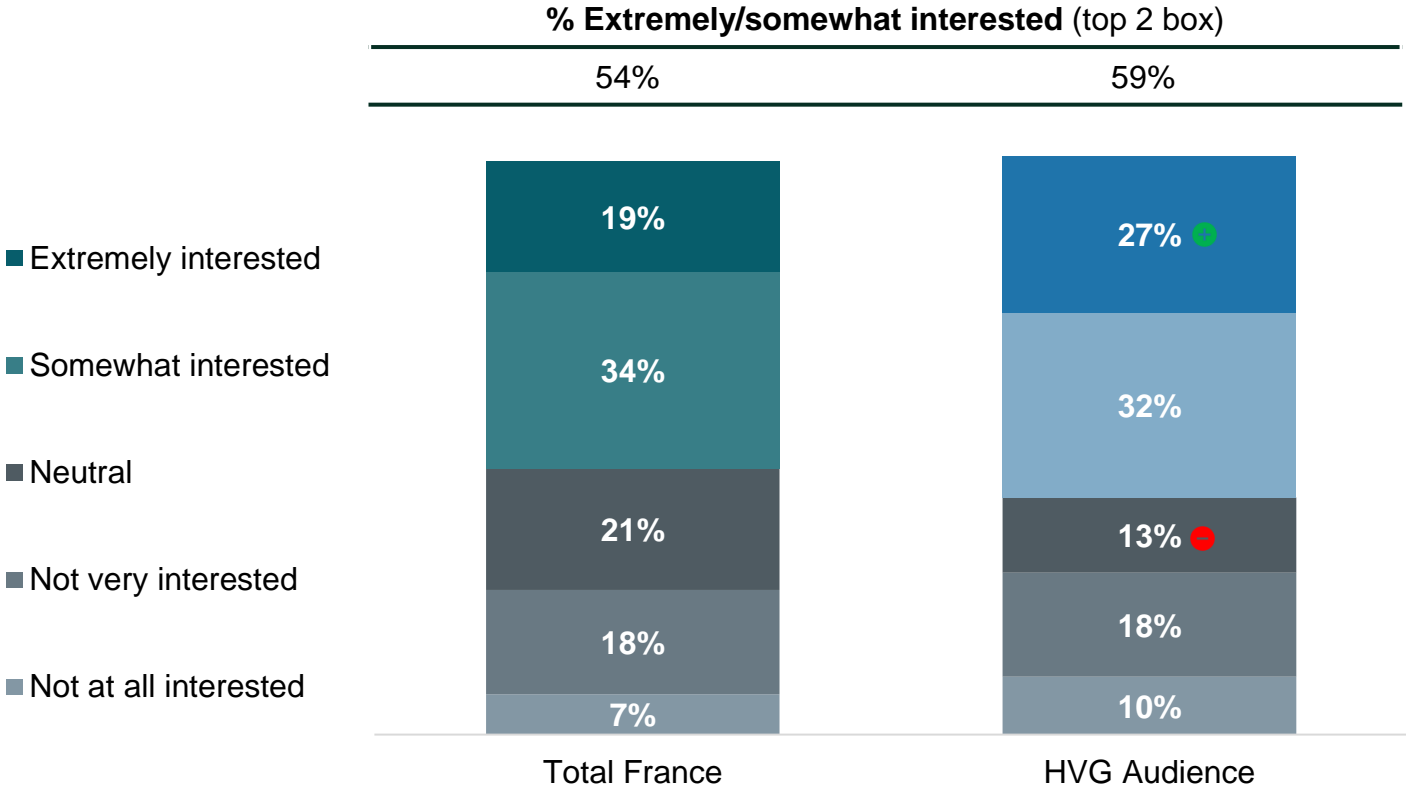
DESTINATION CANADA

Legend: ■ Total France ■ HVG Audience

Month	Total France	HVG Audience
December	18%	22% +
January	14%	18% +
February	17%	24% +
March	16%	25% +
April	26%	32% +
May	32%	36% +
June	33%	35%
July	36%	31% −
August	35%	29% −
September	37%	42% +
October	26%	36% +
November	17%	23% +
Don't know	5%	2% −

	Total France	HVG Audience
Winter	34%	42% +
Spring	51%	61% +
Summer	62%	59%
Fall	52%	65% +

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

France GTRP – December 2023

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

Interest in Winter Holidays

% Extremely/somewhat interested (top 2 box)

| 54% | 59% |

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

Total France: 19%, 34%, 21%, 18%, 7%

HVG Audience: 27% ⊕, 32%, 13% ⊖, 18%, 10%

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 travel (B3/D3)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=758); HVG (n=159)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**?
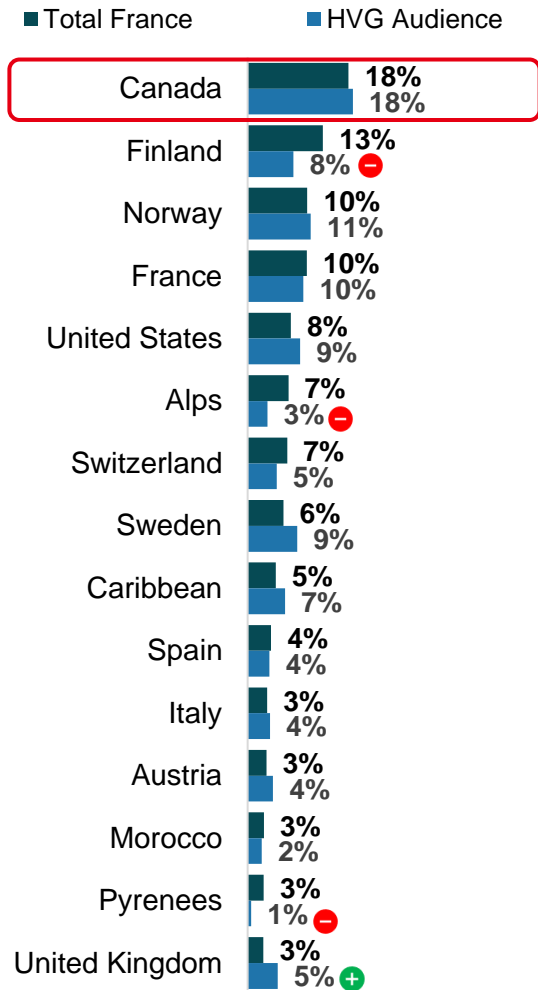
France GTRP – December 2023

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

Unaided Winter Destinations

DESTINATION CANADA

■ Total France   ■ HVG Audience

Destination	Total France	HVG Audience
Canada	**18%**	**18%**
Finland	**13%**	8% ⊖
Norway	**10%**	11%
France	**10%**	10%
United States	**8%**	9%
Alps	**7%**	3% ⊖
Switzerland	**7%**	5%
Sweden	**6%**	9%
Caribbean	**5%**	7%
Spain	**4%**	4%
Italy	**3%**	4%
Austria	**3%**	4%
Morocco	**3%**	2%
Pyrenees	**3%**	1% ⊖
United Kingdom	**3%**	5% ⊕

Winter Season Description

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

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=758); HVG (n=159)
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.

France GTRP – December 2023

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

Motivators & Barriers for Winter Travel to Canada

Motivators for Winter Travel

■ Total France (n=365)　　■ HVG Audience (n=79)

Motivator	Total France	HVG Audience
The weather is ideal at the places I want to visit during these months	32%	34%
There are places in Canada I'd only want to visit during these months	32%	41%
There are specific activities I want to do in Canada that are available in these months	32%	39%
I am able to take a holiday during these months	26%	29%
There are less crowds at the places I want to visit during these months	26%	27%
Travel prices are cheaper during these months	24%	24%
Don't know	7%	5%

Barriers for Winter Travel

■ Total France (n=748)　　■ HVG Audience (n=183)

Barrier	Total France	HVG Audience
The weather is too cold at the places I want to visit during these months	45%	46%
Travel prices are more expensive during these months	16%	10% ⊖
There are other places I'd rather visit during these months	15%	20% ⊕
I am unable to take a holiday during these months	14%	12%
I don't know enough about what activities are available during these months	10%	9%
My kids are in school and I don't want them to miss class	8%	8%
The activities I want to do are not available in these months	7%	6%
There are too many crowds at the places I want to visit during these months	6%	5%
Nothing would prevent me from travelling to Canada during these months	17%	21%

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

% Somewhat/Very interested

■ Total France   ■ HVG Audience

Activity	Total France	HVG Audience
Northern lights	86%	92% ⊕
Learning about Indigenous culture, traditions or history	80%	82%
City sightseeing and experiences (e.g. city tours, markets, snowy streets)	78%	81%
Culinary or dining experiences	73%	73%
Dog sledding	73%	69%
Wilderness lodges	66%	66%
Cultural attractions (e.g. art galleries, museums)	63%	67%
Cross-country skiing or snowshoeing	56%	60%
Spas	55%	60%
Winter festivals and events	54%	56%
Ice skating	42%	40%
Downhill skiing or Snowboarding	38%	38%
Heli-skiing	26%	27%

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)

Interest in Fall Holidays

DESTINATION CANADA

% Extremely/somewhat interested (top 2 box)

72%	83% ➕

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

Total France
- 26%
- 47%
- 21%
- 6%

HVG Audience
- 33% ➕
- 50%
- 12% ➖
- 5%

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=746); HVG (n=172)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**?
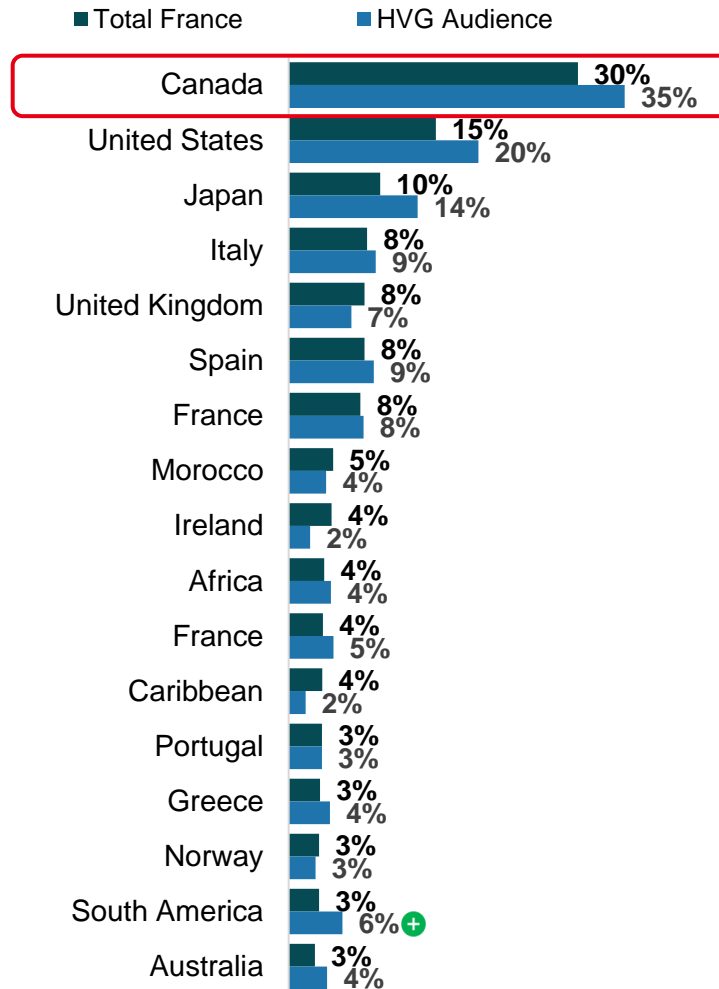
France GTRP – December 2023

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

Unaided Fall Destinations

Total France ■ **HVG Audience**

Destination	Total France	HVG Audience
Canada	30%	35%
United States	15%	20%
Japan	10%	14%
Italy	8%	9%
United Kingdom	8%	7%
Spain	8%	9%
France	8%	8%
Morocco	5%	4%
Ireland	4%	2%
Africa	4%	4%
France	4%	5%
Caribbean	4%	2%
Portugal	3%	3%
Greece	3%	4%
Norway	3%	3%
South America	3%	6% ➕
Australia	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=746); HVG (n=172)
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.
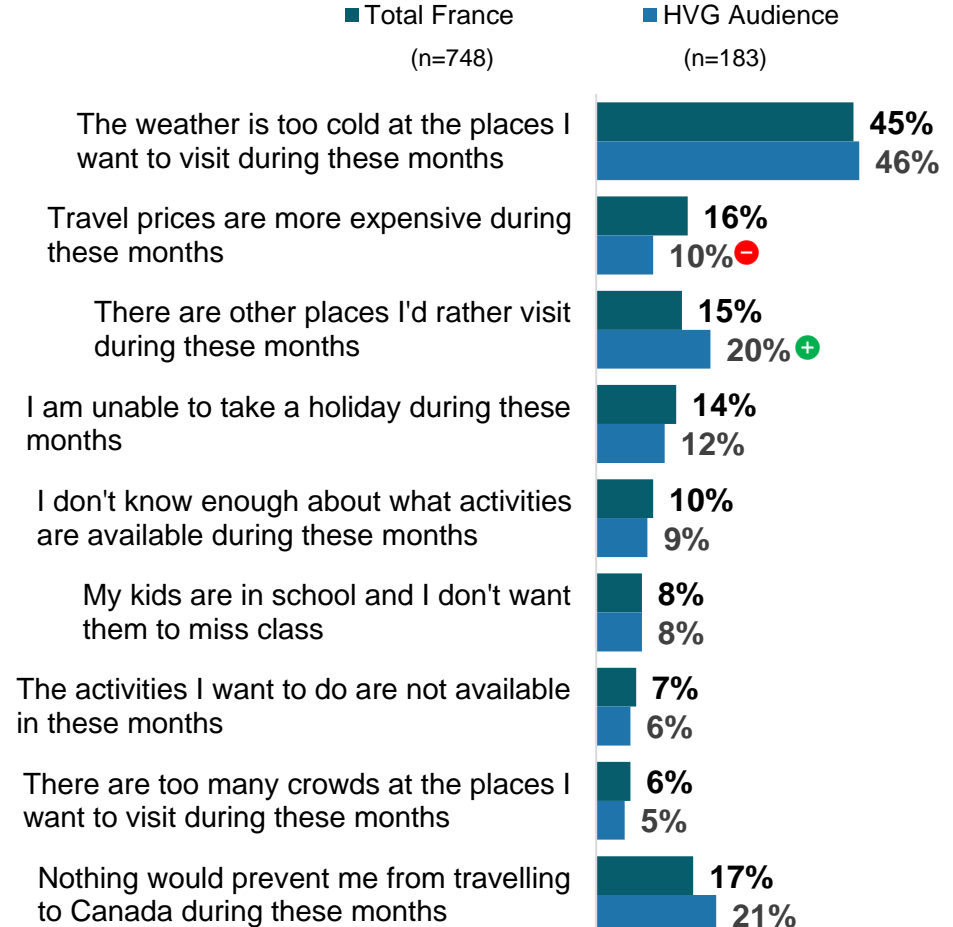
France GTRP – December 2023

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

Motivators & Barriers for Fall Travel to Canada

Motivators for Fall Travel

■ Total France (n=622)　■ HVG Audience (n=168)

Motivator	Total France	HVG Audience
The weather is ideal at the places I want to visit during these months	43%	52% ⊕
There are less crowds at the places I want to visit during these months	37%	37%
Travel prices are cheaper during these months	35%	35%
I am able to take a holiday during these months	29%	29%
There are places in Canada I'd only want to visit during these months	27%	27%
There are specific activities I want to do in Canada that are available in these months	16%	15%
It's school holidays so I can enjoy a family trip	13%	15%
Don't know	7%	5%

Barriers for Fall Travel

■ Total France (n=491)　■ HVG Audience (n=94)

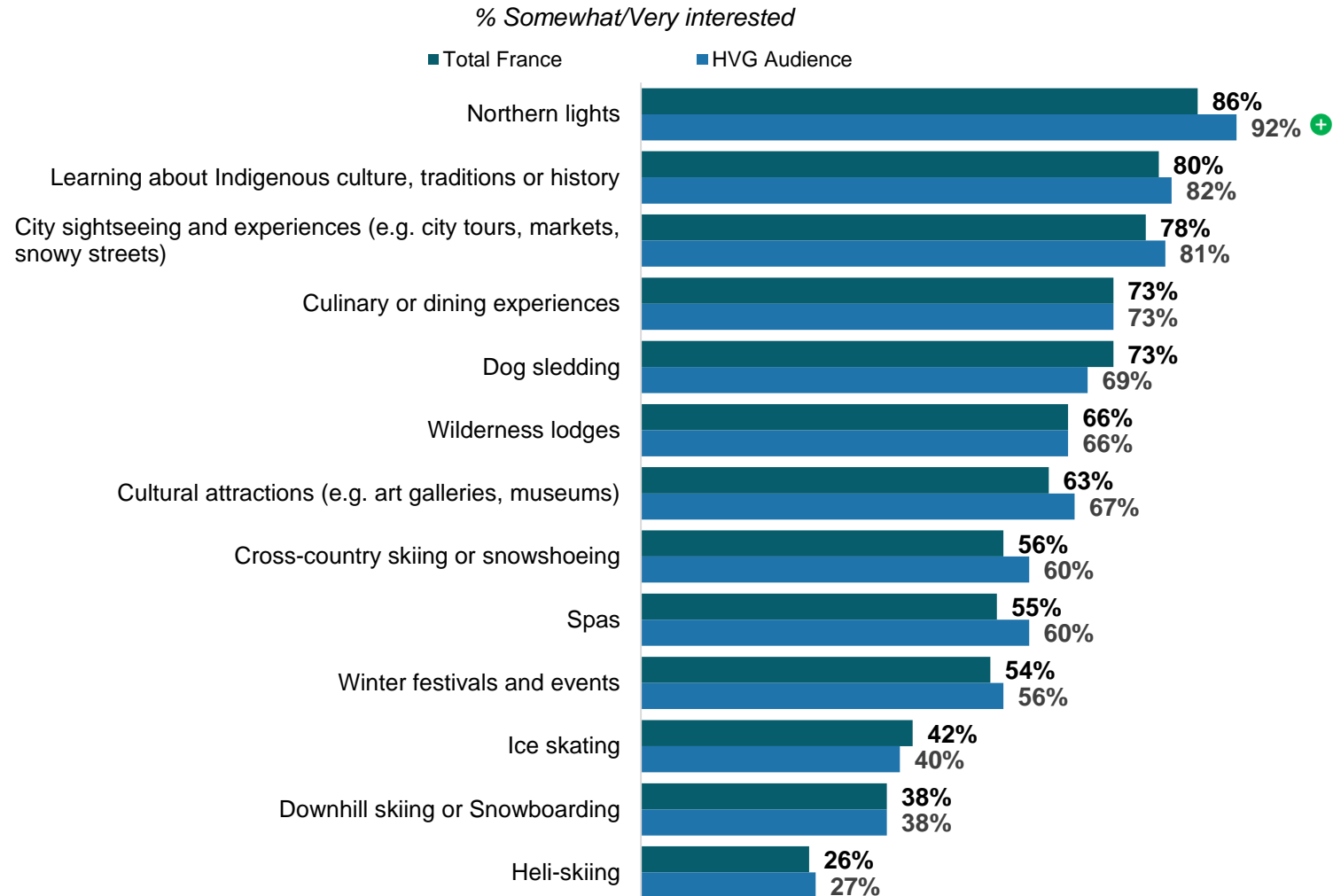| Barrier	Total France	HVG Audience
I am unable to take a holiday during these months	24%	19%
The weather is not ideal at the places I want to visit during these months	18%	13%
I don't know enough about what activities are available during these months	17%	18%
Travel prices are more expensive during these months	14%	12%
My kids are in school and I don't want them to miss class	13%	12%
There are other places I'd rather visit during these months	13%	25% ⊕
There are too many crowds at the places I want to visit during these months	8%	8%
The activities I want to do are not available in these months	6%	6%
Nothing would prevent me from travelling to Canada during these months	21%	30% ⊕

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**?
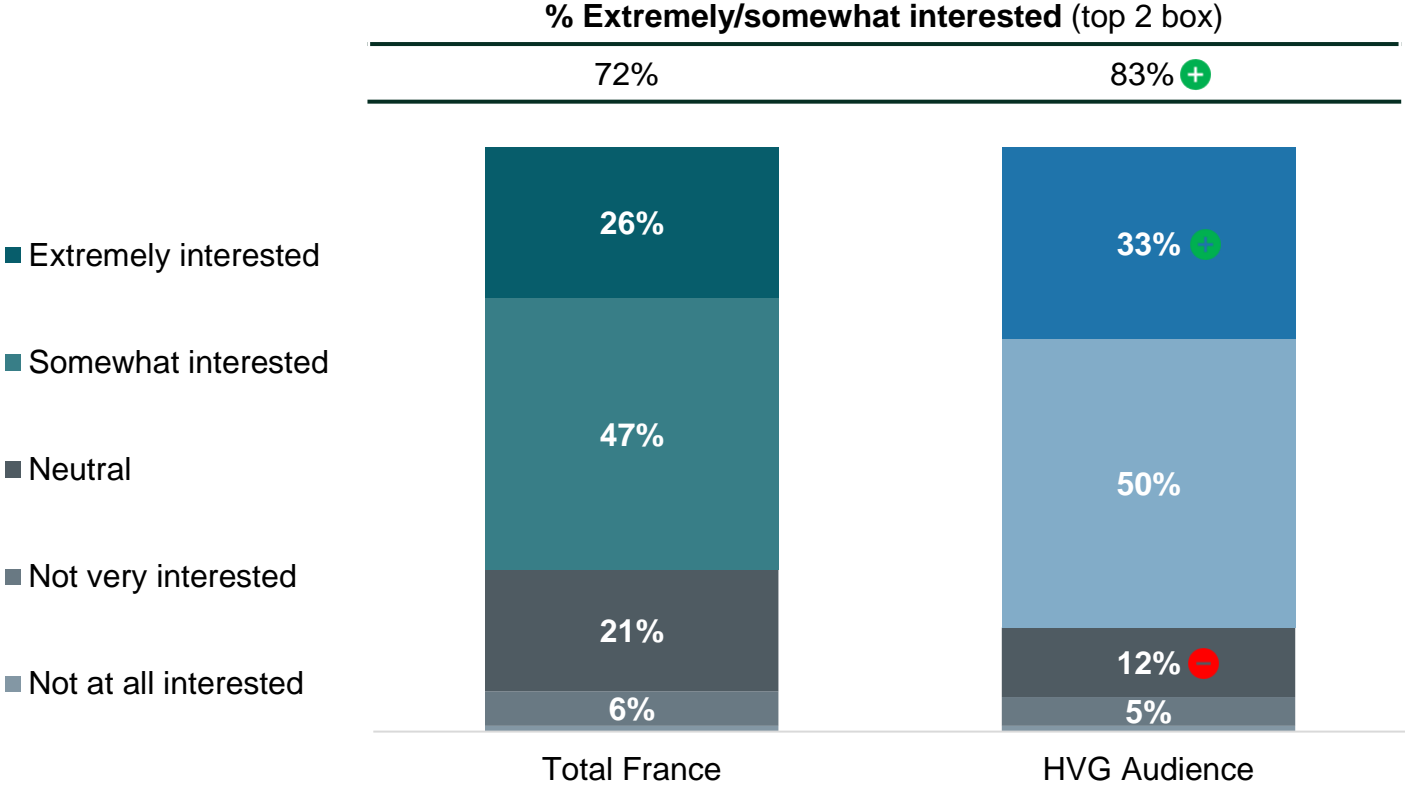
France GTRP – December 2023

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

Interest in Fall Activities in Canada

% Somewhat/Very interested

Total France ■ **HVG Audience** ■

Activity	Total France	HVG Audience
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	88%	92%
Northern lights	86%	90% ➕
Autumn colours	83%	86%
Hiking or walking in nature	83%	88% ➕
Wildlife viewing (e.g. bears, moose, birds)	83%	83%
City sightseeing and experiences (e.g. city tours, markets)	81%	86% ➕
Learning about Indigenous culture, traditions or history	81%	87% ➕
Polar bear viewing	81%	84%
Whale watching	80%	80%
Culinary or dining experiences	77%	77%
Self-guided driving tours or road trips	68%	75% ➕
Wilderness lodges	68%	69%
Cultural attractions (e.g. art galleries, museums)	61%	63%
Train journeys	61%	64%
Spas	55%	57%
Mountain biking	39%	39%
Fishing or angling	32%	37% ➕

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**?

France GTRP – December 2023

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

Indigenous Tourism

British Columbia

Unaided Mentions – Indigenous Cultural & Tourism Activities

■ Total France   ■ HVG Audience

Indigenous People & their culture
- 24%
- 29% ➕

Visiting Villages/Local people
- 16%
- 16%

Learning/ Gaining Knowledge
- 9%
- 7%

Food & Drinks
- 7%
- 7%

Exploring tourist places/attractions
- 7%
- 7%

Eco tourism/Natural environment
- 6%
- 6%

Historical buildings/ churches
- 5%
- 6%

Clothing/ Traditional attire
- 4%
- 3%

Various art and craft work/Aborginal art
- 4%
- 4%

Museums
- 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=1504); HVG (n=331)
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?

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

Unaided Indigenous Tourism Destinations

Legend: ■ Total France   ■ HVG Audience

Destination	Total France	HVG Audience
Australia	13%	19% ⊕
Canada	**9%**	**13% ⊕**
United States	8%	9%
Africa	8%	8%
Brazil	7%	5%
Mexico	4%	3%
Peru	4%	4%
Mongolia	4%	4%
Amazon	3%	2%
New Zealand	3%	5%
India	3%	3%
Morocco	3%	2%
South Africa	3%	4%
France	2%	2%
South America	2%	2%
Japan	2%	3%
Thailand	2%	2%
Indonesia	2%	2%
Kenya	2%	2%
Vietnam	2%	3% ⊕

Indigenous Peoples Description

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); HVG (n=331)
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.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

France GTRP – December 2023

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

Interest in Indigenous Cultural & Tourism Activities

% Somewhat/Very interested

■ Total France   ■ HVG Audience

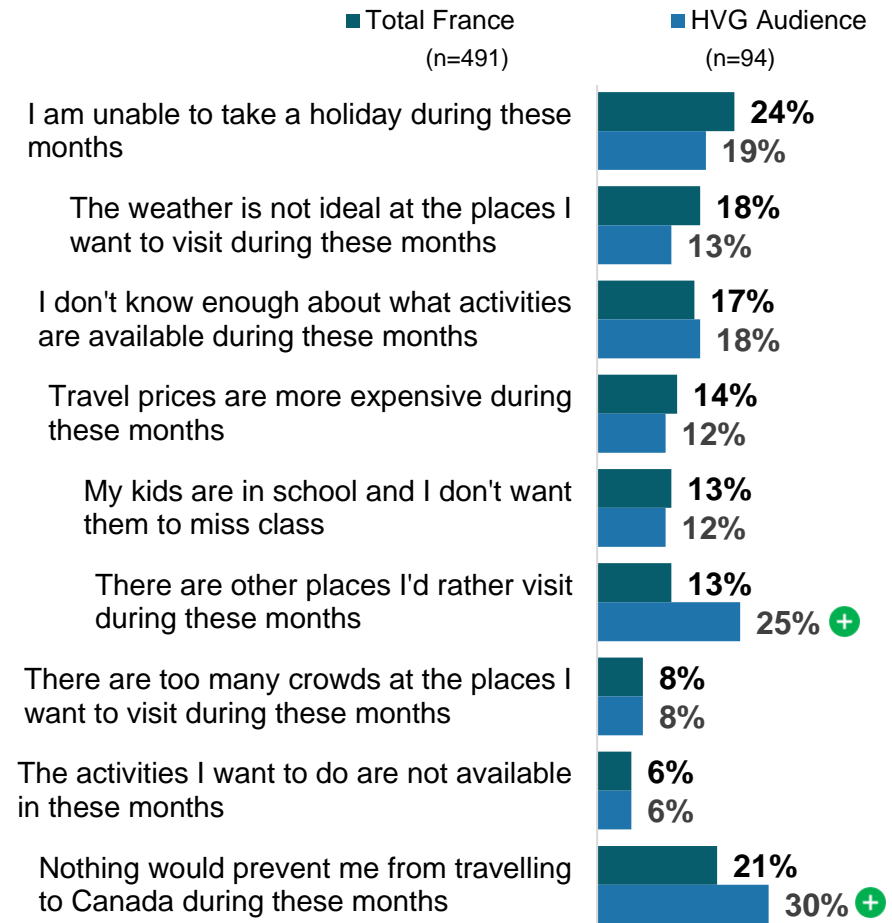| Activity	Total France	HVG Audience
Learning about Indigenous ways of life by visiting an Indigenous community	80%	82%
Indigenous adventure or excursions in nature (kayak, heritage parks, northern lights, etc.)	78%	79%
Experiencing Indigenous food and drink	77%	76%
Learning about Indigenous ways of life through storytelling or connecting with Indigenous Elders	77%	80%
Visiting remote northern Indigenous communities	73%	80% ●
Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)	71%	74%
Visiting a museum, interpretation center or traditional Indigenous site	70%	77% ●
Visiting an Indigenous boutique or art/craft exhibition	69%	74%
Attending an Indigenous Pow Wow, festival, event, or performance	67%	73% ●
Learning about residential schools and reconciliation with Indigenous peoples	64%	71% ●
Hunting and fishing activity with an Indigenous outfitter	43%	46%

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?

France 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=523)
- Total HVG travellers (n=207)

Holidays	66%	69%
Visit family and friends	17%	18%
Combined business / personal reasons	8%	8%
Education	4%	2%
Personal event (e.g., wedding, funeral)	3%	2%
Other	1%	1%

Total Travellers to Any Destination vs. Total Travellers to Canada

- Total travellers (n=523)
- Travellers to Canada (n=139)

Holidays	66%	55% ⊖
Visit family and friends	17%	23%
Combined business / personal reasons	8%	6%
Education	4%	8% ⊕
Personal event (e.g., wedding, funeral)	3%	7% ⊕
Other	1%	1%

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

France 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=348) ■ Total HVG travellers (n=142)

Factor	Total	HVG
It was somewhere I always wanted to visit	41%	46%
It was a safe place to visit	28%	29%
Offered cultural experiences I am interested in	27%	24%
Opportunity to relax, unwind, and decompress	27%	27%
I wanted to visit with my friends or family	26%	30%
Had visited before and wanted to return	23%	29% ➕
It fit my travel budget	23%	21%
Was a place where I could gain a new perspective on my world	21%	22%
Saw a great trip itinerary	20%	22%
Was a great family destination	20%	25%
Offered city experiences I am interested in	18%	19%
Offered outdoor experiences I am interested in	17%	17%
Saw a great deal	17%	17%
My friends or family recommended it	16%	12%
Offered travel activities I am interested in (e.g. cruise, train, or RV trips)	10%	9%
Offered culinary activities I am interested in (e.g. food or winery tour)	9%	11%
Was a place where I could pursue my personal passions	9%	9%
Saw it on a television program or movie	8%	8%
Is a destination that offers socially responsible travel options that support the local community	7%	10%
Offered sports or outdoor activities I wanted to do (e.g. ski, golf)	7%	6%
Was a destination that offered eco-friendly travel activities	6%	7%
Was recommended by a travel agent or tour operator	4%	5%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=348) ■ Travellers to Canada (n=74)

Factor	Total	Canada
It was somewhere I always wanted to visit	41%	36%
It was a safe place to visit	28%	26%
Offered cultural experiences I am interested in	27%	12% ➖
Opportunity to relax, unwind, and decompress	27%	20%
I wanted to visit with my friends or family	26%	31%
Had visited before and wanted to return	23%	24%
It fit my travel budget	23%	17%
Was a place where I could gain a new perspective on my world	21%	15%
Saw a great trip itinerary	20%	20%
Was a great family destination	20%	27%
Offered city experiences I am interested in	18%	12%
Offered outdoor experiences I am interested in	17%	12%
Saw a great deal	17%	21%
My friends or family recommended it	16%	19%
Offered travel activities I am interested in (e.g. cruise, train, or RV trips)	10%	8%
Offered culinary activities I am interested in (e.g. food or winery tour)	9%	12%
Was a place where I could pursue my personal passions	9%	14%
Saw it on a television program or movie	8%	10%
Is a destination that offers socially responsible travel options that support the local community	7%	12%
Offered sports or outdoor activities I wanted to do (e.g. ski, golf)	7%	10%
Was a destination that offered eco-friendly travel activities	6%	5%
Was recommended by a travel agent or tour operator	4%	8%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Took a holiday (n=348); HVG (n=142); Travellers to Canada (n=74)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

France 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=523)
- Total HVG travellers (n=207)

Nights	Total travellers	Total HVG travellers
2-3 nights	9%	8%
4-6 nights	17%	15%
7-13 nights	32%	34%
14+ nights	42%	44%

Total Travellers to Any Destination vs. Total Travellers to Canada

- Total travellers (n=523)
- Travellers to Canada (n=139)

Nights	Total travellers	Travellers to Canada
1 night	0%	1%
2-3 nights	9%	11%
4-6 nights	17%	19%
7-13 nights	32%	29%
14+ nights	42%	40%

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

France 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=523) ■ Total HVG travellers (n=207)

Travel Party	Total travellers	Total HVG travellers
Spouse or partner	50%	63% ⊕
Child (under 18 years old)	19%	21%
Alone/solo	16%	13%
Friend(s)	16%	14%
Child (18 years old or older)	11%	10%
Parent(s)	9%	6% ⊖
Business associates or colleagues	4%	5%
Grandparent(s)	2%	2%
Other family members	13%	12%
Other	1%	0%

Spouse/Partner ONLY
Total: 28%
HVG: 37% ⊕

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=523) ■ Travellers to Canada (n=139)

Travel Party	Total travellers	Travellers to Canada
Spouse or partner	50%	49%
Child (under 18 years old)	19%	22%
Alone/solo	16%	19%
Friend(s)	16%	18%
Child (18 years old or older)	11%	7%
Parent(s)	9%	8%
Business associates or colleagues	4%	5%
Grandparent(s)	2%	3%
Other family members	13%	15%
Other	1%	1%

Spouse/Partner ONLY
Total: 28%
Canada: 24%

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)
F5. With whom did you travel on this trip? (Select all that apply)

France GTRP – December 2023

⊕ / ⊖ = 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=523) ■ Total HVG travellers (n=207)

	Total travellers	HVG travellers
Less than 350€	**2%**	1%
351€ to 750€	**3%**	0% ⊖
751€ to 1,000€	**6%**	3% ⊖
1,001€ to 1,500€	**8%**	4% ⊖
1,501€ to 2,000€	**12%**	9%
2,001€ to 2,750€	**13%**	11%
2,751€ to 3,500€	**13%**	16%
3,501€ to 5,000€	**18%**	23% ⊕
5,001€ to 7,000€	**12%**	16% ⊕
7,001€ to 10,000€	**5%**	7%
10,001€ or more	**7%**	9%

Average Spent
Total: 3,981€
HVG: 4,795€ ⊕

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=523) ■ Travellers to Canada (n=139)

	Total travellers	Travellers to Canada
Less than 350€	**2%**	1%
351€ to 750€	**3%**	4%
751€ to 1,000€	**6%**	7%
1,001€ to 1,500€	**8%**	7%
1,501€ to 2,000€	**12%**	12%
2,001€ to 2,750€	**13%**	15%
2,751€ to 3,500€	**13%**	14%
3,501€ to 5,000€	**18%**	16%
5,001€ to 7,000€	**12%**	14%
7,001€ to 10,000€	**5%**	4%
10,001€ or more	**7%**	5%

Average Spent
Total: 3,981€
Canada: 3,771€

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

Payment Methods for Recent Trip

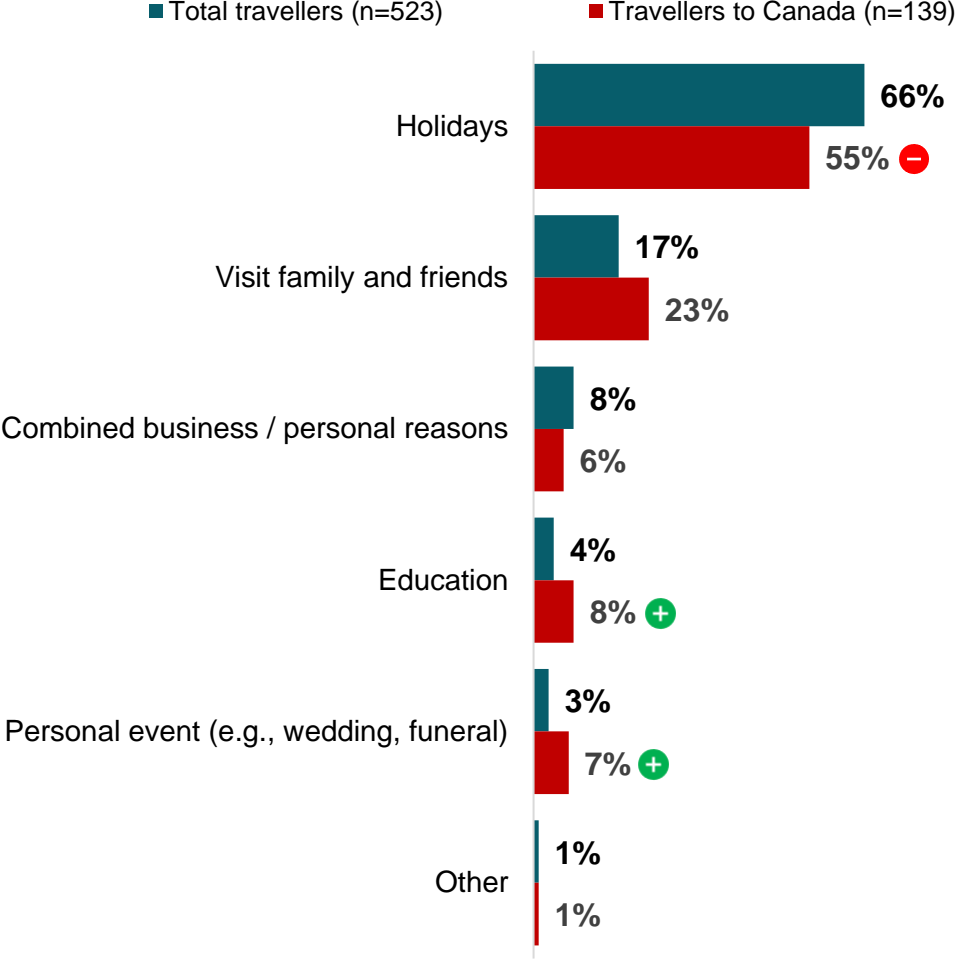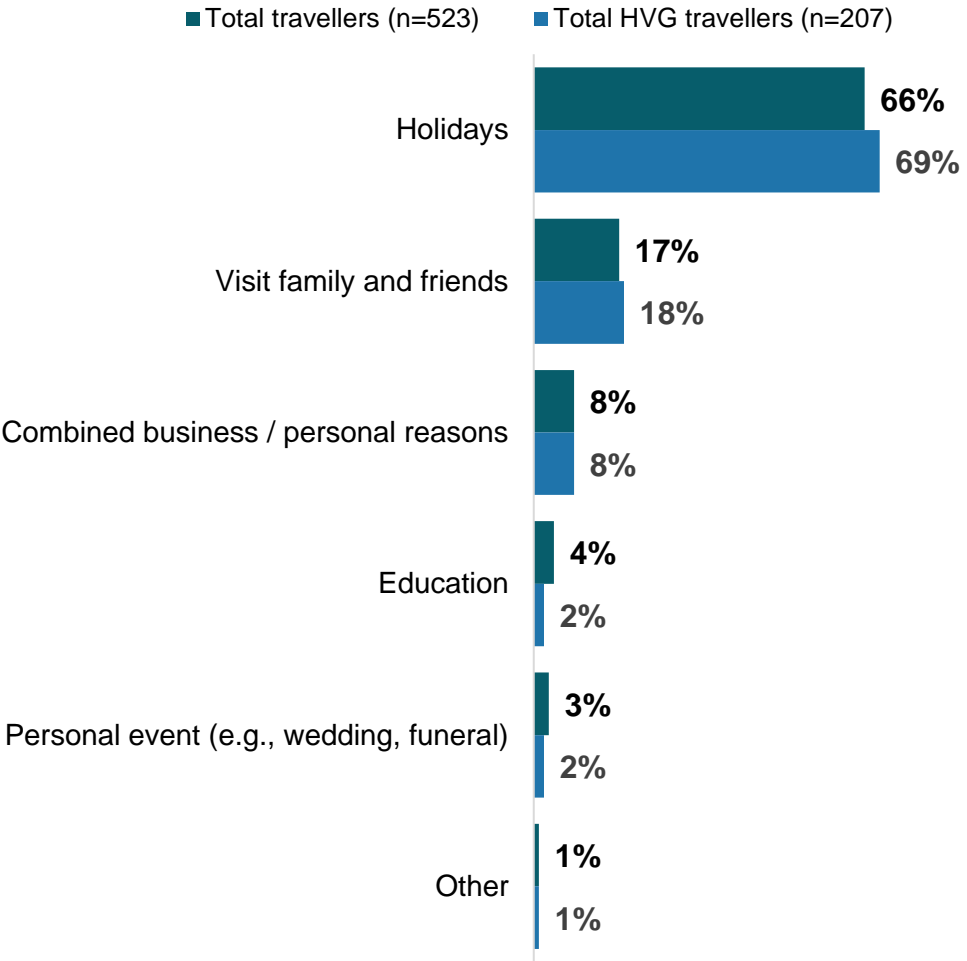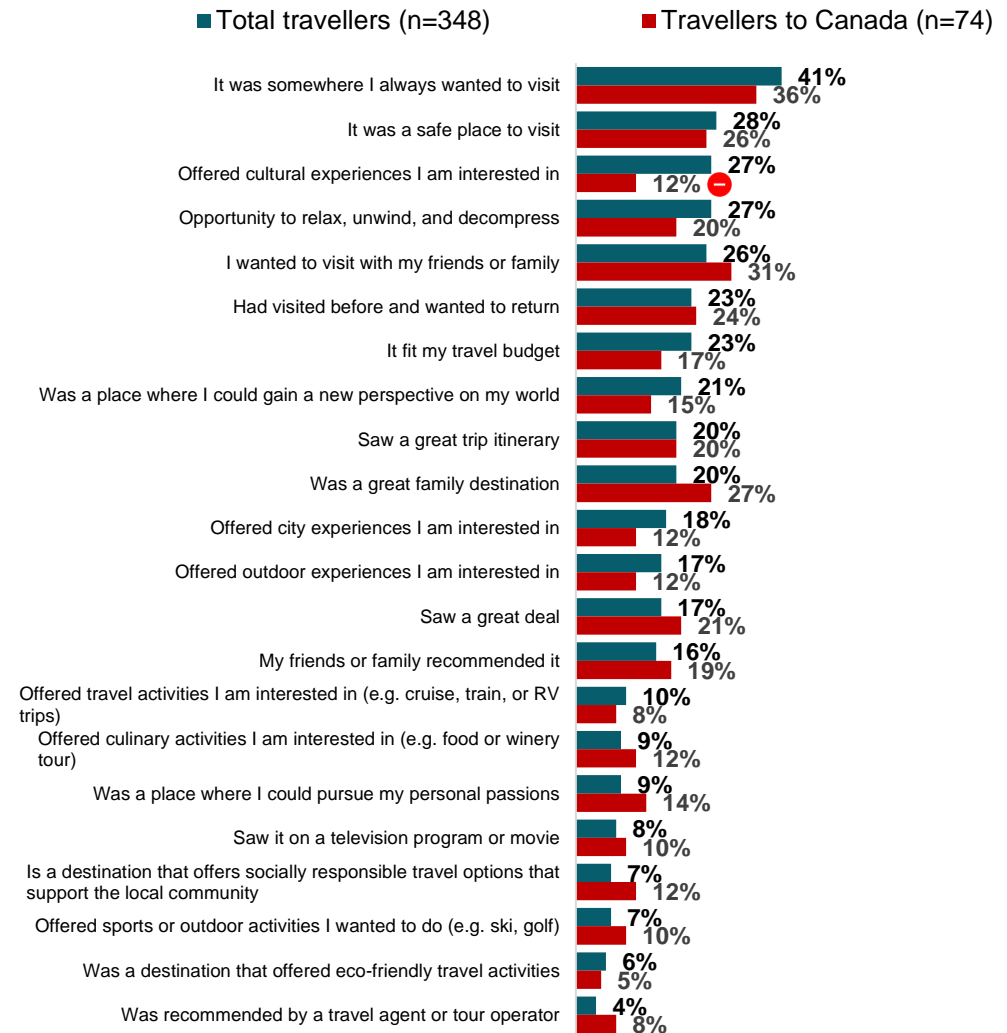**DESTINATION CANADA**

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

Left chart:
- ■ Total travellers (n=523)
- ■ Total HVG travellers (n=207)

Payment Method	Total travellers	Total HVG travellers
Credit card	26%	26%
Debit or bank card	34%	36%
Cash	30%	28%
Mobile Payment	7%	7%
Other	4%	4%

Right chart:
- ■ Total travellers (n=523)
- ■ Travellers to Canada (n=139)

Payment Method	Total travellers	Travellers to Canada
Credit card	26%	27%
Debit or bank card	34%	35%
Cash	30%	22%
Mobile Payment	7%	11%
Other	4%	4%
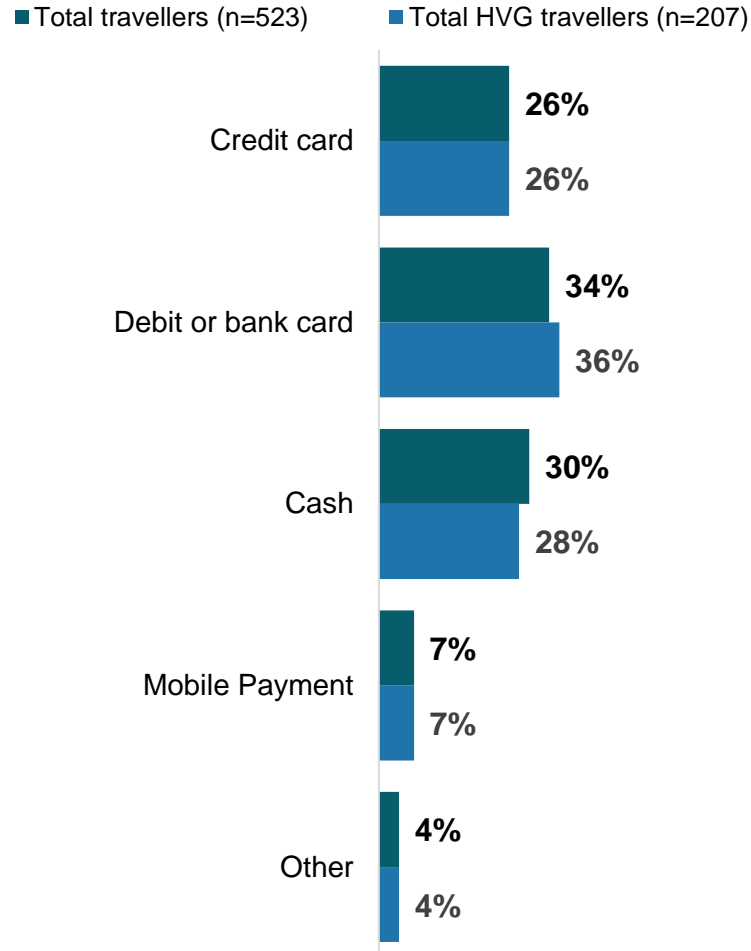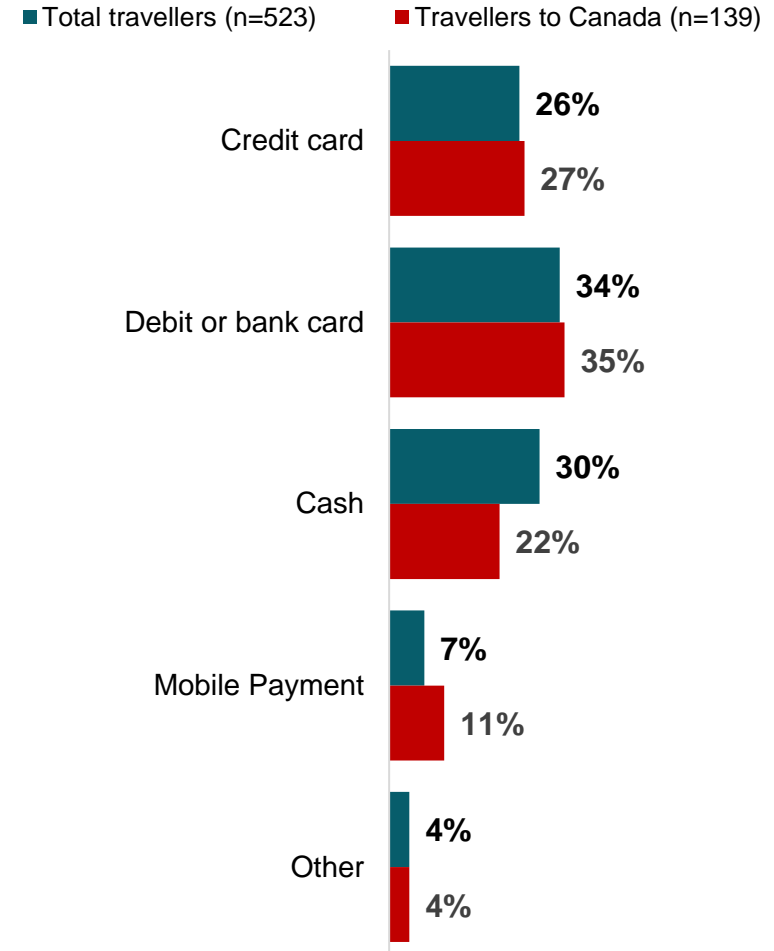
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=523); HVG (n=207); Travellers to Canada (n=139)
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

France GTRP – December 2023

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

Travel Agents/Tour Operator Usage For Recent Trip

DESTINATION CANADA

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

■ Total travellers (n=183)   ■ Total HVG travellers (n=89)

% Used a travel agent
Total: 35%
HVG: 42% ⊕

Activity	Total travellers	HVG travellers
Booking flights	56%	63%
Booking accommodations	53%	60%
Researching flights	42%	43%
Booking ground transportation	37%	42%
Booking activities to see and do	35%	42%
Researching accommodations	32%	36%
Researching activities to see and do	31%	40% ⊕
Researching potential travel destinations	28%	29%
Researching ground transportation	27%	30%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=183)   ■ Travellers to Canada (n=61)

% Used a travel agent
Total: 35%
Canada: 44% ⊕

Activity	Total travellers	Travellers to Canada
Booking flights	56%	56%
Booking accommodations	53%	47%
Researching flights	42%	41%
Booking ground transportation	37%	32%
Booking activities to see and do	35%	29%
Researching accommodations	32%	33%
Researching activities to see and do	31%	35%
Researching potential travel destinations	28%	31%
Researching ground transportation	27%	38% ⊕

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?

France GTRP – December 2023

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

Organized Group Tour Usage For Recent Trip

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

■ Total travellers (n=523)   ■ Total HVG travellers (n=207)

Yes, my whole trip was part of an organized group tour
- 26%
- 31% ⊕

Yes, a portion of my trip was part of an organized group tour
- 9%
- 6%

No
- 66%
- 63%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=523)   ■ Travellers to Canada (n=139)

Yes, my whole trip was part of an organized group tour
- 26%
- 31%

Yes, a portion of my trip was part of an organized group tour
- 9%
- 12%

No
- 66%
- 57% ⊖

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)
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?

France 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=523)   ■ Total HVG travellers (n=207)

Booking method	Total	HVG
Booked directly with the airline(s)	42%	43%
Travel agent/tour operator (NET)	37%	43% ⊕
Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	19%	27% ⊕
Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	19%	19%
Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	10%	12%
Booked online through an online booking engine (e.g. Expedia or Opodo)	29%	29%
Booked by someone else in the travel party	8%	7%
Other	2%	1%
Did not need to book any flights	3%	2%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=523)   ■ Travellers to Canada (n=139)

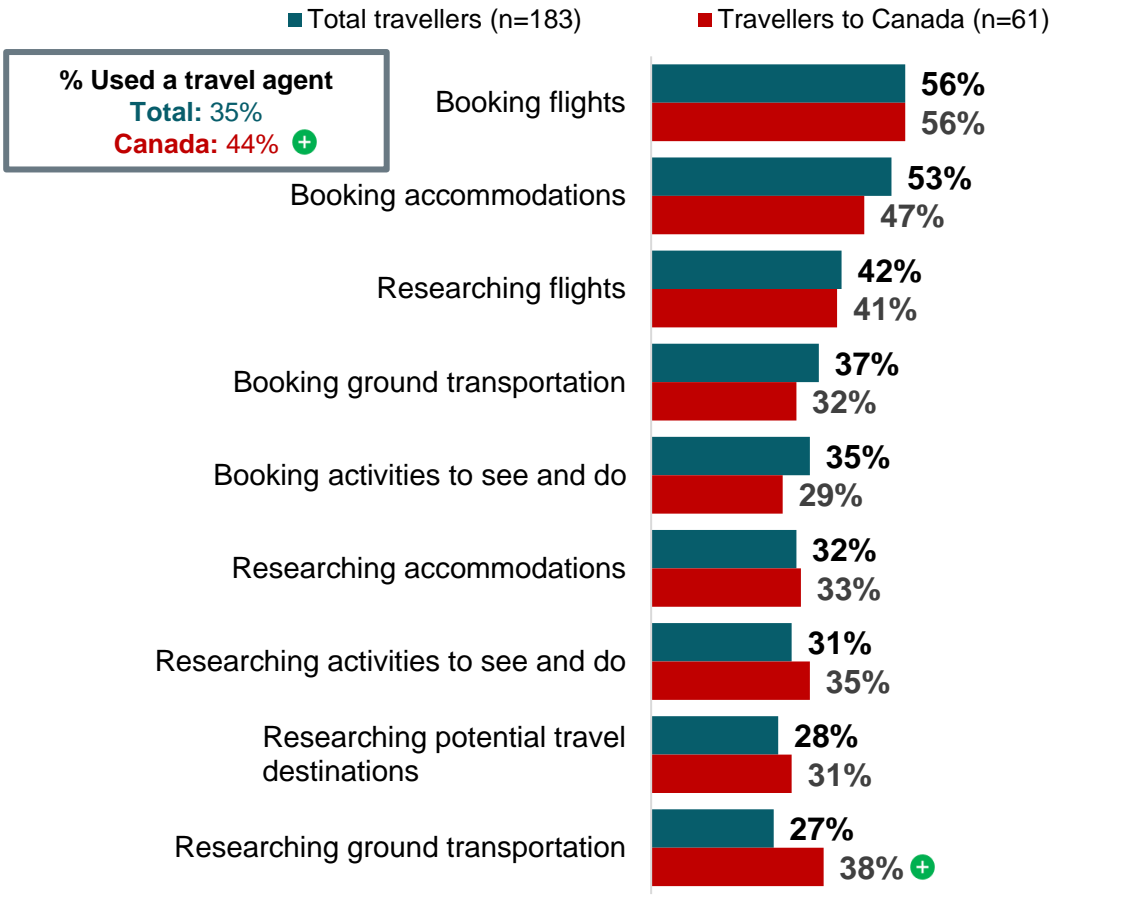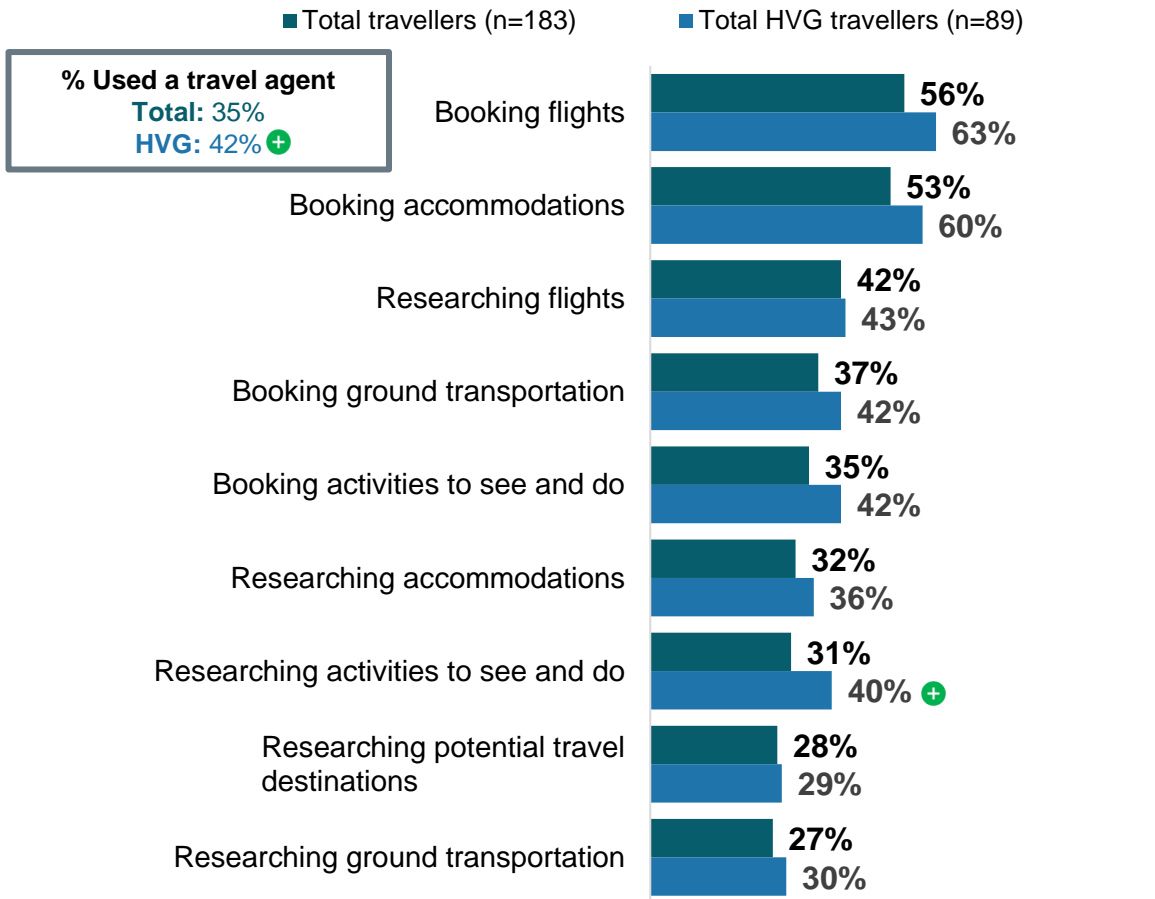| Booking method	Total	Canada
Booked directly with the airline(s)	42%	49% ⊕
Travel agent/tour operator (NET)	37%	41%
Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	19%	23%
Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	19%	18%
Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	10%	16% ⊕
Booked online through an online booking engine (e.g. Expedia or Opodo)	29%	28%
Booked by someone else in the travel party	8%	12% ⊕
Other	2%	1%
Did not need to book any flights	3%	2%

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)

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Booking Accommodations For Recent Trip

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

- Total travellers (n=523)
- Total HVG travellers (n=207)

Category	Total travellers	Total HVG travellers
Travel agent/tour operator (NET)	33%	38% +
Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	14%	18% +
Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	14%	15%
Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	12%	16% +
Booked online through an online booking engine (e.g. Expedia or Opodo)	24%	27%
Booked directly with the lodging/accommodation establishment	22%	22%
Booked through accommodation sharing services website (e.g. Airbnb)	20%	25% +
Booked by someone else in the travel party	7%	5%
Booked through a visitors information centre at the destination	6%	5%
Other	5%	4%
Did not need to book any accommodation	12%	13%

Total Travellers to Any Destination vs. Total Travellers to Canada

- Total travellers (n=523)
- Travellers to Canada (n=139)

Category	Total travellers	Travellers to Canada
Travel agent/tour operator (NET)	33%	39%
Booked in-person with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	14%	18%
Booked online with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	14%	13%
Booked on the phone with a travel agent/tour operator (e.g. Carrefour Voyages or Voyageurs du Monde)	12%	18% +
Booked online through an online booking engine (e.g. Expedia or Opodo)	24%	22%
Booked directly with the lodging/accommodation establishment	22%	20%
Booked through accommodation sharing services website (e.g. Airbnb)	20%	27% +
Booked by someone else in the travel party	7%	8%
Booked through a visitors information centre at the destination	6%	12% +
Other	5%	3%
Did not need to book any accommodation	12%	16%

+ / − = 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=458) ■ Total HVG travellers (n=180)

Accommodation type	Total travellers	HVG travellers
Mid-priced hotel / motel	44%	48%
Rented house, apartment or condominium (e.g., Airbnb)	23%	26%
Luxury hotel	21%	27% ⊕
Budget hotel / motel	16%	14%
Bed & Breakfast (B&B)	13%	10%
Home of friends or relatives	11%	11%
Guest ranch, farm, or lodge	9%	12% ⊕
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	8%	12%
All-inclusive resort	7%	9%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	6%	7%
Camping or trailer park	5%	6%
Hostel, university or school dormitory	5%	6%
Own cottage or second home	3%	5%
Other	2%	1% ⊖

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=458) ■ Travellers to Canada (n=115)

Accommodation type	Total travellers	Travellers to Canada
Mid-priced hotel / motel	44%	37%
Rented house, apartment or condominium (e.g., Airbnb)	23%	29%
Luxury hotel	21%	15%
Budget hotel / motel	16%	17%
Bed & Breakfast (B&B)	13%	16%
Home of friends or relatives	11%	16%
Guest ranch, farm, or lodge	9%	13%
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	8%	13%
All-inclusive resort	7%	8%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	6%	12% ⊕
Camping or trailer park	5%	9%
Hostel, university or school dormitory	5%	9% ⊕
Own cottage or second home	3%	7% ⊕
Other	2%	2%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation (n=458); HVG (n=180); Travellers to Canada (n=115)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

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

Time of Year Travelled For Recent Trip

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

■ Total travellers (n=523) ■ Total HVG travellers (n=207)

Month	Total	HVG
December	9%	10%
January	8%	9%
February	9%	8%
March	10%	9%
April	10%	8%
May	13%	13%
June	12%	11%
July	12%	11%
August	12%	11%
September	11%	9%
October	12%	13%
November	10%	11%

	Total Travellers	HVG Travellers
Winter	20%	21%
Spring	28%	25%
Summer	34%	32%
Fall	28%	29%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=523) ■ Travellers to Canada (n=139)

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

	Total Travellers	Travellers to Canada
Winter	20%	15%
Spring	28%	31%
Summer	34%	41% ⊕
Fall	28%	27%

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

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Most Recent Trip to Canada

Niagara Falls
Ontario

Top 10 Activities Participated in During Recent Trip to Canada

Total Travellers (n=139)	Total HVG Travellers (n=64)
Nature walks	Nature walks
Nature parks	Nature parks
Local markets (e.g. public markets, farmers market, night markets)	Local markets (e.g. public markets, farmers market, night markets)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	City green spaces like parks or gardens
Hiking	Art galleries or museums ➕
City green spaces like parks or gardens	Hiking
Trying local food and drink	Trying local food and drink
Nightlife	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Guided city tours	Nightlife
Shopping for clothes and shoes	Shopping for items that help me remember my trip

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=139); HVG (n=64)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

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

Activities Participated in During Recent Trip to Canada

Legend: ■ Total Travellers ■ HVG Travellers

Activity	Total Travellers	HVG Travellers
Nature walks	51%	54%
Nature parks	43%	49%
Local markets (e.g. public markets, farmers market, night markets)	41%	49%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	39%	37%
Hiking	39%	40%
City green spaces like parks or gardens	39%	43%
Trying local food and drink	37%	37%
Nightlife	31%	33%
Guided city tours	29%	30%
Shopping for clothes and shoes	29%	22%
Art galleries or museums	29%	40% ➕
Lakeside beaches	28%	29%
Shopping for items that help me remember my trip	26%	32%
Fine dining	24%	28%
Autumn colours	24%	30%
Guided nature tours	24%	30%
Viewing wildlife or marine life	23%	25%
Historical, archaeological or world heritage sites	22%	29%
Kayaking, canoeing or paddle boarding	22%	15%

Activity	Total Travellers	HVG Travellers
Self-guided driving tours or road trips	21%	26%
Road cycling	21%	25%
Northern lights	20%	22%
Exploring places most tourists won't go to	20%	25%
Learning about Indigenous culture, traditions or history	20%	24%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	18%	20%
Camping	17%	19%
Breweries or wineries	17%	24%
Wilderness lodges	17%	19%
Cultural or traditional festivals	16%	16%
Culinary tours or cooking classes	16%	22%
Oceanside beaches	16%	19%
Amusement or theme parks	16%	19%
Snowshoeing or cross country skiing	16%	22%
Casual biking	16%	20%
Guided boat tours	15%	17%
Mountain biking	15%	17%
Sporting events (to attend or participate)	15%	16%
Travelling to remote destinations	15%	17%
Renting a recreational vehicle (RV)	12%	14%

Activity	Total Travellers	HVG Travellers
Spring blossoms	12%	9%
Comedy festivals	12%	14%
Music festivals	12%	9%
Food and drink festivals or events	12%	11%
Downhill skiing or snowboarding	11%	11%
Fishing or angling	11%	8%
Guided airplane or helicopter tours	11%	11%
Spa or wellness centres	10%	12%
Guided train tours	10%	13%
Winter festivals	10%	12%
Golfing	10%	13%
Cruises	10%	8%
Movie festivals	9%	11%
Shopping for luxury items	9%	14%
Rodeos	9%	10%
Heli-skiing	8%	9%
Hunting	6%	8%
Agricultural or country farm tours	5%	9%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=139); HVG (n=64)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

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Canadian Destinations Visited During Recent Trip

Total Travellers

Total HVG Travellers

Northwest Territories
4%	8%	
3%	5%	Yellowknife
1%	2%	Inuvik
1%	3%	Other – NWT

Nunavut
1%	2%	
1%	2%	Iqaluit
-	-	Other – NU

Quebec
60%	62%	
51%	54%	Montréal
44%	47%	Québec City
16%	17%	Mont Tremblant
24%	26%	Other – QC

Yukon
6%	9%	
3%	6%	Whitehorse
4%	8%	Dawson City
2%	3%	Other – YT

Newfoundland & Labrador
7%	12% +	
6%	12% +	St. John's
4%	6%	Other - NL

British Columbia
21%	23%	
12%	20% +	Rocky Mountains
16%	20%	Vancouver
12%	16%	Victoria
5%	8%	Whistler
8%	9%	Okanagan
3%	5%	Other – BC

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

New Brunswick
5%	10% +	
3%	6% +	Fredericton
2%	5%	Saint John
1%	3%	Other - NB

Alberta
18%	19%	
8%	13%	Rocky Mountains
11%	11%	Calgary
9%	16% +	Edmonton
7%	6%	Banff
7%	8%	Jasper
4%	3%	Other – AB

Nova Scotia
10%	11%	
6%	6%	Halifax
6%	8%	Cape Breton
3%	3%	Other - NS

Saskatchewan
7%	2% −	
3%	2%	Regina
4%	2%	Saskatoon
2%	-	Other – SK

Manitoba
11%	13%	
9%	11%	Winnipeg
6%	10%	Churchill
2%	2%	Other – MB

Ontario
38%	42%	
21%	22%	Ottawa
24%	34% +	Niagara Falls
29%	37% +	Toronto
4%	5%	Muskoka
5%	9%	Other – ON

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=139); HVG (n=64)
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)

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

Number of Visits Ever & Time of Year Visited Canada

Total Travellers ■ **Total HVG Travellers**

1 time	49% / 41% 🔴
2 times	24% / 23%
3+ times	27% / 36% 🟢

Total Travellers ■ **Total HVG Travellers**

Month	Total Travellers	Total HVG Travellers	Season	Total Travellers	Total HVG Travellers
December	11%	11%	Winter	22%	23%
January	10%	10%			
February	12%	12%			
March	13%	15%	Spring	34%	36%
April	13%	14%			
May	17%	20%			
June	22%	23%	Summer	51%	48%
July	23%	21%			
August	22%	19%			
September	24%	30%	Fall	36%	42% 🟢
October	16%	20%			
November	9%	11%			

France GTRP – December 2023

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

Demographics

	All Long-haul Travellers (n=1504)	HVG Audience (n=331)
Gender		
Male	56%	67% 🟢
Female	45%	33% 🔴
Age		
18 to 34	37%	27% 🔴
35 to 54	33%	29%
55 or older	30%	44% 🟢
Children in household under the age of 18		
Yes	44%	43%
Employed		
Yes	65%	65%
Identify as LGBTQ+		
Yes	11%	6% 🔴
Household Income (Annually)		
Under 15,000€	15%	2% 🔴
15,000€ to 39,999	36%	12% 🔴
40,000€ or more	38%	82% 🟢

France GTRP – December 2023

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

THANK YOU

DESTINATION CANADA

CANADIAN TOURISM DATA collective