

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

AUSTRALIA HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



CONTENTS

03 Study Overview:
Australia Market

04 Key Insights

05 Market Sizing

12 Considering
Canada as a Travel
Destination

15 Travel Behaviours

20 Indigenous
Tourism Activities

22 Trip to Canada in
the Past 3 Years

STUDY OVERVIEW: AUSTRALIA MARKET

Target Population

The target population are residents who are aged 18 years or more, who have taken a long-haul pleasure holiday and stayed at least four nights in a paid accommodation in the last three years or are thinking about doing so in the next two years.

Timing of fieldwork

December 5th-22nd 2023

Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of Australia, New Zealand and the Pacific Islands

To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). The project has also been migrated over to YouGov's proprietary panel. As a result, no trending is available for the Australian market.

Key Insights



Canada ranks fourth in destination consideration, after Japan, the United Kingdom, and the United States, with an anticipated 3.4 million visitors in the next two years



Potential visitors to Canada are more likely to consider a visit during the Summer months



Trying local cuisine ranks as the primary activity for Australian travellers, followed by exploring natural attractions, hiking in nature, and visiting local markets



Travellers to Canada in the past 3 years were mostly with a significant other, friends, or solo



Top Indigenous activities to Canada include exploring Indigenous cuisine, embarking on nature adventures, and visiting Indigenous sites

MARKET SIZING



Kyle
Saskatchewan



LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more¹

20,129,000

X

Incidence rate: Long-haul pleasure travellers who have taken a trip in the past 3 years or plan to in the next 2 years²

51.5%

=



Size of the Long-haul Pleasure Traveller Target market

10,366,500

This study was conducted among long-haul pleasure travellers, represented by 10.4M Australians aged 18 years or more.



Essipit
Quebec

Base: General population aged 18+ (n=1080)

¹Source: Estimates June 2023, Australian Bureau of Statistics

²Note: Results are from 2023 YouGov Canada Omnibus Survey

SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



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

10,366,500

X

Target Market for Canada

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

71.5%

=



Size of the target market

7,412,000

X

Immediate Potential for Canada

Will definitely/very likely visit Canada in the next 2 years¹

45.7%

=



Immediate potential

3,387,500

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

7 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) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

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

The next 2-year immediate potential for Canada is 3.4 million long-haul pleasure travellers.



Grand Manan Island
New Brunswick

Australia GTRP –
December 2023

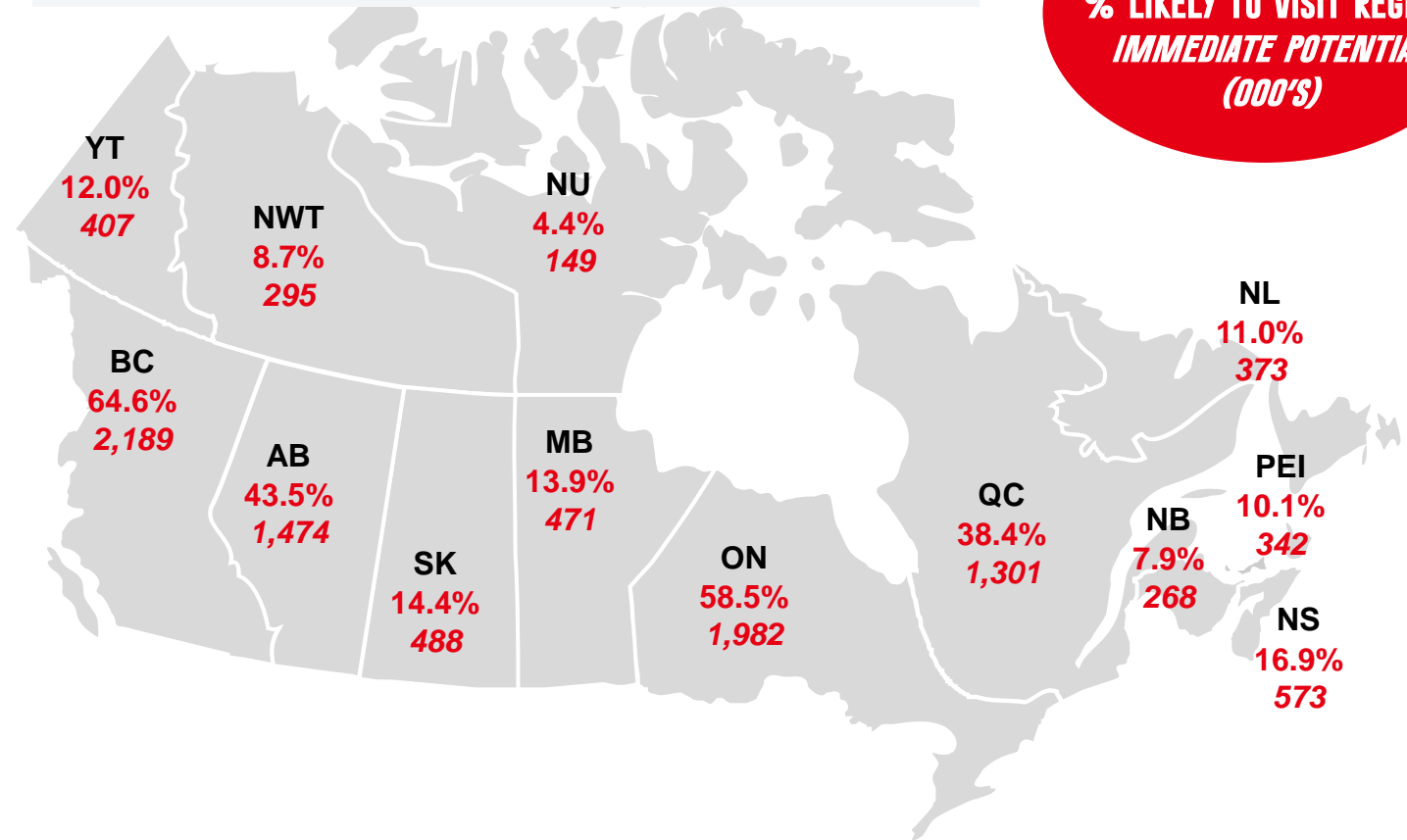


POTENTIAL MARKET SIZE FOR THE REGIONS

British Columbia and Ontario each have the potential to draw in around 2 million Australian travellers over the next 2 years.

IMMEDIATE POTENTIAL FOR CANADA: 3,387,500

KEY
% LIKELY TO VISIT REGION
IMMEDIATE POTENTIAL
(000'S)



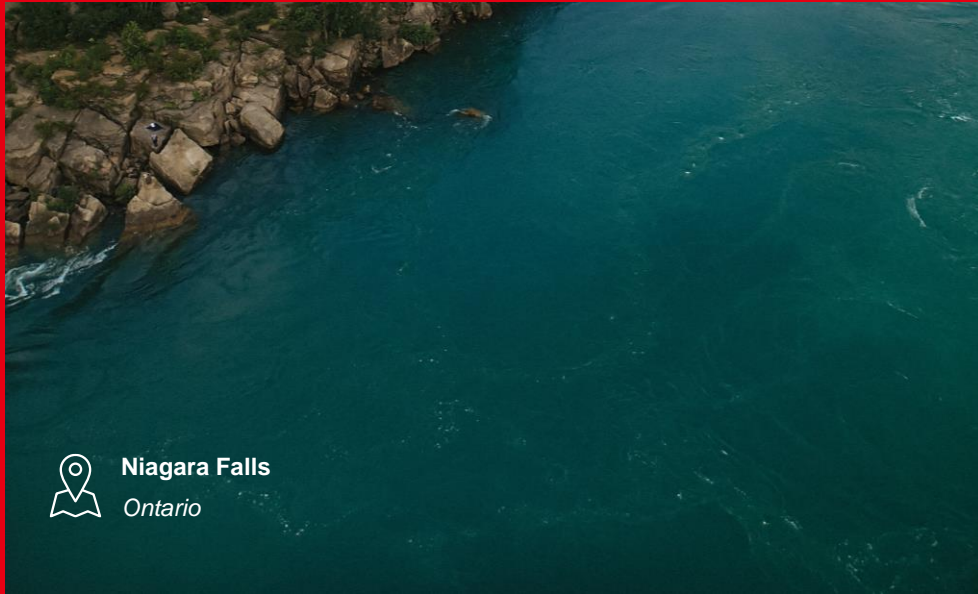
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1136)
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all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



TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



The top travel destinations are Vancouver, Toronto, Niagara Falls, and the Rocky Mountains.



Niagara Falls
Ontario

British Columbia	
Vancouver	46%
Rocky Mountains	35%
Whistler	25%
Victoria	22%
Okanagan	8%
Other – BC	6%

Ontario	
Toronto	42%
Niagara Falls	39%
Ottawa	28%
Muskoka	6%
Other – ON	3%

Alberta	
Rocky Mountains	26%
Banff	21%
Calgary	21%
Jasper	16%
Edmonton	12%
Other – AB	4%

Quebec	
Montréal	29%
Québec City	26%
Mont Tremblant	7%
Other – QC	4%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1136)
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Saskatoon	9%
Regina	6%
Other – SK	2%

Manitoba	
Winnipeg	9%
Churchill	7%
Other – MB	2%

New Brunswick	
Saint John	5%
Fredericton	4%
Other – NB	2%

Nova Scotia	
Halifax	12%
Cape Breton	8%
Other – NS	3%

Prince Edward Island	
Charlottetown	8%
Other – PEI	3%

Newfoundland & Labrador	
St. John's	7%
Other – NL	4%

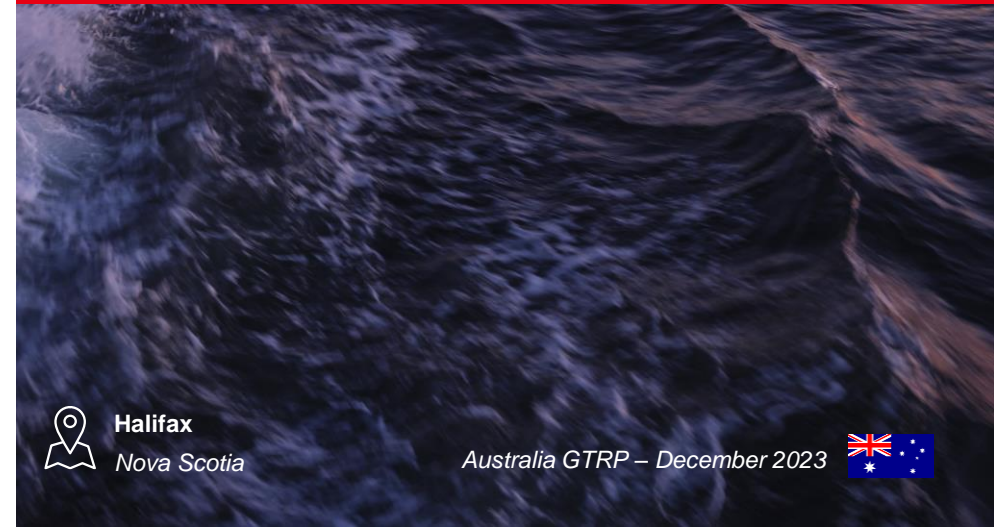
Yukon	
Whitehorse	7%
Dawson City	5%
Other – YT	3%

Northwest Territories	
Yellowknife	5%
Inuvik	3%
Other – NWT	2%

Nunavut	
Iqaluit	3%
Other – NU	2%



Potential travellers to Canada have some interest in visiting Nova Scotia, specifically Halifax.



10 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1136) Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	16%	20%	26%	21%
Alberta	10%	13%	18%	12%
Saskatchewan	3%	5%	6%	4%
Manitoba	3%	5%	6%	4%
Ontario	12%	15%	24%	18%
Quebec	8%	9%	15%	13%
New Brunswick	2%	3%	3%	3%
Nova Scotia	4%	6%	8%	6%
Prince Edward Island	3%	4%	4%	4%
Newfoundland & Labrador	2%	3%	5%	3%
Yukon	2%	3%	6%	4%
Northwest Territories	2%	3%	4%	3%
Nunavut	1%	1%	2%	2%



Potential travellers to Canada are most interested in visiting Canada during the summer months. There is also some interest in visiting during the spring and fall months.



Falcon Trails Resort
Manitoba

Australia GTRP – December 2023





Peggy's Cove
Nova Scotia



CANADIAN TOURISM DATA
collective



DESTINATION
CANADA

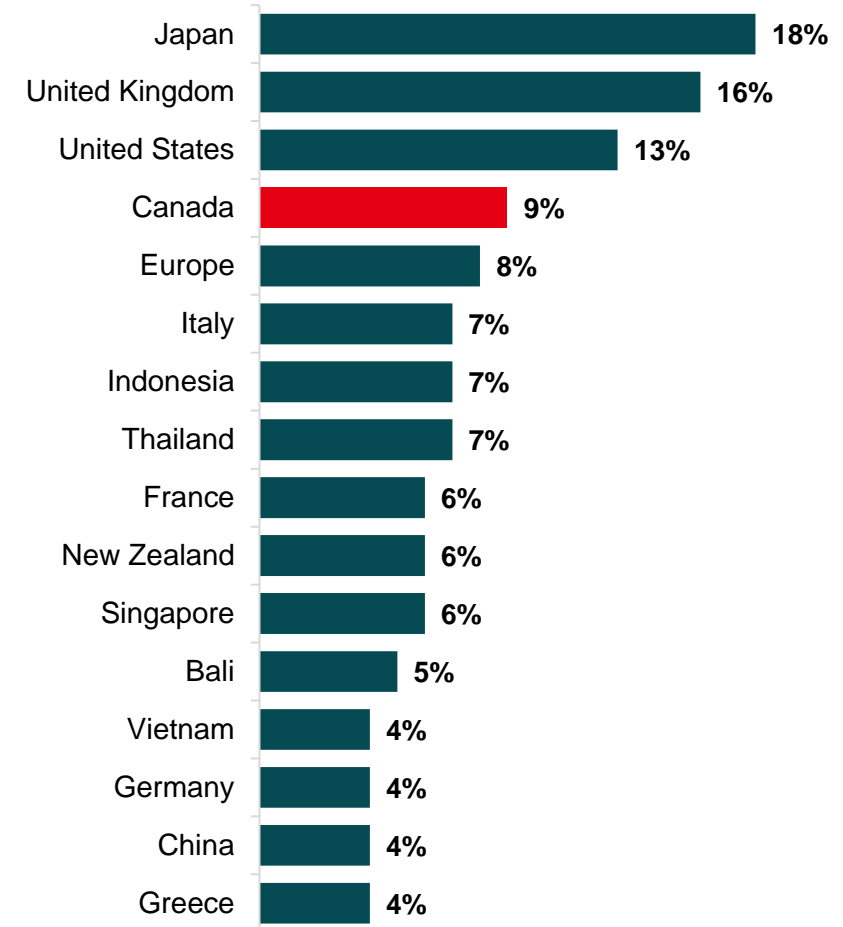
CONSIDERING CANADA AS A TRAVEL DESTINATION

Australia GTRP – December 2023



UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

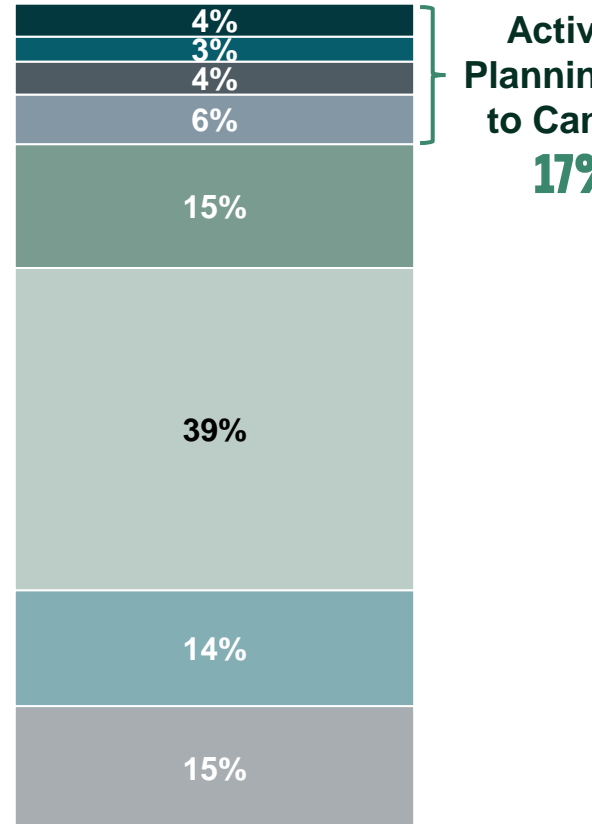
Canada ranks fourth for unaided destination consideration, behind Japan, the United Kingdom, and the United States.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1590)
 You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)
¹Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

STAGE IN THE PURCHASE CYCLE FOR CANADA

- 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



Actively
Planning trip
to Canada
17%

Almost two in ten Australian
travellers are actively planning a
trip to Canada.

TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

65%

Trying Local Food and Drink

62%

Natural Attractions

61%

Nature Walks

60%

Local Markets

56%

Oceanside Beaches

52%

Historical, Archaeological or World Heritage Sites

48%

Viewing Wildlife or Marine Life

48%

Nature Parks

47%

Art Galleries or Museums

46%

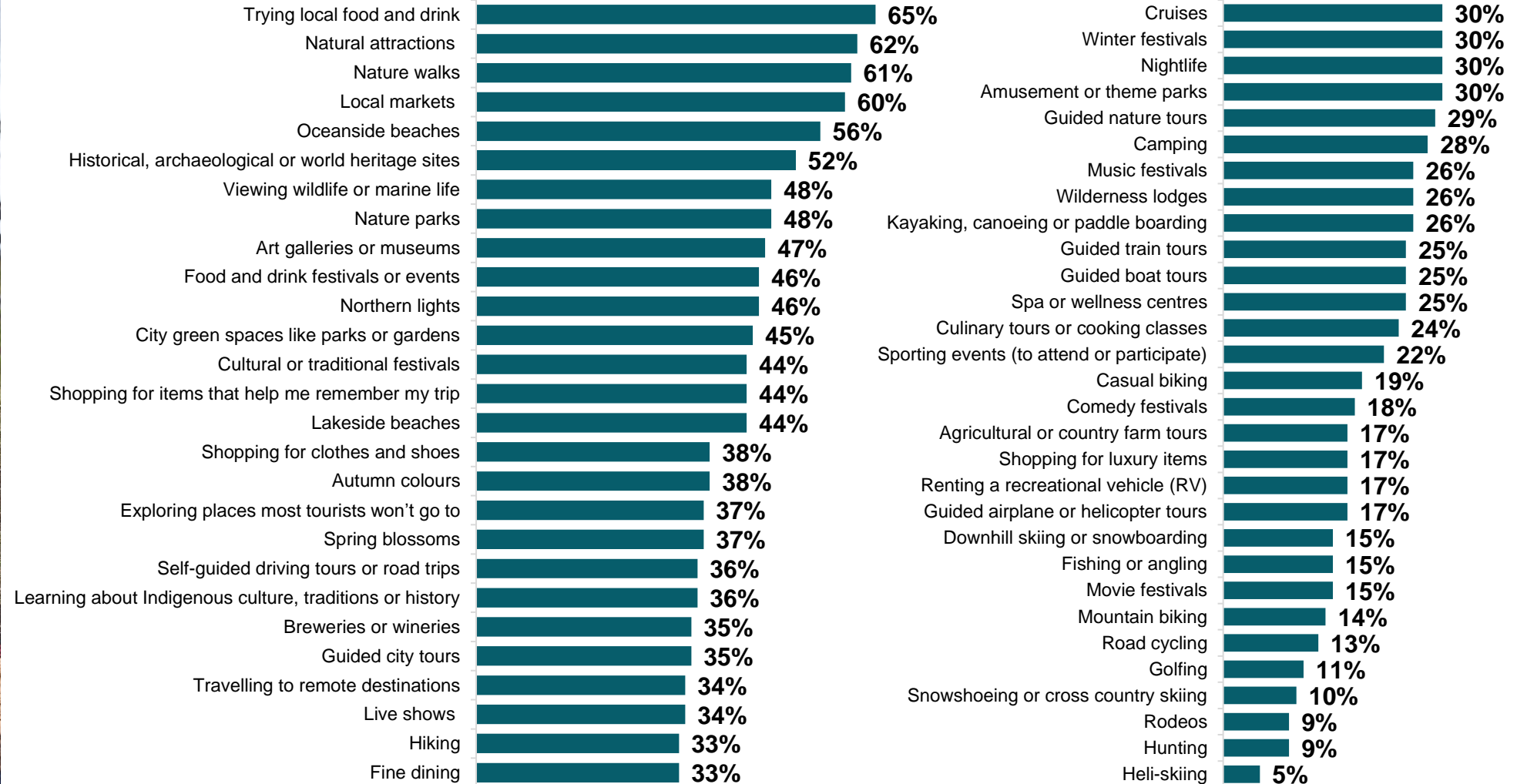
Food and Drink Festivals or Events



The top activity for Australian travellers involves trying local food. Other popular activities include natural attractions, nature walks, and local markets.



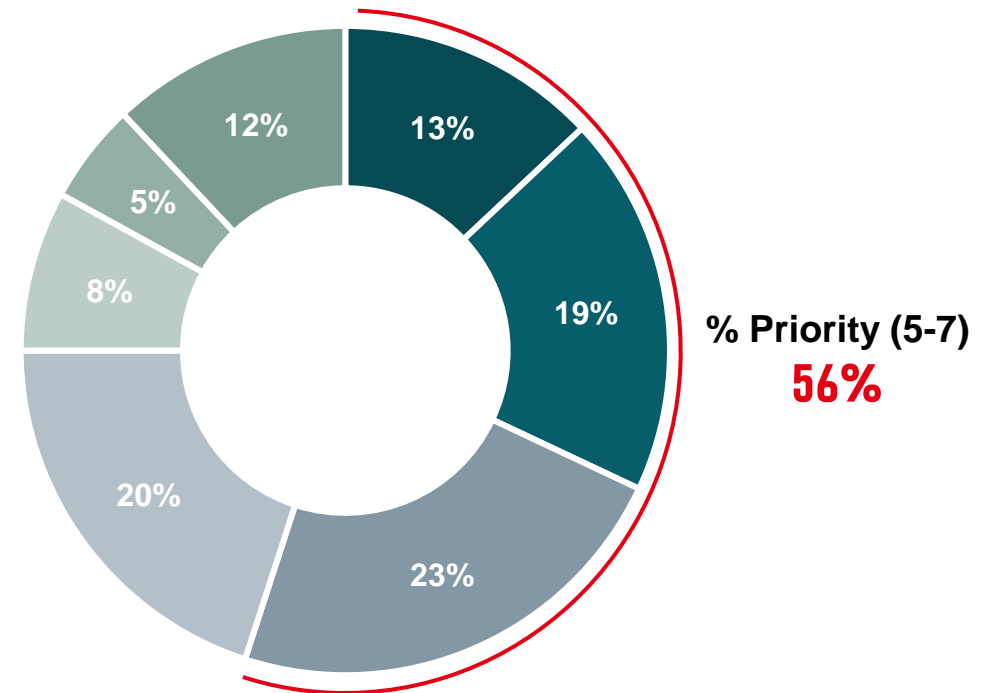
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



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



PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



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

Over half of Australian travellers consider sustainability to be a priority.

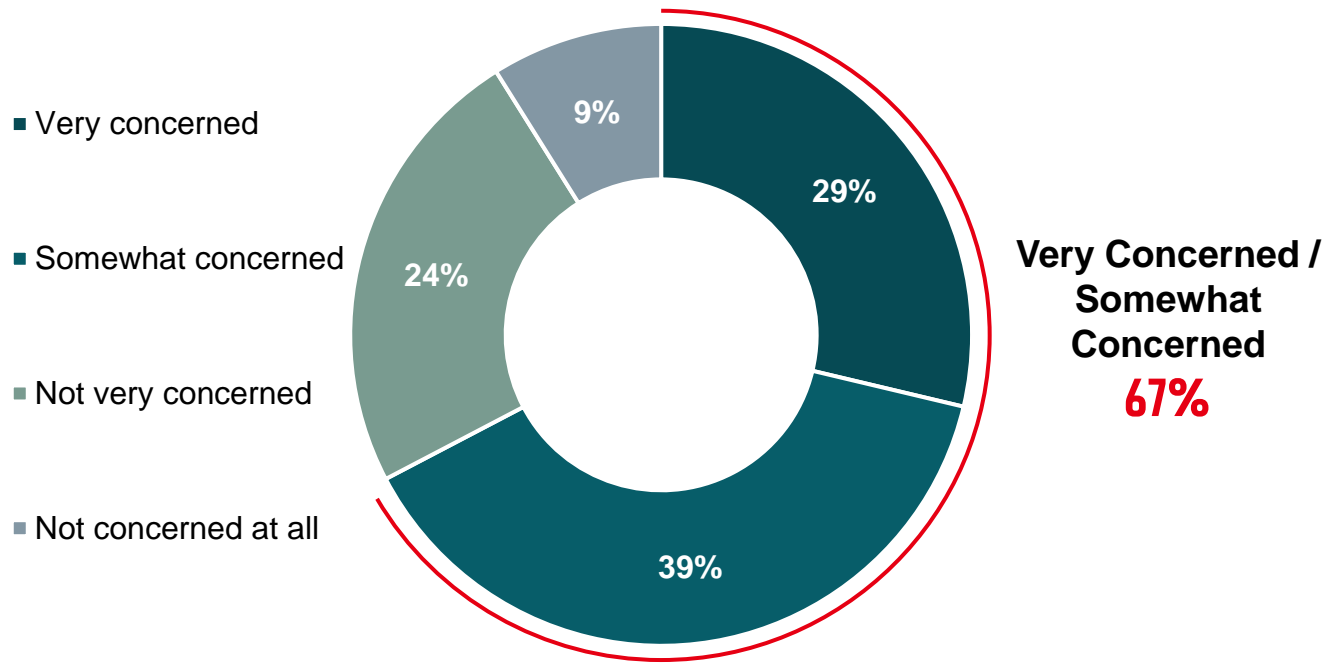


Nahanni

Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1590)
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'.
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".

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



24% Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=792)
 How concerned are you about extreme weather events affecting your travel plans?
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?
 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.



Two-thirds of Australian travellers are concerned about extreme weather events impacting their travel plans.



INDIGENOUS TOURISM ACTIVITIES

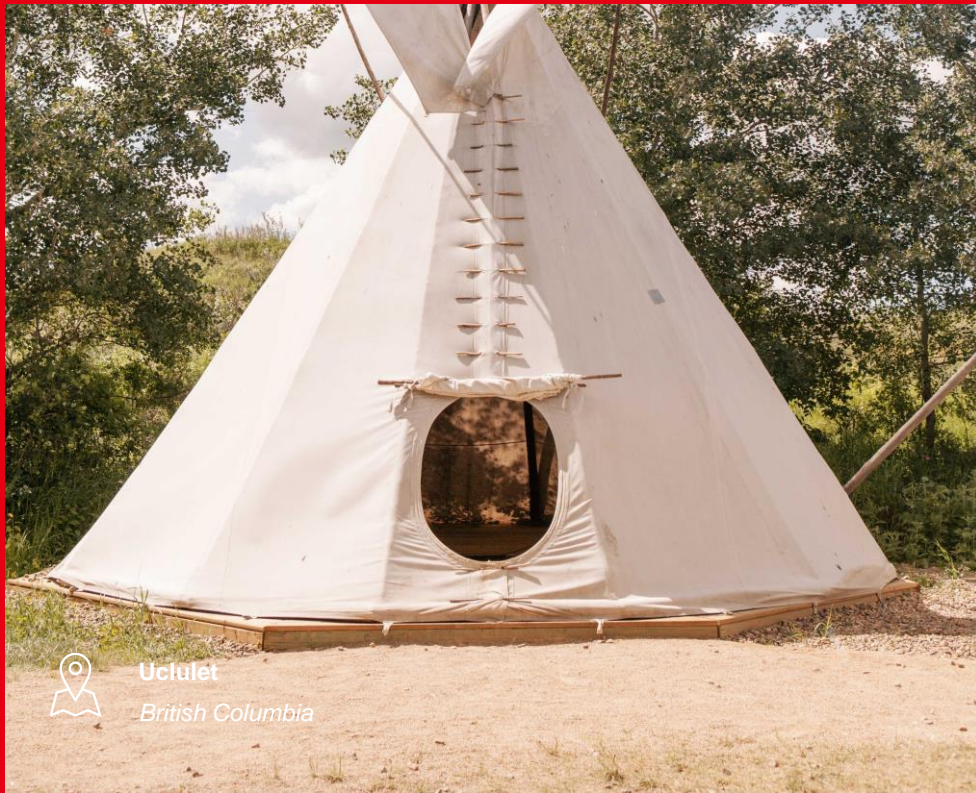


British Columbia



INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

The most popular Indigenous activities among potential Australian travellers to Canada involve experiencing Indigenous food, going on Indigenous nature adventures, and visiting Indigenous sites.



% Somewhat/Very Interested



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

TRIP TO CANADA IN THE PAST 3 YEARS



Jasper
Alberta



TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years were most likely to go on nature walks, see natural attractions, and visit city green spaces during their trip to Canada.

39%

Nature Walks

27%

Trying Local Food and Drink

36%

Natural Attractions

26%

Camping

33%

City Green Spaces

25%

Local Markets

28%

Shopping for Clothes and Shoes

24%

Hiking

27%

Nature Parks

23%

Road Cycling

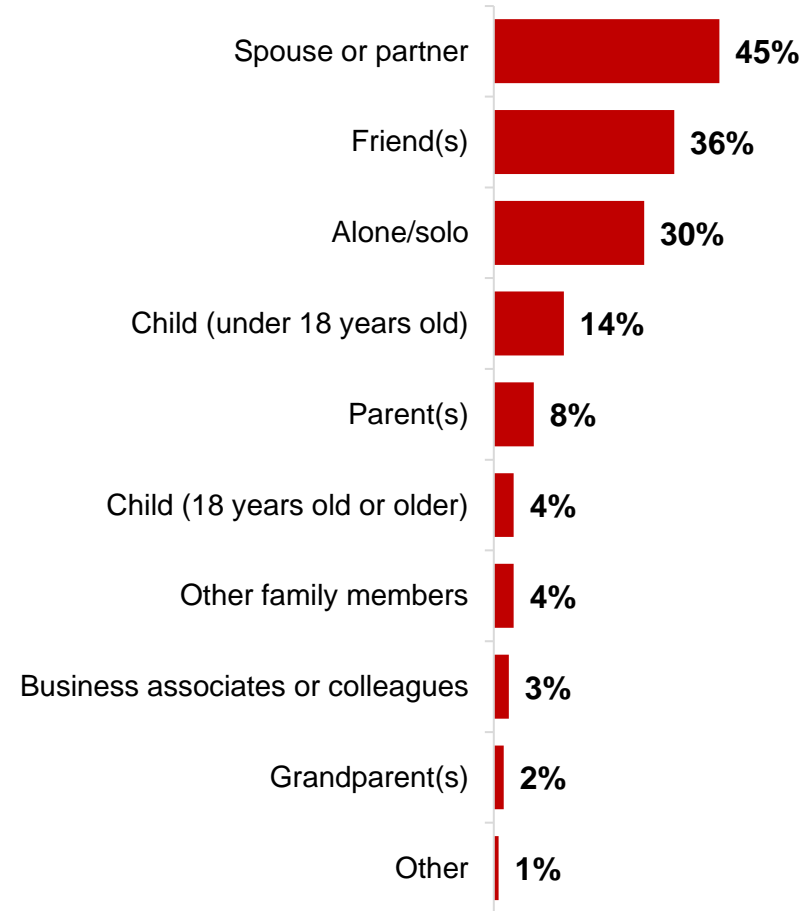
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=199)
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon
Alberta

TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years most often visited Canada with a spouse or partner. Visiting with friends as well as solo trips were also popular.

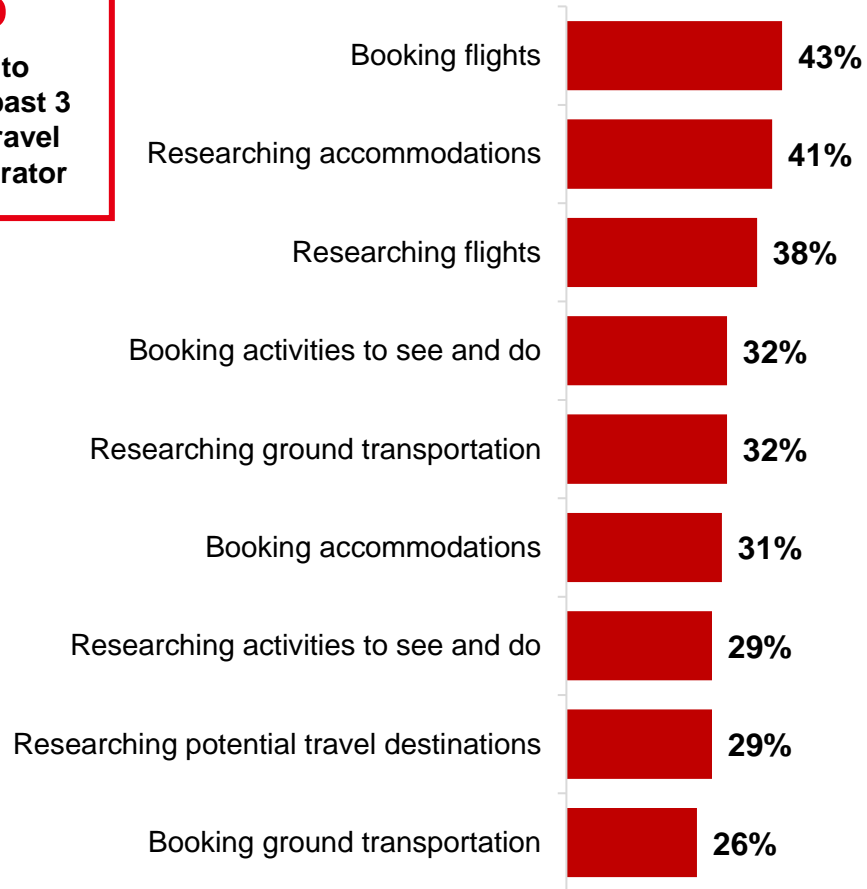


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=199)
With whom did you travel on this trip? (Select all that apply)



TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

66%
of travellers to Canada in the past 3 years used a travel agent/ tour operator



Two-thirds of travellers to Canada in the past 3 years used a travel agent or tour operator, mostly for booking flights and researching accommodations.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada, Used a Travel Agent/Tour Operator (n=132)
Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Intrepid Travel, they do not include online booking engines like Expedia or Webjet. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
Which of the following did a travel agent or tour operator help you with?

ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

Over half of travellers to Canada in the past 3 years reported that their entire trip was part of an organized group tour.

Yes, my whole trip was part of an organized group tour

54%

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

12%

No

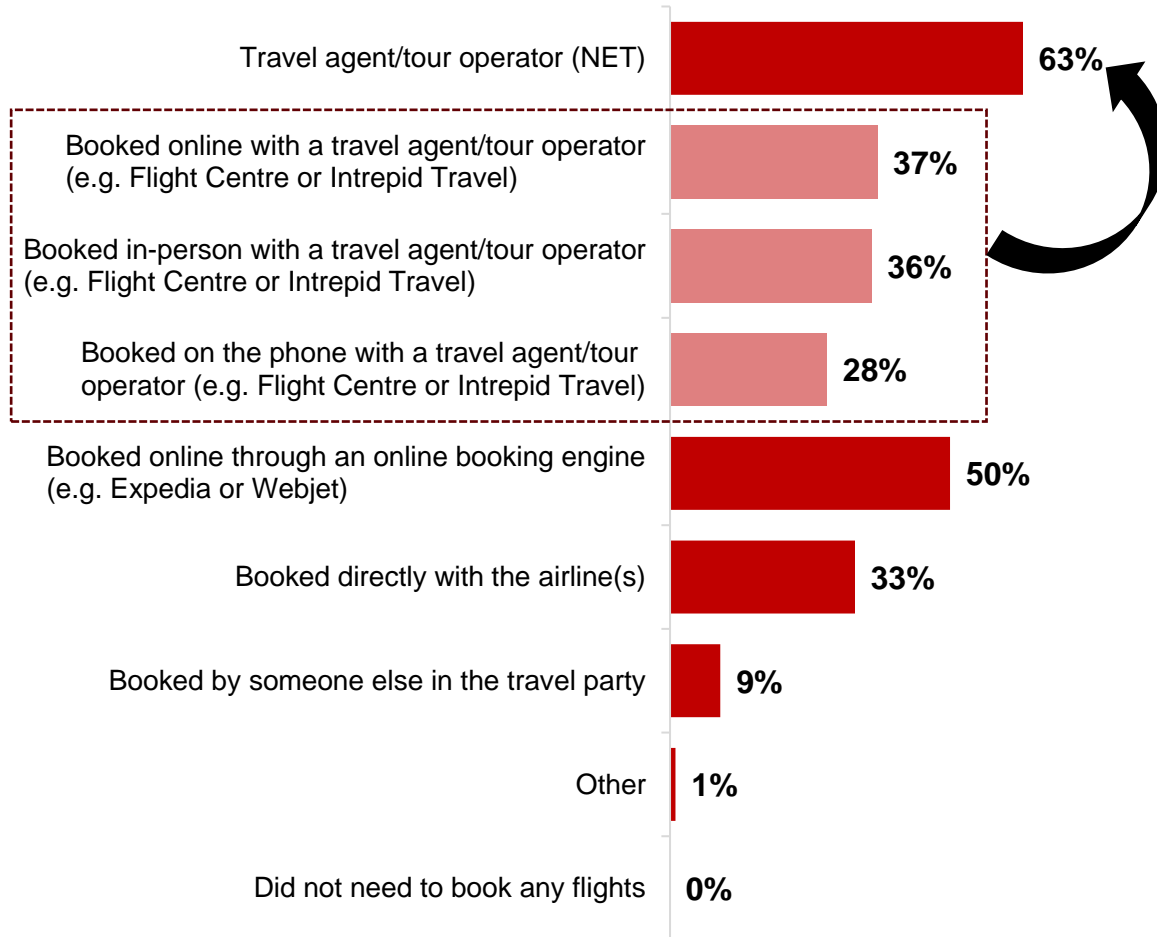
34%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=199)
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?



Miramichi River
New Brunswick

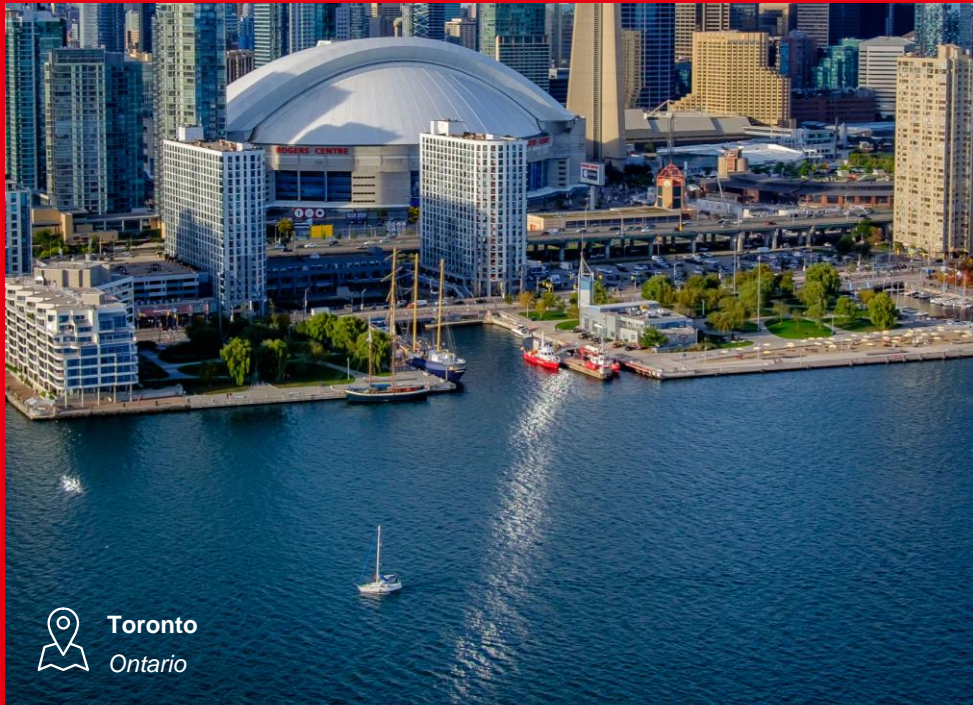
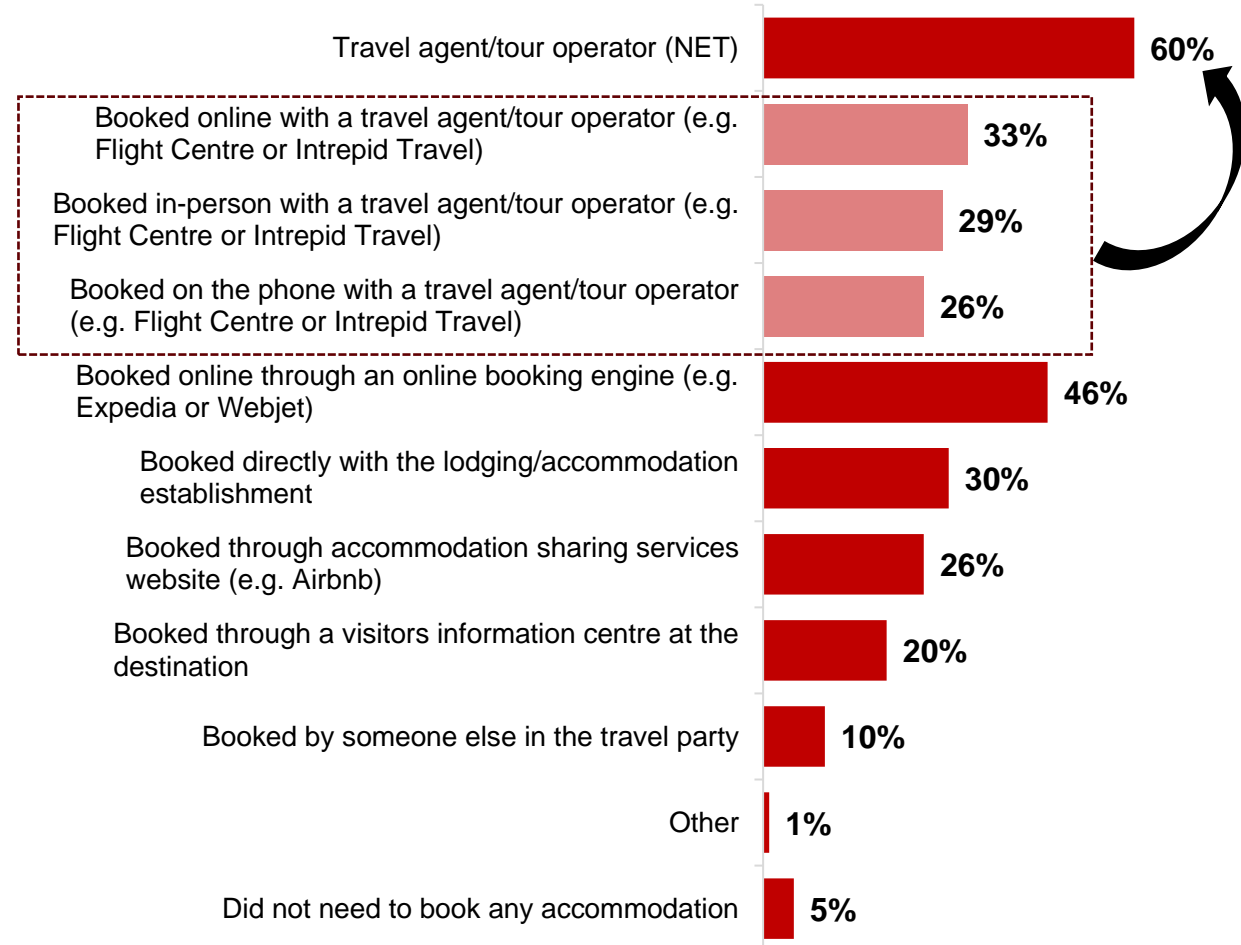
BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA



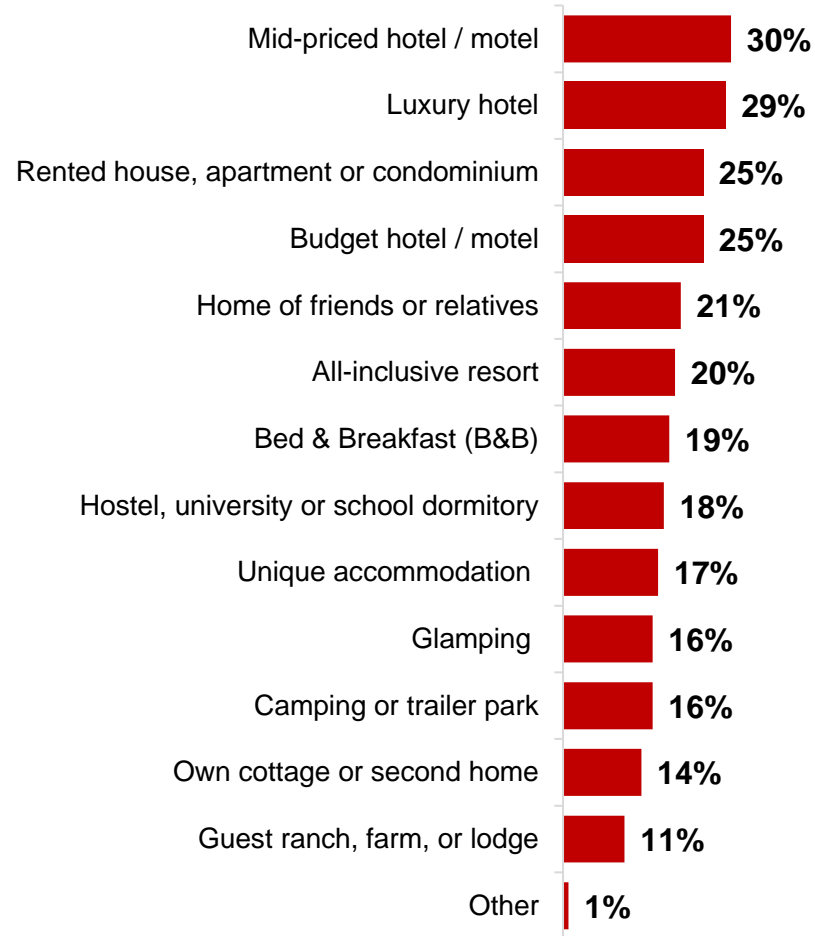
Travellers to Canada in the past 3 years were most likely to book flights with a travel agent or tour operator, followed by through an online booking engine.

BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years were also most likely to book accommodations with a travel agent or tour operator, followed by using an online booking engine.



TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



29 Base: Long-haul holiday travellers (past 3 years or next 2 years), Travellers to Canada (n=189)

Which type of accommodation did you stay in during this trip? (Select all that apply)



The most popular accommodation options for travellers to Canada in the past 3 years were hotels and rented accommodations.



THANK YOU

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



CANADIAN TOURISM DATA
collective