

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## CHINA HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador





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# STUDY OVERVIEW: CHINA MARKET

## Target Population

The target population are residents (from 11 target cities\*) 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 11<sup>th</sup> - 23<sup>th</sup> 2023

## Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)

## 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). As a result, no trending is available for the Chinese market.

\* 11 target cities = Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao, Nanjing

# Key Insights



**The next 2-year immediate potential for Canada is 19.1 million Chinese travellers, benefiting from a robust traveller base despite lower levels of initial consideration**



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



**Chinese travellers favour nature walks and oceanside beaches, alongside local dining, natural attractions, and lakeside beaches**



**In the past three years, most travellers to Canada visited with a spouse or partner, though solo trips and traveling with friends were also common choices**



**Potential Chinese travellers to Canada are keen on Indigenous activities, especially attending performances, trying local cuisine, and visiting cultural sites**



# MARKET SIZING



Kyle  
Saskatchewan



# LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more<sup>1</sup>  
(among 11 target cities\*)

**105,639,500**

X

**Incidence rate:** Long-haul pleasure travellers  
who have taken a trip in the past 3 years or plan  
to in the next 2 years<sup>2</sup>

**27.0%**

=



**Size of the Long-haul Pleasure  
Traveller Population**

**28,522,500**

This study was conducted among long-haul pleasure travellers, represented by 28.5M Chinese people aged 18 years or more.



Essipit  
Québec

\* 11 target cities = Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao, Nanjing

Base: General population aged 18 plus in 11 cities (n=4475)

<sup>1</sup> Source: Estimates 2020 Census, China National Bureau of Statistics

<sup>2</sup>Note: Results are from a random telephone omnibus survey undertaken in 2014.



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



Total potential long-haul pleasure travellers aged 18 years or more (among 11 target cities\*)

**28,522,500**

X

**Target Market for Canada**  
Those in the dream to purchase stages of the path to purchase for Canada

**76.0%**

=



Size of the target market

**21,677,000**

X

**Immediate Potential for Canada**  
Will definitely/very likely visit Canada in the next 2 years<sup>1</sup>

**88.1%**

=



**Immediate potential**

**19,097,500**

\* 11 target cities = Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao, Nanjing  
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=2204); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1676)

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)

<sup>1</sup>Includes 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 19.1 million long-haul pleasure travellers.

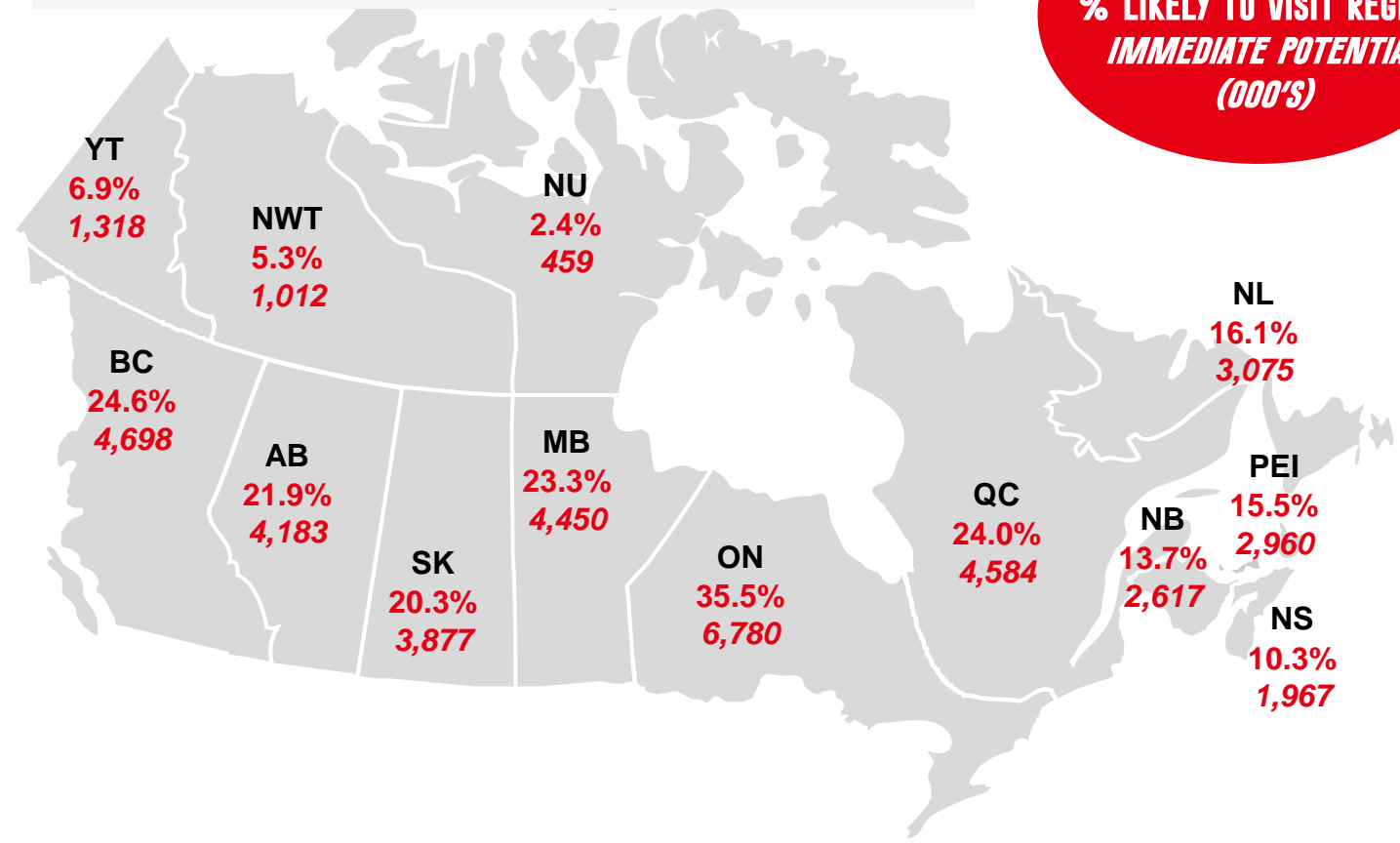


# POTENTIAL MARKET SIZE FOR THE REGIONS

Ontario has the potential to draw in over 6 million Chinese travellers in the next two years, while British Columbia, Québec, and Alberta have the potential to draw in over 4 million Chinese travellers.

IMMEDIATE POTENTIAL FOR CANADA: 19,097,500

**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=1676)  
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)

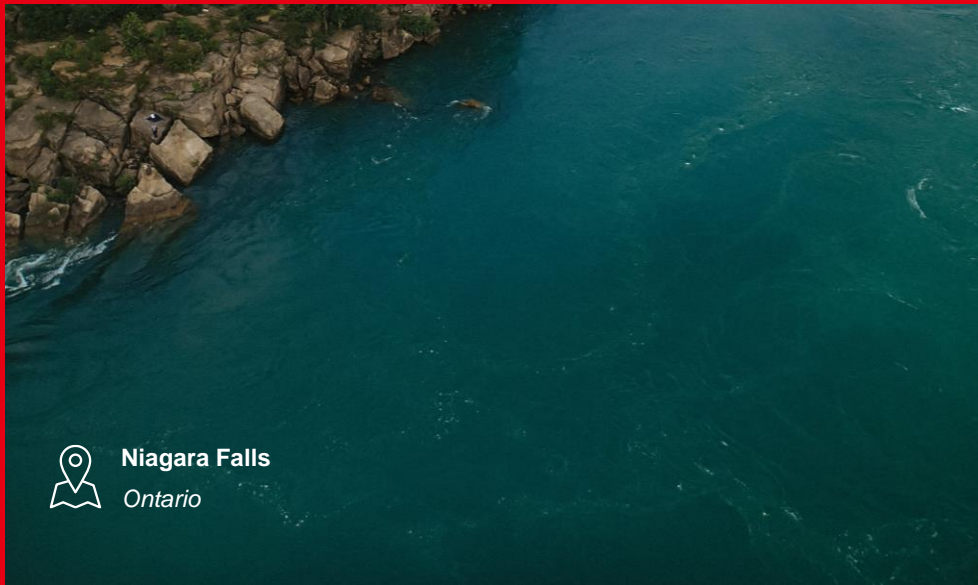





# TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Potential travellers to Canada are most likely to visit Toronto, Niagara Falls, Vancouver, and Ottawa.



 **Niagara Falls**  
Ontario

British Columbia	
Vancouver	18%
Rocky Mountains	15%
Victoria	12%
Okanagan	5%
Whistler	5%
Other – BC	2%

Alberta	
Rocky Mountains	9%
Edmonton	7%
Jasper	7%
Banff	6%
Calgary	6%
Other – AB	2%

Ontario	
Toronto	21%
Niagara Falls	19%
Ottawa	18%
Muskoka	9%
Other – ON	3%

Québec	
Mont Tremblant	13%
Québec City	13%
Montréal	12%
Other – QC	3%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1676)  
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

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

Saskatchewan	
Regina	10%
Saskatoon	10%
Other – SK	7%

Manitoba	
Winnipeg	12%
Churchill	11%
Other – MB	8%

New Brunswick	
Saint John	8%
Fredericton	7%
Other – NB	4%

Nova Scotia	
Halifax	6%
Cape Breton	5%
Other – NS	4%

Prince Edward Island	
Charlottetown	11%
Other – PEI	10%

Newfoundland & Labrador	
St. John's	13%
Other – NL	9%

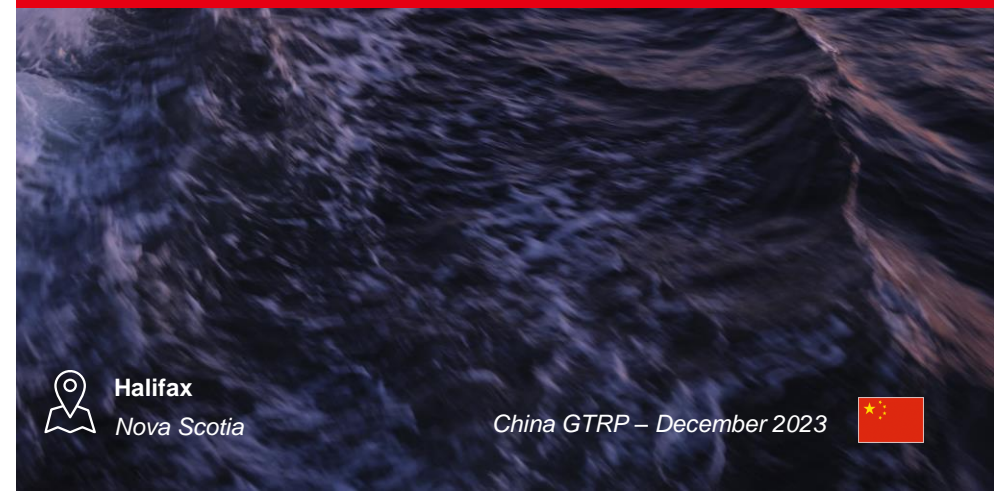
Yukon	
Dawson City	4%
Whitehorse	4%
Other – YT	3%

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

Nunavut	
Iqaluit	2%
Other – NU	2%



Potential travellers to Canada are also somewhat interested in visiting St. John's, Winnipeg, Charlottetown, and Churchill.



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=1676) 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	5%	8%	9%	10%
Alberta	5%	11%	8%	5%
Saskatchewan	4%	12%	7%	4%
Manitoba	3%	10%	9%	6%
Ontario	5%	12%	16%	11%
Québec	3%	9%	10%	8%
New Brunswick	2%	6%	6%	4%
Nova Scotia	2%	3%	4%	4%
Prince Edward Island	3%	6%	6%	5%
Newfoundland & Labrador	2%	6%	7%	6%
Yukon	1%	4%	3%	2%
Northwest Territories	1%	2%	3%	2%
Nunavut	0%	1%	1%	1%



**Potential travellers to Canada are most interested in visiting during the spring and summer months.**




**Falcon Trails Resort**  
 Manitoba



**11** Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1676)  
 During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



Peggy's Cove  
Nova Scotia



CANADIAN TOURISM DATA  
collective



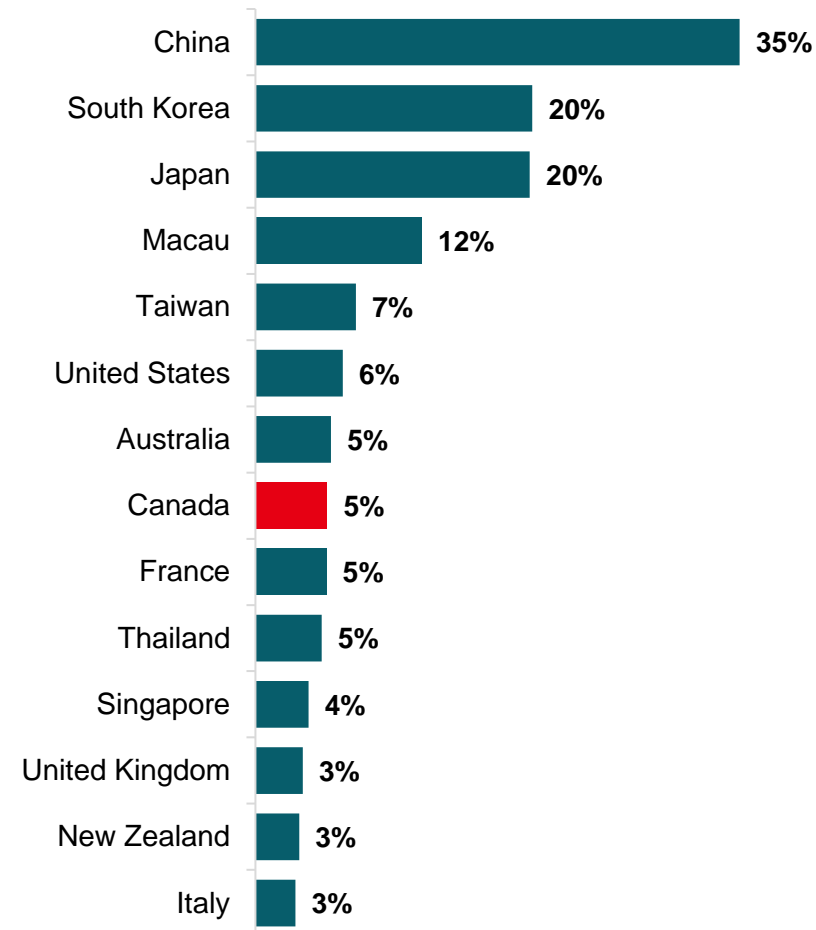
DESTINATION  
CANADA

# CONSIDERING CANADA AS A TRAVEL DESTINATION





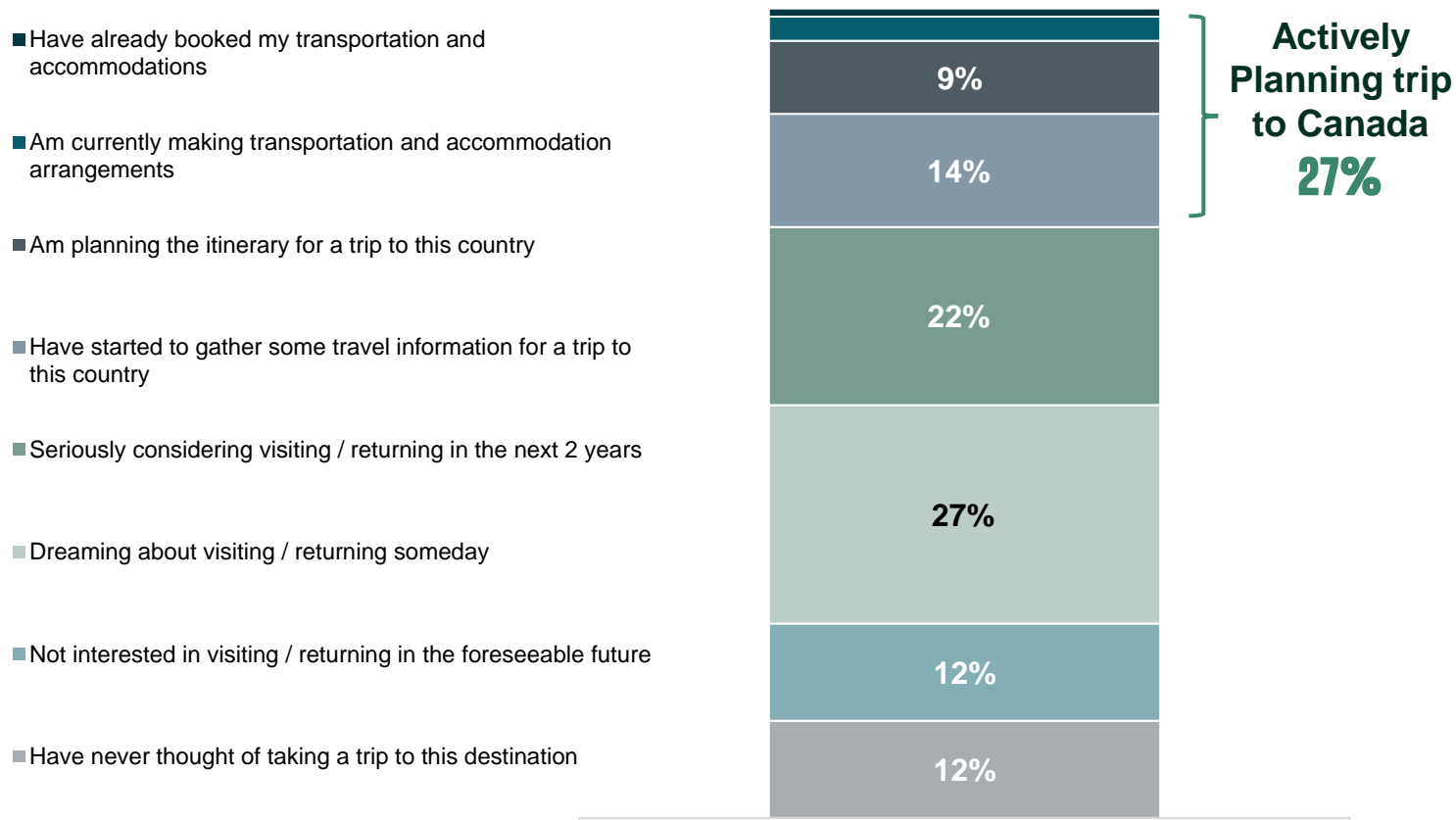
# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>



Despite being asked about long-haul destinations, top destinations being considered are predominantly East Asian countries on an unaided basis. Canada is mentioned in similar proportions alongside non-East Asian countries, such as the United States, Australia, and France.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2204)  
 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)  
<sup>1</sup>Note: 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



**Over one in four Chinese travellers are actively planning a trip to Canada.**

Lake Louise  
Alberta

China GTRP – December 2023



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



# TRAVEL BEHAVIOURS



Whitehorse  
Yukon



# TOP 10 GENERAL ACTIVITIES INTERESTED IN

**39%**

Nature Walks

**30%**

Amusement or Theme Parks

**37%**

Oceanside Beaches

**28%**

Historical, Archaeological, or World Heritage Sites

**35%**

Trying Local Food and Drink

**27%**

Nature Parks

**35%**

Natural Attractions

**27%**

Cultural or Traditional Festivals

**35%**

Lakeside Beaches

**27%**

Autumn Colours



The top activities Chinese travellers interested in were nature walk and oceanside beaches. Also popular were local dining, natural attractions, and lakeside beaches.





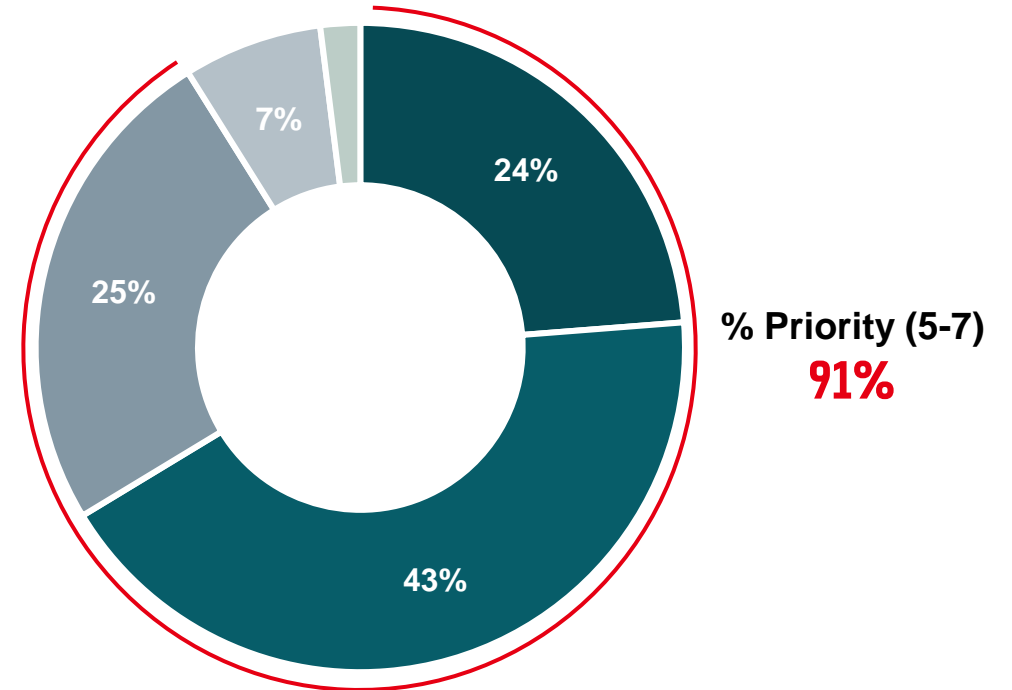
# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



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

Chinese travellers are very sustainability minded, with nine out of ten considering sustainability to be a travel priority.

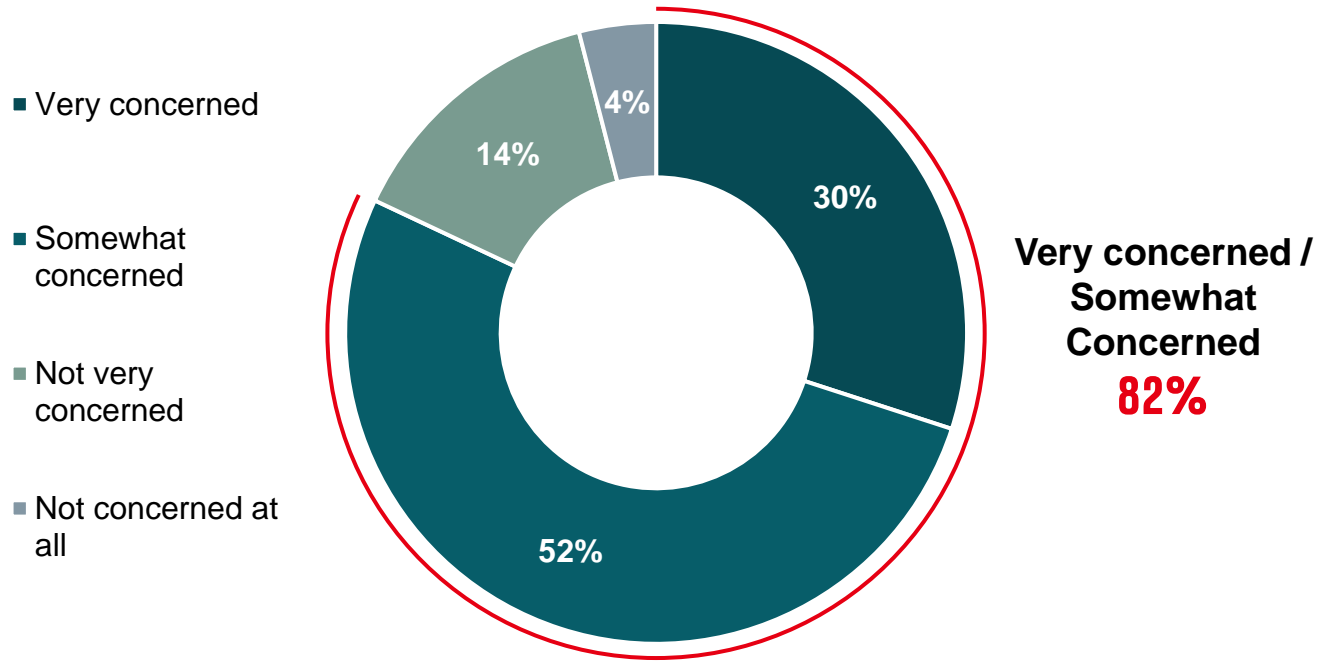


Nahanni  
Northwest Territories

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

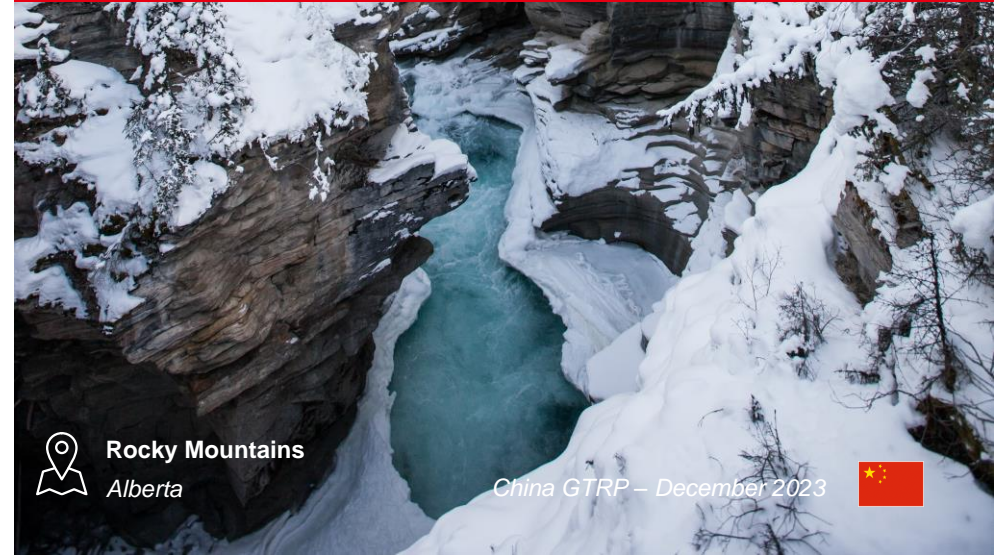


**53%** Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1112)  
 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.



**Eight in ten Chinese travellers are concerned about the impact of extreme weather on travel plans, with over half having changed travel plans in the past three years due to weather issues.**





# INDIGENOUS TOURISM ACTIVITIES



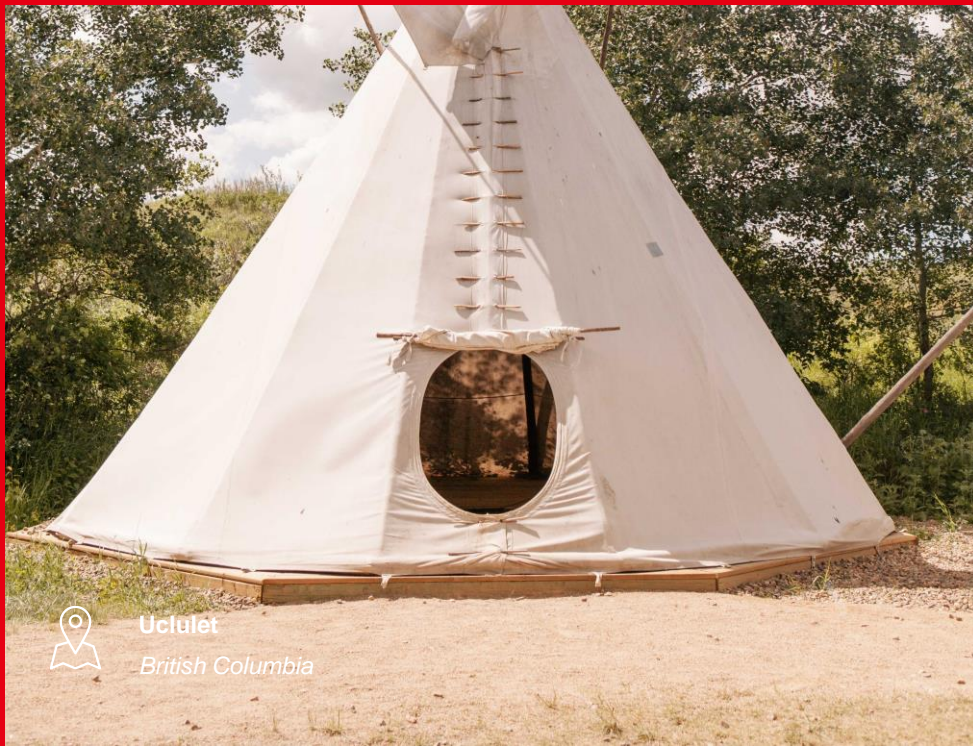
British Columbia



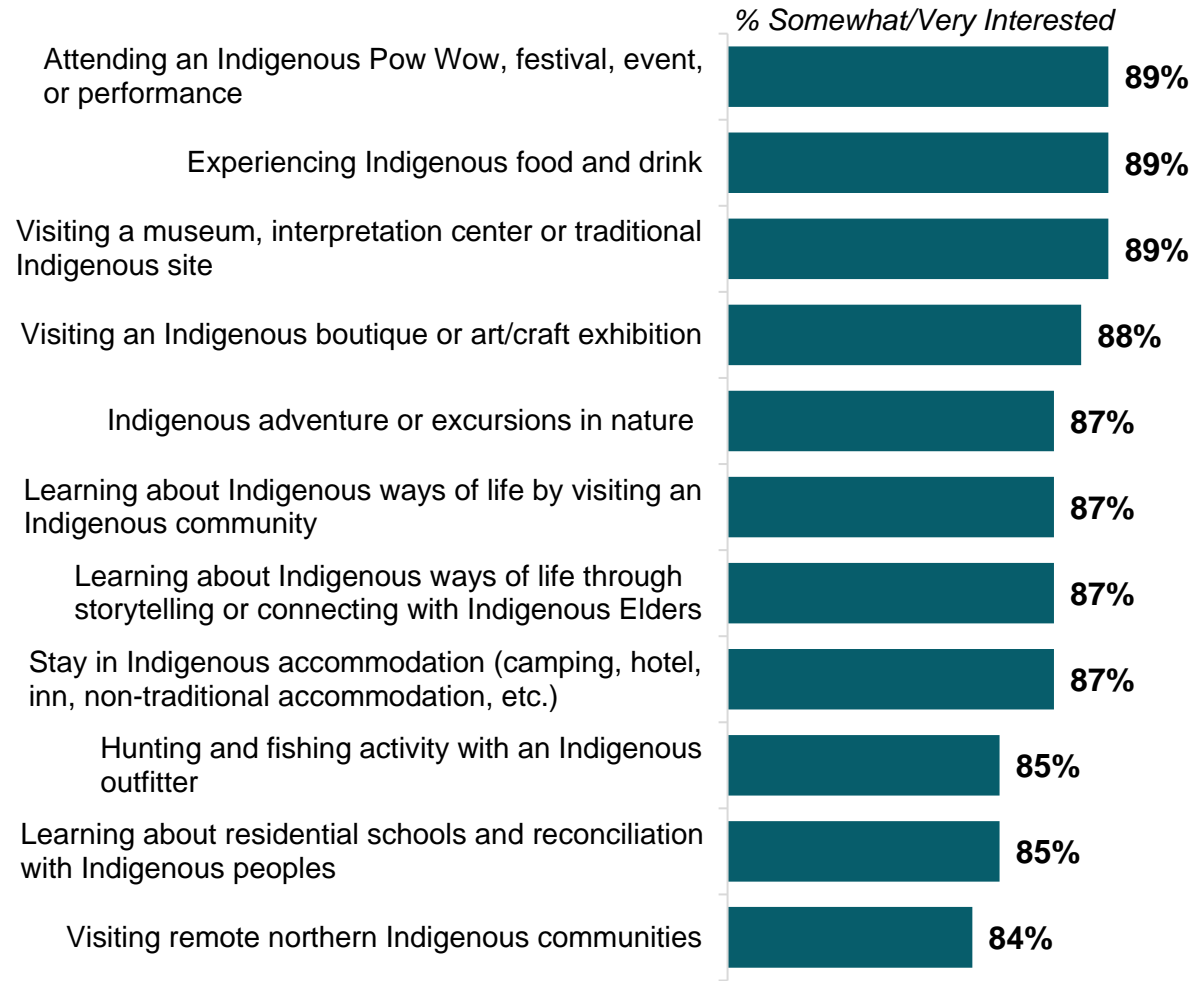


# INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential Chinese travellers to Canada demonstrate strong interest in Indigenous activities, the most popular are attending an Indigenous performance, trying Indigenous food, or visiting an Indigenous site.



Uclulet  
British Columbia



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1676)  
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 have participated in outdoor activities, such as nature walks and visiting oceanside or lakeside beaches.

**33%**

Nature Walks

**25%**

Snowshoeing or Cross-Country Skiing

**31%**

Oceanside Beaches

**25%**

Historical, Archaeological, or World Heritage Sites

**29%**

Lakeside Beaches

**24%**

Learning about Indigenous Culture, Traditions or History

**27%**

Trying Local Food and Drink

**24%**

Cultural or Traditional Festivals

**27%**

Natural Attractions

**24%**

Culinary Tours or Cooking Classes

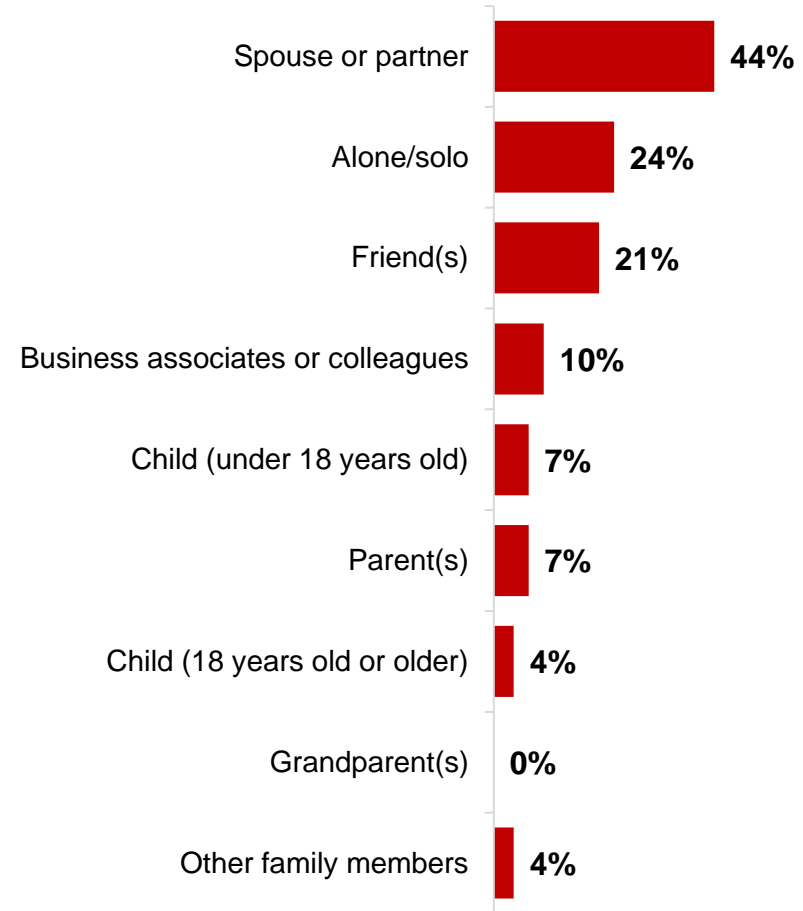
Base: Long-haul pleasure travellers (past 3 years or next 2 years). Travellers to Canada (n=621)  
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon  
Alberta

# TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years were most likely to visit with a spouse or partner. Solo trips and travelling with friends were also popular.

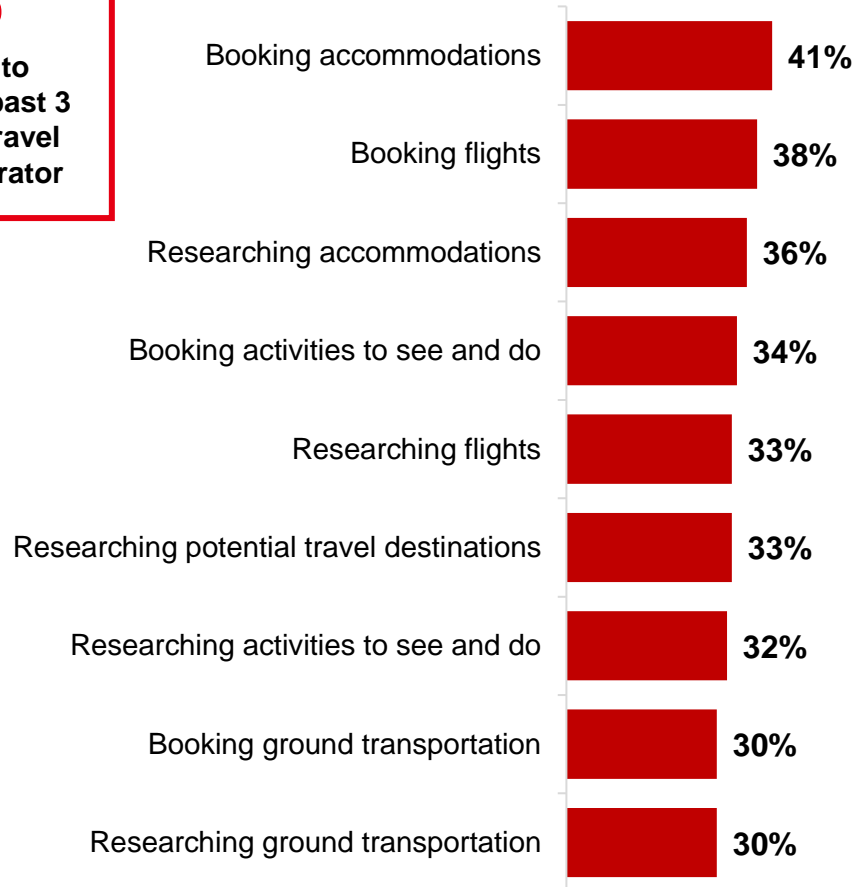


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=621)  
With whom did you travel on this trip? (Select all that apply)

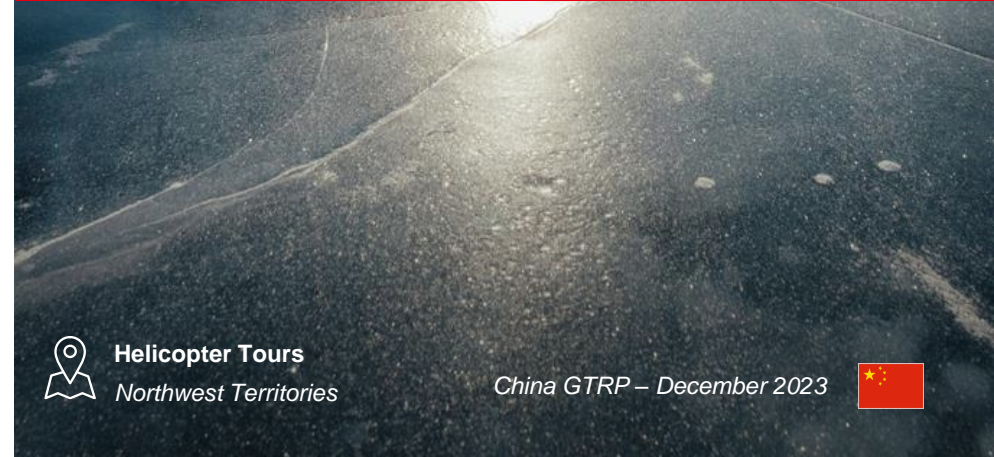


# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

**75%**  
of travellers to Canada in the past 3 years used a travel agent/tour operator



**Three out of four travellers to Canada in the past 3 years used a travel agent or tour operator, mostly for booking accommodations and flights.**



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

Three out of four travellers to Canada in the past 3 years had at least a portion of their trip be part of an organized group tour.

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

38%

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

38%

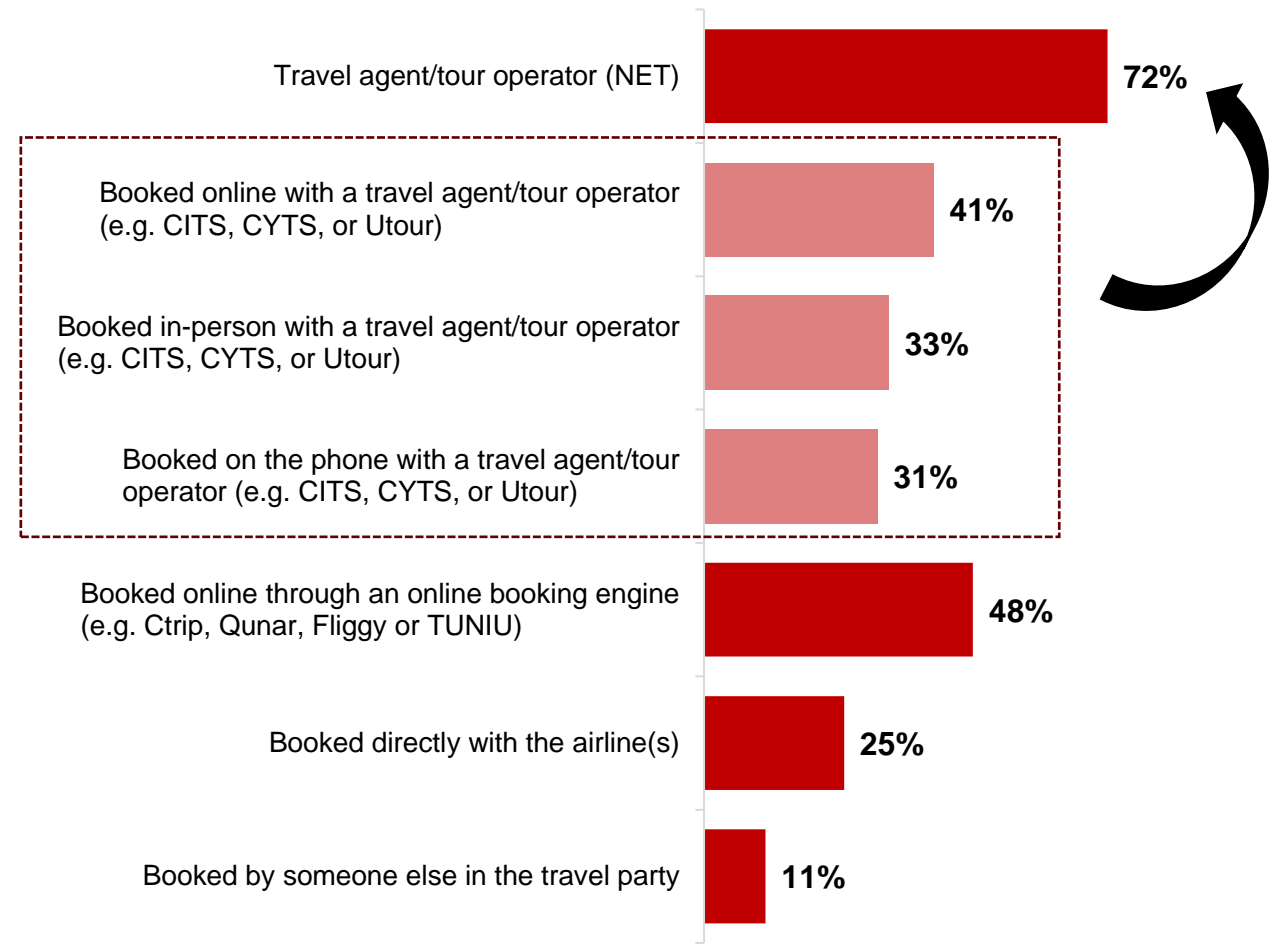
No

24%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=621)  
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?



# BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA



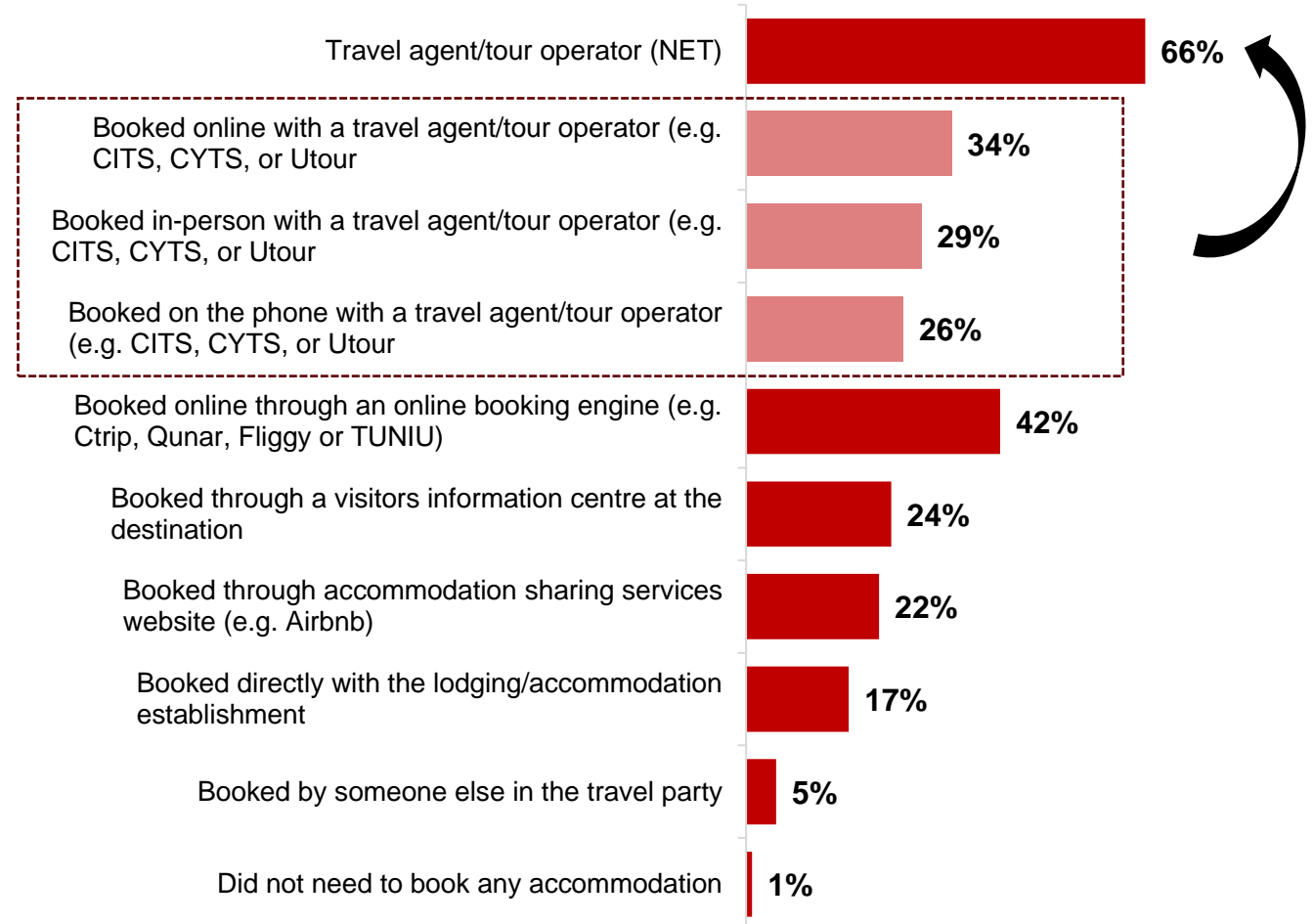
**Canada in the past 3 years were most likely to use a travel agent or tour operator to book flights, followed by booking online through a booking engine.**

27 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=621)  
How did you book your flight for this trip? (Select all that apply)

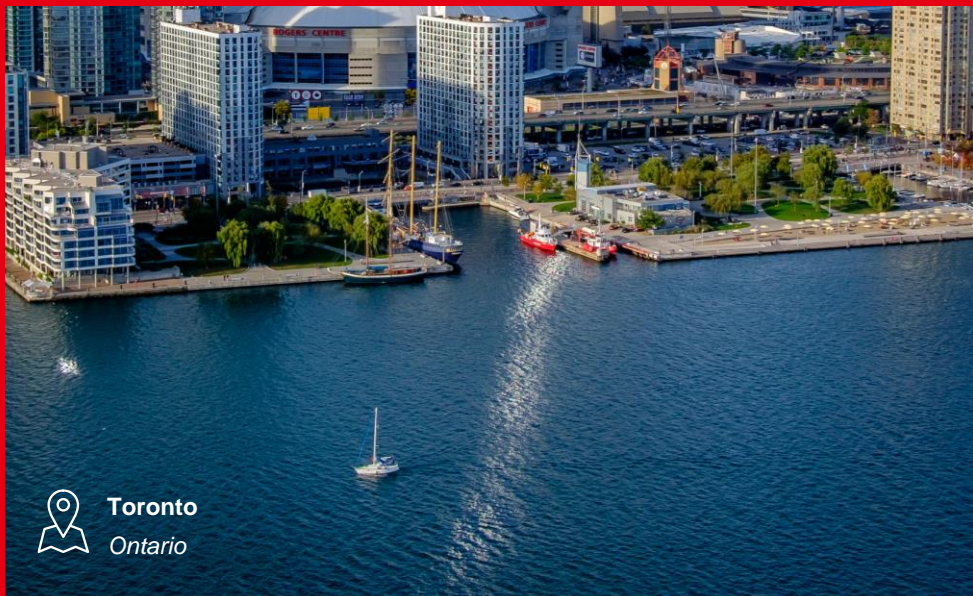


# BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

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

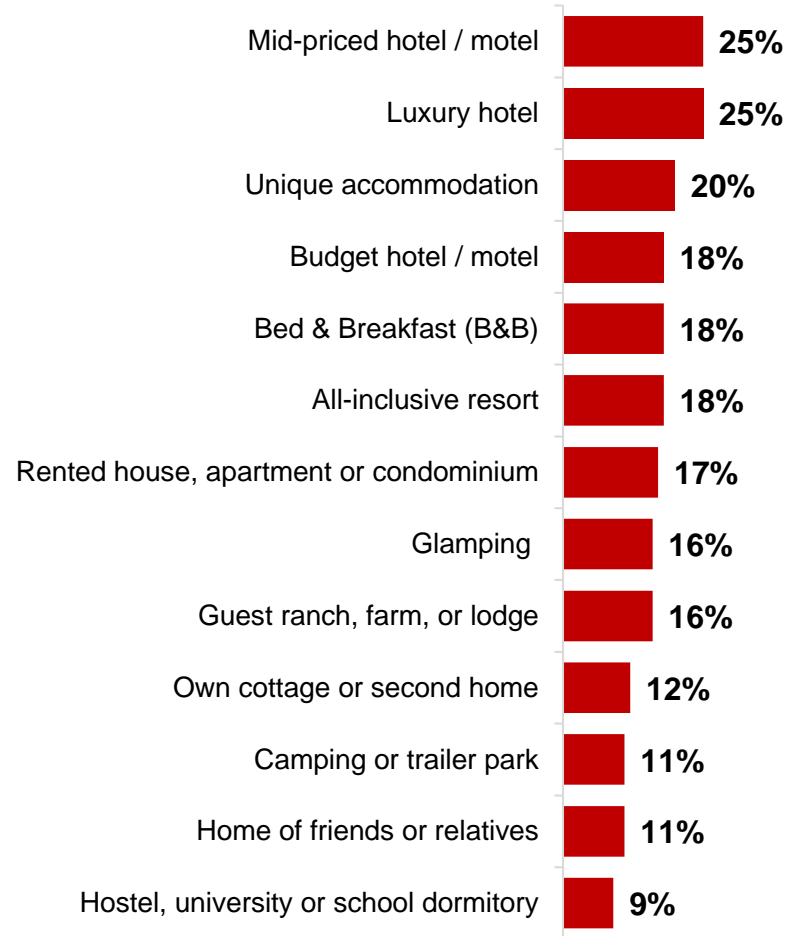


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=621)  
How did you book your accommodation for this trip? (Select all that apply)





# TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



29 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=616)

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



**Travellers to Canada in the past 3 years were most likely to stay in mid-priced or luxury hotels.**



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)



CANADIAN TOURISM DATA  
**collective**