

2021 Global Tourism Watch Highlights Report



Australia

Canada



Global Tourism Watch



DESTINATION
CANADA

Study Overview: Australia 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 accommodation in the past 3 years, or plan to take such a trip in the next 2 years.



Timing of Fieldwork



2021

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.



Geographical Definition for Qualified Trips

Outside of: Australia, New Zealand and the Pacific Islands



GTW Sample Distribution

Sample distribution: **National**

Recent visitors to Canada: **213**
 Other travellers: **1,287**
 Total sample size: **1,500**

Market Overview

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

COVID-19 situation in Australia

When the COVID-19 pandemic began in March 2020, Australia introduced some of the toughest travel restrictions in the world. Australia's "zero-COVID" strategy closed national and state borders, restricted citizens from leaving or returning, and imposed 14-day hotel quarantines on its few arrivals.¹ Melbourne spent more time under COVID-19 lockdowns than any other city in the world. Stay at home orders were finally lifted in Melbourne in October 2021 when the double-vaccination rate hit 70%.²

Outbound travel situation

In early October, Australia outlined its plans to lift the travel ban on its vaccinated citizens. Flights from Australia were to reopen to fully vaccinated Australians as of November 1. All returning citizens would have to provide a negative PCR test to enter the country. Quarantine requirements differed by state, with the national policy being a seven-day at home quarantine. Both New South Wales and Victoria announced that the mandatory quarantine requirement would be removed entirely for fully vaccinated international arrivals as of November 1, when New South Wales was set to achieve its vaccination target of 80%.³

Canada's borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.⁴

¹ *New York Times*, October 2021.

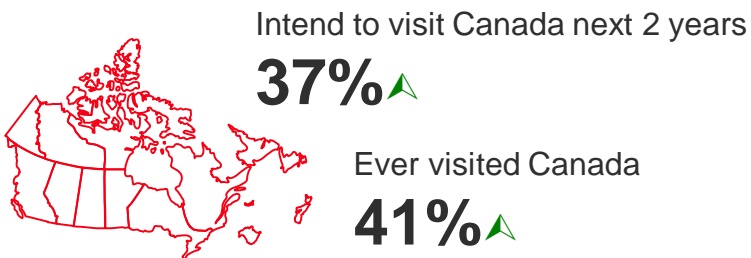
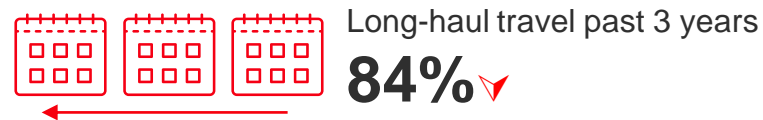
² *NBC News*, October 2021.

³ *Forbes*, October 2021.

⁴ *Government of Canada*, September 2021.

Travel Indicators

Australia is a mature market with high levels of long-haul travel and future travel intention.



↗ / ↘ Significantly higher/lower than 2020 GTW wave.

KEY HIGHLIGHTS

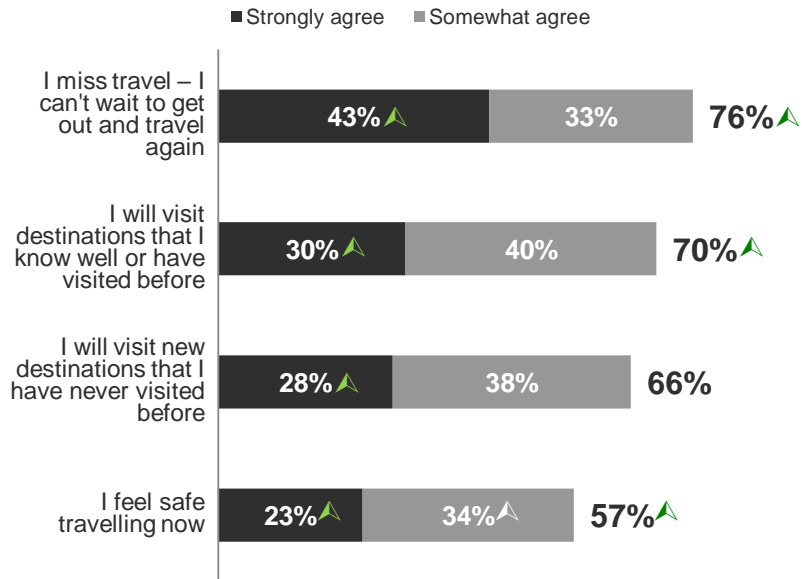
Insight	Implication
<p>With Australia's travel ban lifting in November 2021 after two years, Australian travellers are ready to travel again. Significantly more Australian travellers say they feel safe travelling now, but there is a slight preference for visiting familiar destinations over new ones.</p>	<p><i>There is an opportunity to capitalize on Australian travellers renewed interest in and ability to travel. Many destinations are competing for the Australian market, so finding ways to differentiate Canada is important. Attracting repeat visitors may present an additional opportunity.</i></p>
<p>Most COVID-19-related concerns are waning, though quarantine concerns (both at the destination and upon return to Australia) persist. Vaccination requirements are also a consideration for Australian travellers.</p>	<p><i>To attract potential visitors and differentiate Canada from competitors, it is important to communicate Canada's entry requirements for fully vaccinated travellers, including the lack of quarantine requirements.</i></p>
<p>While travel is the top spending priority for the next year, Australian travellers report that they are planning to spend less on long-haul travel post-COVID-19 than they did pre-COVID-19. However, despite planning to spend more on visiting closer destinations, Australian travellers' anticipated spending on long-haul travel is still more than double the anticipated spending on short-haul travel.</p>	<p><i>The current prioritization of spending on travel, along with the high anticipated spend on long-haul travel post-COVID-19, presents a strong opportunity for Canada.</i></p>
<p>Likelihood of visiting Canada in the next two years is on the rise, particularly among younger Australians. While cost is less of a deterrent for those younger travellers, they are also more likely to plan a shorter visit to Canada.</p>	<p><i>With comfort levels among older Australian travellers taking a little longer to rebound, there is a more immediate opportunity to promote Canada as a destination among younger travellers and to encourage them to stay longer.</i></p>
<p>Interest in several outdoor activities has dropped in general, but remains consistently high for a trip to Canada. In particular, interest in seeing the Northern lights is now tied as the top activity Australian travellers would base a trip around, and is one of the top activities of interest on a trip to Canada.</p>	<p><i>While outdoor activities are still popular for a trip to Canada, general interest in some activities is waning. Unique activities such as viewing the Northern lights on a trip to Canada may be a strong lure for Australian travellers.</i></p>
<p>For Australian travellers considering a visit to Canada, demand appears to be shifting away from the peak summer period and more towards early and late spring. In addition, spring is the preferred season for many vacation activities popular with Australian travellers. This presents an opportunity to potentially disperse Australian visitation into earlier in the year, given that demand outpaces historical visitation in early spring.</p>	<p><i>There is an opportunity to disperse Australian visitation earlier in the year by promoting activities popular in the spring months.</i></p>
<p>Travel agents and tour operators play a substantial role in supporting travel from Australia to Canada. The majority of potential Australia visitors indicate that they are likely to use a travel agent to research or book a trip to Canada.</p>	<p><i>Building and maintaining relationships with the Australian travel trade is important to boosting visitation to Canada.</i></p>

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

- ▶ Significantly more Australian travellers say they feel safe travelling now (57%, up from 35% in 2020), although older travellers (55+ years) remain more cautious. After two years of very limited travel, Australian travellers are eager to travel again, with a slight preference for visiting familiar destinations over new ones.
- ▶ As COVID-19 restrictions ease, Australian travellers are also growing more comfortable with using all forms of transportation, including both domestic and international air travel.

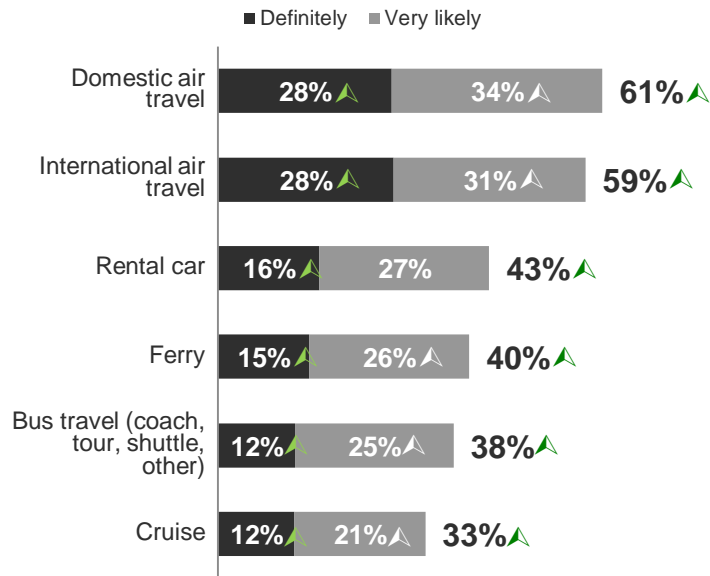
Attitudes Toward Travel



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements?

Transportation Modes

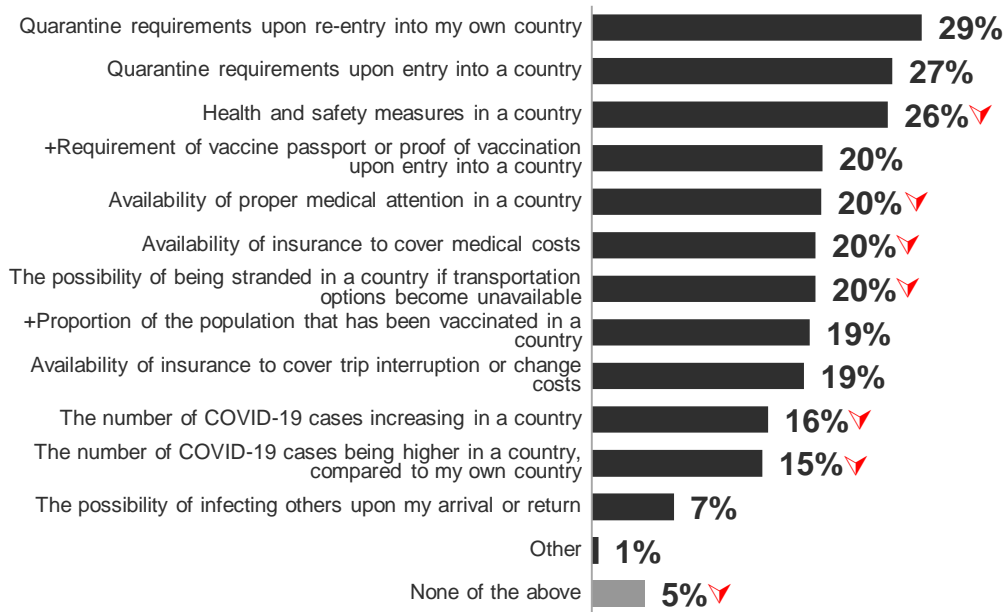


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

Most Important Considerations in Selecting Travel Destination

- ▶ When selecting a destination, quarantine requirements upon re-entry to Australia and at a destination remain the top concerns. Concerns related to health and safety measures, medical care, travel insurance, becoming stranded, and COVID-19 caseloads are generally subsiding. The requirement for proof of vaccination or vaccine passports is relatively high on Australian travellers' list of considerations when selecting a travel destination.
- ▶ In October 2021, there was a travel ban in place prohibiting Australians from both leaving and entering the country. The travel ban was set to lift in November 2021, at which point there would be no quarantine requirements for vaccinated travellers to enter Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

NEWQ3. When thinking about taking a holiday trip outside of your country, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

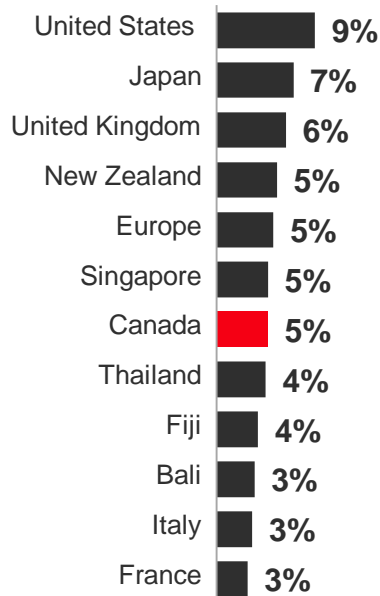
Key Performance Indicators

Unaided Long-Haul Destination Consideration (Next 2 Years)

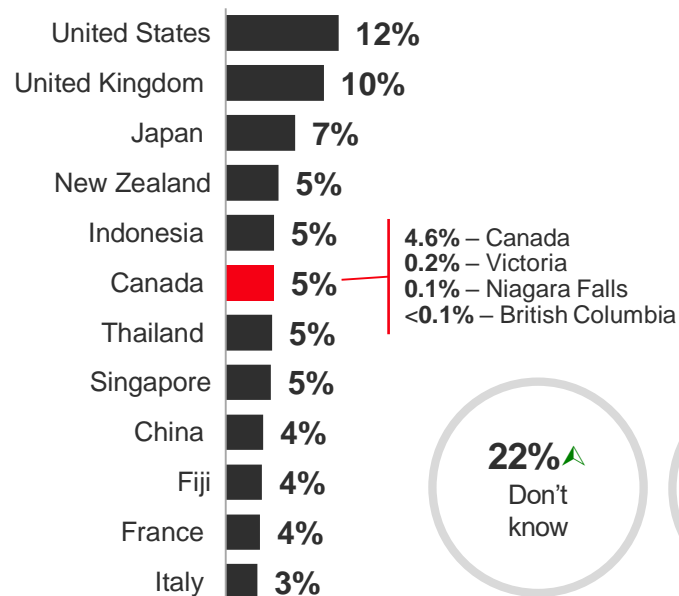
Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is in a 5-way tie with New Zealand, Indonesia, Thailand, and Singapore as the #4 top-of-mind country that Australian travellers are considering visiting in the next 2 years. Of note, 22% of Australian travellers were not able to name any destinations are under consideration, which is likely reflective of the uncertain state of international travel for Australians at the time of data collection.

Top 12 Destination Brands¹



Top 12 Destination Countries²



22%
Don't know

29%
Not planning to travel

¹ Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).

² Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

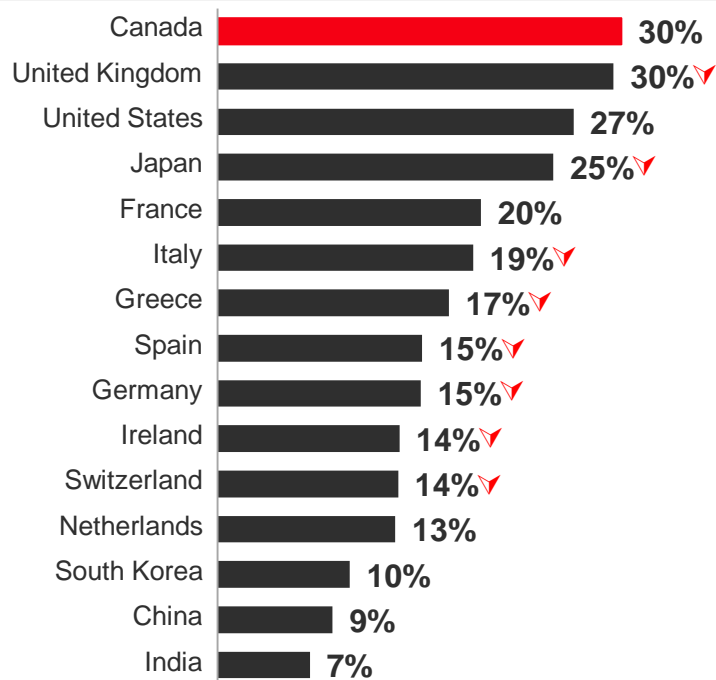
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S8. You mentioned that you are likely to take a long-haul holiday trip outside of Australia, New Zealand and the Pacific Islands in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

Aided Destination Consideration (Next 2 Years)

Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

- ▶ Canada is now tied for first with the UK on aided consideration, after the UK saw a significant decline in mentions compared to 2020. Many other competitive destinations also recorded significant declines on the aided consideration metric in 2021, possibly because of the uncertain state of international travel for Australians at the time of data collection.



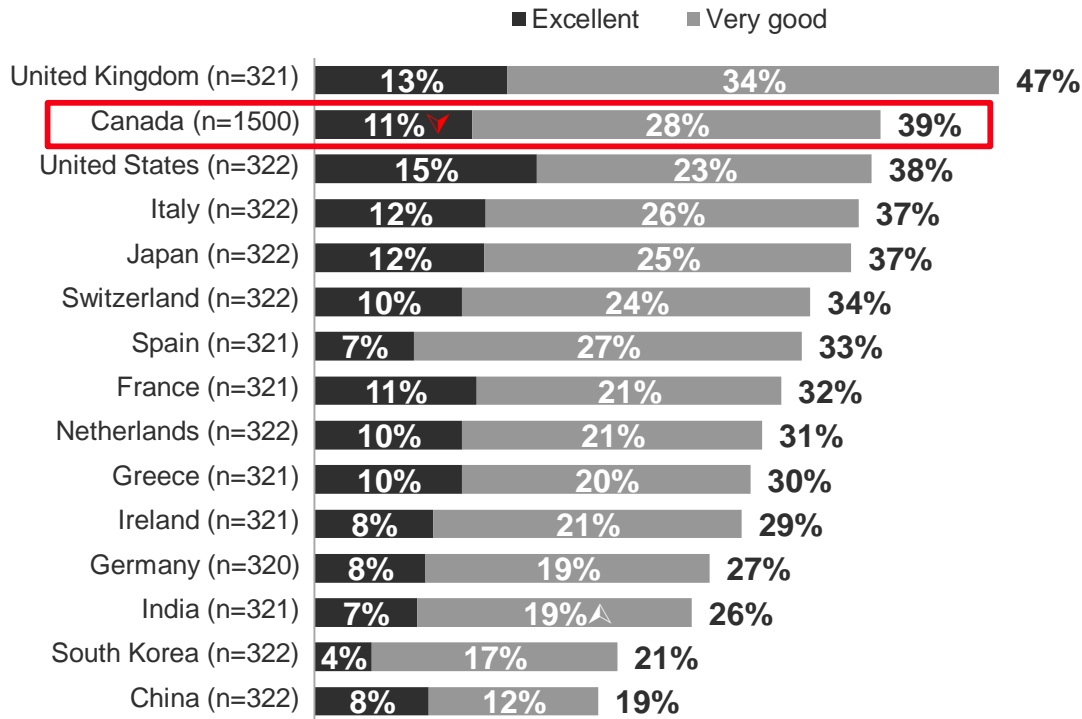
▲ ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

BVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years? (Select all that apply)

Knowledge of Holiday Opportunities

- Despite a significant drop in the proportion saying they have excellent knowledge of travel opportunities in the country, Canada ranks second on destination knowledge among long-haul competitors – slightly ahead of the United States, but trailing the United Kingdom by a considerable margin.



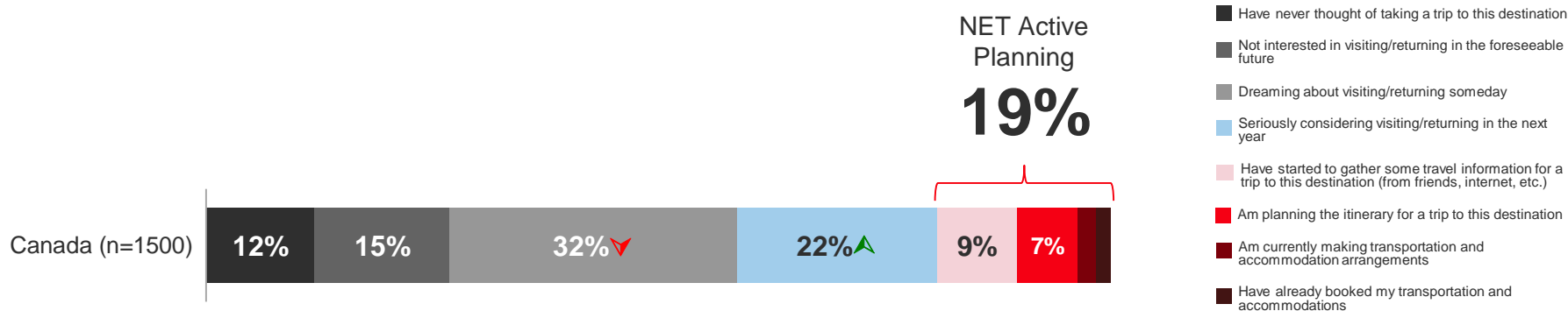
▲ / ✓ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

Stage in the Purchase Cycle by Market

There is a purchasing or decision-making cycle associated with long-haul travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. **NET Active Planning** represents the final four stages, or lower funnel, of this path-to-purchase cycle.

- ▶ Between 12% and 26% of Australian travellers are in the lower funnel stages of the purchase cycle for Canada's top competitor long-haul destinations. Canada is ranked 7th overall, tied with three other destinations, with 19% of Australian travellers in the NET active planning stages for a trip to Canada. This suggests that several long-haul destinations are under serious consideration by Australian travellers and Canada may face a challenge converting interested travellers into visitors.
- ▶ Compared to 2020, more Australian travellers say they are seriously considering visiting Canada in the next 2 years, while fewer say that they are dreaming about visiting, which suggests that Canada has seen some success in the past year in moving prospective visitors from the dreaming stage to the consideration phase.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

NET Promoter Score (NPS)

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited the destination and data has been normalized to indicate relative NPS scores across all competitors.

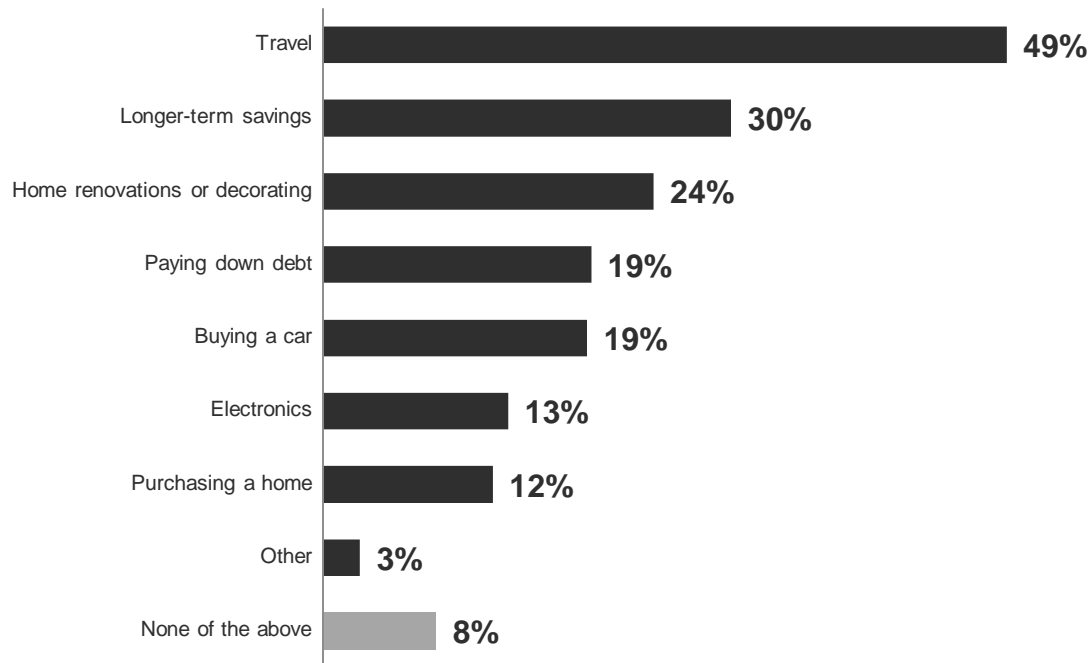
- ▶ Compared to competitive destinations, Canada is ranked 1st overall on NPS. Canada maintained the top spot in 2021 despite a significant drop in overall NPS score compared to 2020, as many competitors also saw a similar decline in NPS scores.



Travel Spending and Canada Travel Intent

Spending Priorities for the Next Year⁺

- ▶ Travel is the top immediate spending priority for Australian travellers in 2021, far ahead of secondary priorities such as savings and home renovations.



⁺ New question in 2021 GTW – no trending.

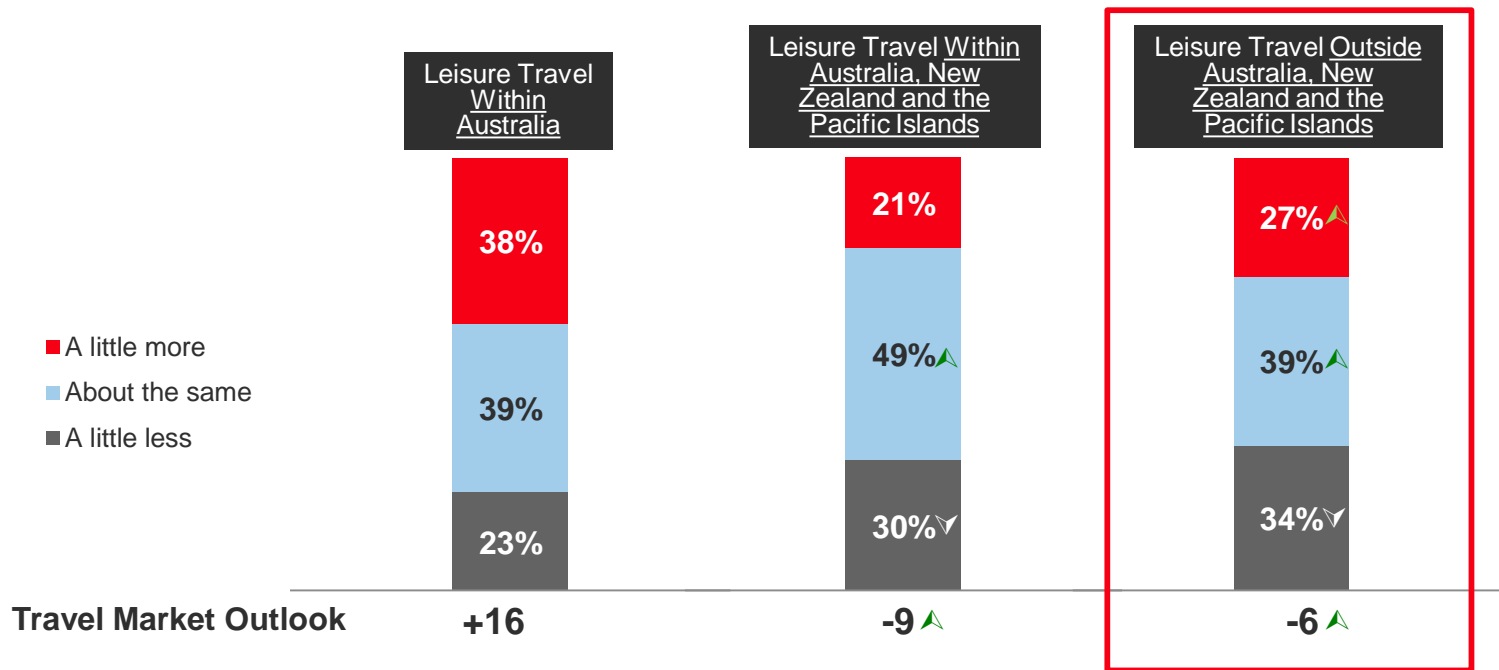
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

Travel Spending Intentions (in Next 12 Months)

Travel Market Outlook is the difference between the proportion who say they will spend more on travel in the next 12 months than they did in the last 12 months, minus the proportion who say will spend less on travel in the next 12 months than in the last 12 months.

- ▶ Australian travellers foresee spending more on short-haul and long-haul travel in the next year, though the outlook is still most positive for domestic travel.
- ▶ While the short- and long-haul travel outlooks are still negative, they are both significantly improved from 2020 (up from -15 and -31, respectively).



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S2. 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 ...?

Travel Spending⁺

- ▶ For domestic travel and travel to short-haul destinations (within Australia, New Zealand, and the Pacific Islands), Australian travellers anticipate spending more post-COVID-19 than they did pre-COVID-19.
- ▶ Although the outlook for spending on long-haul travel has improved compared to 2020, Australian travellers still anticipate spending less on long-haul travel post-COVID-19 than they did prior to COVID-19. However, anticipated spending on long-haul travel (\$9,689) is still more than double the anticipated spending on short-haul travel (\$4,021).

Mean Annual Household Spend on Vacation Trips

PRE-COVID	POST-COVID	NET CHANGE	
		POST-COVID MINUS PRE-COVID	
Travelling within Australia			
\$2,729	\$2,958	+\$229	(+8%)
Travelling within Australia, New Zealand and the Pacific Islands			
\$3,496	\$4,021	+\$525	(+15%)
Travelling outside Australia, New Zealand and the Pacific Islands			
\$10,742	\$9,689	-\$1053	(-10%)

+ New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=445 Domestic / n=229 Short-haul / n=368 Long-haul)

TP2_INT. Thinking about the holiday trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

Base: Long-haul pleasure travellers who expect to travel post-COVID-19 (n=480 Domestic / n=285 Short-haul / n=369 Long-haul)

TP2B_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

Likelihood of Visiting Canada in Next 2 Years

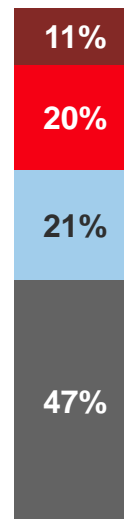
- ▶ Among all Australian travellers, the likelihood of visiting Canada in the next two years is up significantly from 2020.
- ▶ Intent to visit Canada in the next two years is highest among those under 55 years.
- ▶ While Australian travellers are more likely to be considering a trip to Canada of 4+ nights than a trip of 1-3 nights, interest in shorter duration trips to Canada is on the rise, particularly among those under 55 years.

Likelihood of Taking a Trip of:

1 to 3 nights

4+ nights

- Definitely
- Very likely
- Somewhat likely
- Not interested



37%

Likely
(definitely/very
likely) to visit
Canada in next
2 years

Significantly higher/lower than 2020 GTW wave.

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=1500)

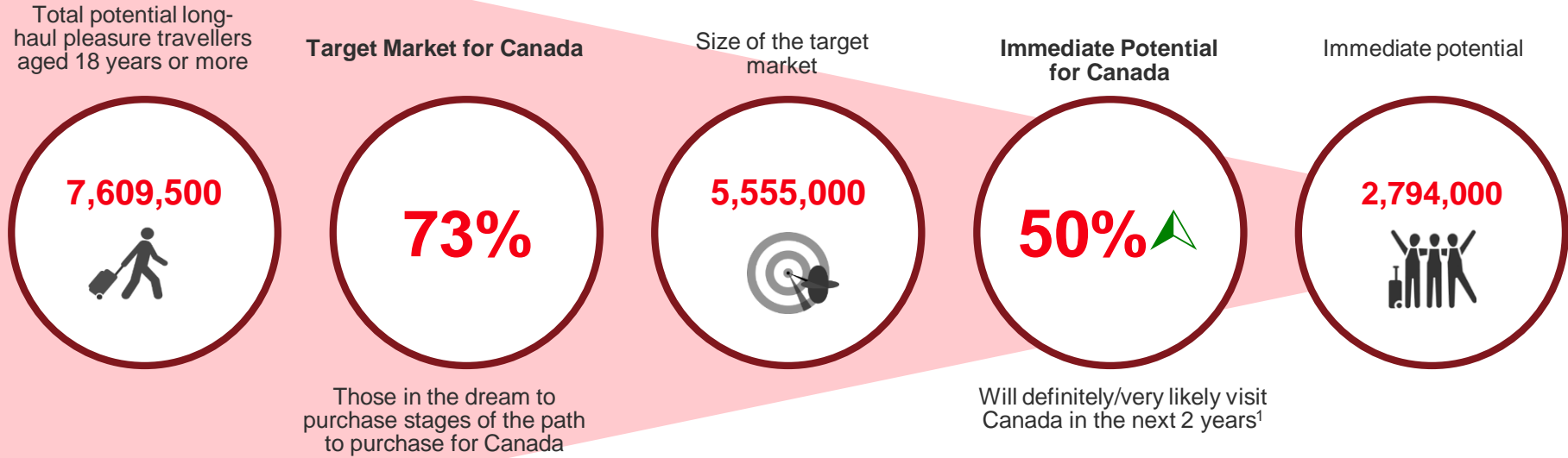
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size For Canada

Study data is used to estimate the size of the potential market for Canada in two ways – the target market (proportion of all Australian travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

- ▶ The proportion of Australian travellers considering Canada remained stable in 2021, but within that group the intention to visit Canada in the next two years increased significantly, resulting in an immediate potential market size of 2.79 million.

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



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1109)
 MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
 MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

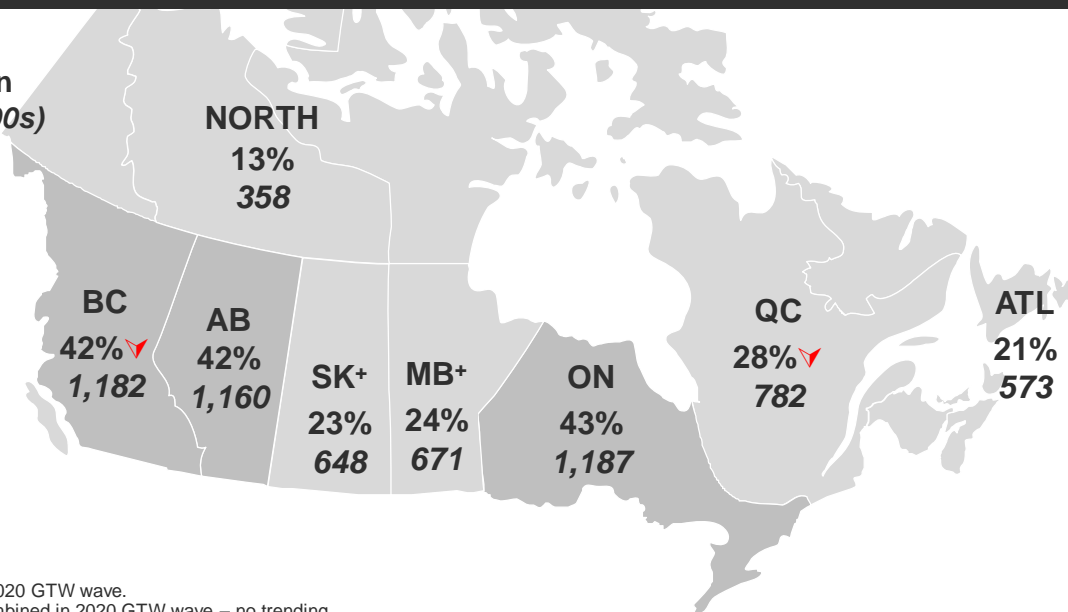


Potential Market Size for the Regions

- ▶ Ontario, BC, and Alberta continue to stand out as the provinces most likely to attract the largest share of Australian travellers, although interest in visiting BC is down compared to 2020. Interest in visiting Quebec has also decreased since 2020.

Immediate Potential for Canada: **2,794,000**

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



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

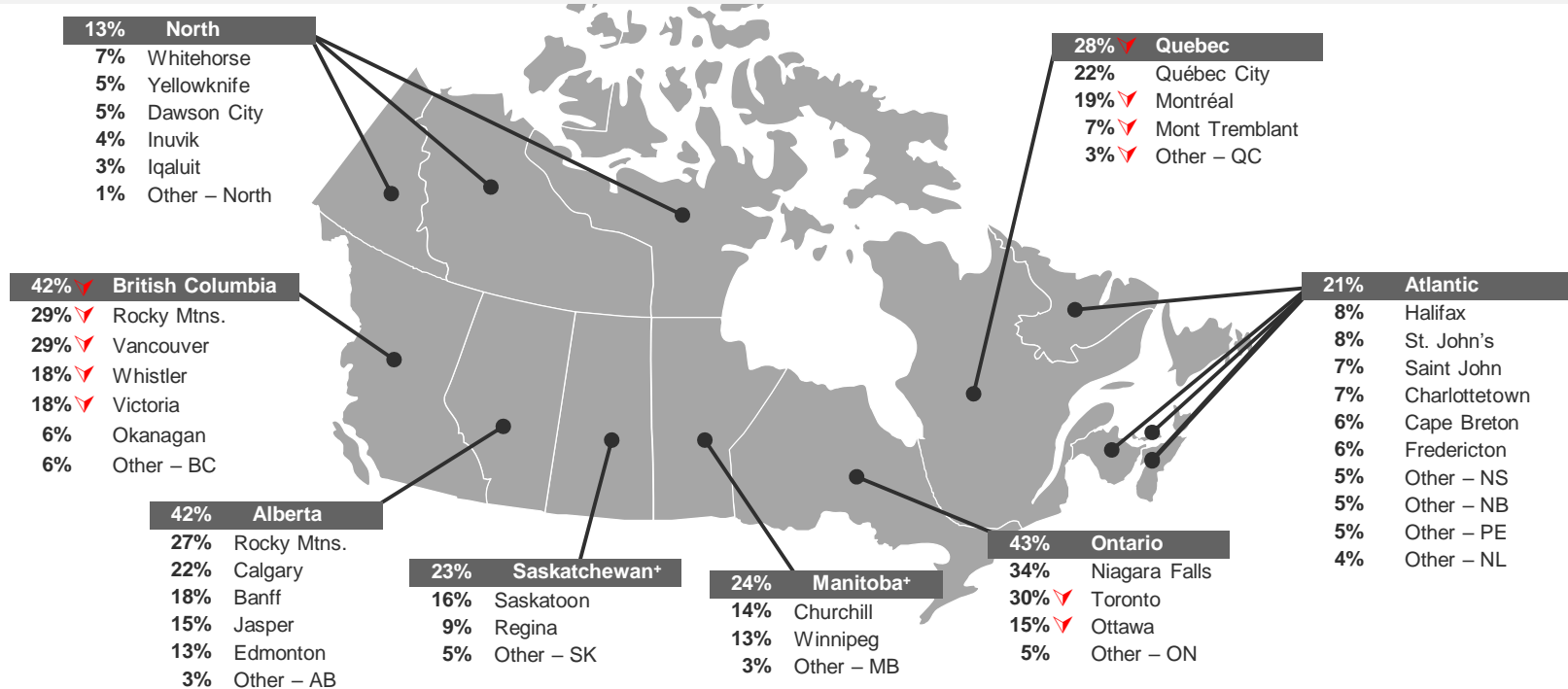
+ Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

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=546)

MP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

Canadian Destinations Likely to Visit

- The declining interest in BC is fueled by declining interest in the province's top destinations, including the Rocky Mountains, Vancouver, Victoria, and Whistler. Although interest in visiting Ontario overall is similar to 2020, interest in Toronto and Ottawa is down. Meanwhile, waning interest in Quebec is fueled by lower interest in Montréal and Mont Tremblant.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

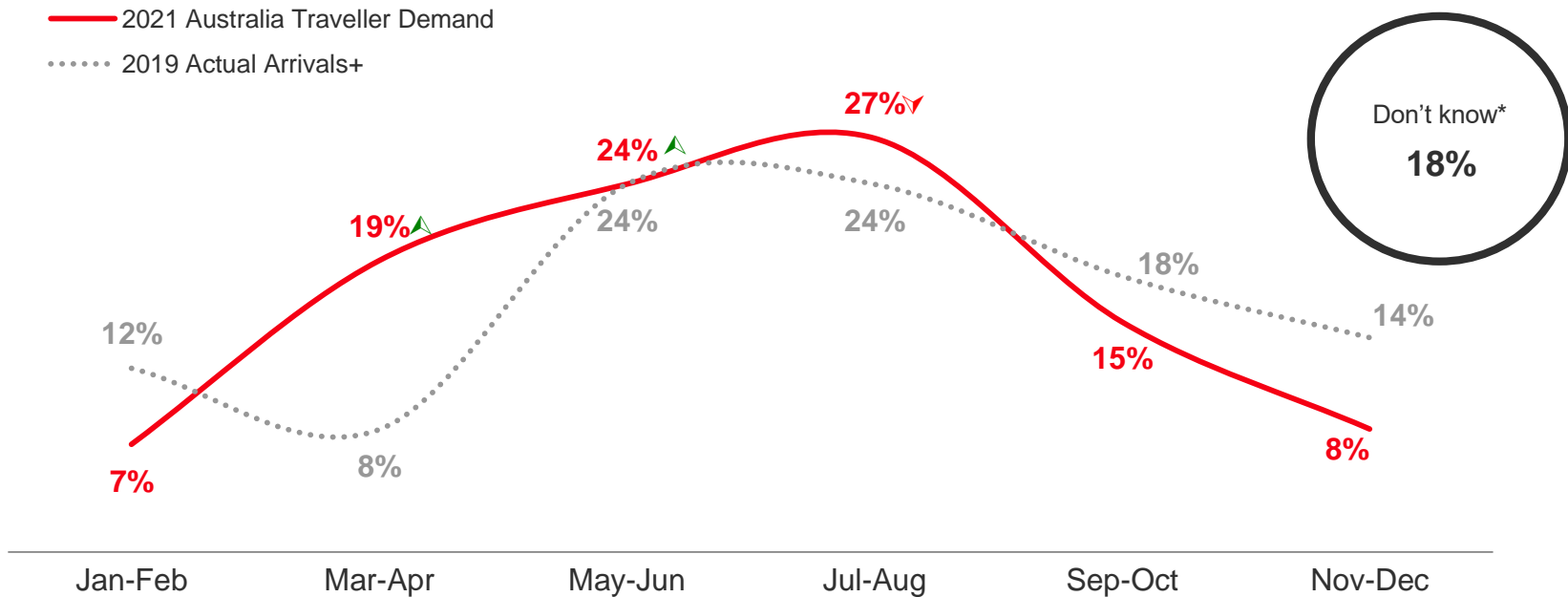
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=546)

MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

MP7a-i. Within [province/region], which travel destinations are you likely to visit? (Select all that apply)

Australia Seasonal Demand for Canada

- ▶ July and August remain the most popular months for Australian travellers considering a visit to Canada, and are also historically among the peak months (along with May and June) for visitor arrivals from Australia.
- ▶ However, demand appears to be shifting away from the peak summer period and more towards early spring (March-April) and late spring (May-June). This presents an opportunity to potentially to disperse Australian visitation into earlier in the year, given that demand outpaces historical visitation in early spring.



+ Source: 2019 Statistics Canada Frontier Border Counts.
* 'Don't know' responses excluded from seasonal demand chart.

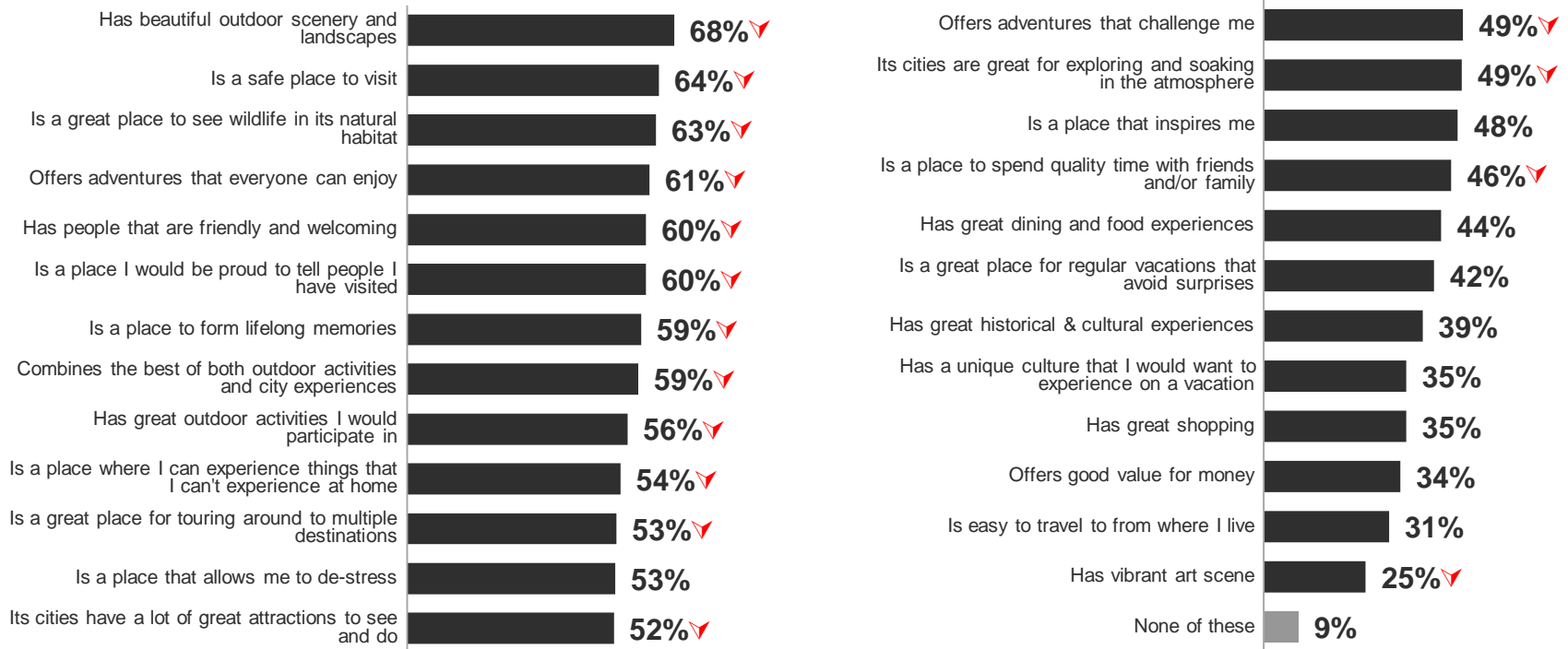
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=926)
PC3. What time of year would you consider taking a holiday trip to Canada in the next 2 years? (Select all that apply)

Impressions of Canada

Impressions of Canada as a Holiday Destination

▶ Canada is best known among Australian travellers for beautiful scenery and landscapes, being a safe destination, and being a great place to see wildlife. However, the proportion of Australian travellers associating Canada with these top attributes, as well as several other top attributes, declined in 2021.



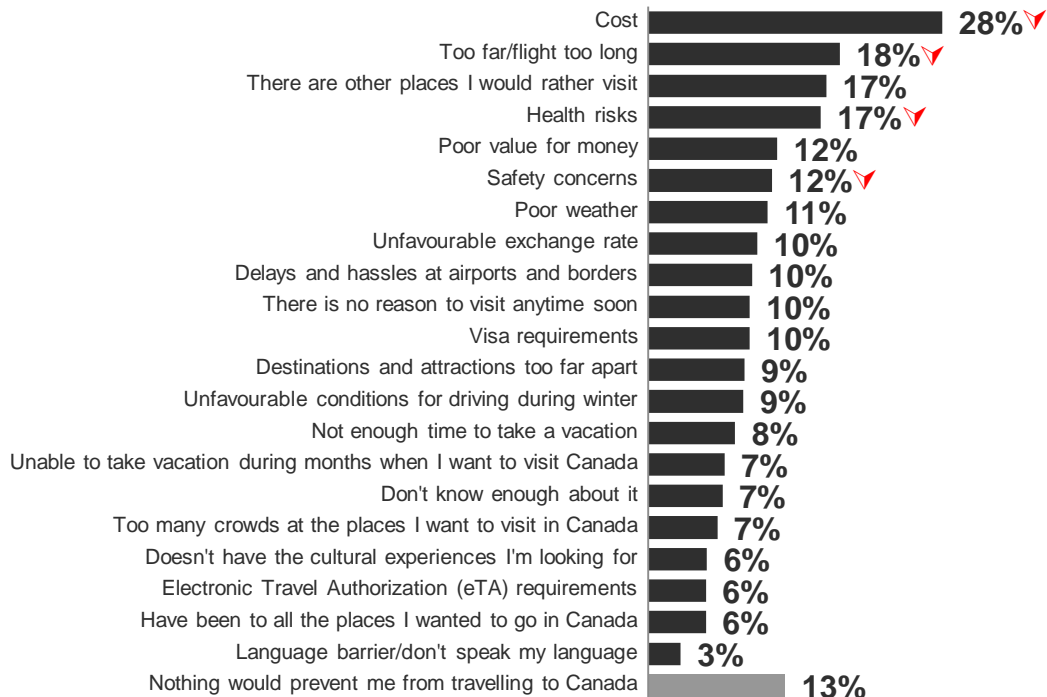
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP5_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destination you think apply to the statement. Select None of these if you think none of the destinations apply.

Key Barriers for Visiting Canada

- While cost concerns and travel distance continue to stand out as the top deterrents for potential Australian travellers to visit Canada, both have declined in 2021, and are significantly more of a deterrent for those aged 55+ years. As COVID-19 vaccines became more widely globally available in 2021, health risks and safety concerns have also declined in importance.



Significantly higher/lower than 2020 GTW wave.

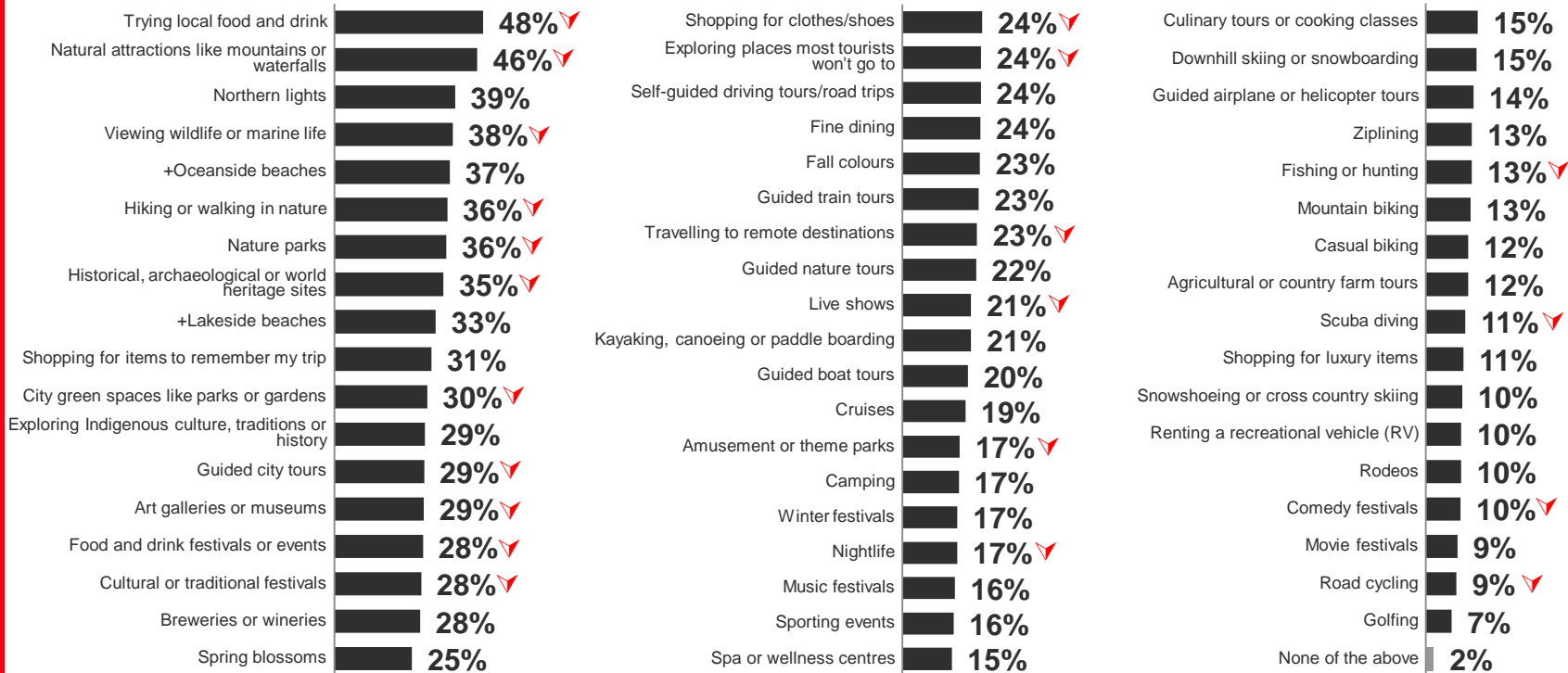
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

Vacation Interests

Activities Interested in While on Holiday

- ▶ Along with trying local food and drink, Australian travellers have a strong preference for nature-based holiday activities.
- ▶ General interest in a wide variety of vacation activities, including both nature and city-based activities, has decreased compared to 2020.



+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Activities to Base an Entire Trip Around

- ▶ Seeing the Northern lights is tied as the top activity that Australian travellers would base a trip around, which presents a key opportunity for Canada. Natural attractions like mountains and waterfalls are the other top trip anchor, although interest is down compared to 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1471)

MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

Time of Year Would Participate in Activities While on Holiday*

- Spring is the preferred season to take part in most listed vacation activities, followed closely by summer. Other activities such as hiking and visiting historical sites, hold three season appeal. There are also several activities, especially city-oriented activities, which are popular year-round.


	Summer	Fall	Winter	Spring
Trying local food and drink	66%	49%	42%	75%
Natural attractions like mountains or waterfalls	46%	35%	17%	72%
Northern lights	24%	21%	62%	32%
Viewing wildlife or marine life	58%	34%	18%	74%
+ Oceanside beaches	82%	15%	5%	44%
Hiking or walking in nature	51%	41%	15%	78%
Nature parks	50%	39%	16%	78%
Historical, archaeological or world heritage sites	53%	40%	25%	74%
+ Lakeside beaches	71%	20%	14%	49%
Shopping for items to remember my trip	57%	43%	39%	72%
City green spaces like parks or gardens	52%	39%	17%	78%
Exploring Indigenous culture, traditions or history	61%	45%	35%	75%
Guided city tours	54%	38%	23%	76%
Art galleries or museums	54%	45%	45%	75%
Food and drink festivals or events	63%	36%	24%	66%
Cultural or traditional festivals	58%	41%	28%	74%
Breweries or wineries	62%	41%	31%	71%
Spring blossoms	n/a	n/a	n/a	100%

	Summer	Fall	Winter	Spring
Shopping for clothes/shoes	56%	39%	37%	64%
Exploring places most tourists won't go to	45%	34%	26%	69%
Self-guided driving tours/road trips	49%	34%	16%	76%
Fine dining	55%	45%	44%	70%
Fall colours	n/a	100%	n/a	n/a
Guided train tours	43%	42%	36%	67%
Travelling to remote destinations	51%	36%	21%	67%
Guided nature tours	42%	33%	22%	70%
Live shows	54%	36%	40%	67%
Kayaking, canoeing or paddle boarding	60%	23%	14%	61%
Guided boat tours	57%	25%	19%	62%
Cruises	54%	24%	17%	61%
Amusement or theme parks	55%	30%	16%	72%
Camping	55%	22%	14%	67%
Winter festivals	n/a	n/a	100%	n/a
Nightlife	66%	30%	29%	62%
Music festivals	47%	23%	23%	70%
Sporting events	54%	36%	37%	62%

	Summer	Fall	Winter	Spring
Spa or wellness centres	44%	40%	42%	59%
Culinary tours or cooking classes	49%	47%	38%	71%
Downhill skiing or snowboarding	n/a	n/a	100%	n/a
Guided airplane or helicopter tours	47%	31%	26%	65%
Ziplining	62%	31%	18%	67%
Fishing or hunting	57%	32%	26%	61%
Mountain biking	46%	21%	18%	63%
Casual biking	47%	31%	14%	64%
Agricultural or country farm tours	39%	21%	25%	67%
Scuba diving	66%	14%	17%	39%
Shopping for luxury items	52%	43%	42%	66%
Snowshoeing or cross country skiing	n/a	n/a	100%	n/a
Renting a recreational vehicle (RV)	62%	31%	30%	69%
Rodeos	48%	29%	26%	63%
Comedy festivals	51%	39%	41%	65%
Movie festivals	51%	36%	37%	61%
Road cycling	40%	25%	21%	62%
Golfing	52%	23%	17%	62%

* New question in 2021 GTW – no trending.

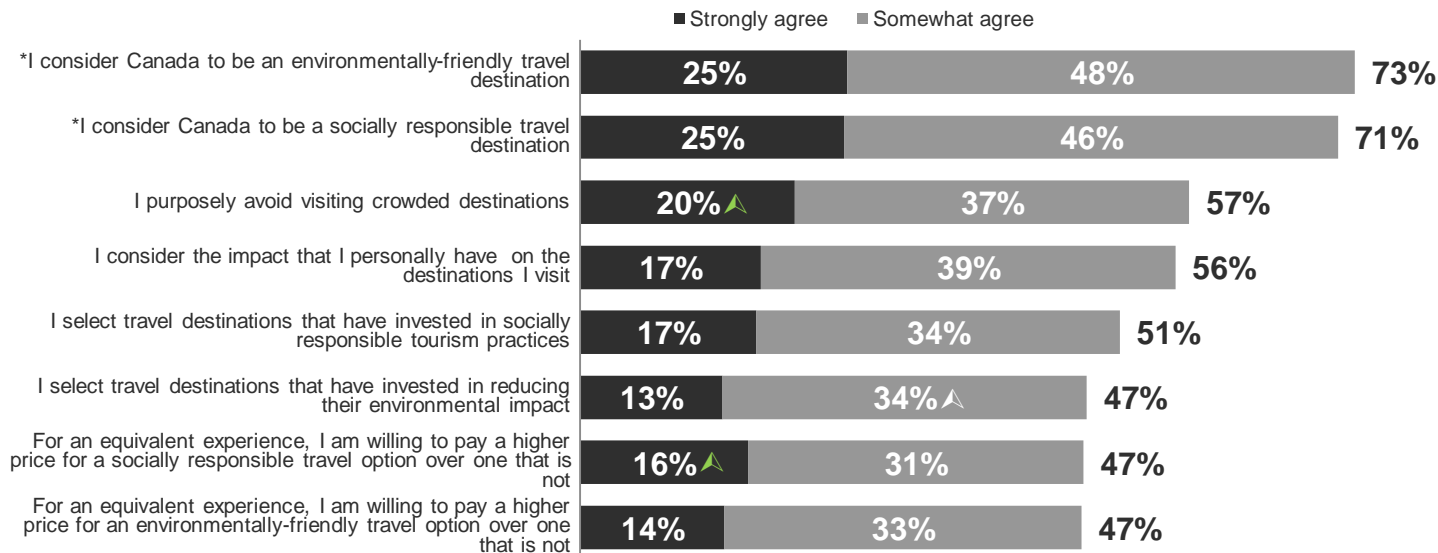
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.

 >50% of respondents who are interested in the activity would participate in this season

 40-49% of respondents who are interested in the activity would participate in this season

Sustainable Travel

- ▶ More than half of Australian travellers say they are thinking about the personal impact of their travel on destinations, and just under half say they would pay more for environmentally and socially responsible options.
- ▶ A majority of those interested in taking a trip to Canada consider it to be an environmentally-friendly and socially responsible travel destination.
- ▶ However, a much smaller number mention the availability of socially responsible (16%) or eco-friendly (13%) travel options as factors influencing their choice of Canada as a travel destination.¹



▲ ▼ Significantly higher/lower than 2020 GTW wave.

¹ Data can be found on page 32.

* Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=1109)

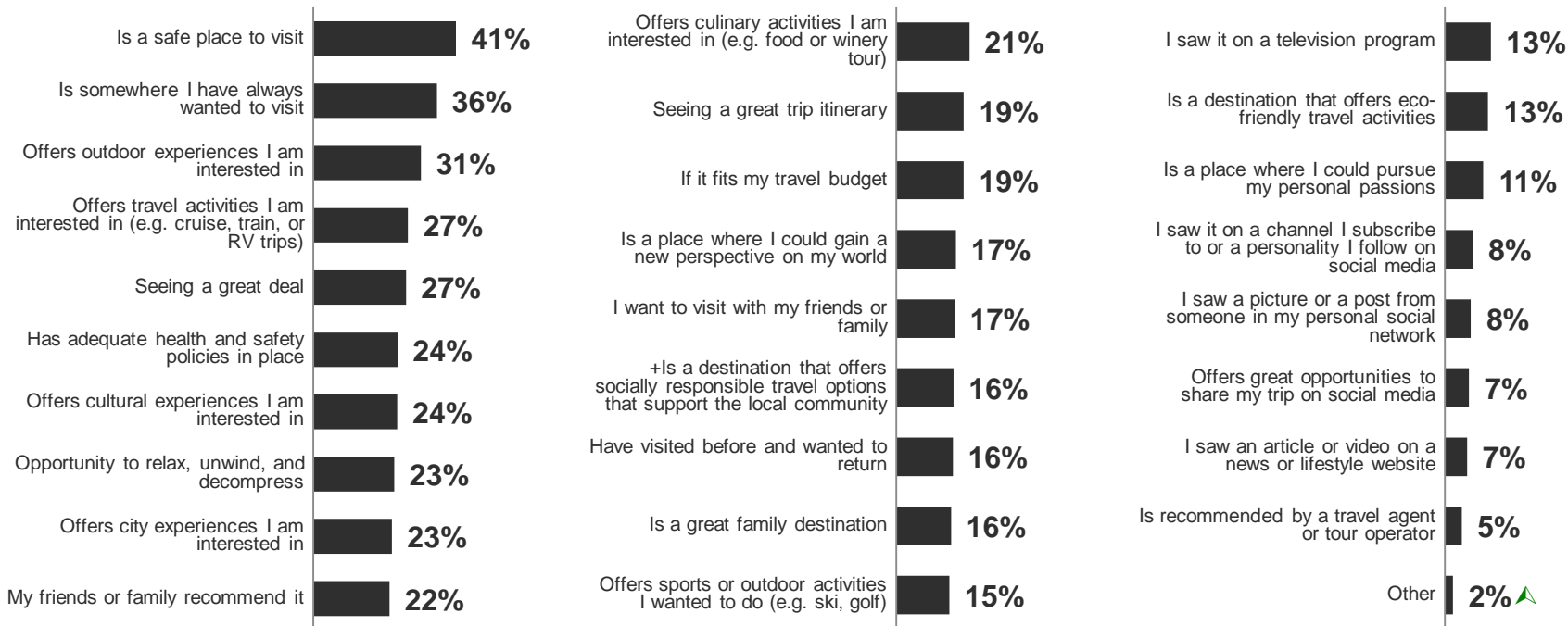
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

PC31. Sustainable travel refers to "travel that minimises any negative impact 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". Please indicate your level of agreement with each of the following statements ...

Key Characteristics of Future Trips to Canada

Factors Influencing Destination Choice

- The top factors that influence Australian travellers to choose Canada as a holiday destination continue to be destination safety, a longstanding desire to visit, and the availability of interesting outdoor experiences.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

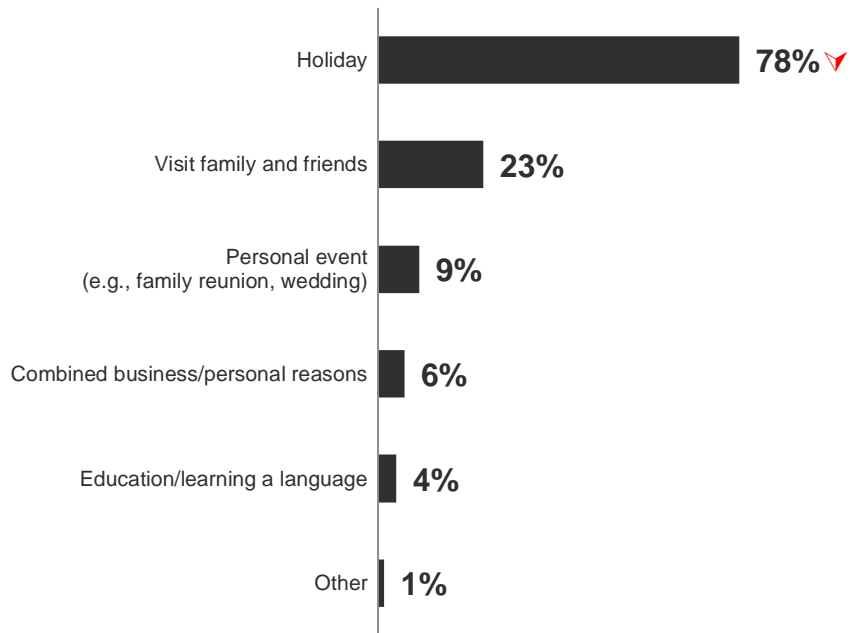
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286)

FT3. Which of the following would factor into your choice to travel to Canada? (Select all that apply)

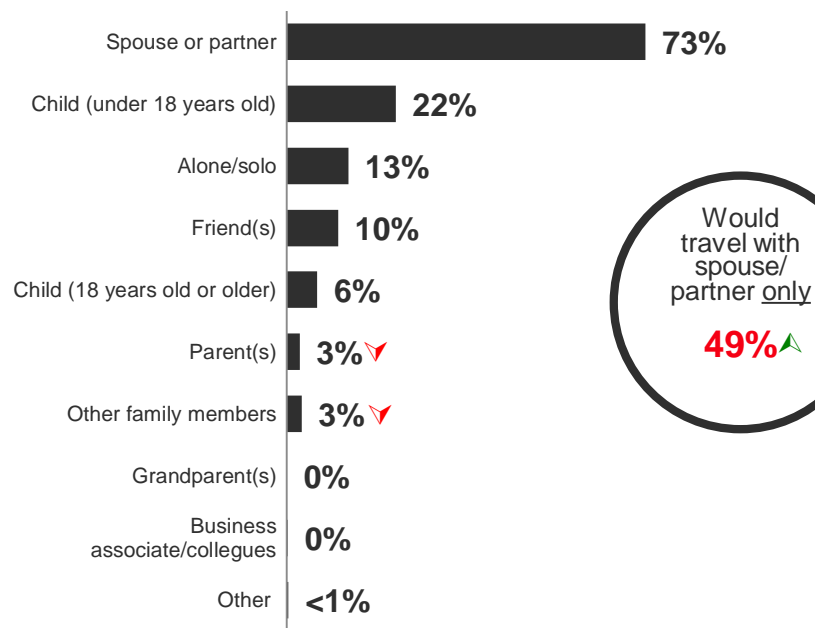
Main Purpose and Travel Party of Future Trip

- ▶ Holiday trips will drive Australian travel to Canada over the next 2 years, despite a decline since 2020, with VFR travel (trips to visit friends and relatives) playing a smaller role.
- ▶ Australian travel parties visiting Canada will be largely made up of immediate family – primarily couples or family trips with children. Intentions to travel as a couple with only a spouse or partner are on the rise.

Purpose of Trip



Travel Party



Would travel with spouse/partner only

49% ▲

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

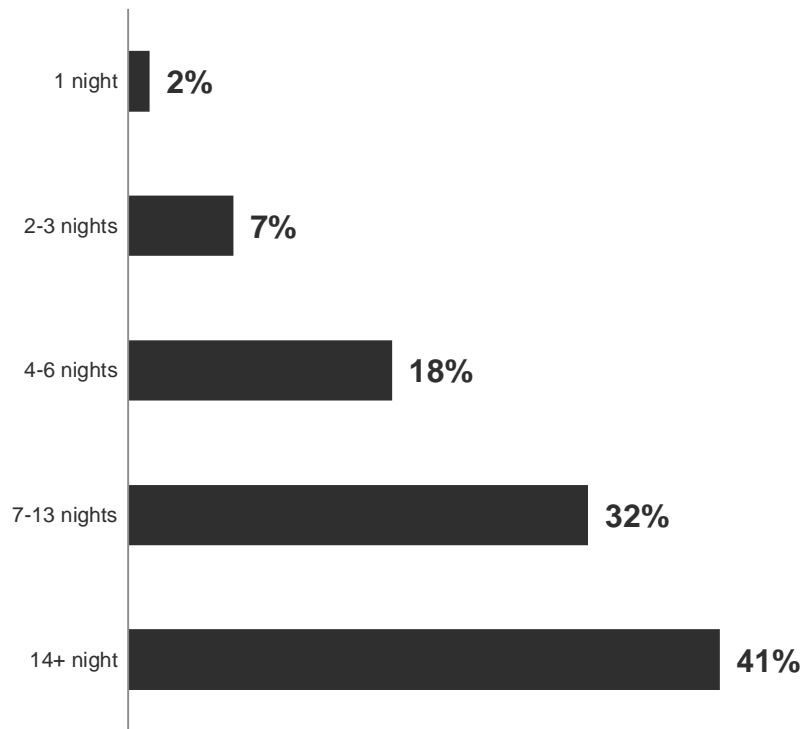
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286) FT2. If you took a trip to Canada, what would be the main purpose of this trip?

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286) FT5. Who would you travel with on a trip to Canada? (Select all that apply)

Length of Future Trip

- ▶ Australian travellers typically would like to spend at least one week in Canada, with the strongest preference for a trip of two weeks or longer. Those aged 55+ are the most likely to want to spend at least two weeks in Canada, while 18-34 year olds are more inclined to plan a shorter visit of 4-6 nights.



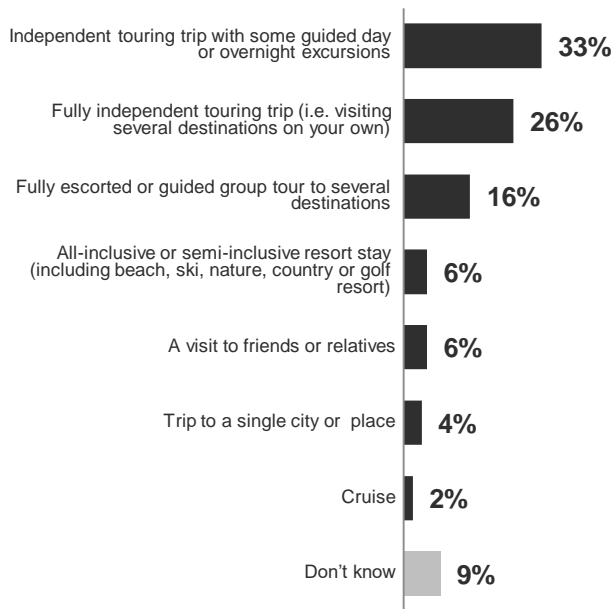
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286)
FT4. How many nights do you think you would spend on a trip to Canada?

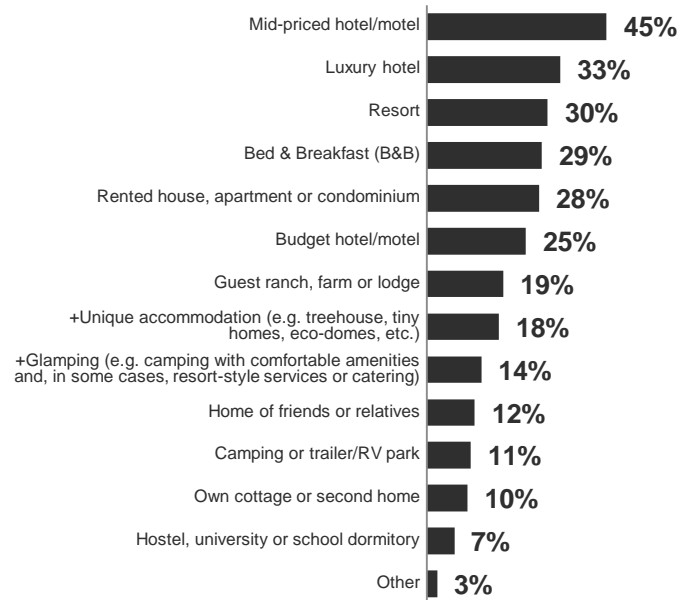
Trip Type and Accommodation for Future Trip

- ▶ Most Australian travellers would prefer to travel independently on a trip to Canada, either with or without the addition of some guided excursions as part of the trip.
- ▶ Mid-priced hotels continue to stand out as the most preferred type of accommodation for a trip to Canada, followed by luxury hotels.

Trip Type



Type of Accommodation



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

35

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286)
FT9. What type of trip do you think you would be most likely to book for a trip to Canada? (Select one)

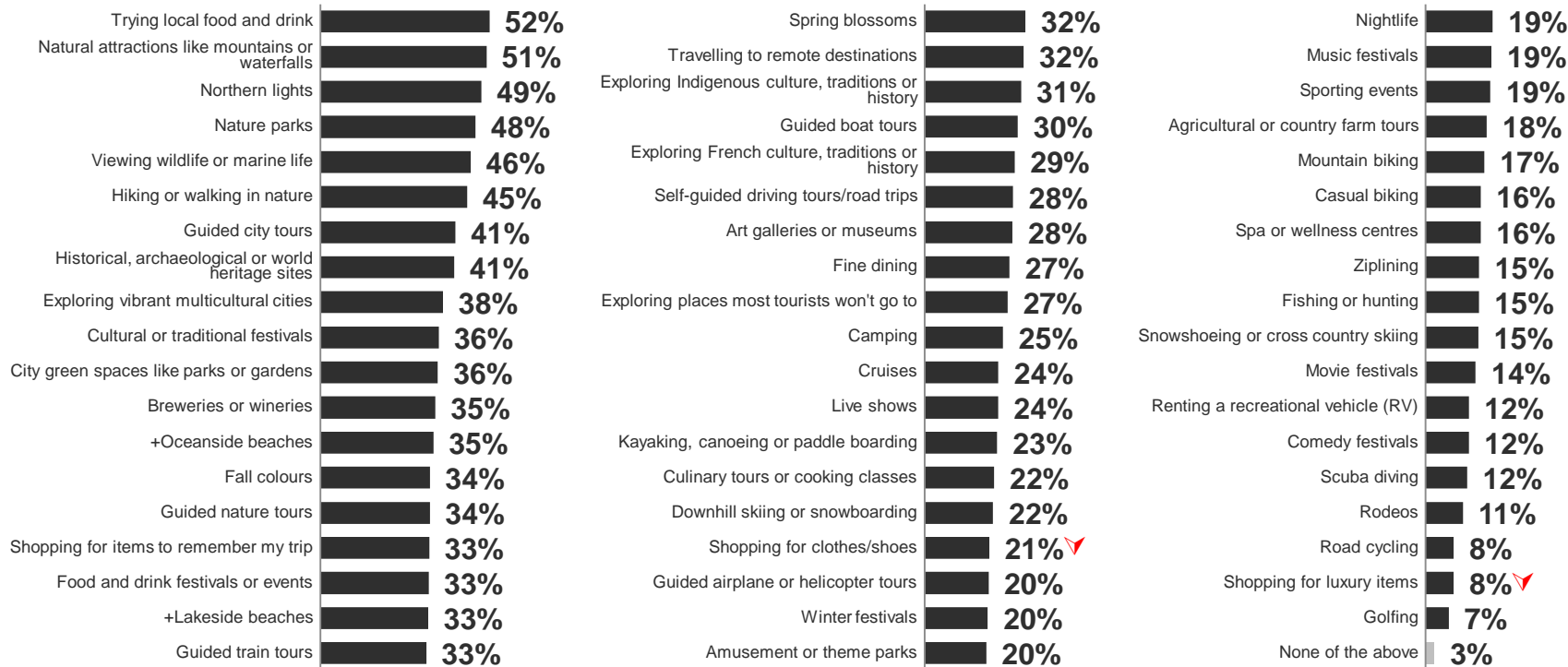
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286)
FT10. Which types of accommodation would you consider staying at during a trip to Canada? (Select all that apply)

Activities Interested in on Future Trip to Canada

- Trying local food and drink, natural attractions like mountains or waterfalls, and the Northern lights Activities remain the top activities of interest for Australian travellers considering a trip to Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

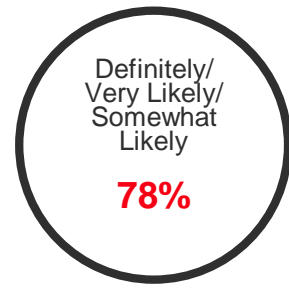
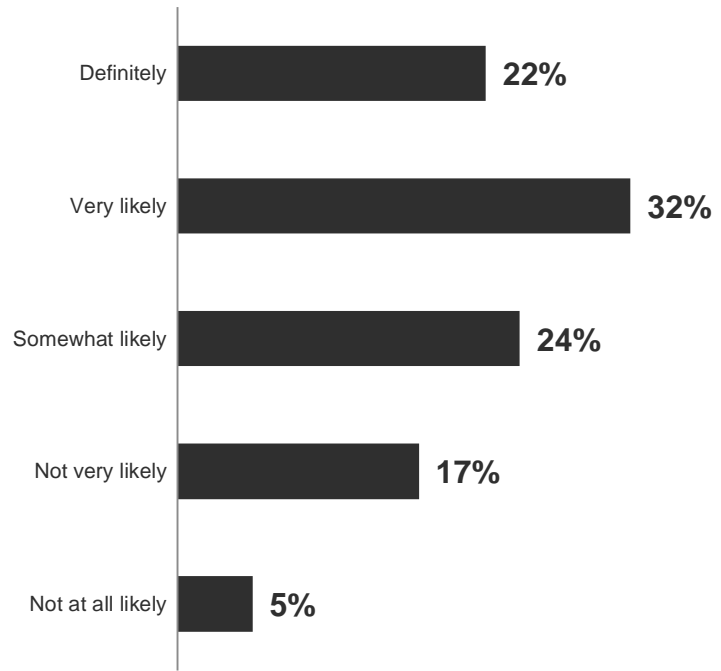
+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286)

FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

Travel Agent Usage for Future

► Travel agents and tour operators play a substantial role in supporting travel from Australia to Canada, with a large majority of potential Australian visitors indicating that they are likely to use a travel agent to research or book a trip to Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=286)

FT6. 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 STA Travel, they do not include online booking engines like Expedia or Webjet. How likely are you to use a travel agent or tour operator to help you research or book a trip to Canada?