

2021 Global Tourism Watch Highlights Report



China

Canada



Global Tourism Watch



 **DESTINATION
CANADA**

Study Overview: China 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



Oct

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: East Asia
(e.g., China, Hong Kong,
Macau, Japan, South
Korea and Taiwan)**



GTW Sample Distribution

Sample distribution: **National**

Recent visitors to Canada: **335**

Other travellers: **1,865**

Total sample size: **2,200**

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 China

Since the outbreak of COVID-19 in early 2020, China has imposed a strict “zero Covid” policy to prevent the spread of the virus and keep cases as close to zero as possible.¹ There were sporadic COVID-19 outbreaks which led to city or regional lockdowns.

Outbound travel situation

As part of the “zero Covid” policy, Chinese travel agents were banned from selling packages and group tours as of late January 2020.² Travel outside China for non-essential reasons was strongly discouraged and the availability of international flights was drastically reduced. Those choosing to travel internationally faced a minimum 14-day hotel quarantine upon return. As a result, domestic tourism has flourished. Macau is the only destination outside of mainland China which Chinese citizens can travel to for leisure with no quarantine on arrival or return.³ Plans to reopen the Hong Kong-mainland border for quarantine-free travel were put on hold indefinitely with the arrival of the Omicron variant in December 2021.⁴ In 2021, there were 8.5 million Chinese outbound travellers, which is less than 5% of the 2019 total.⁵

Canada’s borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. The list of approved vaccines was expanded in November 2021 to include two vaccines widely available in China. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.⁶

¹ China Briefing 2021/2022.

² Dragon Trail International, October 2021.

³ China Travel News, September 2021.

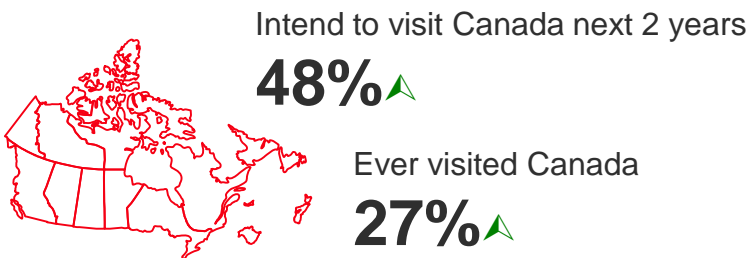
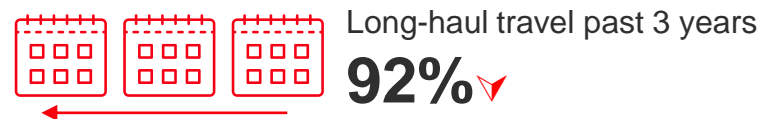
⁴ Dragon Trail International, October 2021.

⁵ DFNI, January 2022.

⁶ Government of Canada, September 2021.

Travel Indicators

Prior to the COVID-19 pandemic, China was a growth market with high levels of long-haul travel and future travel intention.



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

KEY HIGHLIGHTS

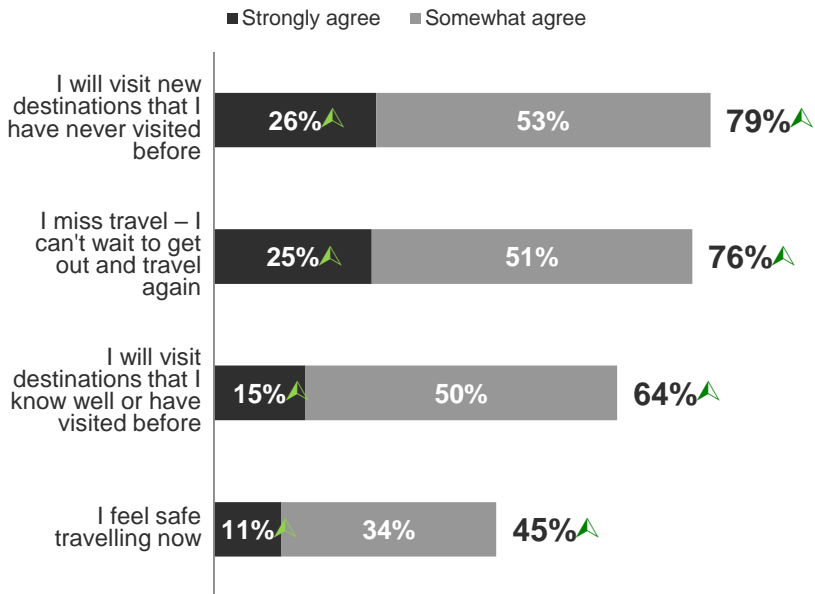
Insight	Implication
<p>While there is pent-up demand for travel among Chinese travellers, relatively few say they feel safe travelling. Although significantly more Chinese travellers say they feel safe travelling in 2021 compared to 2020, the proportion remains relatively low.</p>	<p><i>To best meet the opportunity of Chinese travellers' renewed interest in travel and encourage them to visit Canada once restrictions are relaxed and international travel is an option again, it will be important for messaging to illustrate that Canada is a safe destination.</i></p>
<p>COVID-19 concerns related to caseloads, travel insurance, medical care, and the possibility of being stranded are generally subsiding, but concerns about health and safety measures and quarantine requirements (both at the destination and upon return to China) persist. Vaccination levels in a country and vaccine passport requirements are also moderately important considerations for Chinese travellers.</p>	<p><i>Once Chinese travellers are able to travel internationally, it will be important to communicate Canada's current health and safety regulations, entry requirements for fully vaccinated travellers (including acceptance of Chinese vaccines), and lack of quarantine requirements.</i></p>
<p>Travel is the top spending priority for the next year, and Chinese travellers are planning to spend slightly more on long-haul travel post-COVID-19 than they did pre-COVID-19. Anticipated spending on long-haul travel is considerably higher than anticipated spending on domestic travel and 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 once Chinese travellers are able to travel internationally.</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 one of the top activities Chinese travellers would base a trip around, and growing in popularity for a trip to Canada.</p>	<p><i>While outdoor activities are still popular for a trip to Canada, 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 Chinese travellers.</i></p>
<p>Interest in visiting Canada during the spring season outpaces historical visitation during those months. Additionally, spring is the preferred season to take part in many popular vacation activities, while others hold three- or four-season appeal.</p>	<p><i>There is an opportunity to disperse Chinese visitation into the spring by promoting activities that are popular outside of the busy summer months.</i></p>
<p>Travel agents and tour operators play a pivotal role in supporting travel from China to Canada. Almost all potential Chinese 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 Chinese travel trade is important to boosting visitation to Canada.</i></p>

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

- ▶ Significantly more Chinese travellers say they are eager to travel again (76%, up from 68% in 2020), yet just 45% say they feel safe travelling now (up from 39% in 2020). Chinese travellers have a strong preference to visit new destinations over familiar ones.
- ▶ Despite ongoing COVID-19 restrictions, Chinese travellers are also growing more comfortable with using most forms of transportation. Comfort levels are higher for domestic air travel than international air travel.

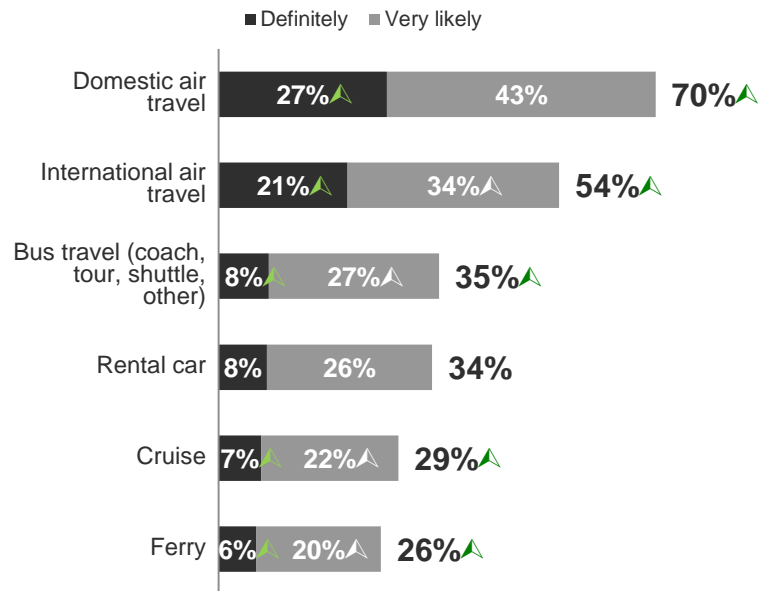
Attitudes Toward Travel



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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements?

Transportation Modes

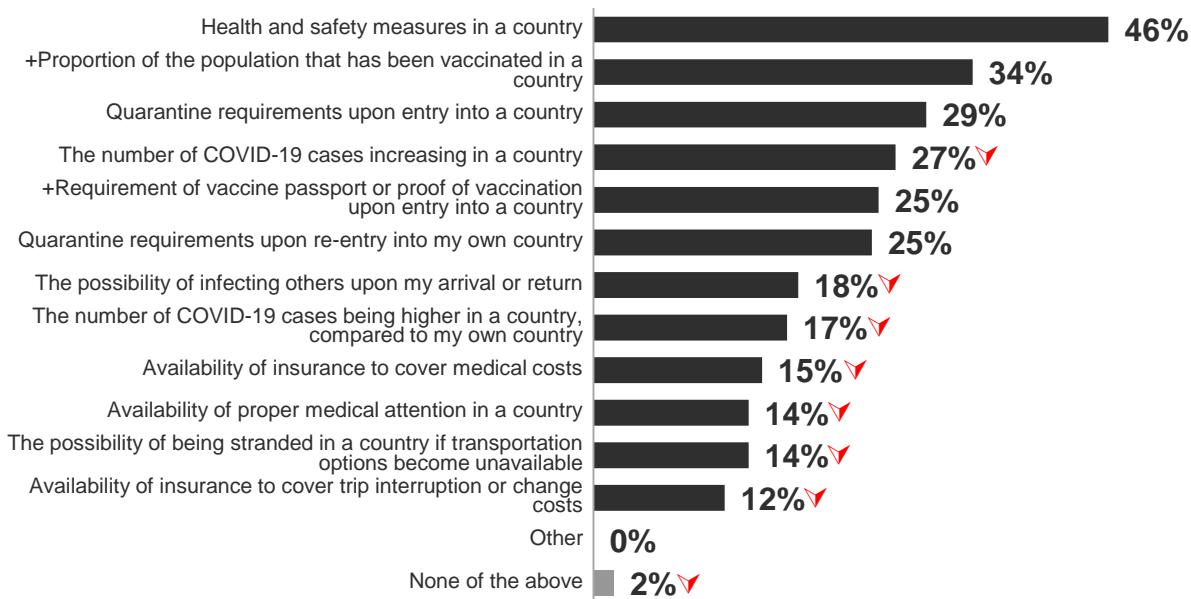


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200) 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, health and safety measures remain the top concern for Chinese travellers. Vaccination levels in a country and the requirement for proof of vaccination/vaccine passports are also moderately high on Chinese travellers' list of considerations when selecting a travel destination. Concerns about COVID-19 caseloads, travel insurance, medical care, and the possibility of being stranded are generally subsiding.
- ▶ Despite the requirement for a minimum 14-day hotel quarantine upon re-entry to China, Chinese travellers are more concerned about quarantine requirements at a destination than upon return to China.



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=2200)

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)

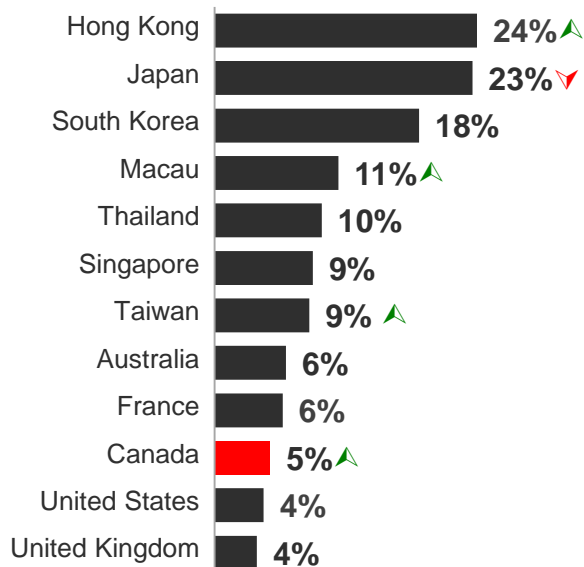
Key Performance Indicators

Unaided Long-Haul Destination Consideration (Next 2 Years)

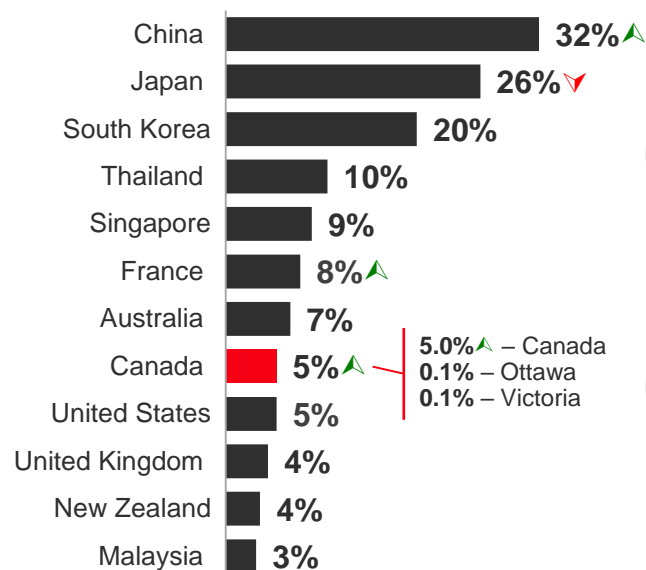
Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is tied with the United States as the #8 top-of-mind country that Chinese travellers are considering visiting in the next 2 years. Due to travel restrictions in place at the time of data collection, it is not surprising that mentions of China are up significantly compared to 2020. While down from 2020 levels, 26% of Chinese travellers still indicate they are not planning to travel.

Top 12 Destination Brands¹



Top 12 Destination Countries²



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

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).

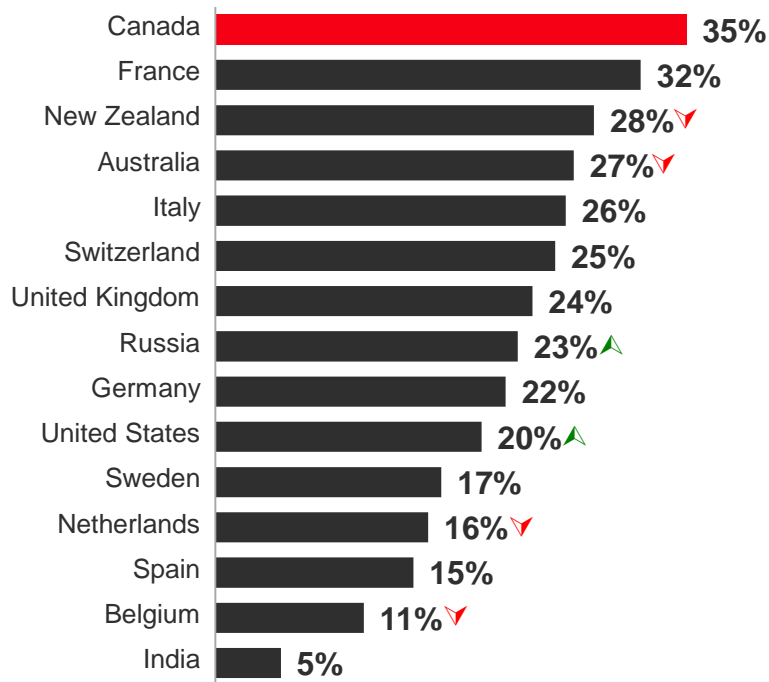
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

S8. You mentioned that you are likely to take a long-haul holiday trip outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan) 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 continues to rank first on aided consideration, just ahead of France. Aided consideration for some top competitors, New Zealand and Australia, has dropped significantly since 2020.



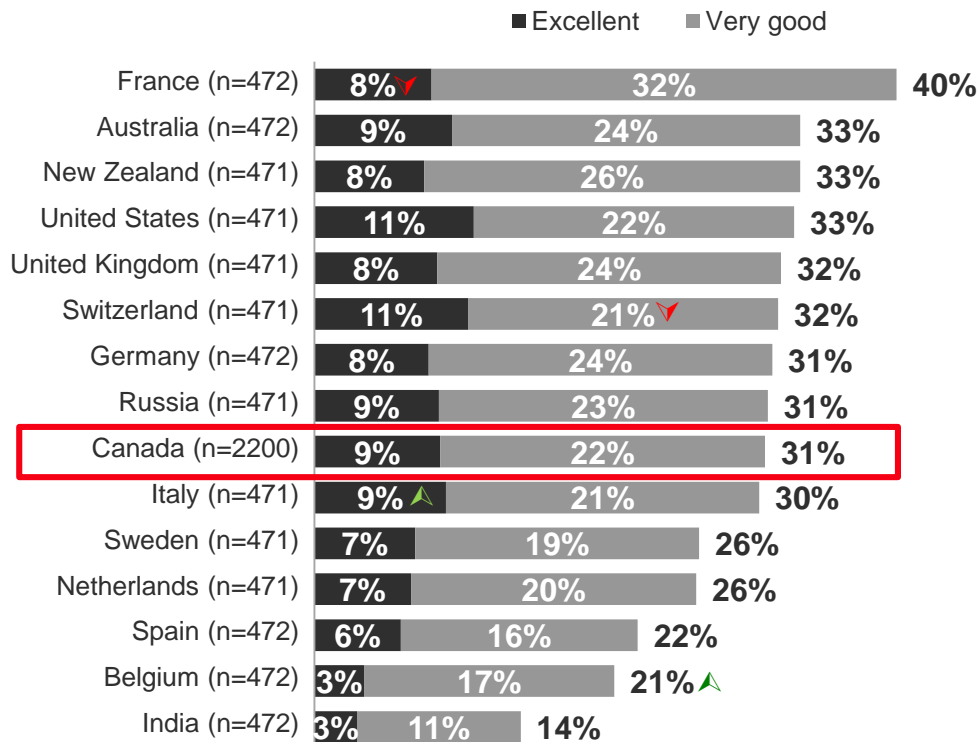
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

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

- ▶ Canada remains in the middle of the pack on destination knowledge among long-haul competitors – in a three-way tie with Russia and Germany for the 7th spot and trailing the #1 ranked France by a considerable margin.



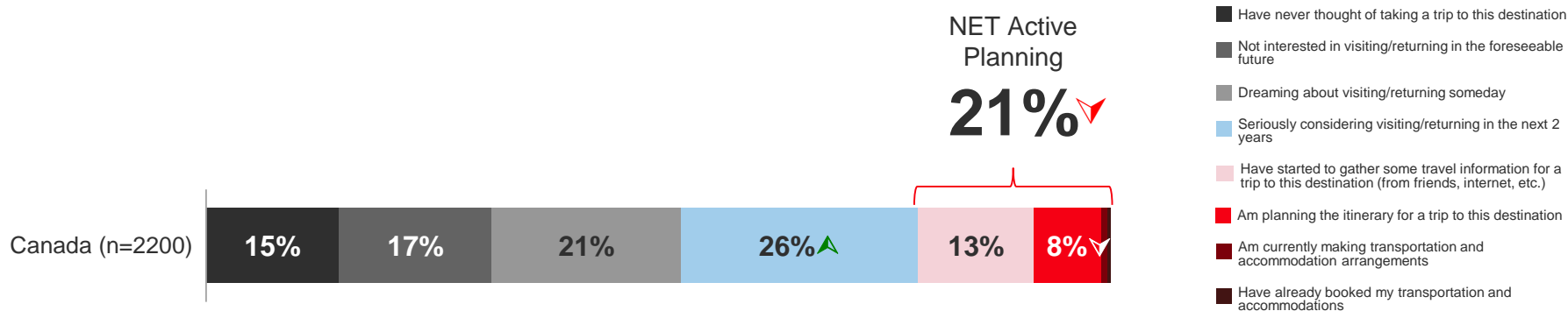
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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 9% and 26% of Chinese 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 four other destinations. 21% of Chinese travellers report that they are in the NET active planning stages for a trip to Canada, down significantly from 2020. This suggests that several destinations are under serious consideration by Chinese travellers and Canada may face a challenge converting interested travellers into visitors.
- ▶ Compared to 2020, more Chinese travellers say that they are seriously considering visiting Canada in the next 2 years, while fewer are planning an itinerary, which may be related to the travel restrictions facing Chinese travellers at the time of data collection.



▲ / ▼ 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.

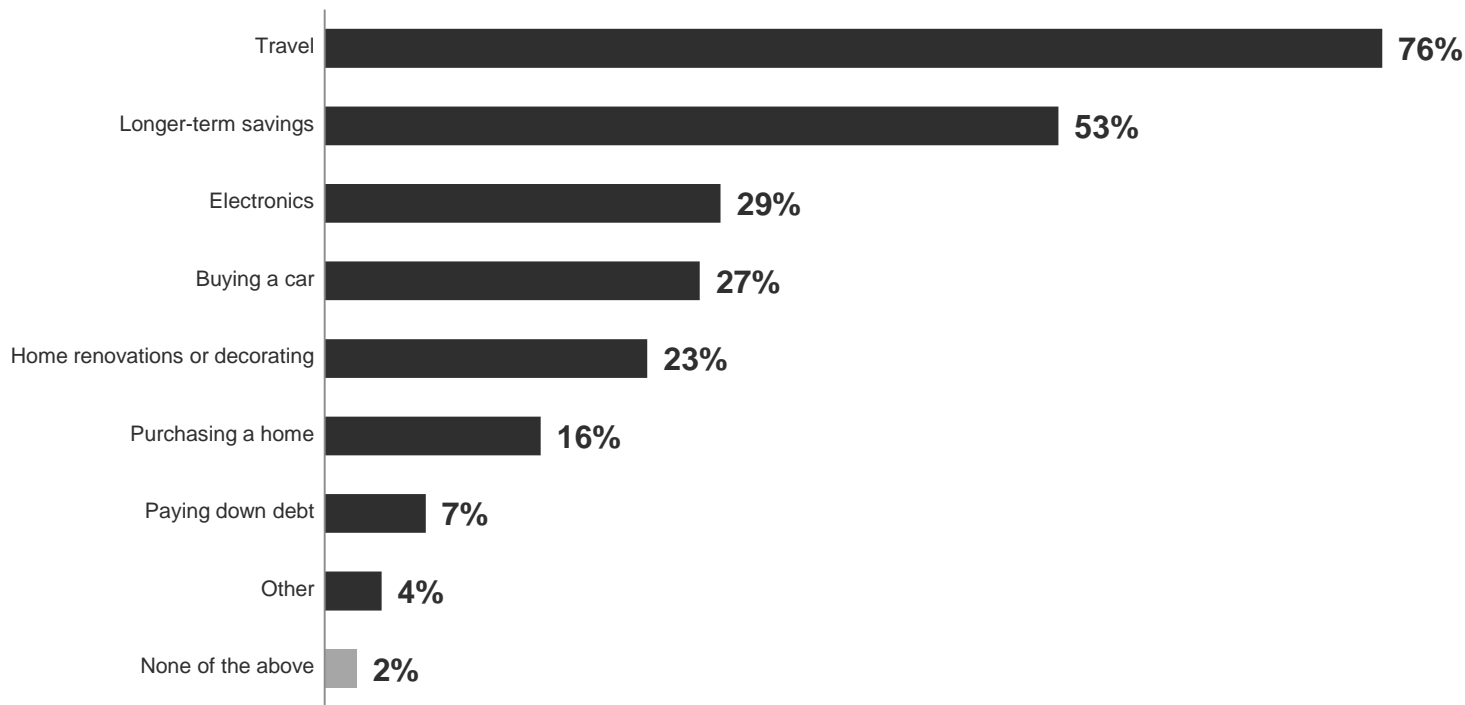
► Compared to competitive destinations, Canada is ranked 4th overall on NPS. This marked a slight drop from the 3rd spot in 2020.



Travel Spending and Canada Travel Intent

Spending Priorities for the Next Year⁺

► Travel is the top immediate spending priority for Chinese travellers in 2021, far ahead of secondary priorities such as savings and electronics.



⁺ New question in 2021 GTW – no trending.

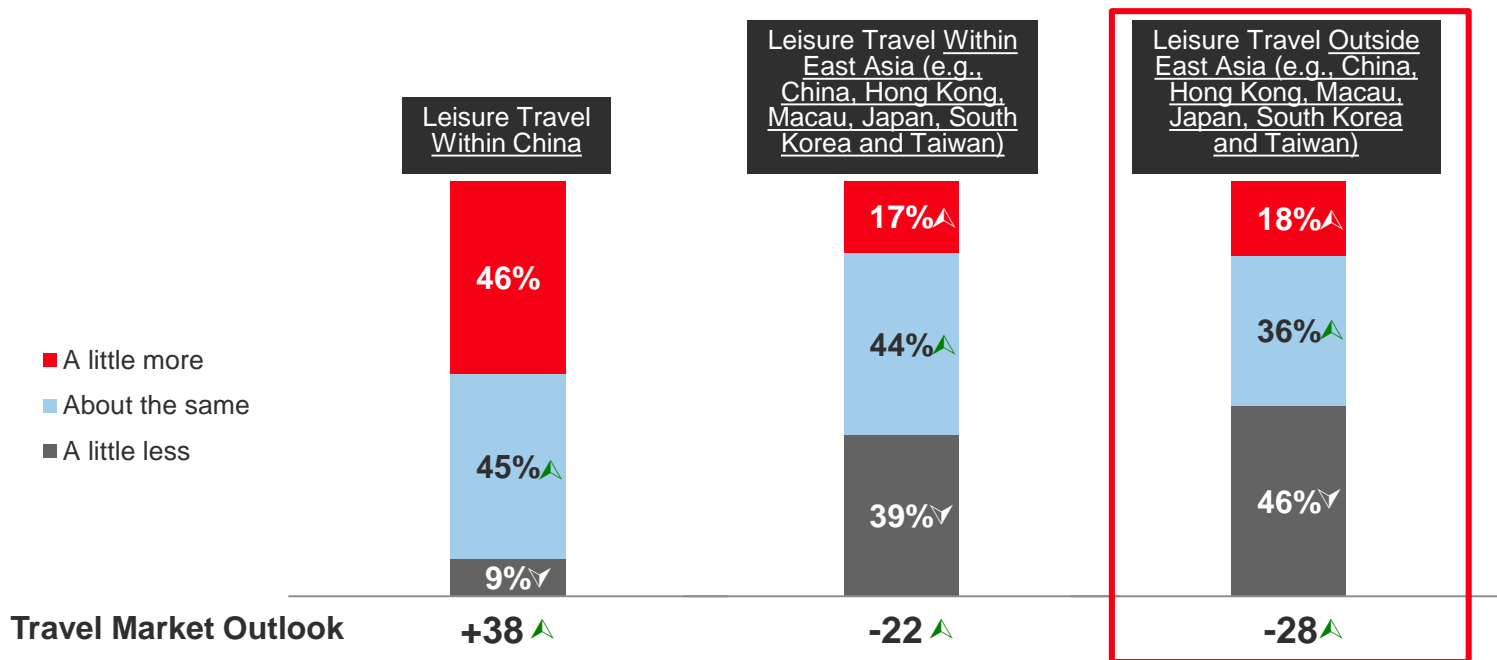
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

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.

- ▶ Chinese travellers foresee spending more on all types of travel in the next year than they did in the past year.
- ▶ While the long-haul travel outlook is still negative and far below 2019 (+24), it is significantly improved from 2020 (-44).



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

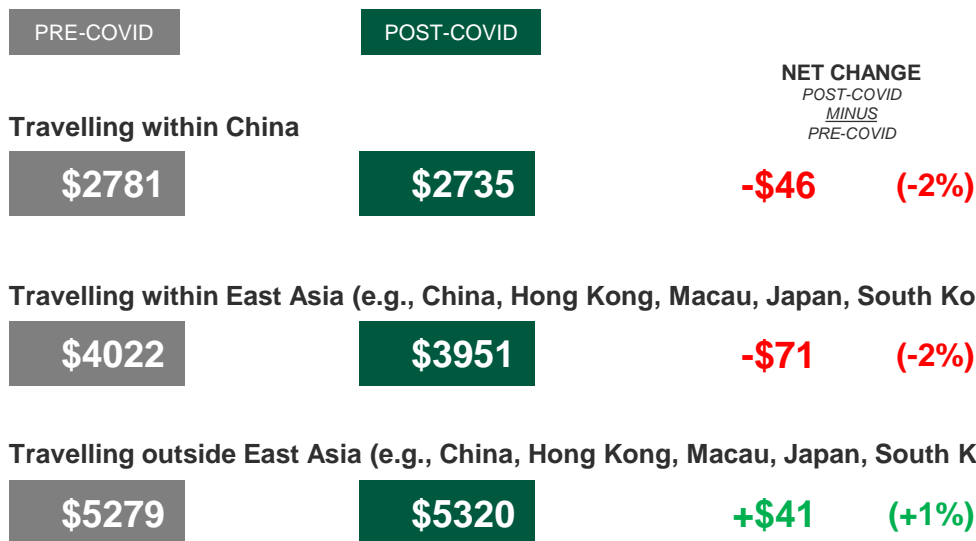
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

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+

- ▶ Although travel is a spending priority and the outlook for spending on travel has improved compared to 2020, Chinese travellers don't anticipate much change in their spending on travel post-COVID-19 compared to pre-COVID-19, regardless of the destination.
- ▶ Long-haul travel is projected to see modest growth in spending, and anticipated spending on long-haul travel (\$5,320) is considerably higher than anticipated spending on domestic travel (\$2,735) and short-haul travel (\$3,951).

Mean Annual Household Spend on Vacation Trips



* New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=1692 Domestic / n=1423 Short-haul / n=1312 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=1677 Domestic / n=1413 Short-haul / n=1361 Long-haul)

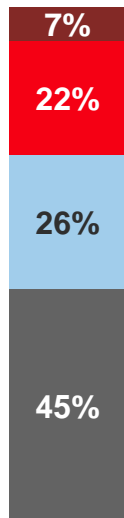
TP2B_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

Likelihood of Visiting Canada in Next 2 Years

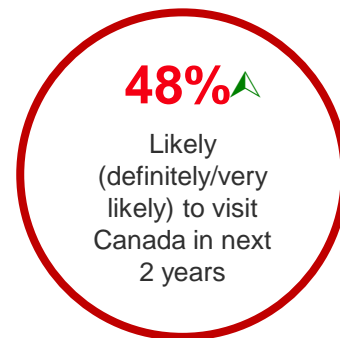
- ▶ Among all Chinese travellers, the likelihood of visiting Canada in the next two years is up significantly from 2020.
- ▶ Intent to visit Canada in the next two years is highest among those aged 55+ and lowest among those aged 18-34.
- ▶ Chinese travellers are more likely to be considering a longer trip of 4+ nights than a shorter trip of 1-3 nights when visiting Canada in the next 2 years.

Likelihood of Taking a Trip of: 1 to 3 nights

- Definitely
- Very likely
- Somewhat likely
- Not interested



Likelihood of Taking a Trip of: 4+ nights



▲ / ▼ 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=2200)

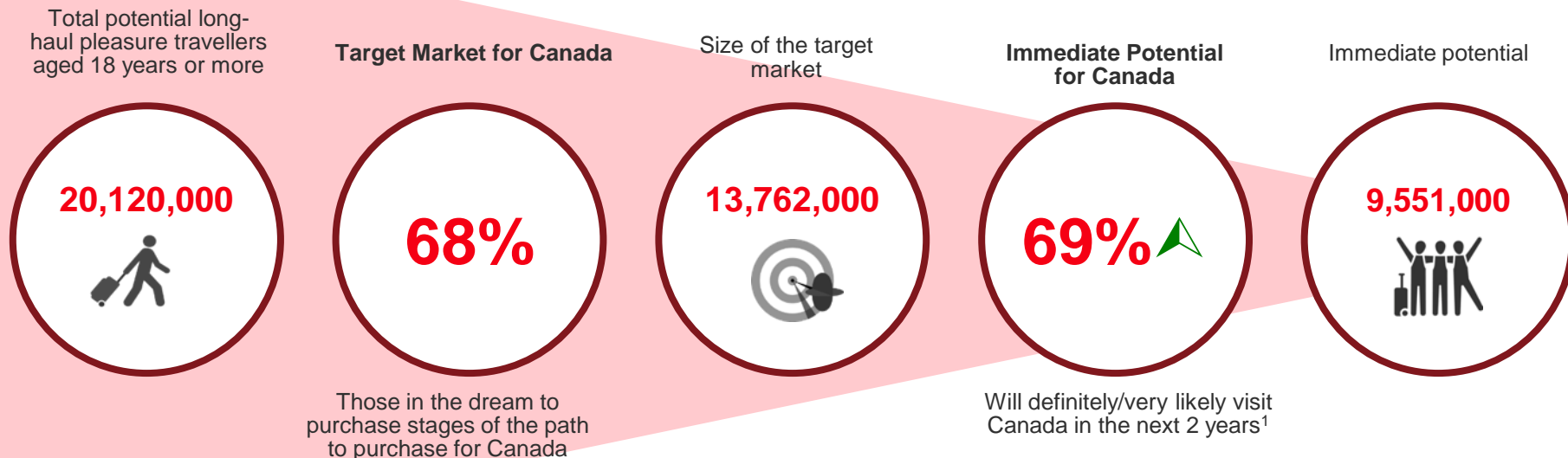
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

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 Chinese 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 Chinese travellers considering Canada remained stable in 2021, but within that group the intention to visit in the next two years increased significantly, resulting in an immediate potential market size of 9.6 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=2200); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1552)

MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

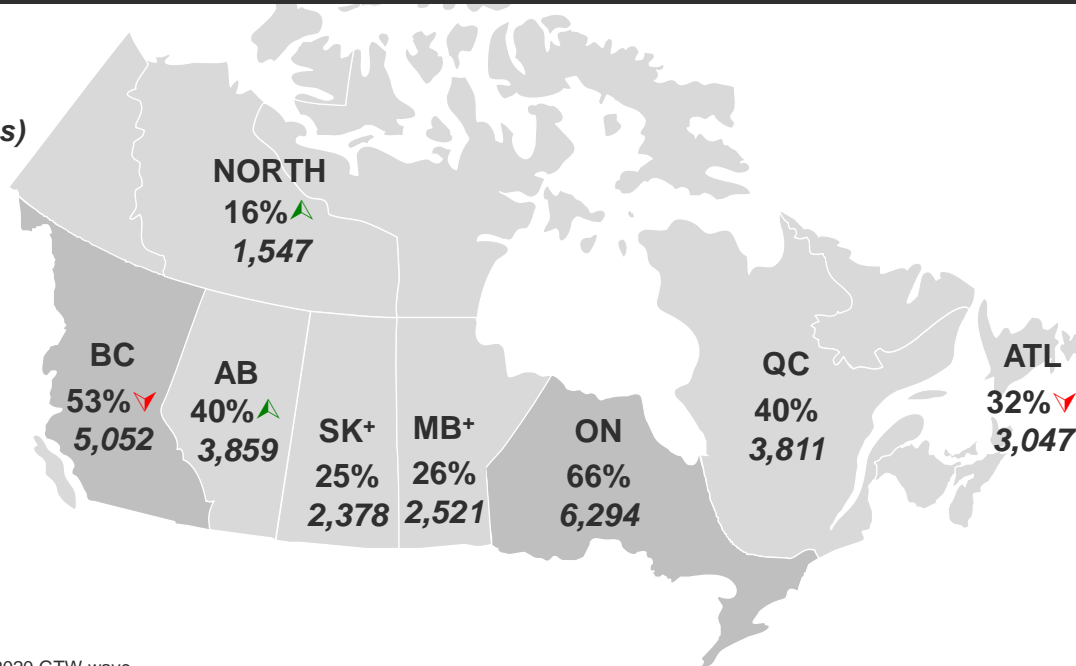
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size for the Regions

- ▶ Ontario and BC continue to stand out as the provinces most likely to attract the largest share of Chinese travellers. However, compared to 2020 interest in BC declined in 2021, as did interest in the Atlantic region. By contrast, interest in visiting Alberta and the North is on the rise.

Immediate Potential for Canada: **9,551,000**

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



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

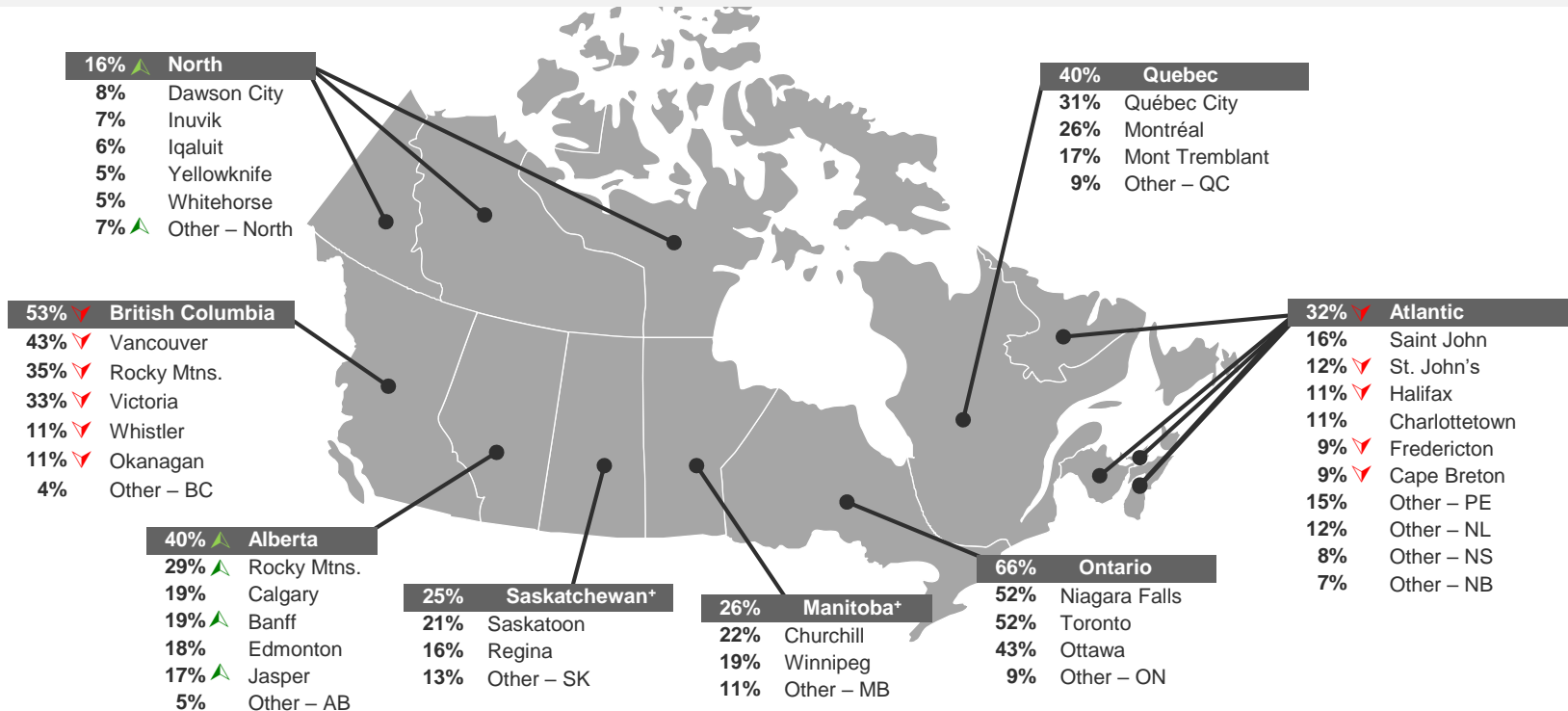
* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

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=1106)

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 and the Atlantic region is fueled by declining interest in many top destinations in those regions. Meanwhile, the growing interest in Alberta is driven by increased interest in mountain destinations.



▲ / ▼ 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=1106)

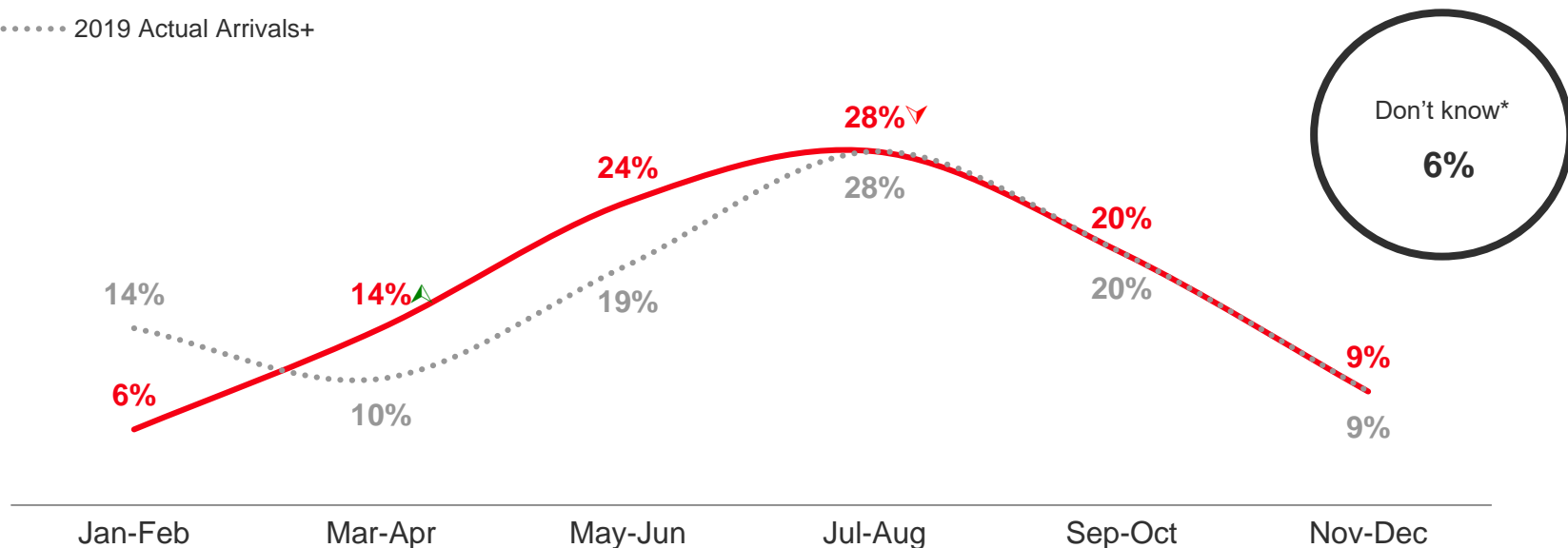
MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

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

China Seasonal Demand for Canada

- ▶ July and August are the most popular months for Chinese travellers considering a visit to Canada, and also historically the peak months for visitor arrivals from China.
- ▶ However, demand appears to be shifting away from the peak summer period, while interest in visiting in early spring (March-April) is growing. This presents an opportunity to potentially disperse some Chinese visitation into the spring months, given that demand outpaces historical visitation during these months.

— 2021 China Traveller Demand
 2019 Actual Arrivals+



+ Source: 2019 Statistics Canada Frontier Border Counts.

* 'Don't know' responses excluded from seasonal demand chart.

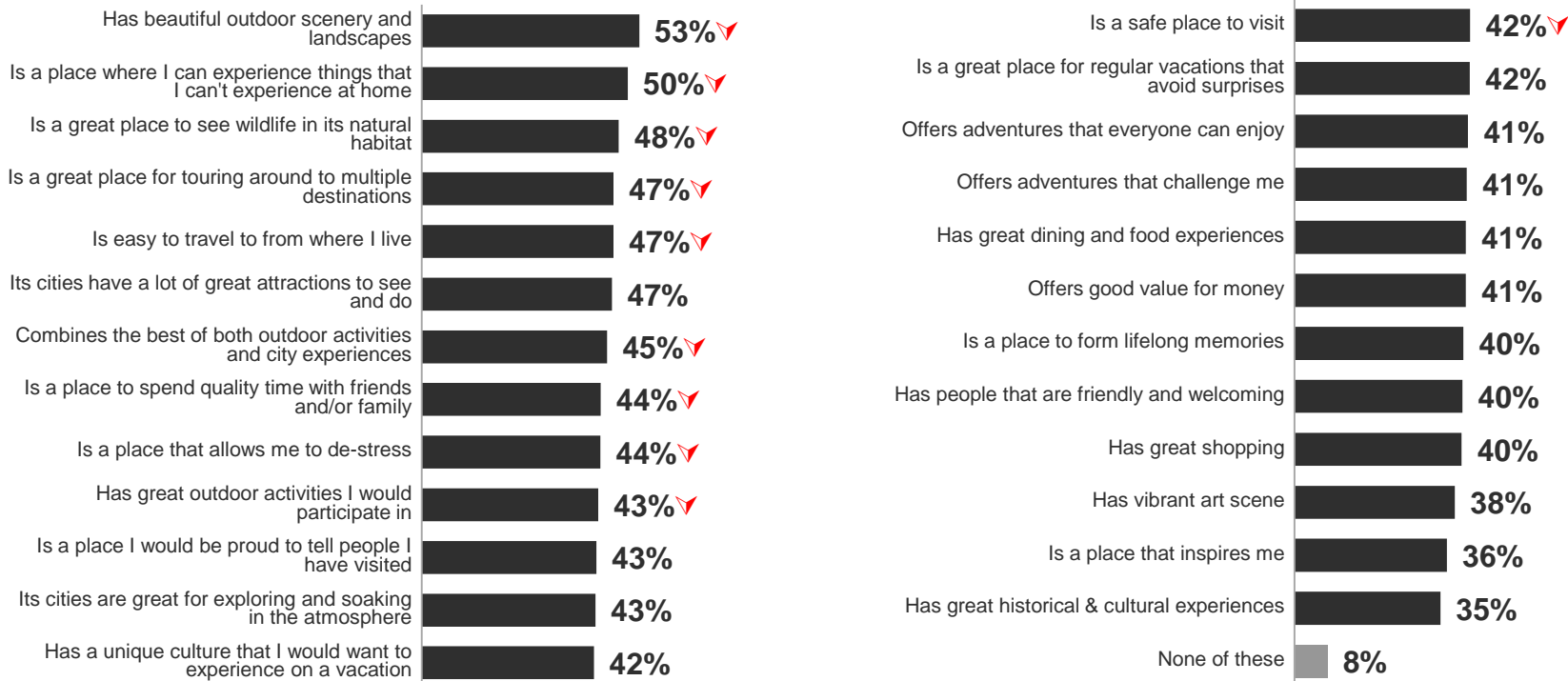
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=1470)
 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 Chinese travellers for beautiful scenery and landscapes, offering unique experiences, and as a place to see wildlife. However, the proportion of Chinese travellers associating Canada with these top attributes, as well as several other attributes, declined in 2021.



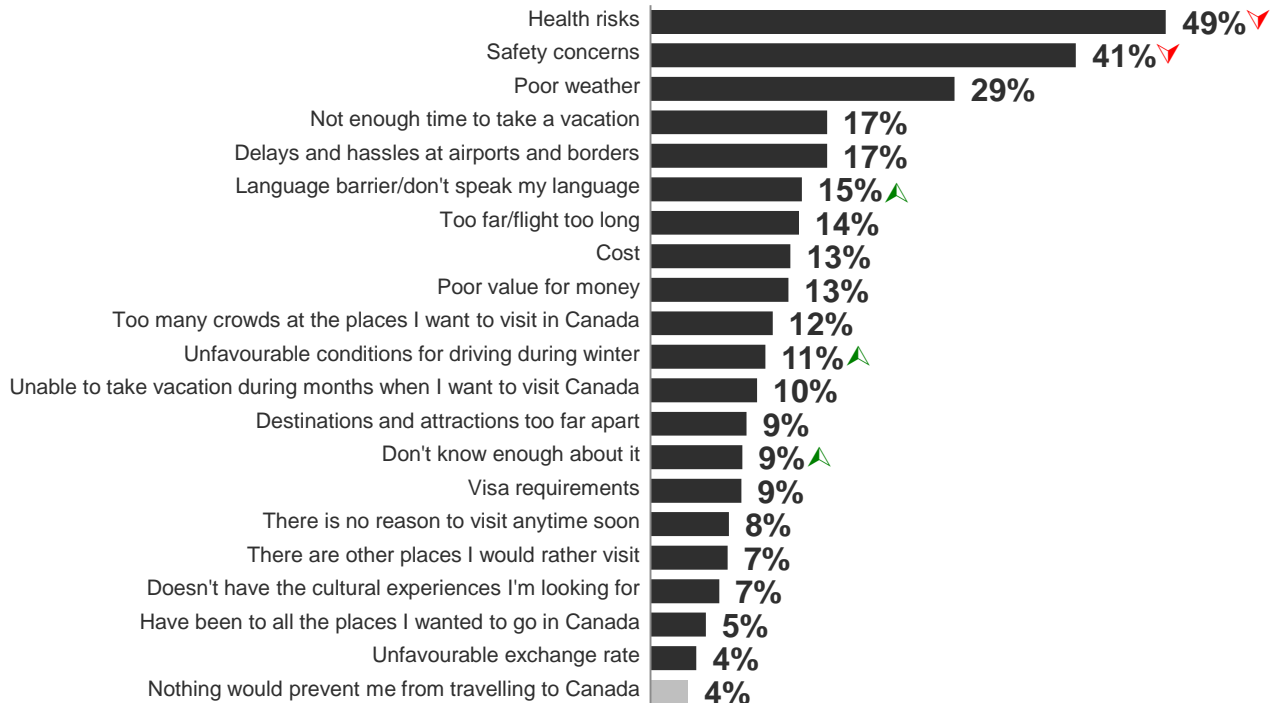
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

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

- ▶ Similar to 2020, health risks and safety concerns continue to stand out as the top deterrent for potential Chinese travellers to visit Canada in 2021, although both have declined as COVID-19 vaccines became more globally available.
- ▶ Concerns about a language barrier, unfavourable winter driving conditions, and lack of knowledge about Canada are on the rise.



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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)
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, Chinese travellers have a strong preference for nature-based holiday activities.
- ▶ While interest in seeing the Northern lights and shopping is up relative to 2020, general interest in a wide variety of other vacation activities, including both nature and city-based activities, has decreased compared to 2020.



+ New statement in 2021 GTW – no trending.

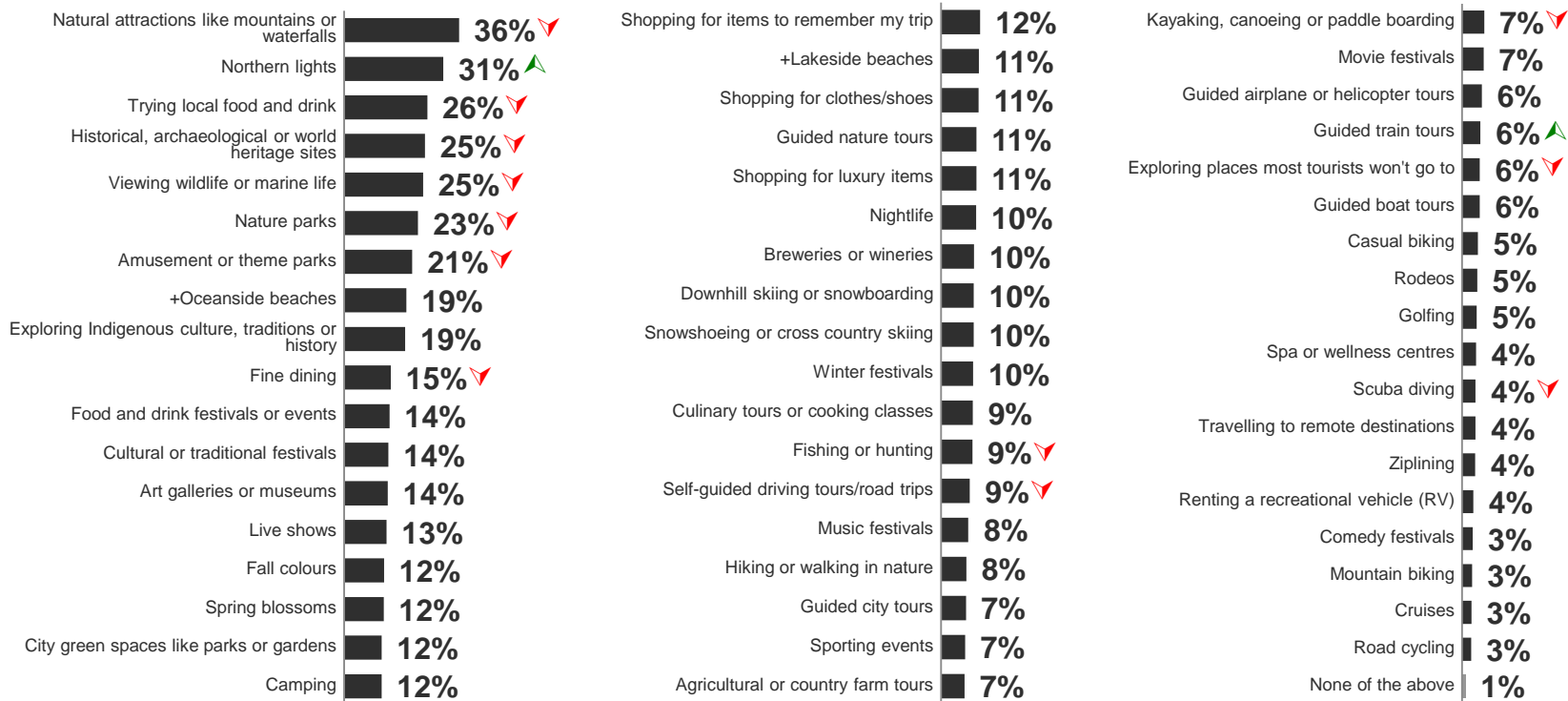
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

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

- Interest in planning a trip around seeing the Northern lights is very high and has increased relative to 2020, which presents a key opportunity for Canada. Other natural attractions like mountains and waterfalls are the top activity Chinese travellers would base a trip around, though interest is down relative 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=2183)

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 many of the listed vacation activities, followed by summer. Other activities such as trying local food and drink 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	58%	54%	39%	63%
+ Oceanside beaches	81%	20%	12%	31%
Natural attractions like mountains or waterfalls	50%	39%	18%	48%
Historical, archaeological or world heritage sites	33%	52%	24%	60%
Northern lights	23%	19%	73%	17%
+ Lakeside beaches	77%	26%	12%	37%
Amusement or theme parks	46%	46%	22%	66%
Nature parks	36%	49%	23%	70%
Viewing wildlife or marine life	51%	35%	18%	57%
Exploring Indigenous culture, traditions or history	50%	58%	42%	65%
Snowshoeing or cross country skiing	n/a	n/a	100%	n/a
Camping	51%	43%	15%	54%
Food and drink festivals or events	57%	45%	32%	51%
Fine dining	48%	56%	43%	61%
Shopping for items to remember my trip	52%	48%	41%	63%
Art galleries or museums	43%	52%	45%	67%
Spring blossoms	n/a	n/a	n/a	100%
City green spaces like parks or gardens	43%	43%	23%	74%

	Summer	Fall	Winter	Spring
Live shows	42%	47%	31%	55%
Culinary tours or cooking classes	39%	40%	35%	58%
Cultural or traditional festivals	42%	44%	35%	57%
Hiking or walking in nature	34%	48%	20%	69%
Downhill skiing or snowboarding	n/a	n/a	100%	n/a
Nightlife	71%	36%	23%	45%
Fishing or hunting	52%	35%	24%	52%
Shopping for clothes/shoes	48%	43%	39%	57%
Kayaking, canoeing or paddle boarding	70%	23%	13%	37%
Fall colours	n/a	100%	n/a	n/a
Ziplining	41%	35%	30%	49%
Shopping for luxury items	49%	53%	46%	64%
Breweries or wineries	40%	48%	38%	48%
Guided nature tours	30%	49%	30%	62%
Agricultural or country farm tours	27%	41%	23%	60%
Winter festivals	n/a	n/a	100%	n/a
Music festivals	54%	38%	23%	51%
Guided city tours	44%	41%	36%	64%

	Summer	Fall	Winter	Spring
Movie festivals	47%	43%	42%	62%
Self-guided driving tours/road trips	27%	55%	23%	69%
Scuba diving	73%	20%	13%	30%
Sporting events	48%	36%	30%	56%
Golfing	40%	31%	28%	60%
Mountain biking	38%	34%	23%	59%
Exploring places most tourists won't go to	33%	41%	42%	51%
Guided boat tours	47%	34%	33%	53%
Guided airplane or helicopter tours	34%	37%	34%	55%
Casual biking	33%	45%	21%	64%
Travelling to remote destinations	38%	46%	29%	62%
Cruises	29%	35%	26%	63%
Road cycling	31%	33%	25%	66%
Guided train tours	34%	34%	39%	60%
Spa or wellness centres	44%	34%	47%	46%
Rodeos	43%	33%	24%	53%
Comedy festivals	44%	38%	35%	56%
Renting a recreational vehicle (RV)	38%	29%	30%	56%

⁺ New question in 2021 GTW – no trending.

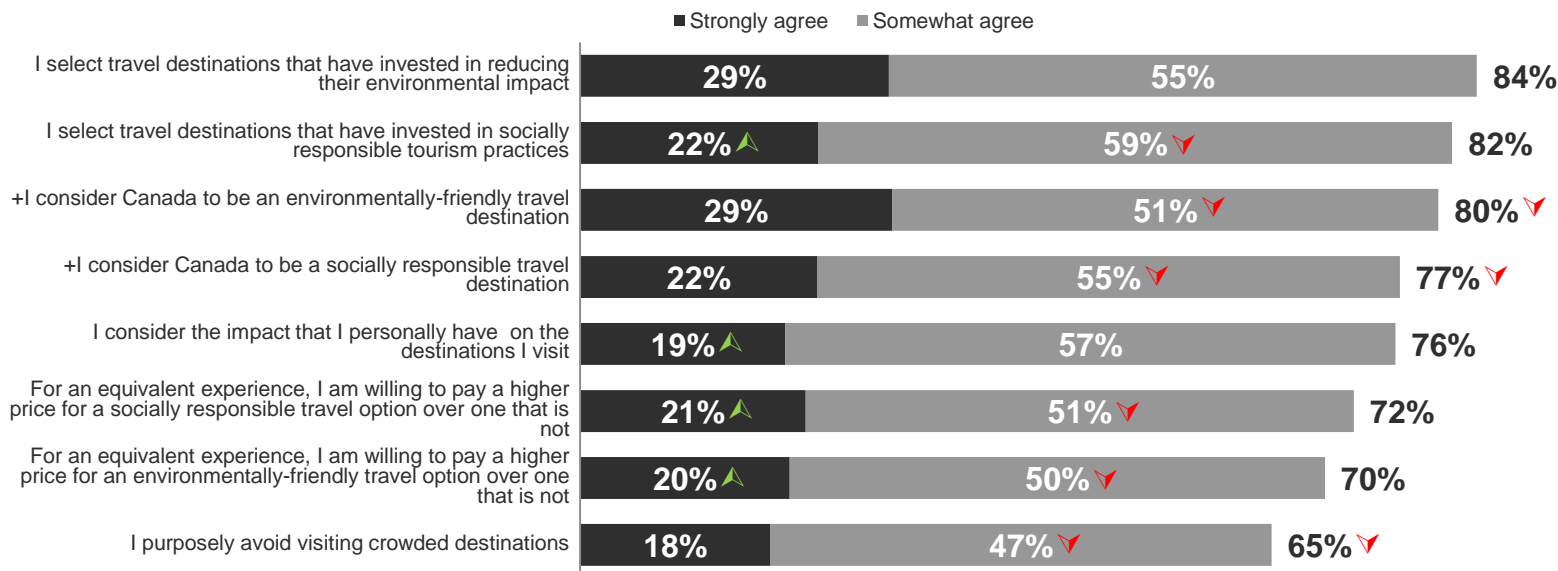
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's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

- ▶ Just over three-quarters of Chinese travellers say they are thinking about their personal impact on travel destinations, with just slightly fewer saying they would pay more for socially responsible and environmentally-friendly options.
- ▶ A majority of those interested in taking a trip to Canada consider it to be an environmentally-friendly and socially responsible travel destination, though these positive impressions have dropped compared to 2020.
- ▶ However, a much smaller number mention the availability of eco-friendly (18%) or socially responsible (18%) travel options as factors influencing their choice of Canada as a travel destination.¹



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

¹Data can be found on page 32.

+ Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=1552)

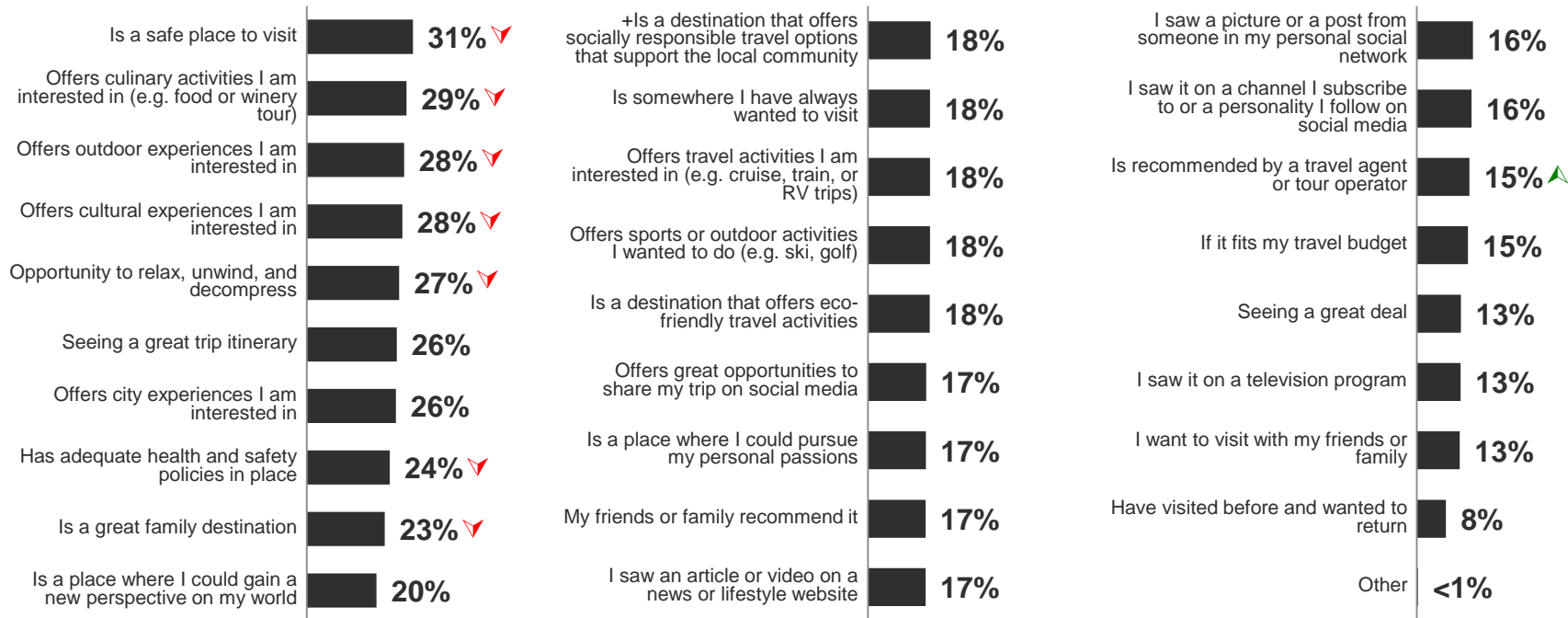
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)

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 Chinese travellers to choose Canada as a holiday destination include destination safety, the availability of interesting culinary activities, and the availability of interesting outdoor experiences.
- ▶ Several of the top factors have decreased in importance as reasons to choose Canada since 2020.



* New statement in 2021 GTW – no trending.

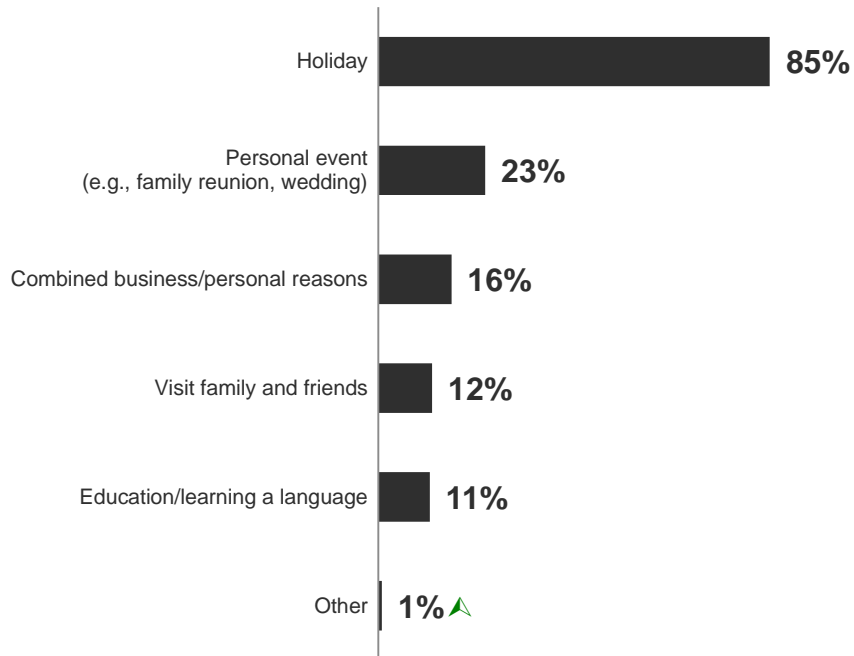
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840)
FT3. Which of the following would factor into your choice to travel to Canada? (Select all that apply)

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

Main Purpose and Travel Party of Future Trip

- ▶ Holiday trips will drive Chinese travel to Canada in the next 2 years, with personal events (e.g. family reunion, wedding) playing a smaller role.
- ▶ Chinese travel parties visiting Canada will be largely be made up of immediate family – primarily couples trips or family trips with children.

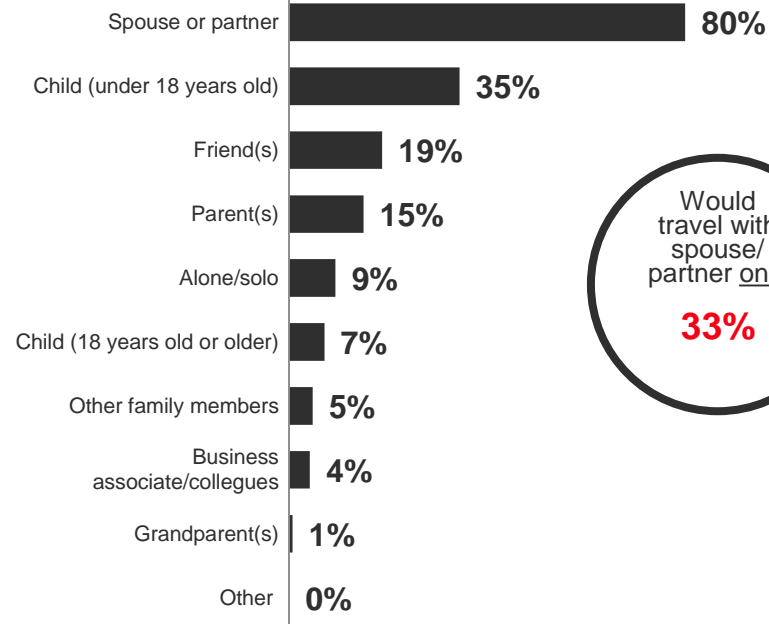
Purpose of Trip



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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840) FT2. If you took a trip to Canada, what would be the main purpose of this trip?

Travel Party



Would travel with spouse/partner only

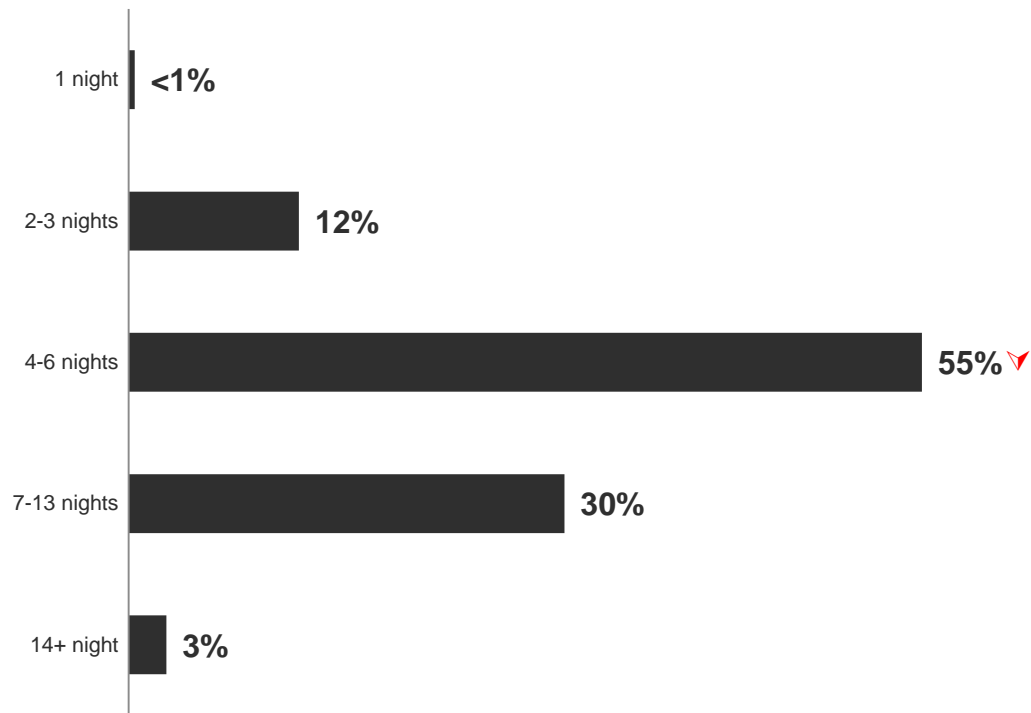
33%

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840) FT5. Who would you travel with on a trip to Canada? (Select all that apply)

Length of Future Trip

- Chinese travellers typically would like to spend at least four nights in Canada. The strongest preference is for a stay of 4-6 nights, although this number has fallen since 2020.



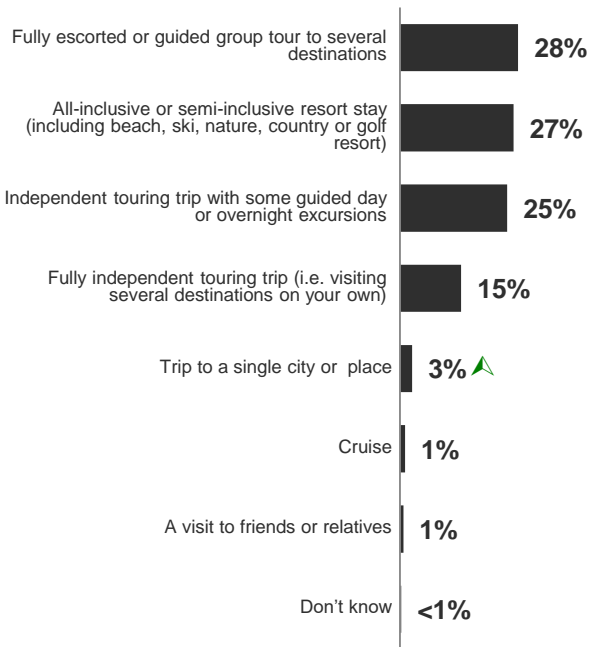
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840)
FT4. How many nights do you think you would spend on a trip to Canada?

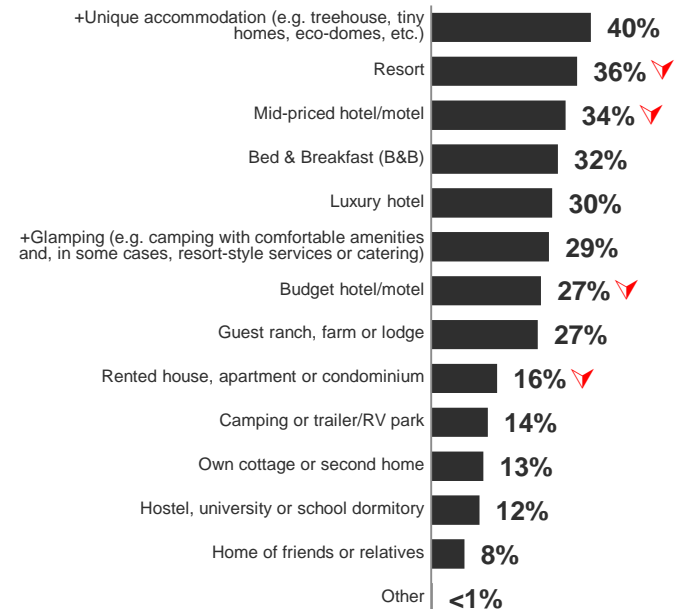
Trip Type and Accommodation for Future Trip

- ▶ Chinese travellers are split on the type of trip they would prefer on a visit to Canada. Fully guided tours, partially guided options, and all-inclusive packages are all similarly popular choices for a trip to Canada.
- ▶ Chinese travellers have a strong interest in unique accommodation options. Resorts and mid-priced accommodations are also popular, but interest is decreasing.

Trip Type



Type of Accommodation



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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840) FT9. What type of trip do you think you would be most likely to book for a trip to Canada? (Select one)

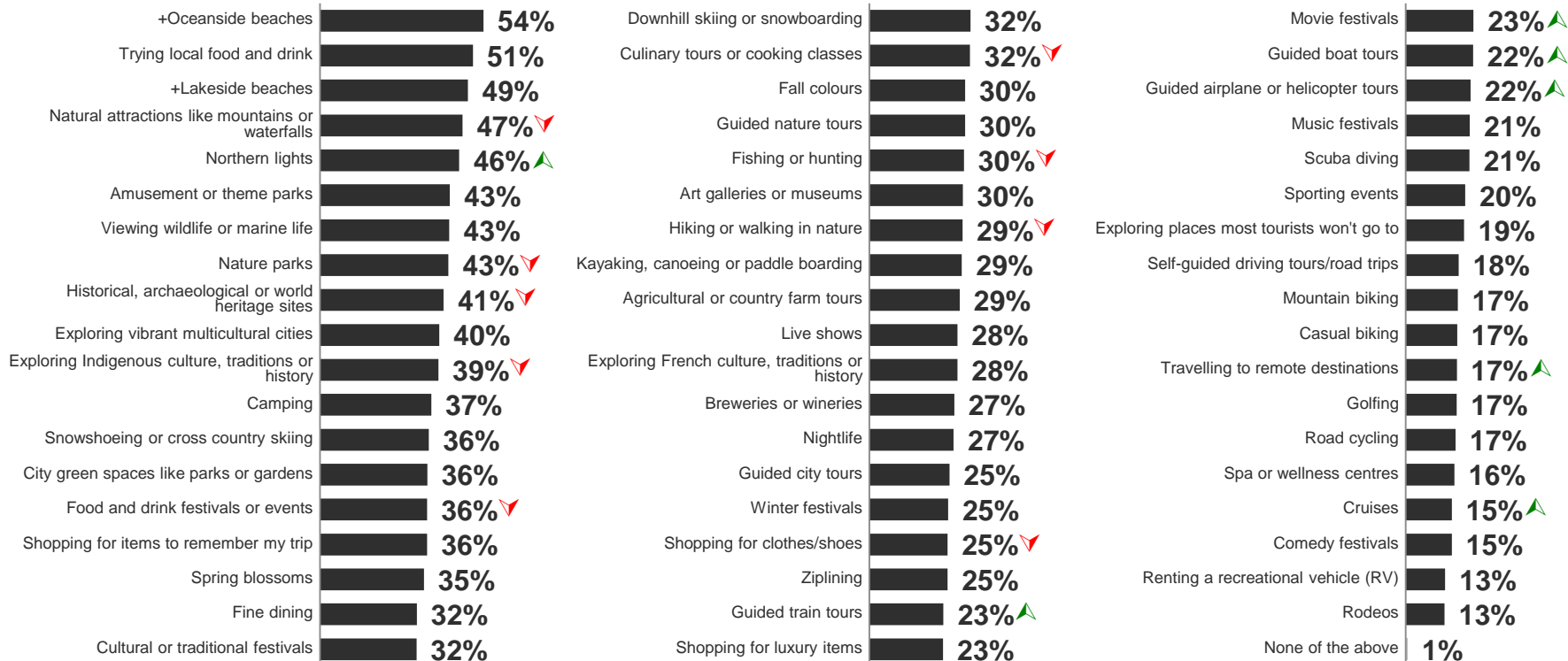
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840) 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

► Chinese travellers' interest in viewing the Northern lights in Canada increased significantly in 2021 and is now the #5 activity of interest for a trip to Canada. This presents a strong opportunity for Canada, as viewing the Northern lights is also one of the top activities that they would base a trip around. While there is still a strong preference among Chinese travellers for nature-based activities on a trip to Canada, interest in some of those top activities has dropped relative to 2020.



+ New statement in 2021 GTW – no trending.

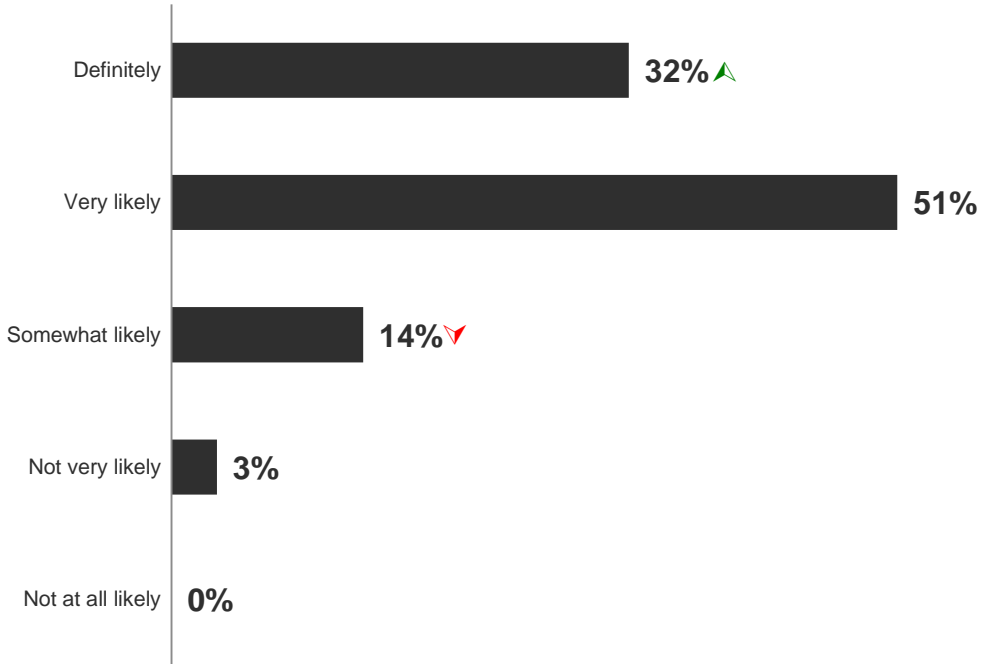
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840)

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

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

Travel Agent Usage for Future

► Travel agents and tour operators play a pivotal role in supporting travel from China to Canada, with almost all potential Chinese visitors indicating that they are likely to use a travel agent to research or book a trip to Canada. Of note, the proportion saying they will definitely use an agent has jumped to 32%, up from 26% in 2020, which may be related to the travel restrictions facing Chinese travellers at the time of data collection.



Definitely/
Very Likely/
Somewhat
Likely
97%

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=840)

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 CITS, CYTS, or Utour, they do not include online booking engines like Ctrip, Qunar, Fliggy or TUNI. How likely are you to use a travel agent or tour operator to help you research or book a trip to [destination]?