DESTINATION CANADA

Global Tourism Watch

2017 China Public Summary Report

Canada

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Introduction

Destination Canada began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to provide consumer-based intelligence in 11 core markets around the world: Australia, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom, the United States, and the domestic Canadian market.

The overall objectives of the GTW study are to:

- Monitor awareness, travel intentions, and other key market indicators for Canada and the regions;
- Assess perceptions of Canada and track brand performance against competitors over time;
- Identify the general experiences sought by travellers, and identify growth opportunities;
- Identify motivators and barriers for travel to Canada; and,
- Determine the influence of various information sources on destination selection.

The GTW permits direct comparison of Canada to competing destinations in each market. Destination Canada has designated the following destinations as competitors in the Chinese market: the US, France, Germany, Switzerland, Russia, Australia, Spain, Netherlands, New Zealand, Italy, Sweden, UK, Belgium, and India. The countries included represent 95% of the outbound travel volume to long-haul destinations which are considered direct competitors to Canada (e.g., non-beach destinations).

Methodology

The target population in China was residents aged 18 years and older, who have taken a long-haul pleasure trip outside of East Asia (including China, Hong Kong, Macau, Japan, South Korea, and Taiwan) 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. The regions of Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao and Nanjing were included in this survey and data has been weighted to represent the long-haul travel population within these regions.

Data was gathered from 2,200 respondents in China, including 501 recent visitors to Canada, in July 2017. Results are compared against the previous GTW wave (data gathered in December 2016). In addition, select comparisons are made to the 2017 Pulse Check study conducted in November 2017. The Pulse Check is a shorter version of the GTW study, conducted to monitor movement of key metrics on a more frequent basis.

Throughout the report, statistically significant differences from one wave to the next are denoted by arrows in the charts: green arrows pointing up if the metric has increased and red arrows pointing down if the metric has decreased. Results were also analysed among different segments and demographic cohorts; throughout the report, references are made where there are statistically significant differences compared to the general traveller.

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

JUL

2017

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: **Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Shenyang, Hangzhou, Suzhou, Xian, Qingdao, Nanjing**

Recent visitors to Canada:	**501**
Other travellers:	**1,699**
Total sample size:	**2,200**

Seasonality

Fielding for the 2017 GTW study was conducted in July, which is different from 2016 timing (December), but consistent with timing for years before 2016. A Pulse Check study was conducted in November 2017, which allows comparison of key metrics across three waves to determine whether seasonality of survey fielding is a factor in results.

There is some variation to note in key metrics across the three waves. Unaided consideration of Canada increased significantly to 10% in the 2017 GTW, but returned to 4% in the Pulse Check. Similarly, the proportion actively planning a trip to Canada increased significantly in the 2017 GTW to 34%, but dropped in the Pulse Check. Past visitation to Canada saw a similar pattern – rising significantly to 51% in the 2017 GTW, but dropping to 42% in the Pulse Check. The fact that three metrics rose significantly in the 2017 GTW suggests seasonality of survey fielding does affect results for Canada in the Chinese market.

Key Metrics Tracking

	Pulse Check 2017 (November 2017) *(n=500)*	**GTW 2017 (July 2017)** *(n=2200)*	**GTW 2016 (December 2016)** *(n=2204)*
Unaided Consideration of Canada	**4%** ▼	**10%** ▲	**4%**
Aided Consideration – Canada	**41%**	**36%**	**36%**
Destination Knowledge (Top2Box) – Canada *(Among those considering Canada)*	*(n=237)* **32%**	*(n=1100)* **33%**	*(n=961)* **28%**
Actively Planning a Trip to Canada	**31%**	**34%** ▲	**29%**
Past Visitation to Canada	**42%** ▼	**51%** ▲	**46%**

▲ / ▼ *Significantly higher/lower than previous wave.*

Background

China is the second largest economy in the world according to the IMF GDP Nominal ranking, with 14.9% share of global GDP *(International Monetary Fund, October 2017)*.

At the time of data collection, the US presidential administration was nearly six months into its current term and tensions between the US and China were begin to arise. While the two countries' economies remain interdependent, issues at the political level are becoming more divergent, which could have a negative impact on the economic outlook for both countries *(Geopolitical Futures, July 2017)*.

China's GDP growth remains strong by international standards. Although annual growth slowed in 2016, the Chinese economy accelerated over the course of the year and into early 2017, when it rose 6.9%. The forecast for 2017 was revised upwards to 6.8%, and growth was expected to decline only modestly in 2018 to 6.5% *(International Monetary Fund, October 2017)*.

Many economists remain concerned about China's financial system and continuing infrastructure investment. Some analysts focus on signs of strength in China's consumer and service sectors, suggesting a long-awaited shift to becoming a consumer-driven economy. Others point to indications that official Chinese figures may be implausibly high. The country's future remains a large risk for the global economy *(Deloitte, 2nd Quarter 2017 Report)*.

China's unemployment rate was 4% at the end of June 2017 *(International Monetary Fund, October 2017)* and is expected to remain stable for the rest of the year. In 2016, 13.1 million jobs were added and another 7.4 million were added by the mid-year mark of 2017 (*Ministry of Human Resources and Social Security, July 2017).*

At the time of data collection, inflation had risen slightly in recent months, but was still below the long-term average. Inflation was at 1.4% in July 2017, matching what market analysts had expected. Consumer prices rose 0.1% in July 2017 *(Focus Economics, July 2017)*.

China's consumer confidence index stood at 67.1 points in July 2017 (+2.1 since January) – the highest globally, and well above the global average of 48.7 *(Thomson Reuters/Ipsos Primary Consumer Sentiment Index, July 2017).*

Outbound travel from China has grown at a double-digit pace in the past decade, reaching record numbers in 2016. China has been the world's largest outbound travel market since 2012 (*China Travel News, February 2017)*. Chinese residents took 135 million trips abroad in 2016 and spending increased 12% to $261 billion US (*United Nations World Tourism Organization, April 2017*). Along with increased affluence of Chinese citizens, the easing of visa restrictions around the globe has helped fuel the massive growth of Chinese international travellers. By January 2017, China had signed visa exemption and visa-on-arrival agreements with 61 countries *(China National Tourism Administration)*. While outbound expenditure is expected to increase substantially in 2017, it is expected to be at a more modest pace than the past five years (*World Travel and Tourism Council, March 2017*). China alone accounts for one-quarter of all international tourism expenditure despite just 8.7% of Chinese citizens holding a passport. This suggests that room for growth in the country is still significant *(Skift Research, Key Emerging Outbound Travel Markets, 2017)*.

Market Potential

HIGHLIGHTS

- ✓ *The immediate potential market has increased from the previous year: 10.93 million travellers are definitely or very likely to visit Canada in the next 2 years, up from 10.30 million in 2016.*
- ✓ *Interest in BC dropped significantly among the Immediate Potential market in 2017 – trending indicates that BC garners more interest when Chinese travellers are surveyed in winter months, which could be due to Chinese travellers' adversity to poor weather and BC's more temperate winters.*
- ✓ *The proportion saying they will spend more on long-haul travel exceeds those who say they will spend less, resulting in a long-haul outlook of +25 in 2017, up significantly from +17 in 2016.*

GTW data is used to estimate the size of the potential market for Canada. The table below provides an estimate of the size of the potential Chinese market for Canada in two ways – the macro target market and the immediate potential market.

The long-haul travel market size is derived from a 2014 omnibus study of the Chinese adult population. Long-haul travel incidence is comprised of travellers who indicate that they have travelled for a long-haul pleasure trip in the past three years, or intend to do so in the next two years.

The proportion of GTW respondents who are in the dream to purchase stages for Canada (81%, versus 82% in 2016) is used to calculate a target market estimate of 16.34 million.

The immediate potential is a more conservative estimate based on GTW respondents who say they are definitely or very likely to visit Canada in the next two years (67%, up significantly from 62% in 2016). This translates into a market of 10.93 million travellers with more immediate potential for conversion (up from 10.30 million in 2016). Results from the November 2017 Pulse Check wave suggests that seasonality of survey field timing has an effect on interest levels among Chinese travellers, with more travellers being interested in Canada when surveyed during the summer period.

Among Destination Canada's ten international markets, China is ranked 2nd in immediate potential market size (behind the US). However, actual visitation from China was ranked 3rd among Destination Canada's international markets in 2017[1]. This suggests that Canada could be doing more to convert potential travellers to actual travellers in the Chinese market.

For context, Canada attracted 682,000 visitors from China in 2017, up 12% from 2016[2]. The 682,000 arrivals represent 6% of the immediate potential market.

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1 *Destination Canada, Tourism Snapshot, December 2017.*

2 *Destination Canada, Tourism Snapshot, December 2016 & December 2017.*

Size of Potential Market to Canada (Next 2 Years)

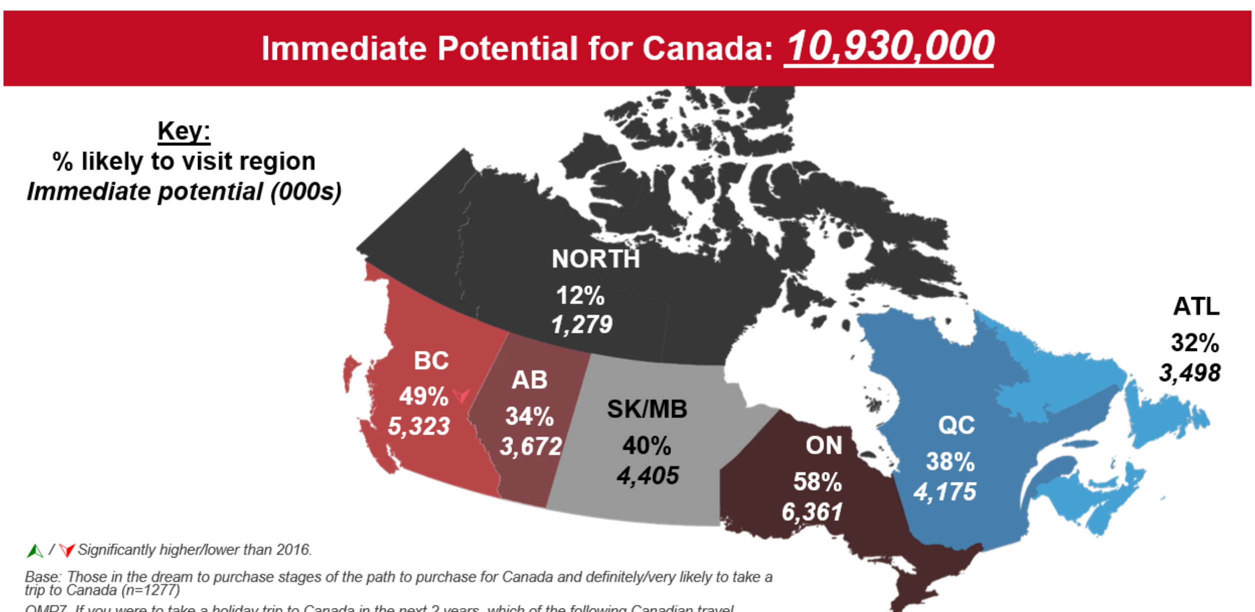
Measure	Size of Potential Market to Canada
Long-haul pleasure travel market	**20.12 million**
Target market for Canada (dream to purchase stage)	**81%**
Size of the target market	**16.34 million**
Immediate potential for Canada (definitely/very likely to visit in next 2 years)	**67%** ▲
Immediate potential	**10.93 million**

▲ / ▼ Significantly higher/lower than 2016.

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=1843)
QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
QMP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Also of note is the demonstrated interest in Canada's regions among the Immediate Potential market (10.93 million). Ontario holds the greatest appeal (58% or 6.36 million potential visitors), with BC declining significantly into 2nd place (49% or 5.32 million, down from 62% in 2016). The Prairies remain in 3rd spot, appealing to 40% of potential visitors (4.41 million) and Quebec appeals to 38% of potential visitors (4.18 million). Results from the November 2017 Pulse Check wave suggest that seasonality of survey field timing has an effect on interest in Canadian destinations. Chinese travellers tend to have stronger interest in BC when surveyed in the winter months. With 'poor weather' also increasing as a barrier during winter survey periods, this suggests that Chinese travellers could be more drawn to BC in the winter for its more temperate climate.

Potential Market Size for the Regions



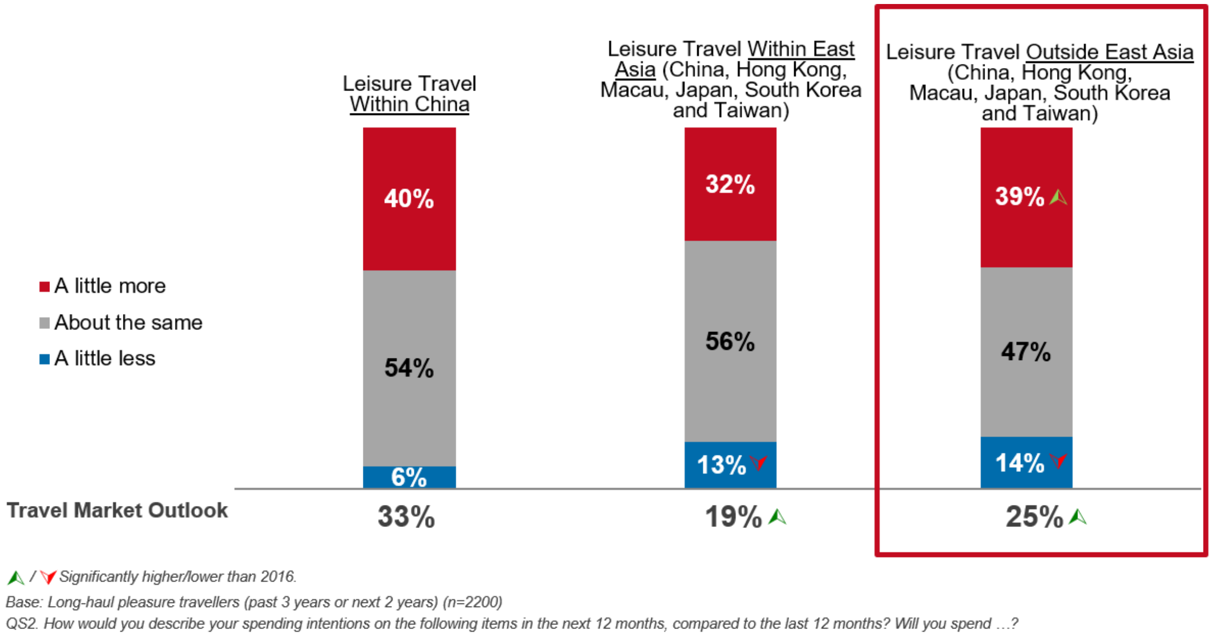
▲ / ▼ Significantly higher/lower than 2016.

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=1277)

QMP7. 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?

The increased affluence of Chinese citizens and the easing of visa restrictions around the globe has strengthened long-haul travel intentions. The proportion of Chinese travellers saying they will spend more on long-haul travel continues to exceed those who say they will spend less, resulting in a significantly improved long-haul outlook of +25 in 2017 (up from +17 in 2016). The short-haul travel outlook also increased significantly from +16 in 2016 to +19 in 2017. Consequently, Chinese travellers indicate decreased spending intentions on travel within their country (outlook of +33 versus +36 in 2016).

Spending Intentions (in the Next 12 Months)



Competitive Environment – Key Performance Indicators Summary

HIGHLIGHTS

- ✓ *Unaided consideration, destination knowledge, and past visitation to Canada all increased significantly in 2017.*
- ✓ *Aided consideration of Australia and the US dropped significantly in 2017. This could be an opportunity for other destinations, including Canada, to capitalize on.*
- ✓ *Data suggests that Chinese travellers are thinking more about shorter-haul trips in the winter and longer-haul in the summer.*

The GTW tracks the following Key Performance Indicators (KPIs) for Canada: unaided and aided destination consideration, aided destination knowledge, and past visitation. Canada's performance is tracked against key competitors for the long-haul travel market. For China, these destinations are the US, New Zealand, France, Switzerland, Australia, Italy, the UK, Germany, Spain, Sweden, the Netherlands, Russia, India, and Belgium.

The outlook for Canada in China remains favourable. Out of the 15 competitive long-haul destinations that respondents were asked to evaluate, Canada is 1st on aided consideration, 4th on unaided consideration, and 7th on destination knowledge (behind the US, Russia, France, Australia, the UK, and Germany).

Consideration

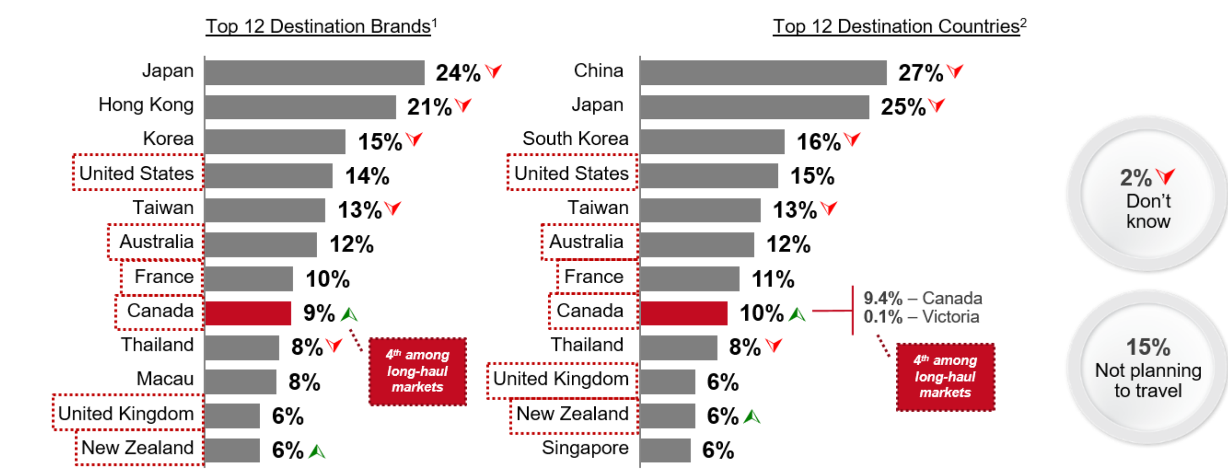
Unaided consideration represents top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. Unaided consideration indicates that a strong impression has rooted in the mind of a traveller for a destination. From a marketing perspective, travellers who have Canada on their unaided consideration list may be easier to attract since they are actively thinking of Canada as a travel destination.

It is important to note that even though respondents are asked name long-haul destinations that they would consider visiting on an unaided basis, many respondents still mention China and other short-haul destinations. This could speak to the fact that many Chinese travellers are very domestic and short-haul focused when thinking of travel destinations, and could represent a challenge for convincing Chinese travellers to go further abroad.

On an unaided basis, 10% of Chinese travellers mentioned Canada as a destination under serious consideration in the next 2 years, trailing the US (15%), Australia (12%), and France (11%). Canada's unaided consideration result is a significant change from 4% in 2016, to 10% in 2017. However, results from the November 2017 Pulse Check wave suggests that seasonality of survey field timing has an effect on unaided consideration levels among Chinese travellers, with more travellers mentioning Canada top-of-mind when surveyed during the summer period. It is also noteworthy that unaided consideration levels for Asian countries (China, Japan, Taiwan and Thailand), follow an opposite pattern, where levels decrease significantly in the summer period and return to previous winter results. This suggests that Chinese travellers are thinking more about shorter-haul trips in the winter and longer-haul in the summer.

Those who have visited Canada recently remain more likely to mention Canada on an unaided basis (35%). Very few specific places in Canada were mentioned by Chinese long-haul travellers, with the majority just saying Canada, suggesting knowledge of specific Canadian destinations remains low.

Unaided Long-Haul Destination Consideration (Next 2 Years)



/ Significantly higher/lower than 2016.

Note: [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).

Long-haul markets

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

QS8. 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 consideration represents the proportion of travellers who say they would seriously consider visiting a destination, but only after they are prompted with a list of competitive destinations. Travellers who have aided consideration for Canada may not be thinking of Canada top-of-mind, but they are considering a visit. Continued prompts and cues through marketing efforts could help move these considerers down the path-to-purchase. On an aided basis, 36% percent say they are seriously considering Canada for a leisure trip in the next 2 years, unchanged from 2016. Canada remains in 1st place, ahead of Australia (30%), the US (28%), and France (27%). Of note, while Canada's result remained stable, aided consideration of Australia (down 3%) and the US (down 4%) fell significantly in 2017.

On an aided basis, males tend to express stronger interest than females in Canada, as well as in Australia and the US. Recent visitors to Canada also express stronger consideration (69%). Knowing that past visitors are more interested in returning, it is important to attract new visitors to grow the pool of potential repeat visitors.

Canada is ranked 1st in aided consideration and 4th in unaided consideration – clearly, there is greater consideration when Chinese travellers are reminded of Canada as a potential destination. Given the stronger position when prompted, continuous marketing efforts could help Canada take advantage of the favourable sentiment to remain more top-of-mind.

Knowledge

Aided destination knowledge measures knowledge of travel opportunities in each destination among those with that destination in their consideration set. Twenty-five percent of all Chinese long-haul travellers rate their knowledge of travel opportunities in Canada as either excellent or very good, up significantly from 19% in 2016. Among those considering Canada, destination knowledge stands at 33% (versus 28% in 2016), boosting Canada to 7th spot, behind the US (46%), Russia (37%), France (36%), Australia (35%), the UK (35%), and Germany (34%). Given the large number of potential Chinese visitors in the next 2 years, efforts to increase knowledge of Canadian travel opportunities could help to move these potential visitors along the path-to-purchase.

Visitation

In terms of past visitation, 51% of Chinese long-haul travellers indicate that they have visited Canada on a leisure trip at some point in their lifetime, a significant increase from 46% in 2016. Older travellers aged 55+ (59%) are most likely to have visited previously. Messaging designed to encourage a repeat visit is recommended since past visitors to Canada voice considerably higher interest in returning.

Key Performance Indicators

Indicator	Definition	All Long-Haul Travellers (n=2200)	Recent Visitors to Canada[1] (n=501)	Considering Canada[2] (n=1403)
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[3]	10% ▲	35% ▲	15% ▲
Competitive positioning on destination consideration	Rank on the consideration list among 15 destinations	1	1	1
Destination knowledge:				
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	25% ▲	52%	33% ▲
Past visitation:				
Past visitation	% who have ever visited Canada for pleasure	51% ▲	99%	62% ▲

▲ / ▼ Significantly higher/lower than 2016.

1 Visited Canada in the past 3 years (pleasure trip of 4 or more nights, with at least 1 night in paid accommodations).
2 Those in the consider to purchase stages of the path to purchase for Canada.
3 For trips in the next 2 years.

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

QS8. 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.)
QBVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years?
QMP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations (asked only for destinations in consideration set)?
QRT14a. Approximately, how many times have you been to Canada?

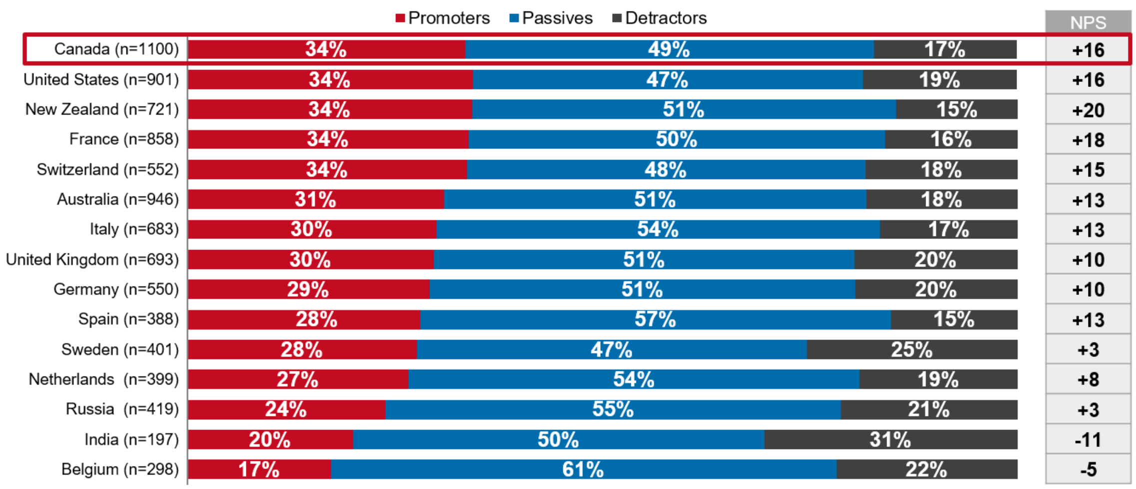
Net Promoter Score (NPS)

The Net Promoter Score (NPS) measure was added in 2017 (previously asked in 2015). NPS measures the likelihood of travellers to recommend a destination. Results are gathered among travellers for each destination in their consideration set (have visited previously and/or considering a visit). The measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating). Passives are those who provided a rating of 7-8.

New Zealand achieves the highest NPS result among Chinese travellers (+20), followed closely by France (+18). Canada and the US are tied with a NPS result of +16, while Switzerland trails slightly with a score of +15. All five countries with the top NPS scores have the same percentage of Promoters (34%), while New Zealand has the fewest number of Detractors (15%).

When the results for Canada are examined among recent visitors, the score increases slightly to +19.

Net Promoter Score



+ New question added in 2017 – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering visiting each country
+QMP11. Whether you have visited or not, how likely are you to recommend each of the following destinations to a friend, family member or colleague?

Path-to-Purchase

HIGHLIGHTS

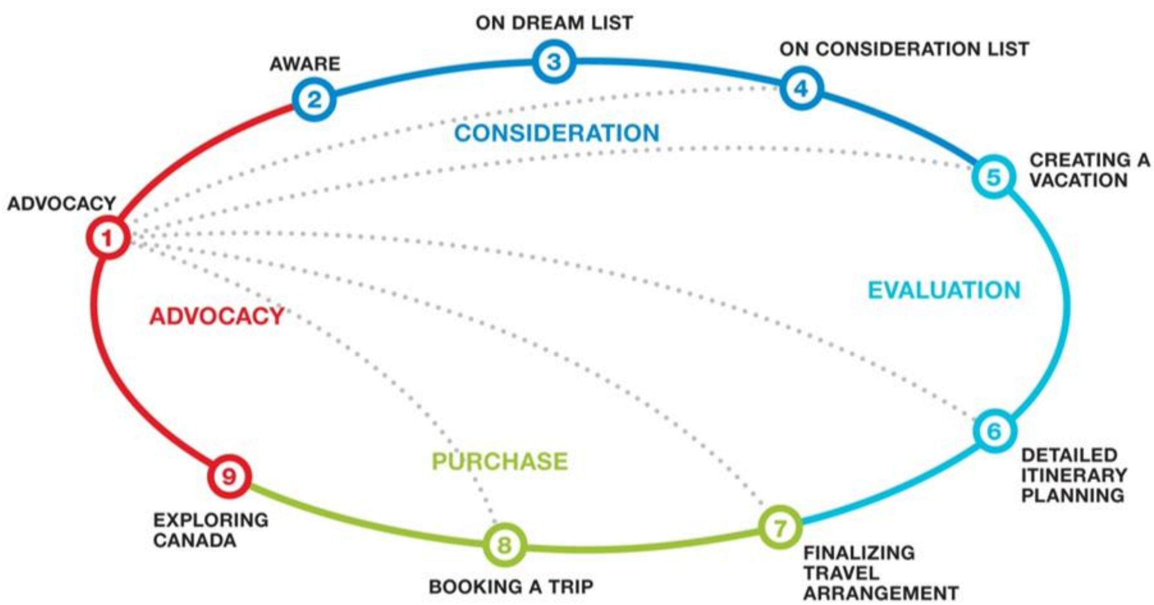
- ✓ *Long-haul travellers indicated significantly increased active planning for trips to Canada in 2017. Canada has moved ahead of the US and is second to Australia.*
- ✓ *Younger travellers aged 18-34 and those 55+ are more likely to be actively planning a trip to Canada than those 35-44.*
- ✓ *Additional focus could be placed on moving travellers from the creating a vacation movie phase to detailed itinerary planning, where conversion is weakest.*

Like any other expensive and discretionary consumer product, 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.

The final stage, advocacy, happens during and after the actual visit.

Destination Canada wants to understand where the organization can have the greatest influence in converting those with interest in Canada to actual visitors.

Destination Canada's Path-to-Purchase Model



In addition to looking at individual stages of the P2P, Destination Canada has identified phases travellers move through in the purchase cycle. Key phases are defined below and are referenced throughout this report.

Destination Canada's Path-to-Purchase Model

Unaware	Have never thought of taking a trip to this destination
Aware	Not interested in visiting/returning in the foreseeable future
On Dream List	Dreaming about visiting/returning someday
On Consideration List	Seriously considering visiting/ returning in the next 2 years
Creating a Vacation Movie	Have started to gather some travel information for a trip to this country
Detailed Itinerary Planning	Am planning the itinerary for a trip to this country
Finalizing Travel Arrangements	Am currently making transportation and accommodation arrangements
Booking a Trip	Have already booked my transportation and accommodations

Dream to Purchase

Consider to Purchase

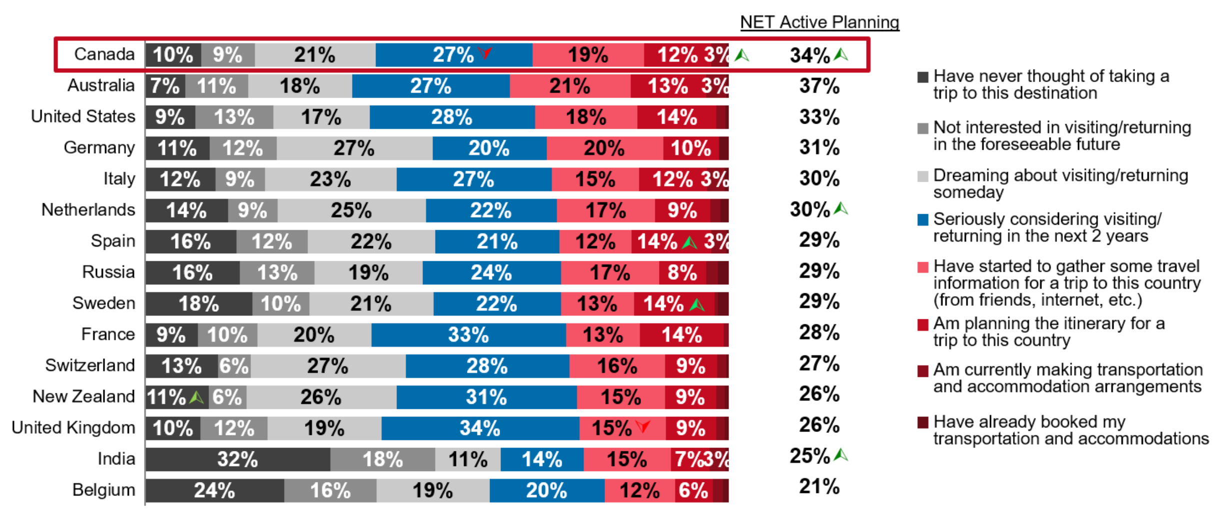
Active Planning

The results have shifted since 2016 for some top-ranking destinations. Australia has taken the lead, with 37% of Chinese long-haul travellers actively engaged in planning a visit, and an additional 27% seriously considering a trip. Canada has moved ahead of the US into 2nd place, with a significant increase in the proportion of Chinese long-haul travellers actively engaged in planning a visit (34%, up from 29% in 2016). Most notably, there is a significant increase in the proportion making transportation and booking arrangements (3%, up from 1% previously). As more Chinese travellers indicate being further along in the purchasing cycle for Canada, there is a corresponding significant decline in the proportion seriously considering a trip to Canada (27%, down from 30% previously). Younger travellers aged 18-34 (35%) and those 55+ (38%) are more likely to be actively planning a trip to Canada than those aged 35-44 (28%). Results from the November 2017 Pulse Check wave suggest that seasonality of survey field timing does not have an effect on path-to-purchase measures for Canada among Chinese travellers. Any significant shifts between December 2016 and July 2017 results have remained stable in the November 2017 Pulse Check wave.

The US is now in 3rd place, with 33% of Chinese travellers actively planning a trip (versus 37% in 2016) and 28% in the seriously considering stage (versus 34% previously). Some Chinese travellers appear to be losing interest in visiting the US, as 2017 results show slightly more are saying they are not interested in visiting or have never thought of visiting. The downward shifts for the US path-to-purchase are not affected by seasonality, they continue to trend downwards over the three waves of tracking.

There are some shifts to note with other destinations in the competitive set. The Netherlands saw a significant increase in travellers in the active planning stage (30%, up from 21% in 2016), while Spain and Sweden both saw significant increases at the itinerary planning stage (14%, up 7%, respectively). The shifts for Netherlands and Spain do not seem to be affected by seasonality trends, but Sweden's does – itinerary planning for Sweden is higher during the summer survey period compared to the winter periods.

Stage in the Purchase Cycle by Country



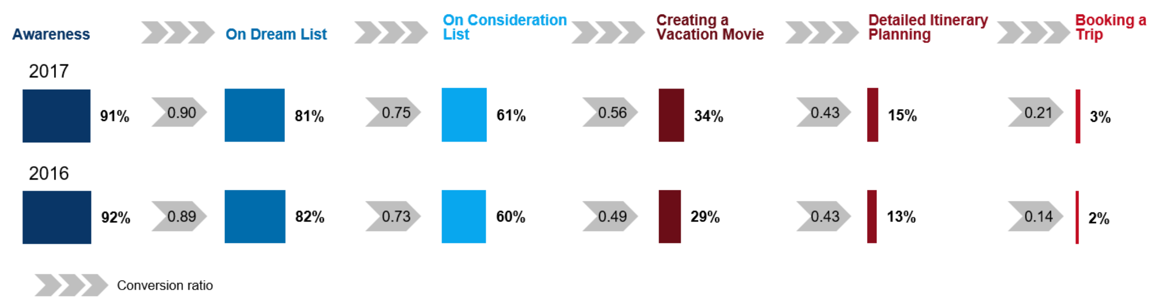
/ Significantly higher/lower than 2016.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected countries from the competitive set (n=varies)
QMP1. Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

Getting travellers to move through the purchase cycle to booking a trip is critical. The charts below show Canada's progress converting travellers at crucial steps in the purchase cycle relative to top competitors (determined by past 3-year visitation) and other destinations in the competitive set. For reference, also shown is the average across the entire competitive set. 'Strong' and 'weak' conversion ratios were derived through statistical analysis; specifically, if a conversion ratio is greater than one standard deviation from the average, then it is considered 'strong' and if a conversion ratio is lower than one standard deviation from the average, then it is marked as 'weak'.

Canada's performance remains average in 2017 across the purchase cycle. While there has been some modest improvement in 2017, Canada's performance is weakest, comparatively to other top destinations, at converting travellers from creating a vacation movie to the detailed itinerary planning phase. This could be a potential area of focus for Canada. At the detailed itinerary planning stage, travellers are primarily self-motivating and will explore the many sources available to build their dream trip; they seek authenticity and real-life experiences in their search for advice.

Chinese travellers who are currently in the itinerary planning stage for Canada cite the following as the top sources of information that helped them plan their trip: brochures from travel agency/tour operator (35%), friends and family, in person (32%), TV programs (31%), films featuring the destination (27%), and travel guidebooks (26%).

Path-to-Purchase Conversion – Canada



New Zealand is the best at getting on travellers' dream list and. Australia and the US excel at getting on travellers' consideration list. France recorded below average results (along with the UK and New Zealand) at the creating a movie stage, but above average results at the detailed itinerary planning stage.

At the final stage, booking a trip, Australia is the most successful at converting prospective visitors into actual visitors with a 4% conversion rate (versus 1% previously). Canada is 2nd with a 3% conversion rate (up from 2% in 2016), while the US has dropped below the average, converting 2% of Chinese travellers into actual visitors (down from 5% previously).

For context, the US recorded 2.97 million arrivals from China in 2016 and preliminary results to September 2017 shows a 5.8% decrease in visits. In contrast, Australia saw 1.36 million arrivals in 2017 (up 12% over 2016), while Canada welcomed 682,000 (up 12%), New Zealand attracted 436,000 (up 8%), and the UK saw 268,000 arrivals through September 2017, up 33% over 2016. There are no 2017 results available for France, but it is a popular destination for Chinese travellers recording 2 million visits in 2016.[3]

[3] *Destination Canada, US National Travel & Tourism Office,* Direction générale des entreprises (France),*Tourism Australia, Tourism New Zealand, Visit Britain.*

Path-to-Purchase Conversion – Top Competitors

	Awareness		On Dream List		On Consideration List		Creating a Vacation Movie		Detailed Itinerary Planning		Booking a Trip
Canada	91%	0.90	81%	0.75	61%	0.56	34%	0.43	15%	0.21	3%
Australia	93%	0.89	83%	0.78	65%	0.58	38%	0.45	17%	0.23	4%
United States	91%	0.85	78%	0.79	62%	0.54	33%	0.47	16%	0.13	2%
France	91%	0.89	81%	0.76	61%	0.46	28%	0.54	15%	0.06	1%
United Kingdom	90%	0.87	79%	0.75	60%	0.43	26%	0.42	11%	0.19	2%
New Zealand	89%	0.93	83%	0.69	57%	0.46	26%	0.42	11%	0.20	2%
Average Among Competitive Set	*86%*	*0.87*	*75%*	*0.72*	*54%*	*0.54*	*29%*	*0.46*		*0.20*	*3%*

Conversion ratio — Weak — Strong
Identified through statistical analysis

Examining purchase cycle results for destinations visited less frequently by Chinese travellers is also illuminating. Most notably, Russia, Belgium, and India are strong performers at the final stage this year, seeing above average conversion ratios between detailed itinerary planning and actual booking.

Path-to-Purchase Conversion – Rest of Competitors

	Awareness		On Dream List		On Consideration List		Creating a Vacation Movie		Detailed Itinerary Planning		Booking a Trip
Canada	91%	0.90	81%	0.75	61%	0.56	34%	0.43	15%	0.21	3%
Germany	89%	0.87	78%	0.65	51%	0.62	31%	0.36	11%	0.15	2%
Italy	88%	0.90	80%	0.72	57%	0.53	30%	0.51	15%	0.25	4%
Switzerland	88%	0.94	82%	0.68	55%	0.49	27%	0.40	11%	0.18	2%
Netherlands	86%	0.90	77%	0.67	52%	0.57	30%	0.43	13%	0.25	3%
Spain	85%	0.85	72%	0.70	50%	0.58	29%	0.58	17%	0.18	3%
Russia	84%	0.85	71%	0.74	53%	0.55	29%	0.41	12%	0.33	4%
Sweden	82%	0.88	72%	0.70	51%	0.57	29%	0.57	16%	0.15	2%
Belgium	76%	0.79	60%	0.68	41%	0.52	21%	0.43	9%	0.30	3%
India	68%	0.74	50%	0.78	39%	0.64	25%	0.40	10%	0.33	3%
Average Among Competitive Set	*86%*	*0.87*	*75%*	*0.72*	*54%*	*0.54*	*29%*	*0.46*	*13%*	*0.20*	*3%*

Conversion ratio — Weak — Strong
Identified through statistical analysis

Destinations

HIGHLIGHTS

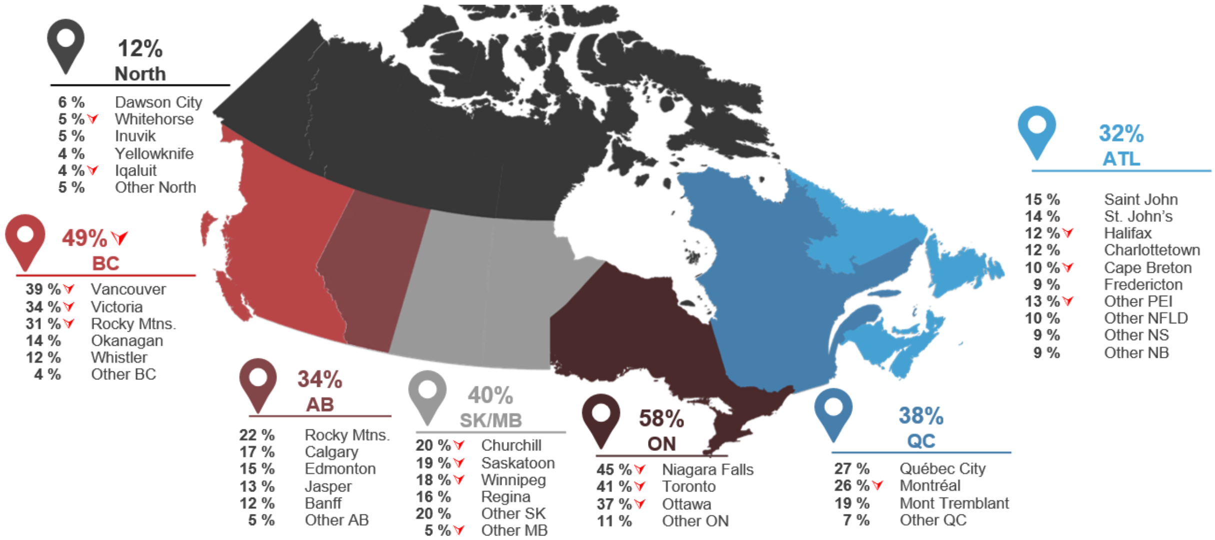
- ✓ *Ontario edges BC as the most popular province among prospective visitors, with Niagara Falls having the greatest appeal by far.*
- ✓ *Interest in BC is down significantly (dropping from 62% to 49%); interest is also down for Vancouver (39% from 55%), Victoria (34% from 46%), and the BC Rockies (31%, down from 44%). Trending indicates that BC garners more interest when Chinese travellers are surveyed in winter months, which could be due to Chinese travellers' adversity to poor weather and BC's more temperate winters.*

Chinese travellers in the dream-to-purchase stages and indicating they are definitely/very likely to visit Canada in the next 2 years were asked which parts of the country they would likely visit. Results have shifted since 2016, with Ontario (58%) surpassing BC (49%) as the most popular province. Interest in BC is down significantly in 2017 (down from 62% in 2016). Results from the November 2017 Pulse Check wave suggest that seasonality of survey field timing has an effect on interest in Canadian destinations. Chinese travellers tend to have stronger interest in BC when surveyed in the winter months. With 'poor weather' also increasing as a barrier during winter survey periods, this suggests that Chinese travellers could be more drawn to BC in the winter for its more temperate climate.

The top destinations of interest to Chinese visitors are all located within the two most popular provinces – Ontario and BC. While there is little change in the top destinations, all recorded significant drops in mentions in 2017. Niagara Falls remains the most mentioned destination, yet interest in down significantly (45%, down from 51%). Toronto has surpassed Vancouver for 2nd spot, but interest is also down significantly (41%, down from 48%). Vancouver falls to 3rd spot (39%, down significantly from 55%), while Ottawa (37%, down from 44%) has moved ahead of Victoria (34%, down from 46%). Interestingly, the BC Rocky Mountains saw a significant drop (31%, down from 44%) while the Alberta Rockies saw a slight uptick (25%, up from 22%). Other large cities also saw significant drops in 2017 including Montreal (26% versus 31%), Saskatoon (19%, down from 27%), Winnipeg (18% versus 25%), and Halifax (12%, down from 16%).

The significant decreases in 2017 on interest for Canadian destinations is not a point of concern since many of these declines reverse in the November 2017 Pulse Check wave. Chinese travellers who are likely to visit Canada in the next 2 years seem to consider a larger number of destinations when surveyed in the winter months and are more honed in on a lesser number of destinations when surveyed in the summer. Destination Canada will continue to monitor to identify possible causes for this irregularity.

Canadian Destinations Likely to Visit (Among those definitely/very likely to visit)



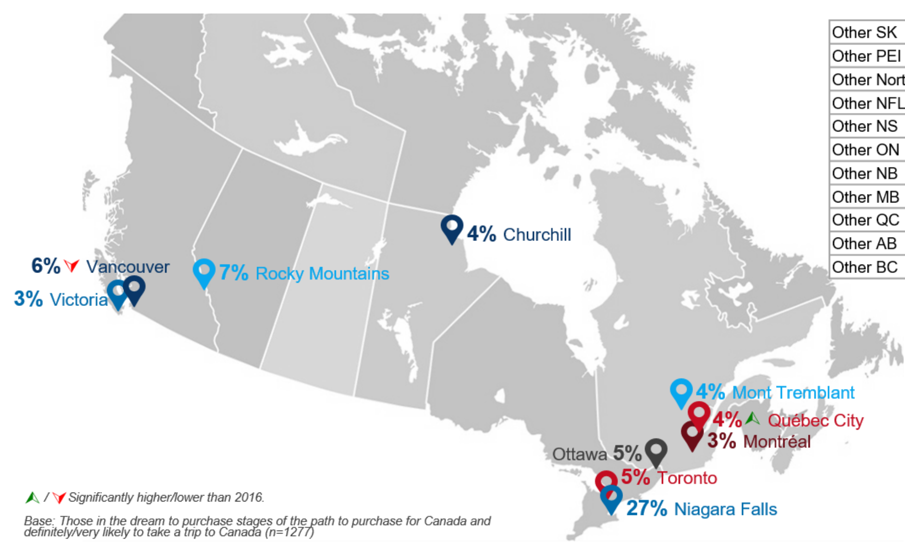
▲ / ▼ *Significantly higher/lower than 2016.*

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=1277)

QMP7. 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?
QMP7a-g. Within [province/region], which travel destinations are you likely to visit?

An additional question asked potential visitors to identify the one Canadian destination holding the greatest appeal. Overall, Niagara Falls continues to lead all other destinations, with 27% naming it as the most appealing destination. The Rocky Mountains were selected by 7% of prospective visitors, narrowly outperforming the most frequently mentioned cities – Vancouver (6%, down significantly from 11% in 2016), Toronto (5%), and Ottawa (5%). Results suggest Canada's landscape-based icons (Niagara Falls and the Rocky Mountains) still hold greater appeal for Chinese travellers than city destinations, and is consistent with the low level of knowledge Chinese travellers generally have of Canadian vacation opportunities.

Most Appealing Canadian Destination – Top 10 Mentions



Other SK	3.6% ▲
Other PEI	2.2%
Other North	1.5%
Other NFLD	1.0%
Other NS	0.9% ▲
Other ON	0.9%
Other NB	0.6%
Other MB	0.5%
Other QC	0.5%
Other AB	0.2%
Other BC	0.1%

Calgary	2.6% ▲
Jasper	2.1% ▲
Saint John	1.9%
Edmonton	1.7%
Okanagan	1.6%
Halifax	1.6%
Banff	1.4%
Charlottetown	1.3%
Cape Breton	1.2%
Fredericton	1.1%
Regina	1.0%
Saskatoon	0.8%
St. John's	0.8%
Winnipeg	0.7%
Iqaluit	0.5%
Dawson City	0.3%
Inuvik	0.2%

▲ / ▼ *Significantly higher/lower than 2016.*

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=1277)

QMP8. And, which place in Canada most appeals to you?

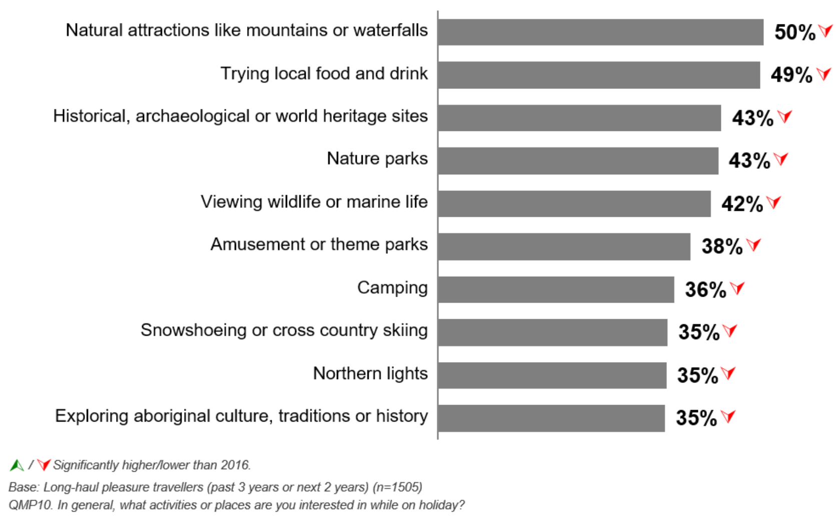
Vacation Activities

HIGHLIGHTS

- ✓ *While the top activities are largely consistent year-over year, interest levels are down significantly across the board.*
- ✓ *Natural attractions, historic sites, wildlife viewing, and local food & drink are the top trip anchor activities for Chinese travellers.*
- ✓ *Popular activities that Canada could better promote to Chinese travellers: Northern lights, fall colours, camping, and snowshoeing/cross country skiing.*

Chinese travellers were asked about which activities and experiences they seek while on holidays in general, regardless of the destination. The top activities results are similar to 2016 with the exception of Aboriginal culture, which replaces hiking or walking in nature in 10th spot. While the top activities are largely consistent, interest levels are down significantly across the board. Despite a significant decline, the chance to see natural attractions like mountains and waterfalls (50%, down from 60%) and the opportunity to sample local cuisine (49%, down from 60%), remain the most sought-after holiday experiences. This is followed by historic sites, visiting parks, viewing wildlife, and amusement parks. Apart from Aboriginal culture, which holds equal appeal across age groups, the top activities all hold stronger than average appeal for Destination Canada's target age groups of travellers aged 35-44.

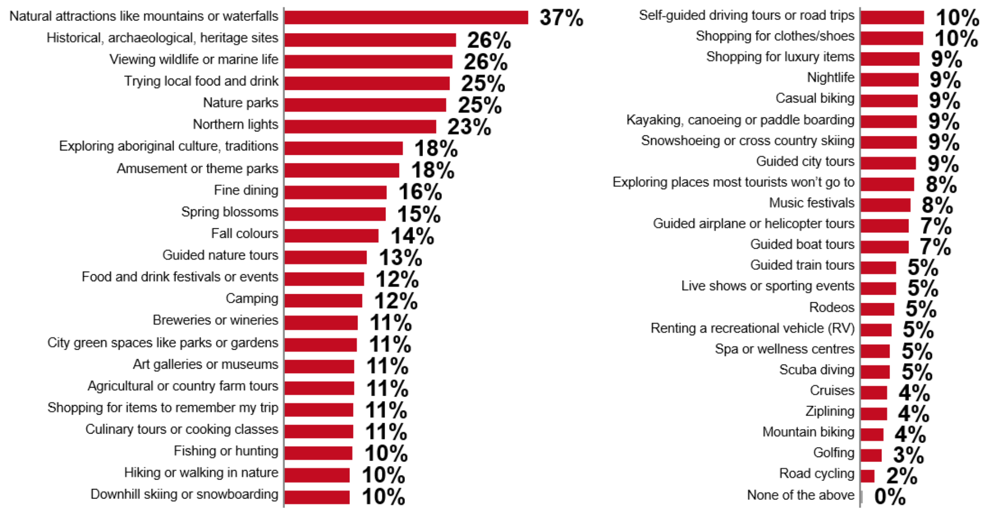
General Activities/Places Interested In – Top 10



Trip Anchor Activities

A new question added in 2017 asked Chinese travellers which vacation activities are important enough that they would base an entire trip around them. Natural attractions (37%), historical sites (26%), wildlife viewing (26%), trying local food & drink (25%) and nature parks (25%) are the top trip anchor activities. All of these are also among the top activities of interest among Chinese travellers. Given that Chinese travellers are willing to anchor a trip around these activities, focus could be placed on messaging about their availability in Canada. These anchors are particularly important to highlight at the creating a vacation movie stage of the path-to-purchase since travellers are looking to build a framework around what their trip could look like.

Trip Anchor Activities



+ New question added in 2017 – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=2198)
+QMP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity?

Activities of Interest & Participation in Canada

Another new question added in 2017 looks at participation in activities among recent visitors to Canada. Actual participation data is presented in tandem with general vacation interests to identify any gaps. The activities are grouped into "Popular" activities (those with above average interest among all activities) and "Niche" activities (those with below average interest.) Gaps in participation are identified by calculating the proportion of recent visitors who participated in an activity versus general interest in an activity. Activities with below average participation are highlighted to indicate the largest gaps. In China's case, actual participation is higher than general interest for many activities – to account for this, the average is calculated only among those activities with actual participation gaps (participation rates under 1.0).

Generally, Chinese travellers indicate very high participation rates for many of the niche activities, this could indicate that they are pursuing many specific interests during their trips to Canada. Among the most popular activities, participation rates are somewhat lower but still indicate that a large proportion of Chinese travellers are engaging in widely available activities such as seeing natural attractions, trying local food and drink, historic sites, and nature parks. Activities where participation is higher than general interest (participation rates over 1.0), indicate that Canada is doing well at delivering on the activity. Travellers could be fulfilling their stated activity interests, or travellers could be opportunistic when coming across activities in destination – either way, the activities are accessible to visitors from this market.

Among popular activities for Chinese travellers, participation gaps are most pronounced for:

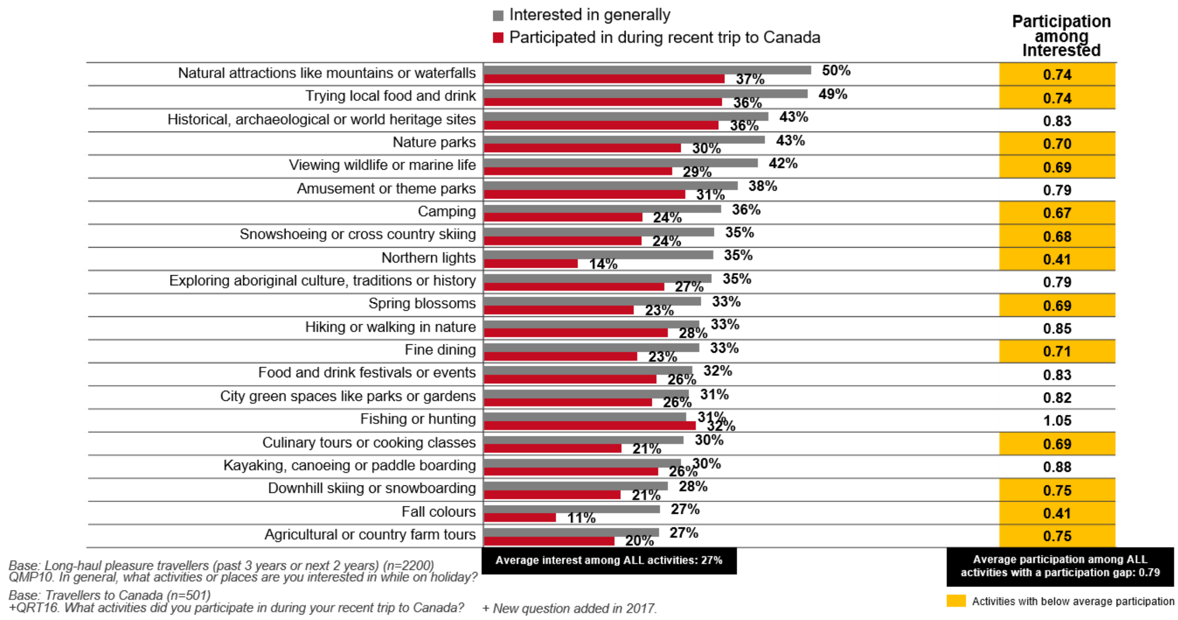
- Northern lights
- Fall colours
- Camping
- Snowshoeing or cross country skiing

There is an opportunity for the Canadian tourism industry to either further develop or more clearly communicate offerings in these areas since there is evident interest that is going unmet.

Northern lights and fall colour are the activities with the largest gaps. Northern lights is also one of the top activities that Chinese travellers would anchor a trip around. Several communication points could be addressed to increase participation in Northern lights activities among Chinese travellers, including improved messaging on accessibility and differentiation of the Canadian experience compared to European offerings. In addition, product development for fall colours could assist in generating increased demand for shoulder season travel.

Snowshoeing or cross country skiing and camping are among the top activities of interest for Chinese travellers. There is a clear opportunity to better promote snowshoeing and cross country skiing given the wide availability of marketable products. Given high interest in camping, the Canadian tourism industry could consider building the availability of camping and glamping products for Chinese audiences. There is an opportunity to provide more turn-key camping products since equipment is not easily accessible to visitors. While there are some camping products currently available to visitors, more could be done to package camping and glamping with guided tours and outdoor activities.

Popular Activities with Above Average Interest

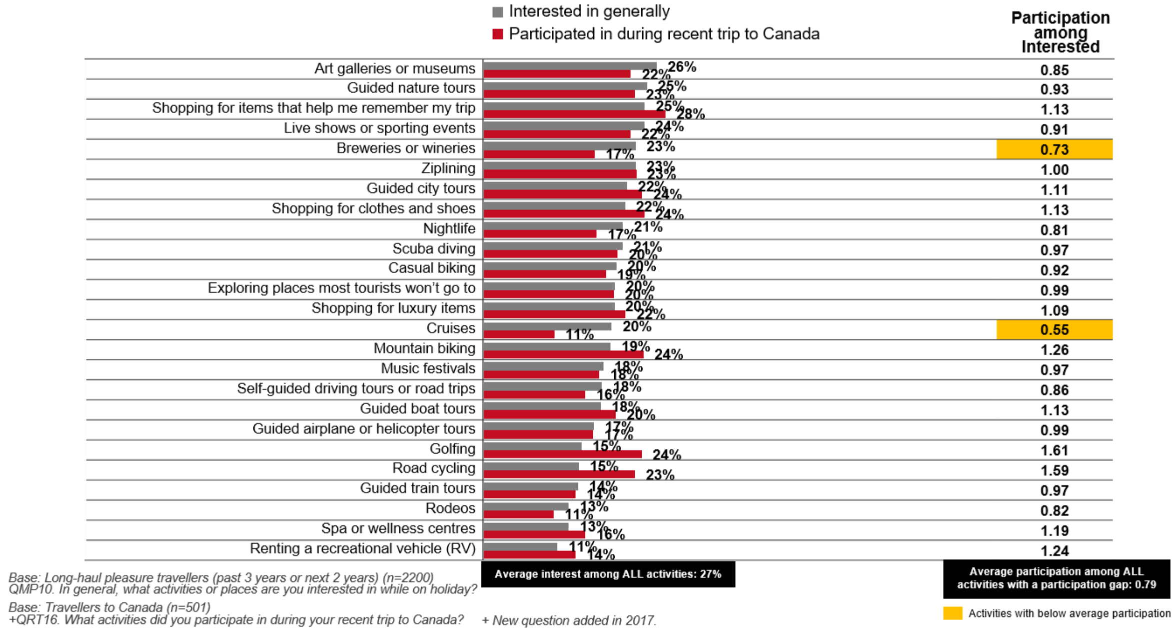


Among the less popular or niche activities, there are some gaps in participation among recent visitors to Canada and general interest. Most notable are niche activities with large gaps in participation and wide availability of marketable products. These activities tend to be on the softer spectrum (as opposed to active) and there is opportunity to better position these activities as add-ons for different types of Chinese travellers.

Soft Activities:

- Cruises
- Breweries or wineries

Niche Activities with Below Average Interest



Barriers

HIGHLIGHTS

- ✓ *Poor weather remains the primary deterrent, but has seen a significant decline in 2017 – however, trending indicates that poor weather is more of a deterrent when Chinese travellers are surveyed in winter months.*
- ✓ *There has been a significant rise among those at the consideration stage saying nothing would prevent them from visiting Canada.*

All Chinese long-haul travellers were asked what could prevent them from visiting Canada. Poor weather remains the primary deterrent, despite a significant decline in mentions since 2016 (31%, down from 36%), followed by safety concerns, not enough time to take a vacation, and cost. Older travellers aged 55+ are less likely to cite weather and time constraints and remain the most likely to say nothing will prevent them from visiting Canada.

Poor weather and safety concerns can be dispelled through messaging and advertising emphasizing a safe Canadian vacation experience that highlights the variety of activities available. Concerns surrounding time constraints might be alleviated by countering the notion that Canadian destinations are too far apart – messaging can focus on the ability to anchor a trip to specific regions/experiences rather than having to see the whole country. Other peripheral reasons such as visa requirements and hassles at borders and airports could be addressed by highlighting the greater number of processing centres available in order to facilitate visa requirements. Emphasizing the increasing availability of direct flights between China and Canada (up 25% over 2016[4]) may also improve perceptions of flights being too long. In fact, Chinese travellers may already be cognizant of this as the proportion seeing flights as too long has dropped significantly this year (16%, down from 18% in 2016). Concerns about a language barrier are also down significantly in 2017 (14%, down from 19% previously).

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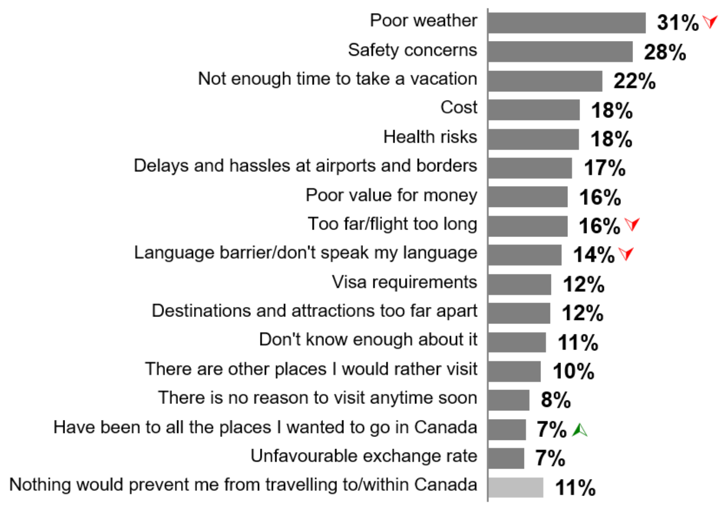
4 *Destination Canada, Tourism Snapshot, December 2017.*

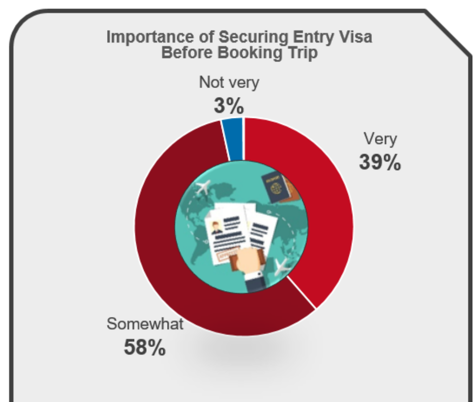
Older travellers aged 55+ may represent the best immediate opportunity as they are least concerned with any of the primary barriers and have the strongest desire to visit Canada. However, they are the most likely to mention that they have been to all the places they want to go in Canada, so it may take some effort to create a sense of urgency to visit. From a lifetime value standpoint, younger travellers may provide a greater pay-off as past visitors to Canada demonstrate greater interest in returning. Attracting younger travellers will also take effort since perceptions about weather, the time required for a vacation, and cost will need to be dispelled. From a strategic marketing viewpoint, Destination Canada could collaborate with partners to split tactical efforts between younger and older travellers to attract as many Chinese travellers as possible.

While poor weather remains the top barrier among those who visited Canada in the past (28%), they are less likely to cite it as a barrier compared to those who have never been (34%). Recent visitors to Canada are also significantly less likely than those who have not visited recently to mention weather (25% vs. 33%), safety concerns (22% vs. 29%), cost (8% vs. 18%), and airport hassles (13% vs. 18%).

An additional question asked respondents about the impact of entry requirements on booking. It appears this is an important consideration for Chinese travellers, with 97% saying securing an entry visa before booking is important. Note this question is not destination specific.

Key Barriers for Visiting Canada





+ New question added in 2017 – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)
+QMP14. If you are thinking about visiting a country where you require an entry visa, how important is it for you to properly secure a visa before you start booking flights, accommodation or other trip components?

/ Significantly higher/lower than 2016.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)
QMP9. Which of the following factors might discourage you from visiting Canada?

Examining barriers at key path-to-purchase stages provides additional insight. Those in the evaluation stage (gathering information or planning a visit) are further along the path-to-purchase than those in the consideration stage. Poor weather, safety concerns, and time required for a vacation remain the top three barriers for those both seriously considering a visit and those at the evaluation stage. Notably, lack of time has declined significantly from 2016 among those seriously considering a visit (20% vs. 26% in 2016).

Chinese travellers at the consideration stage are also significantly less likely to mention the length of flight (12% vs. 16% in 2016) and language barrier (10% vs. 19% in 2016). However, they are significantly more likely to express a desire to visit other places (9%, up from 6% in 2016) and feel they have been to all the places they want to visit in Canada (7% vs. 4% previously). Encouragingly, there has been a significant increase in the proportion saying nothing would prevent them from visiting Canada (18%, up from 11%). They are now more likely to share this sentiment than those in the evaluation phase.

The only change to note among those in the evaluation stage is a significant drop in health-related concerns (18%, down from 23% previously). While primary concerns such as weather and safety dissipate as potential visitors move along the path-to-purchase in 2017, secondary barriers such as language concerns (+5) and distance to travel (+4) intensify.

Key Barriers for Visiting Canada – by Path-to-Purchase Segments

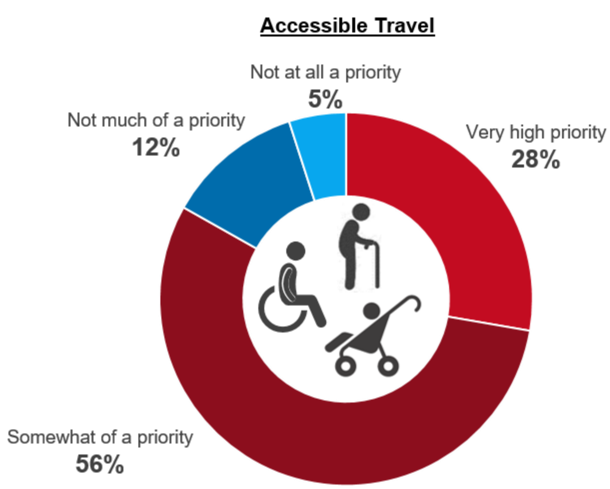
	Consider (n=619)	Evaluation (n=707)	Change between Evaluation and Consider
Poor weather	33%	27%	-6
Safety concerns	31%	25%	-6
Not enough time to take a vacation	20% ▼	21%	+1
Health risks	19%	18% ▼	-1
Delays and hassles at airports and borders	16%	18%	+2
Cost	14%	12%	-2
Too far/flight too long	12% ▼	13%	+1
Poor value for money	11%	14%	+3
Visa requirements	11%	13%	+2
Language barrier/don't speak my language	10% ▼	15%	+5
There are other places I would rather visit	9% ▲	7%	-2
Don't know enough about it	9%	9%	–
Destinations and attractions too far apart	9%	13%	+4
There is no reason to visit anytime soon	7%	8%	+1
Have been to all the places I wanted to go in Canada	7% ▲	10%	+3
Unfavourable exchange rate	6%	8%	+2
Nothing would prevent me from travelling to/within Canada	18% ▲	13%	-5

▲ / ▼ *Significantly higher/lower than 2016.*
Base: Long-haul pleasure travellers in specific path-to-purchase segments
QMP9. Which of the following factors might discourage you from visiting Canada?

Niche Market

An additional question was added for 2017 to size the market for accessible travel. Accessible tourism, which strives to make a destination accessible to everyone, regardless of physical limits, disability, or age, is relevant for 83% of Chinese travellers, with 28% seeing it as a very high priority. Those in the purchase phase for Canada are more likely to see accessibility as a very high priority, which suggests communicating Canada's commitment to accessible tourism could be a draw for Chinese travellers.

Niche Market Sizing



+ New question added in 2017 – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=2200)
+QMP13. Accessible tourism strives to make tourist destinations, products and services accessible to everyone regardless of physical limits, disability or age. How much of a priority is having accessible travel options for you and your companions?

Recent Trip Profile

HIGHLIGHTS

- ✓ *While holidays remain the primary reason for visiting Canada, there has been a significant drop in mentions as other types of trips expand.*

The following section provides details on the most recent long-haul trip taken by Chinese travellers to competitive set destinations in the past 3 years (79% took such a trip). If the most recent trip encompassed more than one destination, the data reflects where the most time was spent.

Trip Purpose

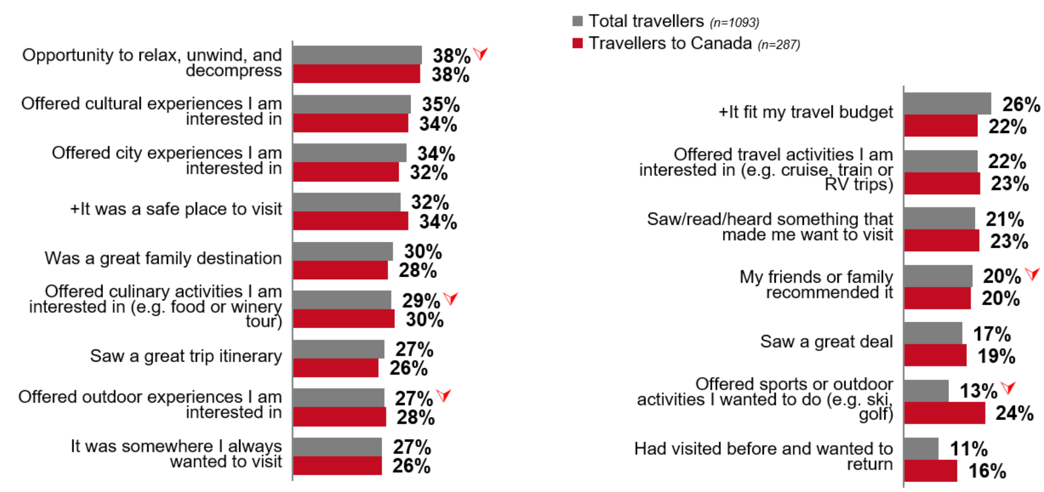
Unchanged from 2016, the primary reason for travelling among all Chinese long-haul travellers was for holiday purposes (cited by 64% of all travellers). While the primary reason for visiting Canada is for holiday purposes, there has been a significant decline in mentions since 2016 (57%, down from 69% in 2016). It is possible that seasonality in survey field timing has an effect on trip purpose given that Chinese New Year normally occurs in January or February; surveys undertaken after this period may be more likely to capture greater proportions who travelled to visit friends and family. Education is up significantly as a trip purpose, but still accounts for a small number of trips (6%).

Motivators

Those travelling for holiday purposes were asked about factors which influenced their choice of destination.

Once again, an opportunity to relax and unwind was the primary reason for choosing the destination, both among travellers generally and visitors to Canada, although there has been a significant drop in mentions among travellers in general (down from 45% in 2016). Among travellers generally, there has been a drop in the importance of culinary activities (29%, down from 36% in 2016), outdoor experiences (27% vs. 33%), personal recommendation (20% vs. 26%), and sports-related activities (13%, down from 19%).

Factors Influencing Destination Selection



+ New response option added in 2017 – no trending.
▲/▼ Significantly higher/lower than 2016.
Base: Long-haul pleasure travellers (past 3 years) travelling for holiday
QRT3. Which of the following factored into your choice of destination for this trip?

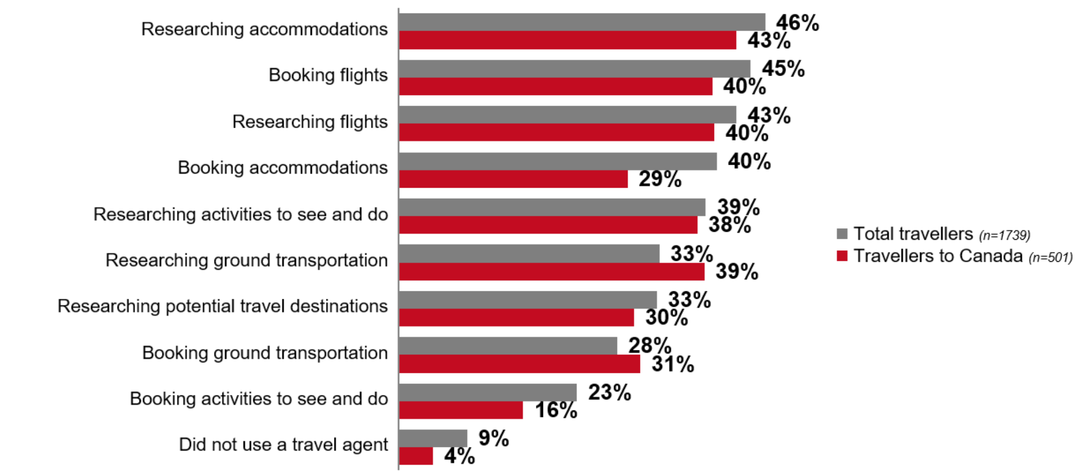
Travel Party

Regardless of destination, Chinese travellers were most likely to be accompanied by their spouse (66%) which is in line with 2016. Significantly fewer travel parties contained children under the age of 18 in 2017 (18%, down from 21% in 2016). Travellers aged 35-44 were the most likely group to have travelled with a child under 18 years of age. Travel party composition was similar among those who visited Canada, although travel parties containing children and parents are more common.

Booking

Chinese long-haul travellers remain heavily reliant on travel agents/tour operators, with 91% consulting a travel agent/tour operator on their most recent long-haul trip for either planning or booking purposes. Travel agent/tour operator use is even higher among visitors to Canada (96%). An additional question added in 2017 shows that travel agents/tour operators are used most often to research and book flights and accommodations. However, the use of travel agents/tour operators to book accommodations is less common for trips to Canada than in general (29% vs. 40%).

Travel Agent/Tour Operator Usage



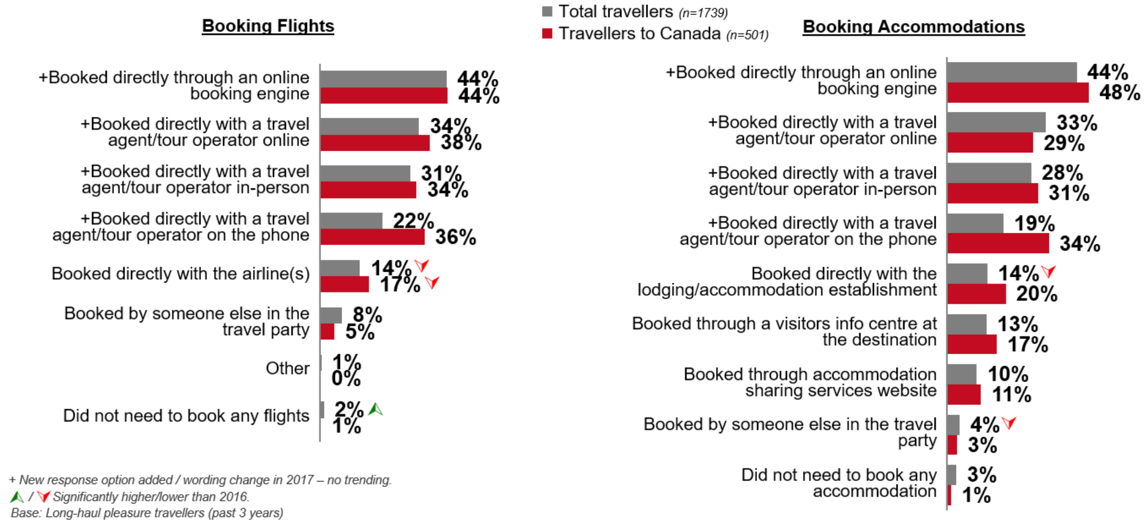
+ New question added in 2017 – no trending.
Base: Long-haul pleasure travellers (past 3 years)
+QRT15. Did you use a travel agent or tour operator to help you with any of the following for this trip?

In terms of flights, the most popular way to book is through an online booking engine (44%), followed by travel agents/tour operators online (34%), and travel agents/tour operators in-person (31%).

For accommodation, online booking engines are also the most popular overall (44%), followed by travel agents/tour operators online (33%) and travel agents/tour operators in-person (28%). For trips to Canada, however, booking accommodations with a travel agent/tour operator over the phone is the 2nd most common way to book (34%), behind online booking engines (48%).

There appears to a movement away from booking directly with airlines, with significant declines for this method of booking flights, both generally and among recent visitors to Canada. This is also the case for booking accommodations directly with the provider, with significant decline for booking directly, regardless of destination.

Booking of Flights and Accommodations



+ New response option added / wording change in 2017 – no trending.
▲ / ▼ Significantly higher/lower than 2016.
Base: Long-haul pleasure travellers (past 3 years)
QRT6. How did you book your flight for this trip?
QRT7. How did you book your accommodation for this trip?

Organized group travel is very common among Chinese travellers, with 85% indicating that at least a portion of their most recent trip was part of an organized group. Booking group travel directly with a travel agency, either in-person or online, and booking through an online booking engine are equally common ways of arranging organized group tours.

Type of Accommodation

Regardless of destination, Chinese travellers show a preference for mid-priced hotels (40%) followed by budget hotels (33%). Budget hotels are even more popular among recent visitors to Canada (35% opted for a budget hotel and 33% for a mid-price hotel). Among visitors to Canada, significantly more are using rented accommodation (20%, up from 12% in 2016) and dorm facilities (18% vs. 11% previously).

Information Sources

HIGHLIGHTS

- ✓ *In-person interactions with friends and family are instrumental in the early stages of the path-to-purchase cycle.*
- ✓ *TV programs, travel guidebooks, and brochures also play an important role for Chinese travellers to Canada.*

Examining information sources by path-to-purchase stages is informative. Personal interactions with friends and family are the most influential source in the dreaming, seriously considering, and making arrangements stages, and are 2nd to travel brochures in the planning stage. This underscores the need to encourage past visitors to Canada to advocate and share their experiences in-person with their personal networks. Guidebooks and brochures are instrumental in the information gathering stage, and also play an important role in the dreaming through travel arrangement stages. TV programs are the 2nd most influential source in the dreaming stage and a top 5 source in the latter stages, underscoring the importance of this medium in awareness building.

Top Information Sources for Canada – by P2P Stage

Information sources that…	**Dreaming** *…inspired you to think about a trip to Canada*	**Seriously Considering** *…encouraged you to seriously consider visiting Canada*	**Started Gathering** *…helped you gather some information for a trip to Canada*	**Planning Itinerary** *…helped you plan your itinerary for a trip to Canada*	**Making Arrangements** *…helped you make transport and / or accom arrangements for a trip to Canada*	**Already Booked** *…helped you book your transportation and / or accom for a trip to Canada*
	(n=440)	(n=619)	(n=432)	(n=275)	(n=66)*	(n=11)***
Top 5 Sources	Friends and family, in person **42%**	Friends and family, in person **35%**	Travel guidebooks **35%**	Brochure from travel agency/tour operator **35%**	Friends and family, in person **40%**	Brochure from travel agency/tour operator **66%**
	TV programs **27%**	Travel booking sites **32%**	Brochure from travel agency/tour operator **33%**	Friends and family, in person **32%**	Travel guide websites **30%**	Consumer tradeshow **45%**
	Travel guidebooks **27%**	Travel review sites **31%**	Travel booking sites **32%**	TV programs **31%**	Brochure from travel agency/tour operator **28%**	Travel booking sites **40%**
	Films featuring the destination **25%**	Brochure from travel agency/tour operator **28%**	Travel review sites **30%**	Films featuring the destination **27%**	TV programs **25%**	TV programs **31%**
	Brochure from travel agency/tour operator **24%**	Travel guidebooks **28%**	Social media sites **30%**	Travel guidebooks **26%**	Travel booking sites **24%**	Friends and family, online **27%**

+ New question added in 2017 – no trending.
** Small base size (<100), interpret with caution.* **** Extremely small base size (<30), directional finding only.*
Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1787)
+QMT3. Earlier you mentioned that you [insert P2P stage for Canada]. Where did you see, read or hear information that [inspired/encouraged/helped in P2P stage for Canada]?