

CONSUMER PROFILE CANADA



SUMMARY

TRAVELLER PROFILE

Motivations for travel

Canadian travellers choose a destination based on friendly citizens, good food and wine, history and heritage and world-class nature.

A destination must also satisfy the rational factors of safety and security and value for money.

Where are they going?

The most visited destination for Canadian travellers is Western Europe, specifically including France, Italy and the UK. Australia is seventeenth on the list in terms of trips taken in 2015, following Spain and Thailand.

Where do they want to go?

The UK, France and Italy are most definitely on their to do list in the next two years. Australia makes it onto the aspiration list for the next four years, at fourth position, but Western European destinations are the priority for Canadian travellers.

Who do they travel with?

Over one-third of Canadian consumers travel as a couple.

Perceptions of Australia

Australia is well-regarded for friendly and hospitable locals, ranking in first position for an importance factor which is highly valued by Canadian travellers. However, food and wine perceptions are poor, with Australia's ranking falling behind that of other competitive long-haul destinations.

TRAVELLER BEHAVIOUR

How do they prefer to travel?

- › Trip length is longer than the average of international travellers, at 14 nights featuring an average of four destinations.
- › Preferred styles of travel include visiting friends and family and resort holidays.
- › Less than one-third of trips are tour groups, with trips primarily involving semi-independent or fully-independent travel.

When do they travel?

January, March and August are the peak travel months for Canadian consumers, with lead times typically falling between three to six months.

For travel to Australia, specifically, November-March is the peak travel period for Canadian travellers.

How do they plan to travel?

For early planning and inspiration, Canadian travellers are using a combination of online and offline sources including talking to family and friends, general internet searching, and reading travel or guide books.

How do they book travel?

When it comes to booking, the majority are doing so via a travel agent (in person or by telephone) or directly via an airline's website.



TripAdvisor Facts

Canada is the eighth largest international market viewing Australia on TripAdvisor, at 3.6% of all sessions. In 2016 this figure grew 18.9% year-on-year. With Canada's position as the eighth largest market viewing Australia, this represents a small percentage of all the other international destinations they are searching.

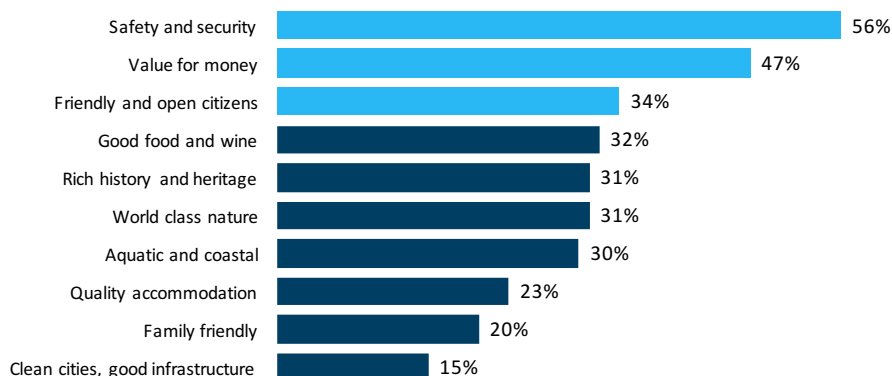
CANADIAN TRAVELLER PROFILE



The information in this fact sheet comes from Tourism Australia's (TA) international consumer research study the 'Consumer Demand Project' (CDP). The CDP was set up in 2012 to look into how global consumers view Australia and what most motivates them to visit.

Insights from the CDP have been used extensively to inform and support development of TA's strategic direction, campaign development as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism. The research is used to help shape the future marketing of Australia and identify opportunities to make the country's tourism offering more attractive to overseas visitors.

Most important factors when selecting a holiday destination



Read as: 56% of respondents rate 'safety and security' among the top five most important factors when choosing a holiday destination.

Notes: *Average nights: the sum of all nights divided by the sum of all visitors. **Median nights: represents the midpoint length of stay for which 50% of visitors stay less and 50% stay longer, removing the impact of very long stay visitors. † Data refers to an average of 2012-2016. ‡ Refers to share of arrivals of respective purpose. # Other includes education, employment and others. Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016.

MARKET OVERVIEW

In 2016, Canada was Australia's 14th largest inbound market for visitor arrivals, 13th largest market for total visitor spend and 15th for visitor nights.



Holiday^{o§}

43%



Visiting friends & relatives^{o§}

33%



Business^{o§}

11%



Other^{o§*}

13%



\$0.8bn

Total spend²
(↓ 5 per cent)



Average nights stayed^{o§}



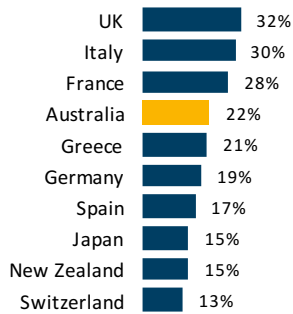
Median nights stayed^{o§}

AUSTRALIA'S POSITION AND OPPORTUNITY

Purchase funnel

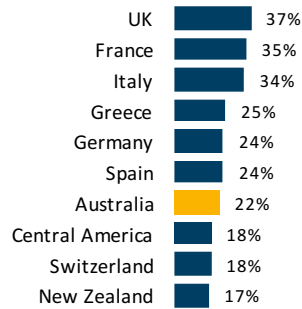
Aspiration

Which of the following destinations are you *considering travelling to* in the next 4 years?



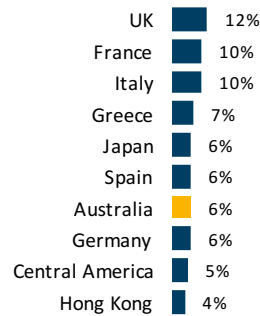
Awareness of holiday experiences

How aware would you say you are of the holiday experiences on offer in the following destinations?



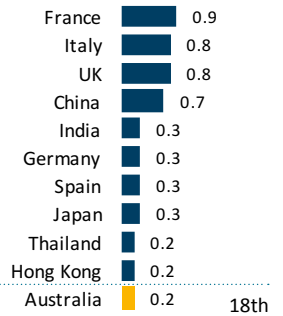
Intention

Which of the following destinations are you *actively planning to visit for* a holiday in the next 2 years?



Visitation

millions of trips in 2016¹



Read as: 22% of Canadian consumers are considering travel to Australia in the next 4 years, while 6% are intending to visit in the next 2 years. Australia is ranked #18 for visitation against other out-of-region (OOR) destinations for Canadian travellers.

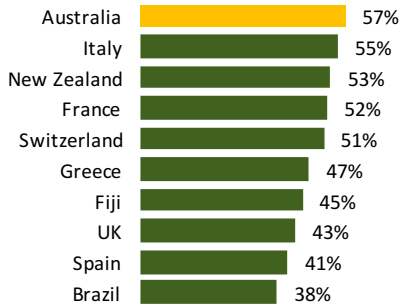
Sources: 1: Tourism Economics, YE 2016

HOW DOES AUSTRALIA RATE?

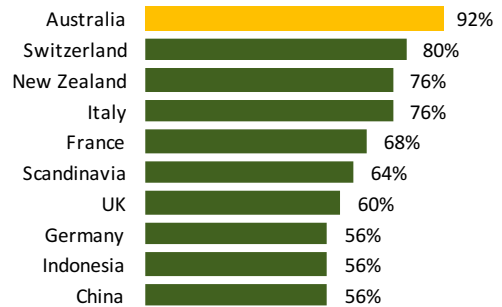
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

World class nature

Respondents who have not visited Australia



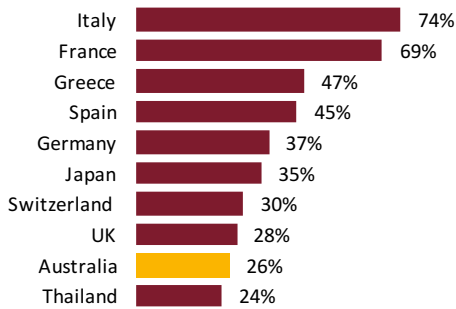
Respondents who have visited Australia



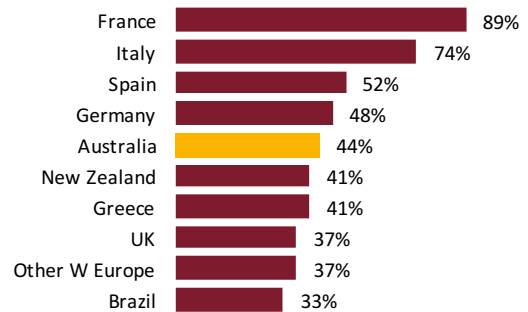
Read as: 57% of respondents who have not visited Australia associate Australia with 'world class nature.' This figure rises to 92% among those who have visited.

Good food and wine

Respondents who have not visited Australia



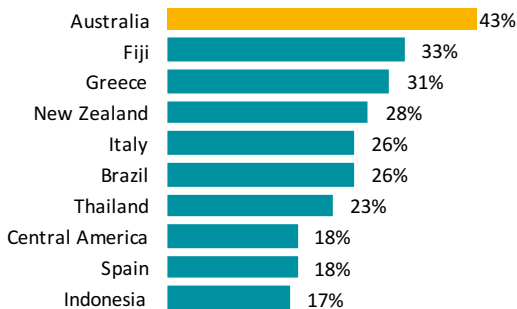
Respondents who have visited Australia



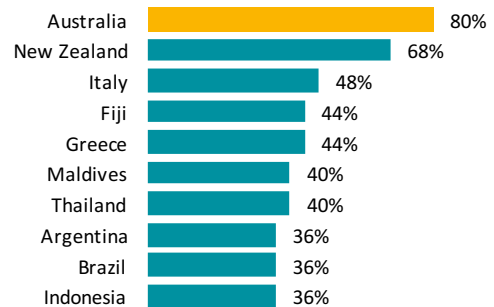
Read as: 26% of respondents who have not visited Australia associate Australia with 'good food and wine.' This figure rises to 44% among those who have visited.

Aquatic and coastal

Respondents who have not visited Australia



Respondents who have visited Australia

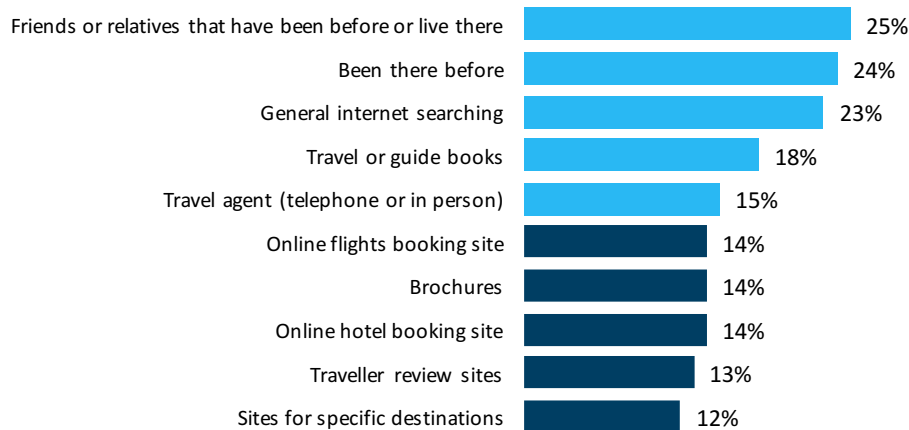


Read as: 43% of respondents who have not visited Australia associate Australia with 'aquatic and coastal' experiences. This figure rises to 80% among those who have visited.

PLANNING AND BOOKING INFORMATION SOURCES

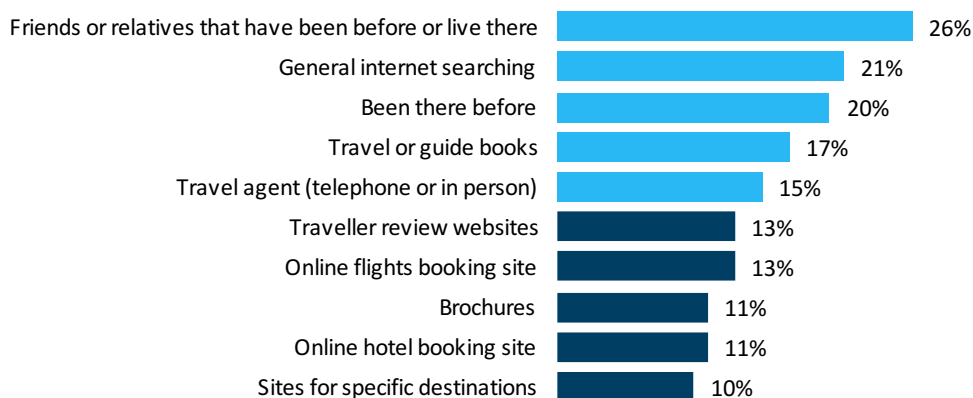
The following charts highlight the information sources that Canadian consumers use to plan and book their holidays.

Preferred sources for *early planning and holiday inspiration*



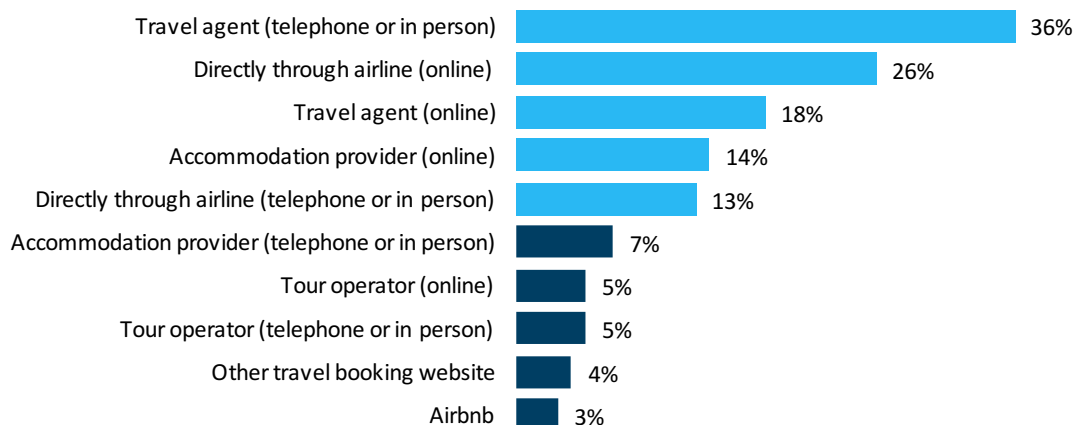
Read as: 25% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source during the early stages of planning a holiday.

Preferred sources for *seeking information a holiday destination*



Read as: 26% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source for seeking information about a holiday destination.

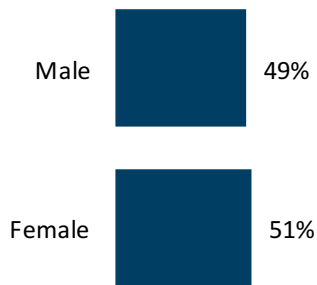
Preferred sources used to *book a holiday*



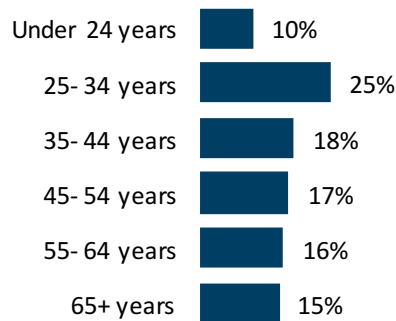
Read as: 36% of respondents indicate booking via a 'travel agent (telephone or in person)' as a preferred source when booking a holiday.

RESPONDENT PROFILE

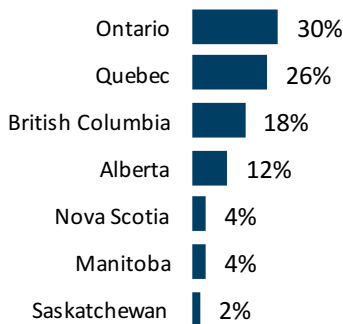
Gender



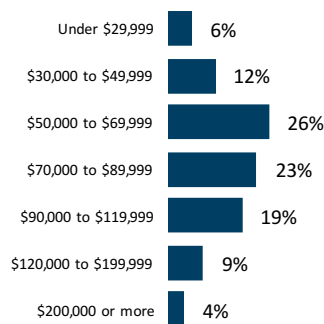
Age



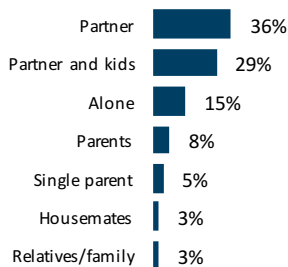
Place of residence



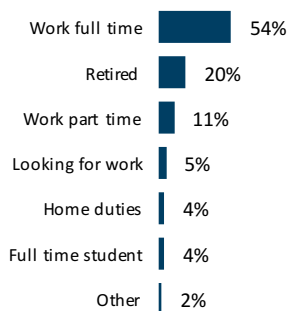
Income



Living situation



Employment status



Occupations



ABOUT THE RESEARCH

The Consumer Demand Project (CDP) research is carried out by BDA Marketing Planning, a consultancy who specialise in international demand side strategy development and consumer research. It helps determine the strategic priorities to achieve the Tourism 2020 goal, by providing a comprehensive assessment of Australia's current destination appeal and the latent demand potential. The research is conducted annually across eleven of Australia's key tourism markets: China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA. In 2016, the following markets were integrated into the program: Hong Kong, Taiwan, Canada, Brazil, France and Italy. Over the last five years, Tourism Australia have spoken to over 90,000 international long-haul travellers via online research panels.

WANT TO KNOW MORE?

Fact sheets for seventeen of Australia's key tourism markets can be accessed at: <http://www.tourism.australia.com/statistics/consumer-demand-research.aspx>

For more information, please contact:

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