

Tourism HR Canada: A Global Survey on Perspectives of Service Delivery and Traveller Priorities

Final Report

February 2022



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The information and data found in this document are current as of the date of submission to Tourism HR Canada and subject to change given market forces and external variables.

February 2022

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AS THE TRAVEL AND TOURISM INDUSTRY GRADUALLY RECOVERS FROM THE COVID CRISIS, ADDRESSING SERVICE DISRUPTIONS WILL NEED TO BE BALANCED AGAINST SAFETY AND PRICE SENSITIVITY.

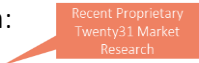
EXECUTIVE SUMMARY

- While many developed destinations consider themselves to be at the tail-end of the COVID-19 pandemic, with vaccine rollouts now well underway, the disruption to the value chain as a whole is far from over.
- According to current projections, the tourism industry in Canada is not expected to recover to 2019 levels until 2025.
- With this challenge in mind, tourism businesses will need to prioritize and allocate their resources effectively to ensure they are able to develop their products and services to adapt to the new normal while still delivering quality in line with what travellers value.
- Broadly speaking, the overall visitor experience remains the most important concern for international travellers in selecting a destination to travel to (unsurprisingly as this encompasses a range of factors).
- Quality service is second only to the overall visitor experience in this regard and thus will be of paramount importance in destination recovery efforts.
- Quality of service is particularly valuable to the lucrative Chinese market to which international destinations will have to appeal to thrive in the new global travel market in the years to come.
- However, health and safety concerns (particularly in Britain and Australia) and price and affordability are also major concerns. Price and affordability is somewhat prioritized across destinations and this is likely driven by post-COVID price sensitivity among travellers.
- In terms of the impact of service disruption on destination selection, Canada performs well relative to other destinations, with travellers reporting relatively low impact – particularly in the USA, South Korea, France, and Germany.
- China, however, is an exception to this, placing Canada as being most impacted by potential service disruption in terms of destination selection.
- China is also one of the few countries to consider service disruption in Canada more serious than at home.

THIS RESEARCH IS BASED ON SURVEYS WITH REPRESENTATIVE SAMPLES OF 800 TRAVEL CONSUMERS IN EACH OF 9 MAJOR OUTBOUND SOURCE MARKETS.

METHODOLOGY

- The findings detailed in this report are based on an opinion survey of a representative sample of n=800 identified travel consumers in each of 9 outbound travel markets.
- Fieldwork was carried out online in November/December 2021. A representative sample of the online population in each market was drawn, stratified by age, gender and region.
- These were defined as those who either: 1. Had taken an international overnight holiday/vacation trip in the past three years (i.e., since April 2018); and/or 2. Are likely to take an international overnight holiday/vacation trip in the next three years (i.e., by April 2024).
- Results are representative of the online adult traveller population in each market and are considered accurate within +/- 2 to 3 percentage points, 19 times out of 20.
- The survey uses a questionnaire developed by Twenty31 Consulting. It was fielded in English and official languages in each country.
- All figures in the charts and tables in this report are expressed in percentages (%), unless otherwise indicated. Total percentages may not add to 100 because of rounding. Question wording and the base sample size is provided in the bottom of select pages.
- Note – to provide context with the global results, select data points from Twenty31’s latest perception tracking research of Canadian travel consumers (August 2021) are included. These pages are donated with the following icon:



SURVEY MARKETS



China



France



Germany



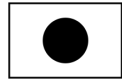
India



Australia



South Korea



Japan



UK



US

Section 1: Global Trends and Impact of COVID-19

- Trends affecting tourism at the global and national level
- An overview of the global impact of COVID-19 on tourism to date
- Overview of impact on tourism in Canada to date



THE WORLD IS AT A CROSSROADS GEOPOLITICALLY AND TECHNOLOGICALLY, RENDERING 2022 A YEAR FULL OF BOTH POTENTIAL RISK AND OPPORTUNITY.

GLOBAL TRENDS ASSESSMENT

| POLITICAL | ECONOMIC | SOCIAL | TECHNOLOGICAL | ENVIRONMENTAL | REGULATORY |
|--|--|---|---|--|---|
| <ul style="list-style-type: none"> • Divisions over lockdown measures as well as the US election have led to an unusually high level of political polarization in the West. • China came under increasing scrutiny over the COVID-19 pandemic as well as human rights abuses, though continues to be highly influential globally. • Tensions also grew between East and West, encompassing US relations with both China and Russia. • The EU is looking to reassert its role both politically and economically with plans for a ‘Green COVID-19 recovery’. | <ul style="list-style-type: none"> • There has been an inevitable economic downturn as a result of COVID-19, with an unequal recovery predicted. • There were steep declines in global trade and financial flows to developing countries. • The global tourism industry has undergone an almost complete halt, with tentative recovery initiating now but a long road ahead to return to 2019 levels of economic health. • While China is forecasted to continue its rapid growth in 2021, Latin America and the Eurozone look set to lag. | <ul style="list-style-type: none"> • COVID-19 has precipitated worldwide social isolation, with increasing rates of mental health issues affecting particularly young people. • Following incidents of racial violence in the USA, there has been a widespread increase in racial tensions and rise of racial justice movements. • Amplified inequalities, including in gender and digital accessibility, also came to the fore during the COVID-19 crisis. • Migrations out of major cities has taken place, particularly in developed countries like the USA. | <ul style="list-style-type: none"> • Blockchain and cryptocurrency seems to be intermittently resurgent, with the world looking for new ways to bank and secure incomes. • Artificial Intelligence, 5G wireless networks, and other digital technologies will form the backbone of the digital economy but also increase geopolitical competition. • The main political blocks, the US, EU and China are expected to compete for greater self-reliance, particularly in digital technologies. • Corporates and office-based companies have increasingly moved to remote-working . | <ul style="list-style-type: none"> • Climate change continued to disrupt ecosystems, with the early part of 2020 defined by wildfires in Australia, with ongoing wildfires and water shortages in major hubs such as California. • Environmental, Social, and Governance (ESG) fund flows defied pandemic panic in 2020. • Environmental factors came to the fore, as the European Union began to finance part of its relief package through green bonds. • Ambitious climate policy agendas are likely (often as part of COVID-19 stimulus plans) as more countries announce carbon neutrality targets. | <ul style="list-style-type: none"> • Non-governmental forces largely failed to take a lead in the fight against the pandemic, leading some to suggest a greater role for the state in the post-pandemic world. • It is predicted that “vaccine nationalism”, export controls, restrictions on cross-border people movement will create additional risks in markets around the world. • While travel restrictions globally are easing, the post-pandemic recovery and vaccine rollout are unpredictable and unequal which could result in further restrictions. |

CANADA HAS HAD TO WEATHER SEISMIC CHANGES IN THE PAST TWO YEARS BUT HAS MAINTAINED A RELATIVELY STABLE POSITION.

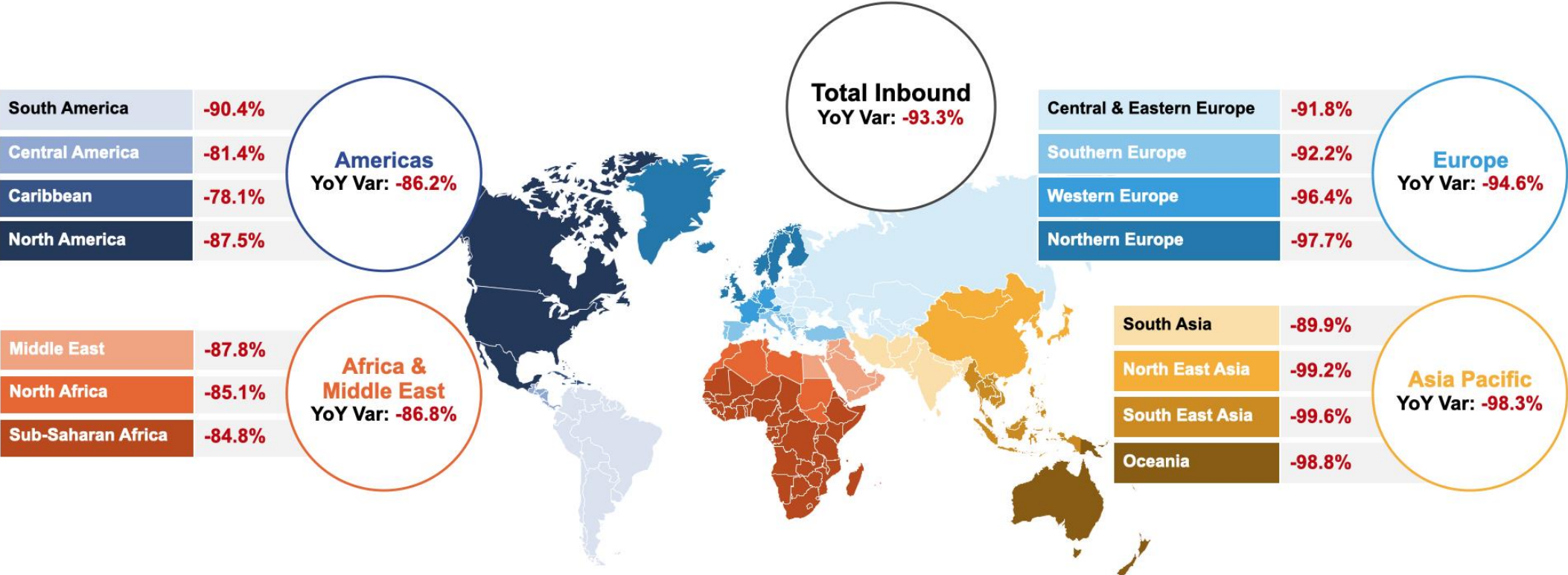
DOMESTIC TRENDS ASSESSMENT

| POLITICAL | ECONOMIC | SOCIAL | TECHNOLOGICAL | ENVIRONMENTAL | REGULATORY |
|---|--|---|---|--|--|
| <ul style="list-style-type: none"> On the geopolitical stage, Canadians view the world as less friendly than they did previously - Compared with 2013, only half as many Canadians in 2020 saw China as a friend; almost five times as many see that country as an enemy. Only three-in-five Canadians thought of the United States as a friend. Following the recent election, Justin Trudeau remains the Prime Minister of Canada, with the center-left maintaining their leadership position in the country. | <ul style="list-style-type: none"> According to projections by Deloitte, The Canadian economy will rebound strongly and grow by 3.8% in 2022, thanks to reduced COVID-19 restrictions in the second half of this year and buoyant external demand. These developments will be echoed in a recovery in the labour market. The nation’s economic recovery is undoubtedly on a slower path than expected earlier in the year. However, Canada’s near-term economic growth trajectory remains solid. | <ul style="list-style-type: none"> At the end of 2019, the environment had overtaken the economy as the public’s top preoccupation and this remains despite the disruption of the pandemic. The anti-racism protests that erupted worldwide in the spring of 2020 sparked a significant re-think of the issue among Canadians. Before the pandemic, news in Canada was dominated by the issue of Indigenous rights and the issue is reemerging with frustration at the seemingly slow pace – indigenous issues also have considerable implications for the tourism sector. | <ul style="list-style-type: none"> In the wake of en-masse remote working as a result of the pandemic, online content and service delivery models will continue to proliferate, workplaces will stay remote ushering in the 5G era of mobile wireless communications. With the COP21 and more resources freeing up as the pandemic begins to abate, a refocus on green tech is to be expected in which Canada is generally considered a leader. Health and hygiene innovation will also be both required and encouraged, particularly within the tourism industry as travel resumes. | <ul style="list-style-type: none"> As part of its Paris Agreement commitments, Canada has pledged to achieve greenhouse gas (GHG) emission levels 30 percent below 2005 levels by 2030, and has set a goal of net-zero GHG emissions by 2050. As the country emerges from the pandemic, Canadians can expect to see an increasing focus on achieving these goals. Most Canadians favour action to address climate change, but there is less agreement on what action to take. Surveys show there are a significant number of Canadians concerned actions are moving either too slowly or too quickly. | <ul style="list-style-type: none"> 2020 saw the federal government unveil draft regulations and associated analyses of the Clean Fuel Regulations (CFR) – requiring that all “primary suppliers” (producers and importers) of liquid fossil fuels achieve reductions in the lifecycle carbon intensity (CI) of their products. Canada is seeing its most significant overhaul to its privacy laws in over 20 years which will create numerous obligations for Canadian and foreign businesses. |

INTERNATIONAL ARRIVALS EXPERIENCED A VERY SLOW START TO 2021.

GLOBAL IMPACT OF COVID-19

INTERNATIONAL ARRIVALS TO WORLD REGIONS,
1-31ST JANUARY, 2021; YEAR-ON-YEAR VARIATIONS



* excluding domestic

COVID-19 IS PROVING TO BE THE MOST SIGNIFICANT THREAT TO THE VIABILITY OF TOURISM ACROSS THE WORLD.

GLOBAL IMPACT OF COVID-19

- COVID-19 is likely to be deemed the most abrupt shock to the global economy and society in modern history.
- The global travel and tourism industry is profoundly impacted and will face a real risk to near-term survival of many tourism operators and a significant disruption to communities, SMEs, trade channels and destinations.
- While continued action and vigilance will be required to control further spread of the virus, urgent action is also required to protect the livelihoods of the millions of individuals and businesses impacted.
- While most developed countries are on the tail-end of the pandemic and vaccine rollouts are proceeding rapidly, the crisis is far from over and, even once the threat of the virus itself has been significantly diminished, the road to recovery for many sectors, especially tourism, will be a long one.
- Global tourism may not return to 2019 levels quickly (e.g., Tourism Economics, a division of Oxford Economics suggests a return to 2019 tourism levels by 2023, under certain conditions), and while tourism may recover, albeit in an altered form, destinations need to develop strategies and action plans with a focus on resilience as a competitive advantage and as much downside management of risk as a first priority in order to hit the ground running once the pre-conditions for resumption of tourism, as societal and travel restrictions are gradually lifted, are met.
- Whatever the specifics of the new normal, the tourism sector will be very different in 2022 from what it was in 2019. This brings challenges for the sector, but also opportunities to encourage innovation, drive new business models, explore new niches and markets, open up new destinations, and move to more sustainable and resilient tourism development models.

WHILE THE DISRUPTION AND HARM TO THE GLOBAL TOURISM ECONOMY HAS BEEN CATASTROPHIC, THE CRISIS ALSO PRESENTS A NUMBER OF POTENTIAL OPPORTUNITIES.

GLOBAL IMPACT OF COVID-19

- An across-the-board deterioration of tourism is not the full story and a more granular analysis predicts growth in certain specific subsectors and clusters that are able to accommodate the demands of a pandemic environment.
- While in the short-term the primary imperative for most sectors is to find the best and most flexible policy solutions to survive the pandemic intact, looking ahead, the post-COVID world presents opportunities to learn from the crisis as well as play an active role in defining the new business landscape.
- For example, experts foresee growing demand for open-air and nature-based tourism activities, with domestic tourism and ‘slow travel’ experiences (an approach to travel that emphasizes connection: to local people, cultures, food and music).
- Destinations seeking to differentiate in the “new normal” will need to consider the longer-term picture, while pursuing opportunities around digitalisation, supporting a transition away from carbon-intensive practices, and promoting interventions to build a more sustainable and resilient global tourism industry.
- Safety and hygiene have become key selection criteria for travellers when planning a vacation. People are likely to prefer ‘private solutions’, avoiding big gatherings or mass accommodation, and prioritizing private means of transport.
- Digitalisation of tourism services is also expected to continue to accelerate, with higher use of automation, contactless payments and services, virtual experiences, and real-time information provision across the value chain.

WHILE THE FUTURE LOOKS MORE OPTIMISTIC FOR TOURISM IN CANADA, IT WILL TAKE TIME TO RECOVER FROM THE DEVASTATION OF THE PANDEMIC.

DOMESTIC IMPACT OF COVID-19

- March 2020, the number of international arrivals to Canada from other countries fell by 54.2% from February 2020, the largest single monthly drop since 1972. By the first week of April 2020, the hotel occupancy rate was below 20% across Canada.
- To reduce the spread of COVID-19, the Canadian government closed its international border to non-Canadian citizens and permanent residents, with the exception of US citizens.
- Shortly following this, the Canada–US border was closed to non-essential travel, and various restrictions on non-essential travel to and from Canada were in place for the remainder of 2020 and continued into 2021.
- Some restrictions affected domestic travel of Canadians as well, such as the closure of various provincial and territorial borders, restrictions placed on travel between regions of a province or territory, and limitations of non-essential travel.

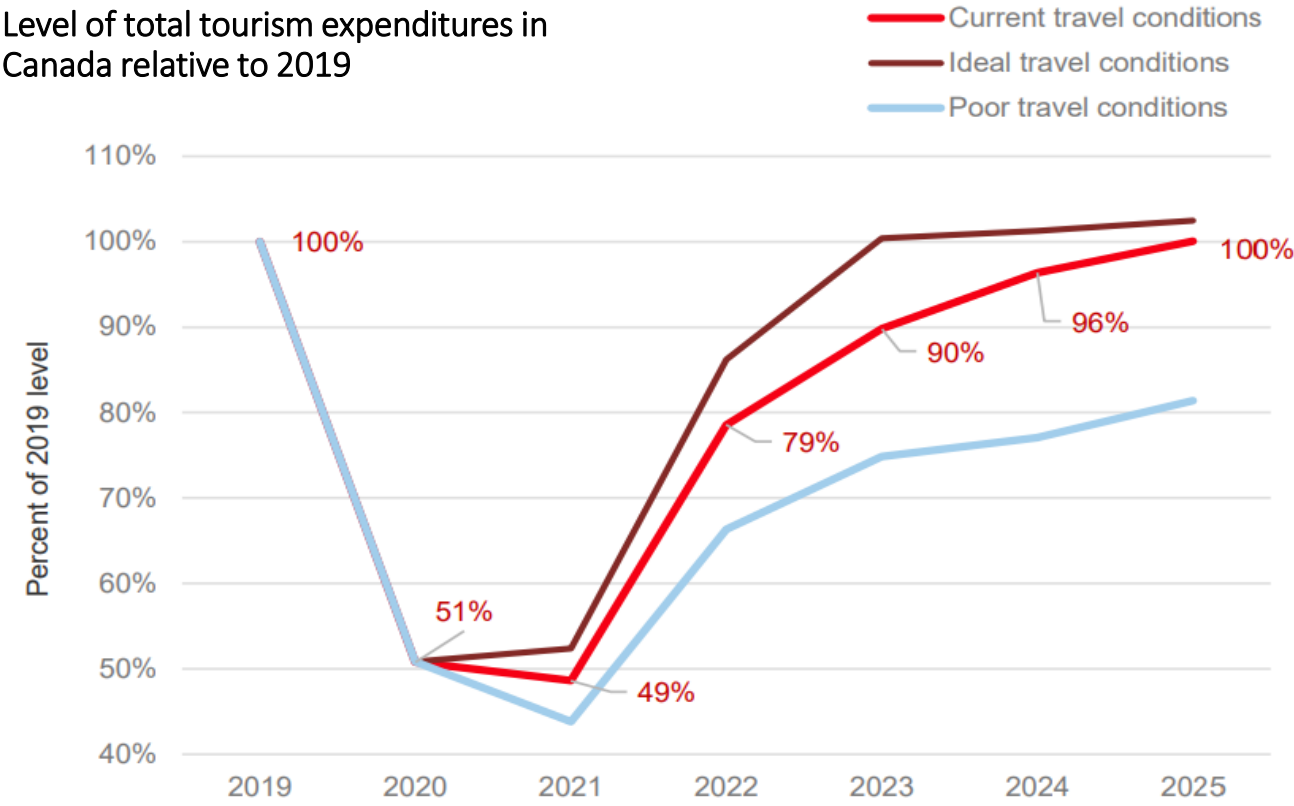
- Under these circumstances, many businesses in the tourism industry have had to reduce their hours, or close temporarily or permanently, which led to laying off employees. In 2020, tourism activities generated about 530,000 jobs.
- The tourism sector employed 464,000 fewer people in 2020 than in 2019, an employment decrease of 22.2%.
- Although travel has edged up each month since the record low in March 2020, travel has still remained far below 2019 levels.
- Despite the challenges businesses in the tourism sector are currently facing, in the long term, the majority of these businesses were either somewhat (50.3%) or very optimistic (15.4%) about the future outlook of their business over the next 12 months according to Statistics Canada.

Source: Statistics Canada

ACCORDING TO CURRENT PROJECTIONS, TOURISM IN CANADA IS NOT EXPECTED TO RECOVER TO 2019 LEVELS UNTIL 2025.

RECOVERY PROJECTIONS FOR TOURISM IN CANADA

Level of total tourism expenditures in Canada relative to 2019



KEY IMPLICATIONS

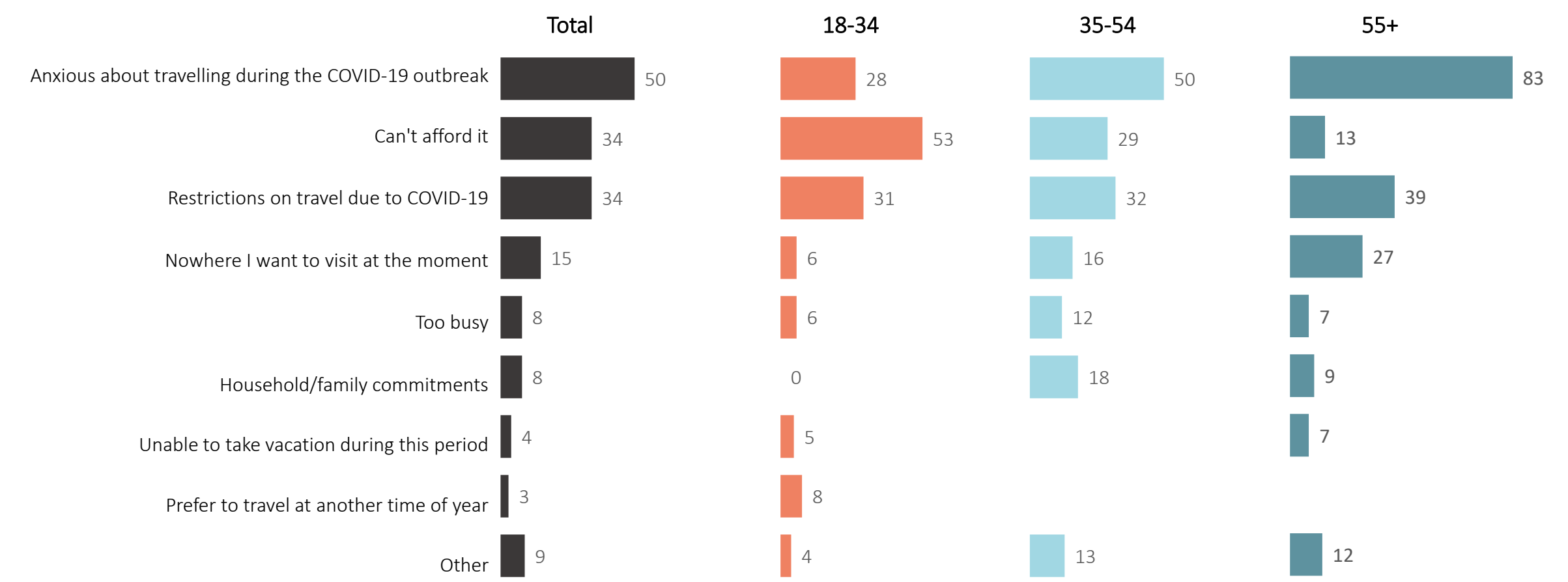
- This figure shows Destination Canada’s recent tourism recovery timeline for tourism expenditures in Canada.
- Based on current travel conditions, full recovery to 2019 levels is not expected until 2025 in Canada.
- Faster recovery could occur if:
 - global vaccination efforts are successful and;
 - Canadians shift more of their international travel spend towards domestic travel, as domestic travel spending expected to recover faster.
- All told, even the more optimistic projections indicate a long recovery for Canada, though it is in a relatively stable position to pursue recovery compared to more impoverished countries or those harder hit by the most intense waves of the pandemic.

Source: Destination Canada

ANXIETY RELATED TO THE COVID-19 PANDEMIC IS THE MAIN BARRIER TO TRAVEL AMONG CANADIANS, PARTICULARLY AMONG OLDER TRAVELLERS.

Recent Proprietary
Twenty31 Market
Research

DOMESTIC IMPACT OF COVID-19, CANADIAN TRAVEL CONSUMERS, AUGUST, 2021



Source: Twenty31 – Quantitative survey of Canadian travel consumers, August, 2021

Base: n=1,000
Q7. Why do you say you are unlikely to take an overnight holiday/vacation trip staying in paid accommodation during the next 12 months?


A hand holding a smartphone, displaying a landscape photo of a field and hills. The phone's camera interface is visible, showing various settings and a large shutter button. The background is a blurred view of a field and hills under a clear sky.

Section 2: Traveller Influences

- Traveller information sources
- Influential factors in destination selection
- Influence and planning channels among Canadians

OVERALL TRAVEL AGENTS AND OPERATORS ARE PRIMARY INFORMATION SOURCES THOUGH WORD OF MOUTH, BOTH ON AND OFFLINE ARE ALSO HIGHLY IMPACTFUL.

INFORMATION SOURCES ABOUT TRAVEL DESTINATIONS

| <div>INFORMATION SOURCES</div> | % selected | SOURCE MARKETS | | | | | | | | |
|--|------------|----------------|-------|--------|---------|-------|-------|-------------|----|-----|
| | Total | Australia | China | France | Germany | India | Japan | South Korea | UK | USA |
| Travel agents or tour operators | 42 | 46 | 38 | 46 | 47 | 34 | 48 | 45 | 44 | 35 |
| People I know offline | 34 | 32 | 41 | 45 | 38 | 23 | 24 | 32 | 32 | 34 |
| Friends on social media | 26 | 27 | 42 | 17 | 23 | 33 | 11 | 24 | 21 | 27 |
| Digital / online advertising | 24 | 27 | 17 | 22 | 24 | 29 | 27 | 29 | 21 | 23 |
| Social media advertising | 24 | 22 | 33 | 18 | 17 | 35 | 22 | 22 | 18 | 28 |
| TV advertising | 21 | 24 | 18 | 14 | 22 | 23 | 21 | 21 | 28 | 18 |
| YouTube channels produced by influencers \ "Online channels produced by influencers" | 19 | 16 | 13 | 12 | 10 | 39 | 15 | 38 | 11 | 20 |
| Print advertising | 16 | 21 | 8 | 17 | 18 | 14 | 23 | 10 | 18 | 19 |
| Websites produced by influencers | 14 | 13 | 11 | 13 | | 22 | 12 | 20 | 12 | 17 |
| Radio advertising | 4 | 3 | 6 | 3 | 4 | 7 | 3 | 1 | 4 | 4 |

ACCOMMODATION, RESTAURANTS, AND CULTURAL FACTORS ARE MOST INFLUENTIAL OVERALL FOR INTERNATIONAL TRAVELLERS WHEN SELECTING A CITY TO TRAVEL TO.

INFLUENTIAL FACTORS IN CHOOSING TRAVEL DESTINATIONS



Extremely important (9+10) and Very important (7+8)

SOURCE MARKETS

| | Total | Australia | China | France | Germany | India | Japan | South Korea | UK | USA |
|-----------------------------|-------|-----------|-------|--------|---------|-------|-------|-------------|-------|-------|
| Hotels / Accommodation | 44 39 | 36 45 | 38 49 | 35 44 | 47 34 | 67 25 | 37 43 | 41 39 | 46 38 | 51 34 |
| Restaurants & Food | 41 39 | 31 44 | 39 48 | 31 42 | 32 40 | 65 26 | 35 42 | 44 41 | 40 40 | 49 33 |
| Culture, Arts & Heritage | 37 38 | 27 43 | 40 47 | 33 38 | 30 34 | 58 29 | 32 40 | 30 41 | 28 37 | 46 32 |
| Beach & Marine | 33 35 | 21 37 | 36 47 | 28 35 | 42 33 | 57 31 | 17 34 | 28 36 | 29 36 | 38 26 |
| Family Entertainment | 30 31 | 17 28 | 31 52 | 23 34 | 20 22 | 64 26 | 20 33 | 38 36 | 18 26 | 35 22 |
| General Entertainment | 29 40 | 23 44 | 31 51 | 28 43 | 22 40 | 58 31 | 20 42 | 15 42 | 23 37 | 38 35 |
| Infrastructure | 29 42 | 18 43 | 37 50 | 23 44 | 27 42 | 55 33 | 23 46 | 29 43 | 18 42 | 29 38 |
| Shopping & Retail | 25 34 | 18 32 | 35 50 | 16 29 | 21 31 | 55 31 | 22 42 | 17 35 | 13 30 | 28 29 |
| Outdoor, Adventure & Sports | 24 33 | 15 34 | 32 52 | 20 38 | 21 28 | 55 31 | 13 32 | 15 28 | 15 26 | 30 29 |

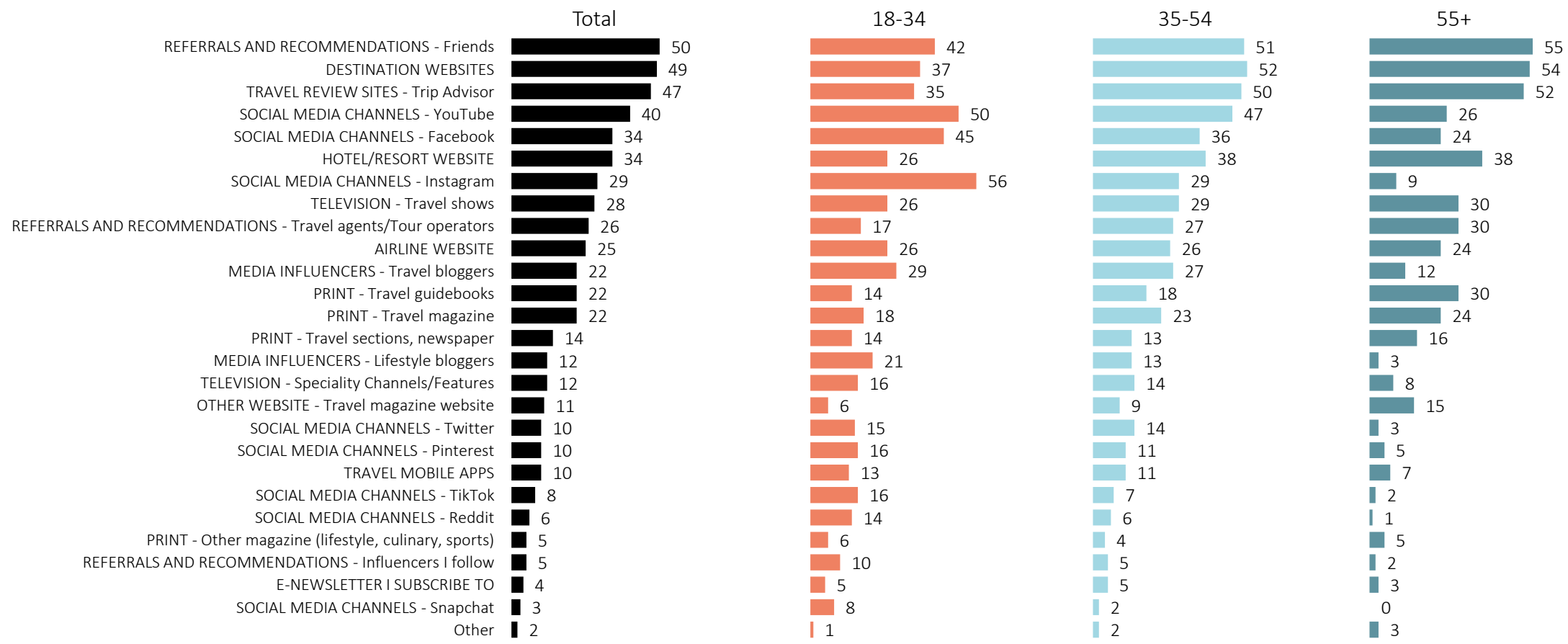
Extremely important (9+10)

Very important (7+8)

AMONG CANADIANS, WORD OF MOUTH IS PRIMARY IN TERMS OF INSPIRING DESTINATION DECISIONS FOLLOWED BY WEB-BASED SOURCES AND SOCIAL MEDIA.

Recent Proprietary
Twenty31 Market
Research

TRAVELLER INSPIRATION SOURCES, CANADA



Source: Twenty31 – Quantitative survey of Canadian travel consumers, August, 2021

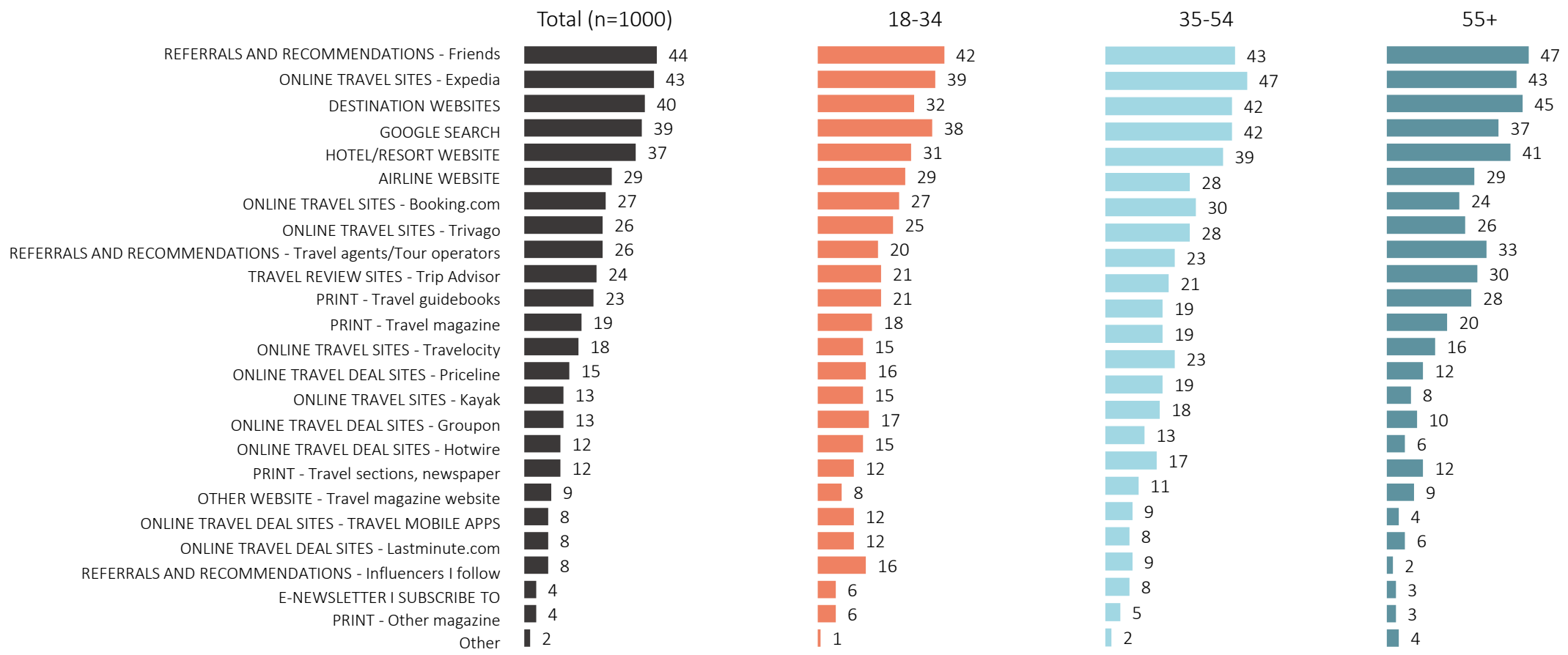
Base: n=1,000
Q25. When you choose a destination in Canada for a holiday/vacation trip, which of the following sources are usually most important in inspiring you? Please select all that apply.



WHEN IT COMES TO PLANNING, CANADIANS ALSO RELY HEAVILY ON PERSONAL NETWORKS BUT ALSO, ONLINE TRAVEL SITES, DESTINATION WEBSITES, AND SEARCH ENGINES.

Recent Proprietary
Twenty31 Market
Research

TRAVELLER PLANNING CHANNELS, CANADA



Source: Twenty31 – Quantitative survey of Canadian travel consumers, August, 2021



Base: n=1,000
Q26. And for planning your detailed itinerary for a holiday/vacation trip within Canada, which of the following would you tend to use? Please select all that apply.

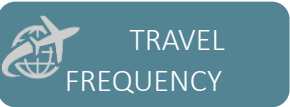
A woman wearing a brown hijab and a black long-sleeved shirt is seated in an airplane cabin. She is looking down at a smartphone in her hands. The airplane seat is blue with orange and grey accents. The background shows the interior of the plane with other seats and windows.

Section 3: Recent Travel Behaviour

- Number of recent overnight trips
- Recent destinations visited

MOST TRAVELLERS HAVE BEEN TO 2 OR FEWER DESTINATIONS IN THE PAST 3 YEARS, WHILE INDIA, THE USA, AND CHINA SHOW THE HIGHEST INSTANCES OF 5 OR MORE DESTINATIONS VISITED.

NUMBER OF DESTINATIONS VISITED IN THE LAST 3 YEARS



| % selected | | SOURCE MARKETS | | | | | | | | |
|------------|-------|----------------|-------|--------|---------|-------|-------|-------------|----|-----|
| | Total | Australia | China | France | Germany | India | Japan | South Korea | UK | USA |
| 5+ | 17 | 10 | 22 | 13 | 15 | 29 | 15 | 13 | 15 | 22 |
| 4 | 8 | 5 | 7 | 5 | 10 | 10 | 6 | 7 | 10 | 8 |
| 3 | 15 | 13 | 14 | 17 | 17 | 15 | 14 | 17 | 14 | 15 |
| 2 | 27 | 29 | 30 | 29 | 28 | 24 | 26 | 28 | 27 | 25 |
| 1 | 32 | 43 | 27 | 36 | 29 | 21 | 39 | 34 | 34 | 30 |

THE USA WAS THE MOST FREQUENTLY VISITED DESTINATION IN THE PAST 3 YEARS OVERALL WITH CANADA NOT FEATURING AMONG THE TOP 10 MOST VISITED DESTINATIONS.

DESTINATIONS VISITED IN THE LAST 3 YEARS



| % selected | SOURCE MARKETS | | | | | | | | |
|------------|----------------|-------|--------|---------|-------|-------|-------------|----|-----|
| Total | Australia | China | France | Germany | India | Japan | South Korea | UK | USA |
| 10 | 12 | 14 | 4 | 6 | 18 | 22 | 13 | 10 | |
| 8 | 2 | 1 | 20 | 18 | 1 | 1 | 2 | 23 | 3 |
| 6 | 7 | 16 | 2 | 1 | 1 | | 25 | 1 | 4 |
| 5 | 3 | 1 | 12 | 7 | 1 | 5 | 1 | 5 | 10 |
| 5 | 2 | 10 | | 4 | 2 | 6 | 1 | 6 | 10 |
| 4 | 5 | 8 | | | 10 | 7 | 3 | 1 | 1 |
| 4 | 8 | 6 | | 4 | 3 | 4 | | | 7 |
| 4 | 5 | 9 | 2 | 3 | 3 | | 7 | 2 | 1 |
| 4 | 1 | 2 | 3 | 4 | 17 | 1 | | 2 | 2 |
| 3 | | 5 | 1 | 1 | 10 | 7 | 3 | 2 | 3 |

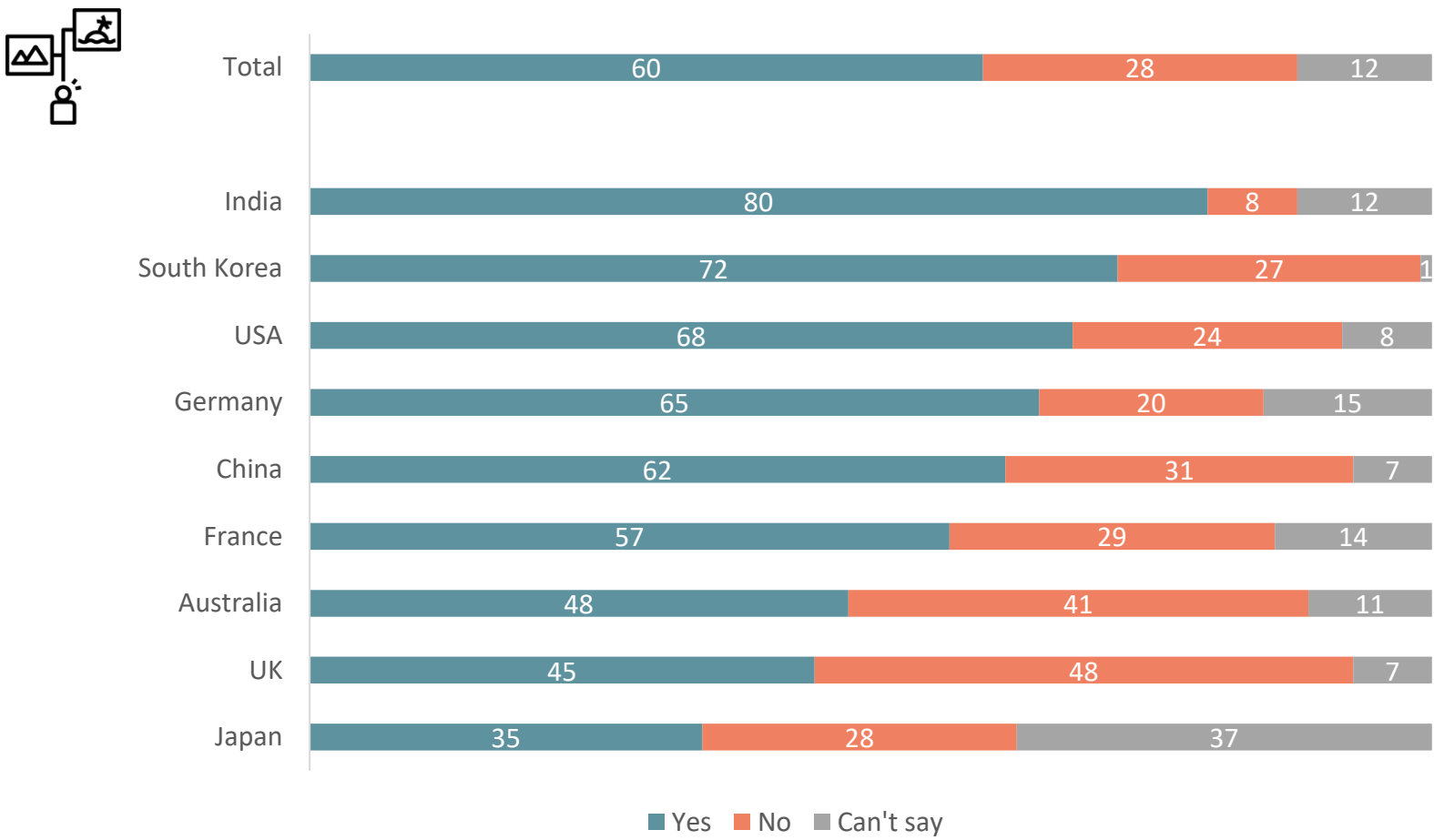
A close-up photograph of a person's hand pointing at a map of Canada spread out on a white table. The map is a standard road map with blue lines for roads and green areas for parks or forests. To the left of the map, a portion of a laptop keyboard is visible. Below the map, a dark blue passport with the word 'PASSPORT' in gold letters is partially visible. To the right of the map, there is a white document with blue text and graphics, possibly a travel itinerary or a brochure. The person's hand is fair-skinned and is wearing a white long-sleeved shirt with a blue cuff. The background is slightly blurred, showing more of the table and the person's arm.

Section 2: Travel Ambitions

- Intentions to travel in the near future
- Destinations of interest for travel in the near future
- Understanding the traveller Path to Purchase
- Travel ambitions among Canadians

INDIANS AND SOUTH KOREANS SHOW THE HIGHEST PROPORTIONS WITH OVERNIGHT TRAVEL PLANS IN THE NEXT SIX MONTHS WITH JAPAN AND THE UK AMONG THE LOWEST.

TRAVEL AMBITIONS IN THE NEXT 6 MONTHS

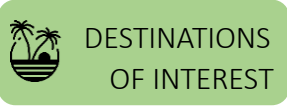


KEY IMPLICATIONS

- 60% of the sample globally have overnight trips planned in the next 6 months, with just under one-third having no plans.
- Indians show the largest proportions with overnight travel plans, followed by South Koreans.
- The UK and Australia are the most travel-hesitant, with 48% and 41% respectively reporting no travel plans which is consistent with current domestic travel restrictions and attitudes towards the COVID-19 pandemic.
- Japanese respondents show the highest proportions who can't say whether they have travel plans in the next 6 months.

THE USA AND SPAIN SHOW THE HIGHEST LEVEL OF INTEREST AMONG INTERNATIONAL TRAVELLERS IN THE NEXT 6 MONTHS WITH THE USA PARTICULARLY APPEALING TO ASIAN MARKETS.

DESTINATIONS OF INTEREST TO VISIT IN NEXT 6 MONTHS



| | % selected | SOURCE MARKETS | | | | | | | | |
|-------------|------------|----------------|-------|--------|---------|-------|-------|-------------|----|-----|
| | Total | Australia | China | France | Germany | India | Japan | South Korea | UK | USA |
| USA | 8 | 7 | 9 | 3 | 5 | 12 | 26 | 13 | 8 | 0 |
| Spain | 8 | 0 | 1 | 19 | 17 | 2 | 3 | 2 | 23 | 6 |
| Japan | 6 | 5 | 14 | 2 | 1 | 4 | 0 | 24 | 1 | 2 |
| Italy | 6 | 5 | 1 | 13 | 10 | 1 | 5 | 2 | 7 | 6 |
| France | 5 | 1 | 8 | 0 | 6 | 2 | 4 | 4 | 9 | 7 |
| Singapore | 4 | 8 | 5 | 0 | 0 | 10 | 3 | 5 | 1 | 1 |
| Dubai | 4 | 0 | 2 | 1 | 3 | 15 | 0 | 0 | 3 | 2 |
| New Zealand | 4 | 23 | 2 | 0 | 1 | 2 | 2 | 1 | 0 | 3 |
| UK | 4 | 8 | 8 | 0 | 0 | 4 | 2 | 0 | 0 | 7 |
| Thailand | 3 | 5 | 7 | 2 | 3 | 3 | 1 | 7 | 1 | 1 |

IN TERMS OF LONGER-TERM AMBITIONS, THE USA SHOWS THE HIGHEST INTEREST, PARTICULARLY AMONG ASIAN DESTINATIONS, WITH EUROPEAN DESTINATIONS ALSO SHOWING HIGH LEVELS.

DESTINATIONS OF INTEREST TO VISIT IN NEXT 3 YEARS



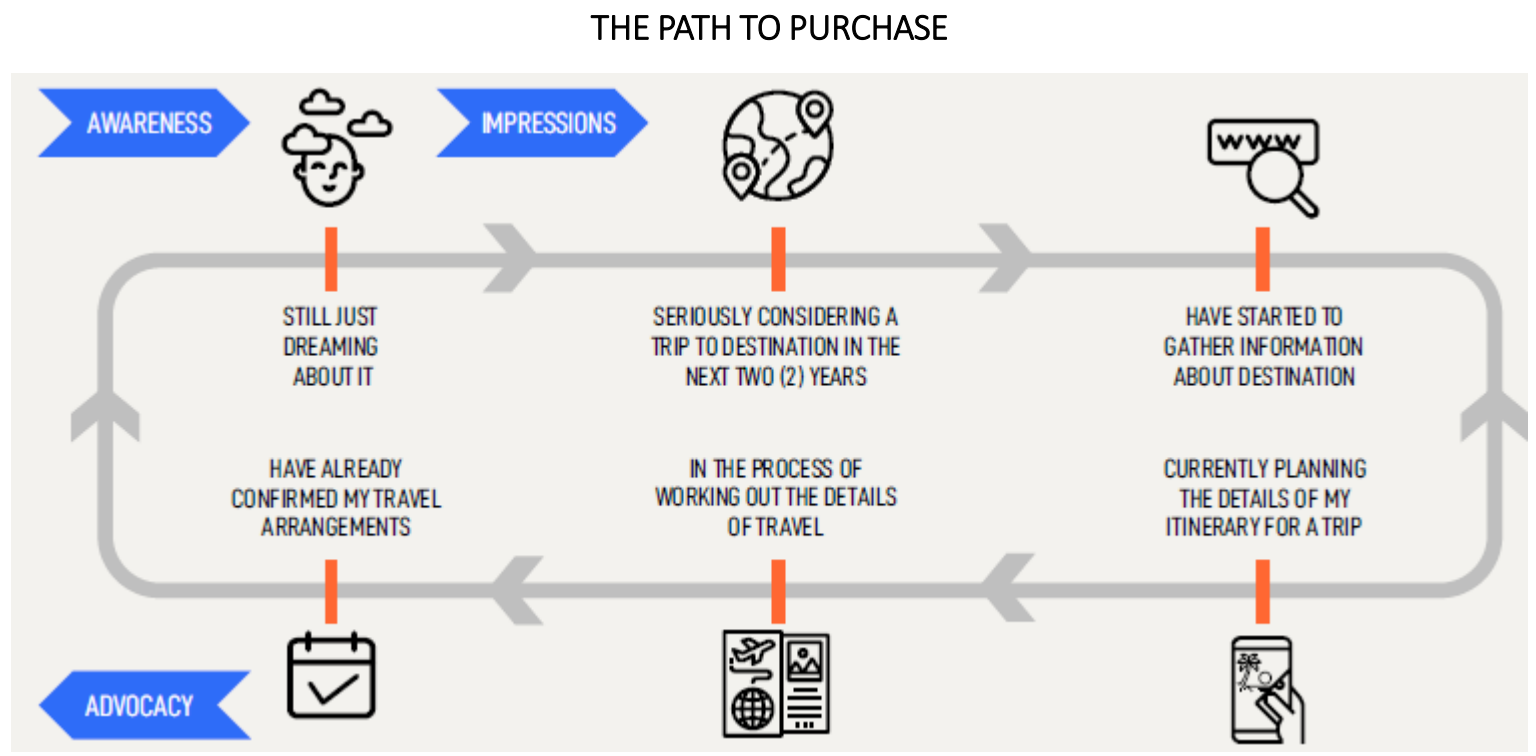
% selected

SOURCE MARKETS

| | Total | Australia | China | France | Germany | India | Japan | South Korea | UK | USA |
|-------------|-------|-----------|-------|--------|---------|-------|-------|-------------|----|-----|
| USA | 14 | 19 | 12 | 8 | 14 | 21 | 20 | 22 | 15 | 0 |
| Italy | 11 | 10 | 5 | 16 | 15 | 7 | 9 | 8 | 15 | 18 |
| Japan | 10 | 20 | 16 | 8 | 5 | 7 | 0 | 29 | 5 | 7 |
| Spain | 10 | 3 | 2 | 16 | 21 | 3 | 4 | 6 | 24 | 8 |
| France | 9 | 8 | 12 | 0 | 7 | 6 | 9 | 8 | 13 | 15 |
| Australia | 7 | 0 | 8 | 4 | 6 | 14 | 9 | 10 | 8 | 8 |
| Canada | 6 | 9 | 2 | 10 | 4 | 10 | 4 | 5 | 5 | 8 |
| Singapore | 6 | 11 | 9 | 0 | 1 | 18 | 4 | 6 | 2 | 1 |
| New Zealand | 6 | 23 | 5 | 1 | 3 | 5 | 3 | 3 | 3 | 5 |
| Greece | 6 | 6 | 1 | 8 | 14 | 1 | 0 | 1 | 13 | 6 |

WHEN MAPPING LEVELS OF INTEREST AND AMBITION TO TRAVEL TO YOUR DESTINATION, UNDERSTANDING THE TRAVELLER PATH TO PURCHASE CAN BE CRITICAL.

THE TRAVELLER PATH TO PURCHASE



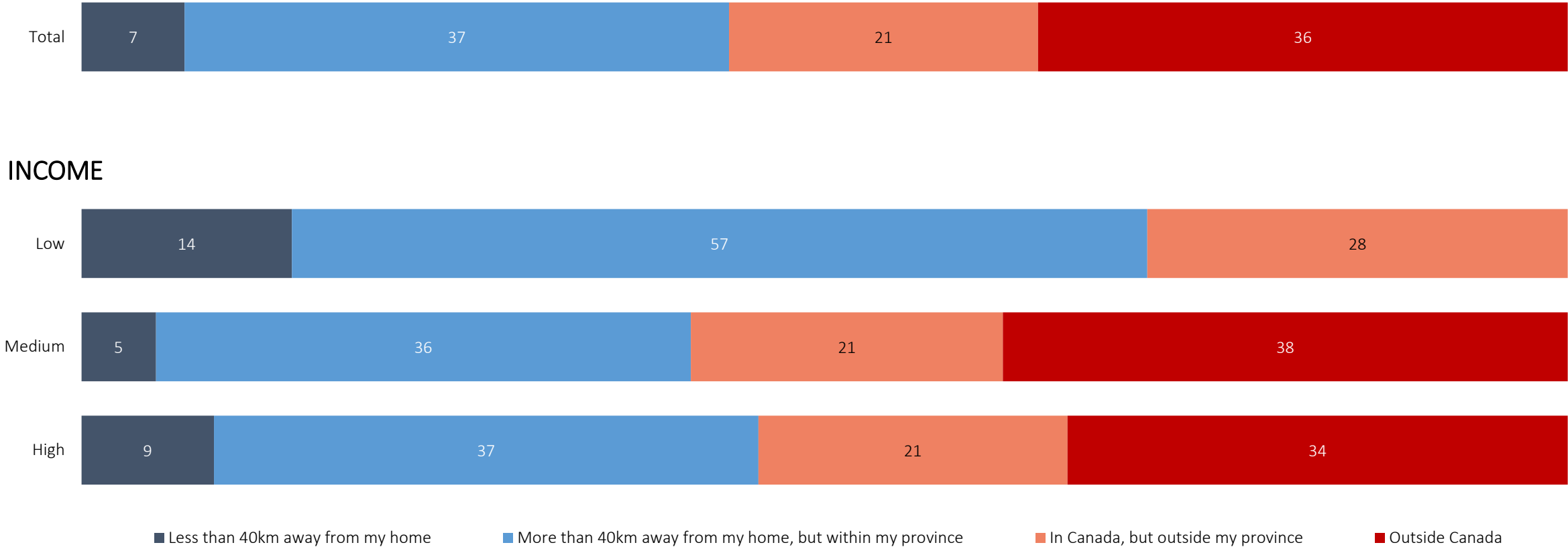
KEY IMPLICATIONS

- Understanding the path to purchase is essential to define a more granular understanding of both barriers and opportunities to enhance the consumer journey and increase visitation through targeted marketing and destination branding initiatives.
- The purpose of a granular understanding of the path to purchase is to enhance the role that the destination brand can play in converting some basic level of awareness or slight interest, into bookings and the post-trip advocacy role.
- This involves the understanding that, at the level of the individual traveler, the greatest impact on the destination brand will be made by the traveler through their interactions with others.
- More distinctly, it is an opportunity to create engagement with a destination brand – the first steps on the path to generating traveller advocacy.

MIDDLE INCOME CANADIANS SHOW THE HIGHEST LEVEL OF AMBITIONS FOR INTERNATIONAL TRAVEL WITHIN 2 YEARS WITH THE LOW-INCOME BRACKET PRIORITISING NEARBY TRAVEL.

Recent Proprietary
Twenty31 Market
Research

CANADIAN TRAVEL AMBITIONS IN THE NEXT 2 YEARS



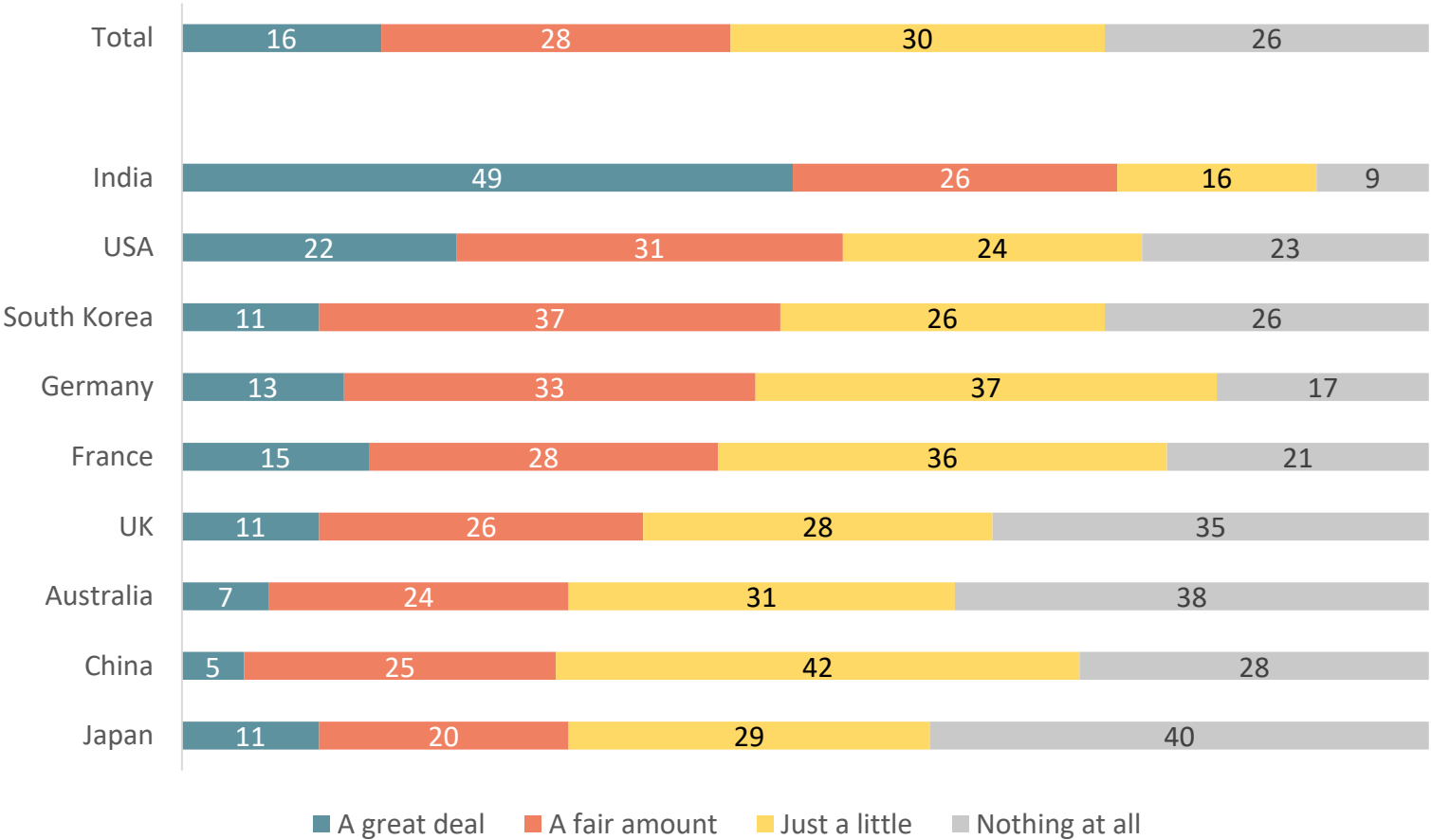


Section 4: Traveller Perspectives on Travel Service Issues post-COVID

- Familiarity with service issues in the tourism industry
- Perceived importance of quality service in domestic and international travel
- Influential factors in destination selection
- Impact of service disruption on destination selection across markets

INDIANS AND AMERICANS REPORT THE HIGHEST LEVELS OF FAMILIARITY WITH SERVICE DISRUPTION DUE TO STAFF SHORTAGES IN THE TOURISM INDUSTRY, THOUGH RESULTS ARE HIGHLY VARIABLE.

FAMILIARITY WITH PREVALANCE OF TRAVEL SERVICE ISSUES

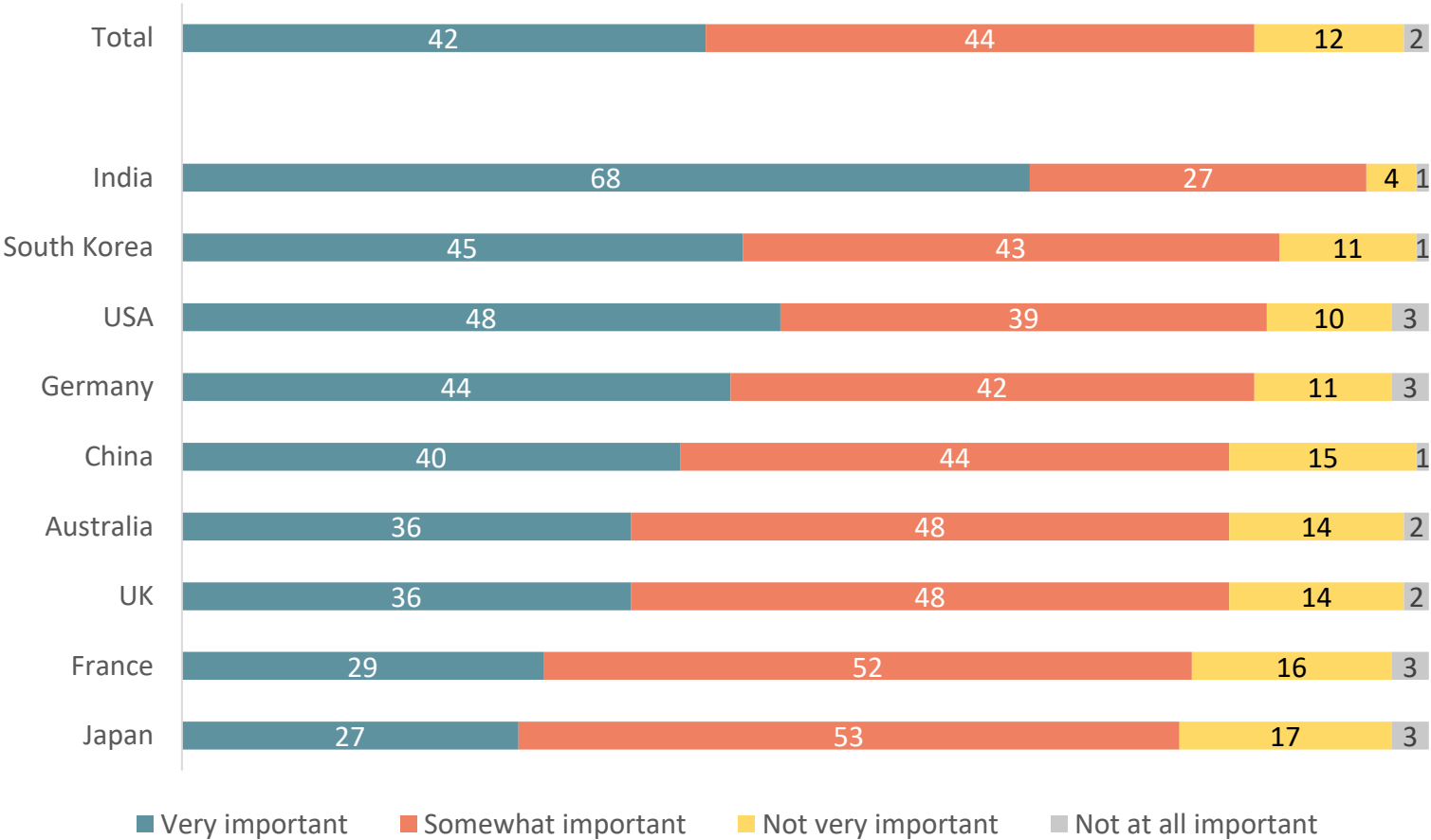


KEY IMPLICATIONS

- Self-reported familiarity with issues of service disruption in the tourism industry vary across source markets, with Indians highly familiar and China, Japan, and Australia reporting much lower levels.
- Almost half in India report “a great deal” of familiarity with lack of staff training in travel and tourism.
- The UK, Australia, and Japan show the highest proportions that report no familiarity at all with these issues, though this is also consistent with constrained travel opportunities in both the UK and Australia.
- The USA tracks the global result fairly closely but with higher proportions than the average reporting “a great deal” of familiarity.

WHEN CONSIDERING DOMESTIC TRAVEL, INDIANS, KOREANS, AMERICANS, AND GERMANS PRIORITIZE HIGH QUALITY SERVICE FROM TRAINED STAFF ABOVE OTHER MARKETS.

IMPORTANCE OF QUALITY SERVICE IN DOMESTIC TRAVEL

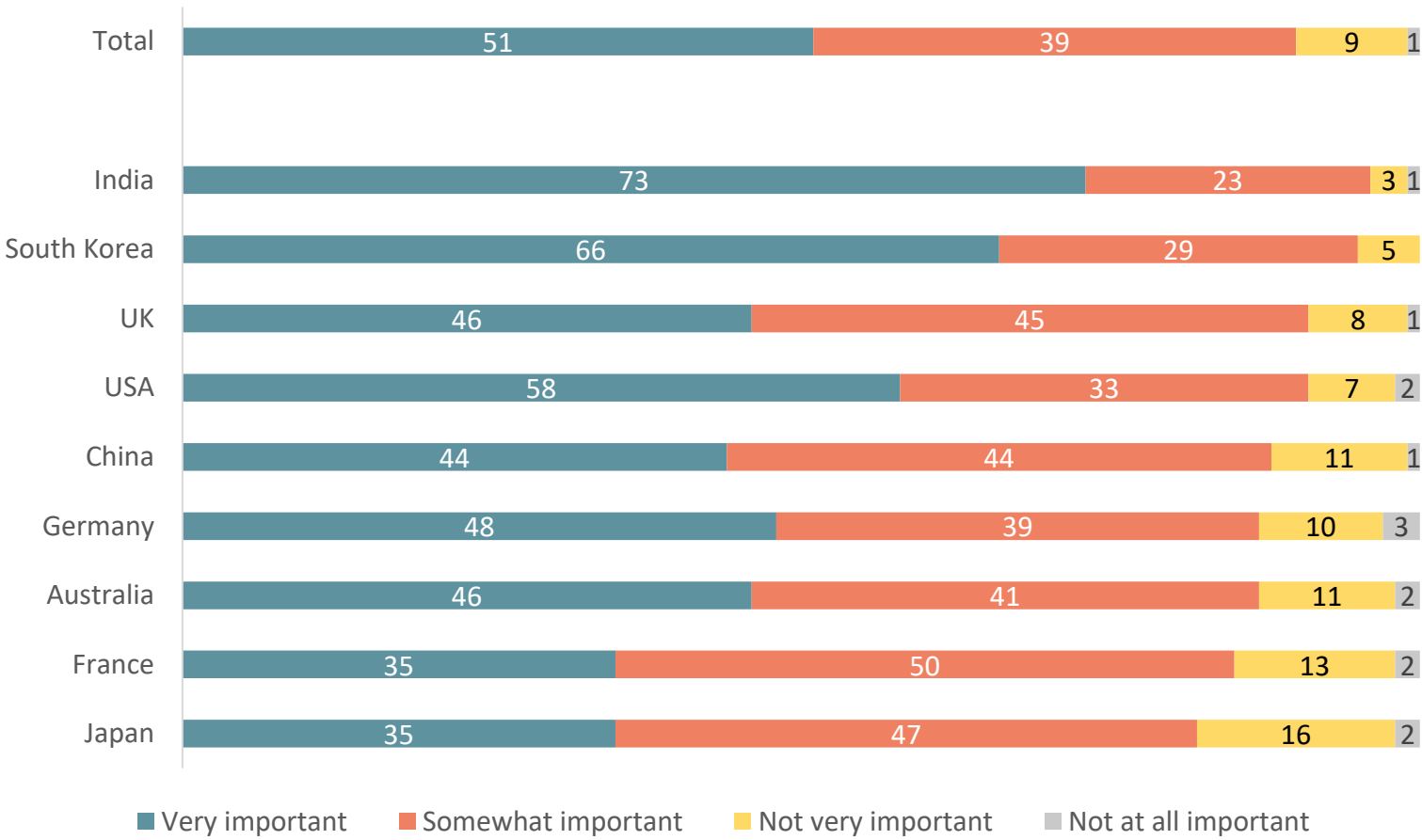


KEY IMPLICATIONS

- In terms of domestic travel, 42% overall consider the level of quality service as “very important” when selecting a destination.
- Only 12% globally consider this factor “not very important” and only 2% “not important at all”.
- This result is most pronounced in India with 68% considering it “very important”.
- Japan and France show the least strong opinions on this with only 27% and 29% respectively considering it “very important”.

TRAVELLERS PLACE SIMILAR IMPORTANCE ON SERVICE DELIVERY FOR INTERNATIONAL TRAVEL AS WITH DOMESTIC TRAVEL, THOUGH IT IS SOMEWHAT MORE IMPORTANT IN THIS CASE.

IMPORTANCE OF QUALITY SERVICE IN INTERNATIONAL TRAVEL

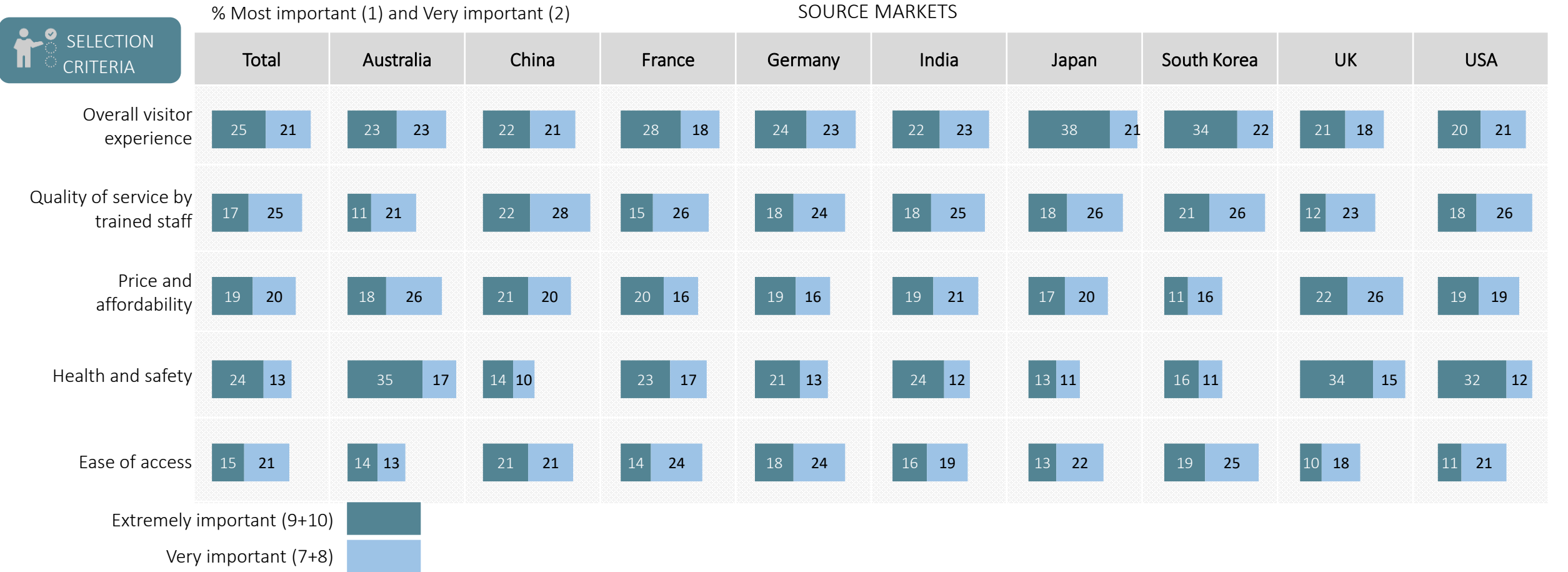


KEY IMPLICATIONS

- Unsurprisingly given the greater cost and logistical implications, the already high consideration given to quality service is even more pronounced when considering international travel.
- Over half of the global sample consider this “very important” and 39% “somewhat important”.
- Once again, Japan and France are the least focused on this considering though in both cases 35% consider it “very important”.

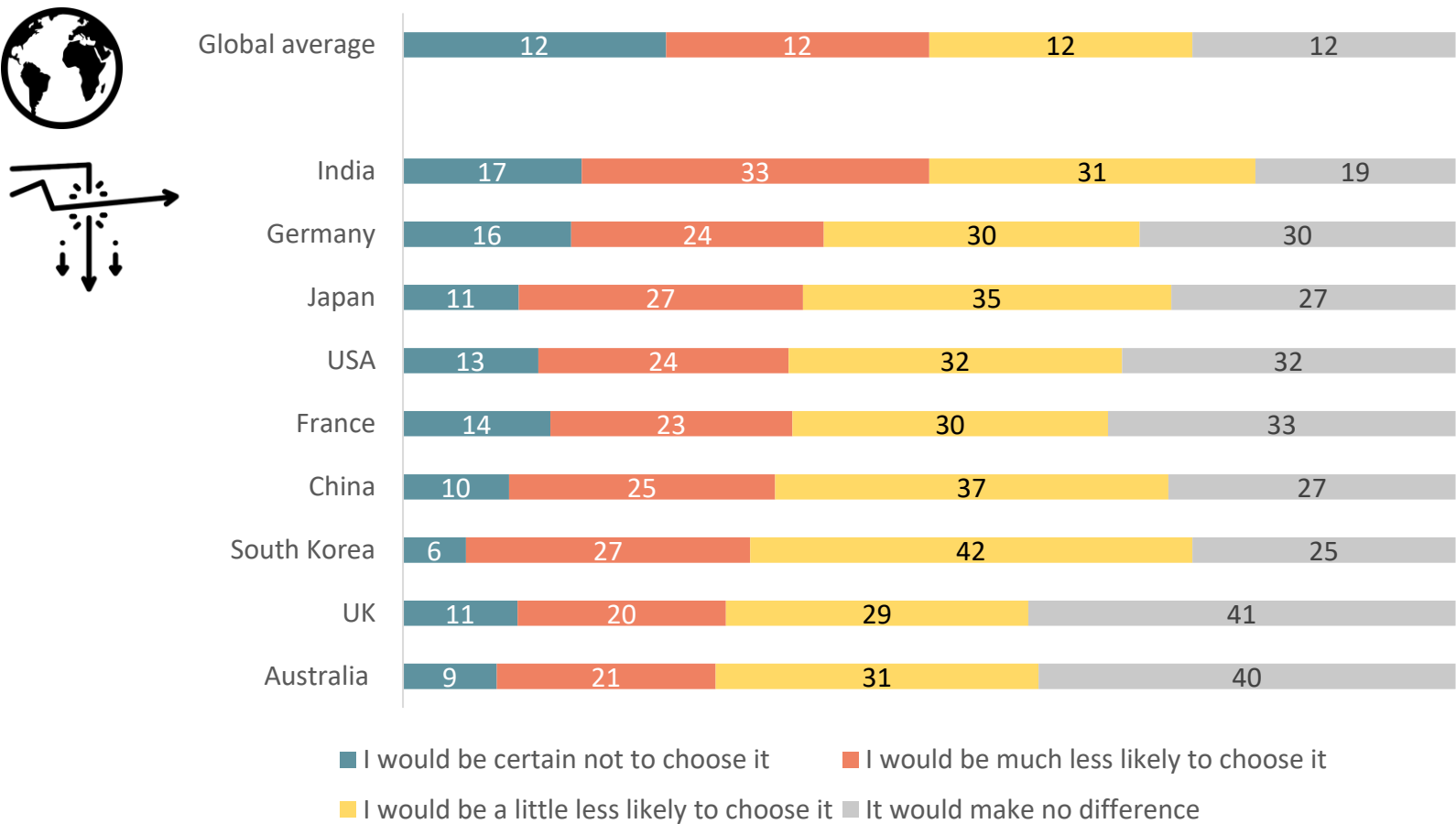
THE OVERALL VISITOR EXPERIENCE IS THE HIGHEST PRIORITY OVERALL IN DESTINATION SELECTION, FOLLOWED BY SERVICE QUALITY, HOWEVER SAFETY CONCERNS VARY A GREAT DEAL ACROSS MARKETS.

RELATIVE IMPORTANCE ISSUES IN DESTINATION SELECTION



INDIA AND GERMANY ARE MOST IMPACTED BY SERVICE DISRUPTION IN DESTINATION SELECTION.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY BY COUNTRY

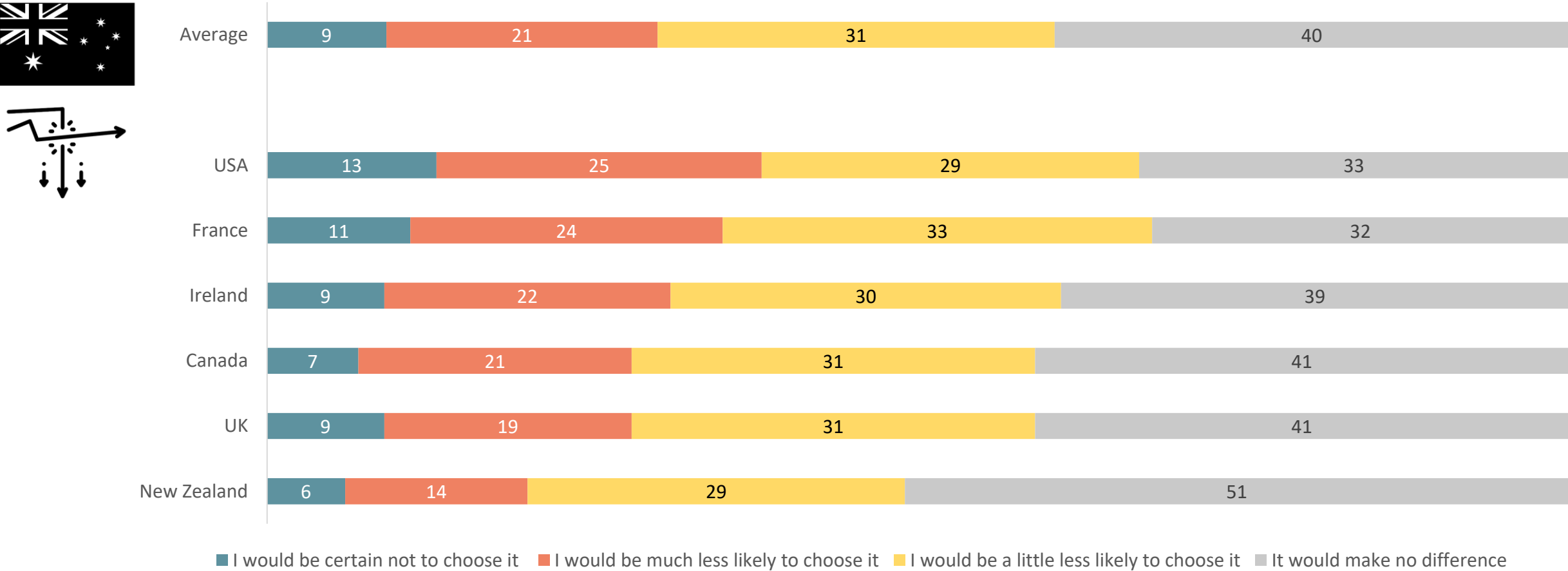


KEY IMPLICATIONS

- Looking at the overall impact of service disruptions caused by a lack of trained staff in tourism businesses, Indians are the most impacted at the global aggregate level.
- Germany, Japan, and USA follow India in terms of overall impact.
- South Korea is notable as showing the lowest levels overall of those who report that service disruption would result in being certain not to choose a destination.
- The UK and Australia show among the lowest impact and the highest proportions that report that it would “make no difference”.

AMONG AUSTRALIANS, SERVICE DISRUPTION IS MOST IMPACTFUL WHEN CONSIDERING TRAVEL TO THE USA BUT AMONG THE LOWEST RELATIVE IMPACT ON CONSIDERATION OF CANADA.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - AUSTRALIA



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

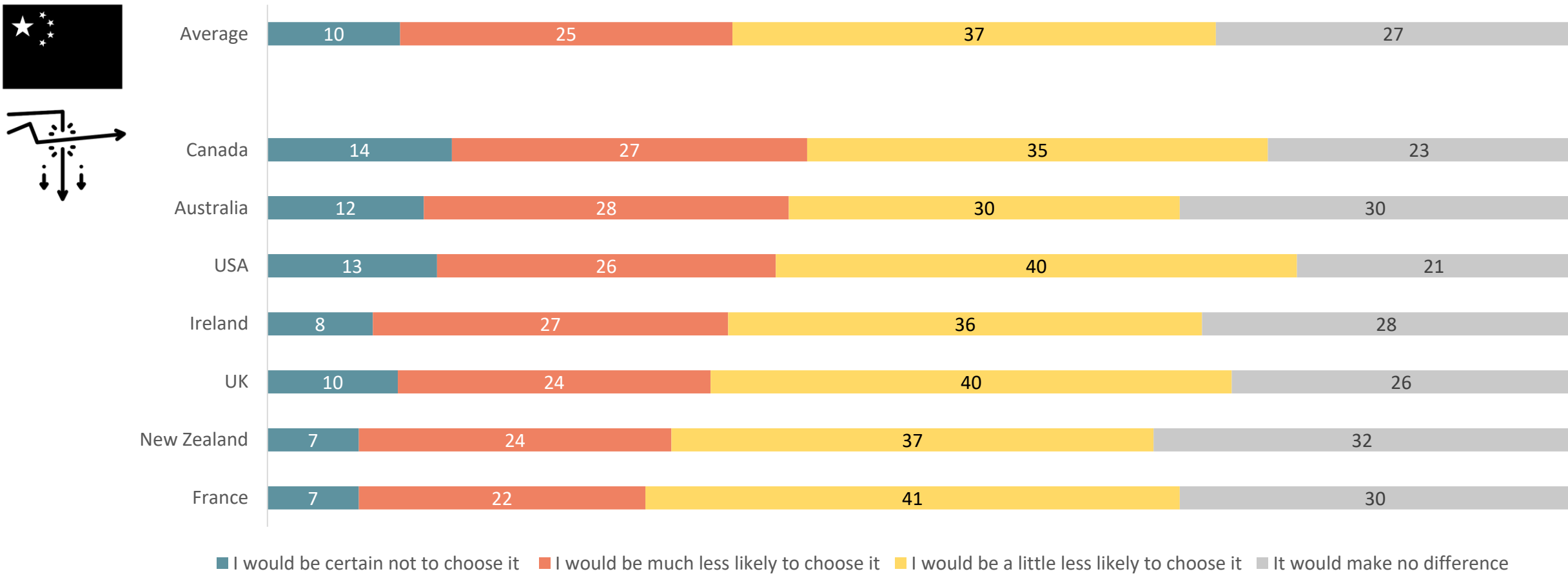
Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

SERVICE DISRUPTION IS MOST IMPACTFUL ON CONSIDERATION OF CANADA AMONG CHINESE TRAVELLERS, WELL ABOVE AVERAGE.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - CHINA



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

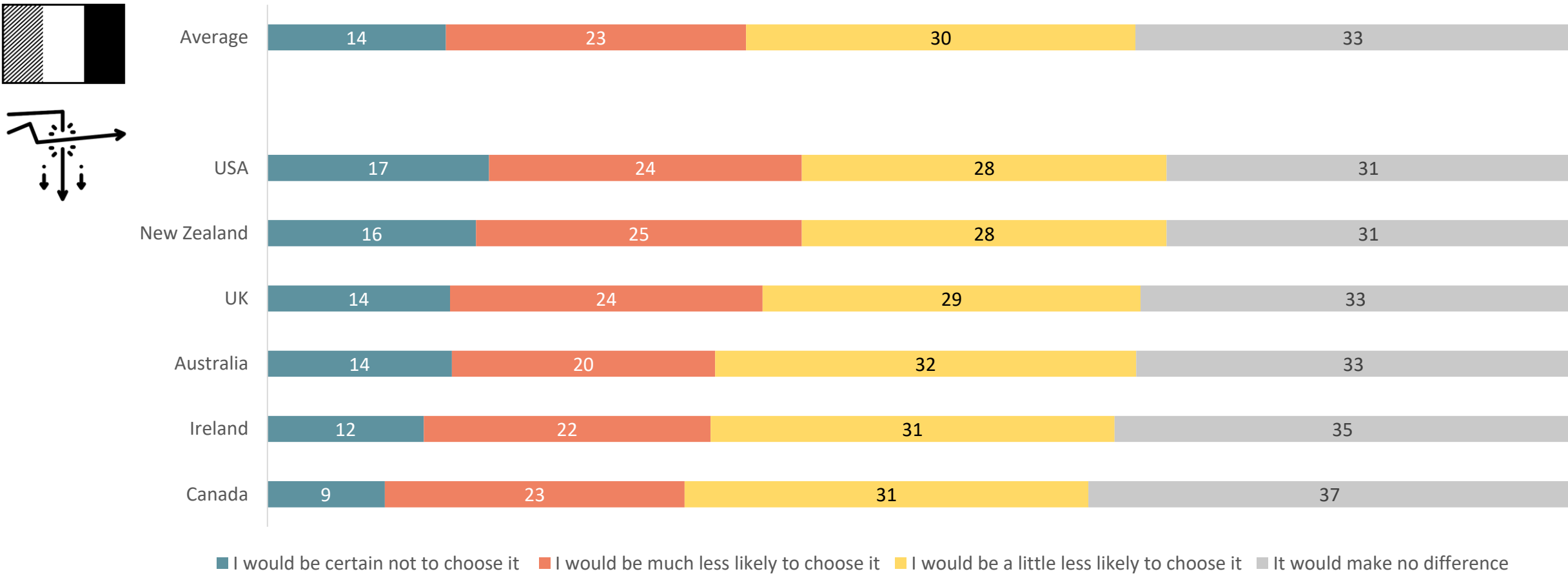
Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

CANADA ENJOYS THE LOWEST LEVEL OF IMPACT OF CONSIDERATION DUE TO SERVICE DISRUPTION AMONG FRENCH TRAVELLERS, CONSISTENT WITH HISTORICAL AND LINGUISTIC CONNECTIONS.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - FRANCE



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

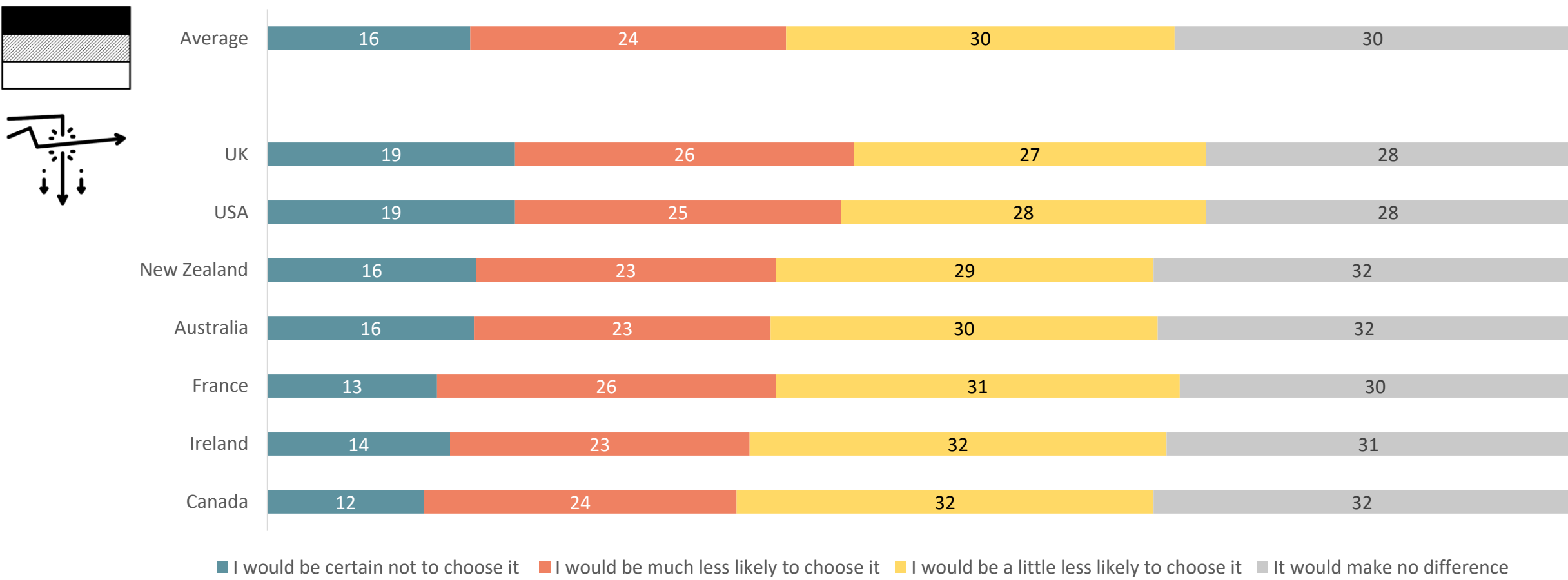
Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

DESPITE RELATIVE PROXIMITY, SERVICE DISRUPTION IS MOST IMPACTFUL FOR CONSIDERATION OF THE UK IN GERMANY, WITH CANADA ENJOYING THE LOWEST IMPACT.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY – GERMANY



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

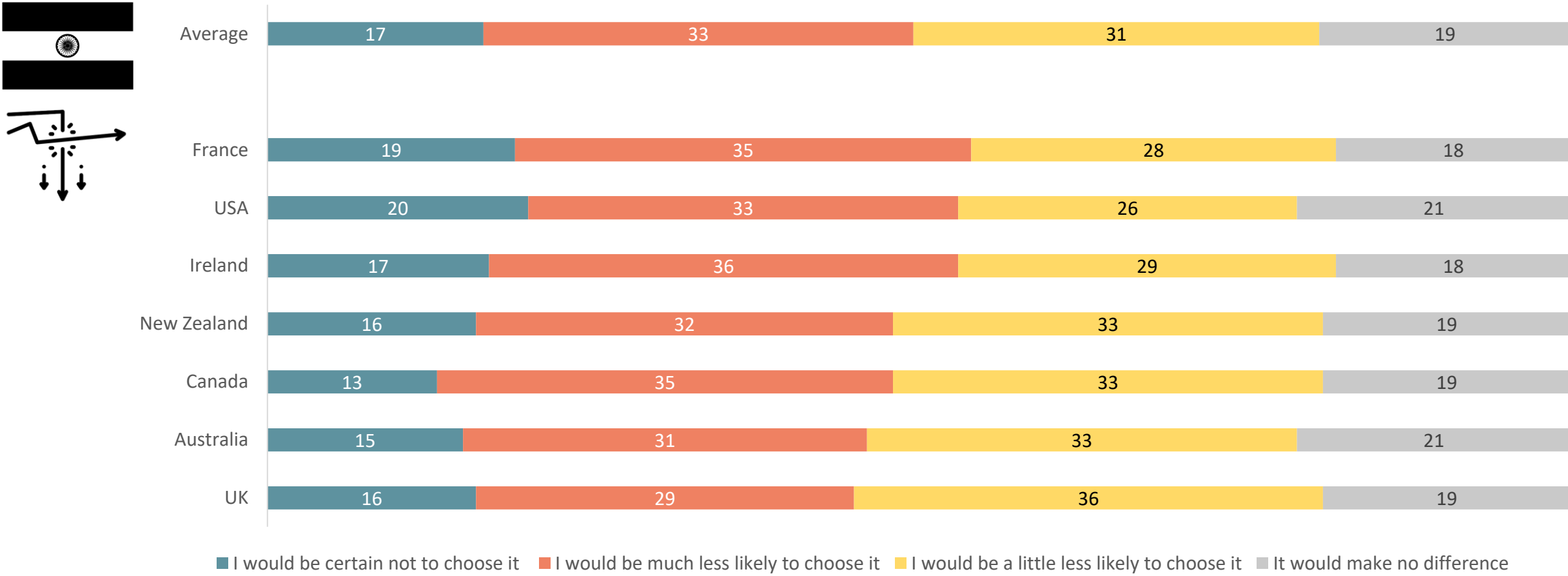
Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

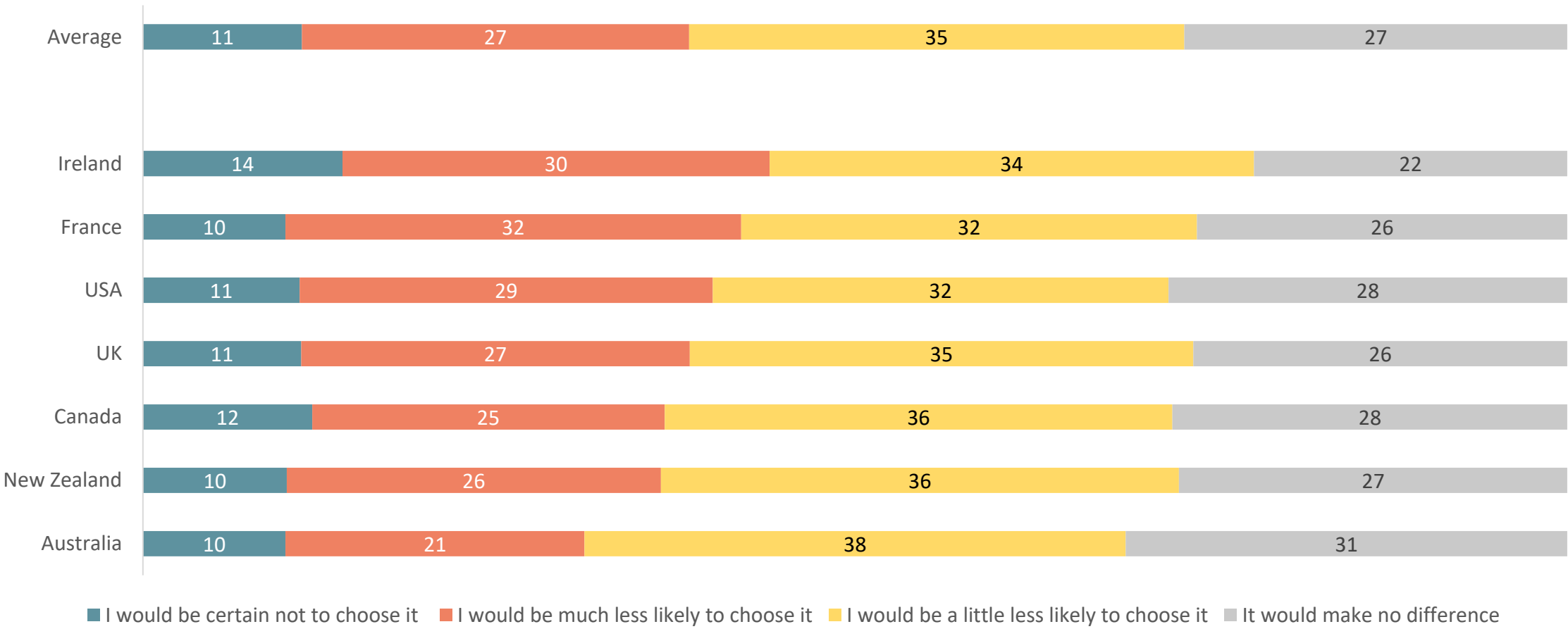
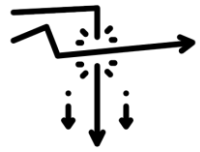
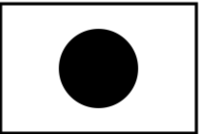
INDIANS ARE AMONG THE MOST CONCERNED ABOUT SERVICE DELIVERY IN DESTINATION SELECTION,
HOWEVER CANADA ALONG WITH AUSTRALIA AND THE UK ENJOYS AMONG THE LOWEST IMPACT.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - INDIA



ALMOST ONE-THIRD OF JAPANESE REPORT NO IMPACT AT ALL OF SERVICE DISRUPTION IN DESTINATION SELECTION WITH CANADA SHOWING AMONG THE LOWEST IMPACT.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - JAPAN



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

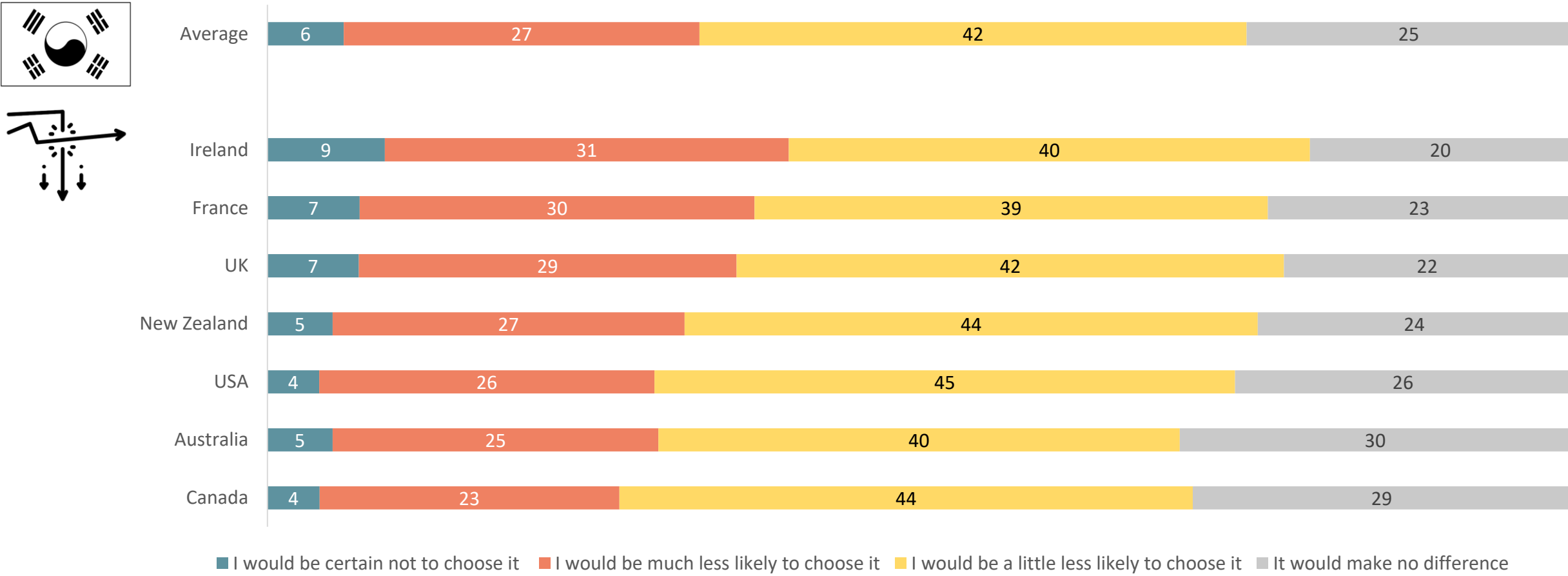
Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

CANADA SHOWS THE LOWEST LEVEL OF IMPACT OF SERVICE DELIVERY ON DESTINATION SELECTION AMONG SOUTH KOREANS.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY – SOUTH KOREA



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

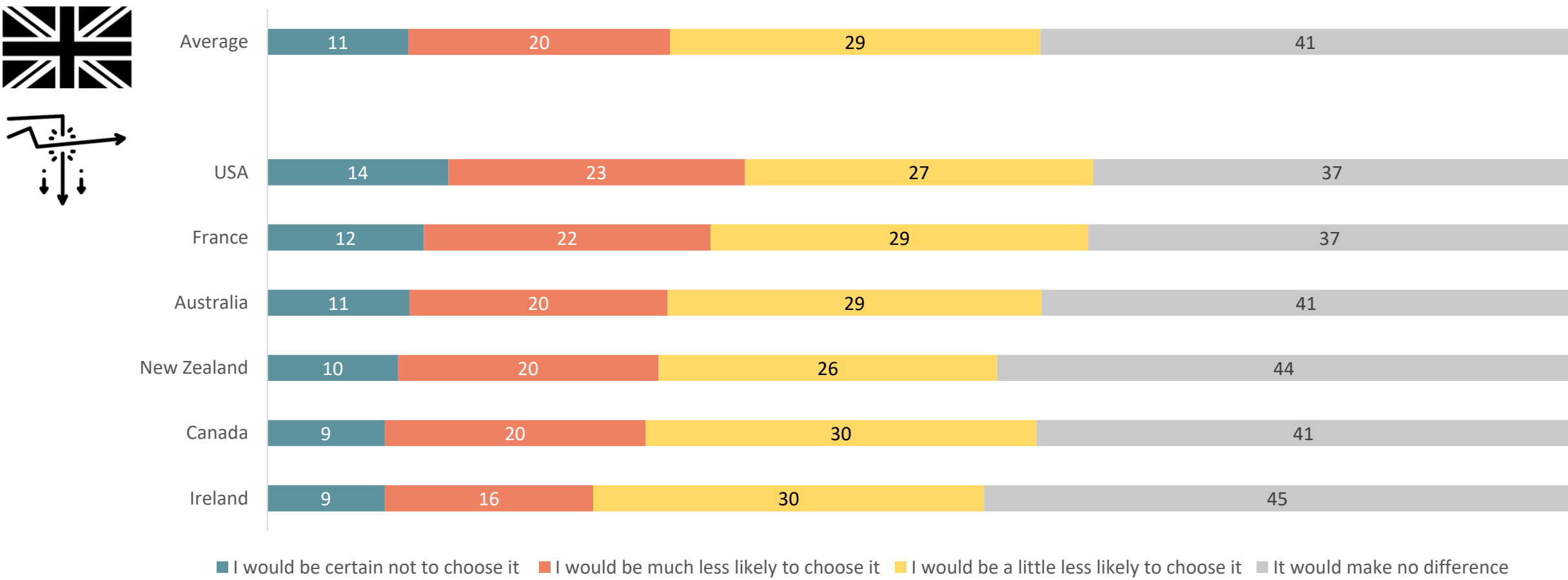
Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

CANADA ENJOYS AMONG THE LOWEST IMPACT OF SERVICE DISRUPTION ON DESTINATION SELECTION IN THE UK, COMPETING CLOSELY WITH IRELAND DESPITE THE DIFFERENCE IN PROXIMITY.

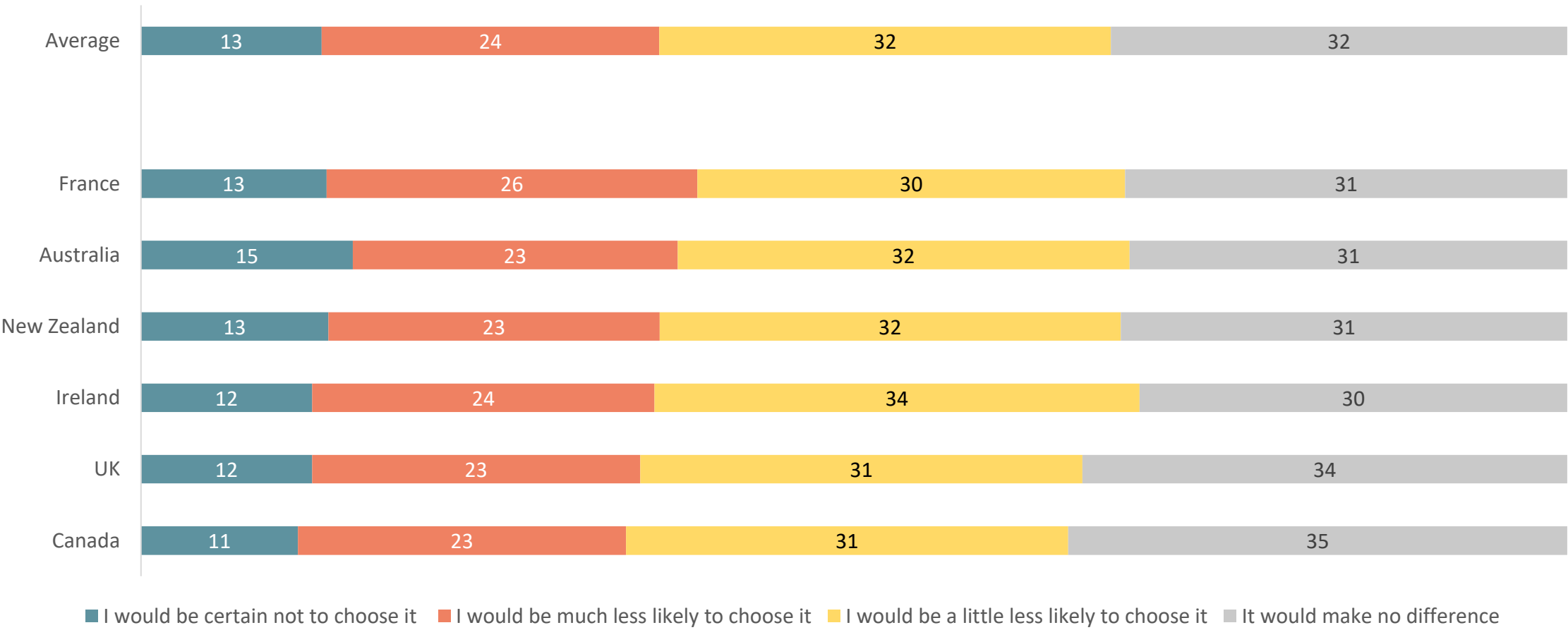
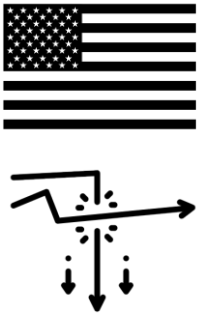
IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - UK



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.
Total n=6838
Base: All Respondents
4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

AMERICANS ARE LESS INFLUENCED BY SERVICE DELIVERY IN CANADA THAN ANY OTHER DESTINATIONS WHEN IT COMES TO DESTINATION SELECTION.

IMPACT OF SERVICE DISRUPTION ON DESTINATION DESIRABILITY - USA



Base per country: Australia n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803.

Total n=6838

Base: All Respondents

4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

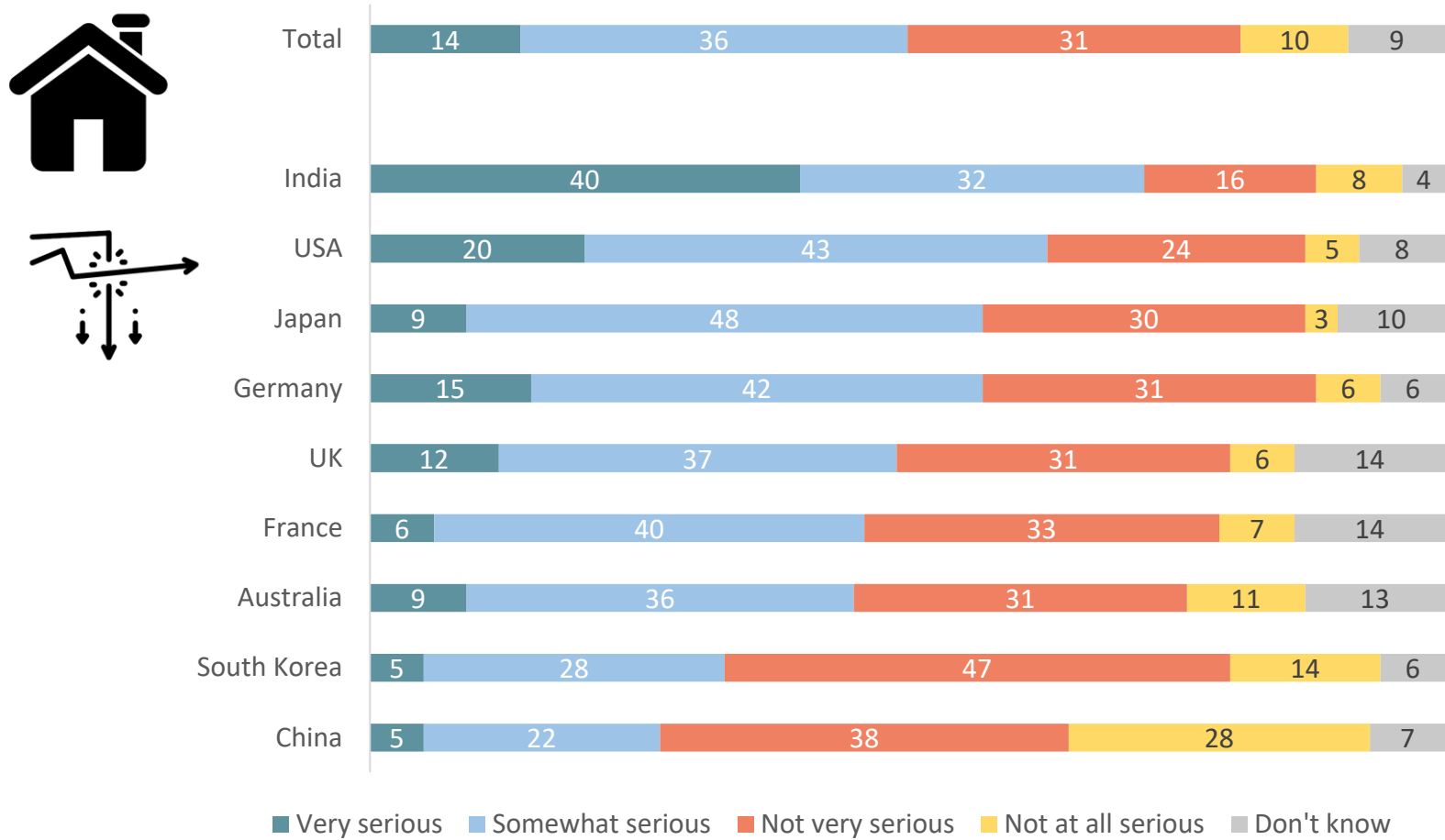


Section 5: Perceptions and Impact of Service Delivery in Canada vs. Other Destinations

- Perceived seriousness of service disruption in respondents' home countries
- Perceived seriousness of service disruption in Canada

IN TERMS OF PERCEPTIONS OF SERVICE DISRUPTION AT HOME, INDIA, THE USA, JAPAN, AND GERMANY ARE THE MOST SELF-CRITICAL WITH CHINA SHOWING THE LOWEST LEVELS.

PERCEIVED SERIOUSNESS OF SERVICE DISRUPTION AT HOME

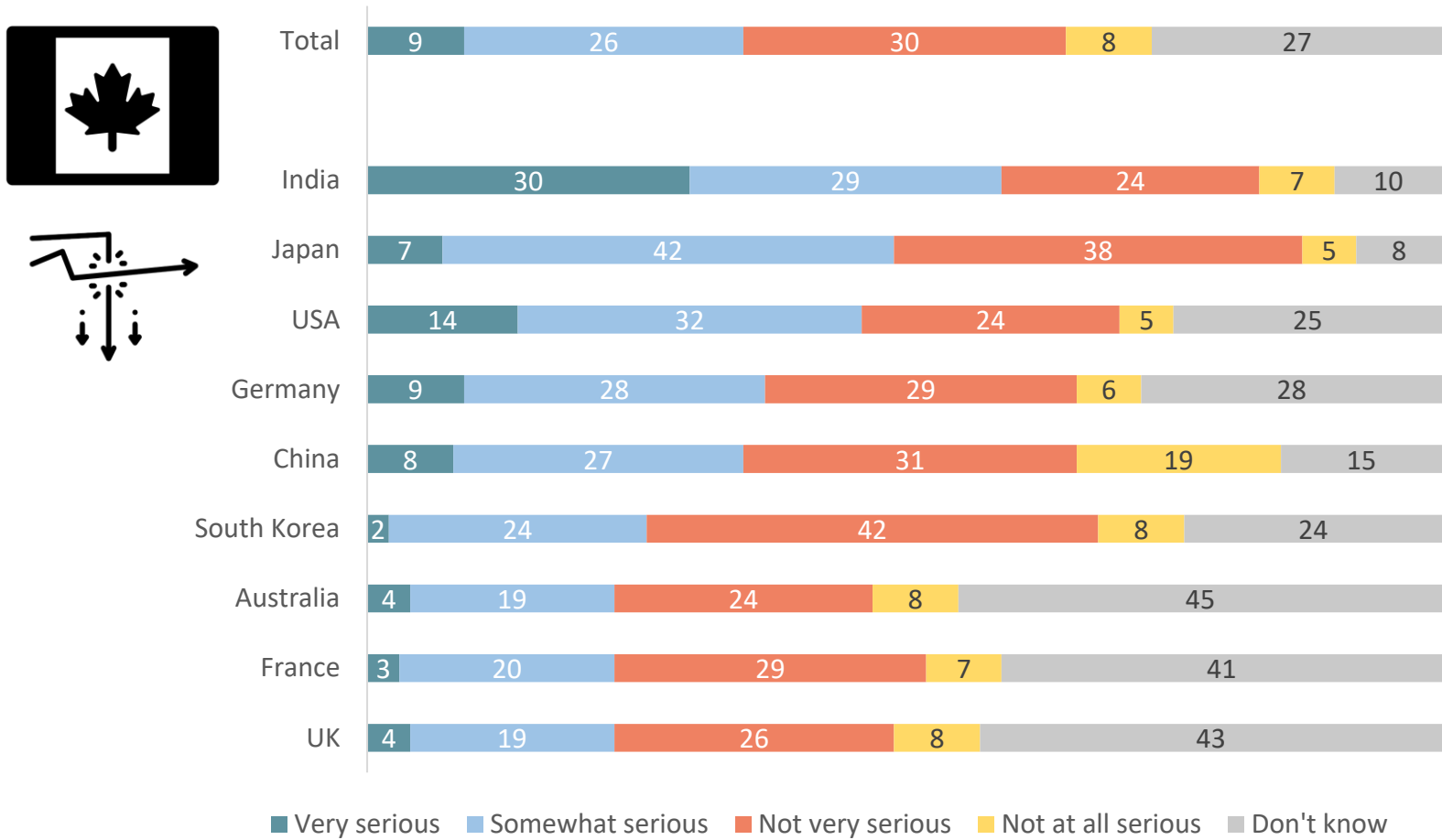


KEY IMPLICATIONS

- On average, the global sample perceive service disruption issues as being more serious in their own countries than in Canada – though this is likely driven by higher familiarity and exposure.
- China and South Korea are the least self-critical markets when it comes to perceptions of service disruption in their home countries.
- India shows the highest perceptions of seriousness of service disruption issues at home – however this is consistent with strong responses across the board.
- Following India, the USA, Japan, and Germany show the highest levels of self-criticism with regard to service disruption.

THE UK, FRANCE, AND AUSTRALIA PLACE THE LEAST EMPHASIS ON SERVICE DISRUPTION IN CANADA, WITH INDIA, JAPAN, AND THE USA TOPPING THE LIST.

PERCEIVED SERIOUSNESS OF SERVICE DISRUPTION IN CANADA



KEY IMPLICATIONS

- As with other measures related to service disruption, India shows the highest levels of perceived seriousness of service disruption in Canada.
- While Canada is least affected by perceptions of serious service disruption among the USA sample, the USA still shows among the highest perceived seriousness of this disruption in Canada.
- The UK, France, and the UK show the lowest levels of perceived service disruption in Canada.
- South Korea, followed by France, the UK, and Australia notably show the smallest proportions who consider these issues “very serious” in Canada.

A woman with dark hair, wearing a white long-sleeved shirt and a black vest, is working behind a bar. She is looking down at a tray with several glasses on it. The bar has a dark wooden surface and various items like a bottle of orange juice and a glass of water. The background is slightly blurred, showing other parts of the bar and some equipment.

Section 6: Impact of Familiarity with Service Issues

- Likelihood to select destinations by familiarity with service issues
- Perceptions of seriousness of service disruption in home country by familiarity
- Perceptions of seriousness of service disruption in Canada by familiarity

THERE IS A CLEAR LINK BETWEEN HIGHER LEVELS OF FAMILIARITY WITH SERVICE DISRUPTION ISSUES AND A DISINCLINATION TO SELECT DESTINATIONS AS A RESULT OF THEM.

LIKELIHOOD TO SELECT DESTINATIONS BY FAMILIARITY WITH SERVICE ISSUES, GLOBAL



| | | SOURCE MARKETS | | | | | | |
|----------------|--|----------------|--------|-----------|---------|-------|-------------|--------|
| | | USA | Canada | Australia | Ireland | UK | New Zealand | France |
| Total | | 13 23 | 10 25 | 11 21 | 11 26 | 11 22 | 11 24 | 10 24 |
| A great deal | | 19 24 | 13 30 | 15 27 | 15 30 | 15 26 | 16 30 | 16 29 |
| A fair amount | | 10 28 | 10 27 | 11 23 | 11 28 | 10 24 | 10 27 | 9 25 |
| Just a little | | 11 22 | 9 23 | 10 19 | 10 25 | 10 21 | 10 21 | 8 23 |
| Nothing at all | | 13 19 | 10 20 | 10 17 | 11 21 | 11 18 | 11 20 | 11 20 |

Certain not to choose it

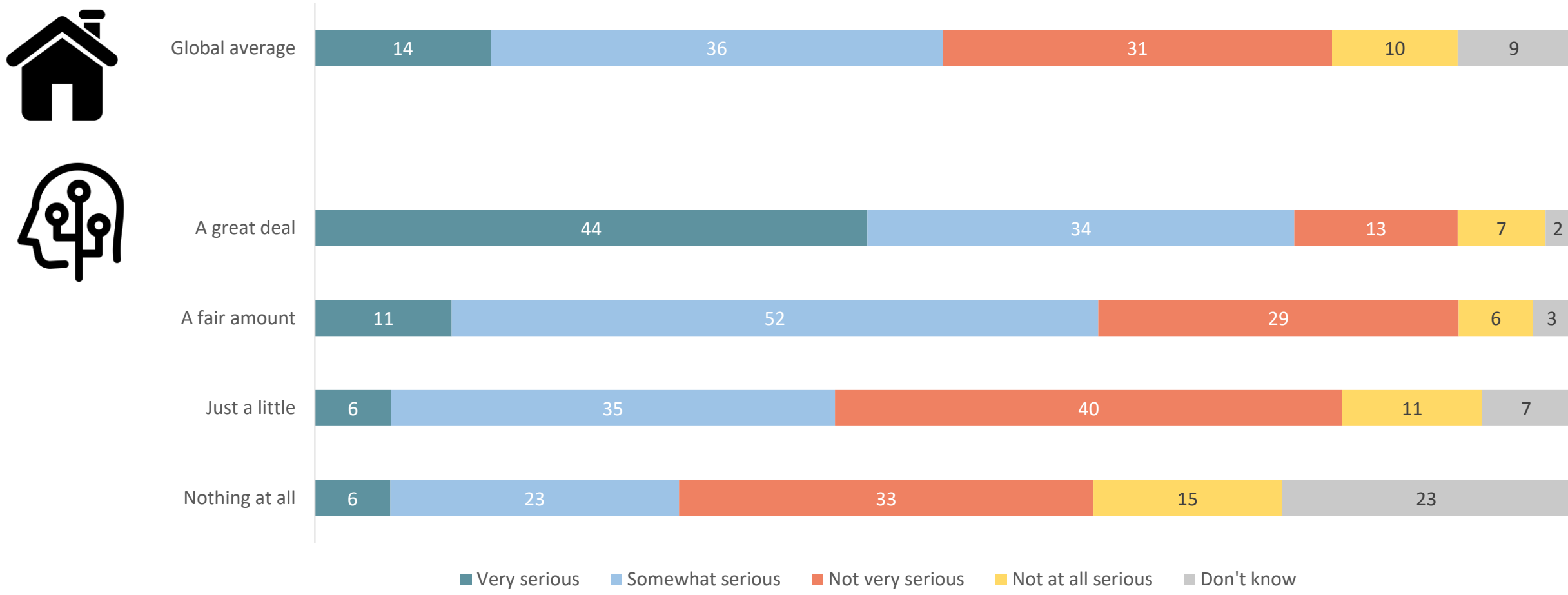
Much less likely to choose it

KEY IMPLICATIONS

- At the global level, respondents who profess a “great deal” of familiarity with the prevalence of service disruption issues in the travel and tourism industry are considerably more likely to be put off selecting a destination to travel to as a result of these issues.
- The USA shows the highest level of respondents who would be “certain” not to select it as a destination in the event of service issues, followed by France and New Zealand.
- This overall pattern is fairly consistent across destinations, though it is particularly pronounced for New Zealand, Ireland, and France.

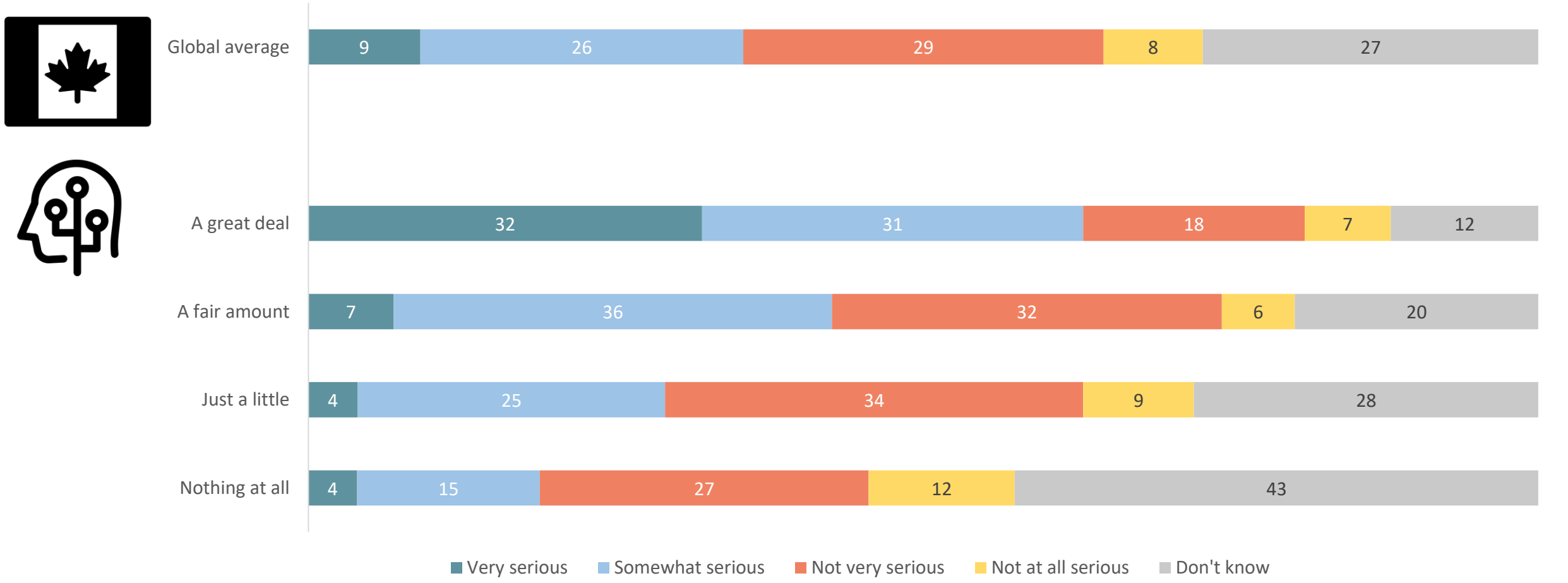
GREATER FAMILIARITY WITH SERVICE DISRUPTION ISSUES HAS A CONSIDERABLE IMPACT ON PERCEPTIONS OF THEIR SERIOUSNESS IN HOME COUNTRIES.

PERCEPTION OF SERIOUSNESS OF SERVICE DISRUPTION ISSUES IN CANADA BY FAMILIARITY WITH ISSUES, GLOBAL



THE CONNECTION BETWEEN FAMILIARITY WITH SERVICE DISRUPTION ISSUES AND PERCEPTIONS OF SERIOUSNESS FOLLOWS A SIMILAR BUT LESS PRONOUNCED PATTERN WITH REGARD TO CANADA.

PERCEPTION OF SERIOUSNESS OF SERVICE DISRUPTION ISSUES IN HOME COUNTRY BY FAMILIARITY WITH ISSUES, GLOBAL

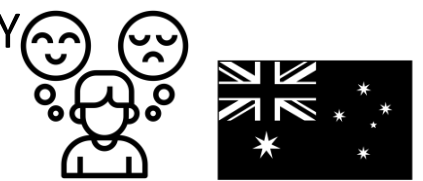


A group of people are gathered in a meeting. A woman with a braid, wearing a white shirt, is pointing her right hand towards a man in a blue shirt. The man is looking at her. Other people are visible in the background, some looking towards the camera and others looking away. The background is a wall with a pattern of green and brown leaves.

Section 7: Country Attitudinal Profiles

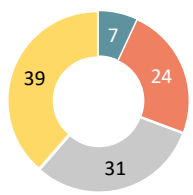
- Perceptions and priorities of source markets

AUSTRALIANS SHOW AMONG THE HIGHEST CONCERN FOR HEALTH AND SAFETY WITH QUALITY OF SERVICE HAVING RELATIVELY LOW IMPACT PARTICULARLY IN THE CASE OF CANADA.



ATTITUDINAL PROFILE - AUSTRALIA

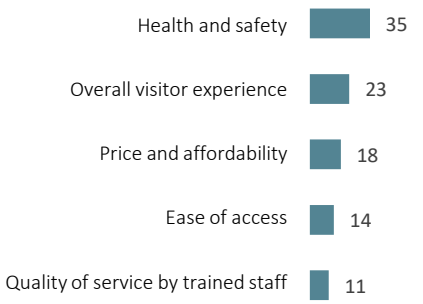
Familiarity with prevalence of travel service issues



■ A Great Deal ■ A Fair Amount ■ Just a Little ■ Nothing at all

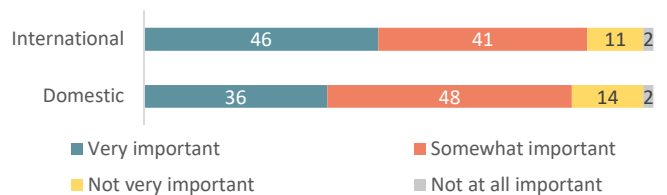
1. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Relative importance issues in destination selection



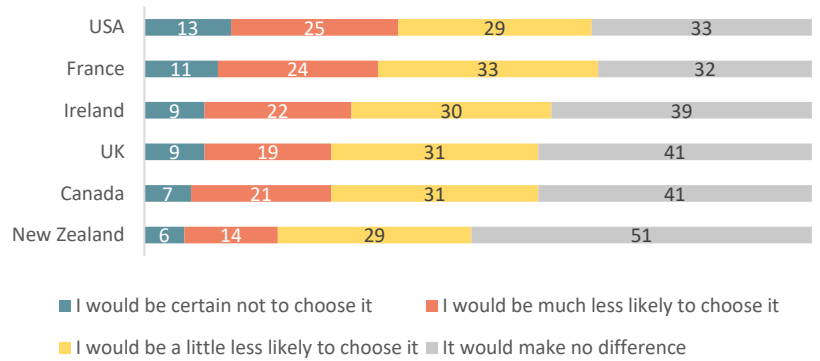
3A-E. And how important is the issue of high quality service delivered by trained staff in tourism businesses to you when you choose a destination compared to other factors? Please drag and drop the following issues, placing them in order of importance to you, where 1 is most important and 5 is least important.

Importance of quality service



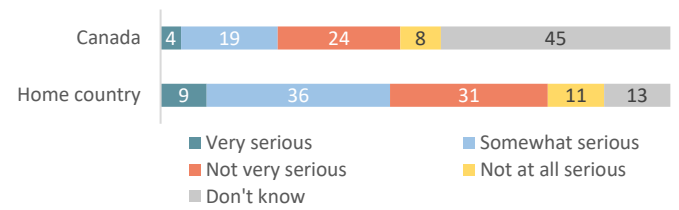
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



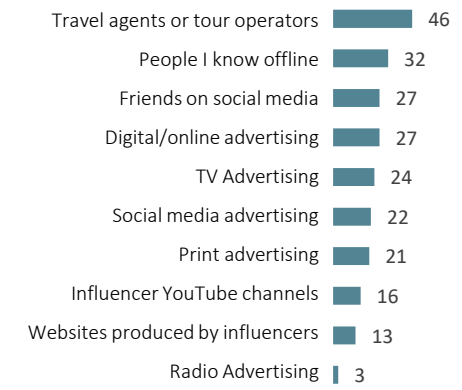
Q4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

Perceived seriousness of service disruption



5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence



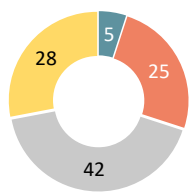
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.



IN CHINA, CANADA IS MOST IMPACTED BY POTENTIAL PERCEPTIONS OF SERVICE DISRUPTION, ALTHOUGH OVERALL VISITOR EXPERIENCE IS THE MAIN CONSIDERATION.

ATTITUDINAL PROFILE - CHINA

Familiarity with prevalence of travel service issues



■ A Great Deal ■ A Fair Amount ■ Just a Little ■ Nothing at all

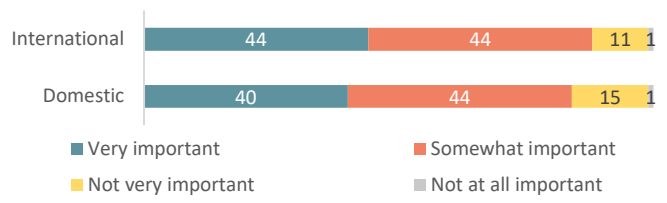
1. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Relative importance issues in destination selection



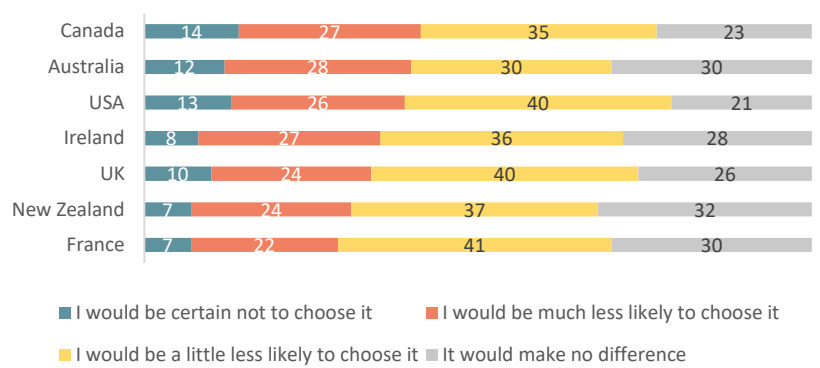
3A-E. And how important is the issue of high quality service delivered by trained staff in tourism businesses to you when you choose a destination compared to other factors? Please drag and drop the following issues, placing them in order of importance to you, where 1 is most important and 5 is least important.

Importance of quality service



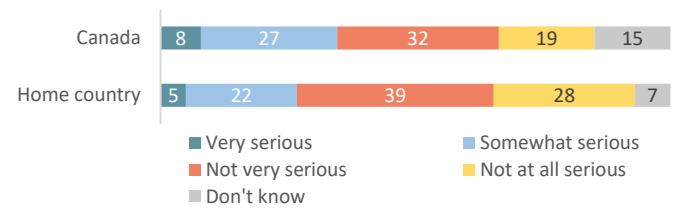
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



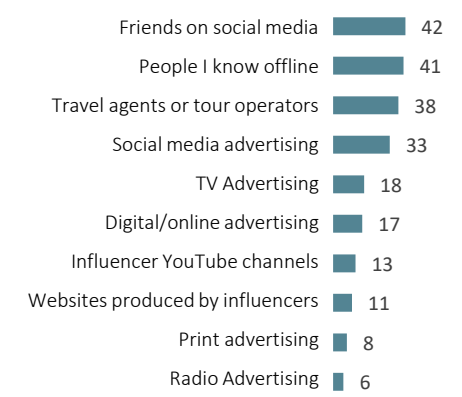
Q4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

Perceived seriousness of service disruption



5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

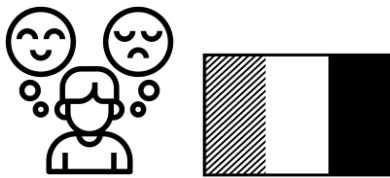
Channels of influence



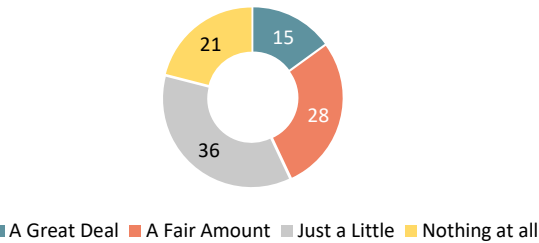
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.

FRENCH SHOW NOTABLY LOW IMPACT OF SERVICE CONCERNS IN RELATION TO CANADA AND PRIORITISE OVERALL VISITOR EXPERIENCE AND HEALTH AND SAFETY.

ATTITUDINAL PROFILE - FRANCE



Familiarity with prevalence of travel service issues



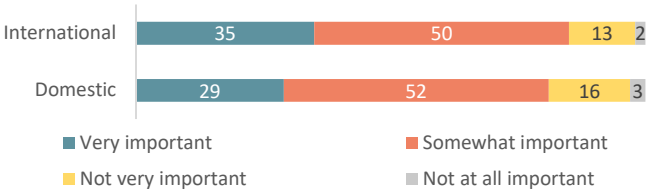
1. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Relative importance issues in destination selection



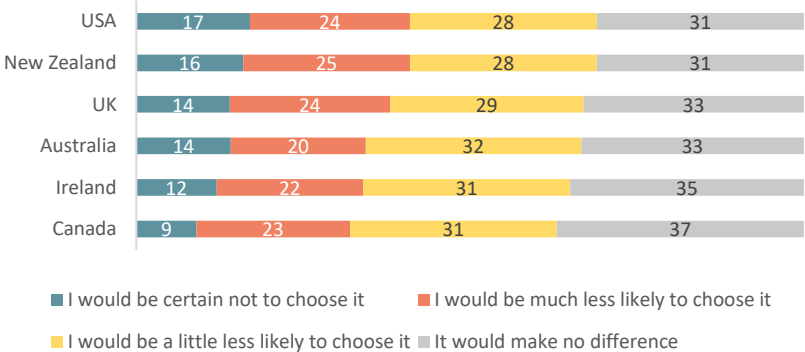
3A-E. And how important is the issue of high quality service delivered by trained staff in tourism businesses to you when you choose a destination compared to other factors? Please drag and drop the following issues, placing them in order of importance to you, where 1 is most important and 5 is least important.

Importance of quality service



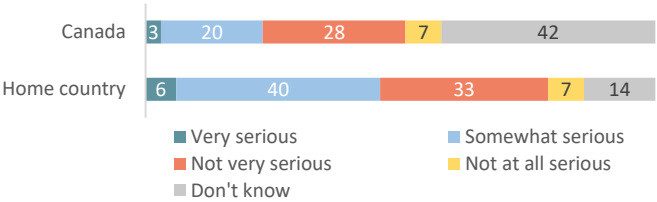
Q2A-B. How important would you say a destination’s ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



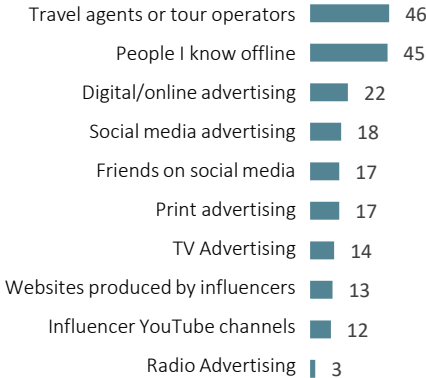
Q4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

Perceived seriousness of service disruption



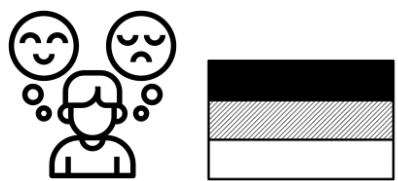
5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence



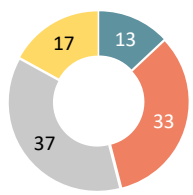
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.

GERMANS SHOW AMONG THE HIGHEST IMPACT OF SERVICE DISRUPTION ON DESTINATION SELECTION, THOUGH CANADA ENJOYS THE LOWEST RELATIVE IMPACT AMONG GERMANS.



ATTITUDINAL PROFILE - GERMANY

Familiarity with prevalence of travel service issues



■ A Great Deal ■ A Fair Amount ■ Just a Little ■ Nothing at all

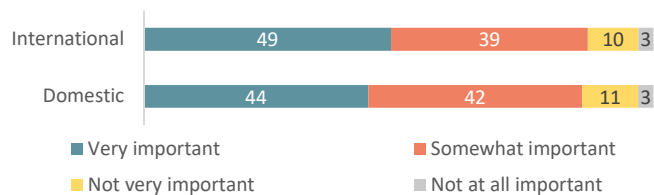
1. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Relative importance issues in destination selection



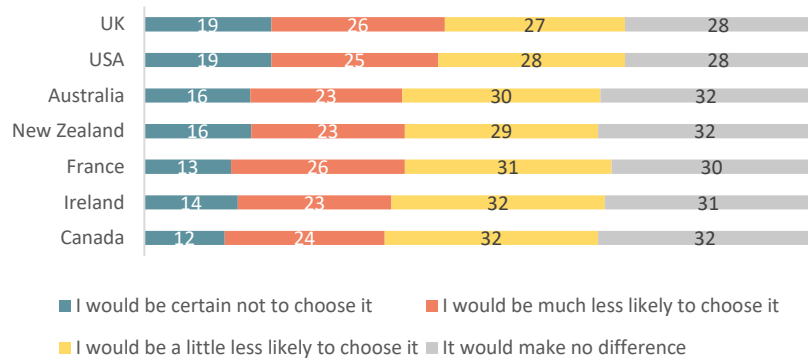
3A-E. And how important is the issue of high quality service delivered by trained staff in tourism businesses to you when you choose a destination compared to other factors? Please drag and drop the following issues, placing them in order of importance to you, where 1 is most important and 5 is least important.

Importance of quality service



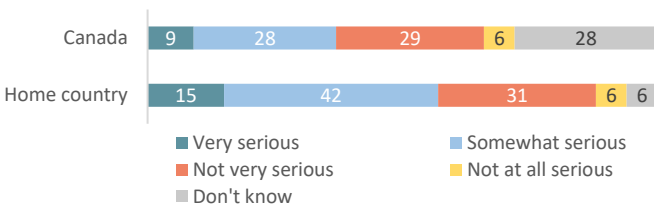
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



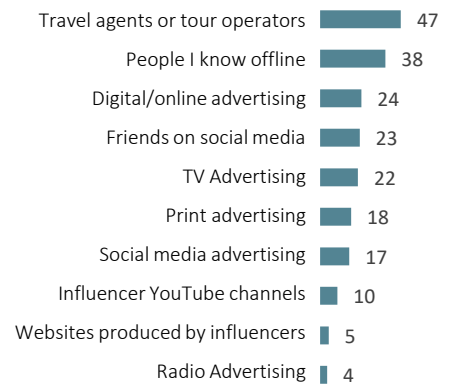
Q4A-G. Here is a list of popular tourism destinations around the world. If you learnt that each of these countries was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a holiday/vacation?

Perceived seriousness of service disruption

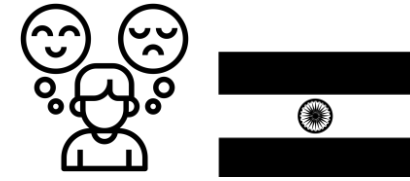


5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence



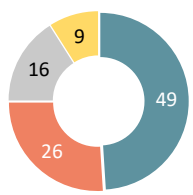
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.



INDIANS REPORT HIGH LEVELS OF FAMILIARITY WITH SERVICE DISRUPTION ISSUES AND THE HIGHEST IMPACT ON DECISIONS, THOUGH HEALTH AND SAFETY IS A MAJOR PRIORITY.

ATTITUDINAL PROFILE - INDIA

Familiarity with prevalence of travel service issues



■ A Great Deal ■ A Fair Amount ■ Just a Little ■ Nothing at all

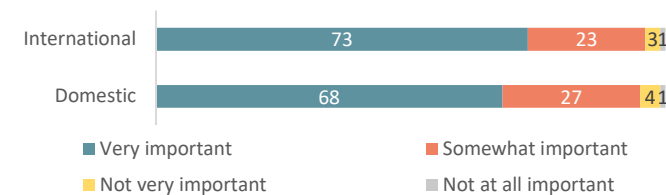
1. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Relative importance issues in destination selection



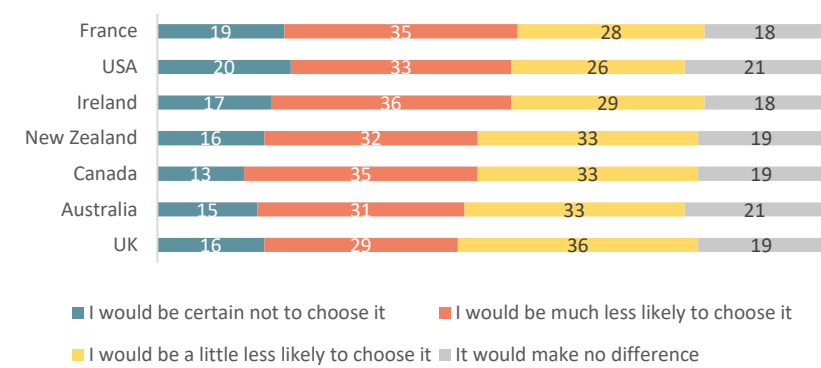
3A-E. And how important is the issue of high quality service delivered by trained staff in tourism businesses to you when you choose a destination compared to other factors? Please drag and drop the following issues, placing them in order of importance to you, where 1 is most important and 5 is least important.

Importance of quality service



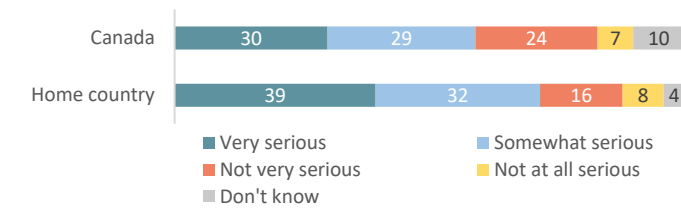
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



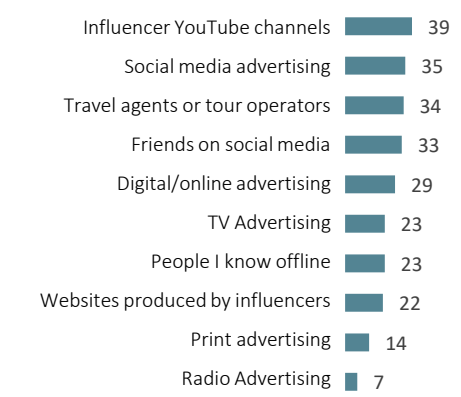
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Perceived seriousness of service disruption



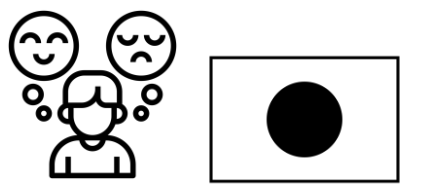
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Channels of influence



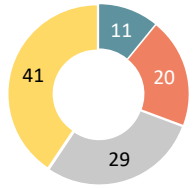
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.

JAPAN SHOWS THE LOWEST FAMILIARITY WITH SERVICE DISRUPTION ISSUES; HOWEVER, THIS IS CONSIDERED HIGHLY IMPACTFUL ON DESTINATION SELECTION IN GENERAL.



ATTITUDINAL PROFILE - JAPAN

Familiarity with prevalence of travel service issues



■ A Great Deal ■ A Fair Amount ■ Just a Little ■ Nothing at all

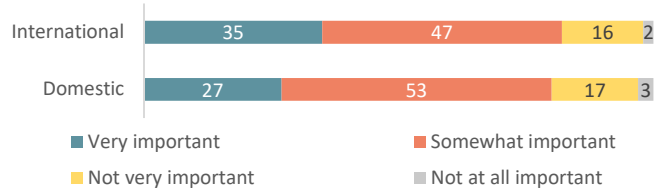
1. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Relative importance issues in destination selection



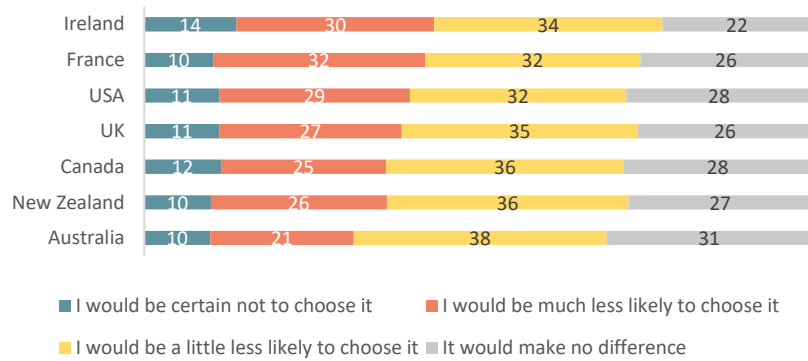
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Importance of quality service



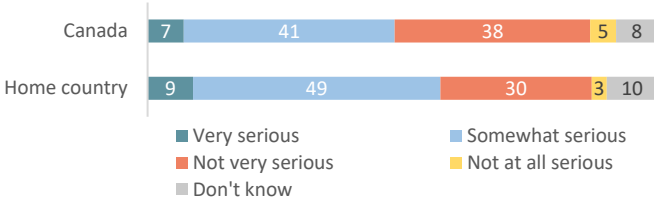
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



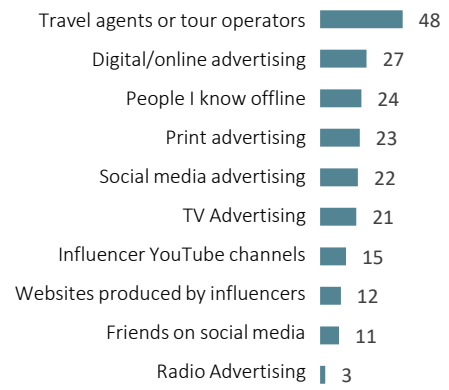
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Perceived seriousness of service disruption

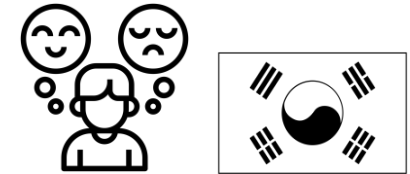


5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence



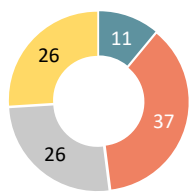
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.



KOREANS SHOW HIGH PRIORITIZATION OF QUALITY SERVICE WHEN SELECTING INTERNATIONAL DESTINATIONS, HOWEVER CANADA IS CONSIDERED LEAST IMPACTED.

ATTITUDINAL PROFILE – SOUTH KOREA

Familiarity with prevalence of travel service issues



■ A Great Deal ■ A Fair Amount ■ Just a Little ■ Nothing at all

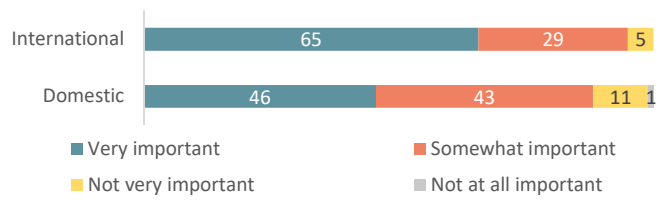
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Relative importance issues in destination selection



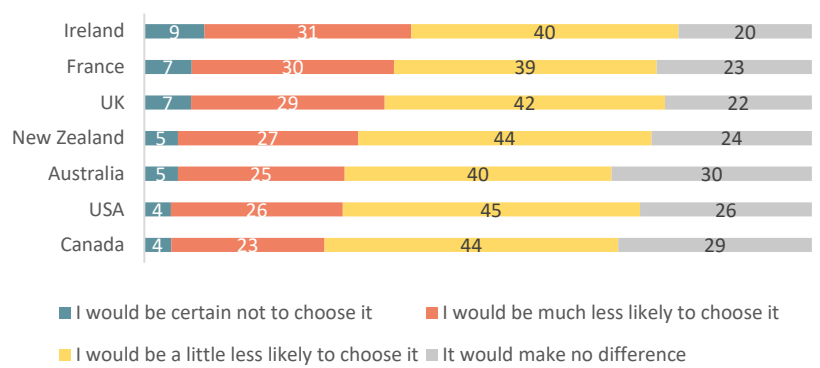
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Importance of quality service



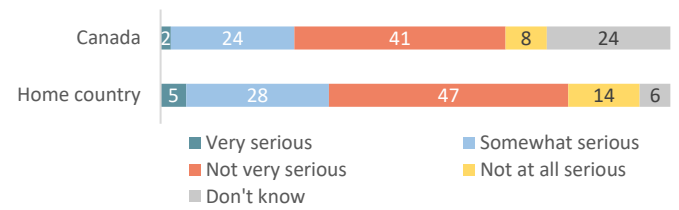
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



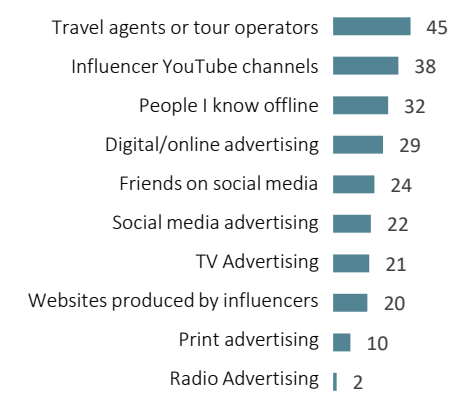
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Perceived seriousness of service disruption

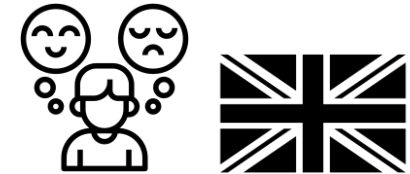


5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence



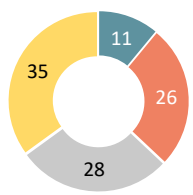
DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.



THE UK SHOWS HIGH CONCERN ABOUT HEALTH AND SAFETY AND AMONG THE LOWEST IMPACT OF PERCEIVED SERVICE DISRUPTION, PARTICULARLY IN THE CASE OF CANADA.

ATTITUDINAL PROFILE - UK

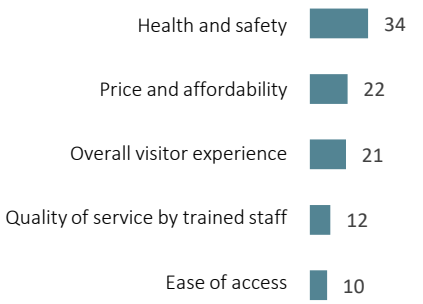
Familiarity with prevalence of travel service issues



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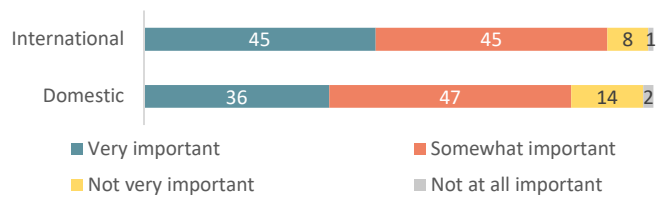
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Relative importance issues in destination selection



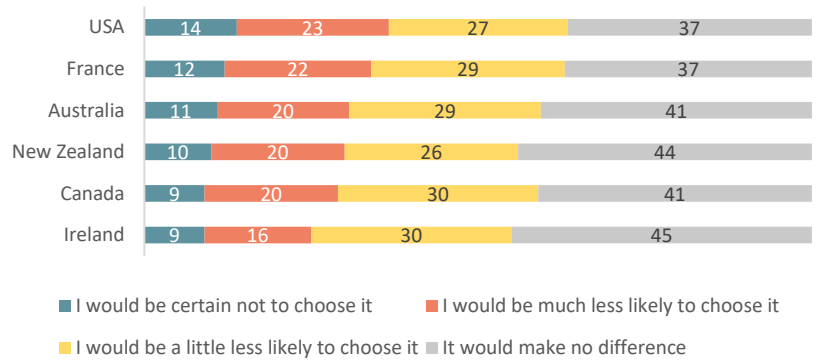
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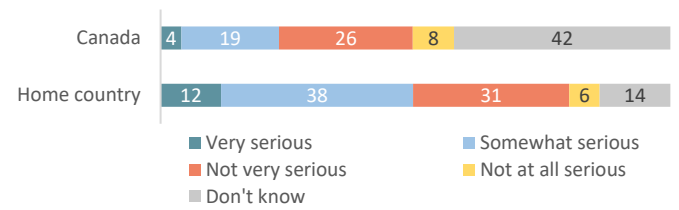
Q2A-B. How important would you say a destination's ability to deliver high quality service from trained staff in tourism businesses is to you ...?

Impact of service disruption on destination desirability



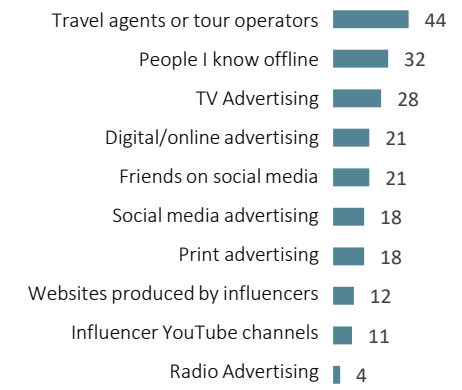
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Perceived seriousness of service disruption



5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence

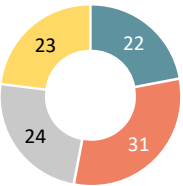


DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.

THE USA REPORTS HIGH FAMILIARITY WITH AND IMPACT OF SERVICE DISRUPTION ISSUES, HOWEVER CANADA SEES THE LOWEST PERCEIVED IMPACT IN DESTINATION SELECTION.

ATTITUDINAL PROFILE - USA

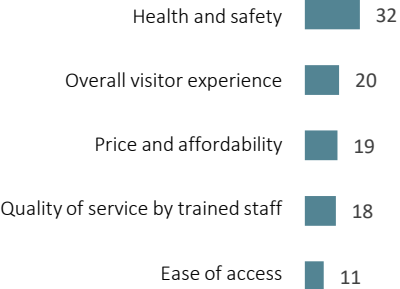
Familiarity with prevalence of travel service issues



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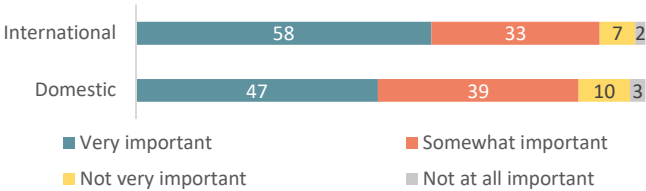
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Relative importance issues in destination selection



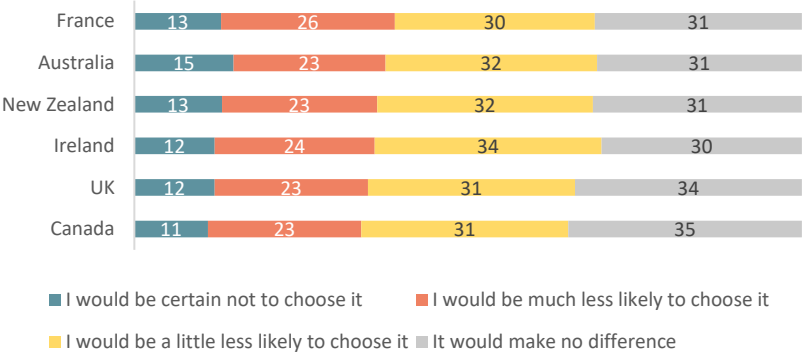
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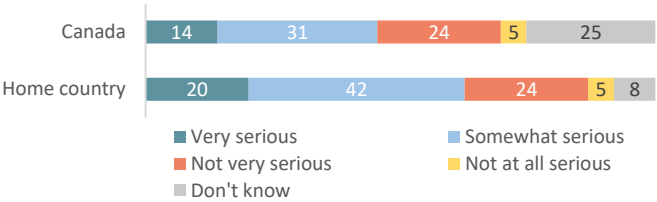
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Impact of service disruption on destination desirability



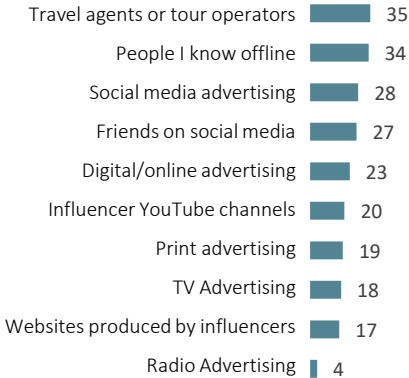
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Perceived seriousness of service disruption



5-6. From what you have seen, heard or read, how serious, if at all, would you say this problem is...?

Channels of influence



DM1. Here are several ways in which you might get information or see advertising about travel destinations. Which of the following do you pay most attention to when it comes to travel destinations? You may select up to three.



Twenty31 Consulting is a research and innovation-based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.

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