

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

SYNDICATED REPORT

CANADA MARKET OVERVIEW



DESTINATION
CANADA

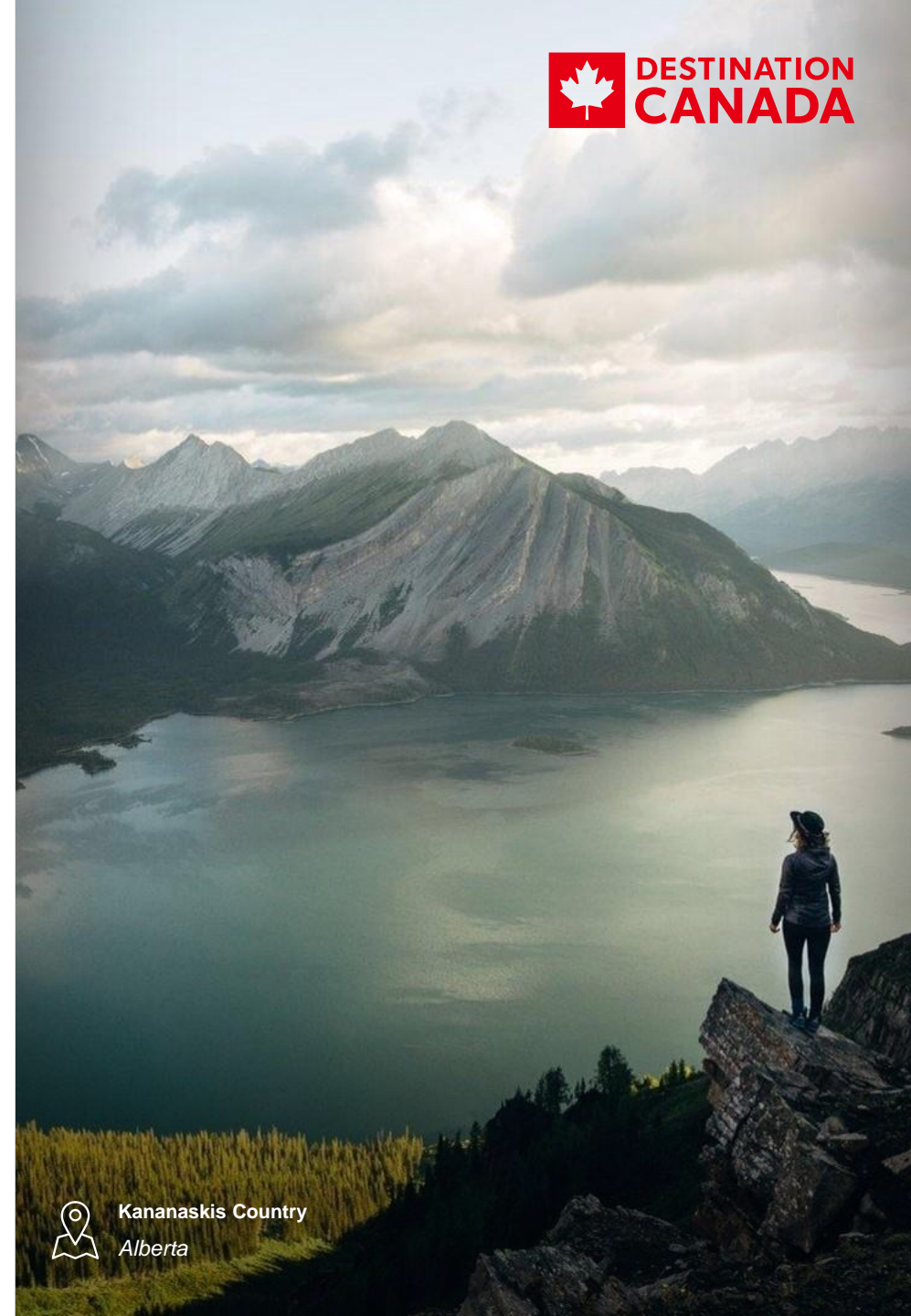


CANADIAN TOURISM DATA
collective

Canada Market Overview

An annual view of the Canadian market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.


Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).



Kananaskis Country
Alberta


YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.




Survey Start in Canada

October 23, 2020



Methodology Notes

Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.



2023 Base Sizes

Sample distribution: **National 18+**

Total Canada: **14,193**



YouGov[®] DestinationIndex

YouGov DestinationIndex is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy, and ultimately influence travellers' perception of Canada.




Survey Start in Canada

September 9, 2020

Canada added to tracking
July 6, 2023

Domestic destinations added to
tracking July 14, 2023



Methodology Notes

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.



Jul-Dec 2023 Base Sizes

Sample distribution: **National 18+**

Total Canada: **3,269 - 3,333**



Syndicated Product Overview



YouGov® Destination Index

16 key metrics

Engagement: Media & communication metrics

- Advertising Awareness**
Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
- Aided Awareness**
Which of the following destinations have you ever heard of? Please select all that apply.
- Attention**
Respondents hearing positive OR negative buzz about the destination.
- Buzz**
Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?
- Word of Mouth Exposure**
Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

5

Lower funnel metrics

- Purchase Intent**
Which of the proposed destinations are you most likely to visit?
- Consideration**
When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
- Recent Visitor (Current Customer)**
Which of the following destinations have you visited in the past 12 months?
- Former Visitor (Former Customer)**
Which of the following destinations have you ever visited?

Destination / Brand health metrics

- General Impression**
Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?
- Visitor Satisfaction**
Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?
- Quality**
Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?
- Value**
Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.
- Reputation**
Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?
- Recommendation**
Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?
- Index (Overall Destination Health)**
Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend



Economic factors may be limiting Canadians' ability to travel abroad

- While near level with the score of domestic vacations, incidence of planned international vacations has plateaued
- Incidence of planned domestic vacations increased in 2023, however, fewer trips are being planned than in years past
- 51% try to keep to a strict budget while travelling
- Price of travel and accommodation are increasingly being mentioned as obstacles preventing travel
- Value for money is the most mentioned destination choice influence



- **Highlighting the value and unique experiences available domestically, Canada can set itself apart from international competitors, catering to the budget-conscious preferences of Canadian travellers**



Friends and family play a large role in travel behaviour

- 24% mention proximity to friends and family and 20% follow recommendations as factors effecting destination choice
- Visits to friends and family are the most popular type of vacation
- 40% rely on information from friends and family when vacation planning
- Social media is considered the most effective advertising channel



- **Emphasizing family-friendly vacations and experiences that facilitate spending time with loved ones can resonate strongly with Canadians**
- **By fostering positive sentiment through user-generated content and partnerships, Canada can amplify the impact of recommendations from friends and family and encourage Canadians to explore their own country**



Domestic travel increased in 2023, but ended the year trending down

- Incidence of planned domestic vacations increased in 2023 Q2, reaching its highest score since tracking began; but scores fell in Q4
- Sentiment towards domestic travel is positive as Canada ranks first across all key performance metrics when compared to international competitors
- The provinces and territories form three tiers in key performance metric results, with Ontario, British Columbia and Québec forming the top tier
- Canada, along with the provinces of Québec and Alberta, experienced significant quarter-over-quarter decreases to close 2023 in multiple key performance metrics




- **Adapting strategies to address fluctuating trends in domestic travel can help sustain interest and engagement among Canadian travellers**



Canada Market Overview



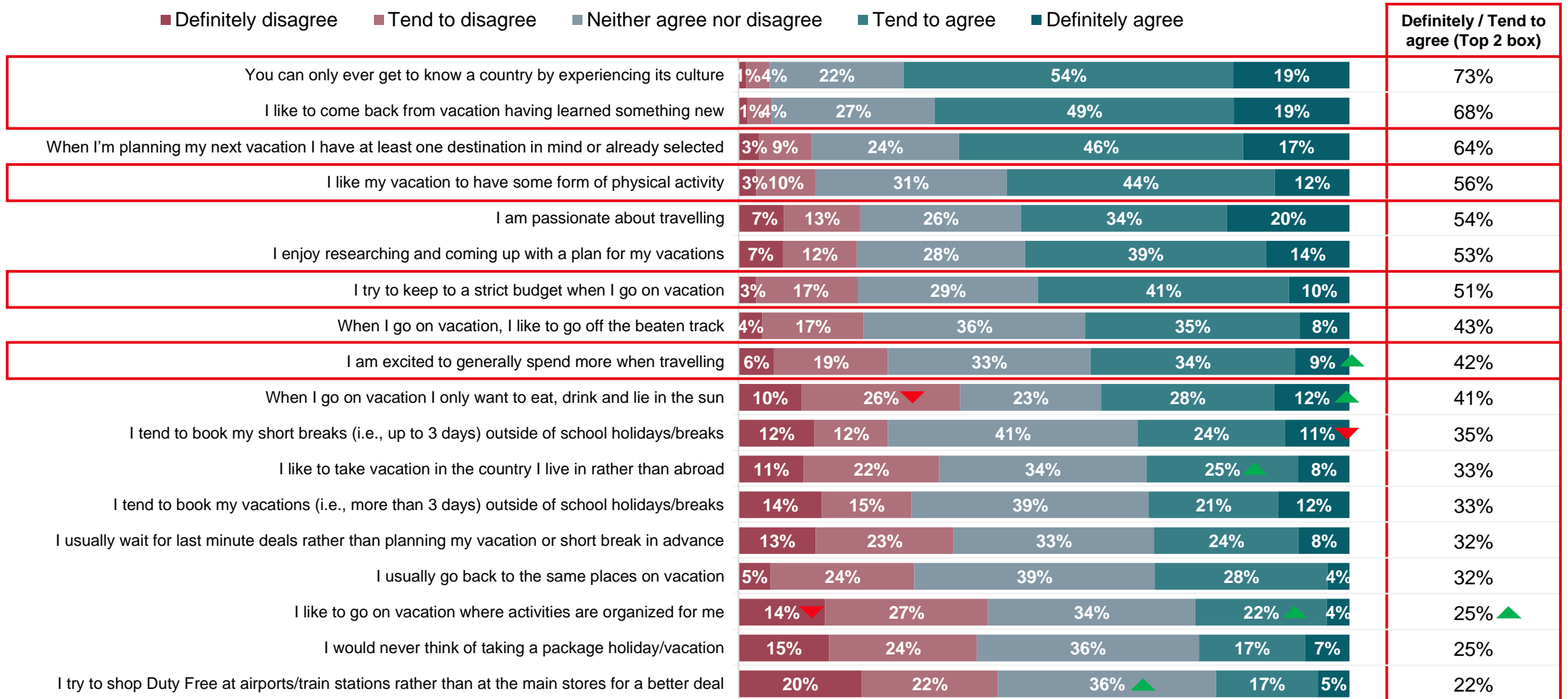
 Peggy's Cove
Nova Scotia



Attitudes Towards Travel



Most Canadians prioritize cultural and learning experiences in their travels, and often enjoying physical activities. While many are budget-conscious, an increasing number are enthusiastic about spending more during their travels

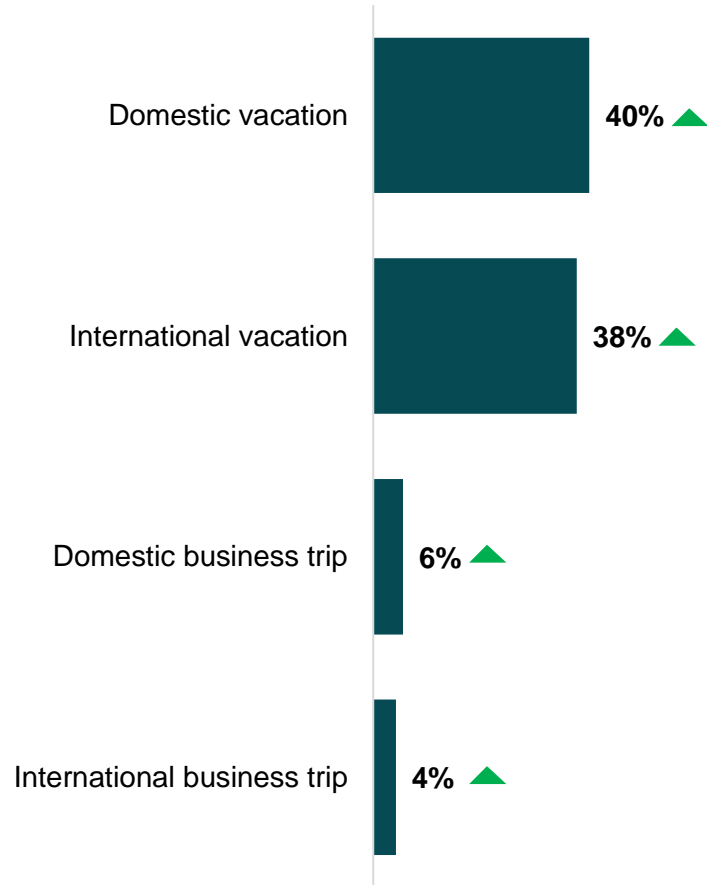


Trip Types Planned in Next 12 Months

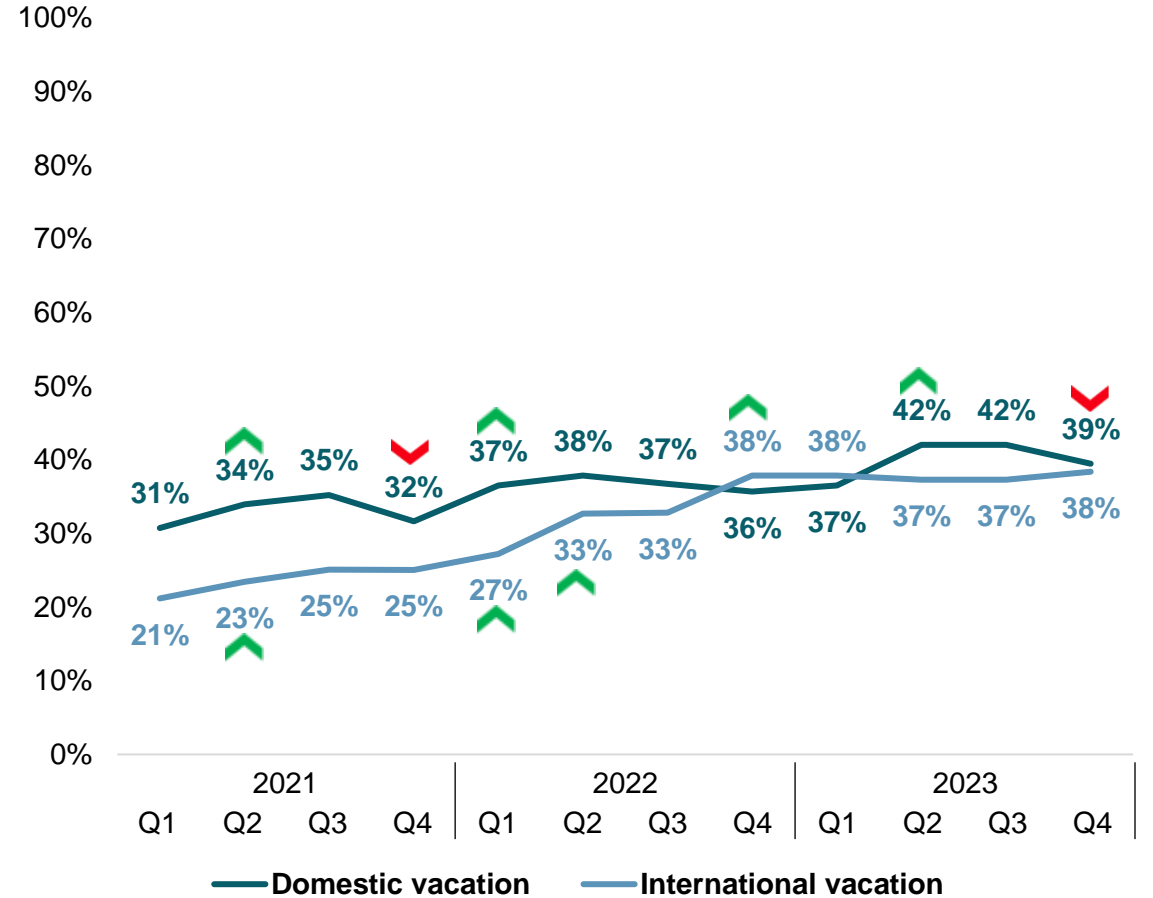


Incidence of planned travel increased year-over-year for all types of travel in 2023. With exceptional growth over 2022, planned international vacations has plateaued since 2022 Q4. Meanwhile, planned domestic vacations spiked in 2023, reaching its highest score since tracking began

Trip Types Planned in Next 12 Months



Vacation Trips Planned in Next 12 Months (Trended)



9 2023 Base: Canadians 18+ (n=14,193)
 2021-2023 Quarterly Trending Base Range: Canadians 18+ (n=3,459-3,668)
 Q: Which, if any, of the following trips are you planning to take in the next 12 months?
 Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

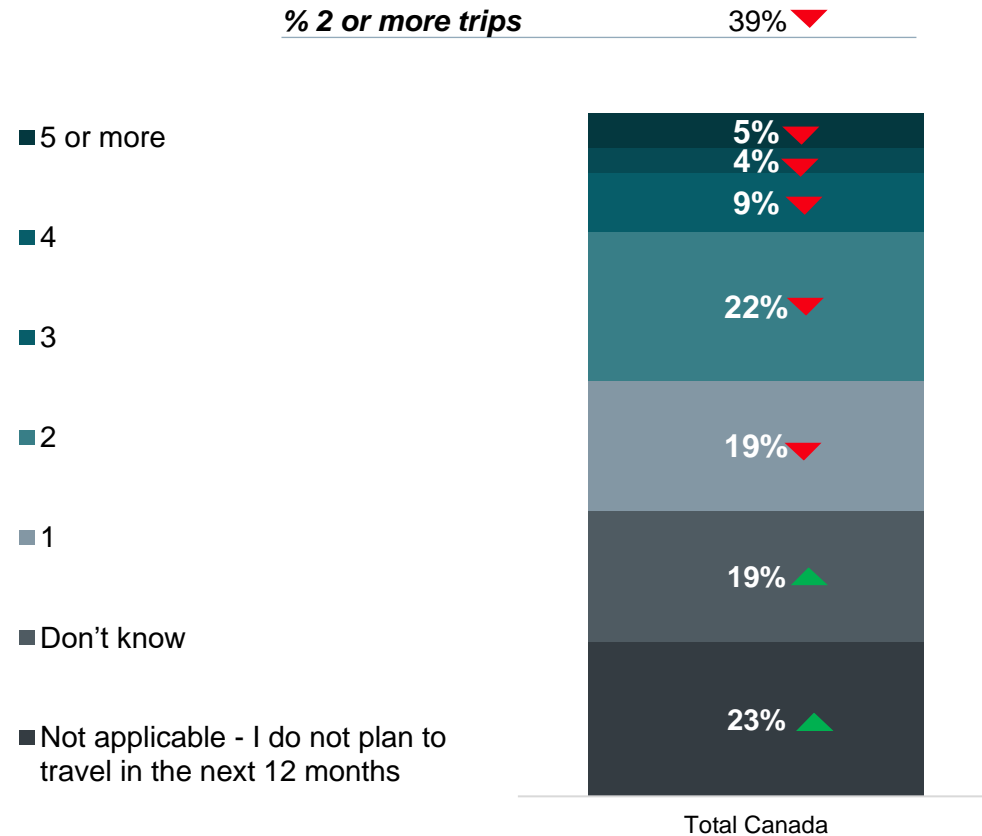


Number of Trips Planned in Next 12 Months

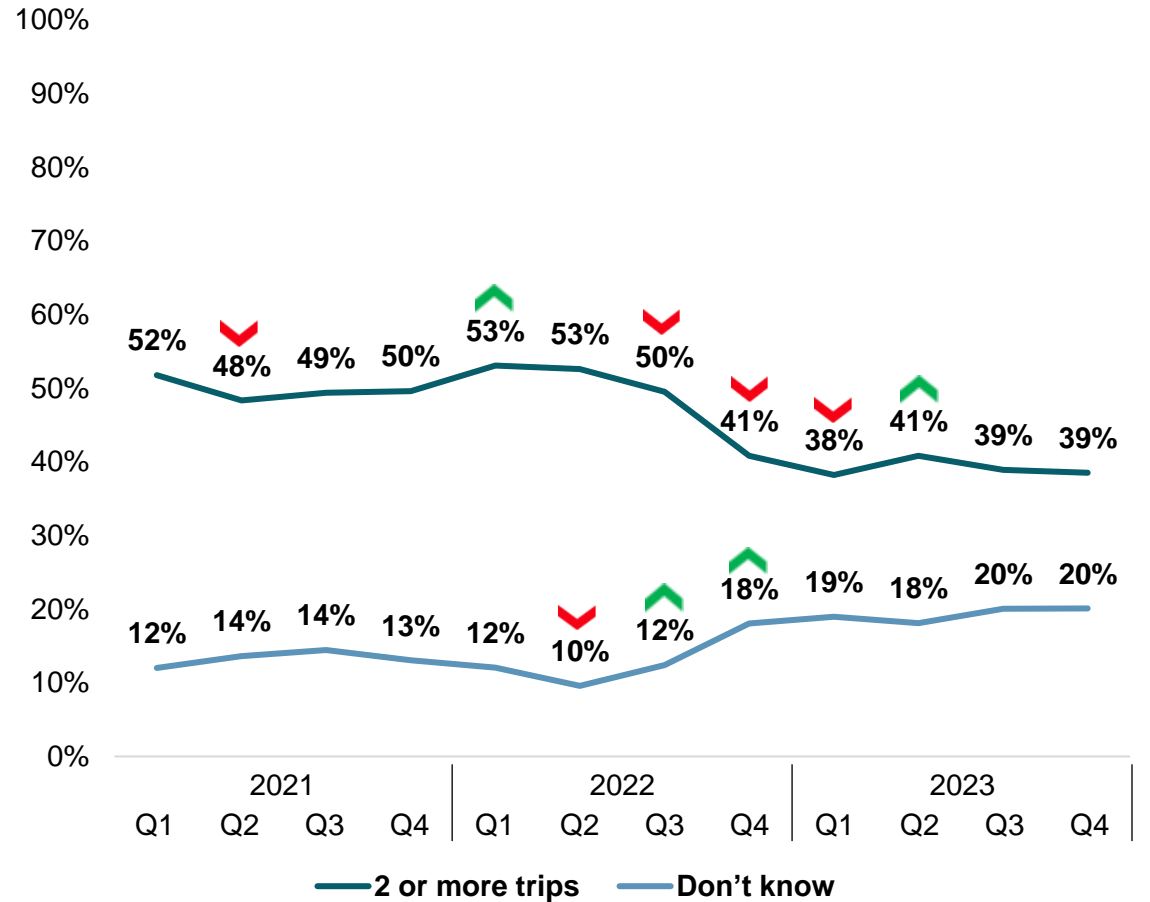


Despite increased incidence of planned domestic vacations, Canadians are planning fewer trips than in years past as travel uncertainty grows

Number of Trips Planned



Number of Trips Planned (Trended)

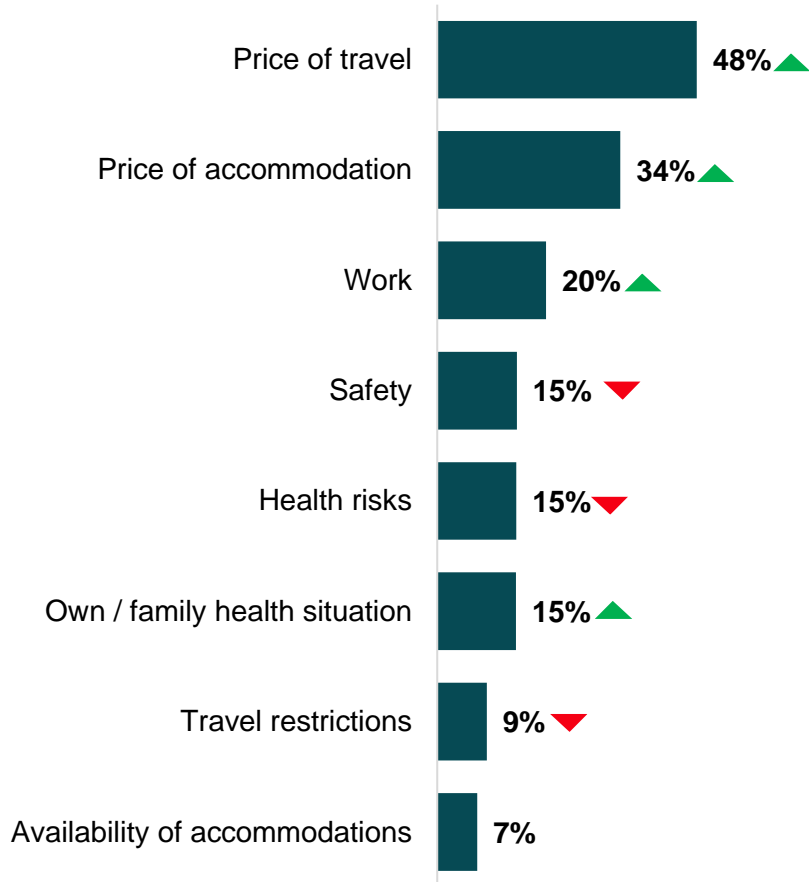


Factors Preventing Travel

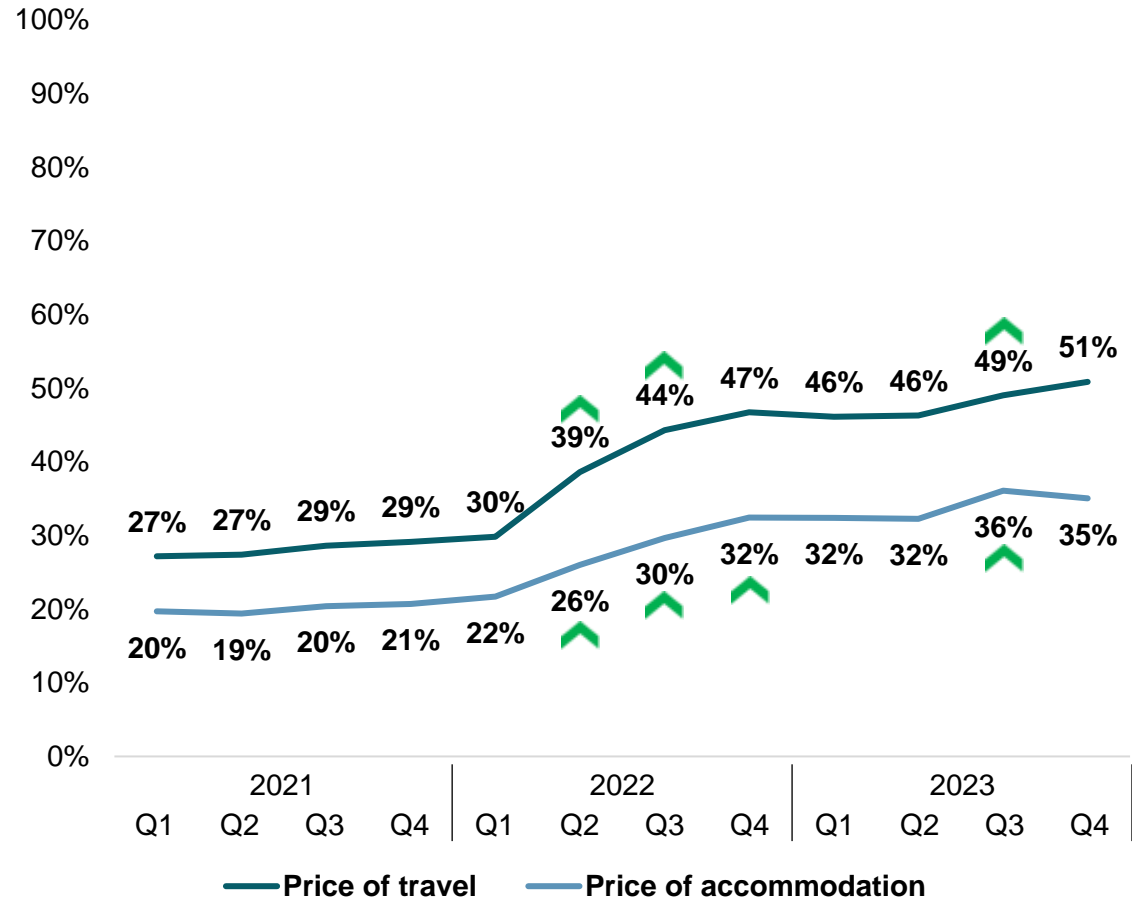


Price of travel and accommodation are increasingly being mentioned by Canadians as factors preventing them from travelling. Mentions of work being an obstacle have also increased, aligning with a decrease in those definitely agreeing that they book short breaks outside of school holidays

Factors Preventing Travel



Select Factors Preventing Travel (Trended)

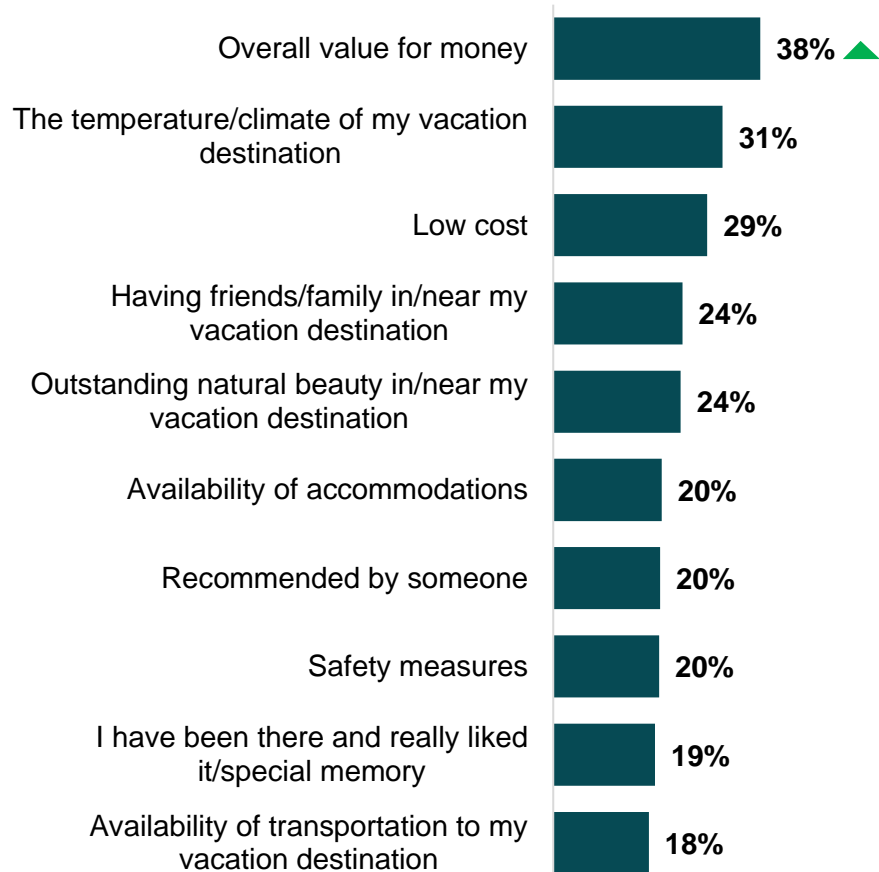


Destination Choice Influences

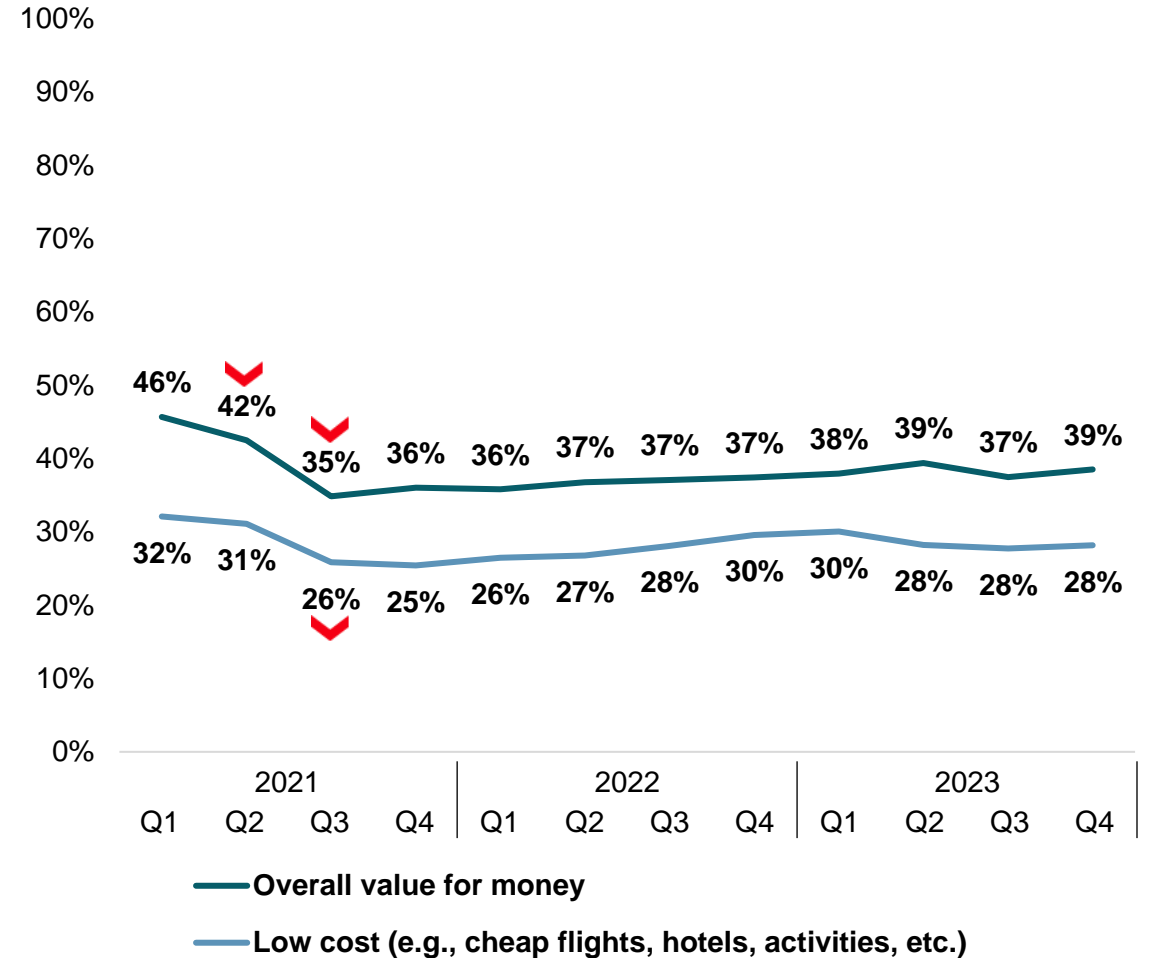


Value for money and low cost remain key factors for destination choice among Canadians in 2023, along with considerations such as climate, proximity to friends and family, and nature; one in five Canadians are influenced by recommendations

Destination Choice Influences (Top Responses)



Select Destination Choice Influences (Trended)



12 2023 Base: Canadians 18+ (n=14,193)
 2021-2023 Quarterly Trending Base Range: Canadians 18+ (n=2,832-3,668)
 Q: Thinking of your most recent vacation, which, if any, of the following influenced your choice of destination? Please choose all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)



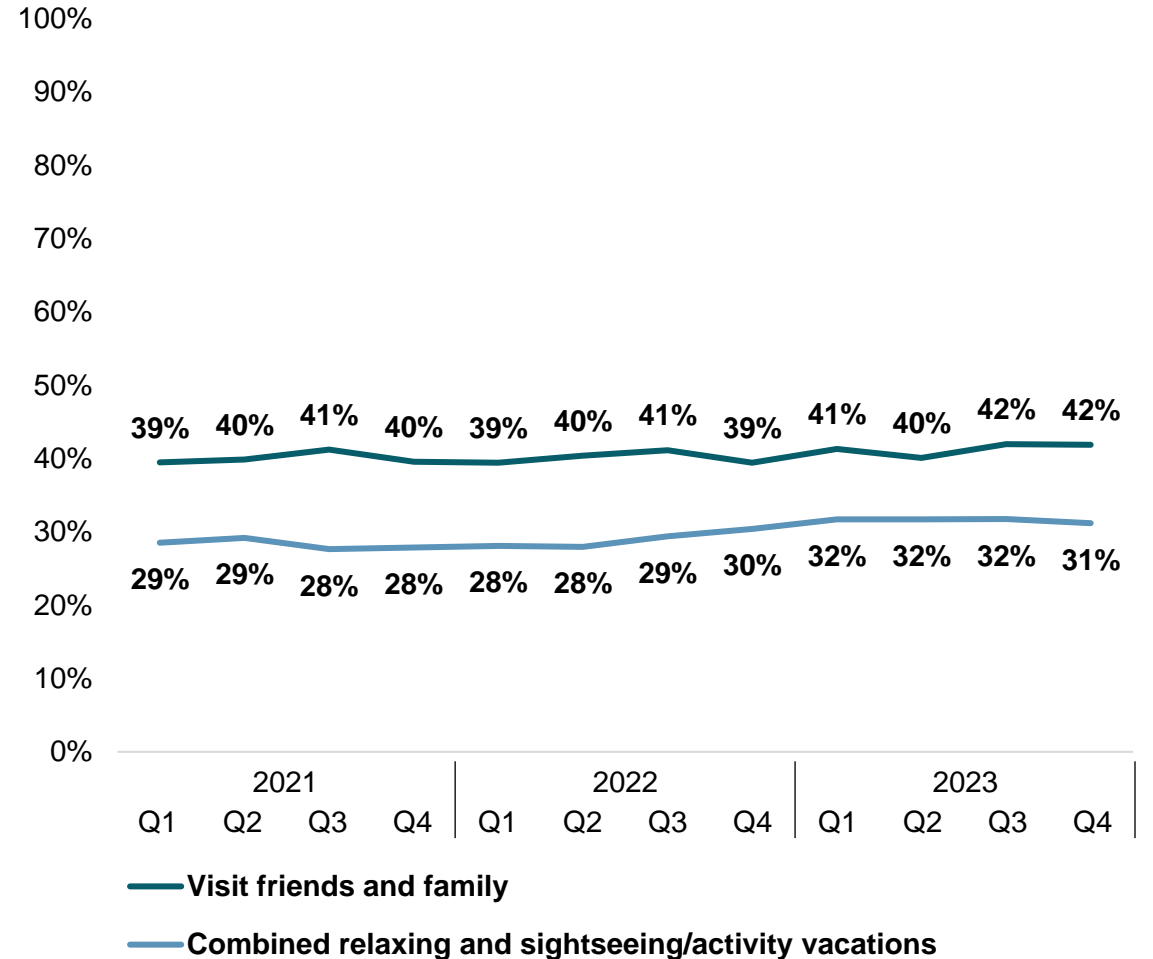
Favourite Types of Vacations

Visits to friends and family are the most common type of vacation taken by Canadians, followed by beach vacations and combined relax-and-sightsee vacations

Favourite Types of Vacations (Top Responses)



Select Favourite Types of Vacations (Trended)



2023 Base: Canadians 18+ (n=14,193)
 2021-2023 Quarterly Trending Base Range: Canadians 18+ (n=259-3,668)
 Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.



Vacation Planning Methods

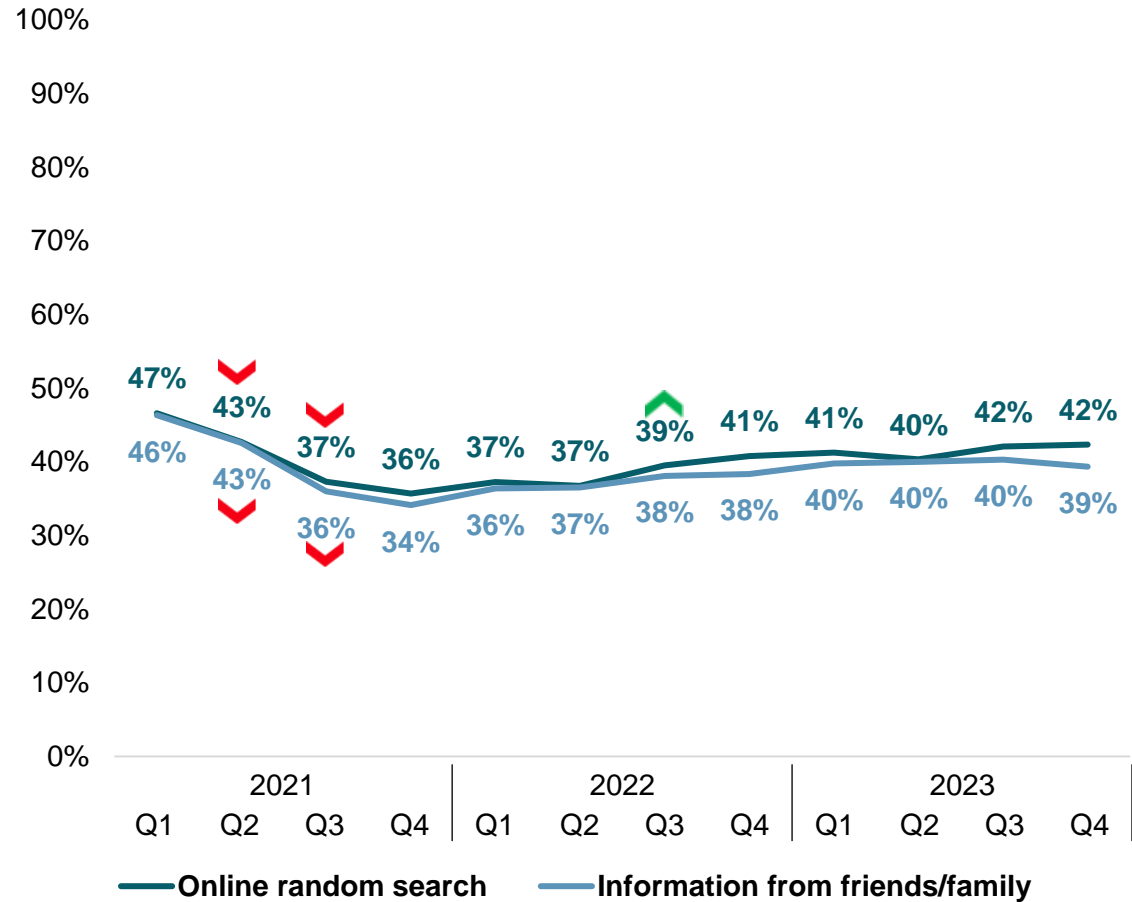


Canadians overwhelmingly prefer online search and advice from friends and family for vacation planning, scoring twice as high as the next closest resource

Vacation Planning Methods



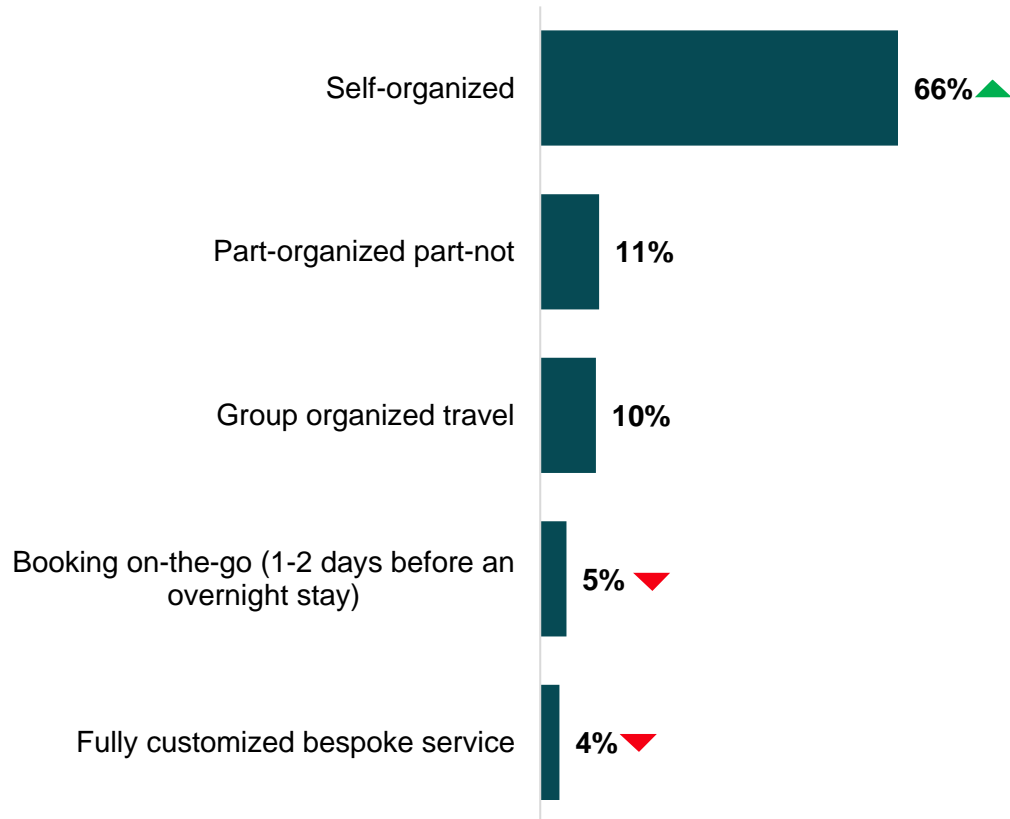
Select Vacation Planning Methods (Trended)



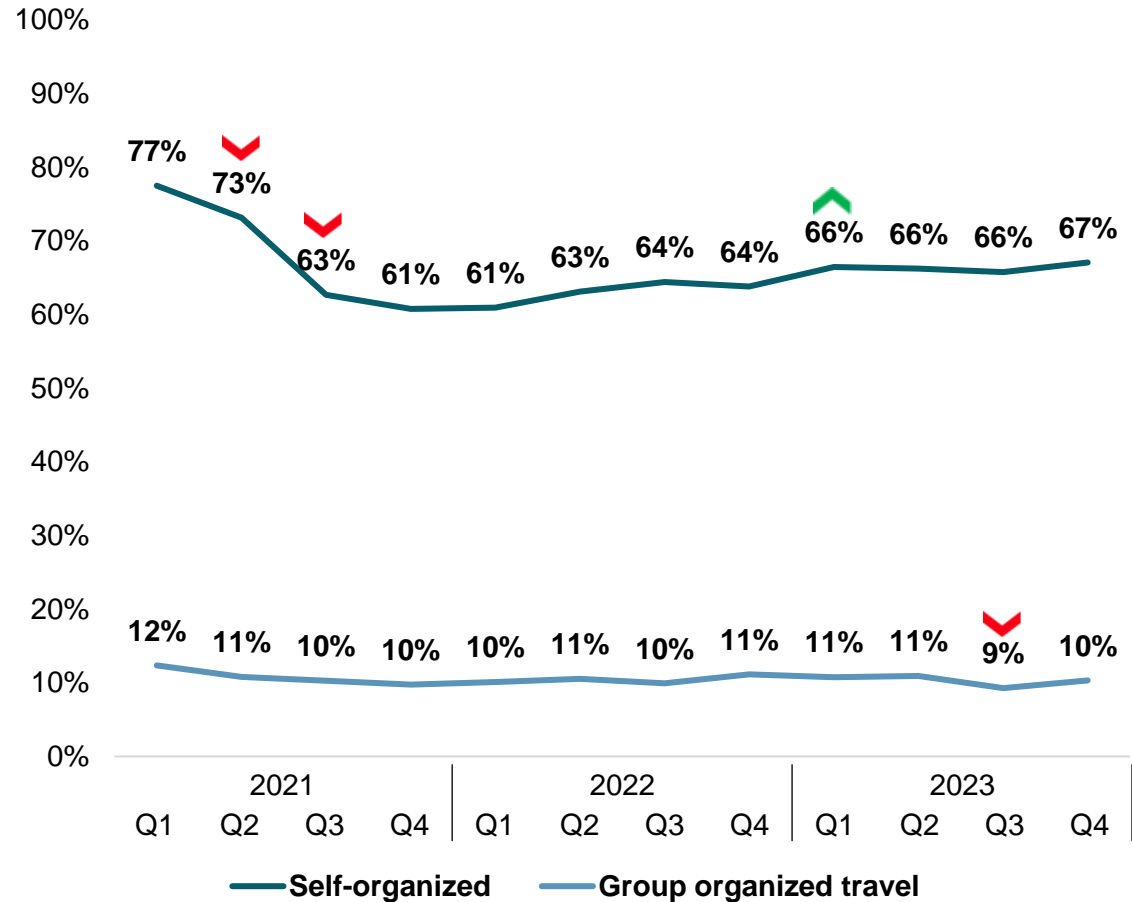
Vacation Organization Habits

Self-organization of vacations is preferred by the majority of Canadians

Vacation Organization Habits



Select Vacation Organization Habits (Trended)

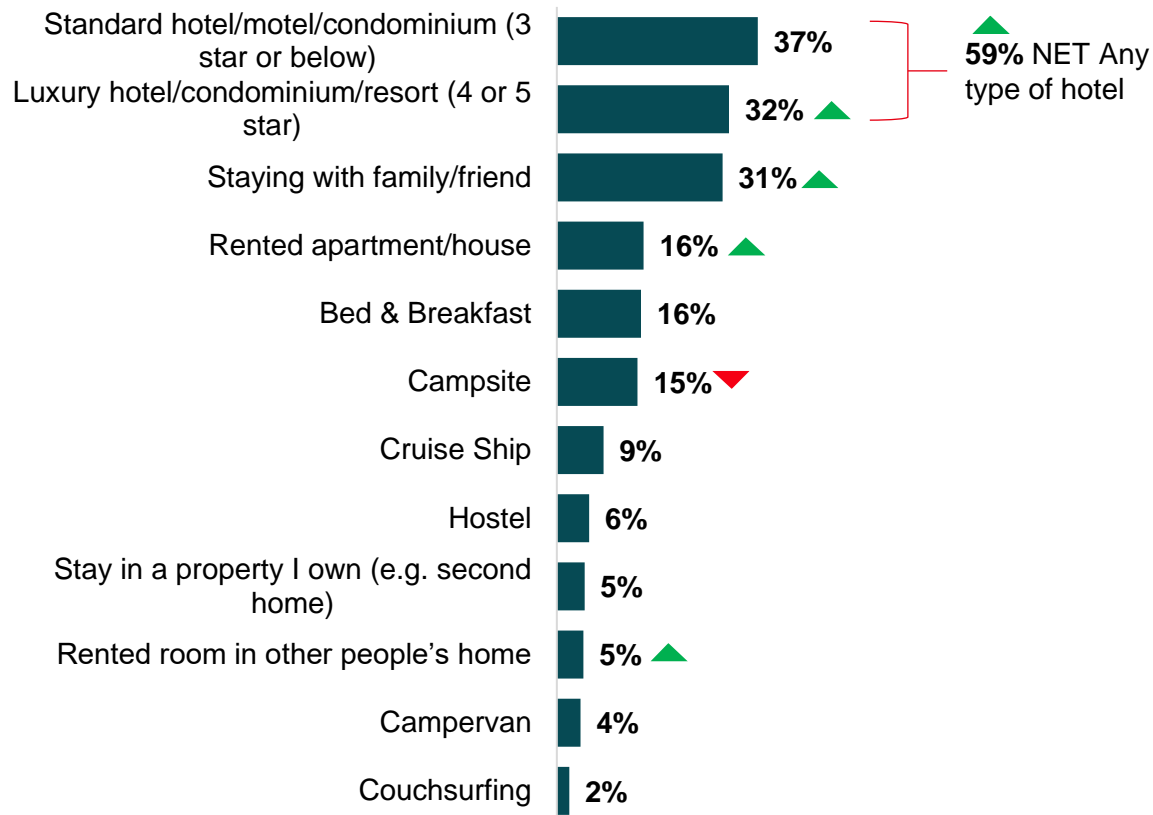


Accommodation Type Typically Stayed At

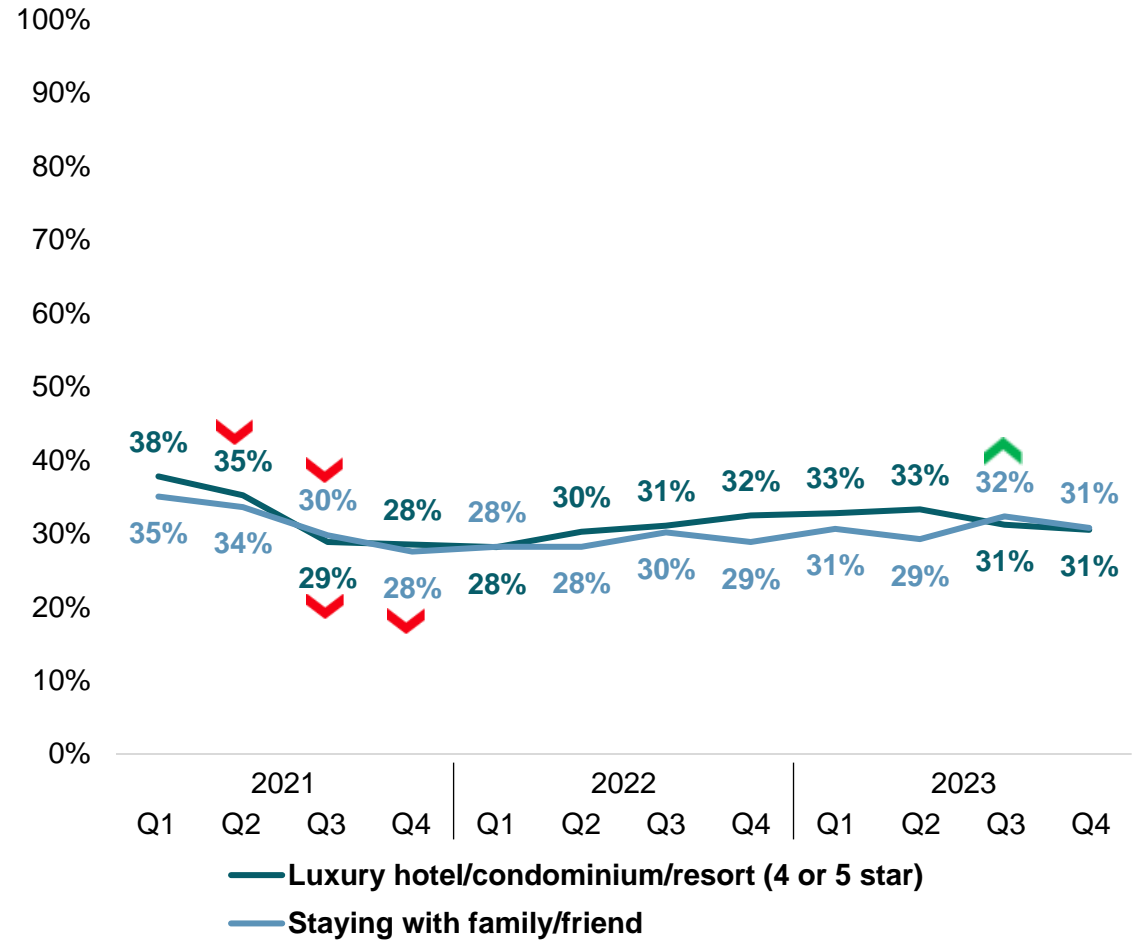


Hotels are the preferred accommodation type of Canadians, with three in five typically staying at a hotel. A reflection of Canadians' preference towards vacations to visit friends and family, almost one third stay with friends and family when vacationing

Accommodation Type Typically Stayed At



Select Accommodation Types (Trended)

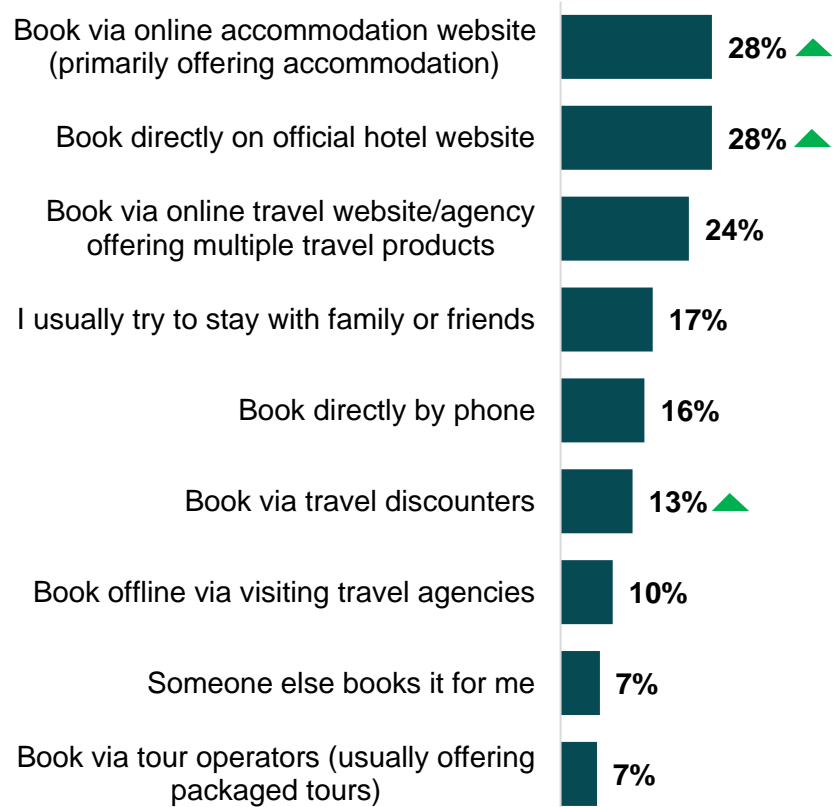


Accommodation Booking Methods

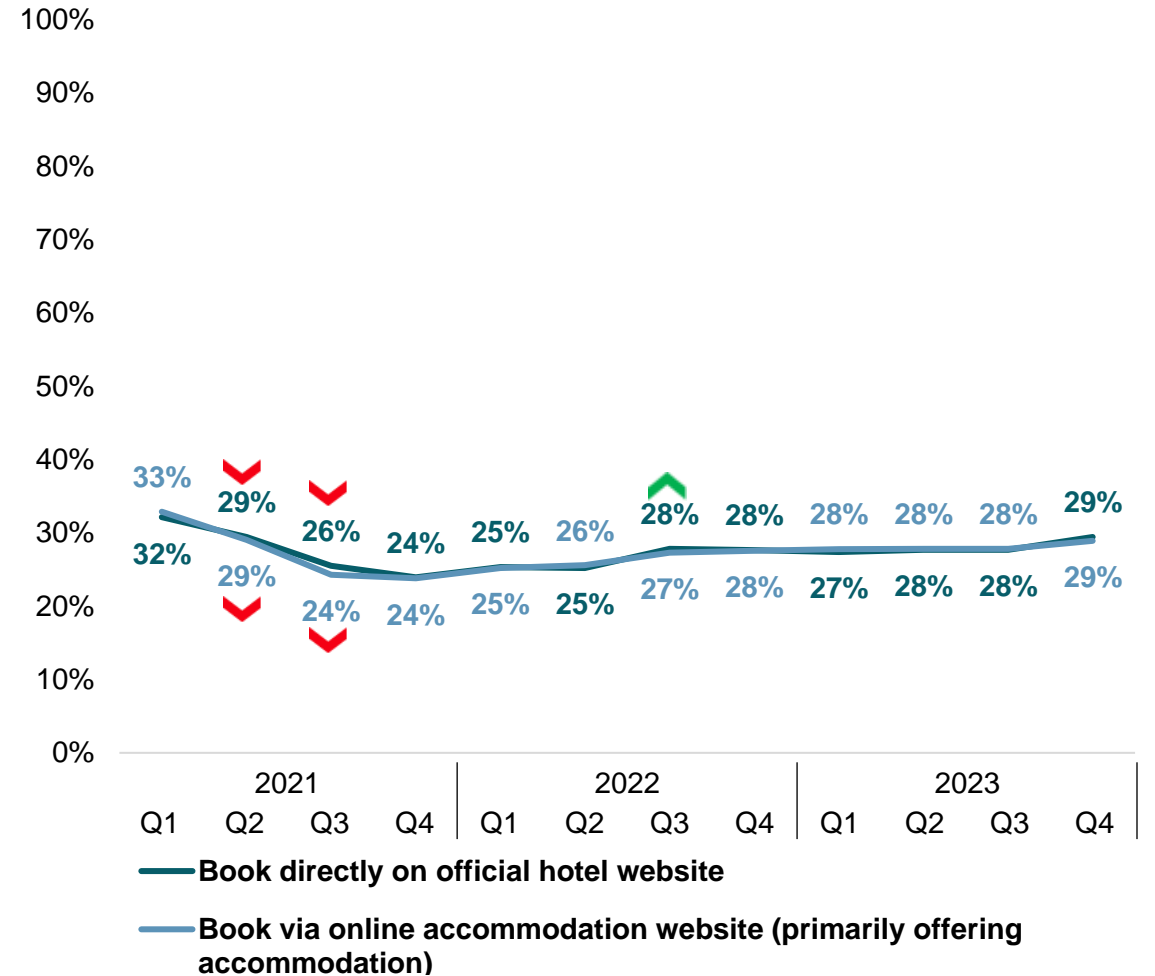


Use of online accommodation websites and official hotel websites for accommodation booking has increased year-over-year

Accommodation Booking Methods



Select Accommodation Booking Methods (Trended)

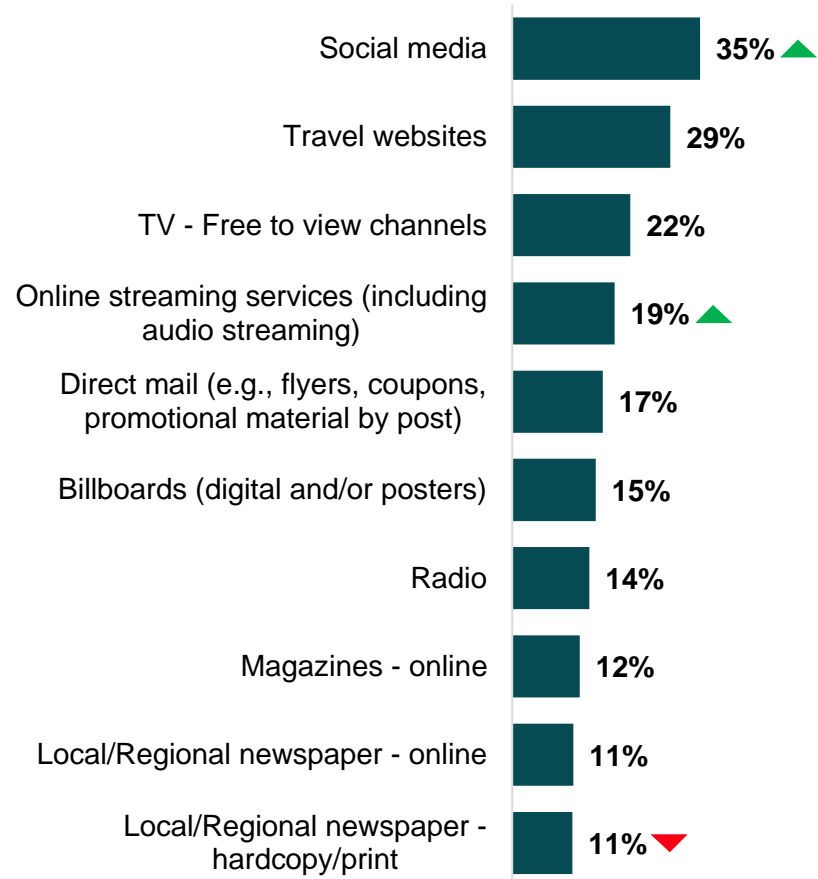


Effective Types of Travel Advertising

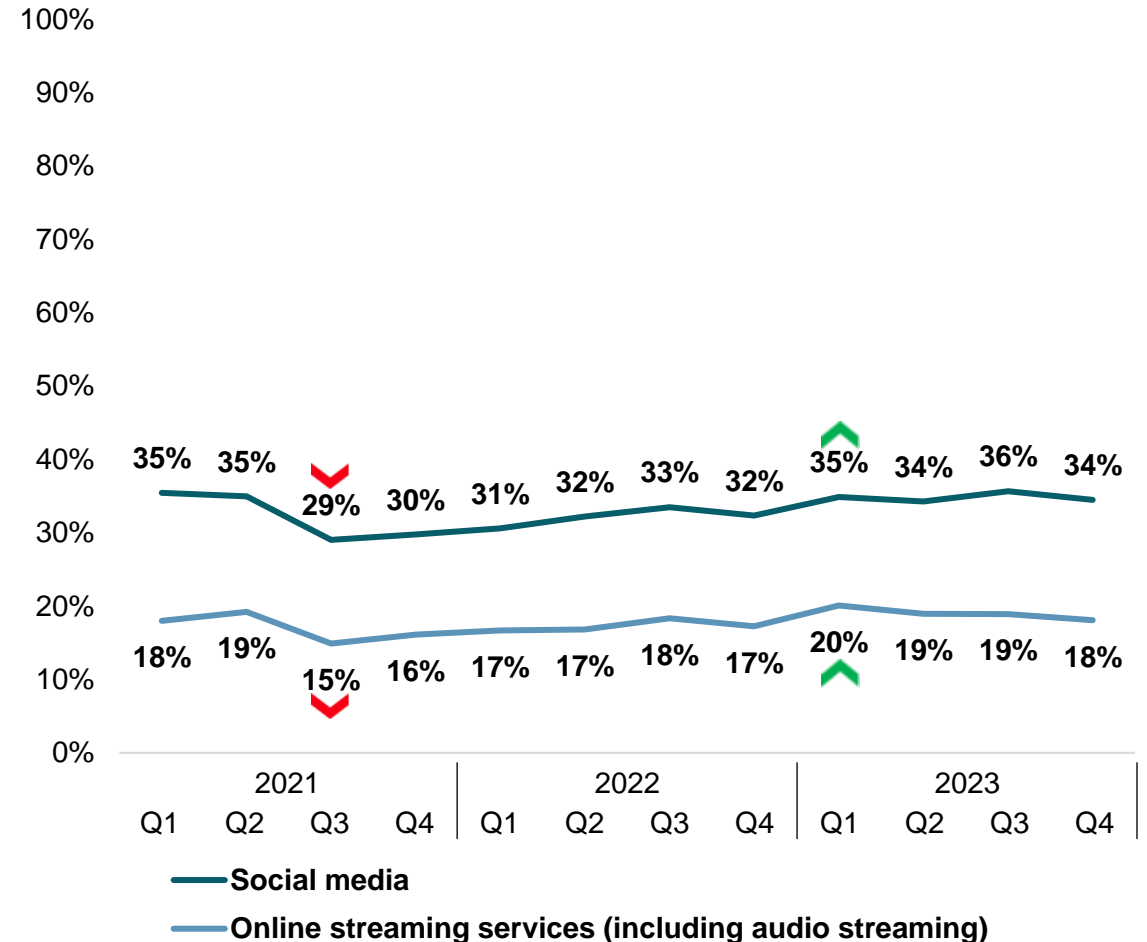


Social media and online streaming services are increasingly being mentioned as effective advertising channels, with social media being considered the most effective for reaching Canadian travellers

Effective Types of Travel Advertising (Top Responses)



Select Types of Travel Advertising (Trended)



2023 Base: Canadians 18+ (n=14,193)
 2021-2023 Quarterly Trending Base Range: Canadians 18+ (n=2,832-3,668)
 Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.





Performance of Canada in 2023 vs. Competitors



Yellowknife
Northwest Territories



Performance Scorecard for Canada

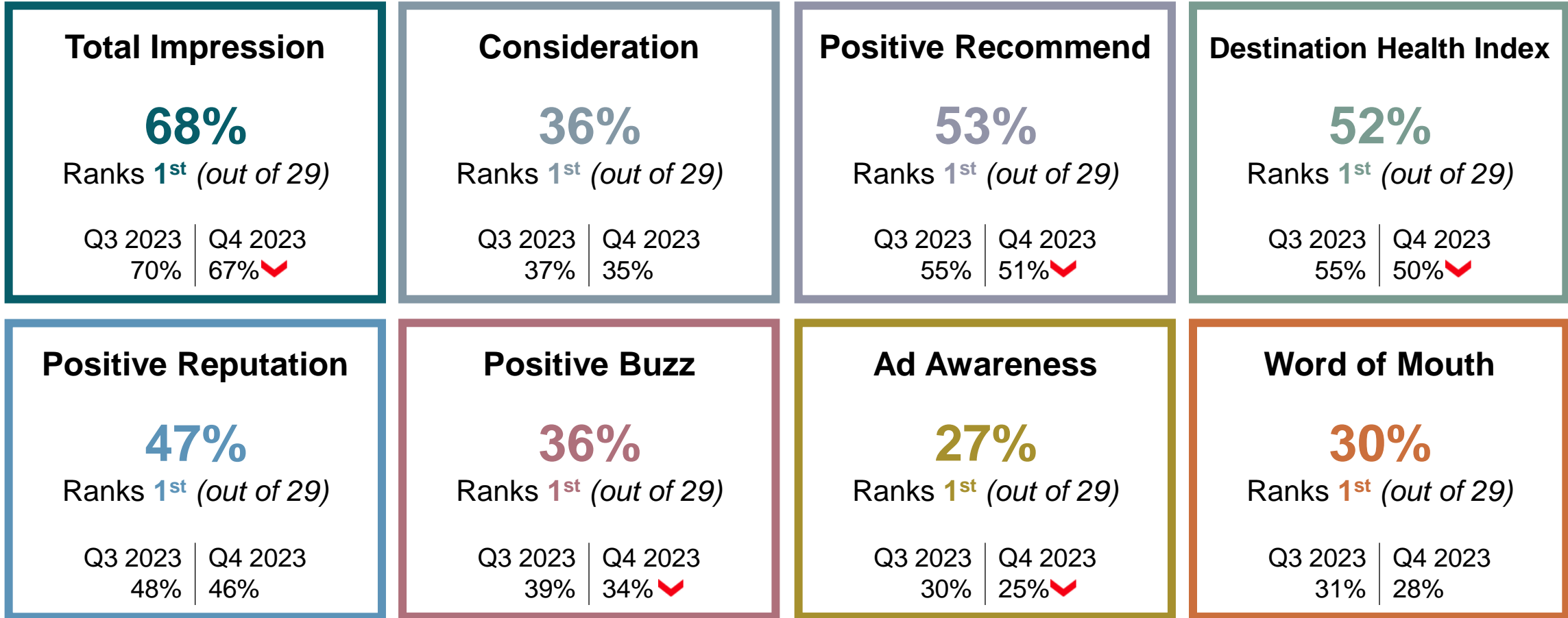
Metric		Definition		Question Text
Total Impression	→	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	→	Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?
Consideration	→	The number of consumers who would consider the destination when they are next in market to plan a vacation.	→	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
Positive Recommend	→	How likely consumers are to recommend a destination to a friend or colleague.	→	Which of the following destinations would you RECOMMEND to a friend or colleague?
Destination Health Index	→	Overall measure of a destination's brand health across several key destination health metrics.	→	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
Positive Reputation	→	How much consumers like and respect a destination.	→	Which of the following destinations do you regard as having a GOOD reputation for vacations?
Positive Buzz	→	How much positive news coverage consumers are hearing about a destination.	→	Over the PAST TWO WEEKS , which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?
Ad Awareness	→	How much advertising consumers have seen for a destination.	→	Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS ?
Word of Mouth	→	How much consumers are talking about a destination.	→	Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?



Performance Scorecard for Canada (Jul-Dec 2023)



When compared to all other countries tracked, Canada ranks as the top destination (out of 29 destinations) in all eight key performance metrics in the second half of 2023. This speaks to Canadians' positive sentiment towards domestic travel.



July - December 2023 Scores for Canada



The US and Italy are the top performing countries after Canada, each ranking second (out of 29 destinations) in four of eight key performance metrics in the second half of 2023.

Rank	Total Impression	Consideration	Positive Recommend	Destination Health Index
#1	Canada (68%)	Canada (36%)	Canada (53%)	Canada (52%)
#2	USA (50%)	USA (29%)	Italy (30%)	Italy (29%)
#3	Italy (42%)	Italy (21%)	USA (27%)	USA (28%)
#4	Australia (39%)	Mexico (19%)	Spain (23%)	Spain (24%)
#5	France (39%)	Greece (18%)	France (23%)	France (24%)

Rank	Positive Reputation	Positive Buzz	Ad Awareness	Word of Mouth
#1	Canada (47%)	Canada (36%)	Canada (27%)	Canada (30%)
#2	Italy (42%)	Italy (16%)	USA (20%)	USA (25%)
#3	The Bahamas (39%)	USA (14%)	Mexico (12%)	Mexico (16%)
#4	Greece (35%)	Australia (14%)	Italy (8%)	Italy (13%)
#5	Spain (35%)	Japan (14%)	France (7%)	UK (11%)





Performance of Provinces & Territories in 2023



Churchill
Manitoba



Provincial and Territorial July-December 2023 Scores (1 of 2)



Among the provinces and territories, Ontario, British Columbia and Québec rank in the top three for all metrics and comprise the top tier. Scores for Nova Scotia, Alberta and Prince Edward Island are near level with each other and form the top of a second tier.

	Ontario	British Columbia	Québec	Nova Scotia	Alberta	Prince Edward Island
Total Impression	45%	43%	44%	34%	35%	34%
Consideration	22%	21%	19%	14%	14%	13%
Positive Recommend	29%	31%	29%	23%	21%	21%
Destination Health Index	31%	30%	29%	23%	22%	22%
Positive Reputation	26%	32%	26%	24%	18%	25%
Positive Buzz	19%	18%	18%	11%	15%	11%
Ad Awareness	15%	12%	15%	7%	9%	7%
Word of Mouth	17%	14%	15%	9%	11%	7%



Provincial and Territorial July-December 2023 Scores (2 of 2)



Newfoundland & Labrador and New Brunswick rank seventh or eighth in most metrics and are apart of the second tier of provinces and territories. Saskatchewan, Manitoba and the territories trail the other provinces by a considerable margin and form a third tier

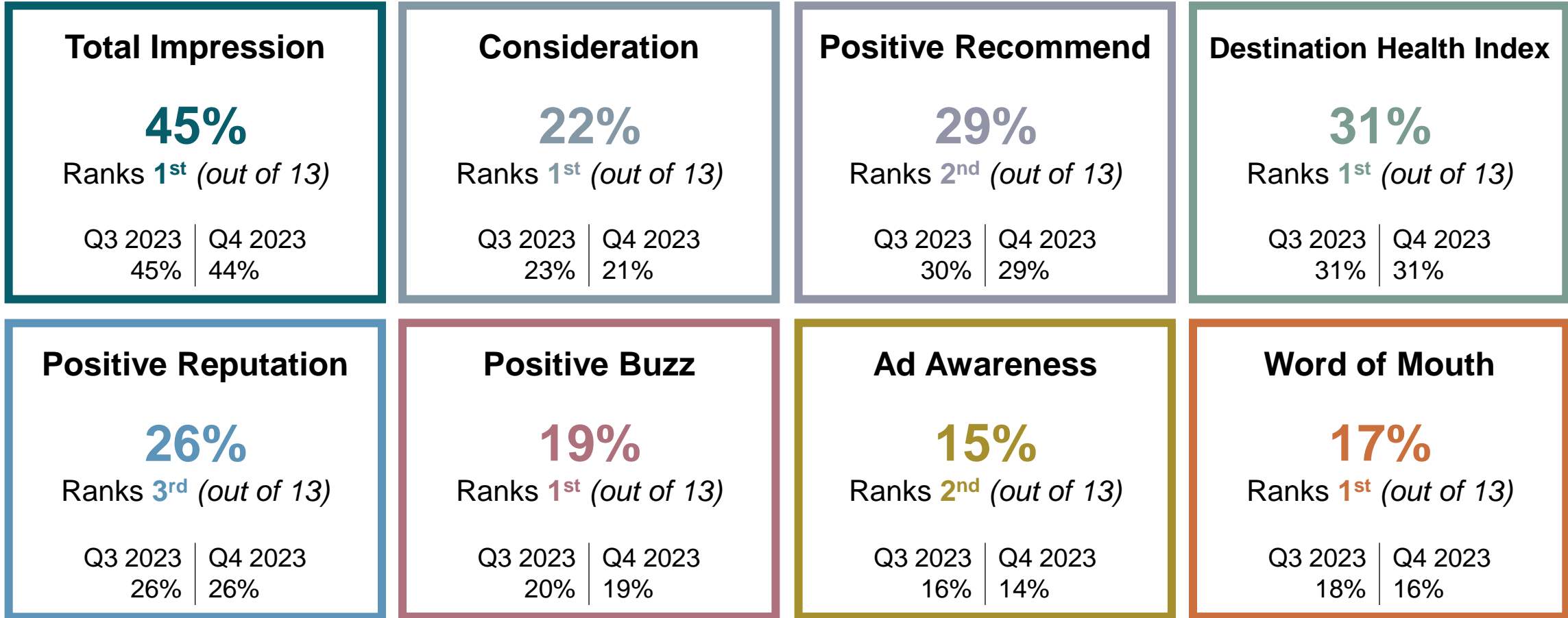
	Newfoundland & Labrador	New Brunswick	Saskatchewan	Yukon	Manitoba	Northwest Territories	Nunavut
Total Impression	27%	31%	22%	19%	21%	17%	16%
Consideration	11%	11%	5%	5%	5%	4%	3%
Positive Recommend	16%	19%	9%	9%	9%	7%	6%
Destination Health Index	16%	20%	11%	9%	11%	8%	6%
Positive Reputation	19%	19%	9%	10%	9%	8%	6%
Positive Buzz	10%	10%	7%	5%	6%	4%	4%
Ad Awareness	8%	6%	3%	3%	3%	2%	2%
Word of Mouth	6%	6%	5%	2%	4%	2%	2%



Performance Scorecard for Ontario (Jul-Dec 2023)



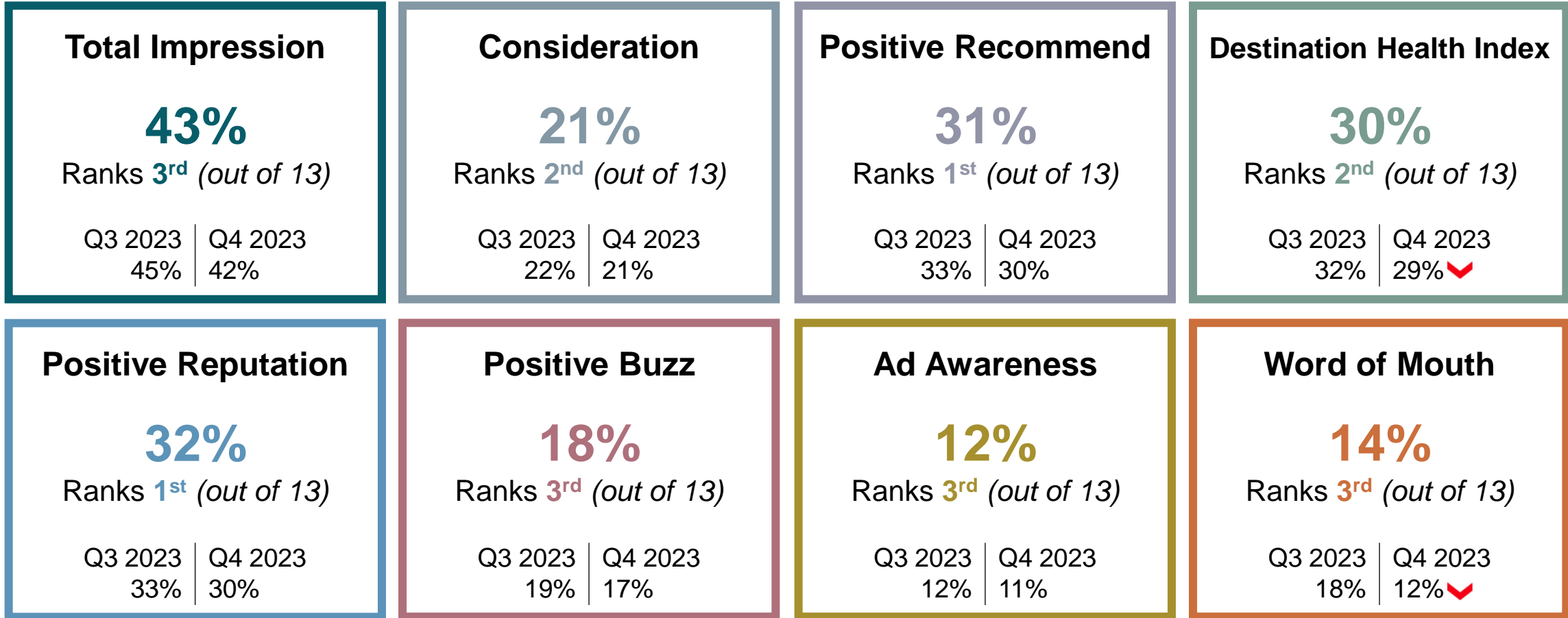
In the second half of 2023, Ontario was the top performing province or territory ranking first in five of eight key performance metrics and in the top three for all eight metrics, benefitting from Ontarians' positive perceptions of Ontario. Ontario's reputation is its lowest ranked metric, 3rd behind British Columbia and Québec



Performance Scorecard for British Columbia (Jul-Dec 2023)



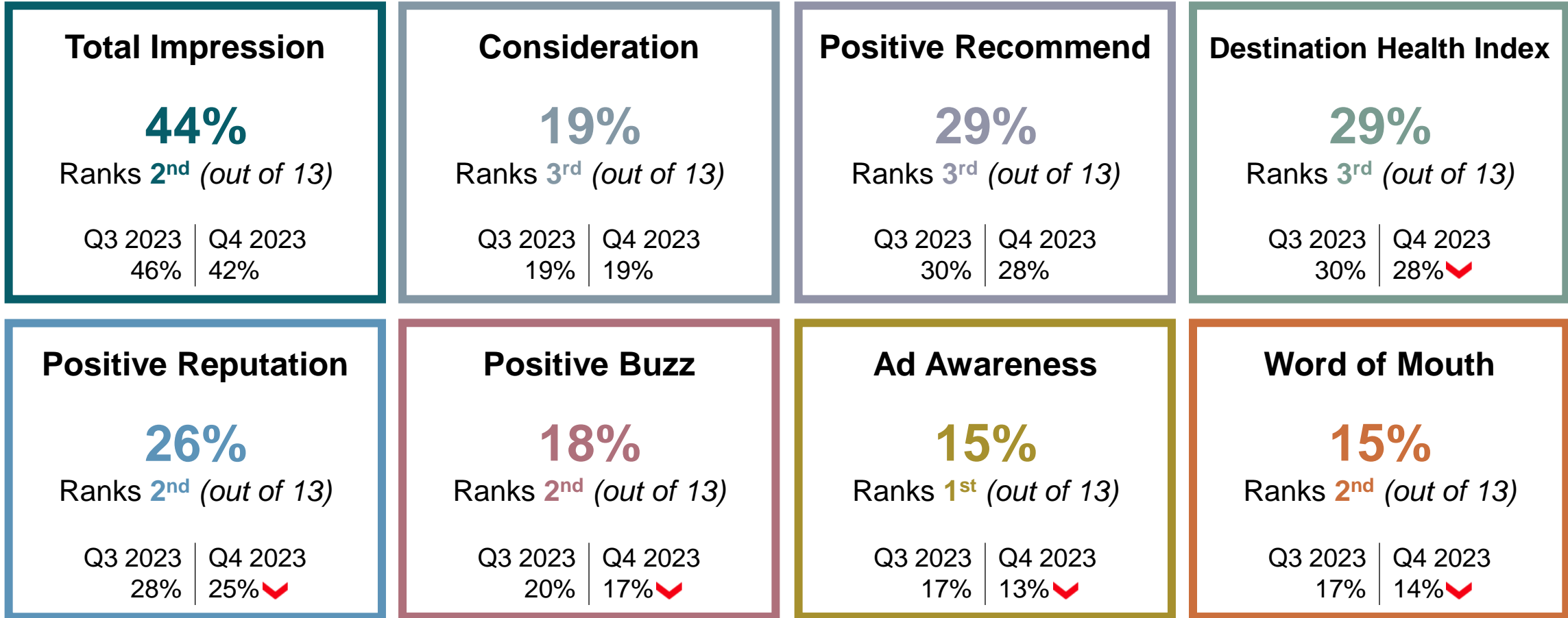
British Columbia was a top performing destination in the second half of 2023, ranking first in two of eight key performance metrics and in the top three for all eight metrics. British Columbia saw its overall destination health and word of mouth fall in Q4



Performance Scorecard for Québec (Jul-Dec 2023)



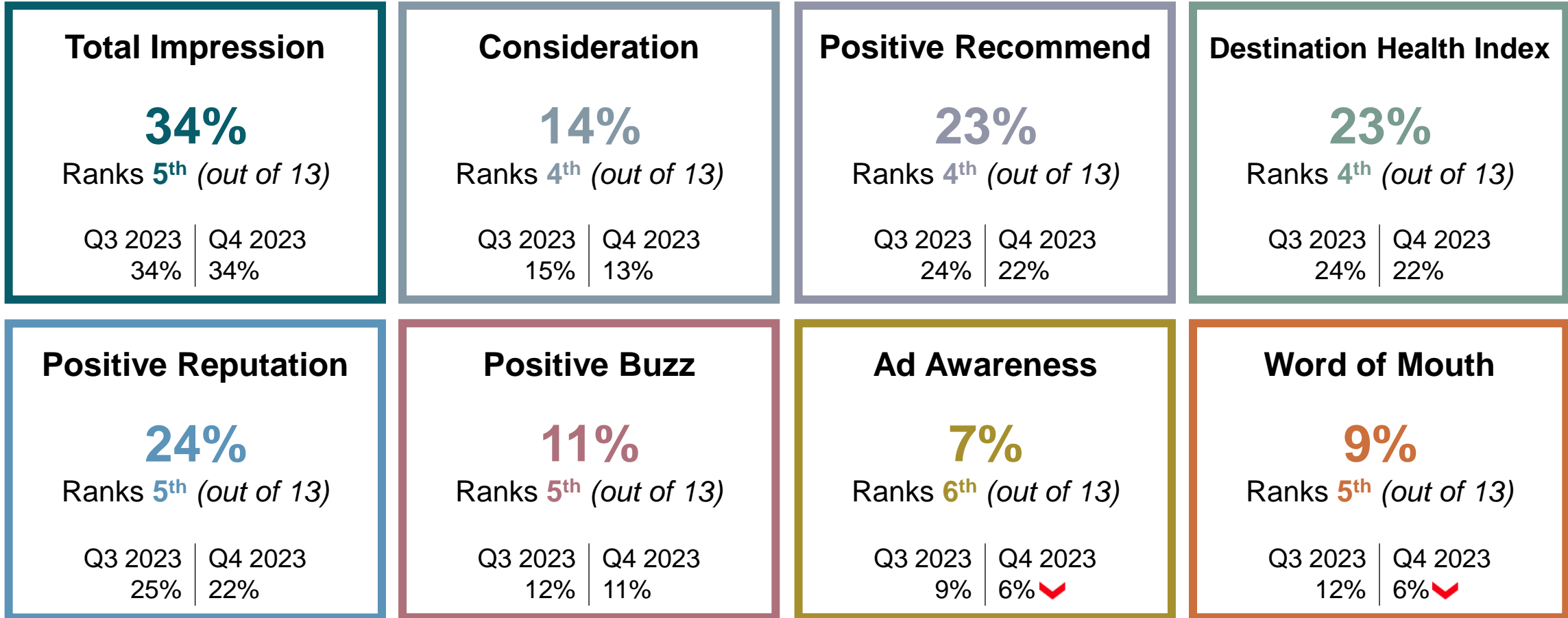
Québec was a top performing destination in the second half of 2023, ranking first in one of eight key performance metrics and in the top three for all eight metrics. While Québec's rank is among the highest of all provinces and territories, it saw Q4 scores decline in all metrics except total impression, consideration and recommend



Performance Scorecard for Nova Scotia (Jul-Dec 2023)



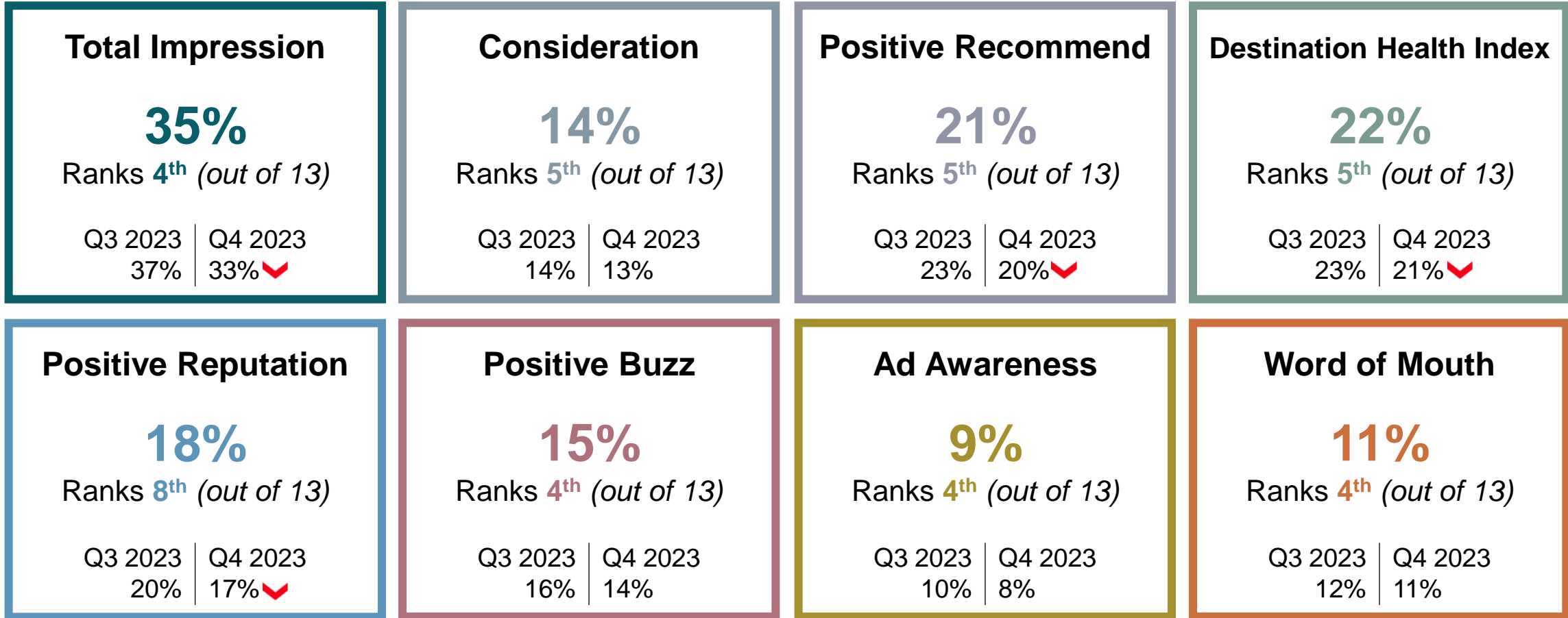
Consideration of Nova Scotia ranks fourth leading the second tier of provinces and territories. The province also scores fourth in recommendations and overall destination health. Word of mouth of Nova Scotia declined in Q4, potentially a result of fewer Canadians recalling ads for the province, a trend seen by all maritime provinces



Performance Scorecard for Alberta (Jul-Dec 2023)



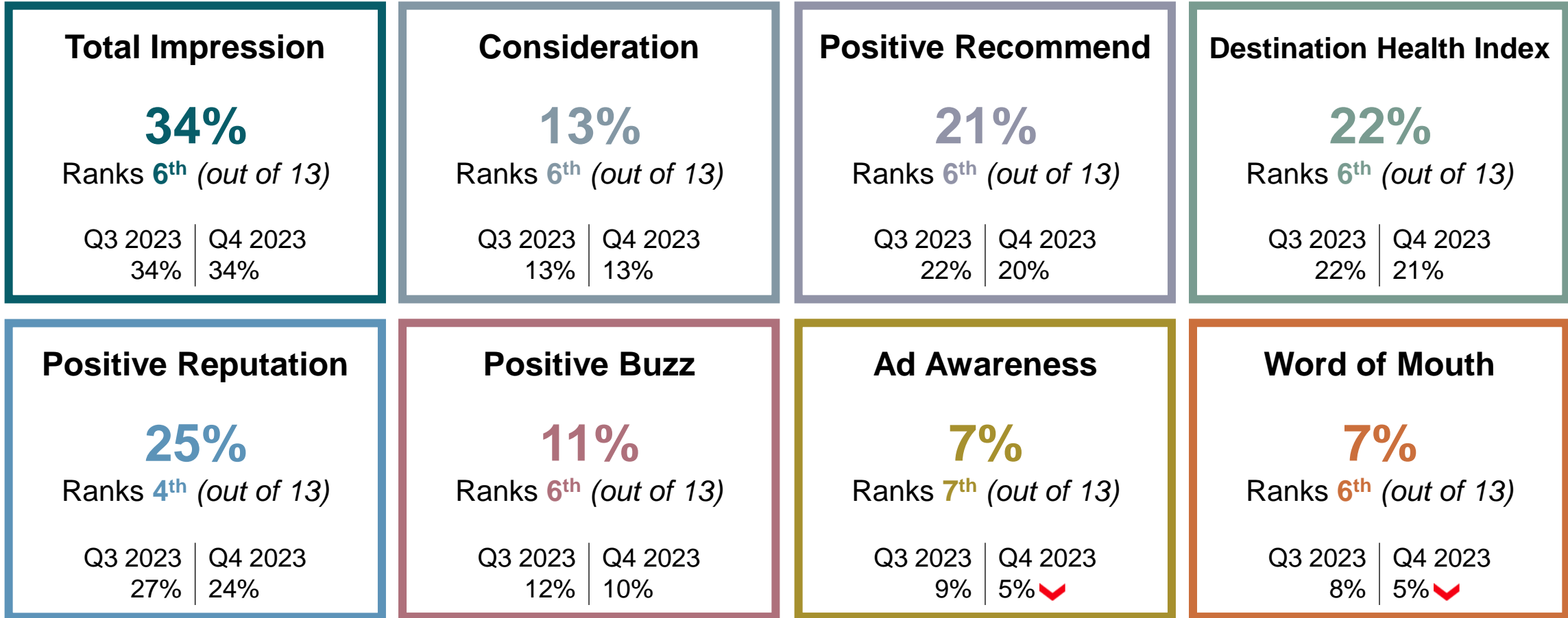
Alberta ranks fourth in four of eight key performance metrics, behind only Ontario, British Columbia and Québec. While the province scores well compared to other provinces and territories, multiple scores for Alberta declined in Q4 including reputation, where the province continues to rank in the bottom half of provinces and territories



Performance Scorecard for Prince Edward Island (Jul-Dec 2023)



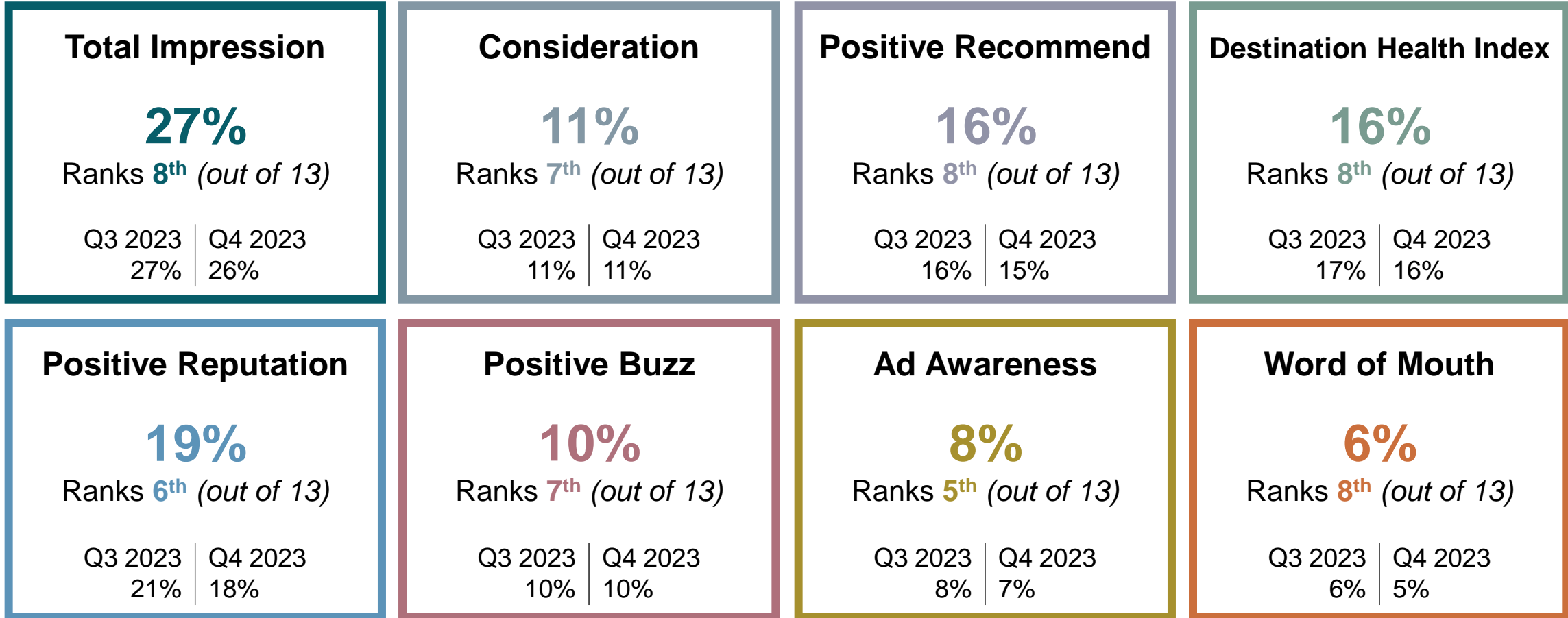
Reputation for vacations of Prince Edward Island is high, ranking behind only British Columbia, Québec and Ontario. The province scores middle-of-the-pack in all other metrics, ranking sixth or seventh. Like other maritime provinces, word of mouth fell in Q4, potentially due to a decrease in ad recall



Performance Scorecard for Newfoundland & Labrador (Jul-Dec 2023)



Despite ranking fifth in ad awareness, Newfoundland and Labrador ranks seventh or eighth in six of eight key performance metrics in the second half of 2023. While many provinces saw declines in Q4, scores for Newfoundland and Labrador were sustained.



Performance Scorecard for New Brunswick (Jul-Dec 2023)



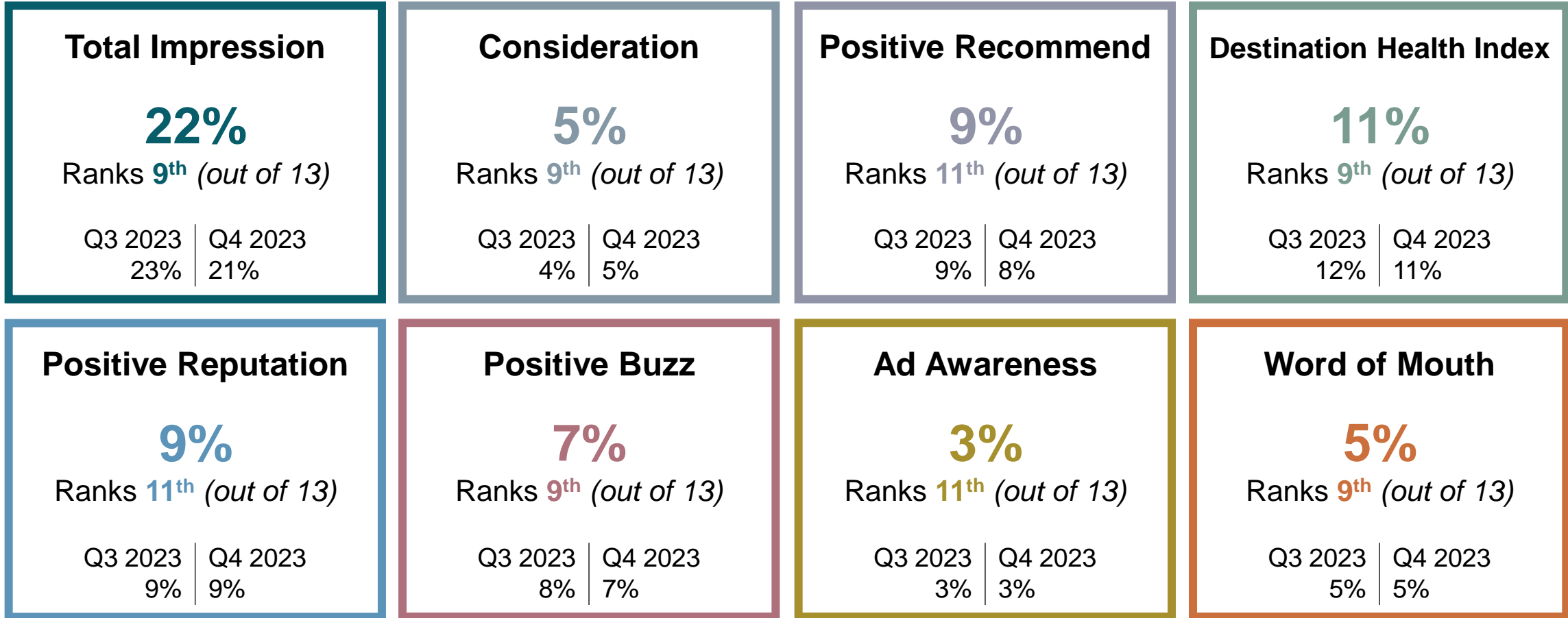
New Brunswick scores are average compared to other provinces and territories, as it ranks seventh in five of eight key performance metrics. Similar to other maritime provinces, word of mouth of New Brunswick fell in Q4, potentially due to a decrease in ad recall



Performance Scorecard for Saskatchewan (Jul-Dec 2023)



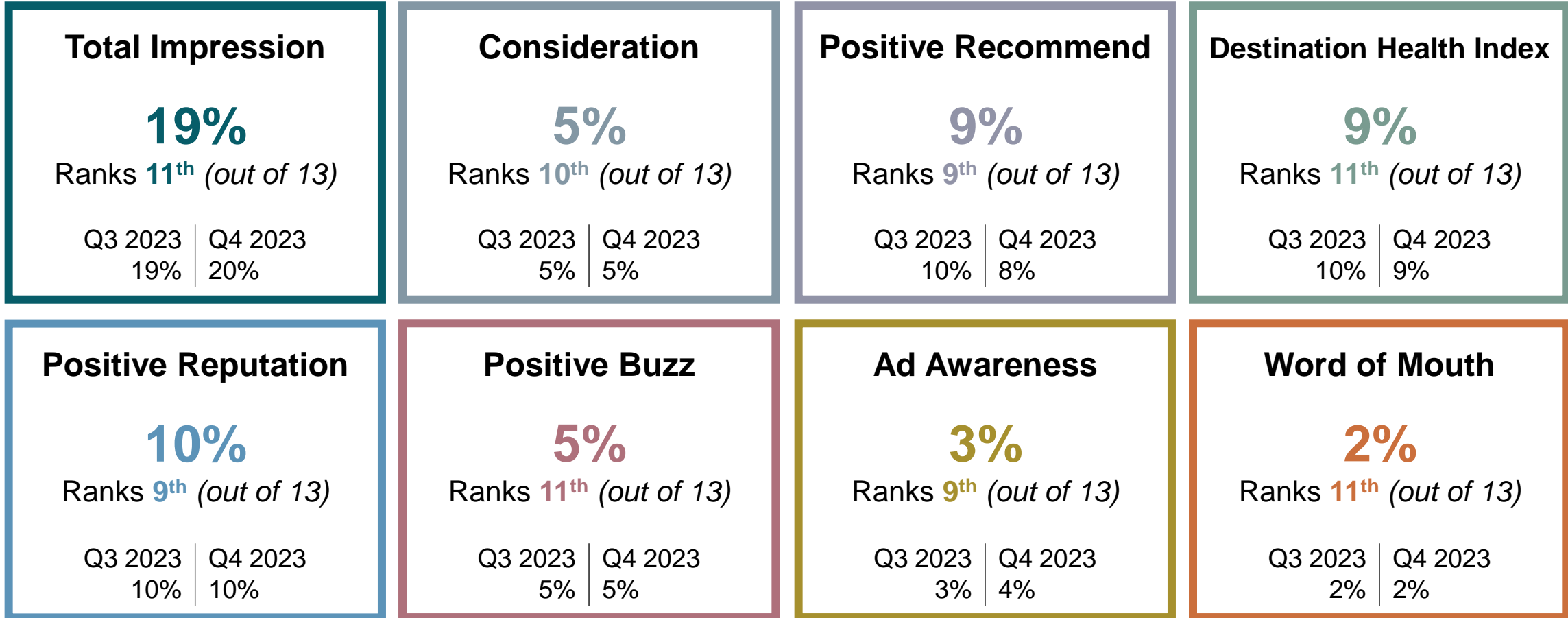
In the second half of 2023, Saskatchewan ranked in the bottom half of provinces and territories and ranked as low as eleventh in three of eight key performance metrics. Scores for Saskatchewan were consistent between 2023 Q3 and 2023 Q4



Performance Scorecard for Yukon (Jul-Dec 2023)



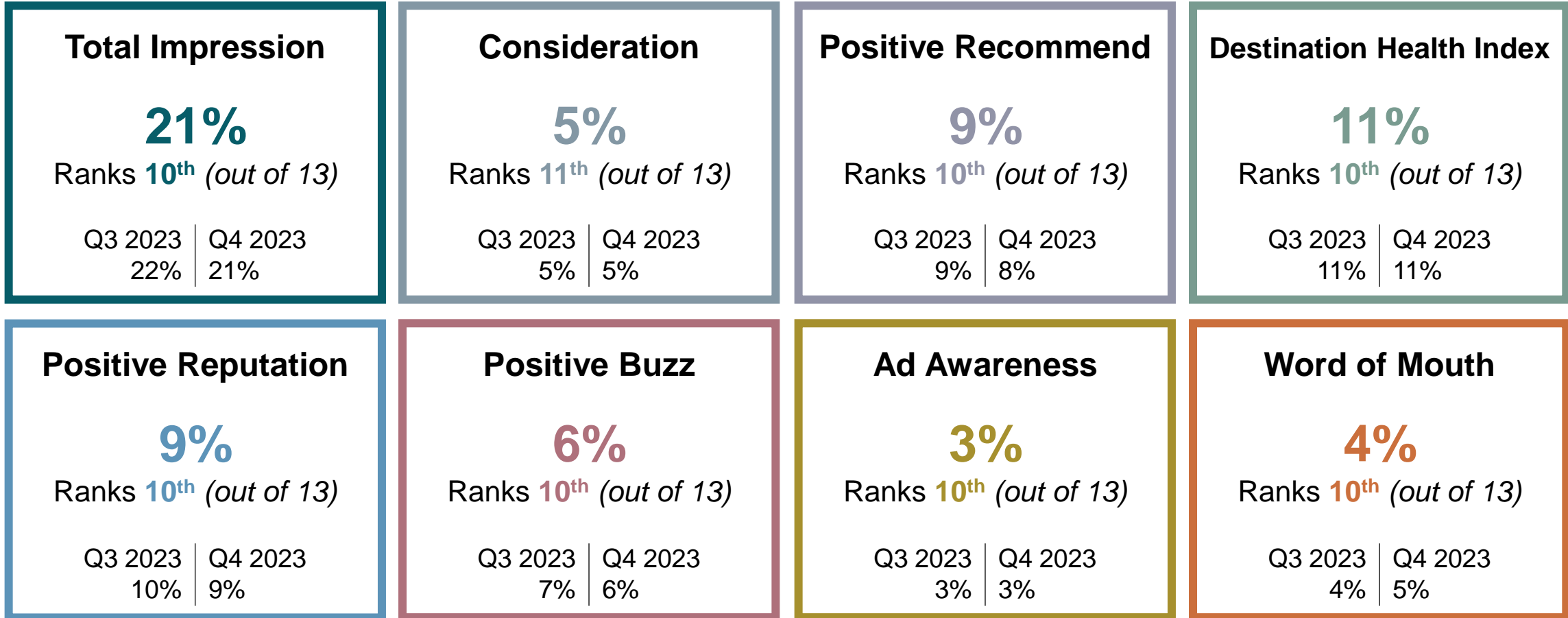
Yukon was the top performing territory, ranking ninth in three of eight metrics. Scores for Yukon were consistent between 2023 Q3 and Q4



Performance Scorecard for Manitoba (Jul-Dec 2023)



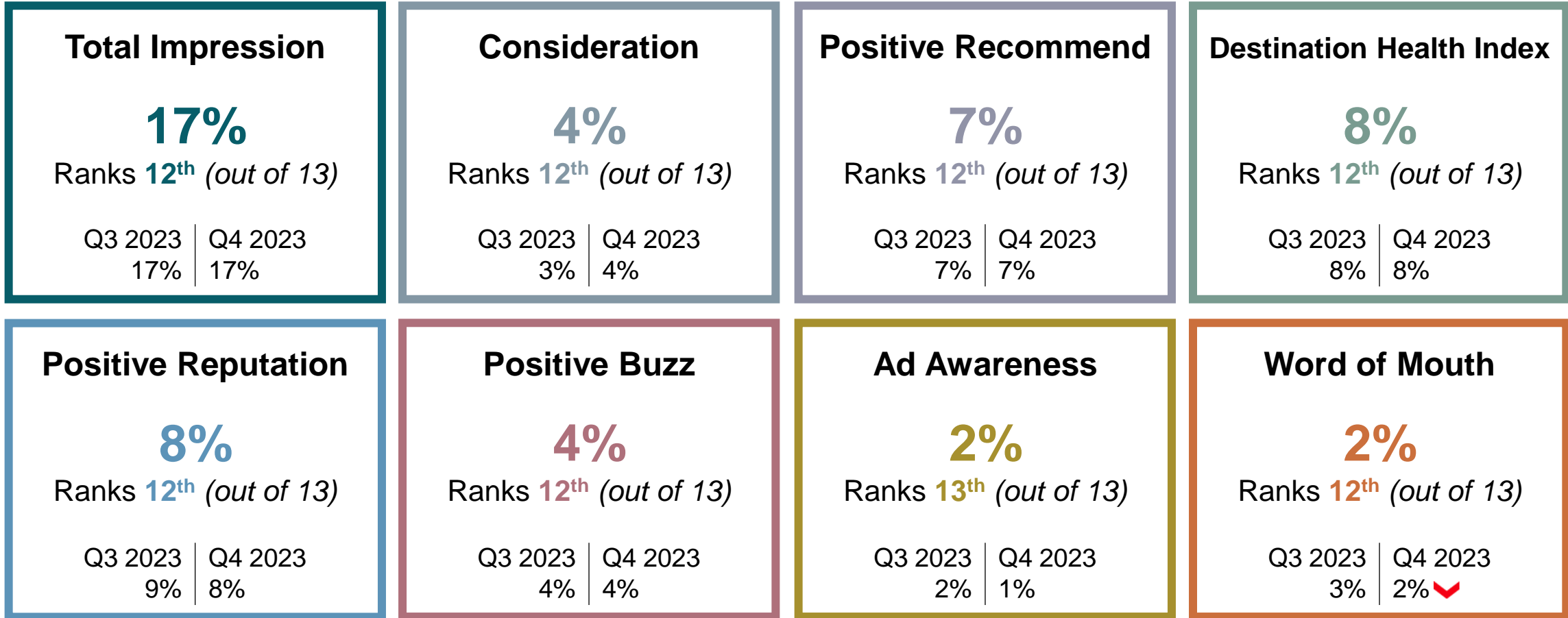
Manitoba was the lowest performing province in the second half of 2023, ranking ahead of only Northwest Territories and Nunavut. Manitoba ranks ahead of Saskatchewan in recommendations, reputation and ad awareness



Performance Scorecard for Northwest Territories (Jul-Dec 2023)



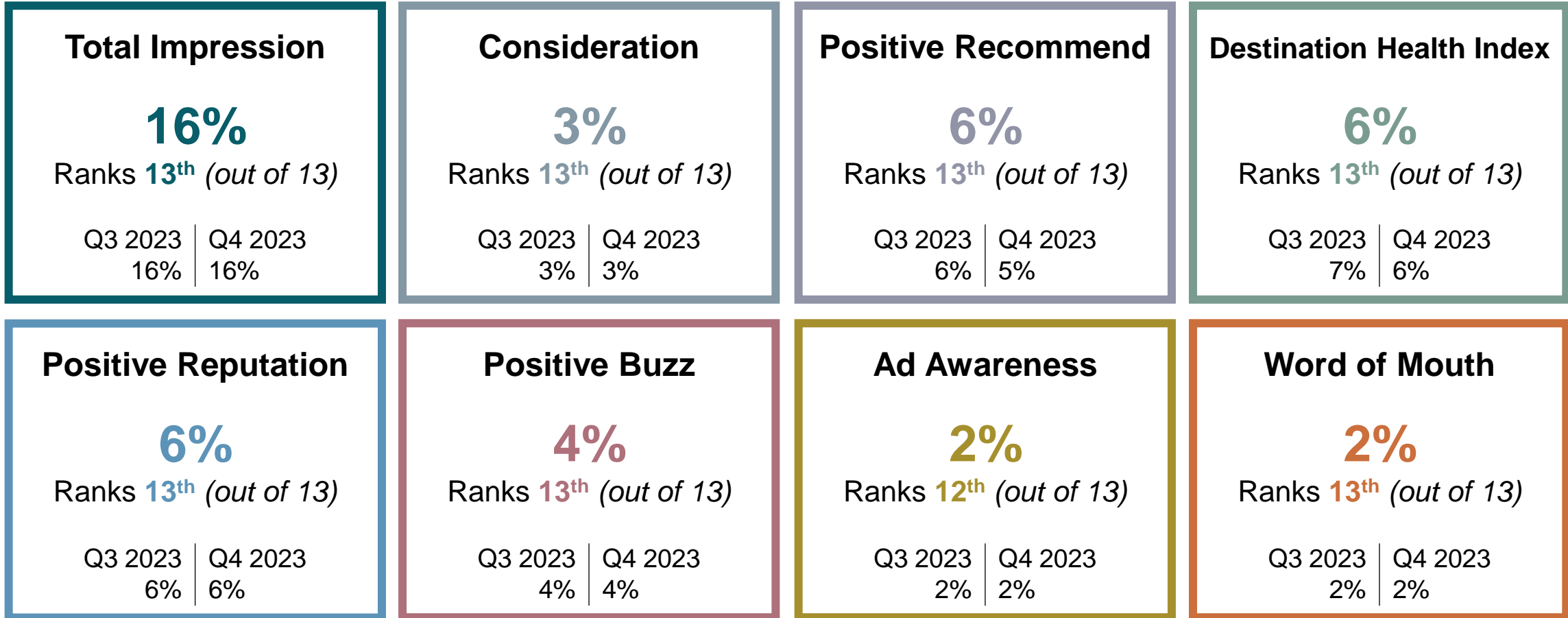
Northwest Territories is the second lowest scoring province or territory, ranking in the bottom two for all key performance metrics in the second half of 2023. Fewer Canadians talked about the territory in Q4, as word of mouth declined quarter-over-quarter



Performance Scorecard for Nunavut (Jul-Dec 2023)



Nunavut is the lowest scoring province or territory ranking last in seven of eight key performance metrics. Scores for Nunavut were consistent between 2023 Q3 and 2023 Q4





Appendix




St. John's
Newfoundland and Labrador



Total Impression: Positive + Negative Impression (Trended)



Total Impression

Rank	2023 Q3	2023 Q4
#1	Québec (46%)	Ontario (44%)
#2	Ontario (45%)	Québec (42%)
#3	British Columbia (45%)	British Columbia (42%)
#4	Alberta (37%)	Nova Scotia (34%)
#5	Nova Scotia (34%)	Prince Edward Island (34%)
#6	Prince Edward Island (34%)	Alberta (33%) 
#7	New Brunswick (32%)	New Brunswick (31%)
#8	Newfoundland & Labrador (27%)	Newfoundland & Labrador (26%)
#9	Saskatchewan (23%)	Saskatchewan (21%)
#10	Manitoba (22%)	Manitoba (21%)
#11	Yukon (19%)	Yukon (20%)
#12	Northwest Territories (17%)	Northwest Territories (17%)
#13	Nunavut (16%)	Nunavut (16%)

Consideration (Trended)

Consideration

Rank	2023 Q3	2023 Q4
#1	Ontario (23%)	Ontario (21%)
#2	British Columbia (22%)	British Columbia (21%)
#3	Québec (19%)	Québec (19%)
#4	Nova Scotia (15%)	Alberta (13%)
#5	Alberta (14%)	Nova Scotia (13%)
#6	Prince Edward Island (13%)	Prince Edward Island (13%)
#7	Newfoundland & Labrador (11%)	Newfoundland & Labrador (11%)
#8	New Brunswick (11%)	New Brunswick (10%)
#9	Yukon (5%)	Saskatchewan (5%)
#10	Manitoba (5%)	Yukon (5%)
#11	Saskatchewan (4%)	Manitoba (5%)
#12	Northwest Territories (3%)	Northwest Territories (4%)
#13	Nunavut (3%)	Nunavut (3%)

Positive Recommend (Trended)

Positive Recommend

Rank	2023 Q3	2023 Q4
#1	British Columbia (33%)	British Columbia (30%)
#2	Ontario (30%)	Ontario (29%)
#3	Québec (30%)	Québec (28%)
#4	Nova Scotia (24%)	Nova Scotia (22%)
#5	Alberta (23%)	Prince Edward Island (20%)
#6	Prince Edward Island (22%)	Alberta (20%) 
#7	New Brunswick (19%)	New Brunswick (19%)
#8	Newfoundland & Labrador (16%)	Newfoundland & Labrador (15%)
#9	Yukon (10%)	Manitoba (8%)
#10	Saskatchewan (9%)	Yukon (8%)
#11	Manitoba (9%)	Saskatchewan (8%)
#12	Northwest Territories (7%)	Northwest Territories (7%)
#13	Nunavut (6%)	Nunavut (5%)



Destination Health Index (Trended)





Destination Health Index

Rank	2023 Q3	2023 Q4
#1	British Columbia (32%)	Ontario (31%)
#2	Ontario (31%)	British Columbia (29%) ▼
#3	Québec (30%)	Québec (28%) ▼
#4	Nova Scotia (24%)	Nova Scotia (22%)
#5	Alberta (23%)	Prince Edward Island (21%)
#6	Prince Edward Island (22%)	Alberta (21%) ▼
#7	New Brunswick (20%)	New Brunswick (19%)
#8	Newfoundland & Labrador (17%)	Newfoundland & Labrador (16%)
#9	Saskatchewan (12%)	Saskatchewan (11%)
#10	Manitoba (11%)	Manitoba (11%)
#11	Yukon (10%)	Yukon (9%)
#12	Northwest Territories (8%)	Northwest Territories (8%)
#13	Nunavut (7%)	Nunavut (6%)




Positive Reputation (Trended)

Positive Reputation

Rank	2023 Q3	2023 Q4
#1	British Columbia (33%)	British Columbia (30%)
#2	Québec (28%)	Ontario (26%)
#3	Prince Edward Island (27%)	Québec (25%) 
#4	Ontario (26%)	Prince Edward Island (24%)
#5	Nova Scotia (25%)	Nova Scotia (22%)
#6	Newfoundland & Labrador (21%)	Newfoundland & Labrador (18%)
#7	New Brunswick (20%)	New Brunswick (18%)
#8	Alberta (20%)	Alberta (17%) 
#9	Yukon (10%)	Yukon (10%)
#10	Manitoba (10%)	Saskatchewan (9%)
#11	Saskatchewan (9%)	Manitoba (9%)
#12	Northwest Territories (9%)	Northwest Territories (8%)
#13	Nunavut (6%)	Nunavut (6%)

Positive Buzz (Trended)

Positive Buzz

Rank	2023 Q3	2023 Q4
#1	Québec (20%)	Ontario (19%)
#2	Ontario (20%)	British Columbia (17%)
#3	British Columbia (19%)	Québec (17%) 
#4	Alberta (16%)	Alberta (14%)
#5	Nova Scotia (12%)	Nova Scotia (11%)
#6	Prince Edward Island (12%)	Newfoundland & Labrador (10%)
#7	New Brunswick (10%)	Prince Edward Island (10%)
#8	Newfoundland & Labrador (10%)	New Brunswick (9%)
#9	Saskatchewan (8%)	Saskatchewan (7%)
#10	Manitoba (7%)	Manitoba (6%)
#11	Yukon (5%)	Yukon (5%)
#12	Northwest Territories (4%)	Northwest Territories (4%)
#13	Nunavut (4%)	Nunavut (4%)

Ad Awareness (Trended)

Ad Awareness

Rank	2023 Q3	2023 Q4
#1	Québec (17%)	Ontario (14%)
#2	Ontario (16%)	Québec (13%) ▼
#3	British Columbia (12%)	British Columbia (11%)
#4	Alberta (10%)	Alberta (8%)
#5	Prince Edward Island (9%)	Newfoundland & Labrador (7%)
#6	Nova Scotia (9%)	Nova Scotia (6%) ▼
#7	Newfoundland & Labrador (8%)	Prince Edward Island (5%) ▼
#8	New Brunswick (8%)	New Brunswick (4%) ▼
#9	Manitoba (3%)	Yukon (4%)
#10	Saskatchewan (3%)	Manitoba (3%)
#11	Yukon (3%)	Saskatchewan (3%)
#12	Northwest Territories (2%)	Nunavut (2%)
#13	Nunavut (2%)	Northwest Territories (1%)



Word of Mouth (Trended)

Word of Mouth

Rank	2023 Q3	2023 Q4
#1	Ontario (18%)	Ontario (16%)
#2	British Columbia (18%)	Québec (14%) ▼
#3	Québec (17%)	British Columbia (12%) ▼
#4	Alberta (12%)	Alberta (11%)
#5	Nova Scotia (12%)	Nova Scotia (6%) ▼
#6	Prince Edward Island (8%)	Prince Edward Island (5%) ▼
#7	New Brunswick (8%)	Newfoundland & Labrador (5%)
#8	Newfoundland & Labrador (6%)	Saskatchewan (5%)
#9	Saskatchewan (5%)	New Brunswick (5%) ▼
#10	Manitoba (4%)	Manitoba (5%)
#11	Northwest Territories (3%)	Yukon (2%)
#12	Yukon (2%)	Nunavut (2%)
#13	Nunavut (2%)	Northwest Territories (2%) ▼

47 July-December 2023 Quarterly Trending Base Range: Canadians 18+ (n=1,463-1,806)
 Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?



THANK YOU

For any questions, please reach out to research@destinationcanada.com



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