

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT

TOTAL UNITED STATES VS. HIGH VALUE GUEST AUDIENCE



CANADIAN TOURISM DATA
collective

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Study Overview: United States Market



The target population are residents aged 18 years and older who have taken an out of state vacation trip, where they had stayed at least 1 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

HVG Audience Definition: Americans who have visited Canada recently, earn \$90K+ median household income per year, and live in California, New York/New Jersey, or Texas. HVGs belong to nine PRIZM segments that highly index with this criteria.



Timing of Fieldwork

December 4th – 15th 2023



Geographical Definition for Qualified Trips

Outside of: your state



Sample Distribution

Sample distribution:	National
High Value Guest (HVG) Audience:	260
Other travellers:	3911
Total sample size:	4171

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.
 - As a result, no trending is available for the US market.





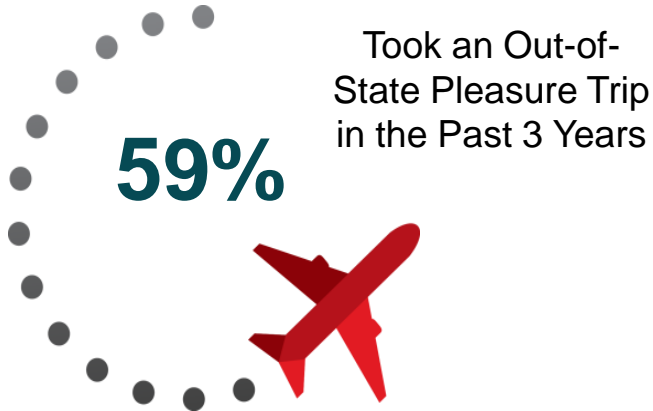
Market Sizing



Yellowknife
Northwest Territories



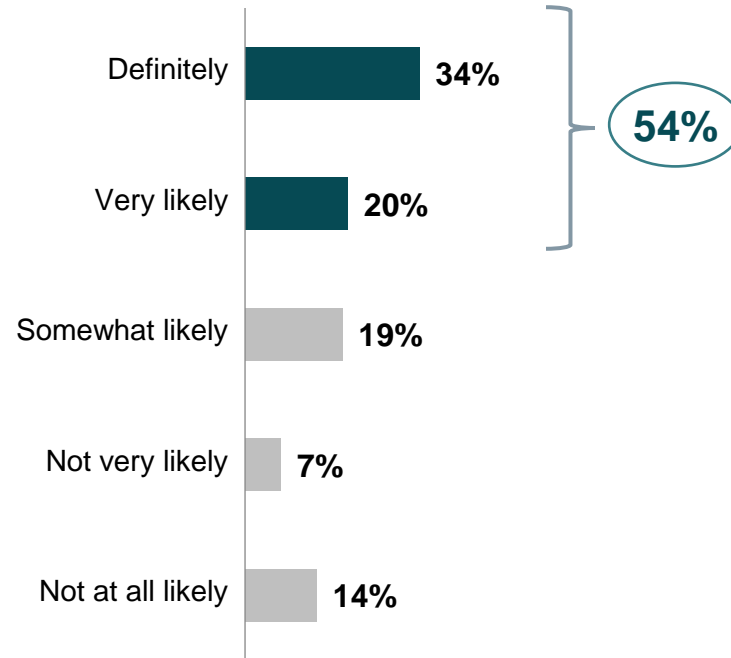
Incidence of Out-of-State Pleasure Travel (General Population)



Current Passport Holders/Intenders

64%

Plan to Take Out-of-State Pleasure Trip in Next 2 Years



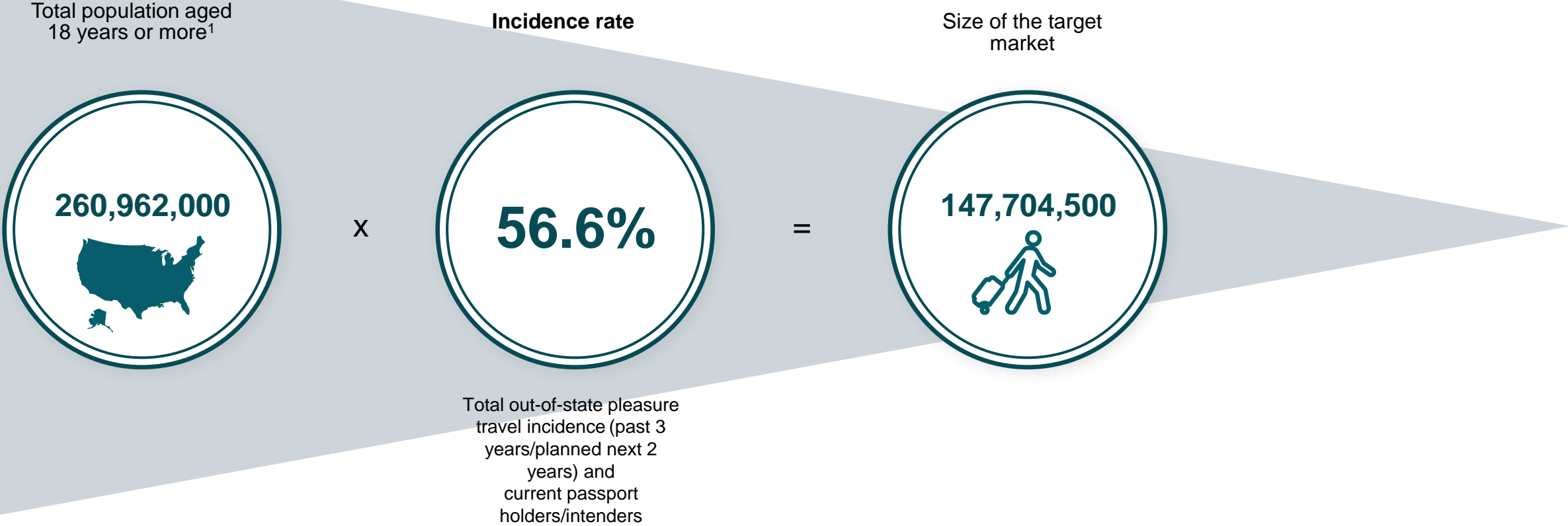
Incidence Rate



Total out-of-state pleasure travel incidence (past 3 years/planned next 2 years) and current passport holders/intenders



Out-of-State Pleasure Traveller Sizing

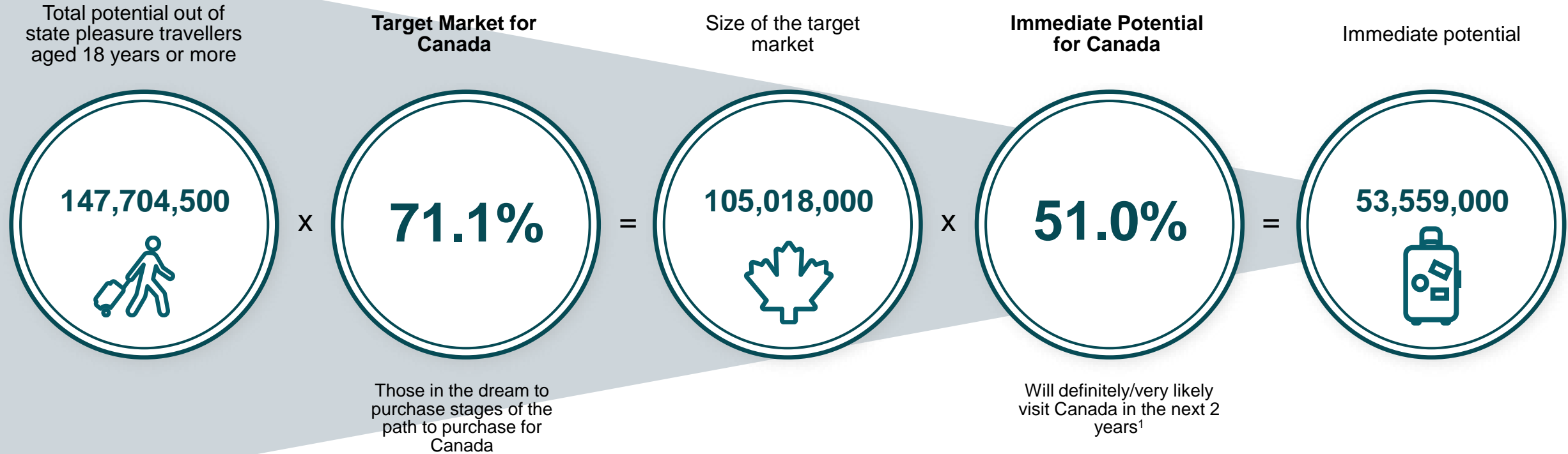


6 ¹ Source: Estimates 2022 American Community Survey, United States Census Bureau
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=1150)

Potential Market Size For Canada



Size of the Potential Market to Canada (Next 2 Years)



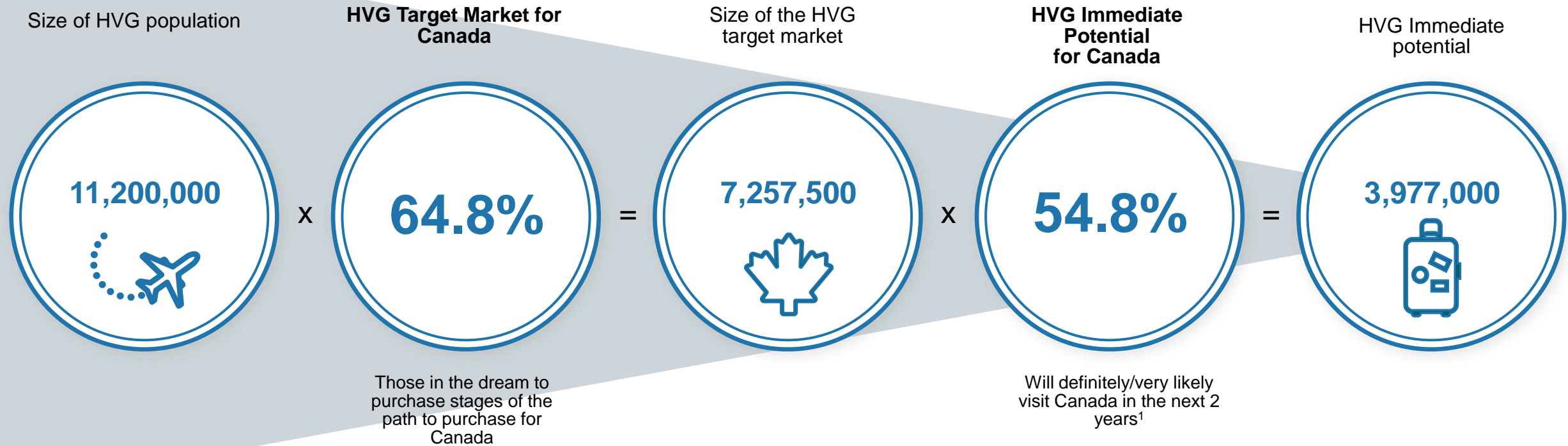
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = out of state pleasure travellers (past 3 years or next 2 years) (n=4171); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=2919)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)
E1. Realistically, how likely are you to take a vacation trip to Canada in the **next 2 years**? (Select one)



Potential Market Size For Canada



Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*



¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = out of state pleasure travellers (past 3 years or next 2 years), HVG Audience (n=260); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=167)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)
E1. Realistically, how likely are you to take a vacation trip to Canada in the **next 2 years**? (Select one)



Potential Market Size for the Regions

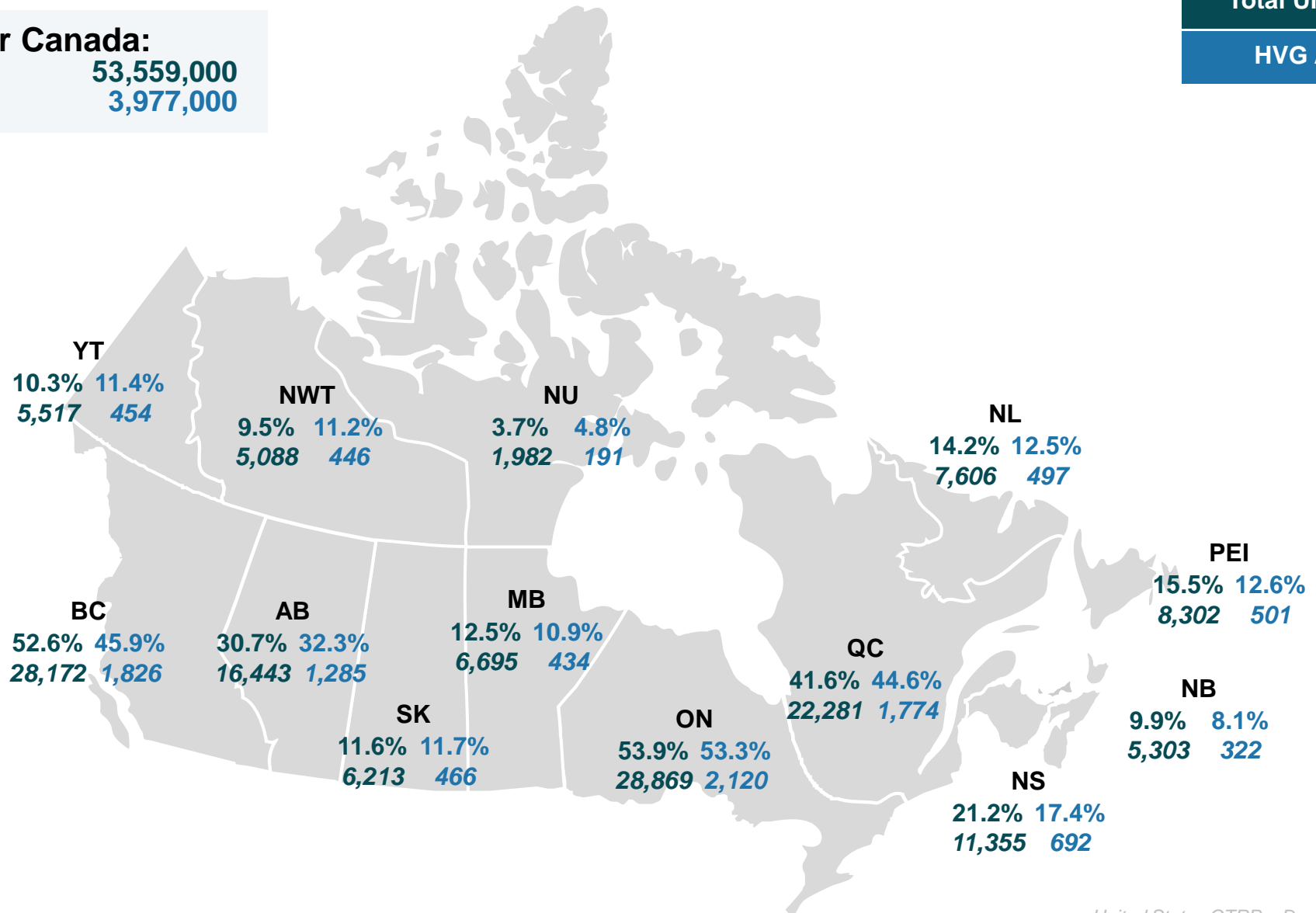


Total United States

HVG Audience

Immediate Potential for Canada:
 Total United States: 53,559,000
 HVG Audience: 3,977,000

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





Key Performance Indicators



Prince Albert National Park
Saskatchewan



Key Performance Indicators



Indicator	Definition	All Out of State Travellers (n=4171)	HVG Audience (n=260)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ¹	7%	6%
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	46%	47%
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	38%	34%
Past visitation	% who have ever visited Canada for pleasure	64%	71% +

¹For trips in the next 2 years

Base: Out of state pleasure travellers (past 3 years or next 2 years)

B1. You mentioned that you are likely to take a out of state vacation trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1

means 'I am definitely not considering' and 5 means 'I am seriously considering'.

C5. How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

B5. Which of the following countries or regions have you visited while on a vacation trip **outside of your state** which was 4 or more nights long?



Key Performance Indicators: Seasonal & Indigenous



Indicator	Definition	All Out of State Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada ¹	9%	7%
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November ²	47%	44%
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada ¹	11%	9%
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February ²	27%	22%
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	5%	3%

¹Among respondents who answered about winter/fall travel

²Among those in the dream to purchase stages of the path to purchase to Canada

Base: Out of state pleasure travellers (past 3 years or next 2 years)

B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=2116); HVG (n=138)

B3. What destinations come to mind when thinking about travel to experience the **fall** season? Total (n=2055); HVG (n=122)

C7. For each of the following destinations, during which months would you consider taking a vacation trip in the **next 2 years**? Total (n=2919); HVG (n=167)

B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=4171); HVG (n=260)





Market Outlook



St. John's

Newfoundland and Labrador



Market Outlook



Indicator	Definition	All Out of State Travellers (n=4171)	HVG Audience (n=260)
Incidence of out of state pleasure travel	% who have taken an out of state pleasure trip in the past 3 years	91%	94%
Out of state travel intentions	% who plan ¹ to take an out of state pleasure trip in the next 2 years	81%	79%
Market Outlook (Net change in out of state travel)	% who will <u>spend a little more</u> on travel outside of your state in the next 12 months MINUS % who will <u>spend a little less</u>	-5%	-12%

¹ Who are 'Definitely' or 'Very Likely' to take an out of state trip in the next 2 years.

Base: Out of state pleasure travellers (past 3 years or next 2 years)

A7. In the past 3 years, have you taken an out of state vacation trip of 4 or more nights where you spent at least 1 night in paid accommodations? (Select one only)

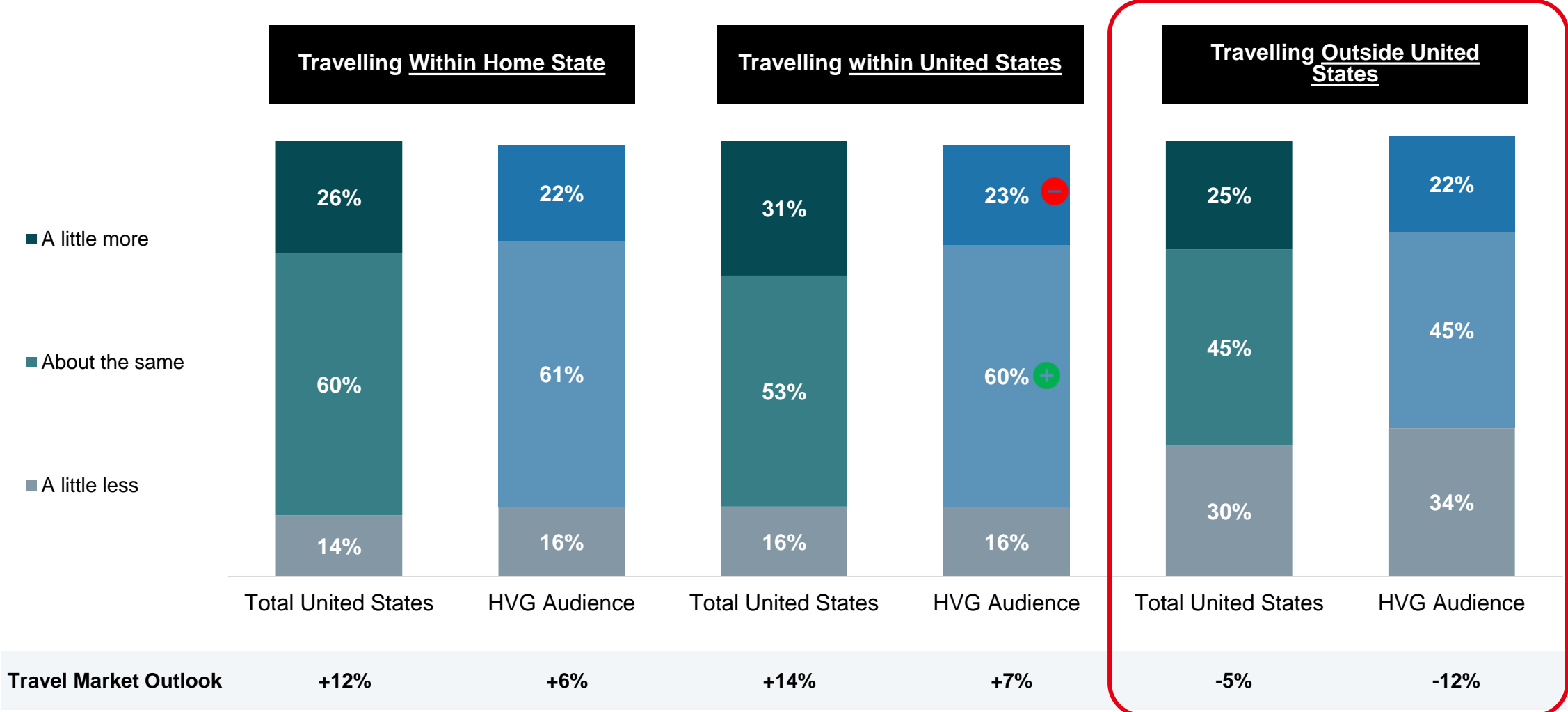
A9. In the next 2 years, how likely is it that you will take an out of state vacation trip of 4 or more nights where you will spend at least 1 night in paid accommodations? (Select one only)

(Select one only)

A5. How would you describe your spending intentions on the following items in the next 12 months compared to the 12 months? Will you spend...



Spending Intentions (in Next 12 Months)



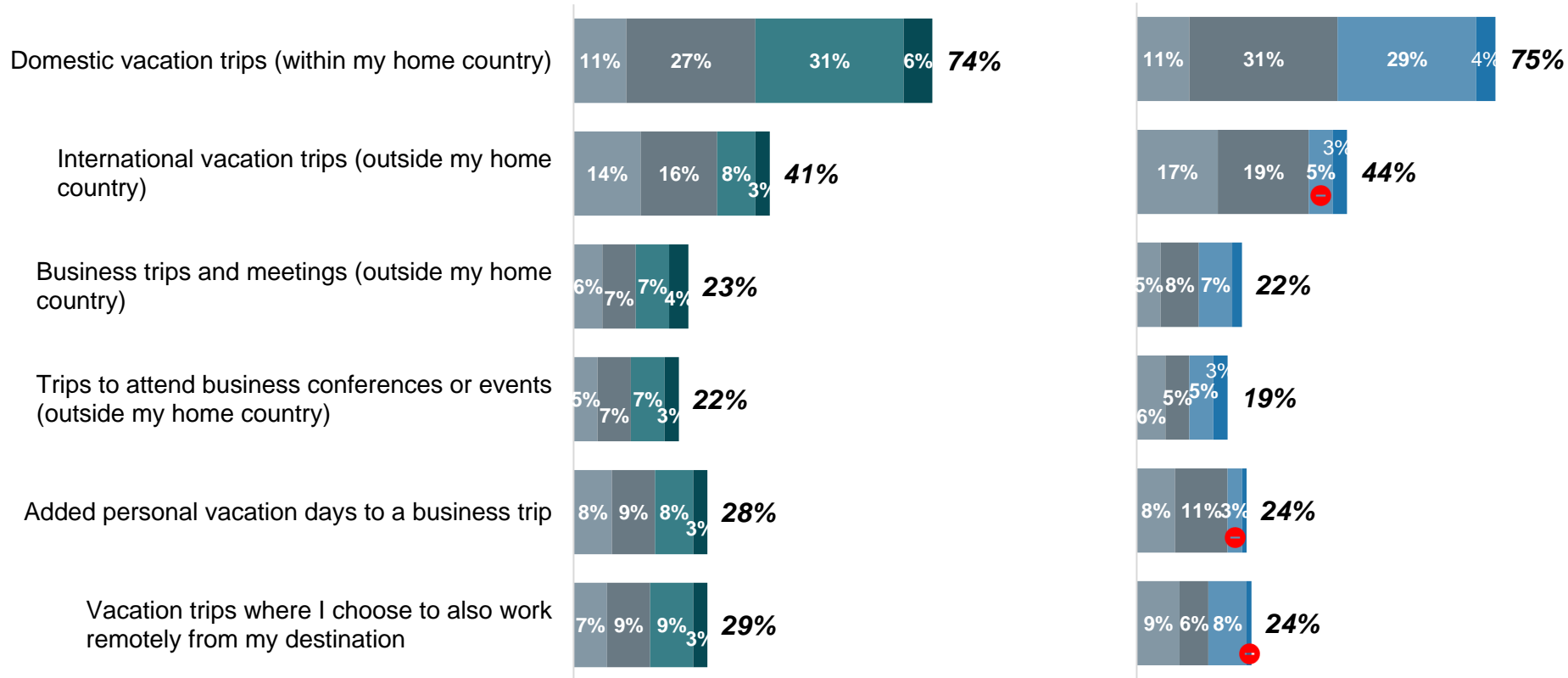
Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
 A5. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend...

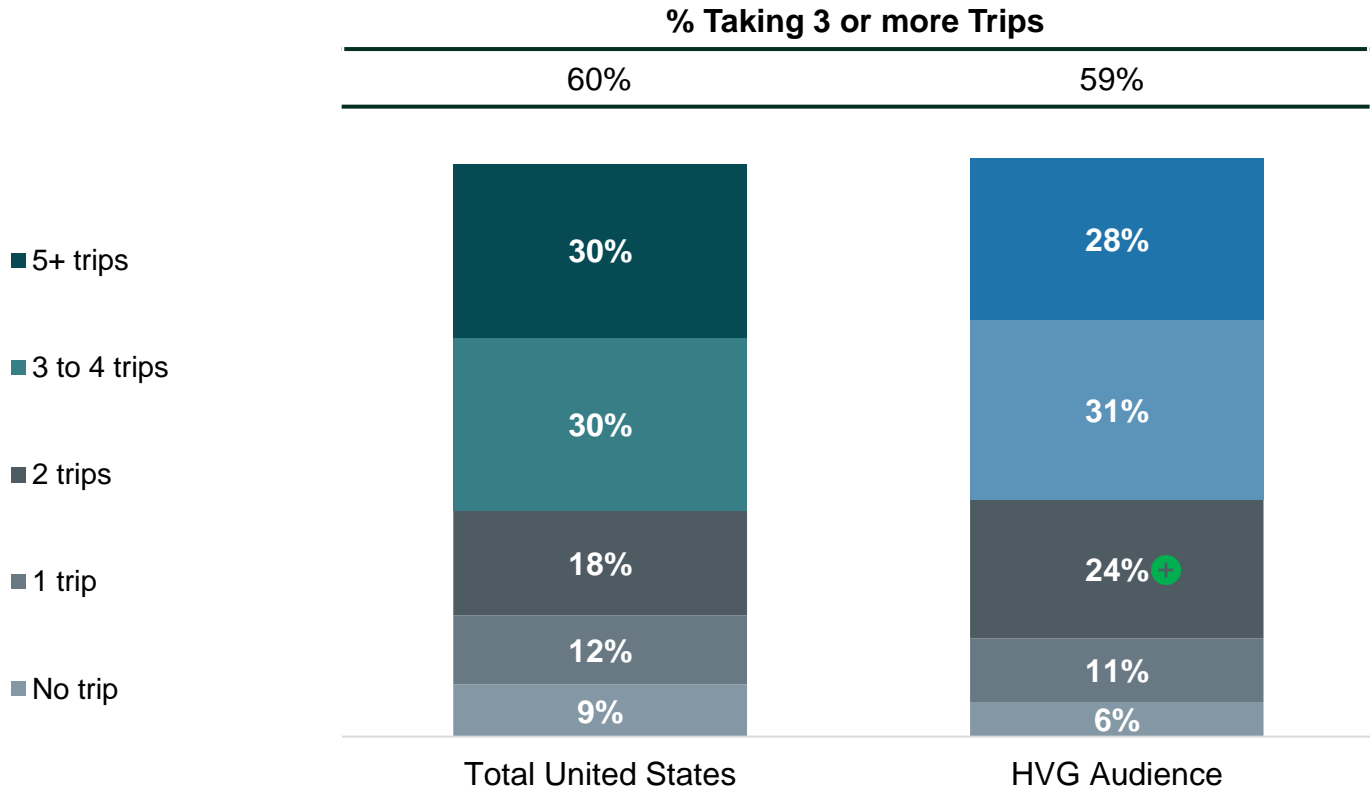
Types of Travel Trips

Total United States

HVG Audience

■ Sometimes (once every 2 years)
 ■ Regularly (once a year)
 ■ Often (several times a year)
 ■ Very often (about once a month or more)
 ■ At least every 2 years







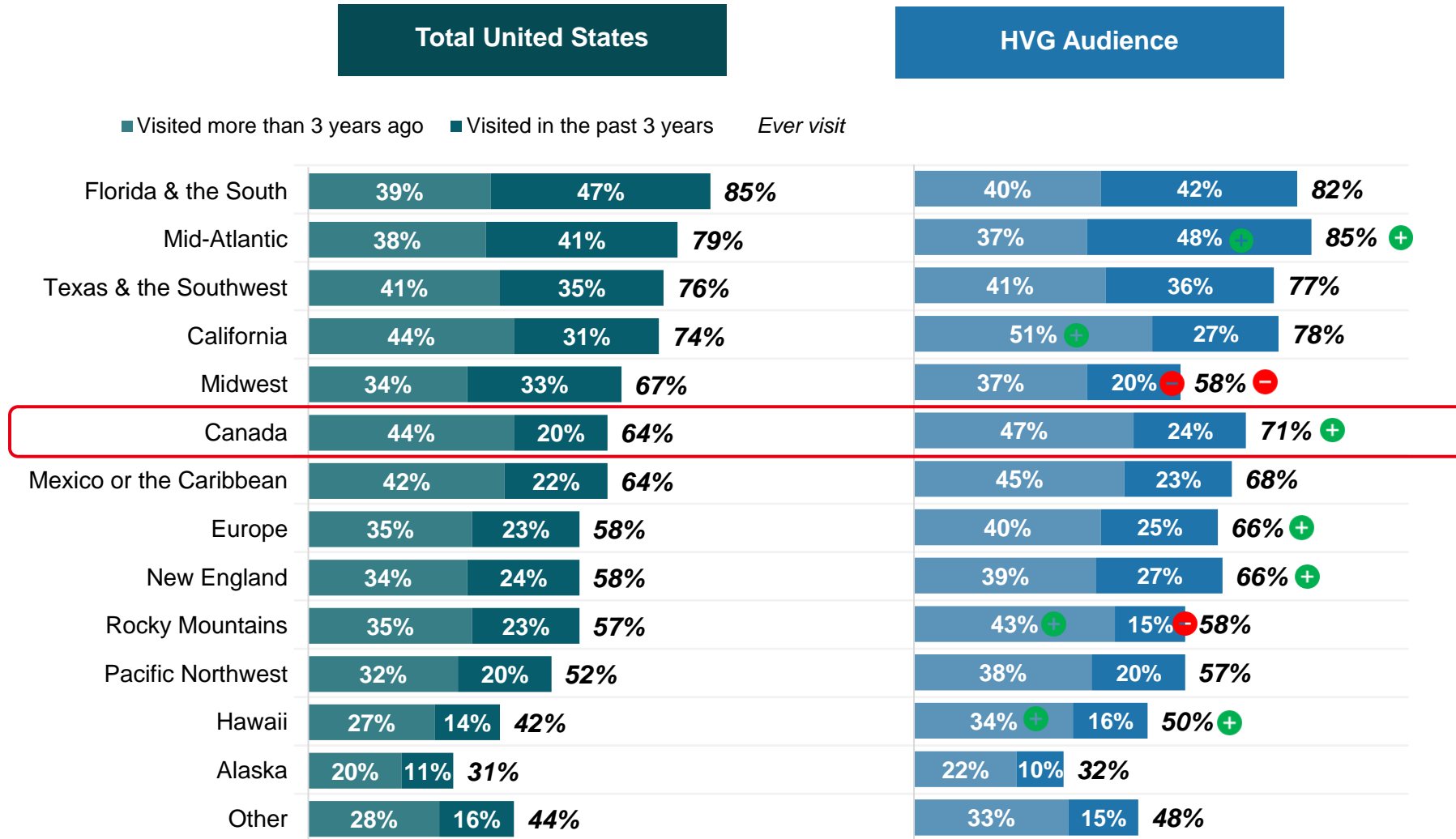
Canada vs. Competitors



Peggy's Cove
Nova Scotia



Past Visitation



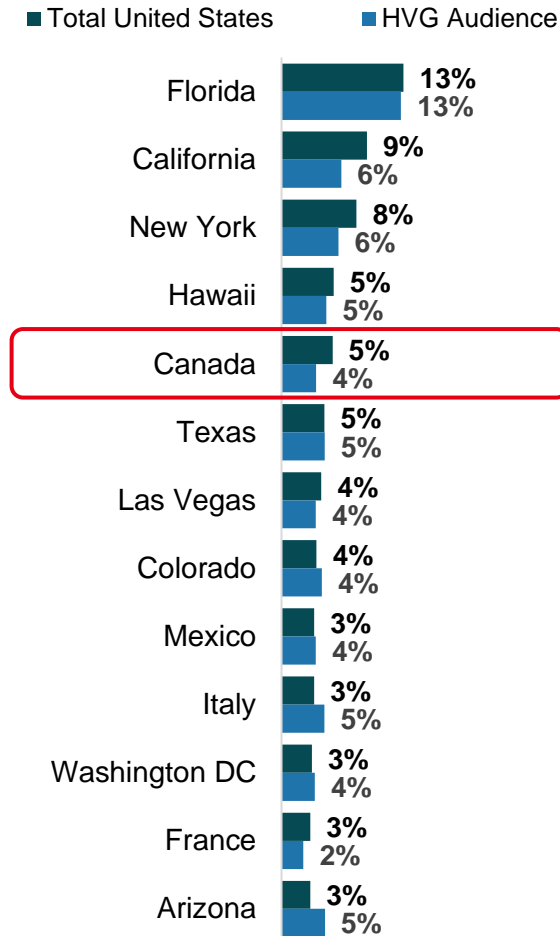
Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
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 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
 B5. Which of the following countries or regions have you visited while on a vacation trip **outside of your state** which was 1 or more nights long?



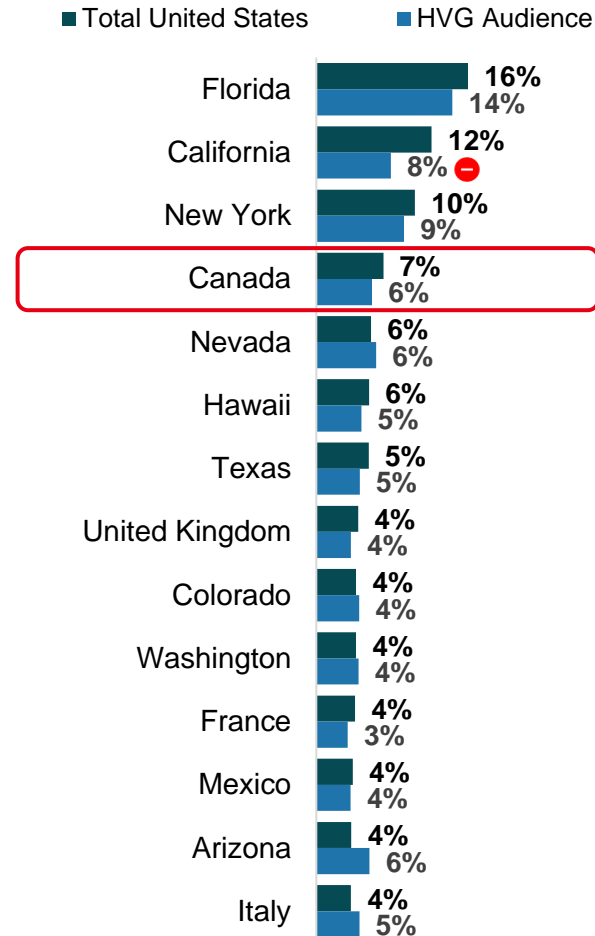
Unaided Destination Consideration (Next 2 Years)



Top Destination Brands¹



Top Destinations²



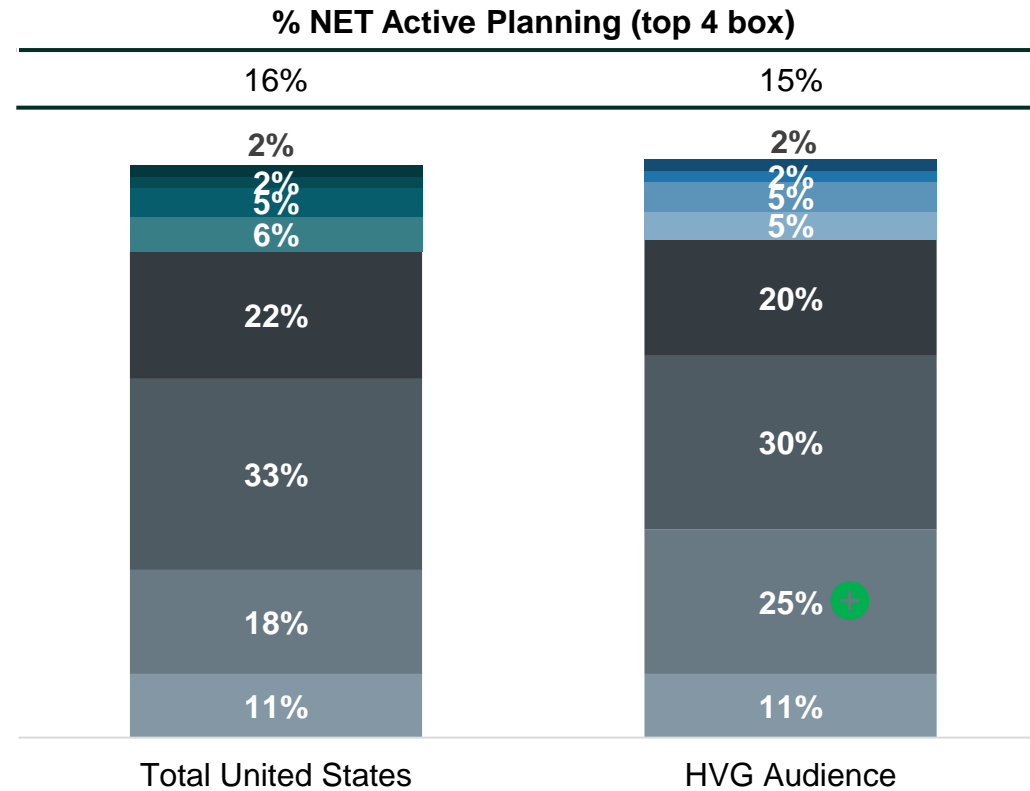
¹ Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
² Roll-up of brand mentions by US State/country (e.g., percentage who said "Canada" or any destination in Canada).
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
 B1. You mentioned that you are likely to take a out of state vacation trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



Path to Purchase for Canada



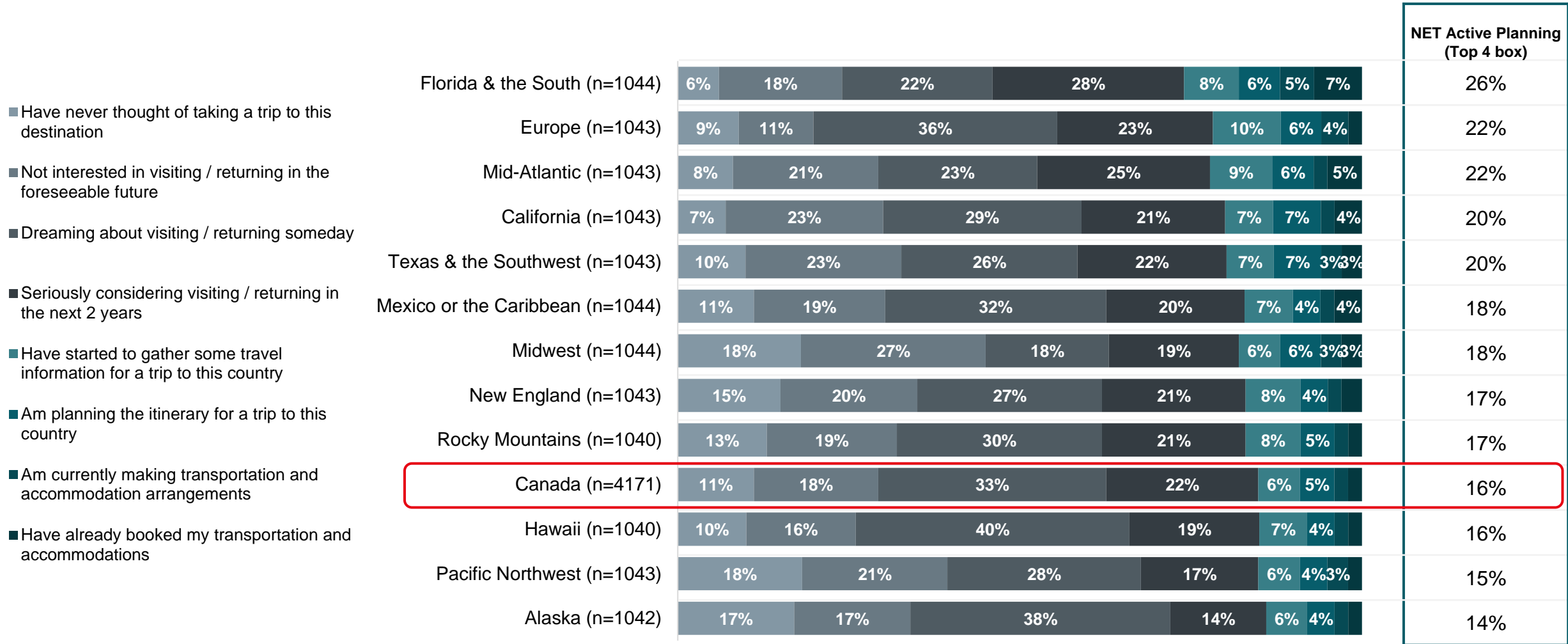
- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



21 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)

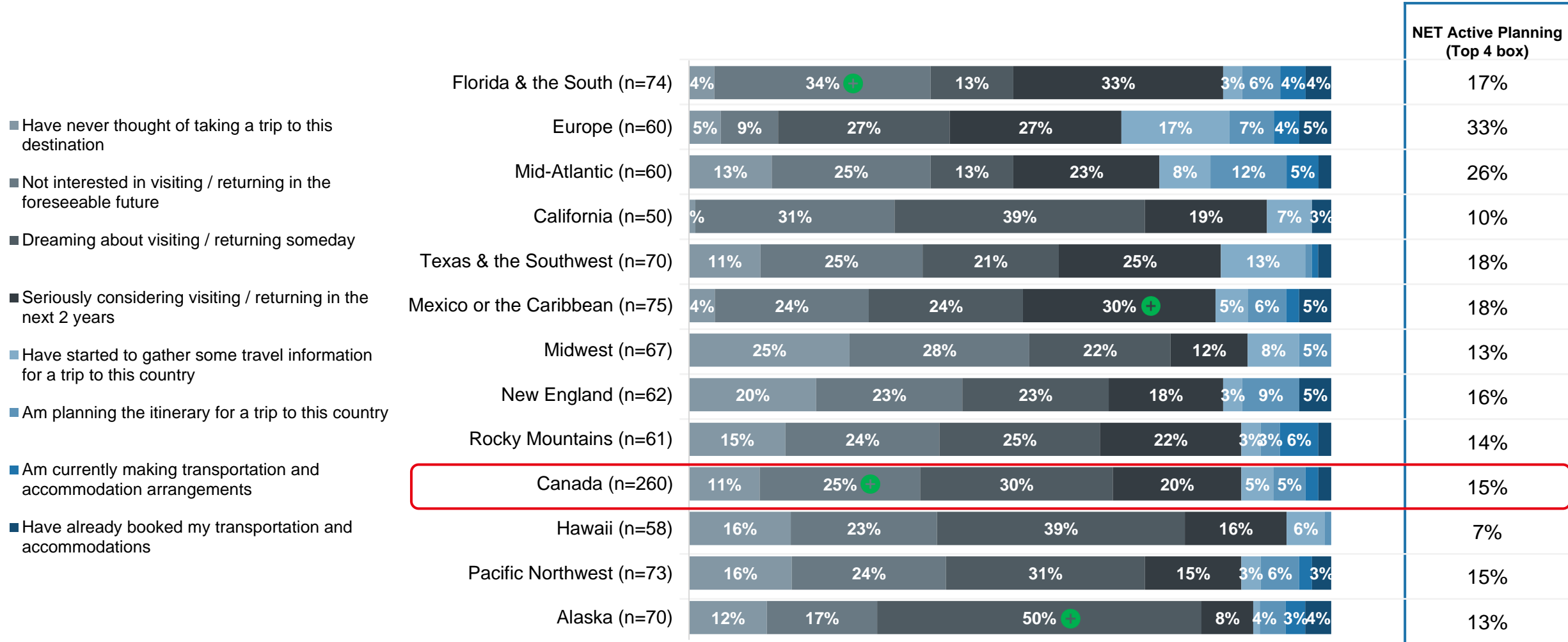
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)

Stage in the Purchase Cycle: Total United States



Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)

Stage in the Purchase Cycle: Among HVG Audience



Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
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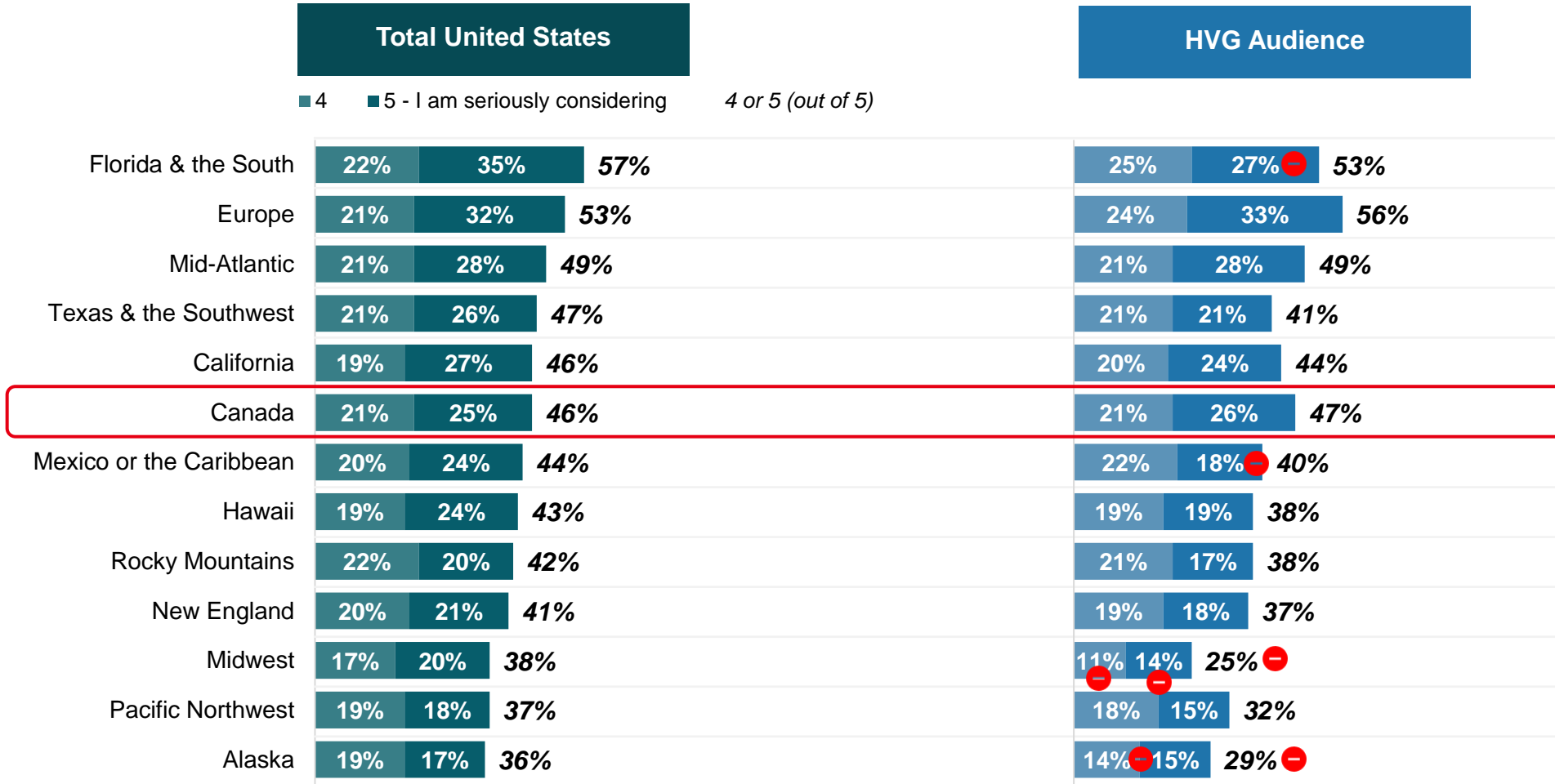
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)

United States GTRP – December 2023



+ / - = significantly higher/lower result (vs. Total)

Destination Consideration (Next 2 Years)



Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
 C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.



Destination Consideration By Seasons

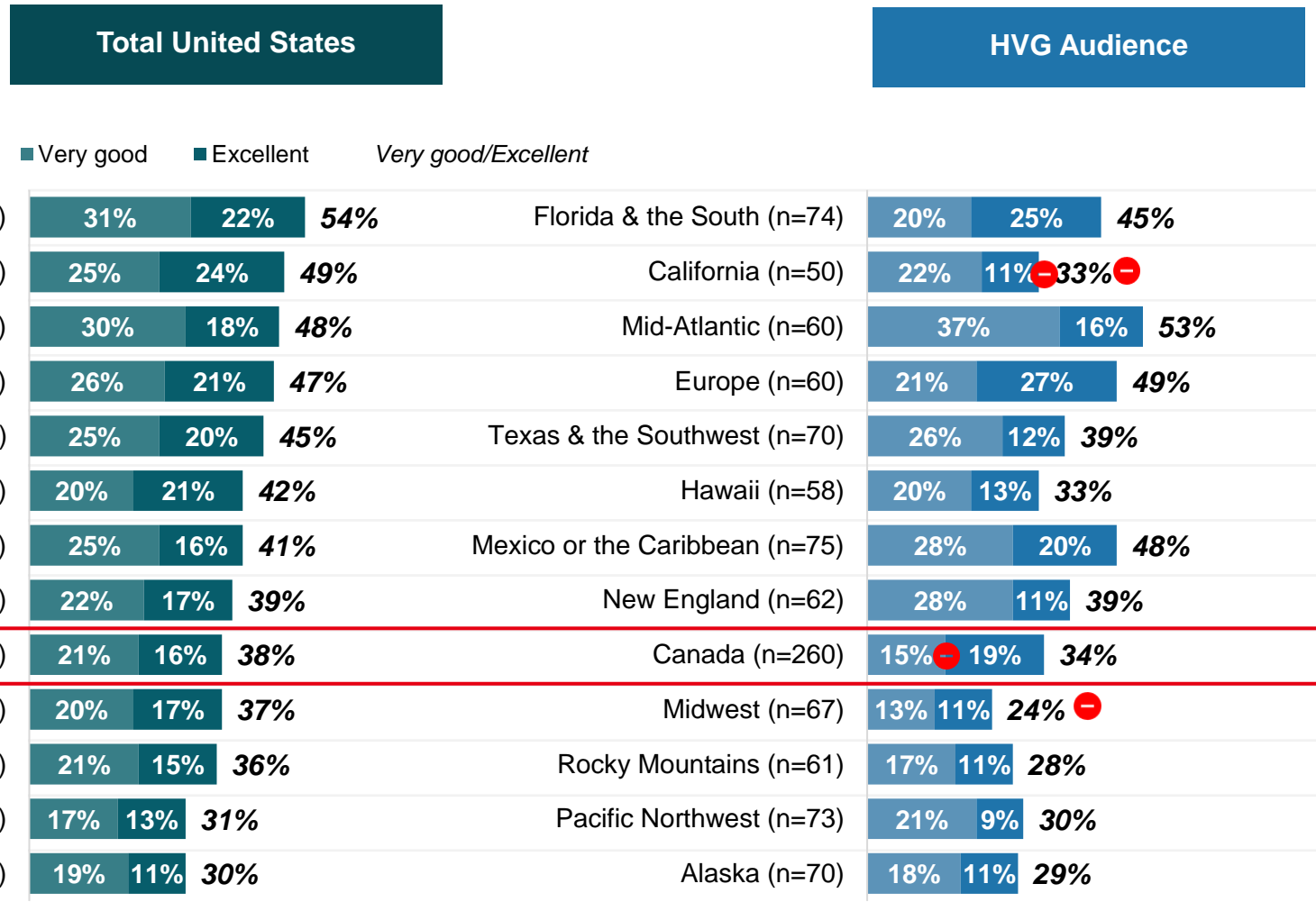


Total United States	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
New England (n=687)	29%	47%	55%	59%
Mid-Atlantic (n=732)	37%	55%	57%	52%
Florida & the South (n=789)	51%	59%	41%	50%
Midwest (n=547)	35%	55%	59%	50%
Rocky Mountains (n=725)	32%	49%	57%	50%
Texas & the Southwest (n=719)	48%	57%	37%	51%
Pacific Northwest (n=626)	28%	46%	58%	49%
California (n=723)	49%	52%	48%	46%
Alaska (n=683)	23%	38%	57%	41%
Hawaii (n=746)	48%	53%	45%	48%
Canada (n=2919)	27%	45%	61%	47%
Mexico or the Caribbean (n=728)	55%	57%	38%	48%
Europe (n=829)	30%	53%	56%	49%

HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
New England (n=38*)	23%	48%	52%	61%
Mid-Atlantic (n=37*)	29%	60%	46%	59%
Florida & the South (n=48*)	47%	61%	24% -	46%
Midwest (n=31*)	13%	55%	60%	24%
Rocky Mountains (n=39*)	25%	37%	60%	39%
Texas & the Southwest (n=45*)	42%	52%	30%	40%
Pacific Northwest (n=46*)	28%	47%	48%	42%
California (n=32*)	39%	56%	50%	55%
Alaska (n=50)	16%	26%	56%	41%
Hawaii (n=35*)	62%	40%	32%	55%
Canada (n=167)	22%	53%	62%	44%
Mexico or the Caribbean (n=51)	58%	61%	48%	51%
Europe (n=51)	29%	69% +	51%	52%

Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Those in the dream to purchase stages of the path to purchase for [DESTINATION] C7. For each of the following destinations, during which months would you consider taking a vacation trip in the next 2 years?
 *Small base size, interpret with caution (n<50)

Knowledge of Vacation Opportunities



Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C5. How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)



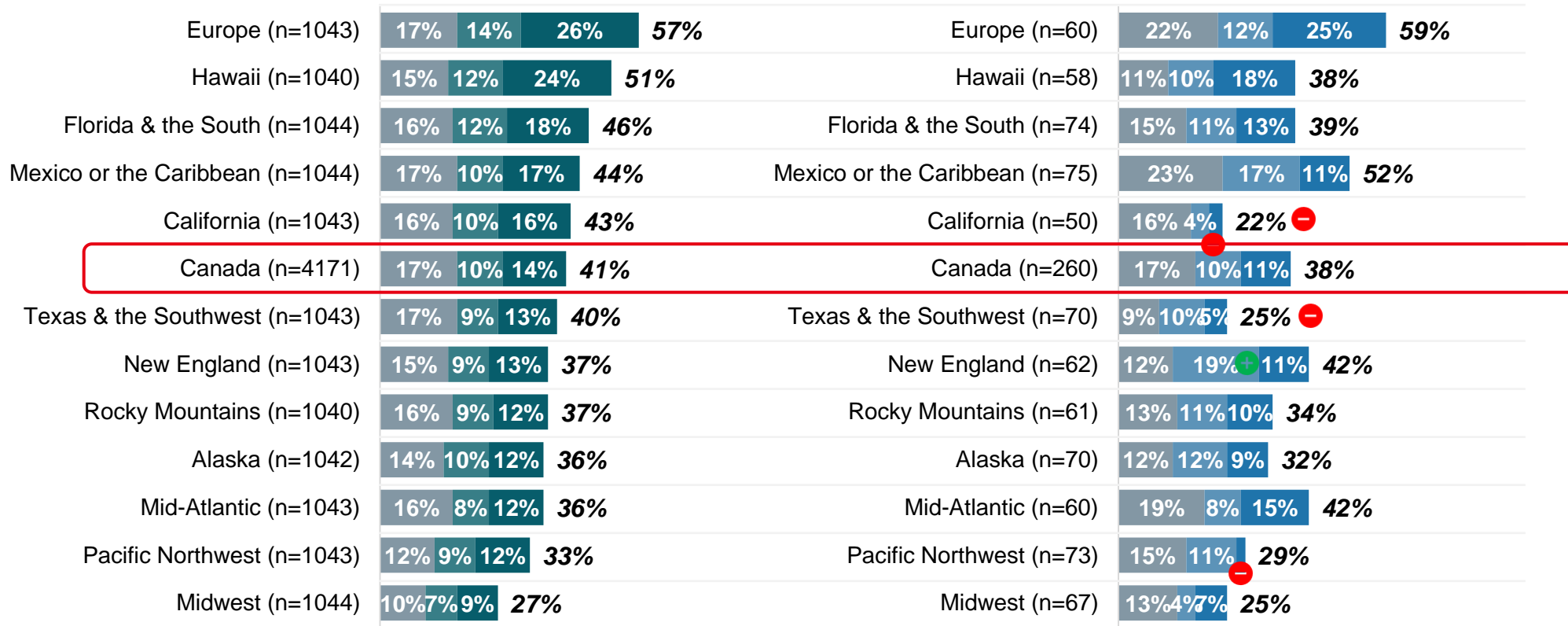
Destination Fit



Total United States

HVG Audience

■ 8 ■ 9 ■ 10 - Exactly what I'm looking for Top 3 box



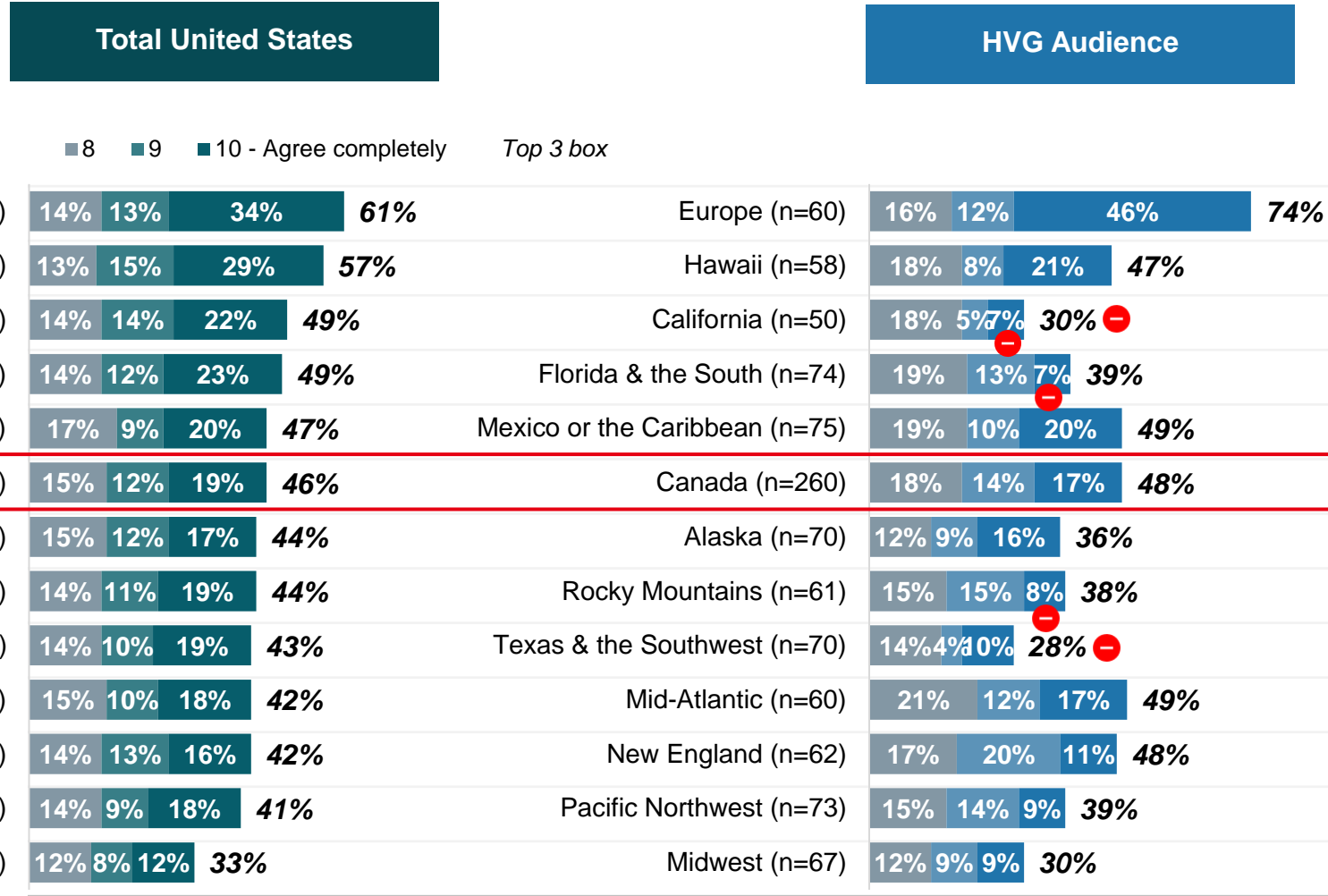
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 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C3. Please rate each destination in terms of what you are looking for in a vacation destination.

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+ / - = significantly higher/lower result (vs. Total)

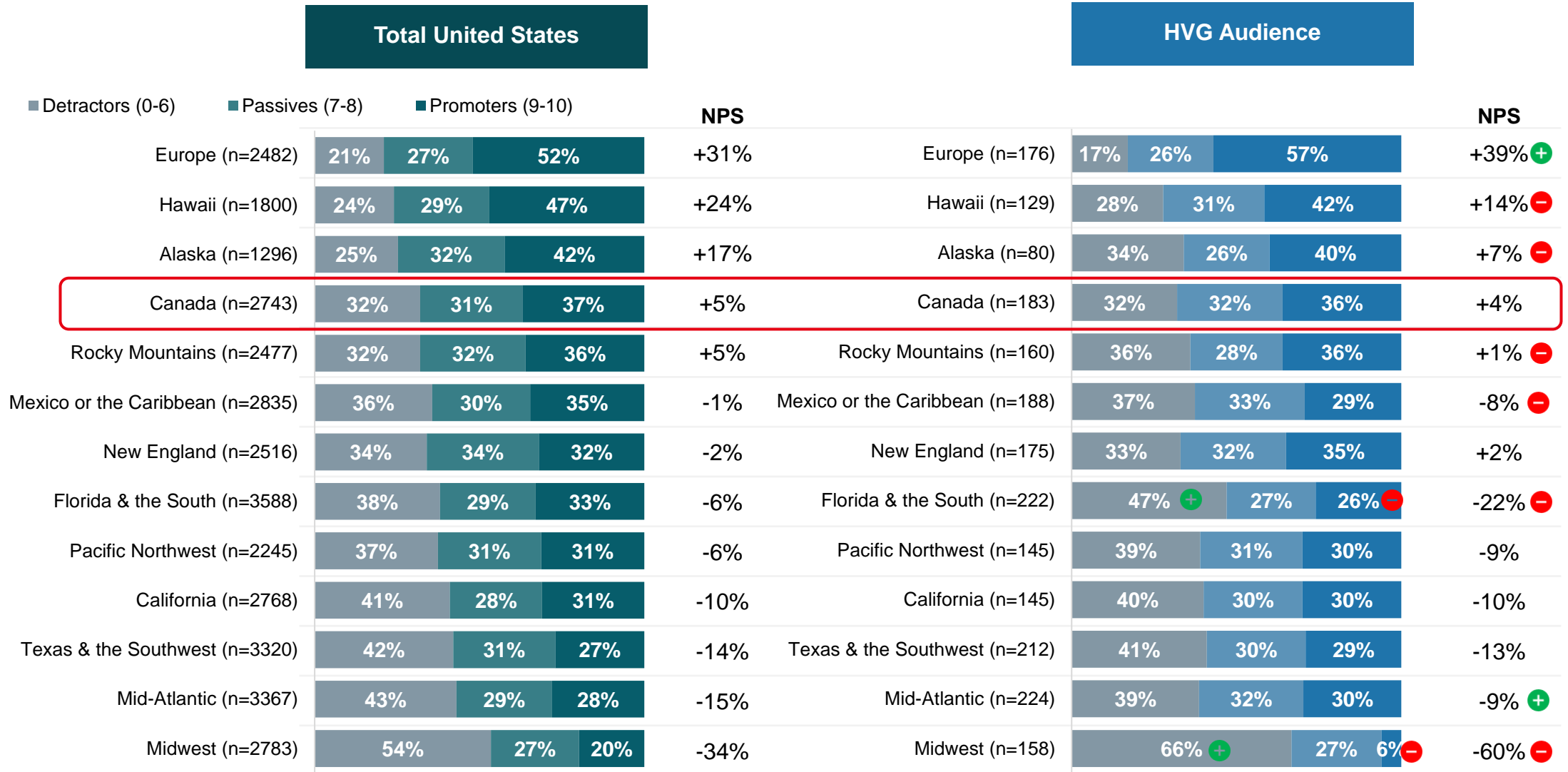
Destination Appeal



Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C4. Please indicate how much you agree or disagree with the following statement for each destination. "Is a destination that has a great deal of personal appeal to me"



Net Promoter Score (NPS)



Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
 C8. How likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

United States GTRP – December 2023

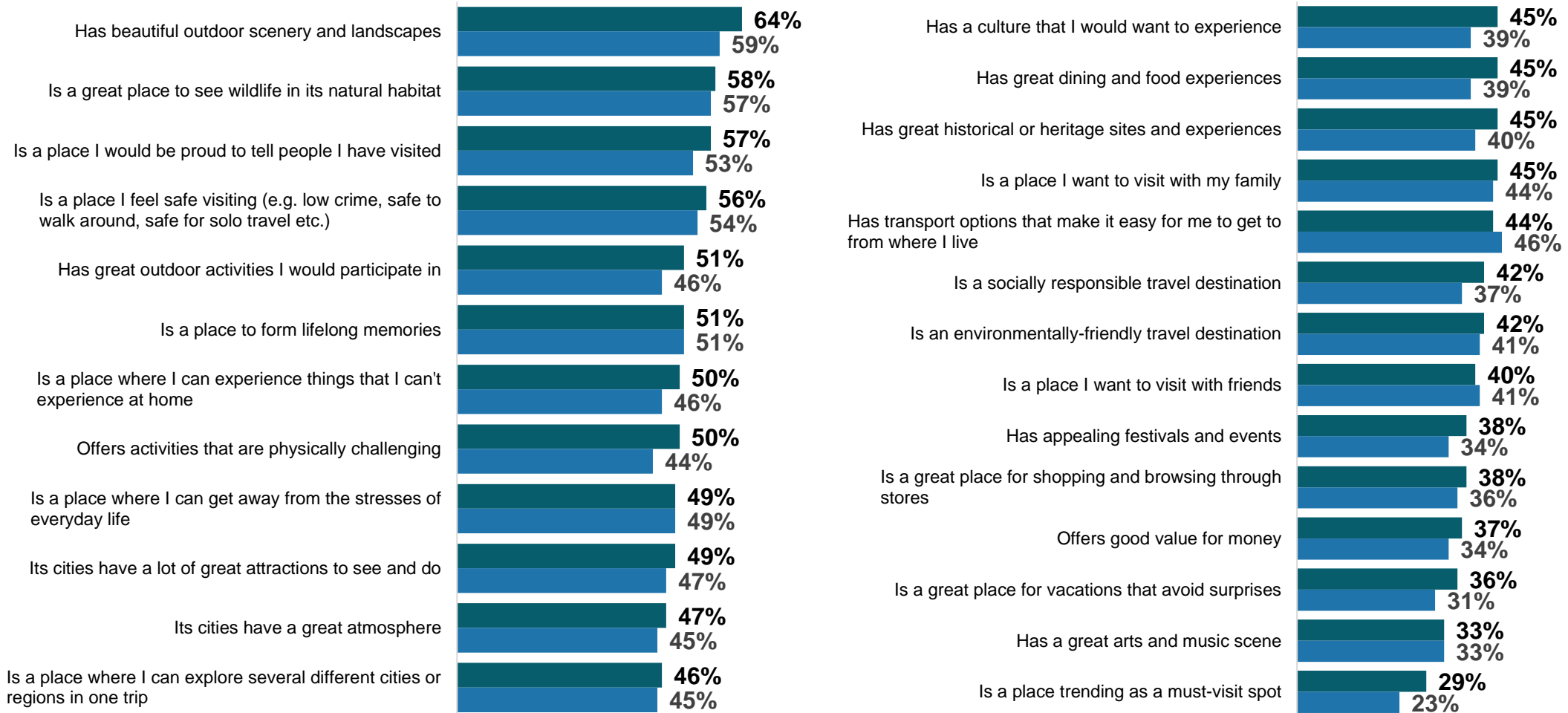


+ / - = significantly higher/lower result (vs. Total)

Impressions of Canada as a Vacation Destination



■ Total United States ■ HVG Audience



Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Destination Attributes – Relative Strengths & Weaknesses: Among Total United States



	n=	Canada	New England	Mid-Atlantic	Florida & the South	Midwest	Rocky Mountains	Texas & the Southwest	Pacific Northwest	California	Alaska	Hawaii	Mexico or the Caribbean	Europe
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness							Strength	Strength	Strength	
	Is a place to form lifelong memories													
	Is a place I would be proud to tell people I have visited										Strength			
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength											Weakness	
	Is a place where I can explore several different cities or regions in one trip			Strength							Weakness	Weakness	Strength	Strength
	Offers good value for money				Strength	Strength				Weakness		Weakness	Strength	
Type of Trip	Has transport options that make it easy for me to get to from where I live			Strength							Weakness	Weakness		
	Is a place I want to visit with friends													
	Is a place I want to visit with my family													
	Is a great place for vacation that avoid surprises					Strength								
	Is a place where I can experience things that I can't experience at home					Weakness					Strength		Strength	
	Is an environmentally-friendly travel destination													
To-Do	Is a socially responsible travel destination													
	Is a place trending as a must-visit spot													
	Offers activities that are physically challenging			Weakness			Strength				Strength			Weakness
	Is a great place for shopping and browsing through stores			Strength			Weakness			Strength	Weakness			
	Its cities have a lot of great attractions to see and do			Strength			Weakness				Weakness			
	Has great outdoor activities I would participate in			Weakness										Weakness
	Has great dining and food experiences			Strength			Weakness				Weakness			
Has a great arts and music scene	Weakness		Strength			Weakness			Strength	Weakness	Weakness		Strength	
To-See	Has appealing festivals and events			Weakness							Weakness			
	Its cities have a great atmosphere			Strength							Weakness			Strength
	Has beautiful outdoor scenery and landscapes			Weakness							Strength			
	Is a great place to see wildlife in its natural habitat			Weakness			Strength				Strength			Weakness
	Has great historical or heritage sites and experiences		Strength	Strength										
Has a culture that I would want to experience												Strength	Strength	

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 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
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 Select "None of these" if you think none of the destinations apply.

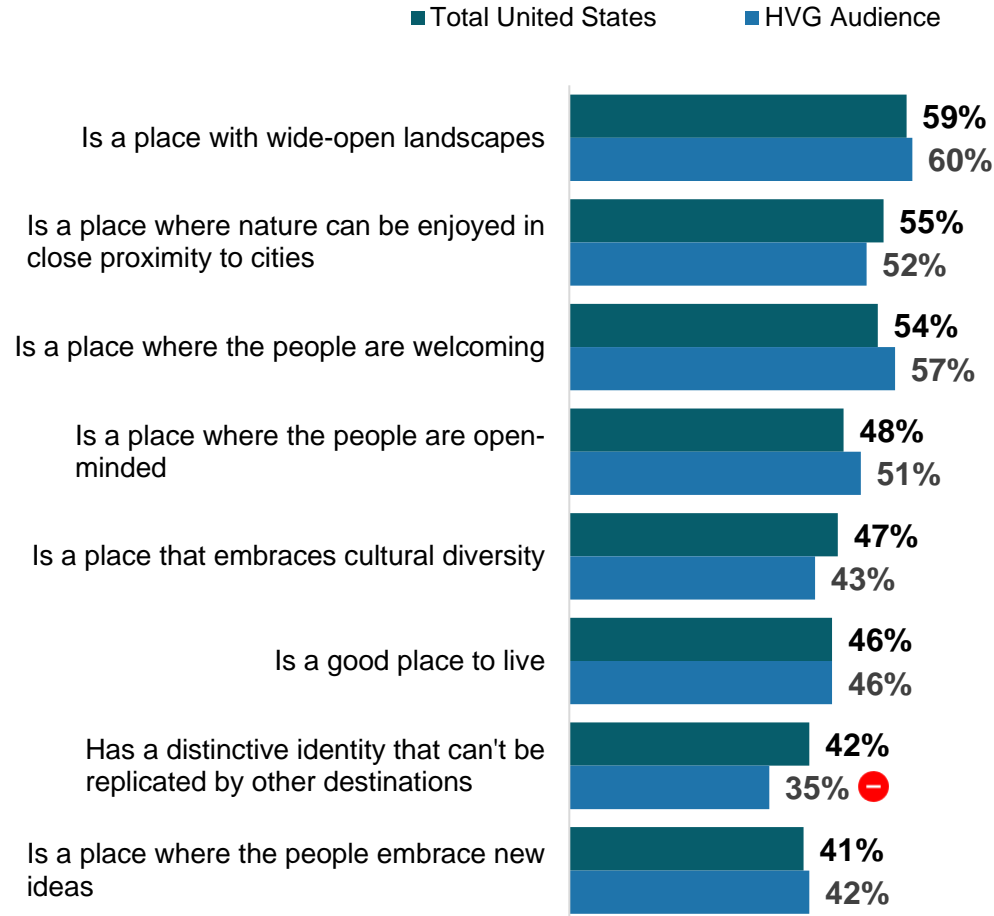
Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience



	n=	Canada	New England	Mid-Atlantic	Florida & the South	Midwest	Rocky Mountains	Texas & the Southwest	Pacific Northwest	California	Alaska	Hawaii	Mexico or the Caribbean	Europe
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness		Weakness	Strength			Weakness	Strength	Strength		
	Is a place to form lifelong memories					Weakness					Strength			
	Is a place I would be proud to tell people I have visited					Weakness						Strength		
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength	Strength							Weakness	Strength		Weakness	Weakness
	Is a place where I can explore several different cities or regions in one trip				Strength			Strength		Weakness	Weakness	Weakness	Strength	
	Offers good value for money				Strength		Weakness	Strength		Weakness		Weakness	Strength	
Type of Trip	Has transport options that make it easy for me to get to from where I live		Strength	Strength			Weakness		Weakness			Weakness		
	Is a place I want to visit with friends										Weakness			
	Is a place I want to visit with my family													
	Is a great place for vacation that avoid surprises			Strength		Strength								Weakness
	Is a place where I can experience things that I can't experience at home		Weakness	Weakness				Weakness			Strength	Strength	Strength	Strength
	Is an environmentally-friendly travel destination		Strength					Weakness						Weakness
To-Do	Is a socially responsible travel destination		Strength								Strength			Weakness
	Is a place trending as a must-visit spot			Strength						Weakness				Strength
	Offers activities that are physically challenging		Weakness	Weakness		Strength	Strength				Strength			Weakness
	Is a great place for shopping and browsing through stores			Strength			Weakness			Strength	Weakness	Weakness		Strength
	Its cities have a lot of great attractions to see and do						Weakness			Strength	Weakness			Strength
	Has great outdoor activities I would participate in										Strength	Strength		Weakness
	Has great dining and food experiences	Weakness		Strength				Weakness		Strength	Weakness			Strength
To-See	Has a great arts and music scene			Strength						Strength		Weakness		Strength
	Has appealing festivals and events			Strength			Weakness		Weakness		Weakness			Strength
	Its cities have a great atmosphere						Weakness				Weakness			
	Has beautiful outdoor scenery and landscapes			Weakness		Weakness	Strength				Strength			
	Is a great place to see wildlife in its natural habitat	Strength		Weakness			Strength		Strength		Strength		Weakness	Weakness
Has great historical or heritage sites and experiences		Strength						Weakness					Strength	
Has a culture that I would want to experience							Weakness			Weakness		Strength	Strength	

Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
 Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah | Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
 New England = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
 Rocky Mountains = e.g. Colorado, Idaho, Montana, Wyoming | Pacific Northwest e.g. Washington, Oregon
 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.

Brand Value Statements for Canada



Brand Value Statements: Among Total United States



	Canada	New England	Mid-Atlantic	Florida & the South	Midwest	Rocky Mountains	Texas & the Southwest	Pacific Northwest	California	Alaska	Hawaii	Mexico or the Caribbean	Europe
n=	4171	1043	1043	1044	1044	1040	1044	1043	1043	1042	1040	1044	1043
Is a place with wide-open landscapes		Weakness	Weakness	Weakness		Strength	Strength			Strength			Weakness
Is a place where nature can be enjoyed in close proximity to cities													Weakness
Is a place that embraces cultural diversity						Weakness			Strength				
Is a place where the people are welcoming			Weakness		Strength								
Is a place where the people are open-minded									Strength				
Is a place where the people embrace new ideas			Strength						Strength				
Is a good place to live					Strength				Weakness	Weakness		Weakness	
Has a distinctive identity that can't be replicated by other destinations					Weakness					Strength	Strength		

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.

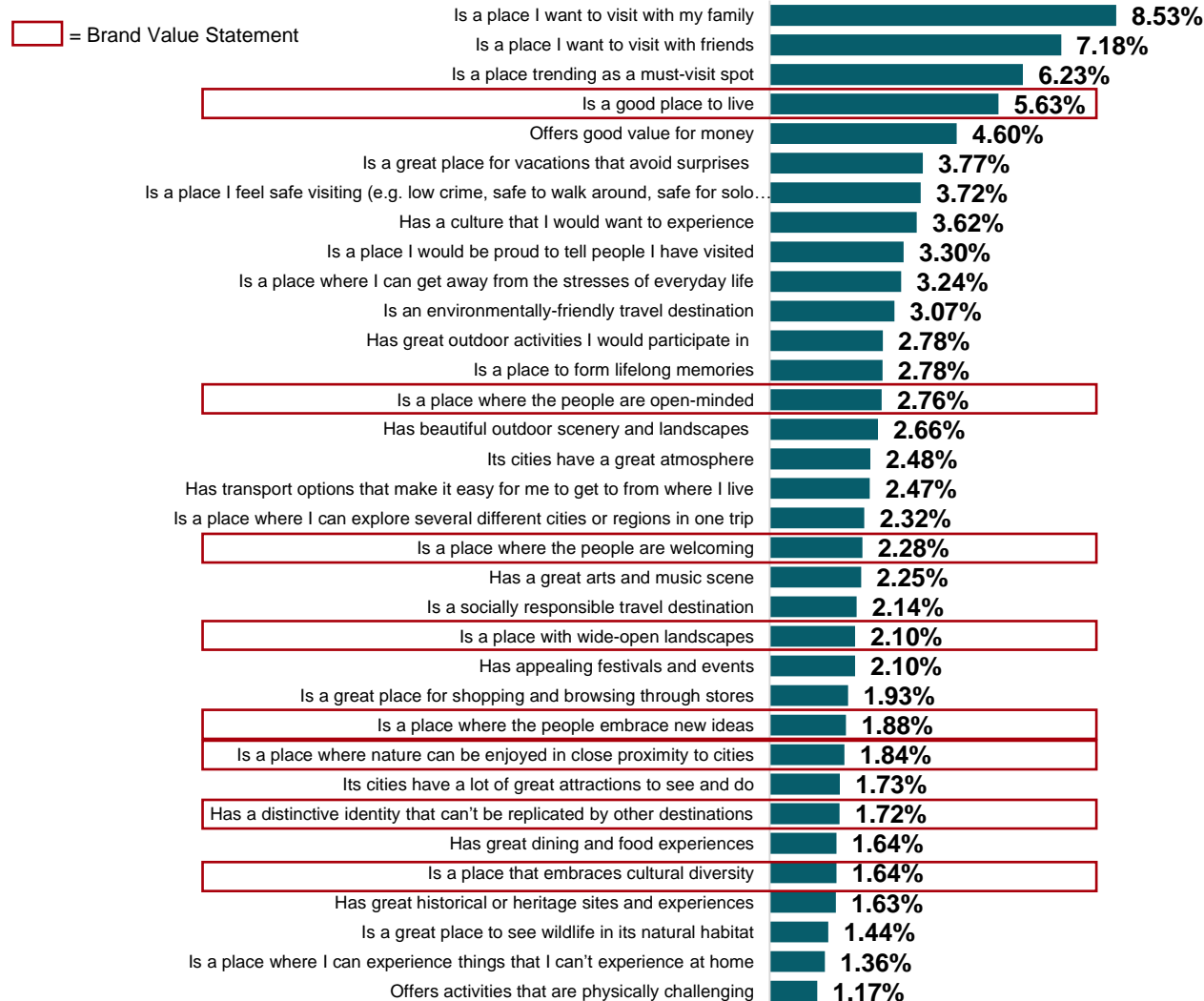
Brand Value Statements: Among HVG Audience



	Canada	New England	Mid-Atlantic	Florida & the South	Midwest	Rocky Mountains	Texas & the Southwest	Pacific Northwest	California	Alaska	Hawaii	Mexico or the Caribbean	Europe
n=	260	62	60	74	67	61	70	73	50	70	58	75	60
Is a place with wide-open landscapes	Strength	Weakness	Weakness		Strength	Strength			Weakness	Strength		Weakness	Weakness
Is a place where nature can be enjoyed in close proximity to cities													
Is a place that embraces cultural diversity			Strength	Weakness		Weakness		Strength	Strength	Weakness			
Is a place where the people are welcoming	Strength								Weakness		Strength		
Is a place where the people are open-minded	Strength						Weakness	Strength	Strength				
Is a place where the people embrace new ideas									Strength	Weakness			
Is a good place to live		Strength					Strength		Weakness	Weakness		Weakness	
Has a distinctive identity that can't be replicated by other destinations	Weakness							Weakness		Strength	Strength		Strength

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Out of state pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.

Destination Attributes: Drivers Analysis: Among Total United States



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

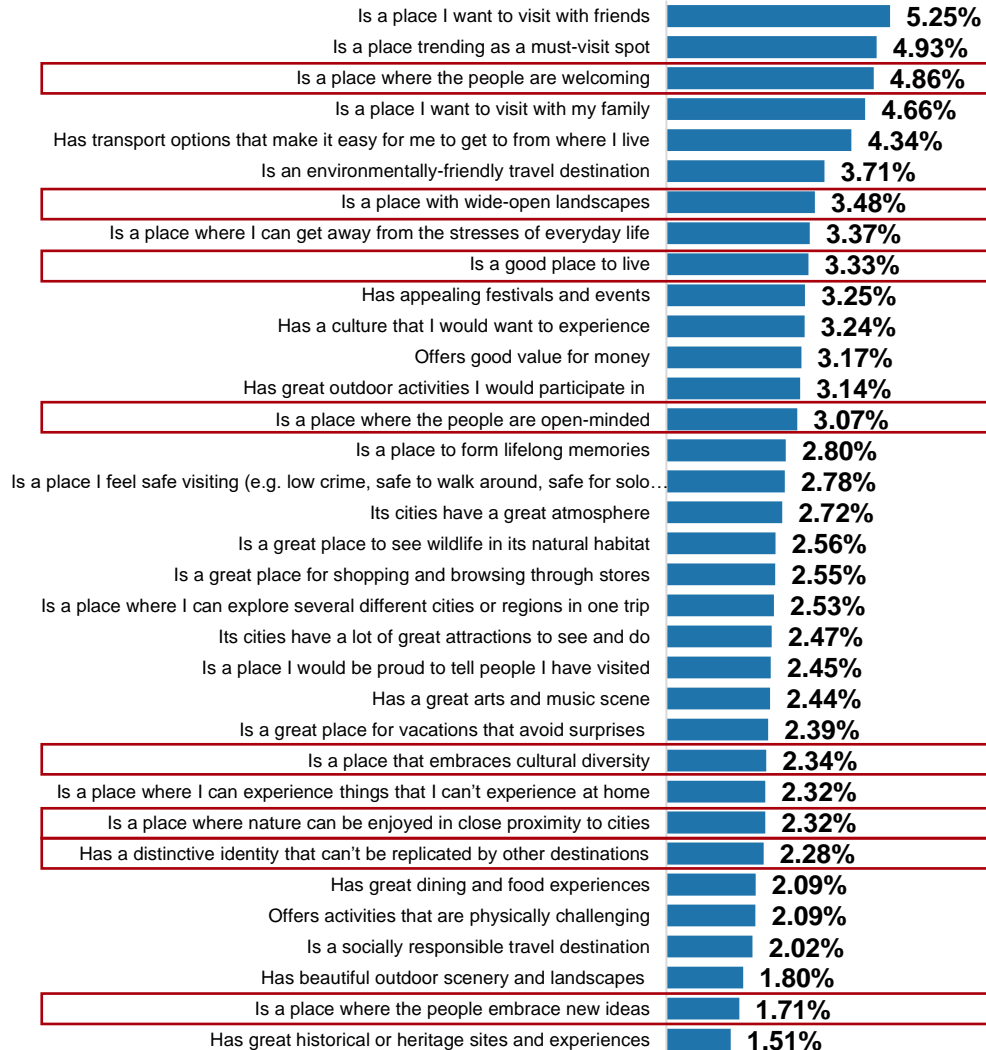
Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.



Destination Attributes: Drivers Analysis: Among HVG Audience



= Brand Value Statement



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.





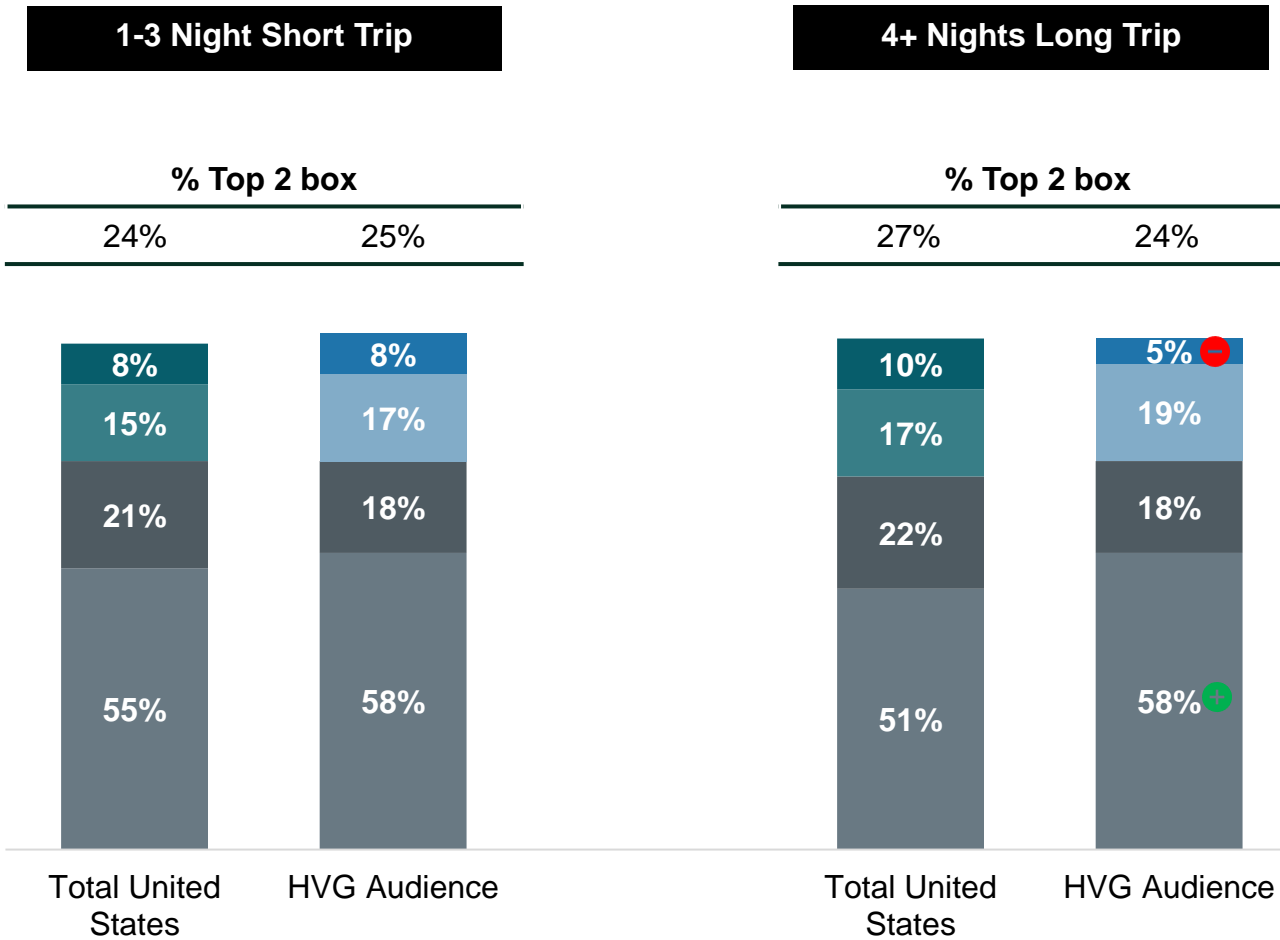
Travel Intentions to Canada



Toronto
Ontario



Likelihood to Take a Vacation Trip to Canada (Next 2 Years)

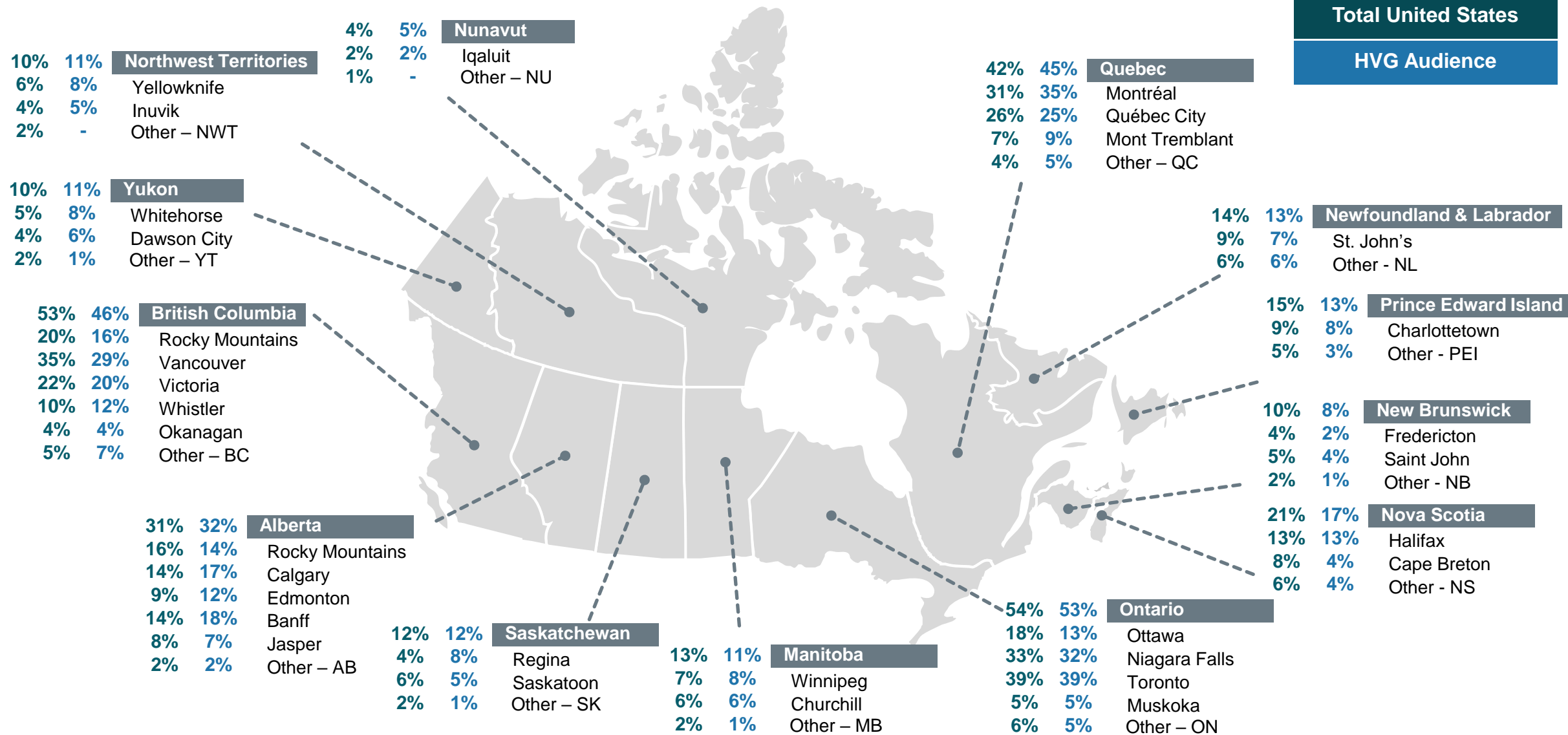


**NET: Definitely/
Very Likely to
visit Canada in
the next 2 years**

**Total: 36%
HVG: 36%**

39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
E1. Realistically, how likely are you to take a vacation trip to Canada in the next 2 years? (Select one)

Canadian Destinations Likely to Visit



Total United States
HVG Audience

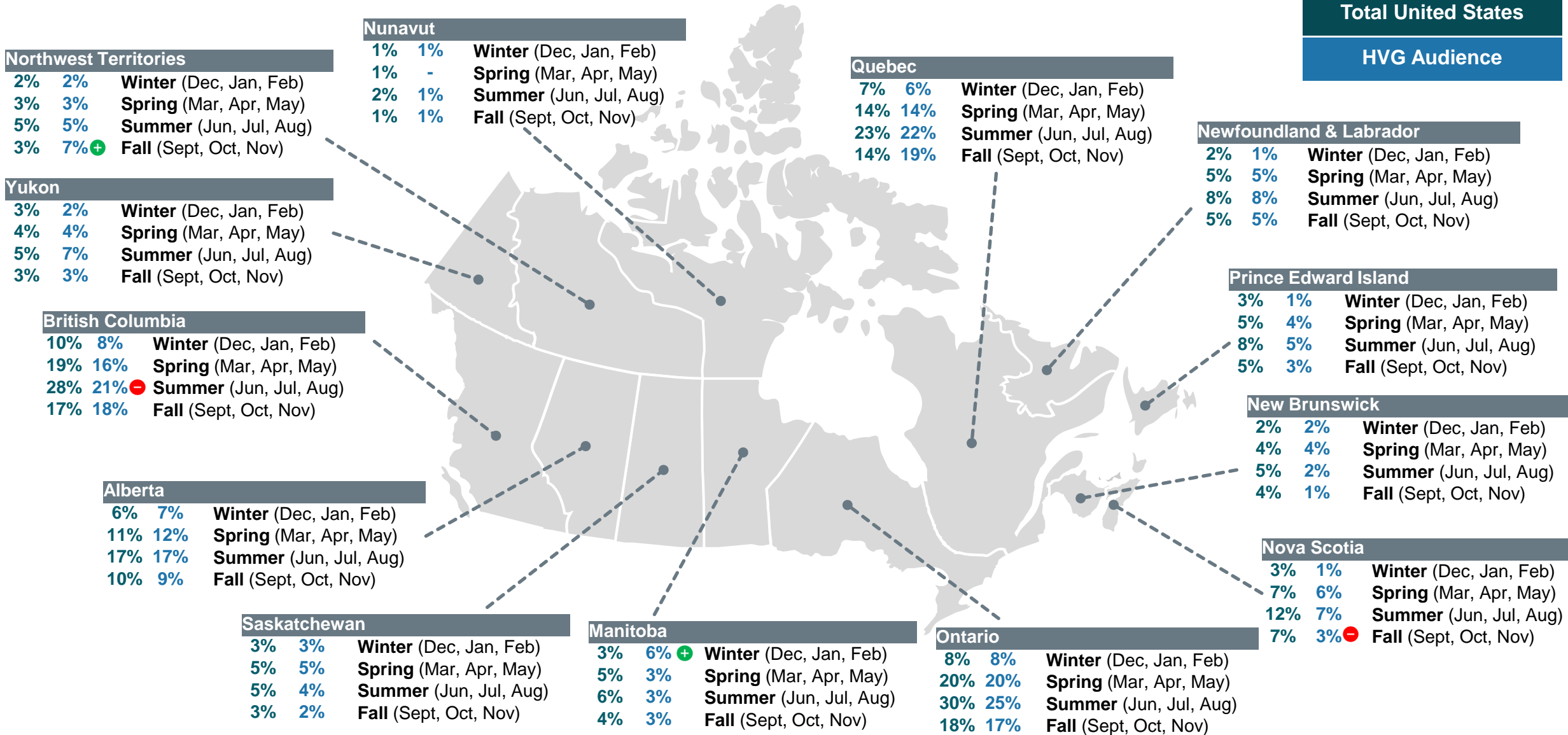


Time of Year Interested in Visiting Canada (Next 2 Years)

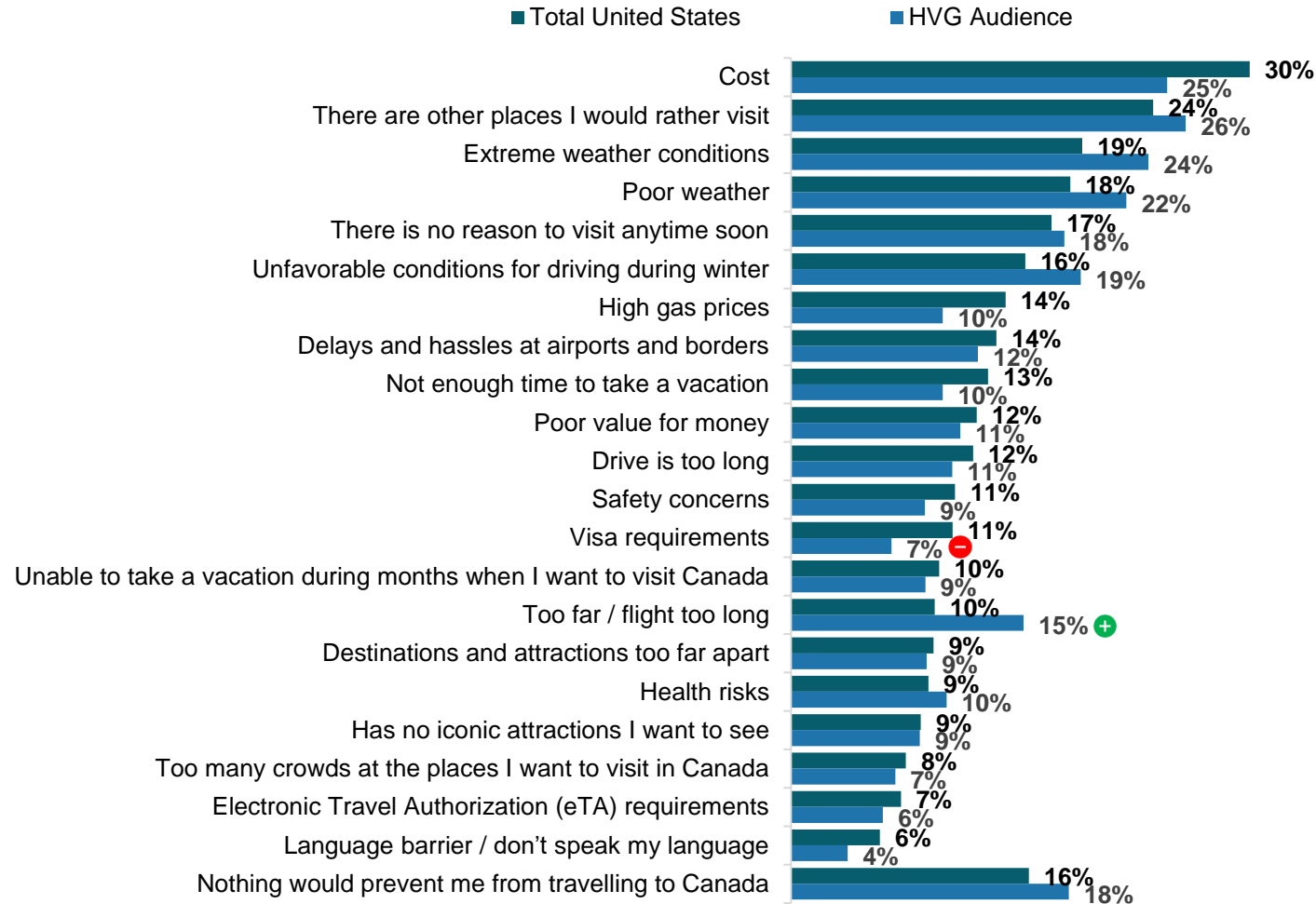


Total United States

HVG Audience



Barriers for Visiting Canada





Travel Behaviours



 Churchill
Manitoba



Top 10 Activities Interested In & Trip Anchors

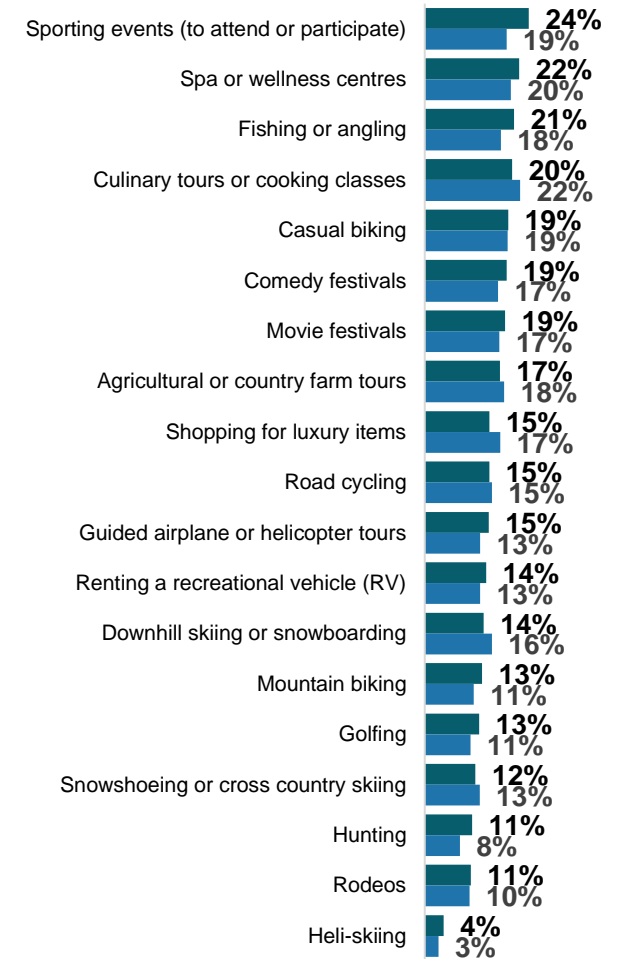
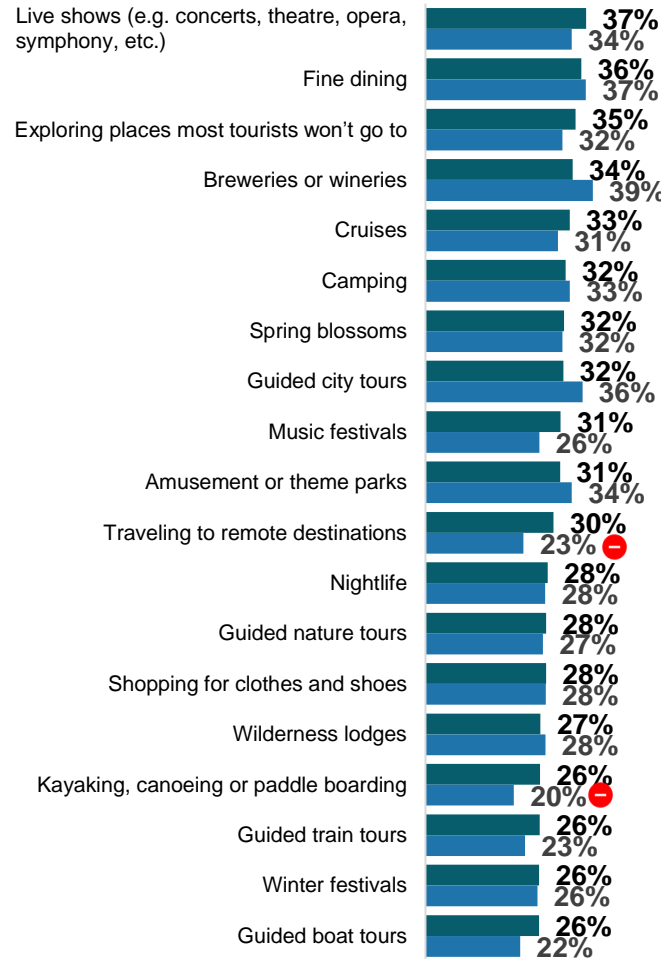
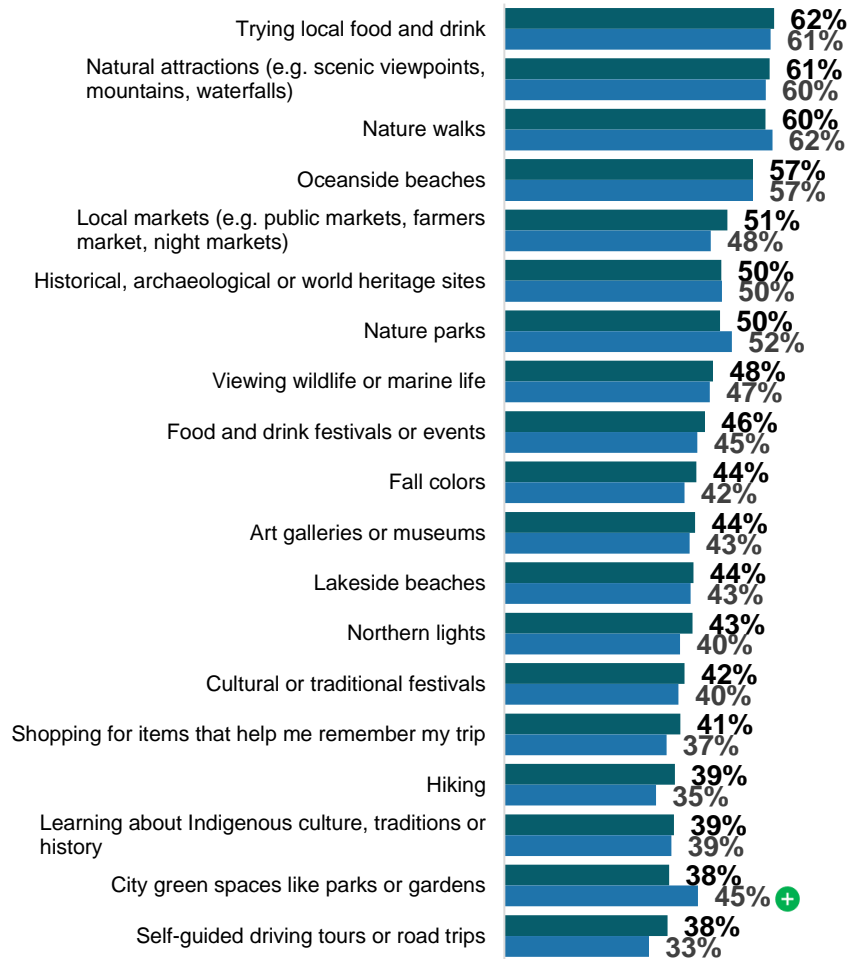
Top 10 General Activities Interested In	
Total United States (n=4171)	HVG Audience (n=260)
Trying local food and drink	Nature walks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Trying local food and drink
Nature walks	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Oceanside beaches	Oceanside beaches
Local markets (e.g. public markets, farmers market, night markets)	Nature parks
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Nature parks	Local markets (e.g. public markets, farmers market, night markets)
Viewing wildlife or marine life	Viewing wildlife or marine life
Food and drink festivals or events	City green spaces like parks or gardens +
Fall colors	Food and drink festivals or events

Top 10 Trip Anchor Activities	
Total United States (n=4124)	HVG Audience (n=257)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Oceanside beaches
Oceanside beaches	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Northern lights	Nature walks
Trying local food and drink	Trying local food and drink
Cruises	Lakeside beaches
Viewing wildlife or marine life	Nature parks
Nature walks	Food and drink festivals or events
Fall colors	Northern lights
Nature parks	Amusement or theme parks



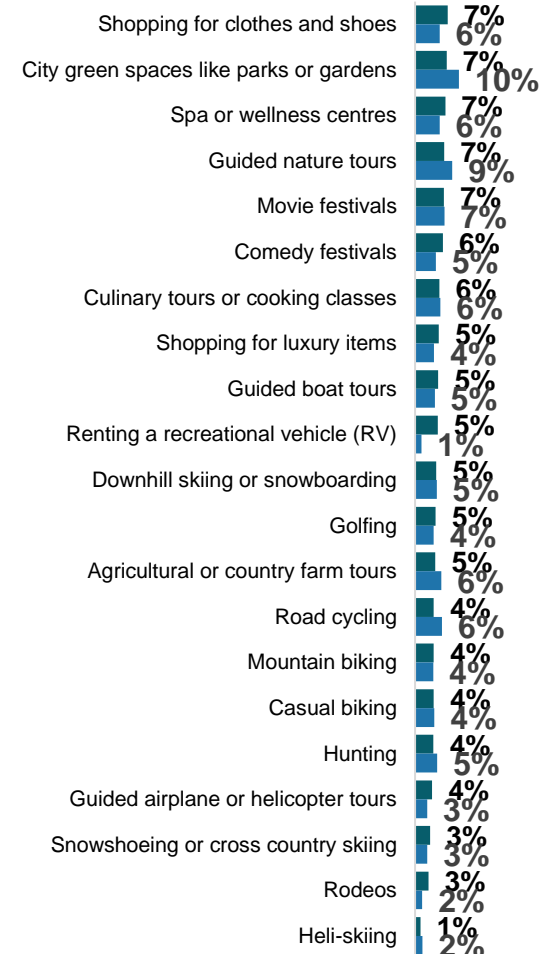
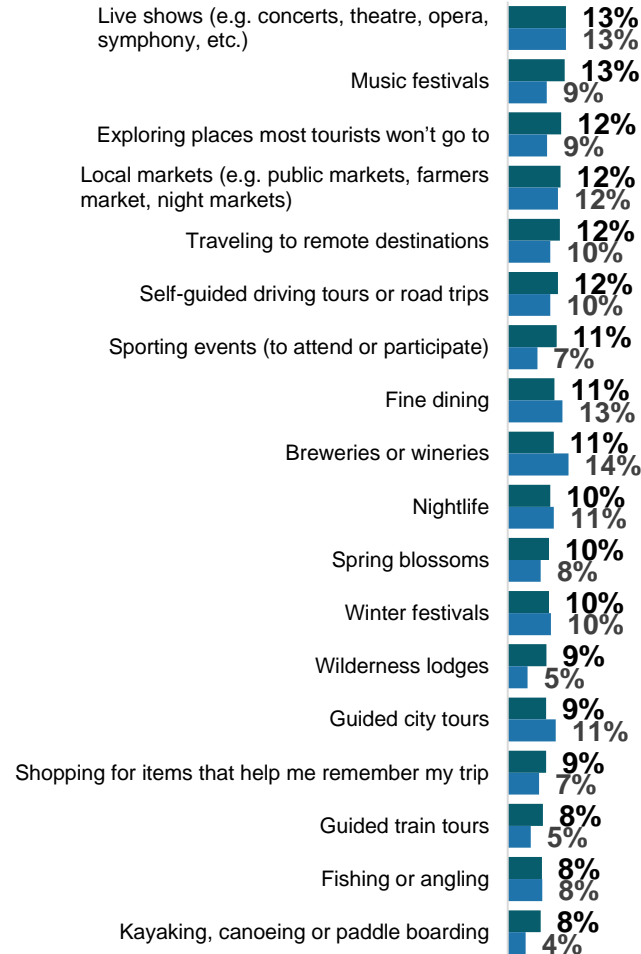
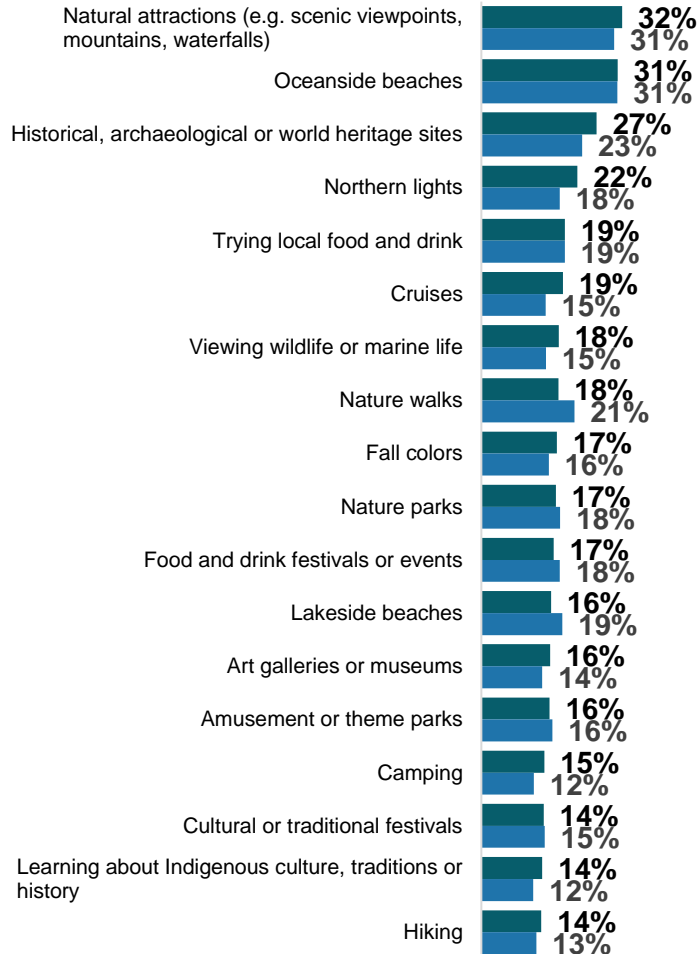
General Activities Interested In

■ Total United States ■ HVG Audience

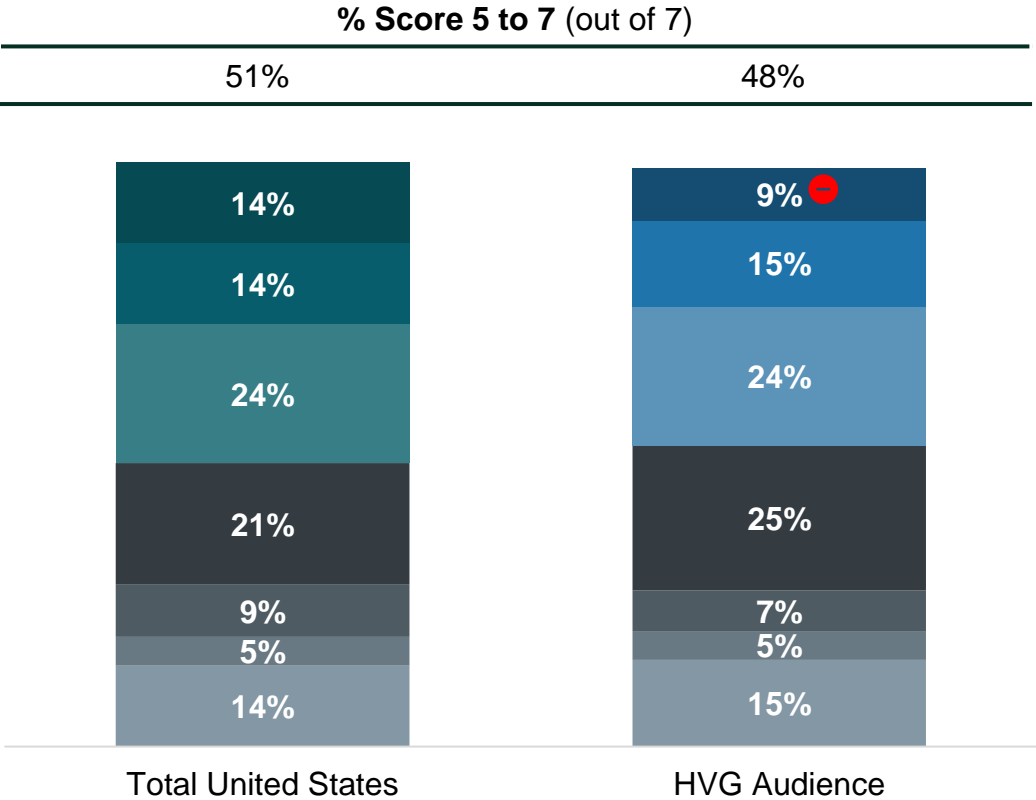


Trip Anchor Activities

■ Total United States ■ HVG Audience



Priority of Sustainable Travel When Planning a Trip



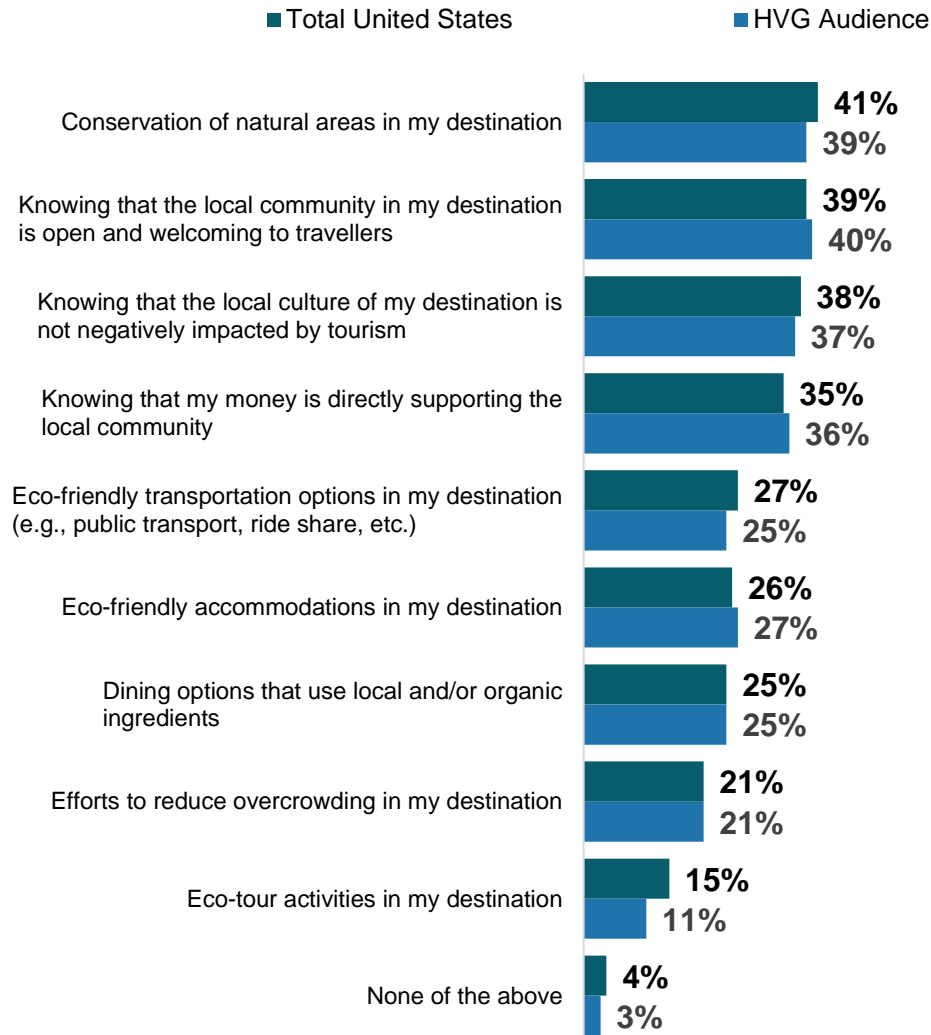
- 7 - Essential priority
- 6
- 5
- 4
- 3
- 2
- 1 - Not a priority

Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

47 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
 D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.

Top 3 Most Important Sustainability Efforts

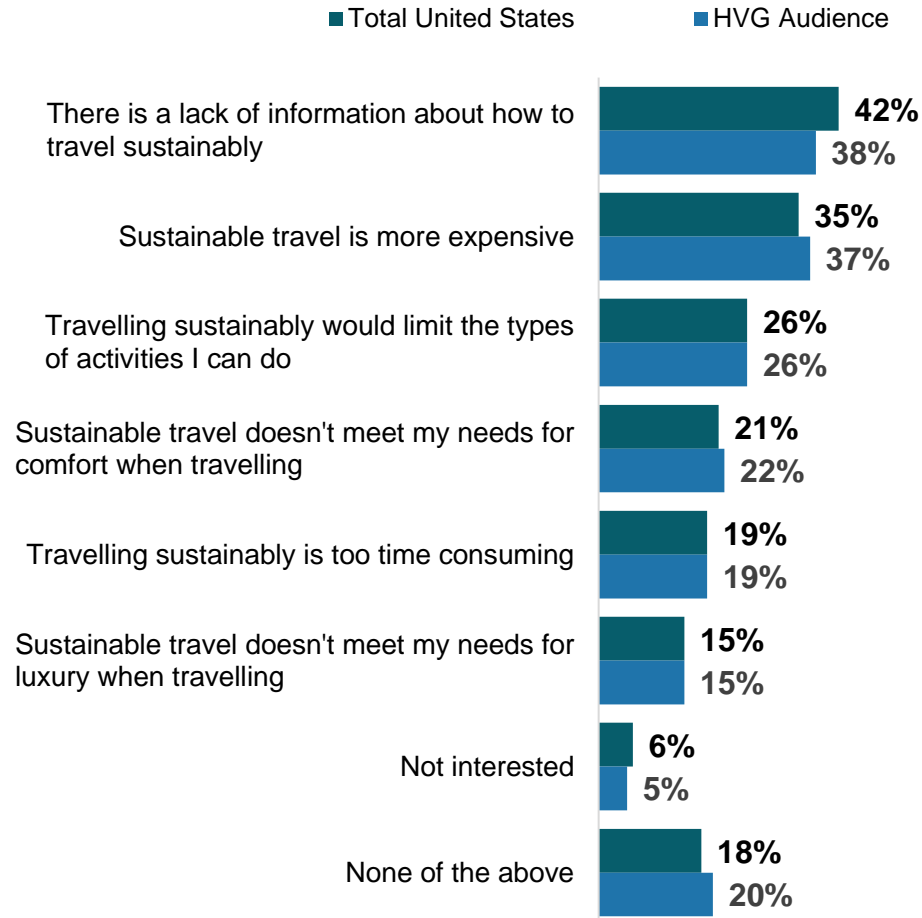


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Barriers to Sustainable Travel

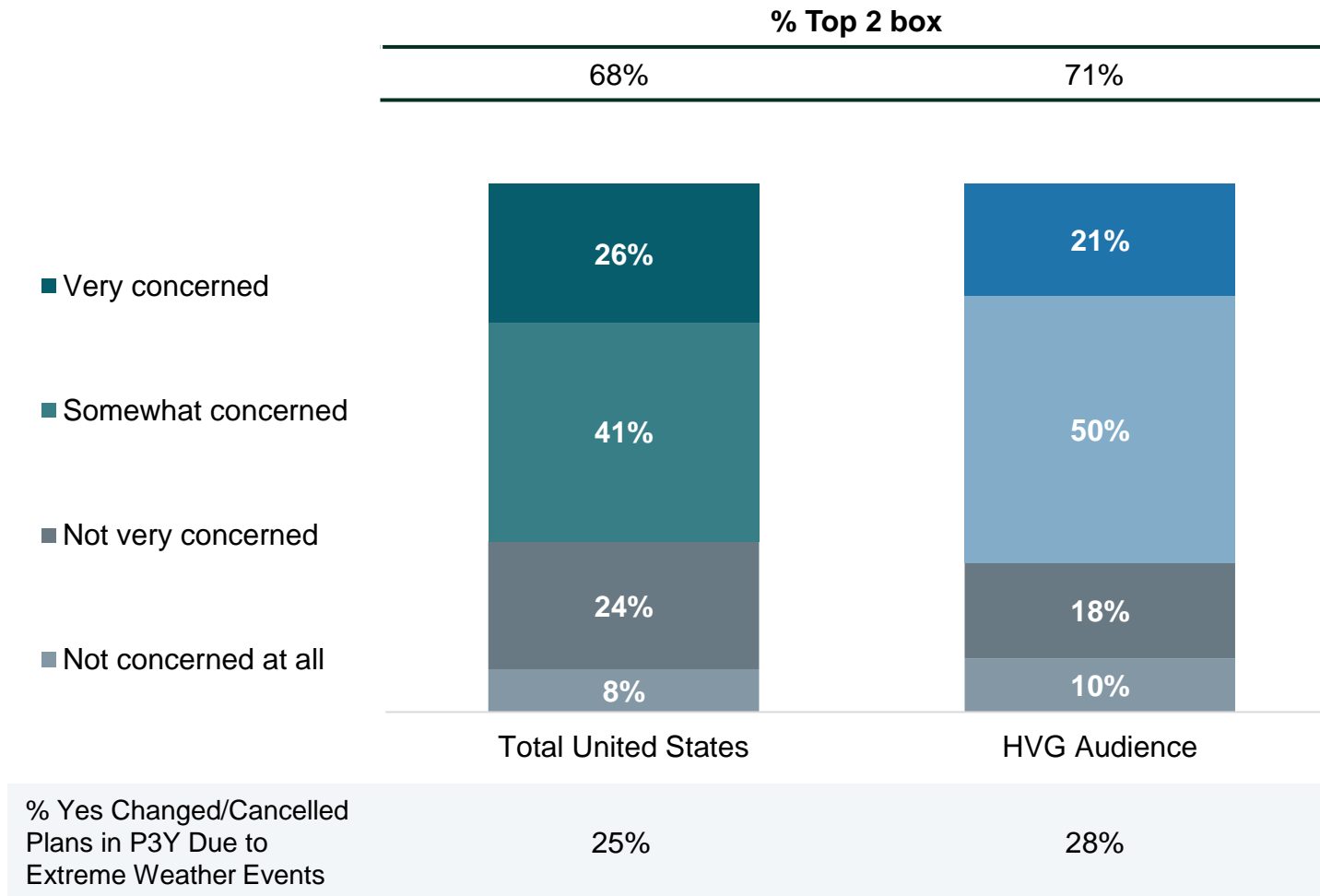


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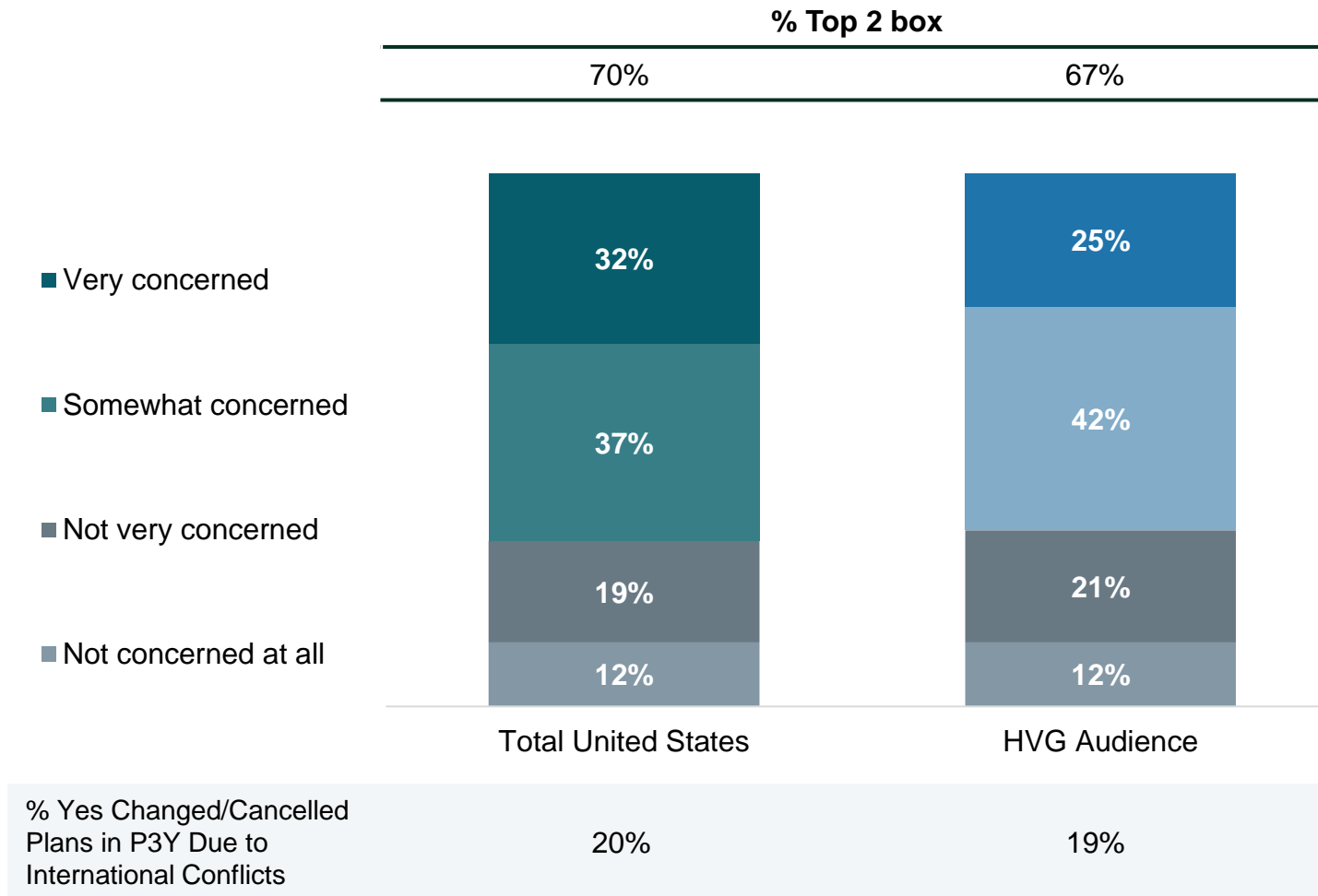
Impact of Extreme Weather Events on Travel Plans



Extreme Weather Events Description

As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

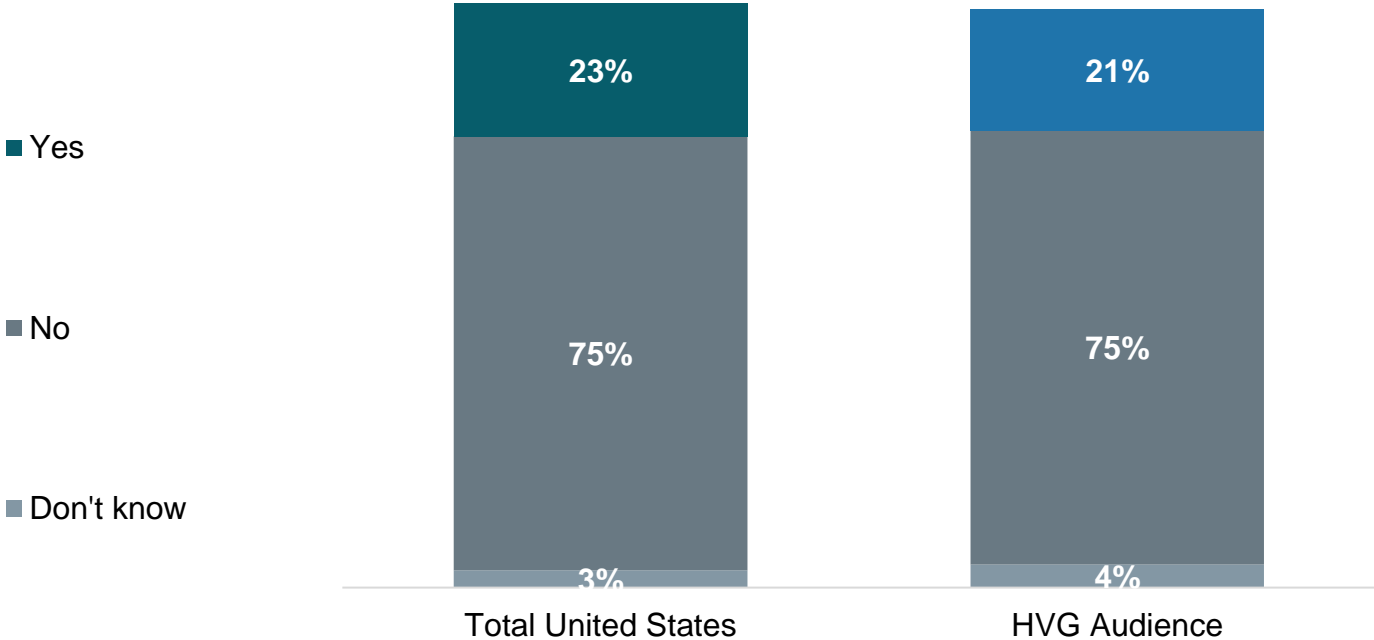
Impact of International Conflicts & Unrest on Travel Plans



International Conflicts Description

As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.

Usage of AI Tools to Plan Trips





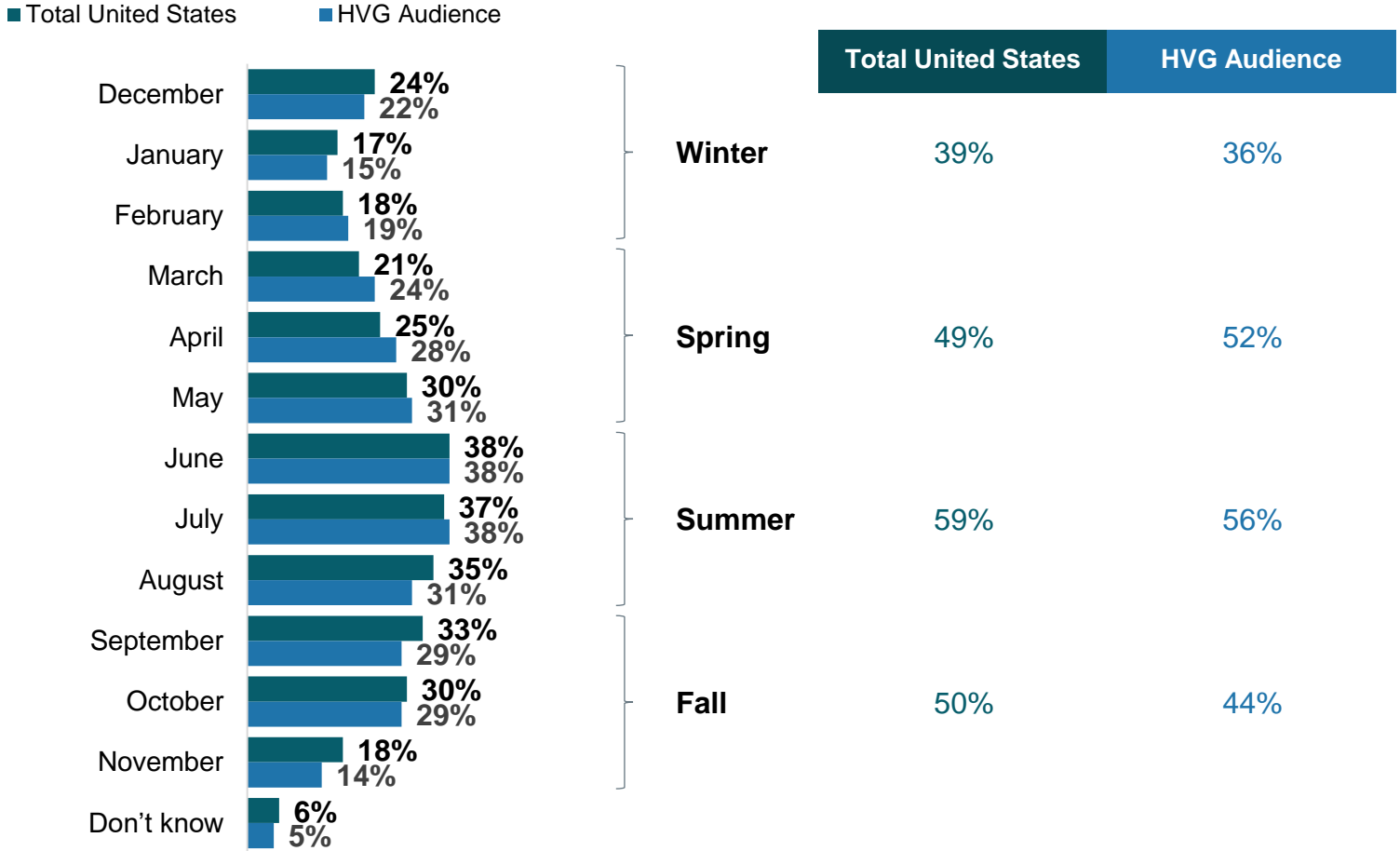
Seasonal Travel



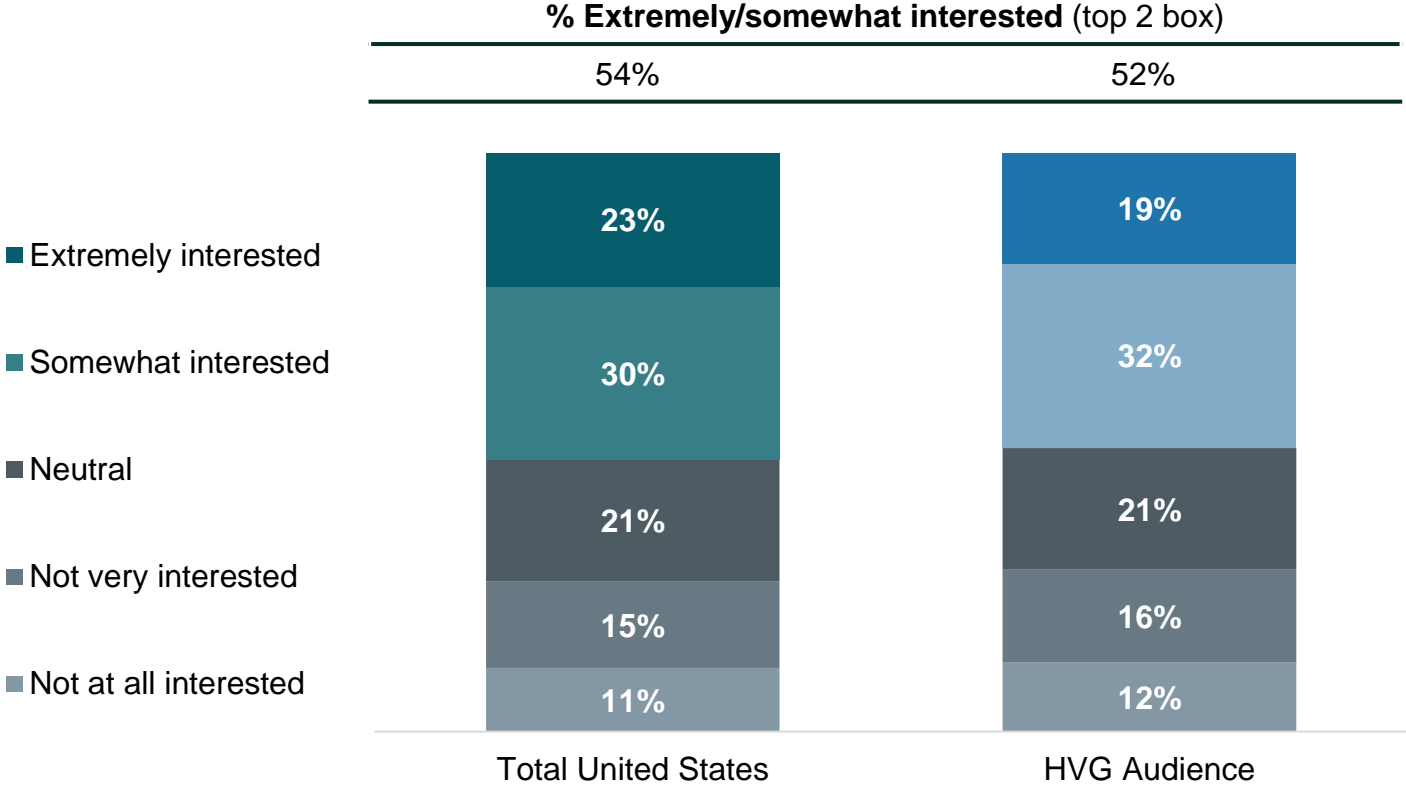
Yellowknife
Northwest Territories



Preferred Time of Year for Vacation Trips



Interest in Winter Vacations

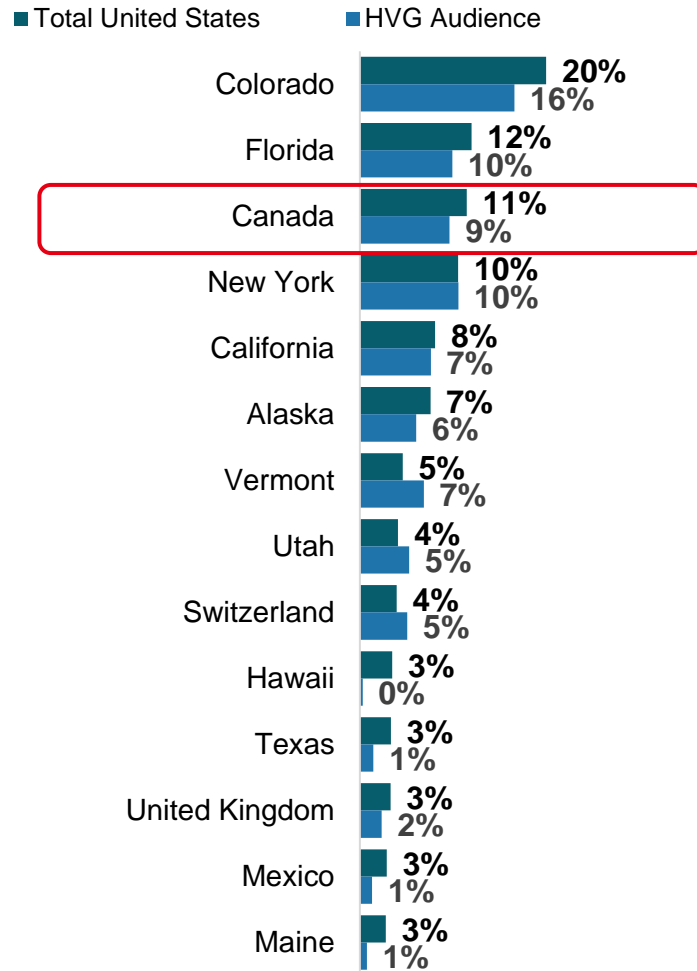


Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.

55 Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=2116); HVG (n=138)
 D2. In general, how interested are you in taking a vacation trip to a destination during its winter season?

Unaided Winter Destinations



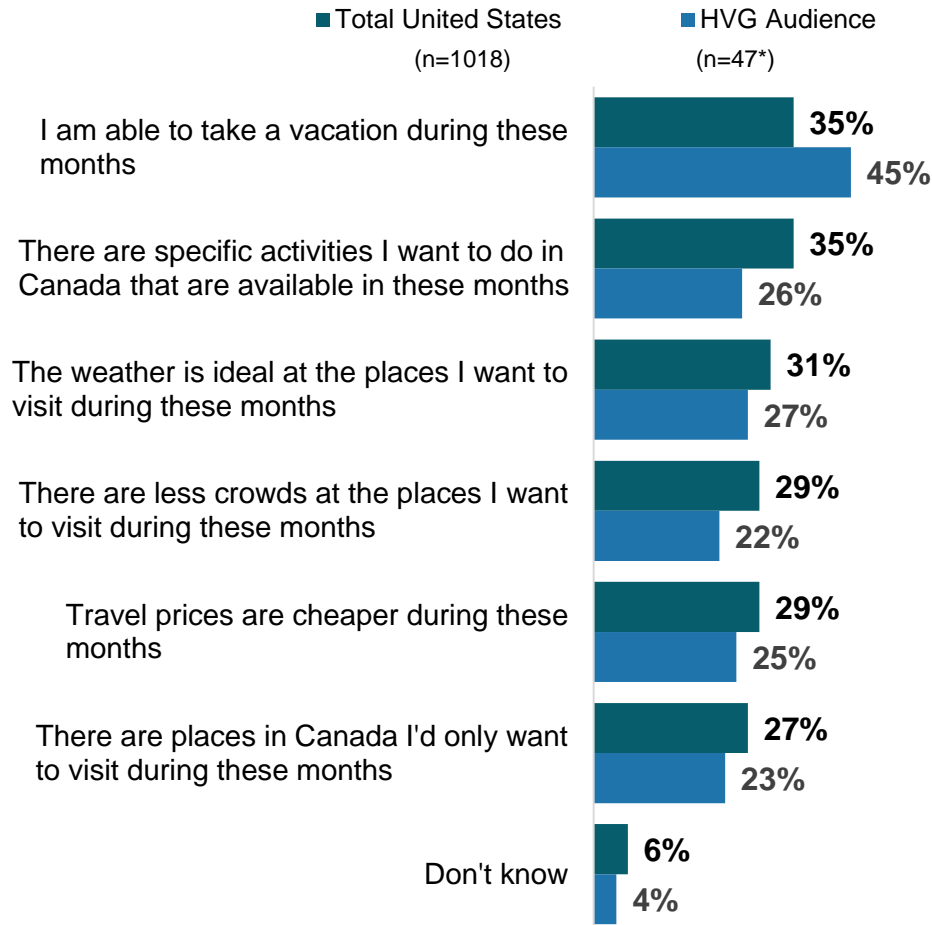
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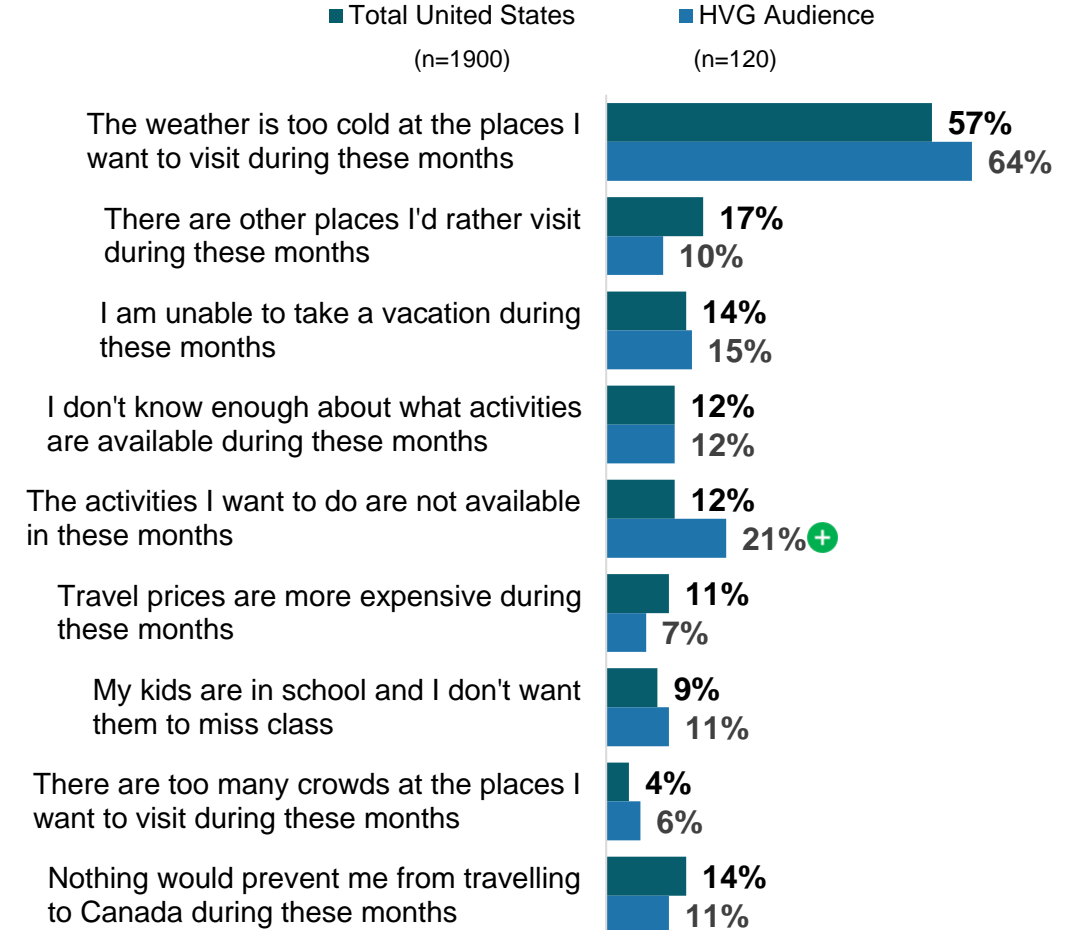
Motivators & Barriers for Winter Travel to Canada



Motivators for Winter Travel



Barriers for Winter Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February E8a. You indicated earlier that you are considering taking a vacation to **Canada** during the months of December, January and/or February... Which of the following describes why you would be interested in travelling to Canada for a vacation during these **winter months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a vacation to **Canada** during the months of December, January and/or February... Which of the following describes why you would **not** be interested in travelling to Canada for a vacation during these **winter months**?

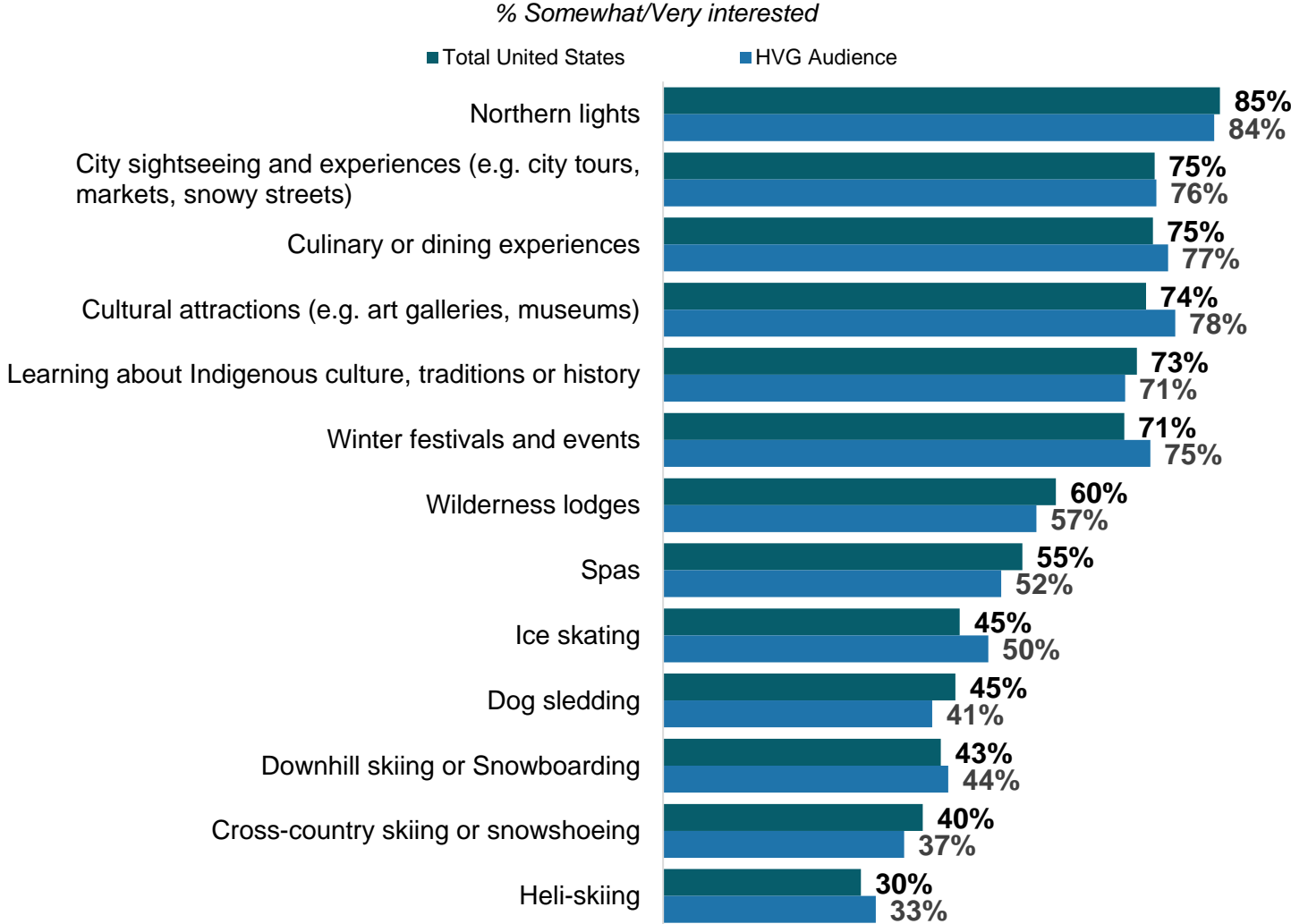
*Small base size, interpret with caution (n<50)

United States GTRP – December 2023

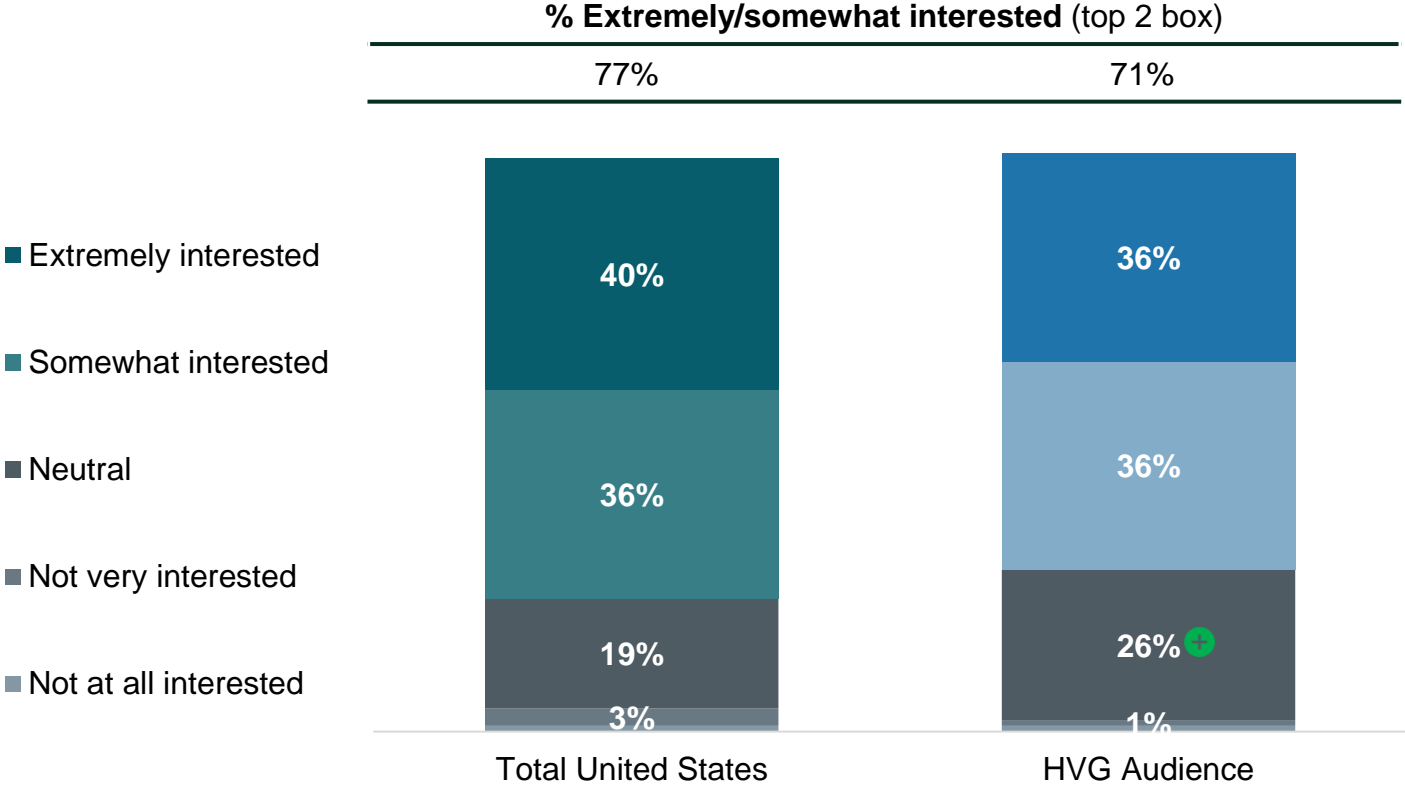


+ / - = significantly higher/lower result (vs. Total)

Interest in Winter Activities in Canada



Interest in Fall Vacations

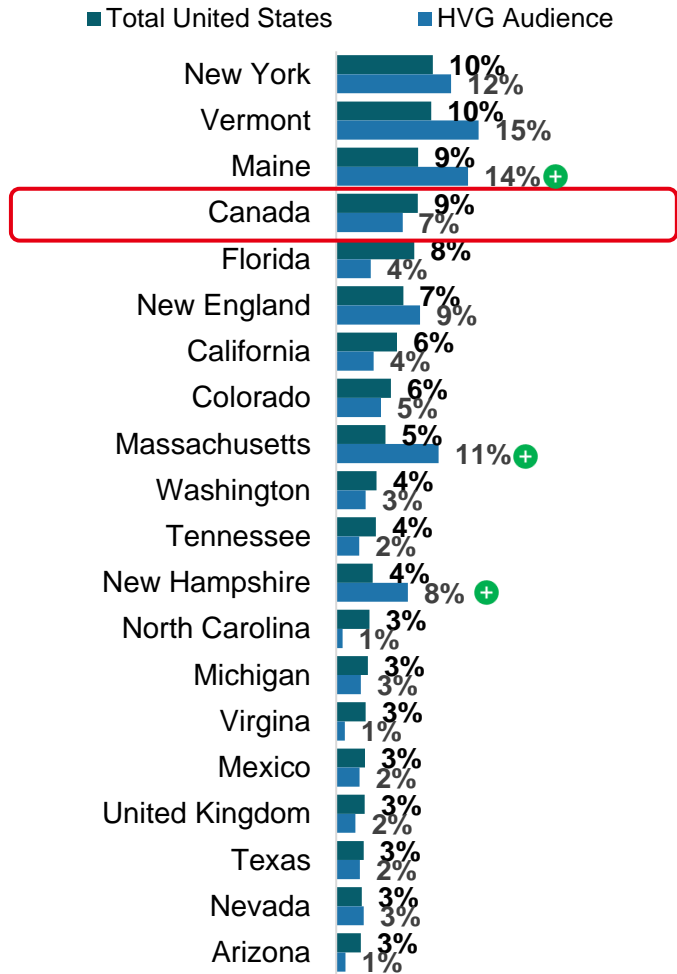


Fall Season Description

Fall is the season between summer and winter. Fall tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While fall has some distinct activities and experiences, many summer activities can still be done in fall.

59 Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=2055); HVG (n=122)
 D3. In general, how interested are you in taking a vacation trip to a destination during its fall season?

Unaided Fall Destinations



Fall Season Description

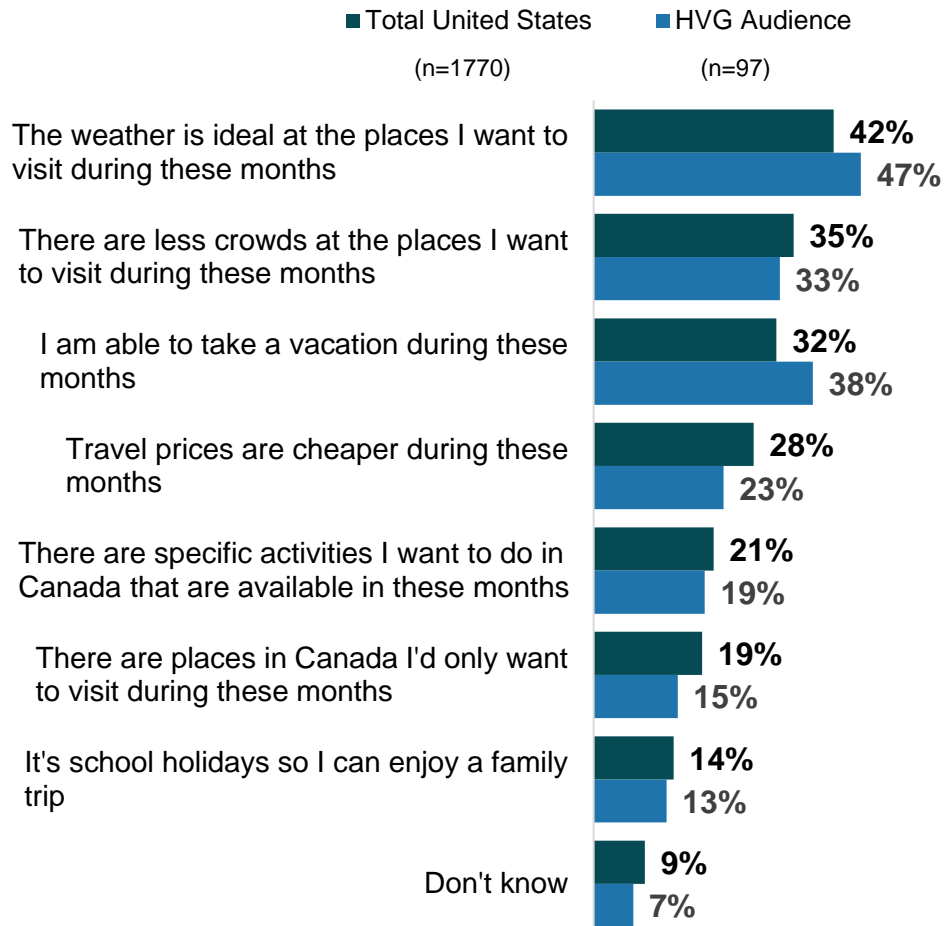
Fall is the season between summer and winter. Fall tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While fall has some distinct activities and experiences, many summer activities can still be done in fall.

Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
 Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=2055); HVG (n=122)
 B3. What destinations come to mind when thinking about travel to experience the **fall season**? (Please list up to 3 destinations. You can mention destinations within or outside of your state.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a vacation trip.

Motivators & Barriers for Fall Travel to Canada



Motivators for Fall Travel



Barriers for Fall Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a vacation to **Canada** during the months of September, October and/or November... Which of the following describes why you would be interested in travelling to Canada for a vacation during these **fall months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November E7. You indicated earlier that you are not considering taking a vacation to **Canada** during the months of September, October and/or November... Which of the following describes why you would **not** be interested in travelling to Canada for a vacation during these **fall months**?

United States GTRP – December 2023

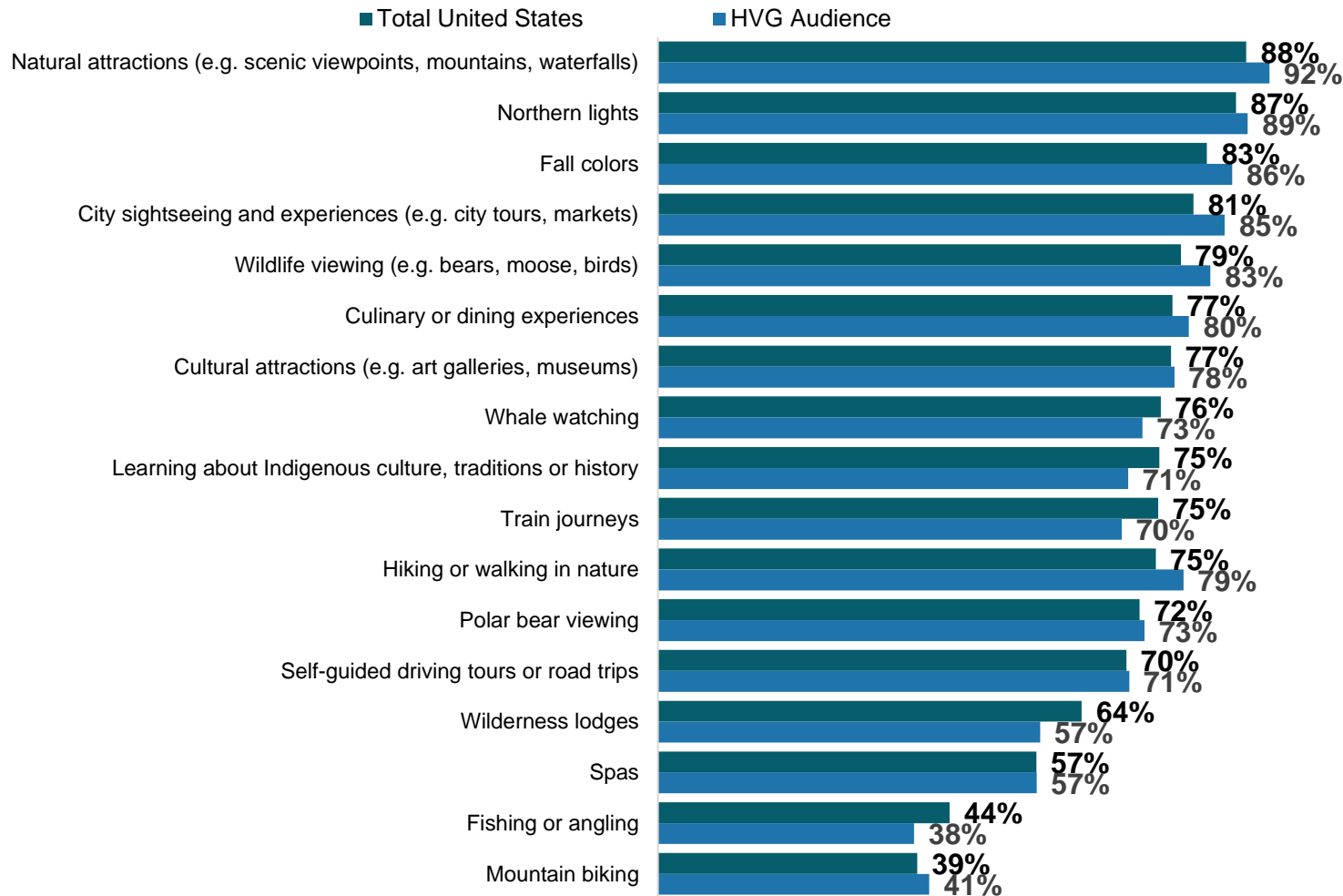


+ / - = significantly higher/lower result (vs. Total)

Interest in Fall Activities in Canada



% Somewhat/Very interested





Indigenous Tourism



Unaided Mentions – Indigenous Cultural & Tourism Activities

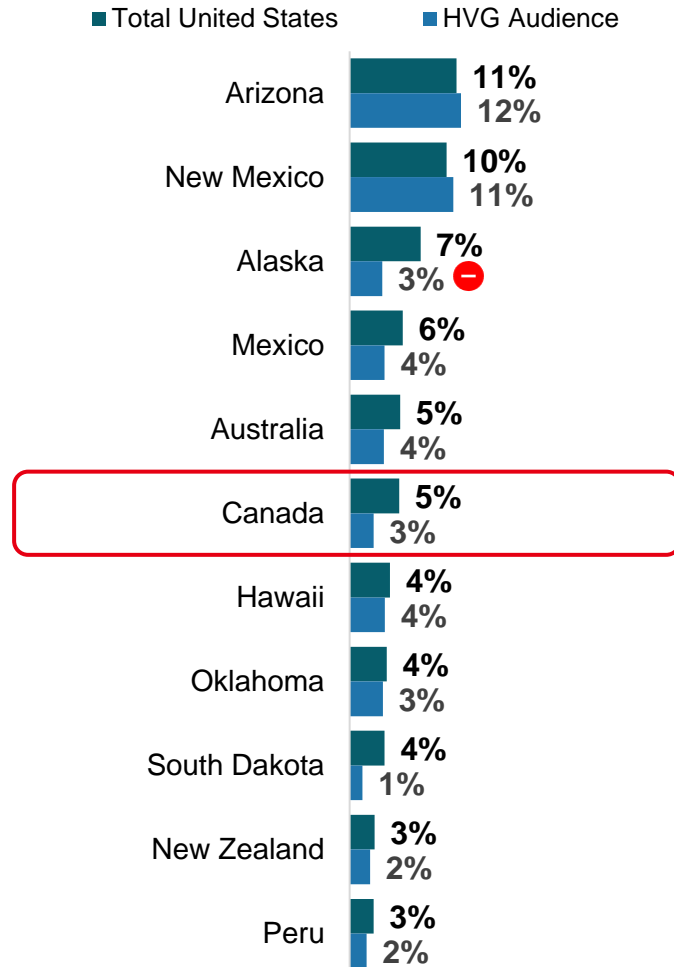


Indigenous Peoples Description

Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people.



Unaided Indigenous Tourism Destinations

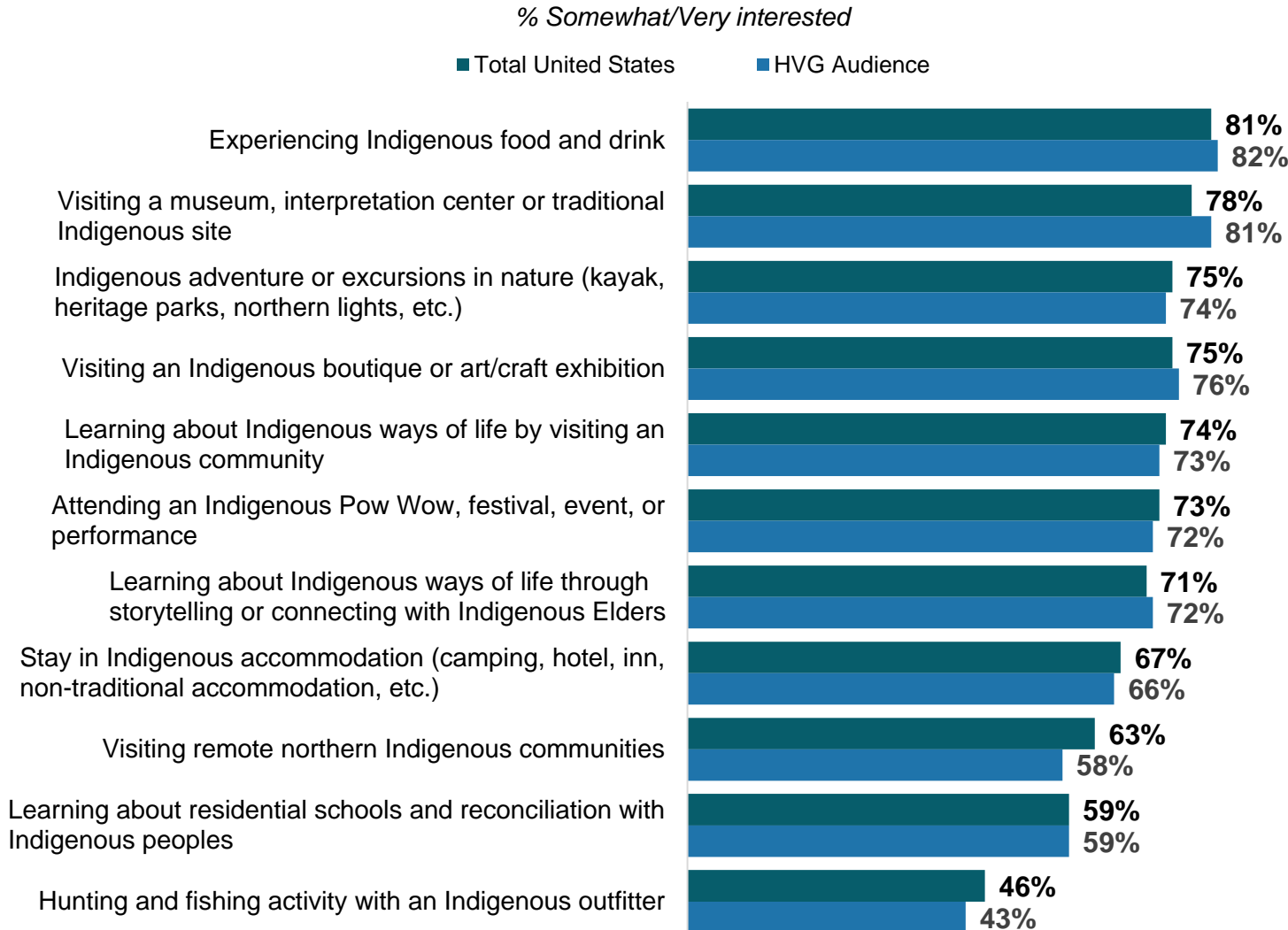


Indigenous Peoples Description

Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people.



Interest in Indigenous Cultural & Tourism Activities



Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.



Most Recent Trip



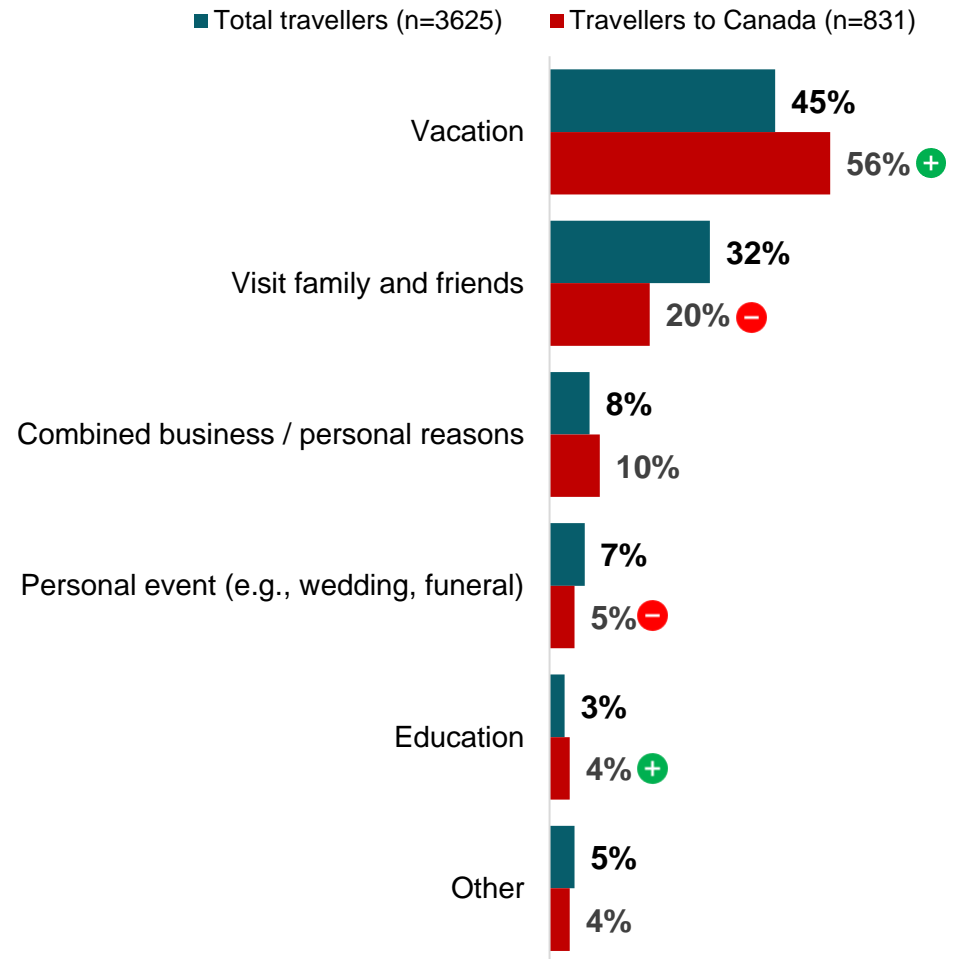
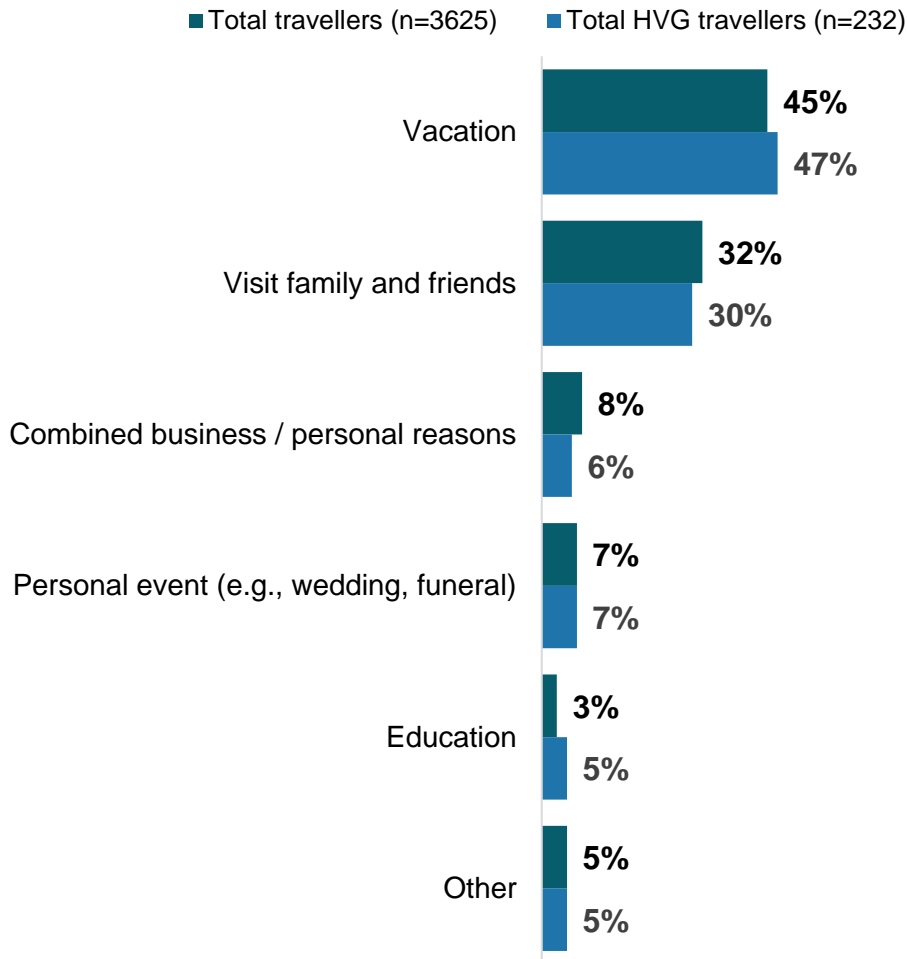
Lake Louise
Alberta



Main Purpose of Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

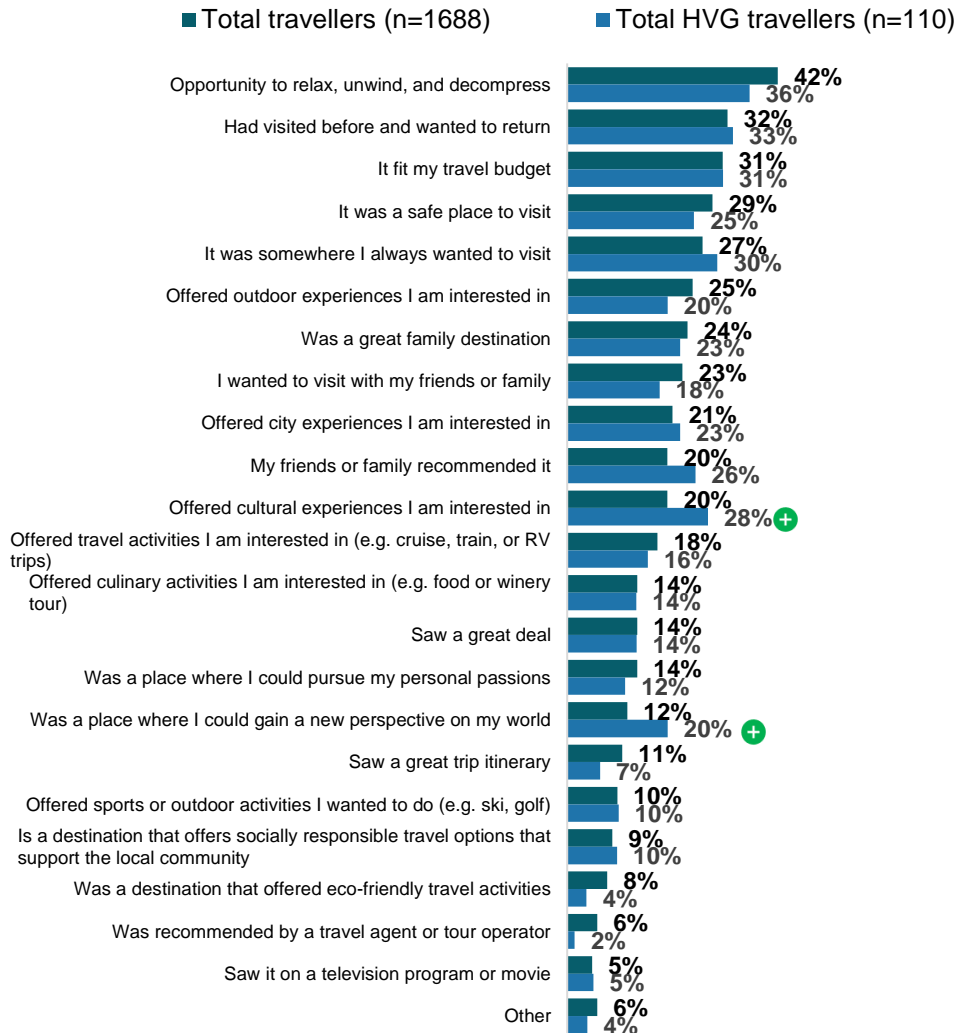
Total Travellers to Any Destination vs. Total Travellers to Canada



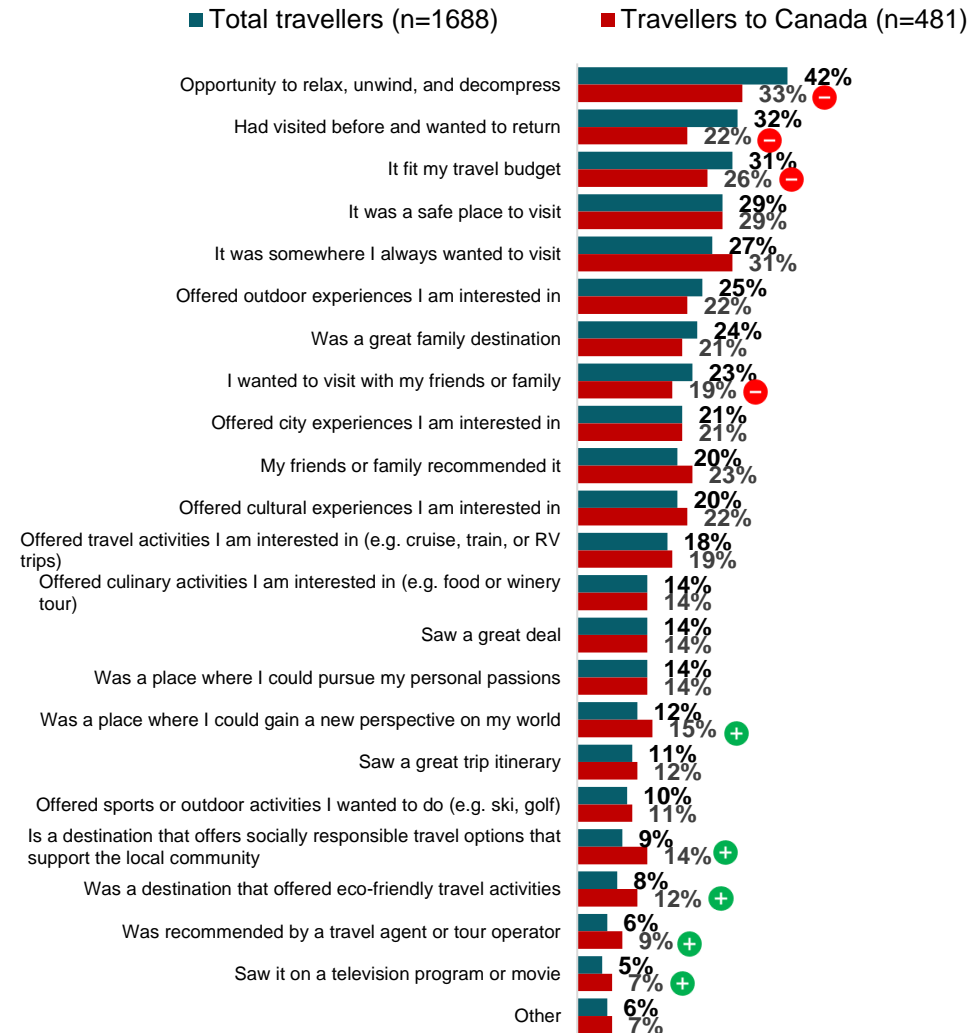
Factors in Choosing Destination for Recent Trip



Total Travellers to Any Destination vs. HVG Travellers to Any Destination

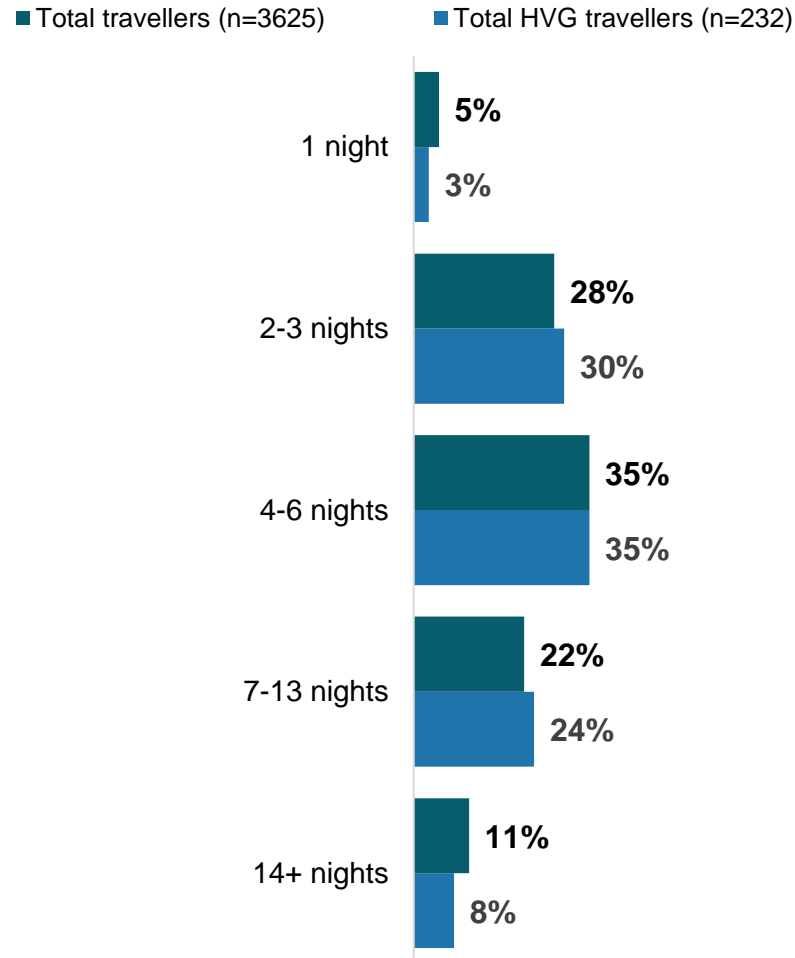


Total Travellers to Any Destination vs. Total Travellers to Canada

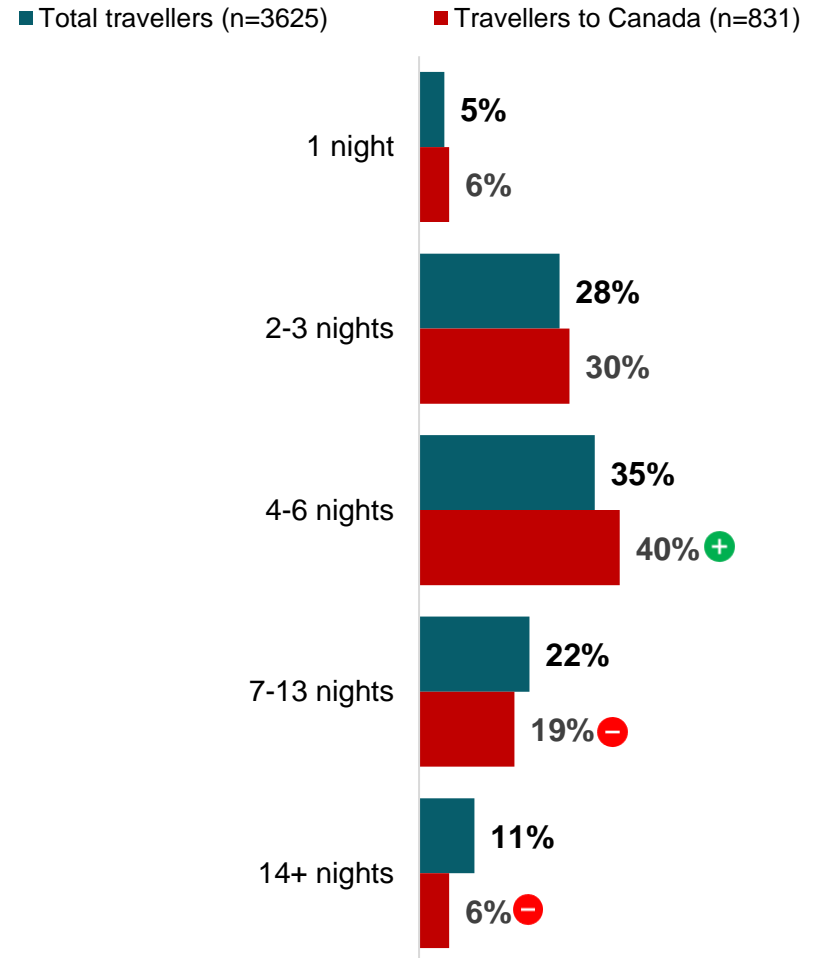


Nights Spent During Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

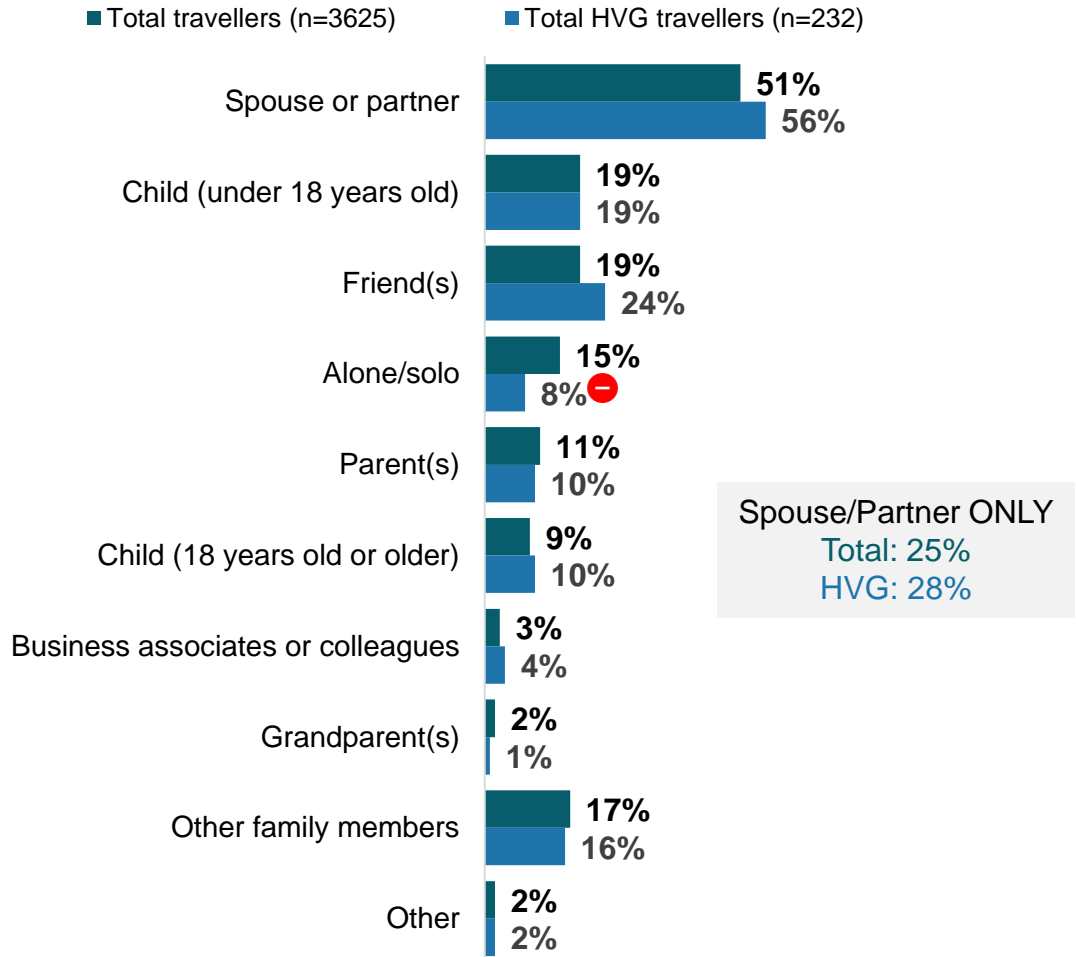


Total Travellers to Any Destination vs. Total Travellers to Canada

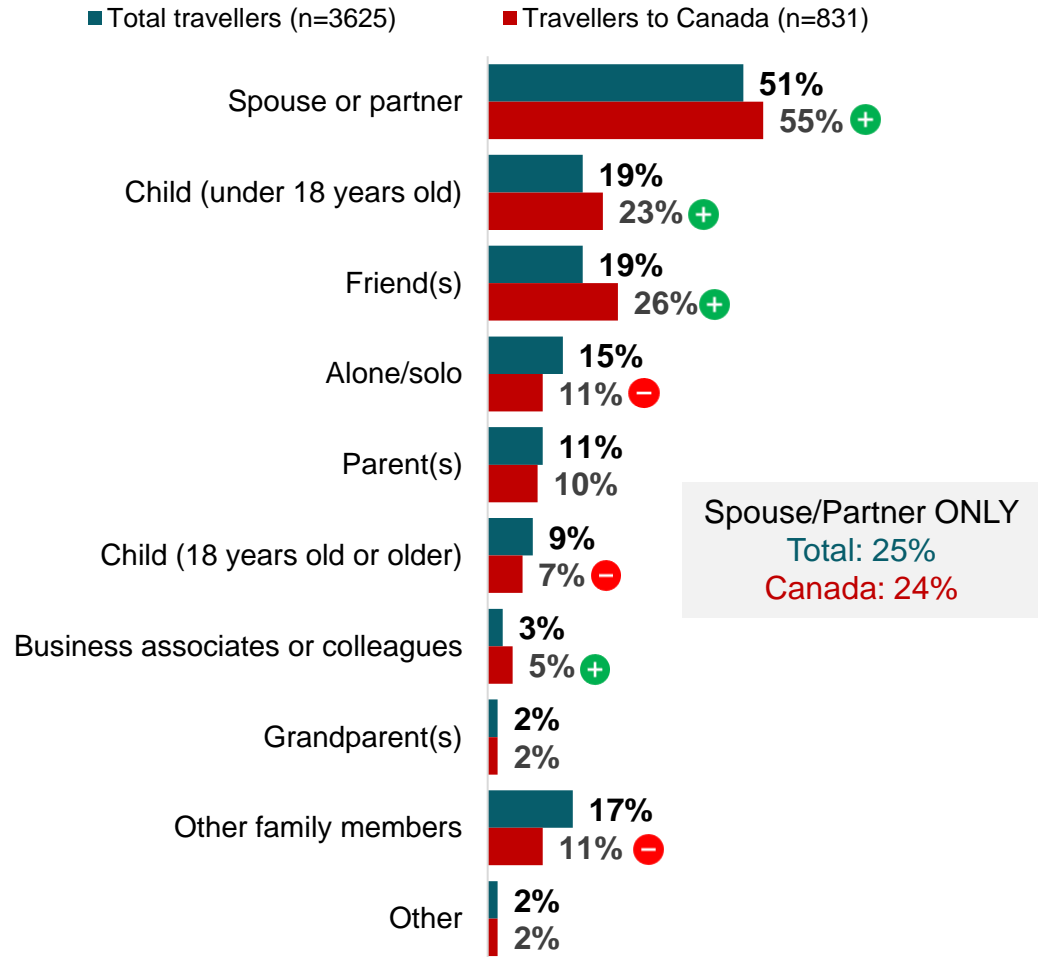


Travel Party of Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

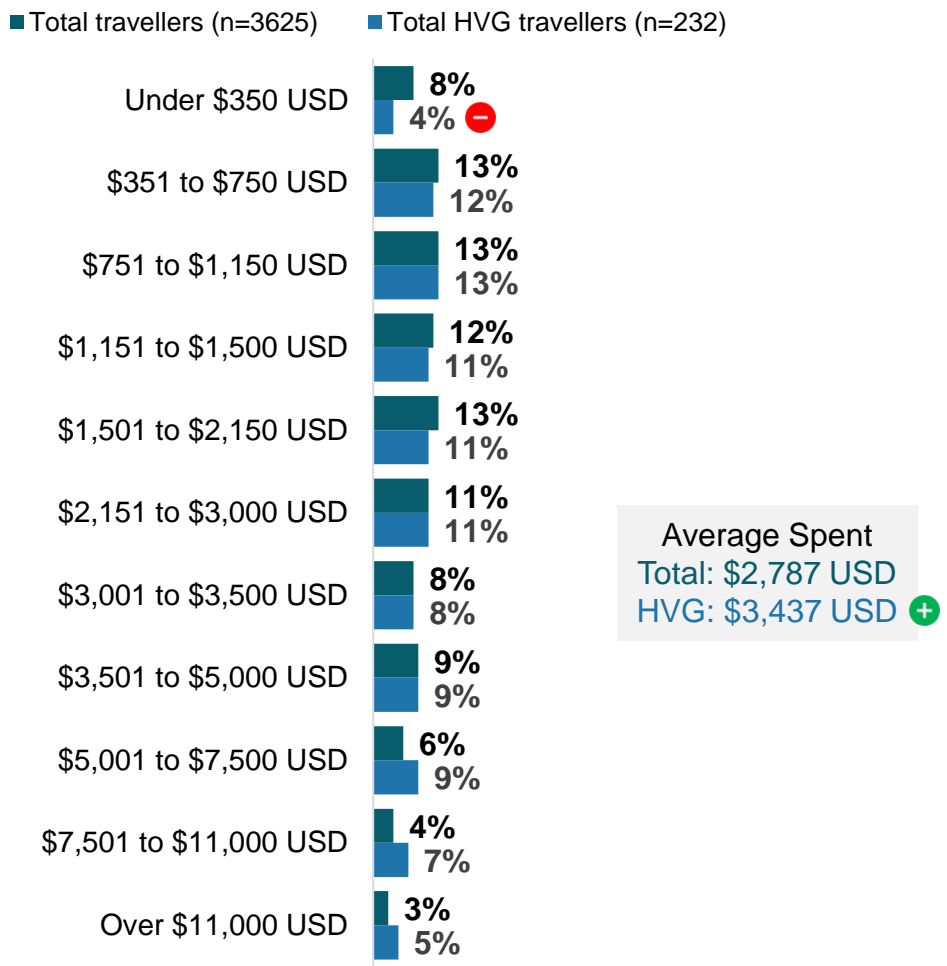


Total Travellers to Any Destination vs. Total Travellers to Canada

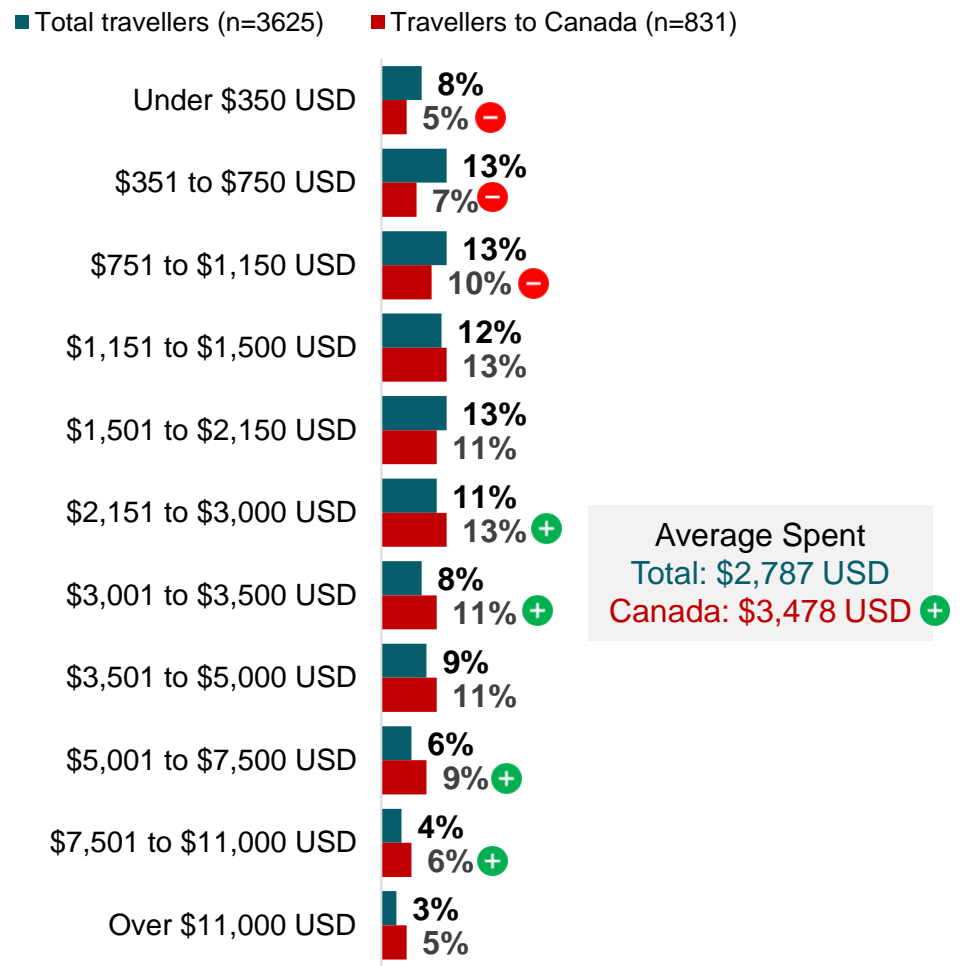


Amount Spent for Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



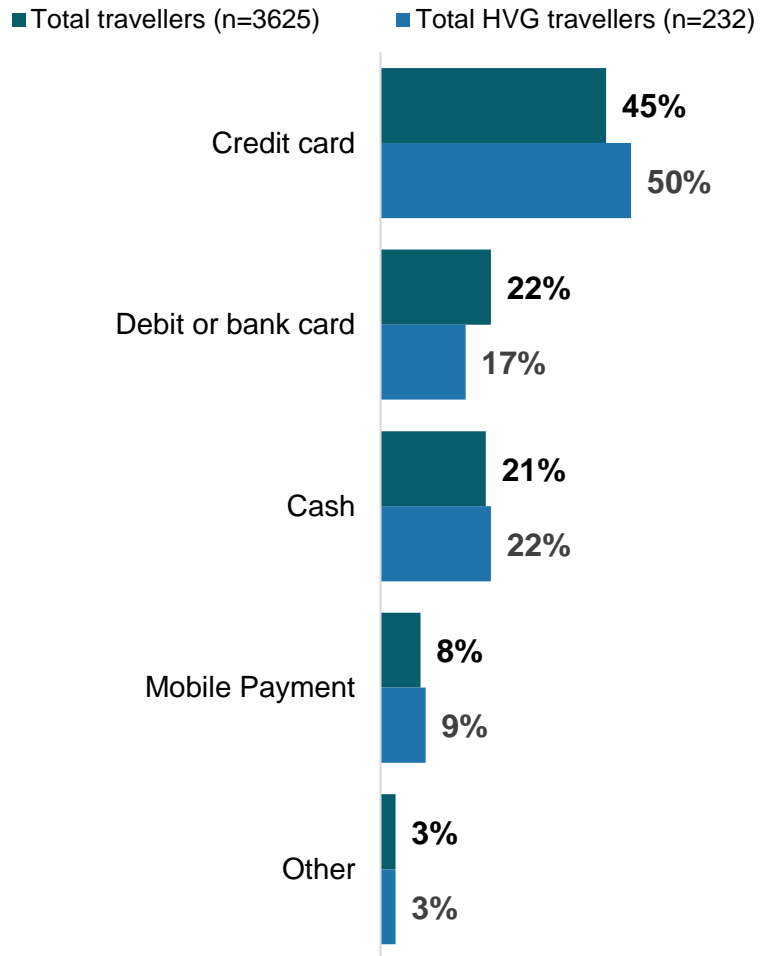
Total Travellers to Any Destination vs. Total Travellers to Canada



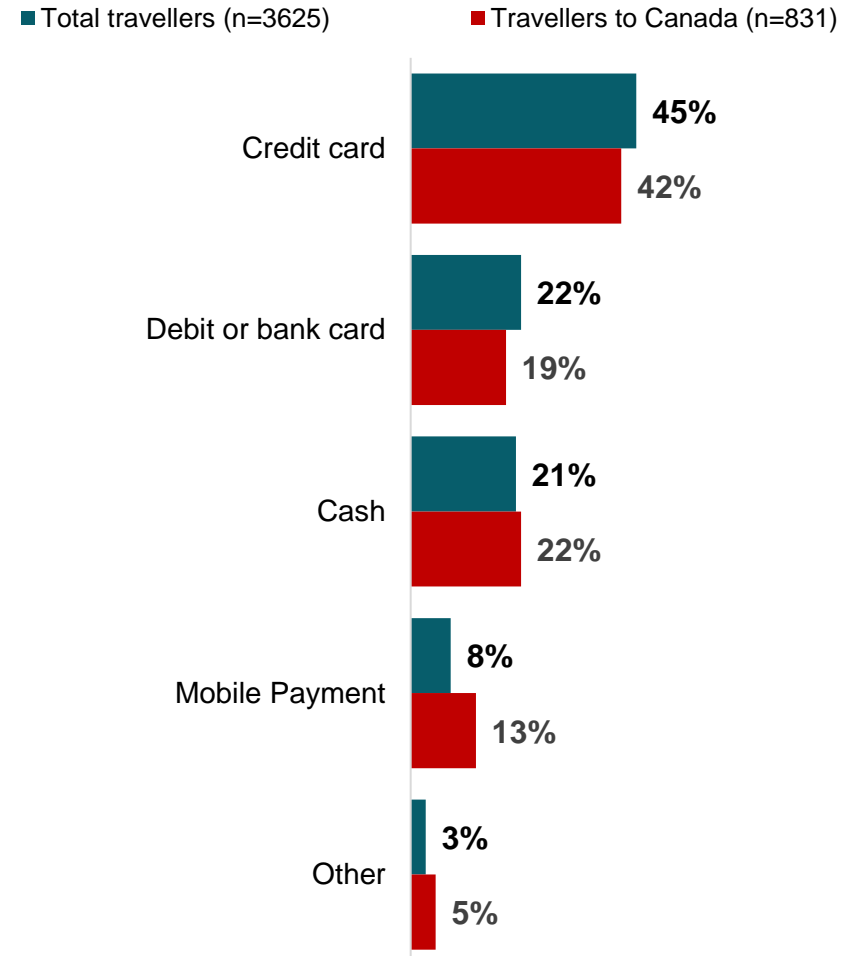
Payment Methods for Recent Trip



Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada

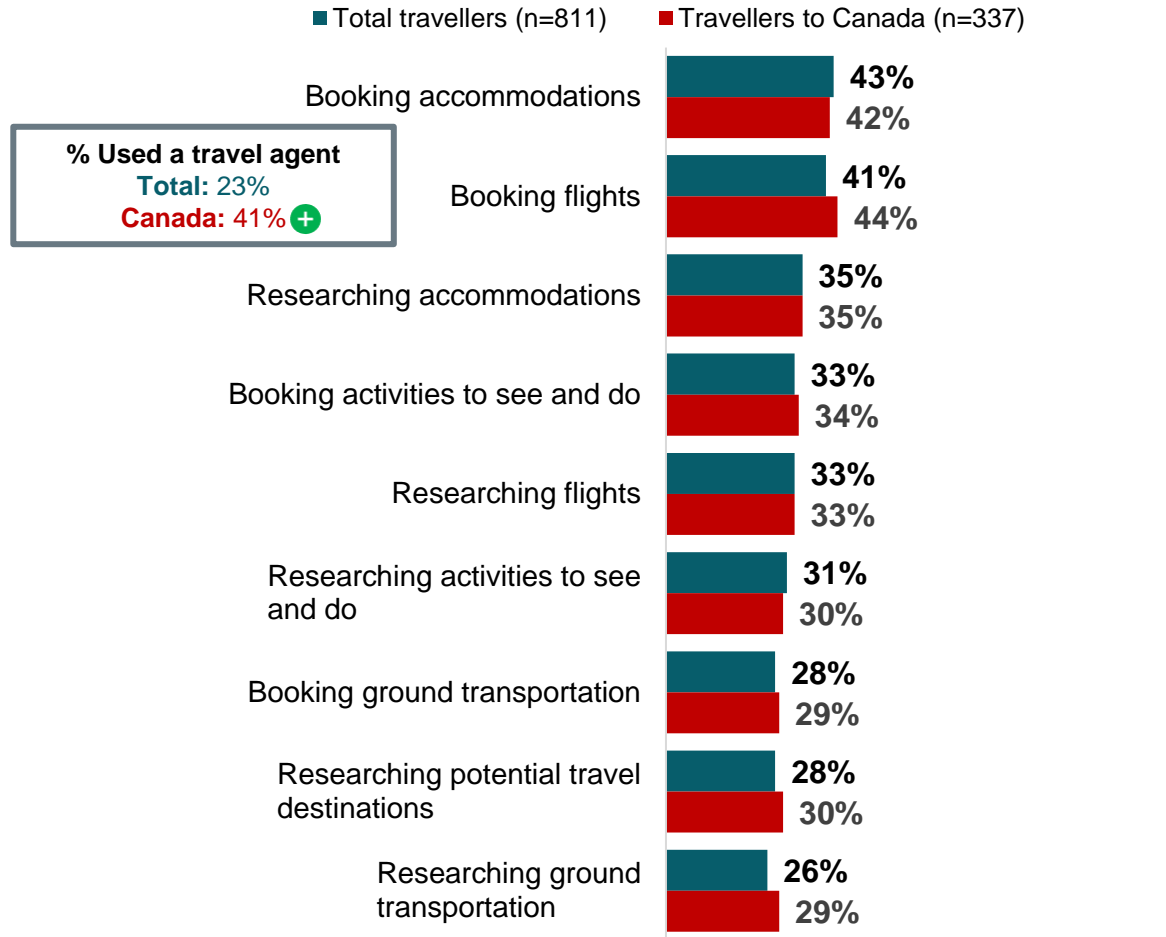
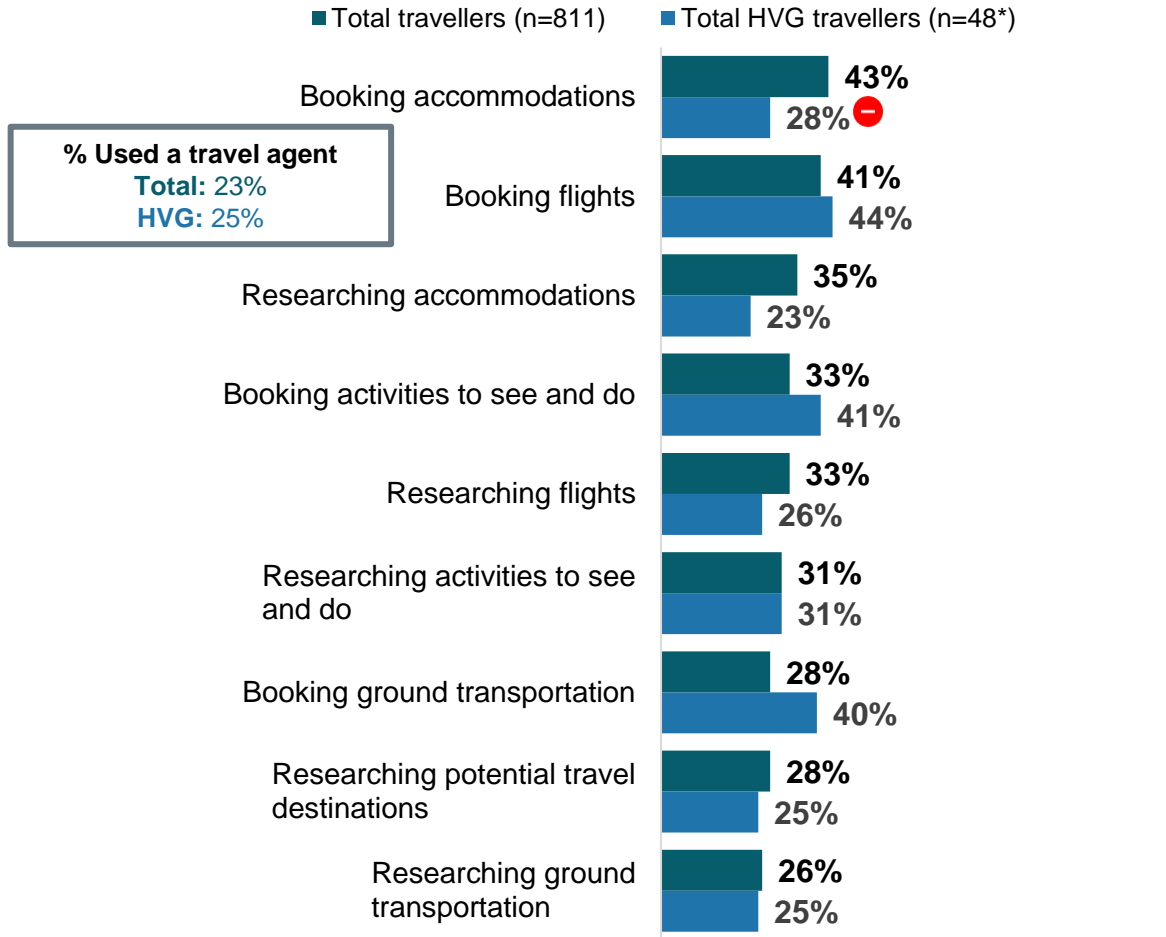


Travel Agents/Tour Operator Usage For Recent Trip



Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada



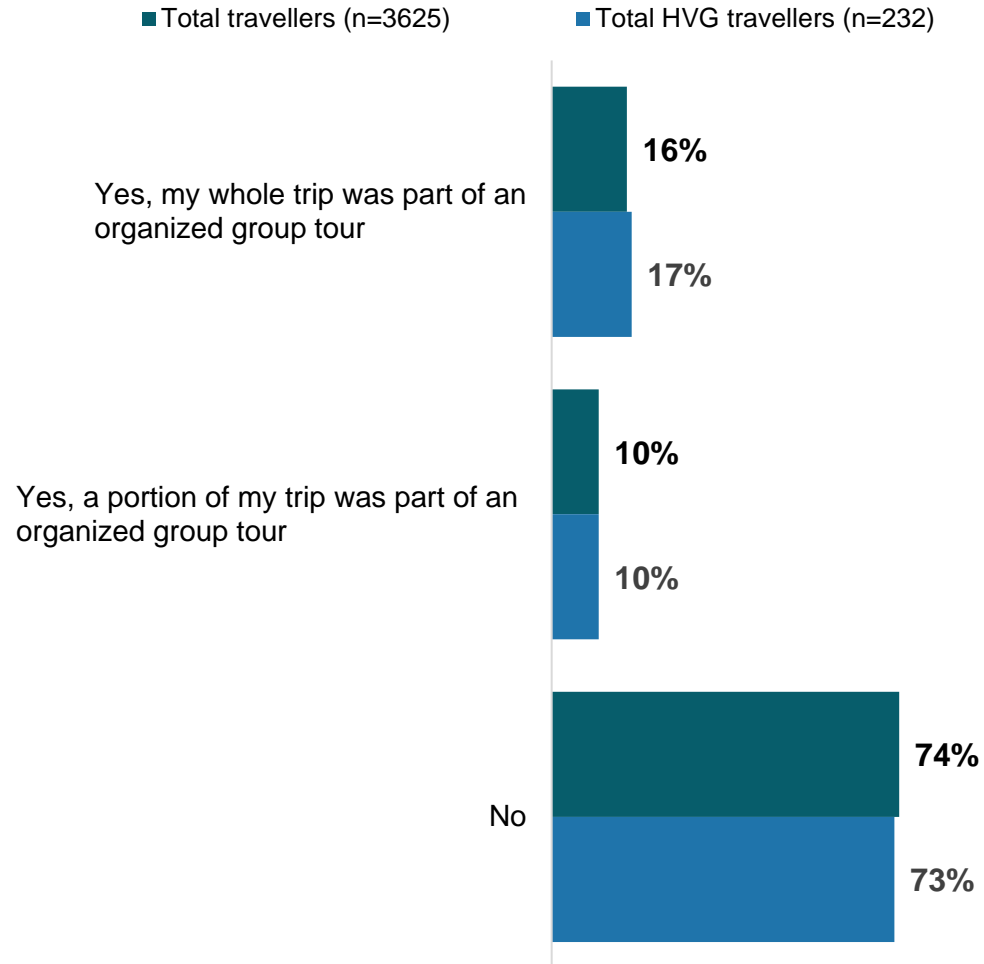
Base: Out of state pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=811); HVG (n=48*); Travellers to Canada (n=337)
 F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Collette Vacations or Liberty Travel, they do not include online booking engines like Expedia or Travelocity. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
 F10. Which of the following did a travel agent or tour operator help you with?
 *Small base size, interpret with caution (n<50)



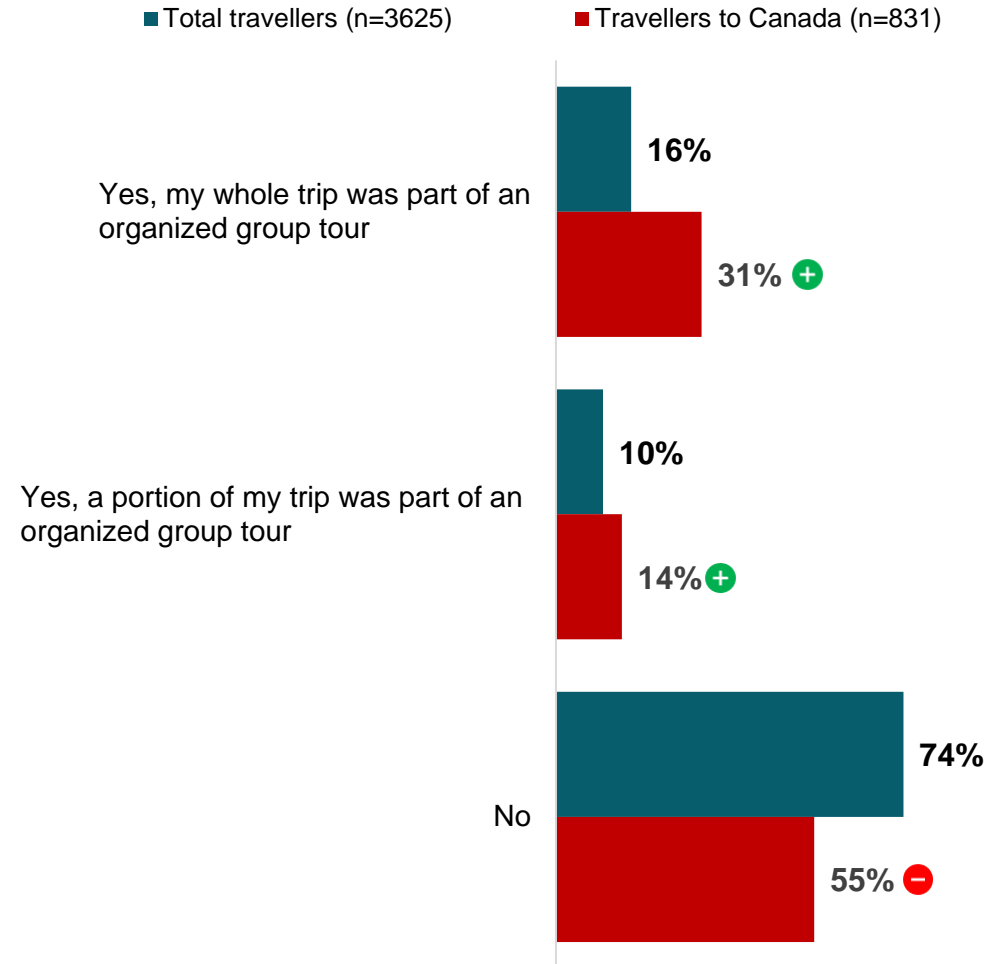
Organized Group Tour Usage For Recent Trip



Total Travellers to Any Destination vs. HVG Travellers to Any Destination

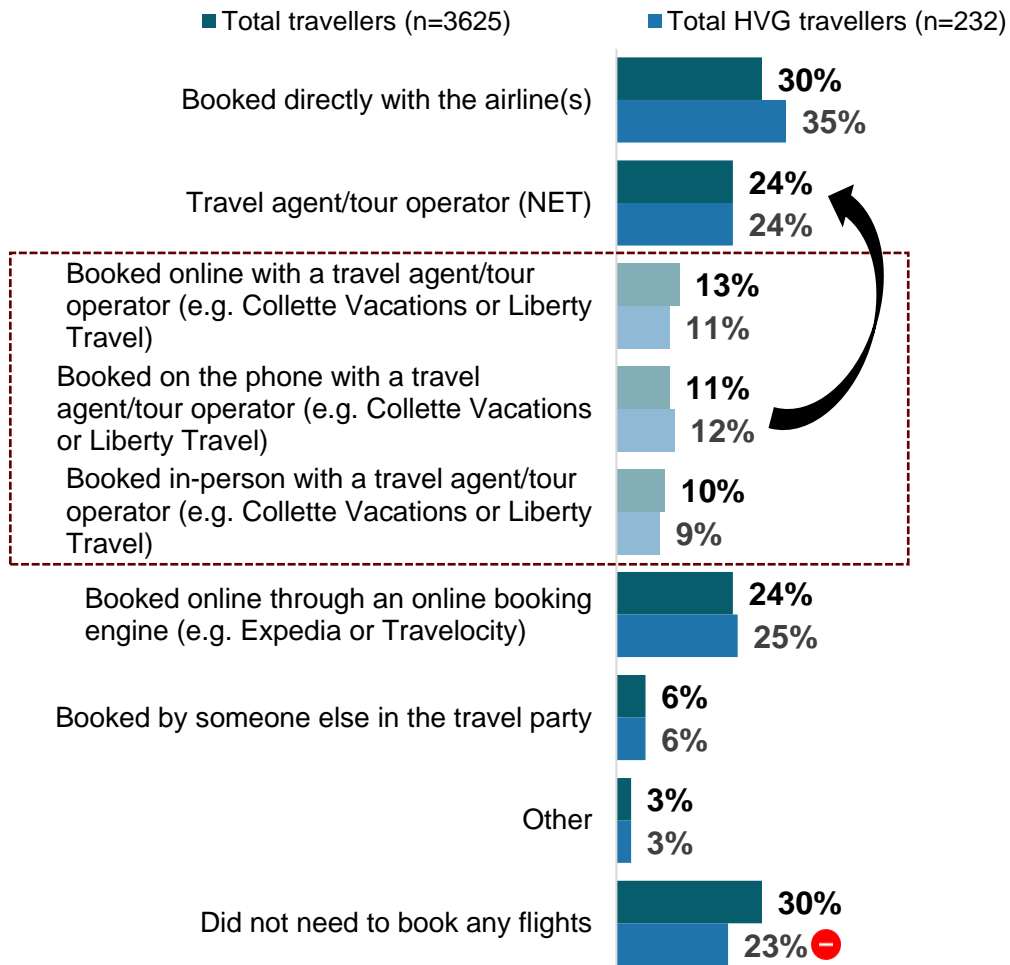


Total Travellers to Any Destination vs. Total Travellers to Canada

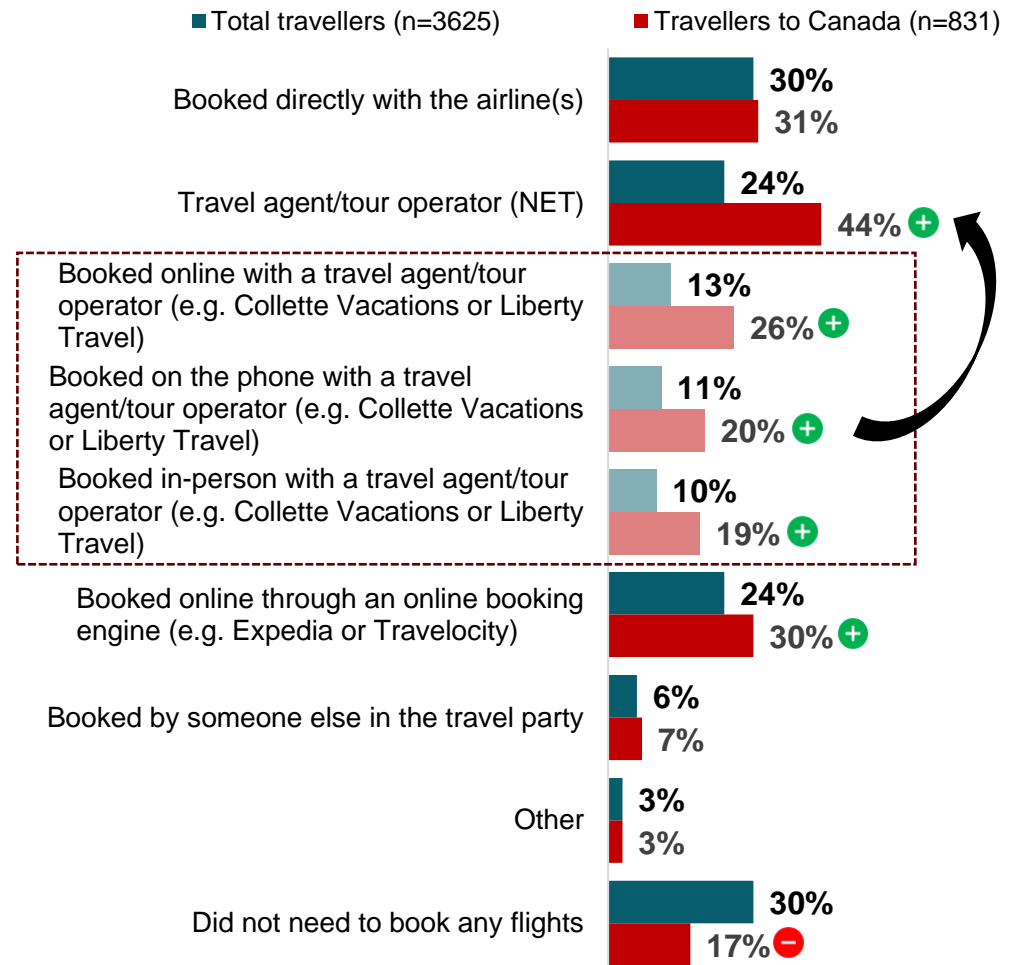


Booking Flights For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



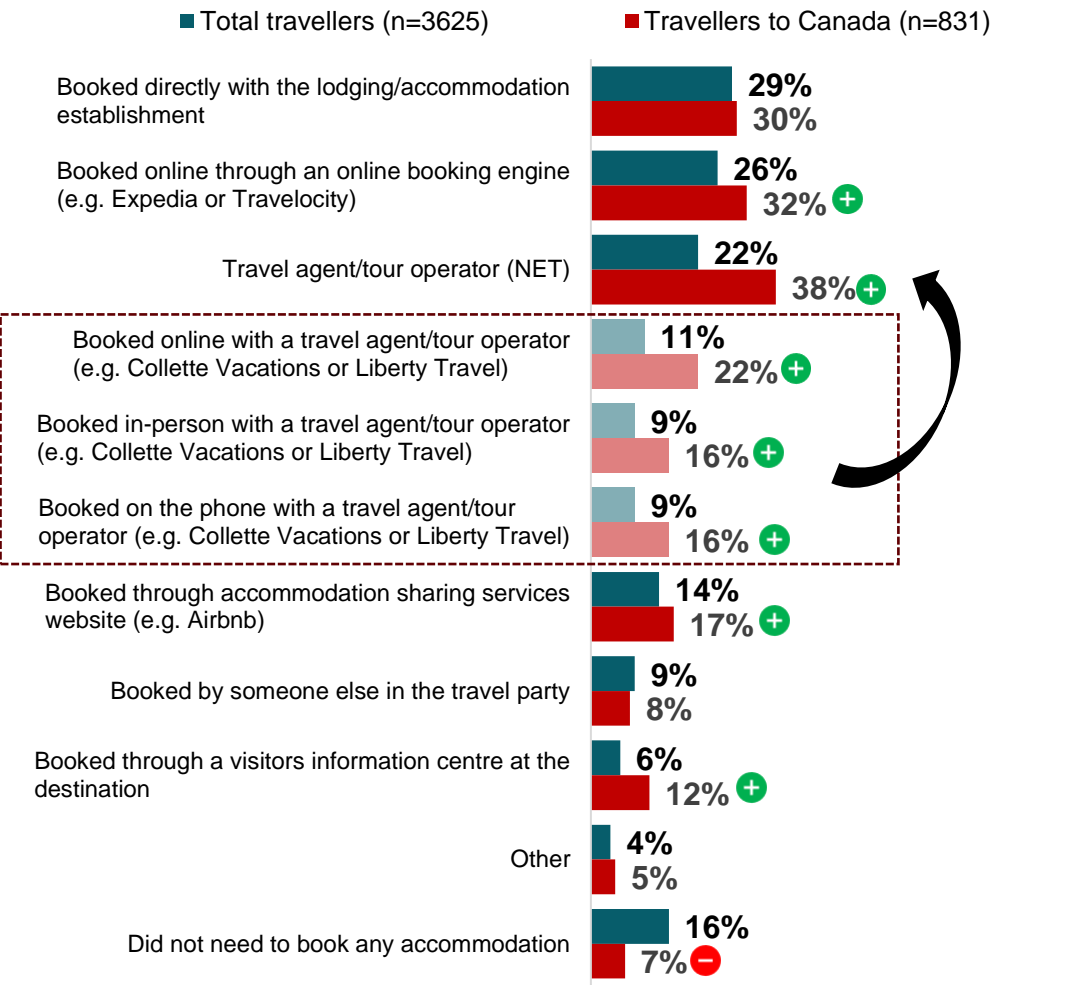
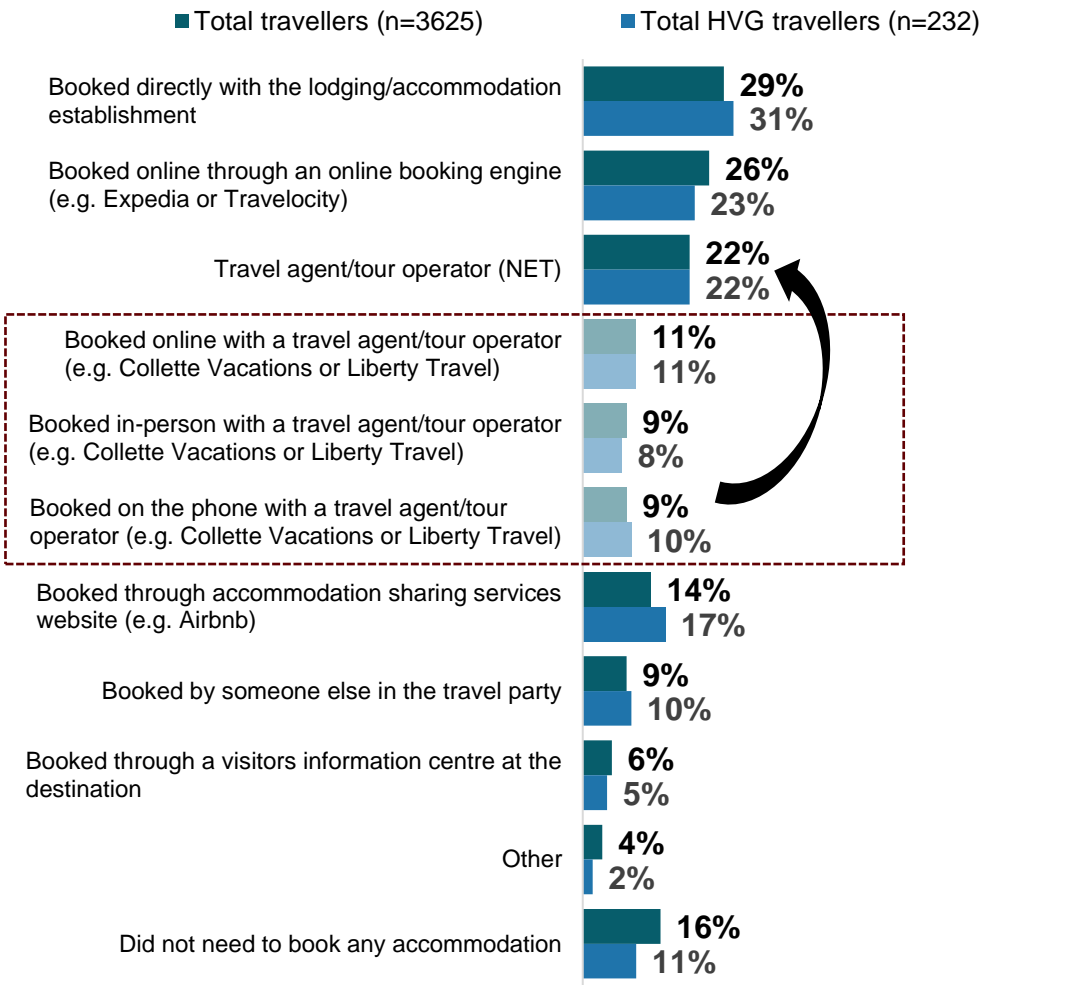
Total Travellers to Any Destination vs. Total Travellers to Canada



Booking Accommodations For Recent Trip

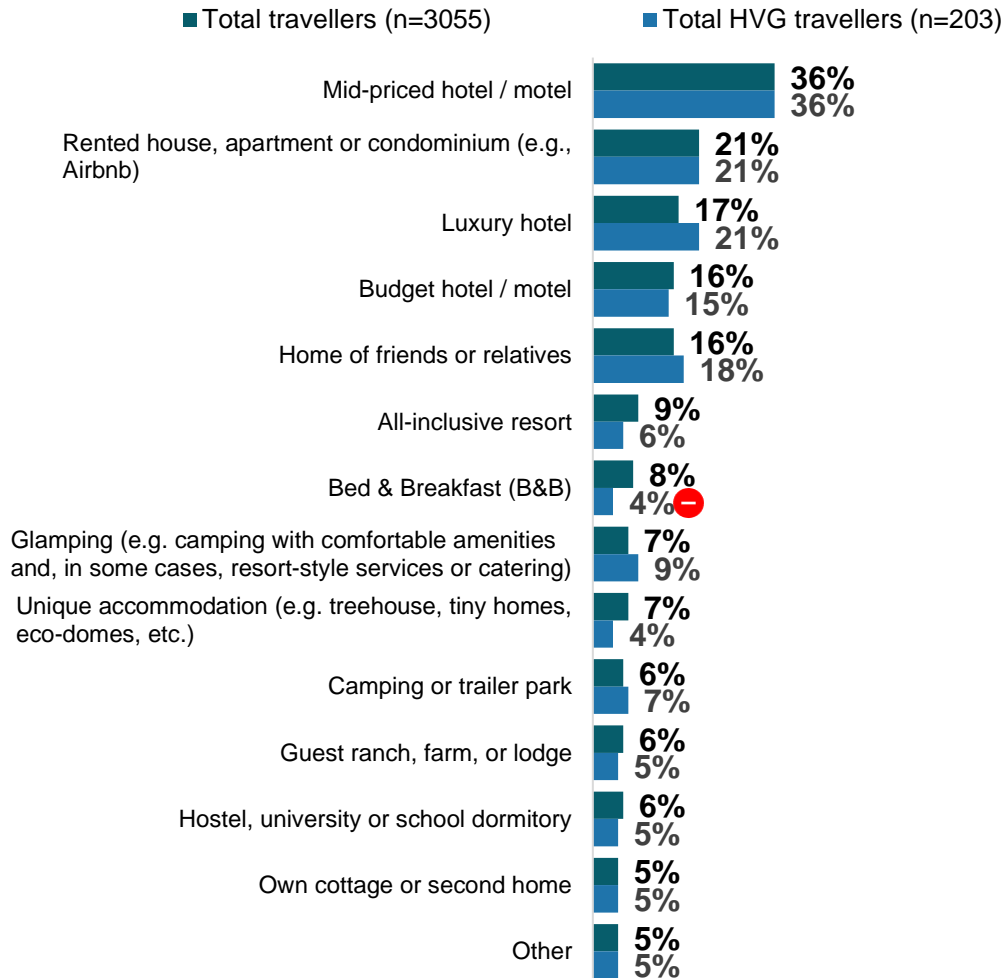
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada

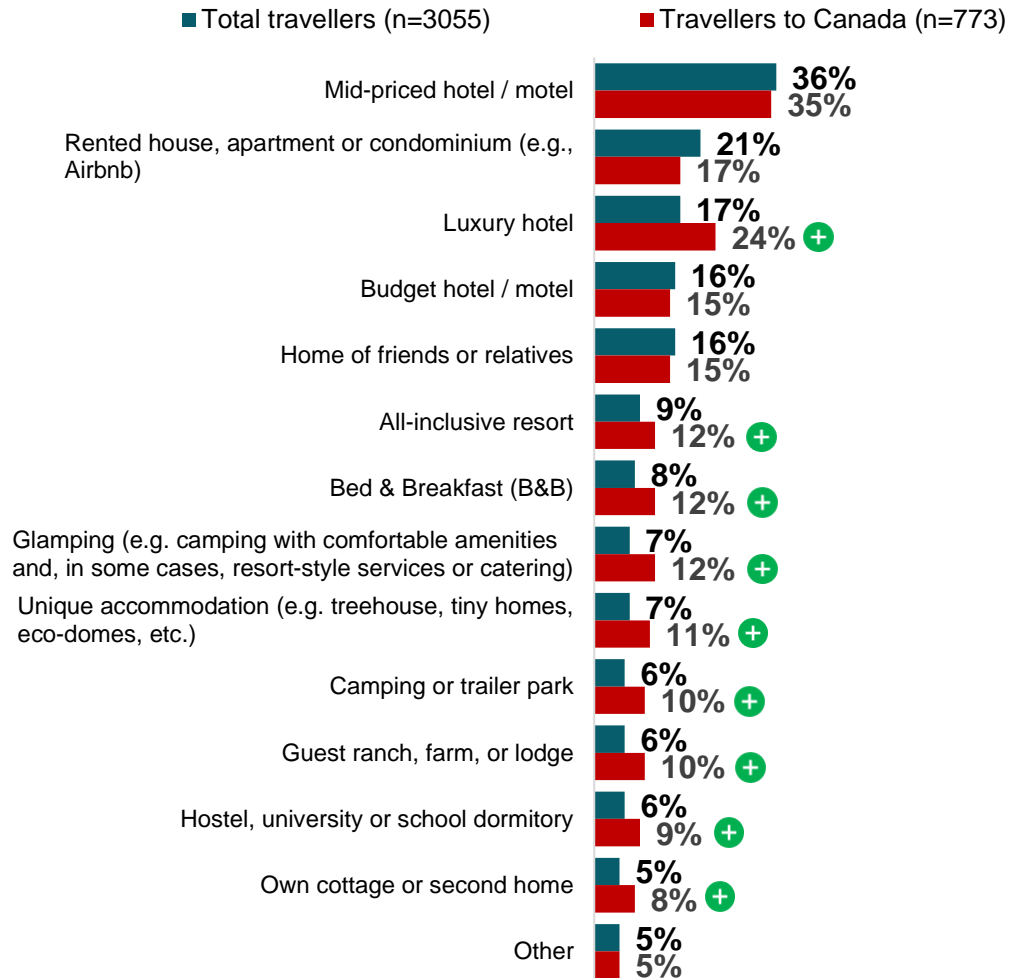


Type of Accommodations For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada

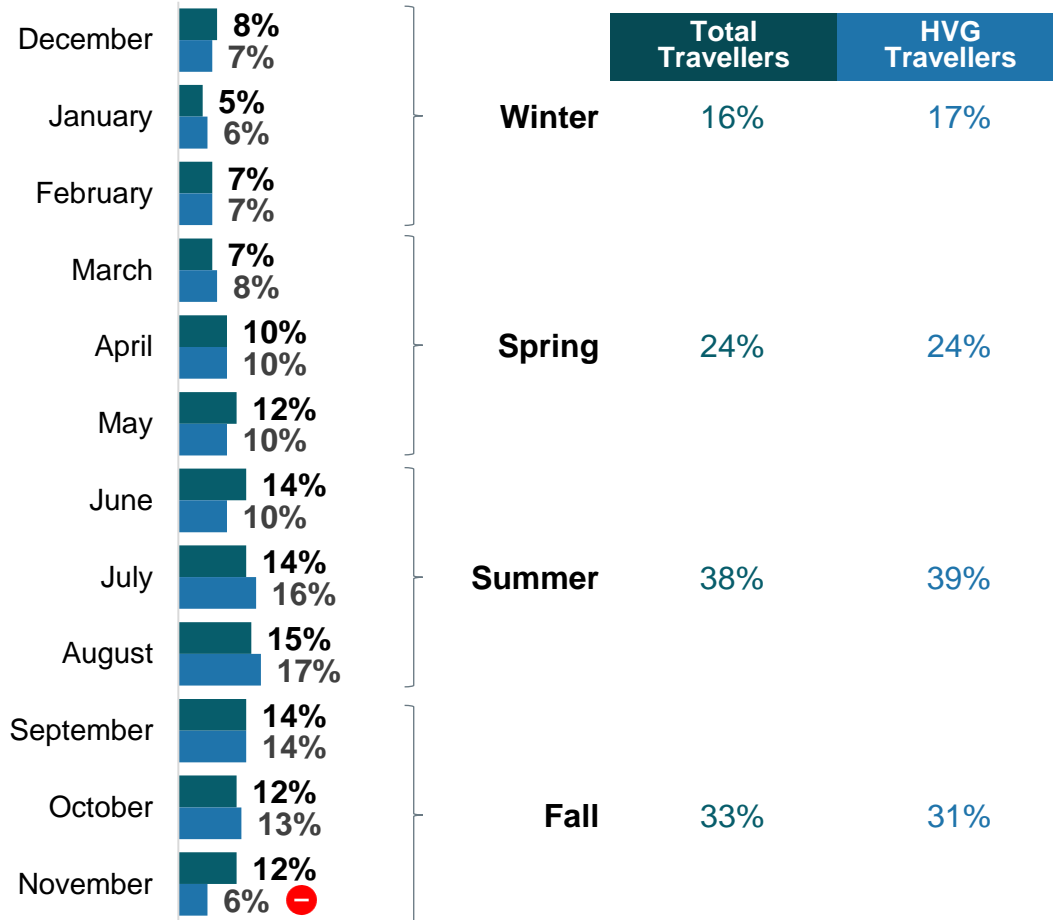


Time of Year Travelled For Recent Trip



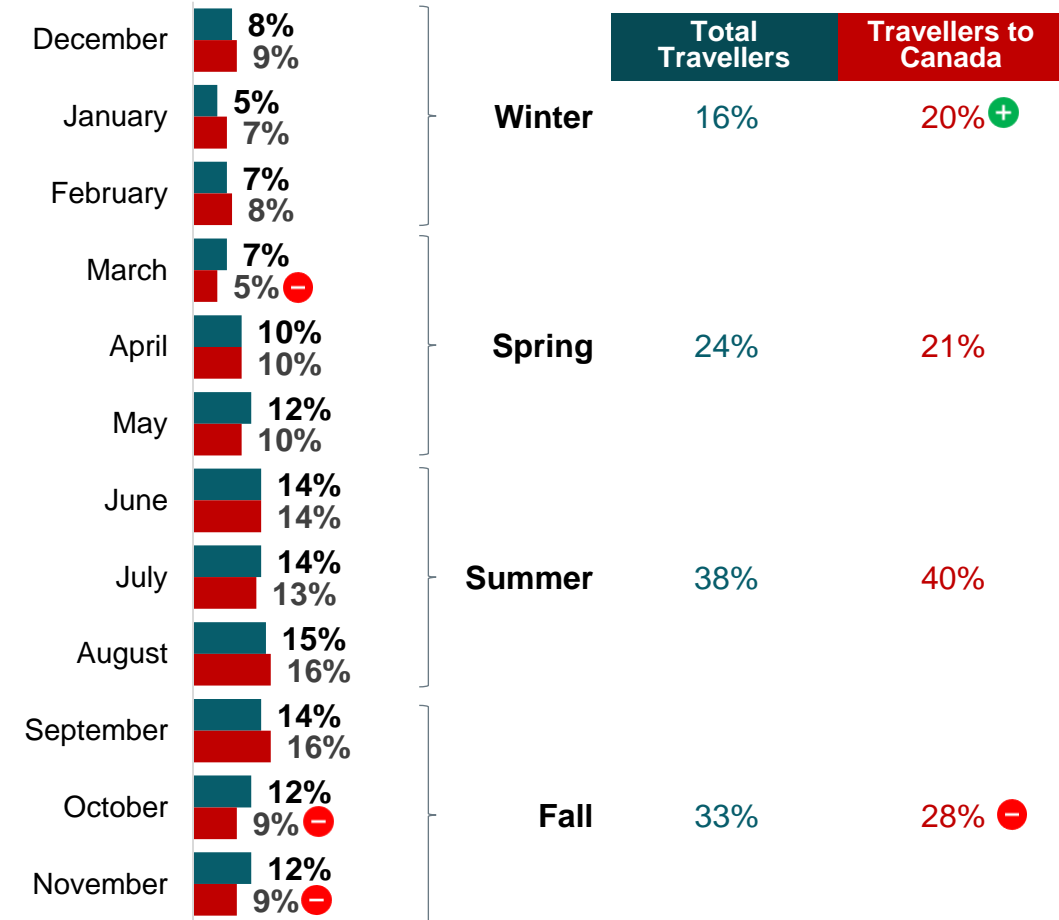
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

■ Total travellers (n=3625) ■ Total HVG travellers (n=232)



Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=3625) ■ Travellers to Canada (n=831)





Most Recent Trip to Canada



 Niagara Falls
Ontario

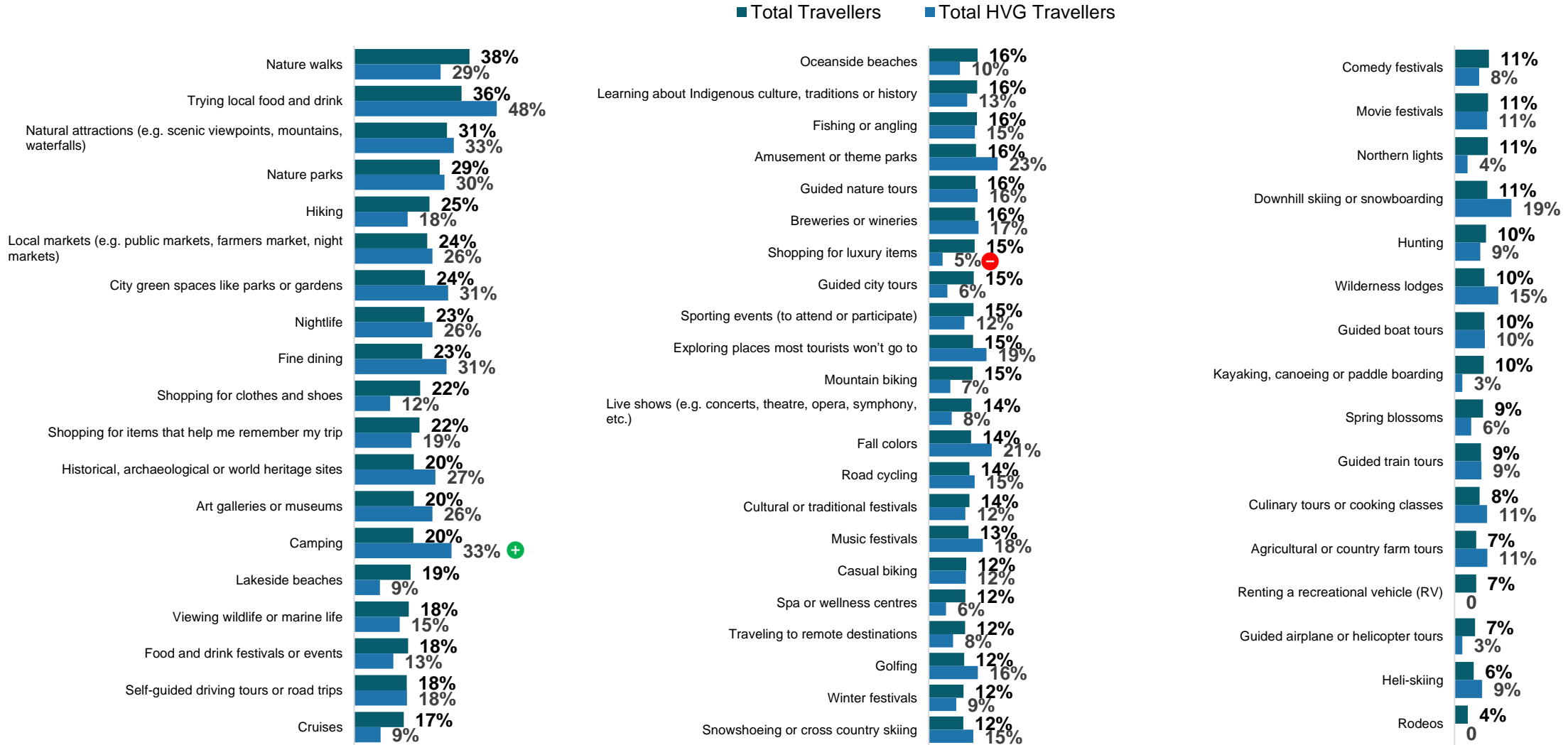


Top 10 Activities Participated in During Recent Trip to Canada

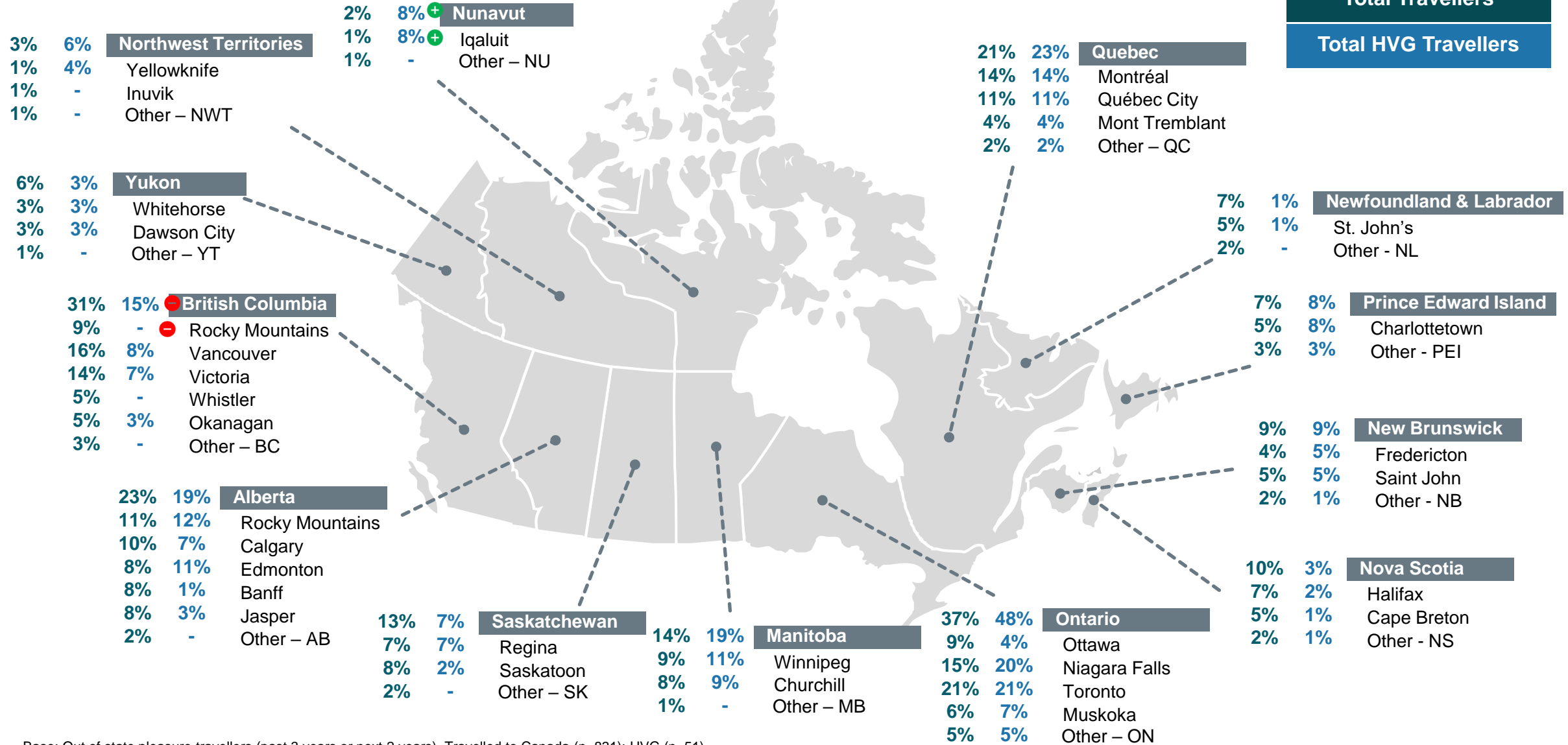


Total Travellers (n=831)	Total HVG Travellers (n=51)
Nature walks	Trying local food and drink
Trying local food and drink	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Camping +
Nature parks	City green spaces like parks or gardens
Hiking	Fine dining
City green spaces like parks or gardens	Nature parks
Local markets (e.g. public markets, farmers market, night markets)	Nature walks
Fine dining	Historical, archaeological or world heritage sites
Nightlife	Local markets (e.g. public markets, farmers market, night markets)
Shopping for clothes and shoes	Nightlife

Activities Participated in During Recent Trip to Canada



Canadian Destinations Visited During Recent Trip

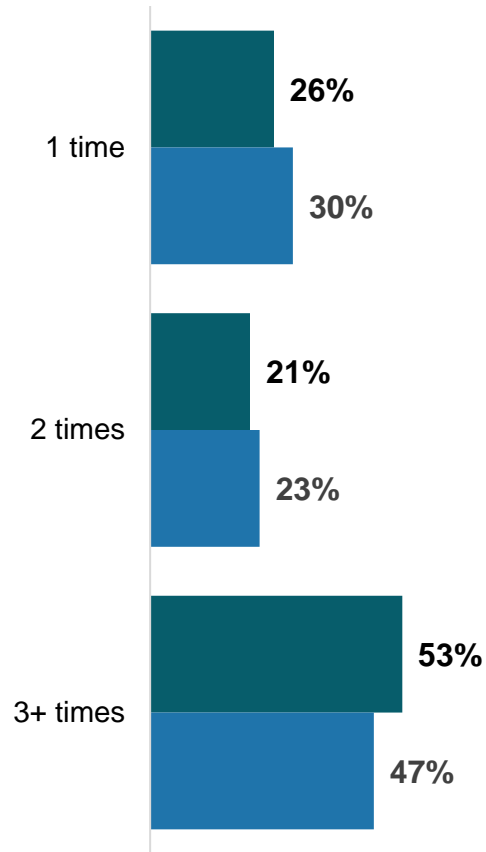


83 Base: Out of state pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=831); HVG (n=51)
 F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
 Base: Travelled to [PROVINCE/TERRITORY]
 F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

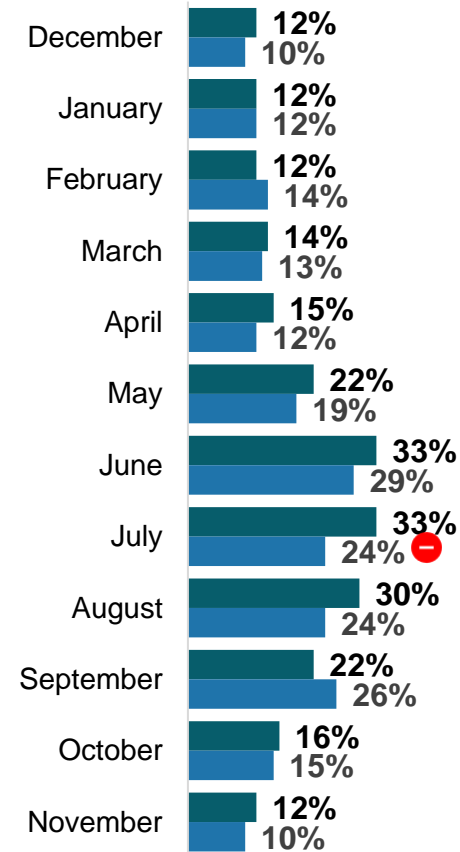
Number of Visits Ever & Time of Year Visited Canada



■ Total United States ■ HVG Audience



■ Total United States ■ HVG Audience



	Total Travellers	Total HVG Travellers
Winter	25%	26%
Spring	38%	35%
Summer	63%	55% -
Fall	35%	36%

Demographics

	All Out of State Travellers (n=4171)	HVG Audience (n=260)
Gender		
Male	53%	53%
Female	47%	47%
Other	-	-
Age		
18 to 34	37%	32%
35 to 54	29%	34%
55 or older	34%	34%
Children in household under the age of 18		
Yes	43%	41%
Ethnicity		
White	69%	67%
Black or African American	15%	6% -
Hispanic or Latino	9%	10%
Asian	6%	14% +
American Indian or Alaska Native	2%	1%
Middle Eastern	1%	1%
Native Hawaiian or Pacific Islander	1%	-
Other	2%	4%
Prefer not to answer	2%	1%
Identify as LGBTQ+		
Yes	12%	13%
Employed		
Yes	63%	61%
Household Income (Annually)		
Under \$50K	16%	10% -
\$50K to \$99K	38%	33%
\$100K to \$149K	21%	22%
\$150K or more	16%	23% +

THANK YOU

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



CANADIAN TOURISM DATA
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