US STRATEGIC REPORT

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

DESTINATION **CANADA**

CANADIAN TOURISM DATA
collective

Focus of This Report

- *Study Overview*

- *Key Insights*

- *Overall Travel Outlook & Trends*

- *Canada vs. Competitive Destinations*

- *Increasing Fall & Winter Visitation*

- *Sustainability*

- *Indigenous Tourism*

DESTINATION CANADA

Montreal
Quebec

Study Overview: United States Market

DESTINATION CANADA

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**

TOTAL U.S. PERSPECTIVE
Where applicable, insights are drawn from two of YouGov's proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of Total Americans 18+

- 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.

Key Insights

Travel Outlook & Trends

- The **appetite for travel** in the US remains **strong**, exhibiting a **positive trend** for both domestic and international trips over the past three years

- Americans **favour travel in the warmer months** – with Summer being the peak season when 87.7M typically travel out-of-state

- Nearly one-third of travellers **add on vacation days to business trips** or choose to **work remotely** during a vacation

- Syndicated results highlight **the importance of social media** when destination marketers evaluate their media mix

- When Americans travel, flights and accommodations are most often **booked directly with the airline/establishment,** followed by **travel agents and tour operators,** and **online booking engines**

- When it comes to trips to Canada, the utilization of travel agents and tour operators is more prevalent compared to other destinations. In fact, it is the most **preferred method** for booking **flights** and **accommodations**

- Travellers express a **moderate level of concern** as it relates to both **international conflict** and **weather-related impact** on travel plans; Destination Canada could **consider educating potential visitors** about the impacts these events may be having and offer assurance where possible

Canada vs. Competitive Set

- **Canada** continues to be a **leading international destination** among Americans, but with the **preference for domestic travel** consideration, **trails the states** of Florida, California and New York

- **The next 2-year immediate potential for Canada is 53.6M**, including 4.0M HVGs

- **Past visitors** have a **strong affinity** for Canada, with NPS scores surpassing that of most domestic destinations and it is worth noting that **Canada's NPS is highest** among those who **visited in the Winter and Fall**

- This reinforces **the opportunity to bolster brand love** (not just among HVGs) and encourage advocacy among visitors

- **Canada** owns *safety* and *a great place to see wildlife in its natural habitat* (only among HVGs) but **does not exhibit other strengths** relative to key competitors

- Among HVGs, Canada does **stand out on its brand value statements** with relative strength on *having wide-open landscapes, being a place where people are welcoming* and *being a place where people are open-minded* but these spaces are shared

Key Insights

Key Drivers & Opportunities

- The **top drivers** of consideration are: ***being a place to visit with my family/friends***, ***trending as a must-visit spot***, ***a good place to live*** and ***value for money***

- ***Is a good place to live*** is the brand value statement with **the greatest influence** as most others fall towards the bottom of the list among total travellers

- **The top drivers among HVGs** are similar, but also include *being a place where people are welcoming* and *having transport options that make it easy for me to get to from where I live*

- Of concern, **HVGs** are **less likely** than total travellers to **associate Canada** *with having a distinctive identity*

- **Several dimensions represent white space** in which no one destination dominates. Compared to top drivers of destination consideration, the following could be **key opportunity areas for Canada to focus on**: *being a place to visit with my family/friends* and *trending as a must-visit spot*. These are all areas Canada is performing below average vs. competitors

- **Secondary drivers** that also represent white space opportunities include: *a place to form lifelong memories, is environmentally friendly and has great outdoor activities*

Fall/Winter Travel

- There is an **opportunity for Canada to attract more visitors** in the Fall and Winter, with 73.3M and 57.6M who typically travel during these respective months

- **Canada** is a **top unaided destination** when thinking of **Fall** and the general interest in Fall vacations is strong, with 40% expressing that they are extremely interested

- There is higher conversion between those who typically travel during the Fall months and interest in taking a trip during a destination's Fall season (81%) compared to Winter travellers and interest in taking a trip during a destination's Winter season (59%).

- **Canada trails behind Colorado and Florida** (a popular warm destination) in mentions as a **Winter destination**

- **Cold weather** is a **major barrier** to visiting Canada in the Winter and **outdoor activities** such as skiing are the **least desired**

- Destination Canada could consider highlighting the **Northern lights and indoor experiences** such as city experiences, culinary/dining and cultural attractions such as those related to the Indigenous community **to attract more Winter visitors**

Key Insights

Sustainable Travel

- While **sustainability** is only a **moderate priority** for most American travellers, *being perceived as an environmentally-friendly* travel destination can **drive consideration**

- **Efforts that carry the greatest importance** are conservation of natural areas, knowing the destination is open and welcoming to travellers and knowing the local culture is not negatively impacted by tourism

- There is a **perception** that sustainable travel is **more expensive**, but an **even greater proportion** of travellers say there is **a lack of information** around it

- **Approximately four in ten** travellers and HVGs **associate Canada** with *being a socially responsible destination and an environmentally-friendly destination*

- To **capitalize** on this opportunity, **communications highlighting** Canada's **sustainability efforts** and **educating travellers** could play a **crucial role** in leveraging this area to increase consideration of Canada as a destination

Indigenous Tourism

- **Arizona and New Mexico** are the destinations that **come to mind first**, followed by Alaska, Mexico and Canada

- However, there is **little consensus** as to what actual **Indigenous cultural and tourism activities and experiences might entail** – one in four make general mentions of the people and their culture

- When thinking of Indigenous cultural experiences and tourism activities in Canada, **interest is strongest** for sampling **food and drink**, visiting **museums/sites**, **exhibitions** and visiting an **Indigenous community/events**

- **Interest is lower** for visiting **remote locations**, **learning about residential schools/reconciliation,** or activities such as **hunting/fishing**

Overall Travel Outlook & Trends

Toronto
Ontario

Types of Travel Trips

Domestic vacation trip frequency is nearly double that of international trips. About four in ten American travellers and HVGs typically travel internationally at least once every two years.

	Total United States	HVG Audience

Legend: ■ 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

	Total United States	HVG Audience
Domestic vacation trips (within my home country)	11% 27% 31% 6% **74%**	11% 31% 29% 4% **75%**
International vacation trips (outside my home country)	14% 16% 8% 3% **41%**	17% 19% 5% 3% **44%** (−)
Business trips and meetings (outside my home country)	6% 7% 7% 4% **23%**	5% 8% 7% **22%**
Trips to attend business conferences or events (outside my home country)	5% 7% 7% 3% **22%**	6% 5% 5% 3% **19%**
Added personal vacation days to a business trip	8% 9% 8% 3% **28%**	8% 11% 3% **24%** (−)
Vacation trips where I choose to also work remotely from my destination	7% 9% 9% 3% **29%**	9% 6% 8% **24%** (−)

TOTAL U.S.
Twice as many Americans are planning to take a domestic vacation versus an international vacation (49% vs. 21%). However, intentions for both vacation types have seen significant increases over the last 3 years. But fewer individual trips are being planned

YouGov Global Travel Profiles (United States) – 2023 Base: Total Americans 18+

Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
A6. How often do you typically travel on each of the following types of trips?

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

Overall Demand for Out of State Pleasure Travel

DESTINATION CANADA

Total Population 18+ 260,962,000	x	**Out-of-State Traveller Incidence Rate** 56.6%	=	**Size of Target Market** 147,704,500

Size of HVG Population*
11,200,000

Total United States	HVG Audience

Potential Market Size

Total United States			HVG Audience		
Total potential out of state pleasure travellers aged 18 years or more	Target Market for Canada	Immediate Potential for Canada	Size of HVG population*	HVG Target Market for Canada	HVG Immediate Potential for Canada
147,704,500	**105,018,000**	**53,559,000**	**11,200,000**	**7,257,500**	**3,977,000**
	X 71.1% *Dream to purchase Stage for Canada*	X 51.0% *Likely to visit Canada in the next 2 years[1]*		X 64.8% *Dream to purchase Stage for Canada*	X 54.8% *Likely to visit Canada in the next 2 years[1]*

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)

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)

*Note: HVG population is based on the segment size of the PRIZM segments
[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)

Effective Types of Travel Advertising

Americans identify social media as the most effective form of travel advertising, in fact, it has ranked first every quarter for the last 3 years. Mentions have increased 7 percentage points between 2023 Q1 and 2023 Q4.

Effective Types of Travel Advertising (Top Responses)

Type	%
Social media	34% ▲
Travel websites	25% ▲
Direct mail (e.g., flyers, coupons, promotional material by mail)	22% ▲
TV - Free to view channels	21%
Online streaming services (including audio streaming)	21% ▲
Billboards (digital and/or posters)	16% ▲
Magazines - online	13%
Magazines - hardcopy/print	13%
Radio	12%
Local/Regional newspaper - online	12%
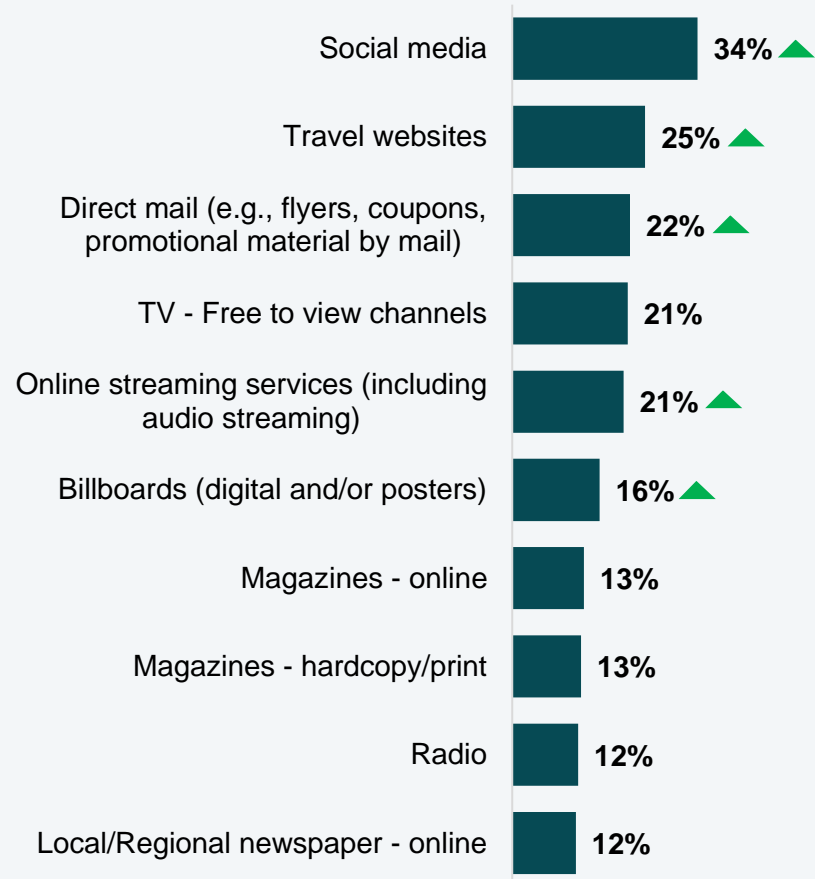
Select Types of Travel Advertising (Trended)

Social media line: 36%, 34%, 28%, 30%, 31%, 31%, 33%, 31%, 30%, 34%, 36%, 37%

Travel websites line: 29%, 28%, 24%, 23%, 24%, 24%, 23%, 23%, 23%, 24%, 26%, 25%

2021 Q1 Q2 Q3 Q4 | 2022 Q1 Q2 Q3 Q4 | 2023 Q1 Q2 Q3 Q4

— Social media   — Travel websites
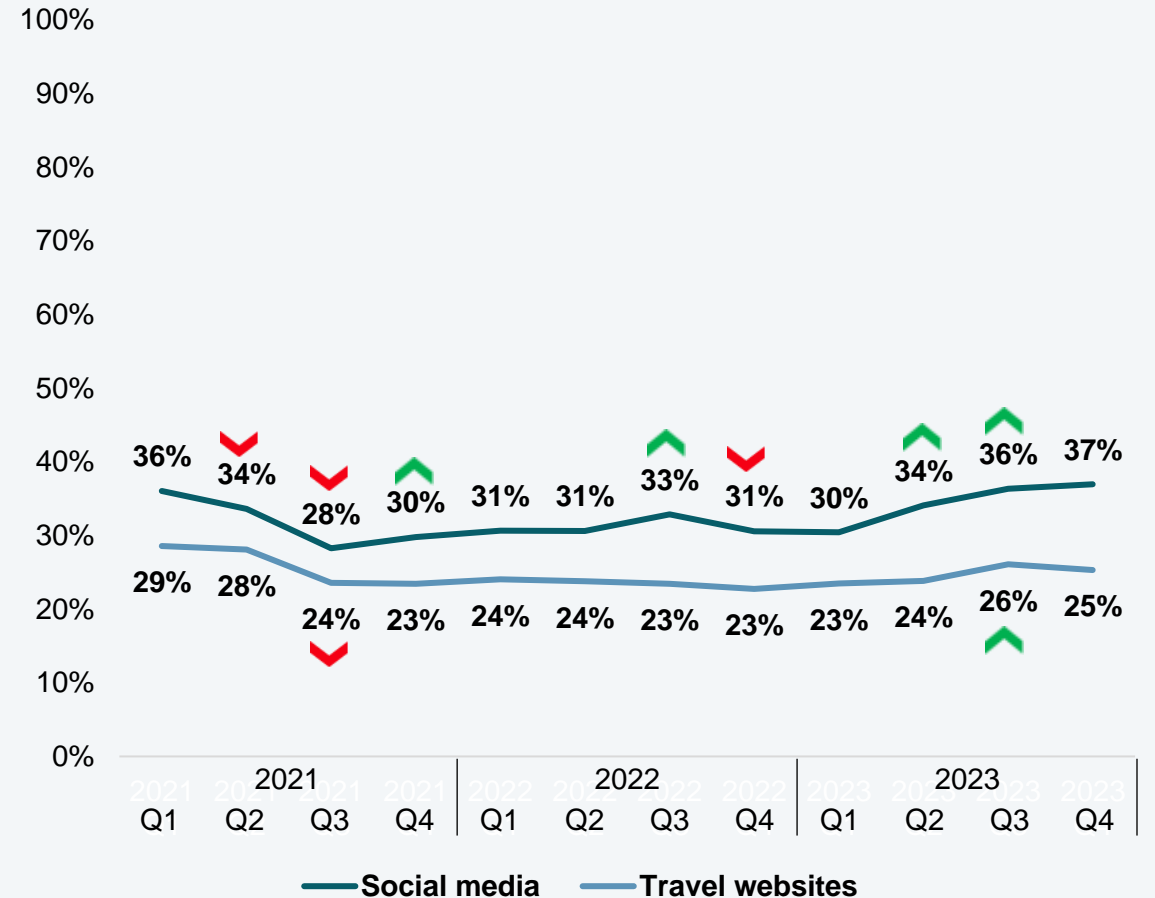
2023 Base: Americans 18+ (n=32,739)
2021-2023 Quarterly Trending Base Range: Americans 18+ (n=2,324-8,604)
Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.

YouGov Global Travel Profiles (United States) – 2023

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

Travel Agents/Tour Operator Usage For Recent Trip

DESTINATION CANADA

Travellers to Canada are significantly more likely to use travel agents/tour operators to help with research and booking. Among those who opt for an agent, the services most used are the booking of accommodations and flights. HVGs are less likely than total US travellers to use a travel agent to book their accommodations.

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

■ Total travellers (n=811) ■ Total HVG travellers (n=48*)

Category	Total travellers	HVG travellers
Booking accommodations	43%	28% ⊖
Booking flights	41%	44%
Researching accommodations	35%	23%
Booking activities to see and do	33%	41%
Researching flights	33%	26%
Researching activities to see and do	31%	31%
Booking ground transportation	28%	40%
Researching potential travel destinations	28%	25%
Researching ground transportation	26%	25%

% Used a travel agent
Total: 23%
HVG: 25%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=811) ■ Travellers to Canada (n=337)

Category	Total travellers	Travellers to Canada
Booking accommodations	43%	42%
Booking flights	41%	44%
Researching accommodations	35%	35%
Booking activities to see and do	33%	34%
Researching flights	33%	33%
Researching activities to see and do	31%	30%
Booking ground transportation	28%	29%
Researching potential travel destinations	28%	30%
Researching ground transportation	26%	29%

% Used a travel agent
Total: 23%
Canada: 41% ⊕

TOTAL U.S.
Booking of accommodations via tour operators and in person at travel agencies has increased compared to 2022

YouGov Global Travel Profiles (United States) – 2023 Base: Total Americans 18+

11

United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Booking Flights For Recent Trip

American travellers and HVGs are most likely to book flights directly with airlines, followed by travel agents and online booking engines. However, the usage of travel agents over indexes for trips to Canada and is the most preferred method for booking flights.

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

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

	Total travellers	Total HVG travellers
Booked directly with the airline(s)	30%	35%
Travel agent/tour operator (NET)	24%	24%
Booked online with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	13%	11%
Booked on the phone with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	11%	12%
Booked in-person with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	10%	9%
Booked online through an online booking engine (e.g. Expedia or Travelocity)	24%	25%
Booked by someone else in the travel party	6%	6%

Total Travellers to Any Destination vs. Total Travellers to Canada

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

	Total travellers	Travellers to Canada
Booked directly with the airline(s)	30%	31%
Travel agent/tour operator (NET)	24%	44% ➕
Booked online with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	13%	26% ➕
Booked on the phone with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	11%	20% ➕
Booked in-person with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	10%	19% ➕
Booked online through an online booking engine (e.g. Expedia or Travelocity)	24%	30% ➕
Booked by someone else in the travel party	6%	7%

Base: Out of state pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=3625); HVG (n=232); Travellers to Canada (n=831)
F12. How did you book your flight for this trip? (Select all that apply)

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Booking Accommodations For Recent Trip

American travellers and HVGs are most likely to book accommodations directly with the establishment and online booking engines. Travellers to Canada are most likely to book though travel agents/tour operators and over index on most methods.

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

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

	Total travellers	Total HVG travellers
Booked directly with the lodging/accommodation establishment	29%	31%
Booked online through an online booking engine (e.g. Expedia or Travelocity)	26%	23%
Travel agent/tour operator (NET)	22%	22%
Booked online with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	11%	11%
Booked in-person with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	9%	8%
Booked on the phone with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	9%	10%
Booked through accommodation sharing services website (e.g. Airbnb)	14%	17%
Booked by someone else in the travel party	9%	10%
Booked through a visitors information centre at the destination	6%	5%

Total Travellers to Any Destination vs. Total Travellers to Canada

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

	Total travellers	Travellers to Canada
Booked directly with the lodging/accommodation establishment	29%	30%
Booked online through an online booking engine (e.g. Expedia or Travelocity)	26%	32% ➕
Travel agent/tour operator (NET)	22%	38% ➕
Booked online with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	11%	22% ➕
Booked in-person with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	9%	16% ➕
Booked on the phone with a travel agent/tour operator (e.g. Collette Vacations or Liberty Travel)	9%	16% ➕
Booked through accommodation sharing services website (e.g. Airbnb)	14%	17% ➕
Booked by someone else in the travel party	9%	8%
Booked through a visitors information centre at the destination	6%	12% ➕

➕ / ➖ = significantly higher/lower result (vs. Total)

Impact of Extreme Weather Events on Travel Plans

Extreme weather events are a concern for the majority of Americans and among HVGs.

% Top 2 box

68%	71%

- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not concerned at all

Total United States
- 26%
- 41%
- 24%
- 8%

HVG Audience
- 21%
- 50%
- 18%
- 10%
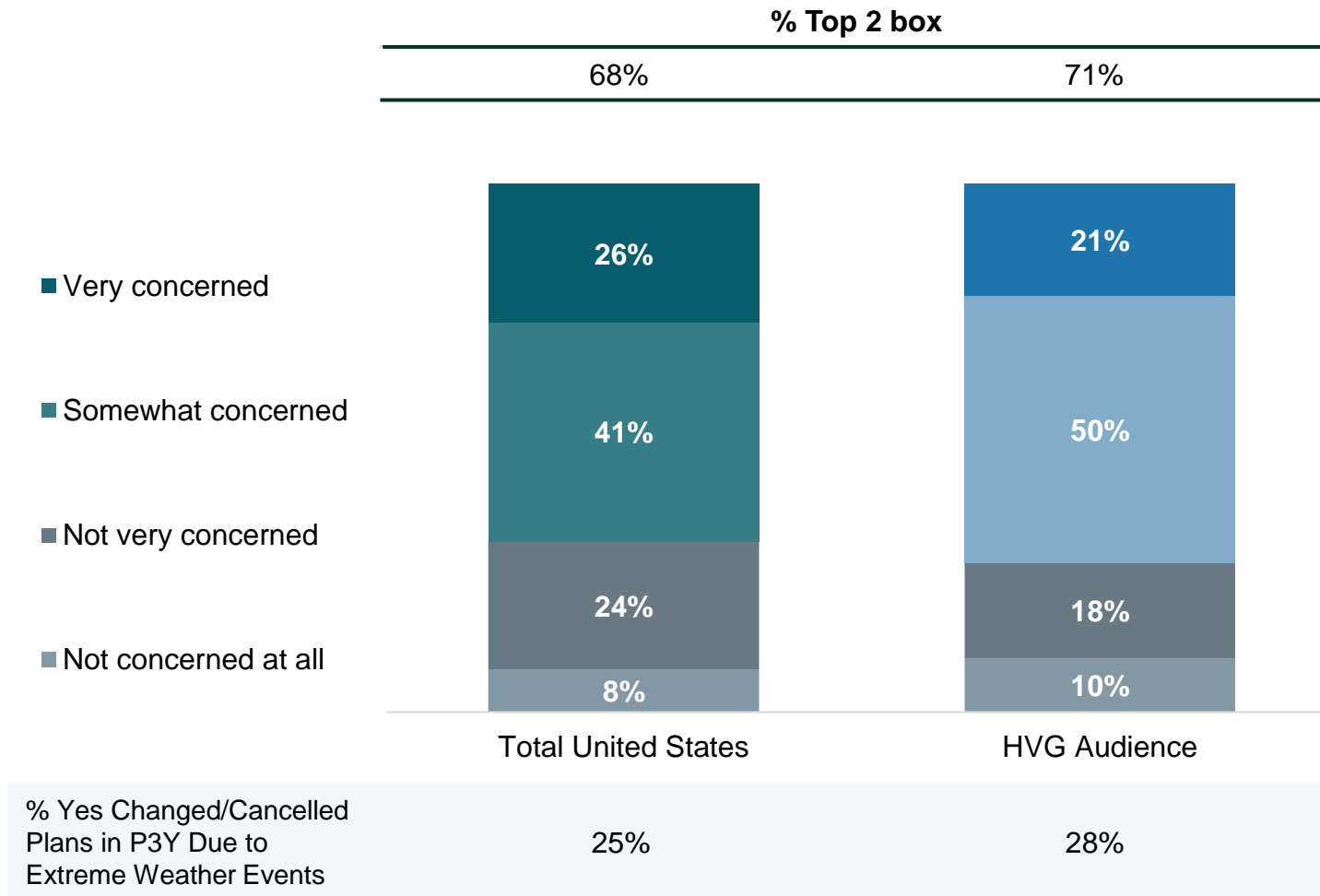
State Insight:
Extreme weather is somewhat more of a concern to travellers originating in NY/NJ (75%) and CA (72%)

% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	25%	28%

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.

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=2066); HVG (n=136)
D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

United States GTRP – December 2023

● / ● = significantly higher/lower result (vs. Total)

Impact of International Conflicts & Unrest on Travel Plans

DESTINATION CANADA

International conflicts are of similar concern. One in five have cancelled plans in the past three years on account of an international conflict.

% Top 2 box

70%	67%

- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not concerned at all

	Total United States	HVG Audience
Very concerned	32%	25%
Somewhat concerned	37%	42%
Not very concerned	19%	21%
Not concerned at all	12%	12%

	Total United States	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to International Conflicts	20%	19%
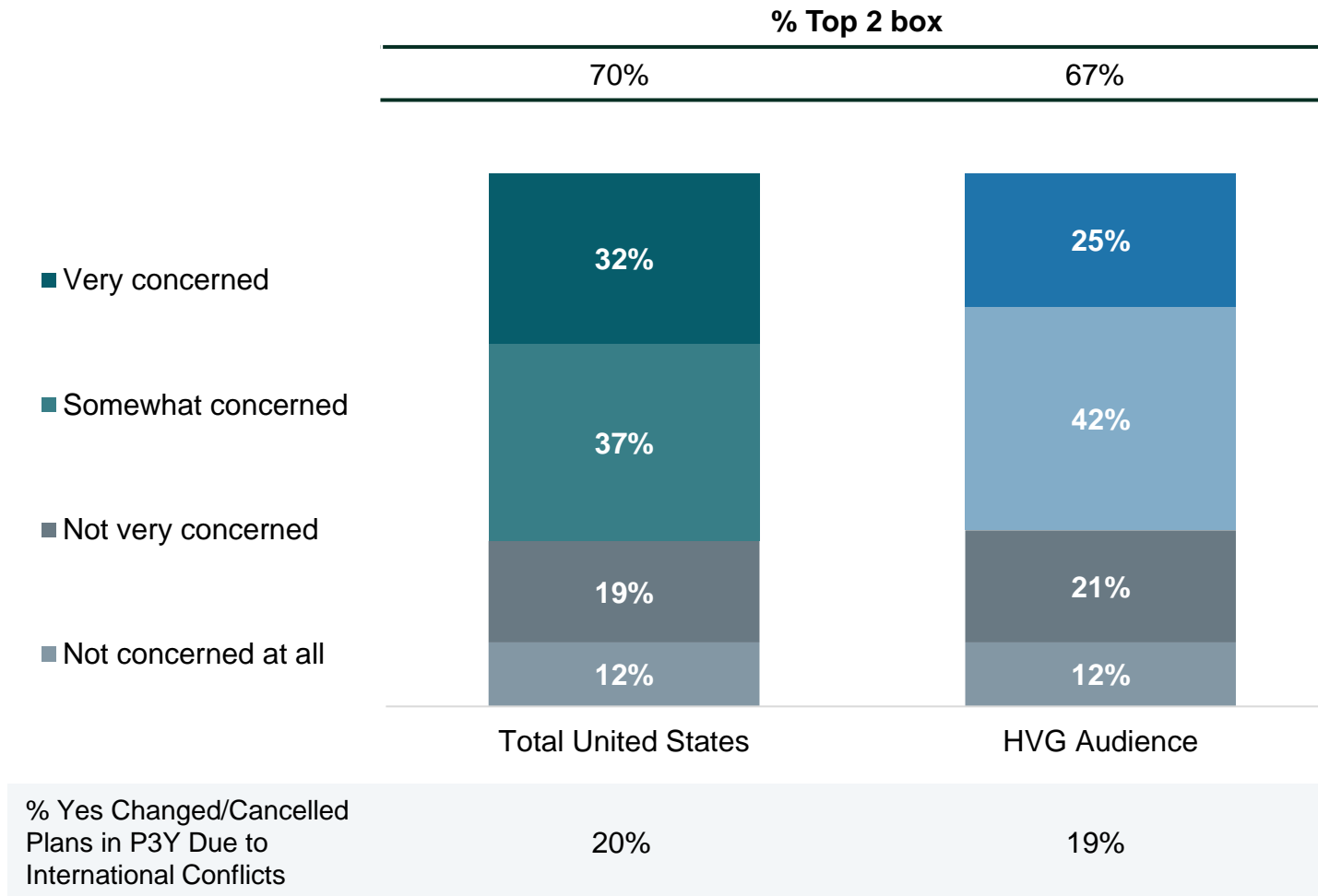
International Conflicts Description

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

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=2105); HVG (n=124)
D12. [DESCRIPTION] How concerned are you about international conflicts or unrest affecting your travel plans?
D13. In the past 3 years, have you ever had to change plans or cancel a trip due to international conflicts or unrest?

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Canada vs. Competitive Destinations

DESTINATION CANADA

Peggy's Cove
Nova Scotia

Past Visitation

Canada ranks first in terms of international destinations ever visited by Americans, and is tied with Mexico/Caribbean. HVGs are more likely to have travelled to Canada as well as to the Mid-Atlantic, Europe, New England and Hawaii.

DESTINATION CANADA

	Total United States			**HVG Audience**		
	■ Visited more than 3 years ago	■ Visited in the past 3 years	*Ever visit*			
Florida & the South	39%	47%	**85%**	40%	42%	**82%**
Mid-Atlantic	38%	41%	**79%**	37%	48% ⊕	**85%** ⊕
Texas & the Southwest	41%	35%	**76%**	41%	36%	**77%**
California	44%	31%	**74%**	51% ⊕	27%	**78%**
Midwest	34%	33%	**67%**	37%	20% ⊖	**58%** ⊖
Canada	44%	20%	**64%**	47%	24%	**71%** ⊕
Mexico or the Caribbean	42%	22%	**64%**	45%	23%	**68%**
Europe	35%	23%	**58%**	40%	25%	**66%** ⊕
New England	34%	24%	**58%**	39%	27%	**66%** ⊕
Rocky Mountains	35%	23%	**57%**	43% ⊕	15% ⊖	**58%**
Pacific Northwest	32%	20%	**52%**	38%	20%	**57%**
Hawaii	27%	14%	**42%**	34% ⊕	16%	**50%** ⊕
Alaska	20%	11%	**31%**	22%	10%	**32%**
Other	28%	16%	**44%**	33%	15%	**48%**

State Insight: *NY/NJ (27%) and CA (25%) more likely to have visited Canada in P3Y vs. TX (17%) or South (18%)*
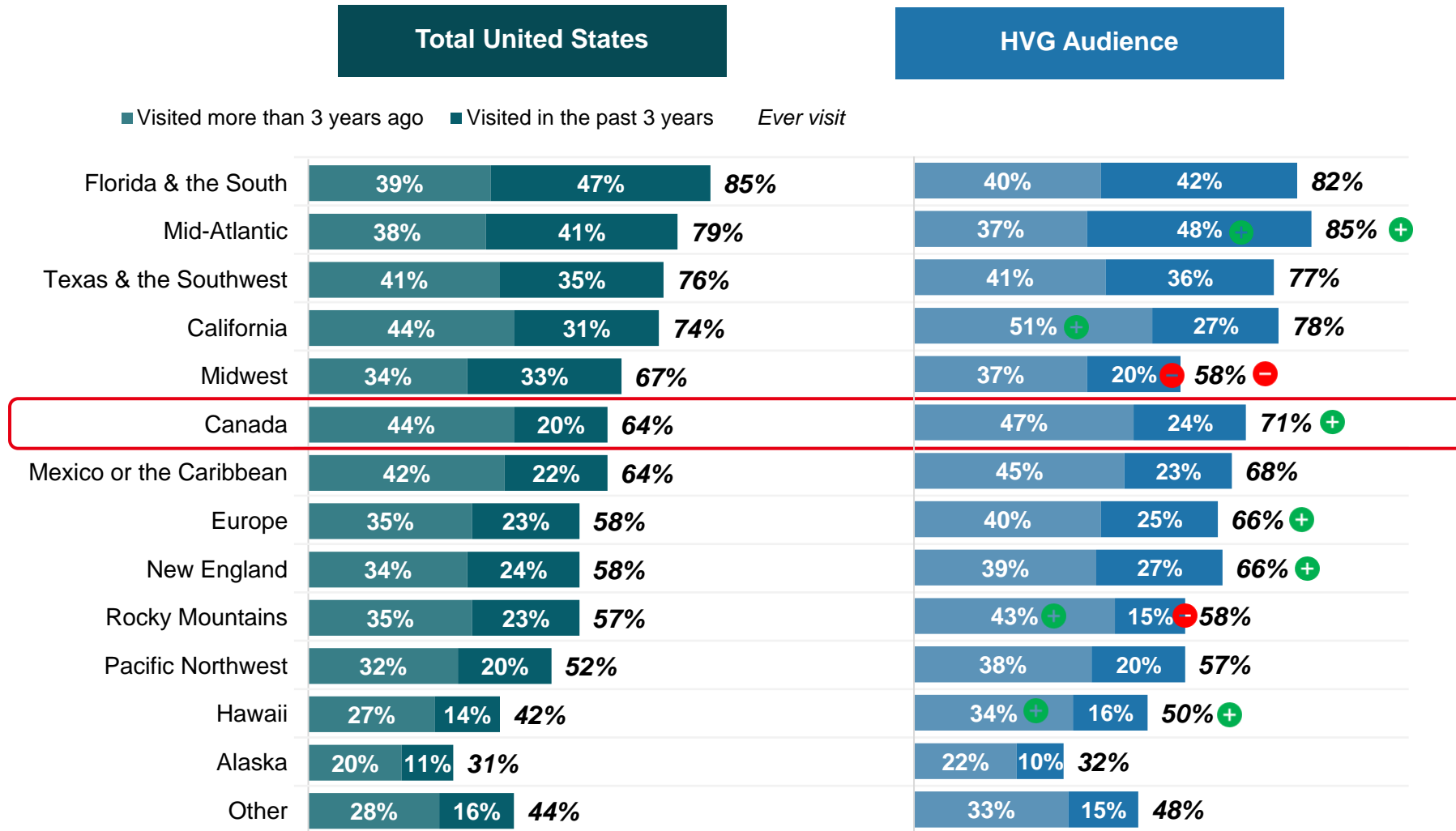
Florida & the South = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia | Mid-Atlantic = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
Texas & the Southwest = e.g. Arizona, Nevada, New Mexico, Utah| Midwest = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
New 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)
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?

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Number of Visits <u>Ever</u> & Time of Year Visited Canada

DESTINATION CANADA

Over one half of those who have ever visited Canada have made 3+ trips. Travel to Canada was concentrated in the late Spring, Summer and early Fall.

■ Total Travellers ■ Total HVG Travellers

1 time
- 26%
- 30%

2 times
- 21%
- 23%

3+ times
- 53%
- 47%

■ Total Travellers ■ Total HVG Travellers

Month	Total Travellers	Total HVG Travellers
December	12%	10%
January	12%	12%
February	12%	14%
March	14%	13%
April	15%	12%
May	22%	19%
June	33%	29%
July	33%	24% 🔴
August	30%	24%
September	22%	26%
October	16%	15%
November	12%	10%
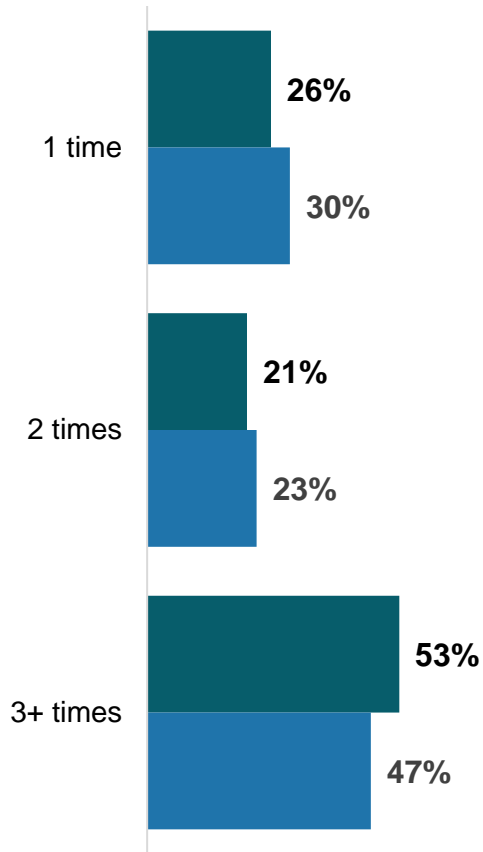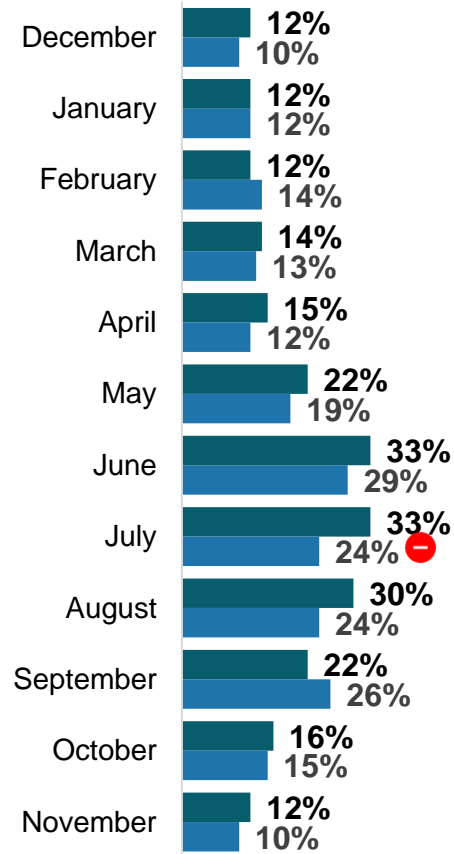
	Total Travellers	Total HVG Travellers
Winter	25%	26%
Spring	38%	35%
Summer	63%	55% 🔴
Fall	35%	36%

Base: Out of state pleasure travellers (past 3 years or next 2 years)
F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=2346); HVG (n=155)
F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=2743); HVG (n=183)

United States GTRP – December 2023

🟢 / 🔴 = significantly higher/lower result (vs. Total)

Net Promoter Score (NPS)

Although not as high as Europe, Hawaii and Alaska, Canada's NPS score surpasses most domestic destinations.
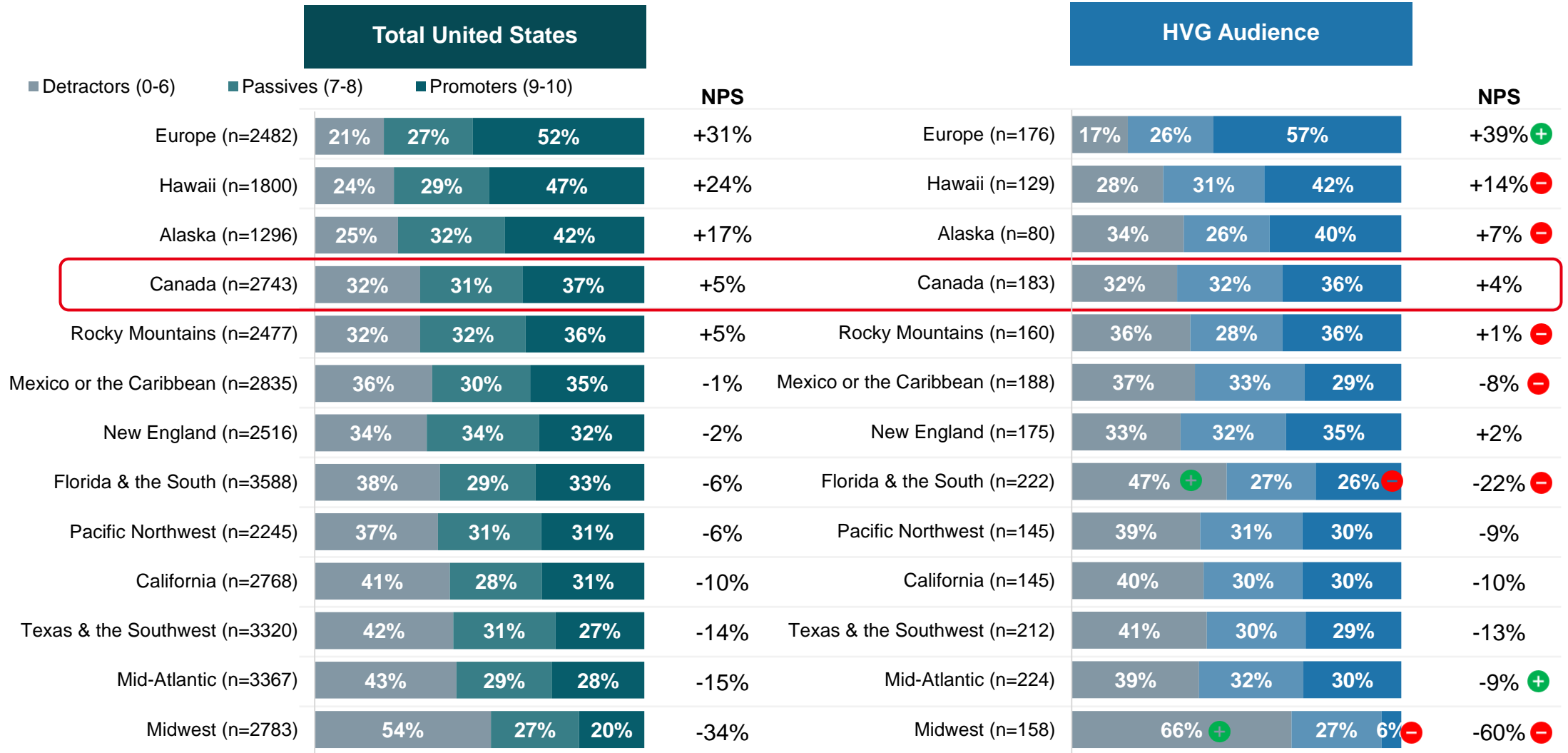
Legend: ■ Detractors (0-6) ■ Passives (7-8) ■ Promoters (9-10)

Total United States	Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS	HVG Audience	Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS
Europe (n=2482)	21%	27%	52%	+31%	Europe (n=176)	17%	26%	57%	+39% 🟢
Hawaii (n=1800)	24%	29%	47%	+24%	Hawaii (n=129)	28%	31%	42%	+14% 🔴
Alaska (n=1296)	25%	32%	42%	+17%	Alaska (n=80)	34%	26%	40%	+7% 🔴
Canada (n=2743)	32%	31%	37%	+5%	Canada (n=183)	32%	32%	36%	+4%
Rocky Mountains (n=2477)	32%	32%	36%	+5%	Rocky Mountains (n=160)	36%	28%	36%	+1% 🔴
Mexico or the Caribbean (n=2835)	36%	30%	35%	-1%	Mexico or the Caribbean (n=188)	37%	33%	29%	-8% 🔴
New England (n=2516)	34%	34%	32%	-2%	New England (n=175)	33%	32%	35%	+2%
Florida & the South (n=3588)	38%	29%	33%	-6%	Florida & the South (n=222)	47% 🟢	27%	26% 🔴	-22% 🔴
Pacific Northwest (n=2245)	37%	31%	31%	-6%	Pacific Northwest (n=145)	39%	31%	30%	-9%
California (n=2768)	41%	28%	31%	-10%	California (n=145)	40%	30%	30%	-10%
Texas & the Southwest (n=3320)	42%	31%	27%	-14%	Texas & the Southwest (n=212)	41%	30%	29%	-13%
Mid-Atlantic (n=3367)	43%	29%	28%	-15%	Mid-Atlantic (n=224)	39%	32%	30%	-9% 🟢
Midwest (n=2783)	54%	27%	20%	-34%	Midwest (n=158)	66% 🟢	27%	6% 🔴	-60% 🔴

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)

Canada Net Promoter Score (NPS) by Season

DESTINATION CANADA

Canada's NPS is highest among those who have ever visited in the Winter and Fall.

	Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS
Visited Canada …				
In the Spring (n=1037)	31%	32%	37%	+6%
In the Summer (n=1743)	32%	31%	37%	+4%
In the Fall (n=993)	29%	30%	41%	+13%
In the Winter (n=664)	27%	29%	45%	+18%
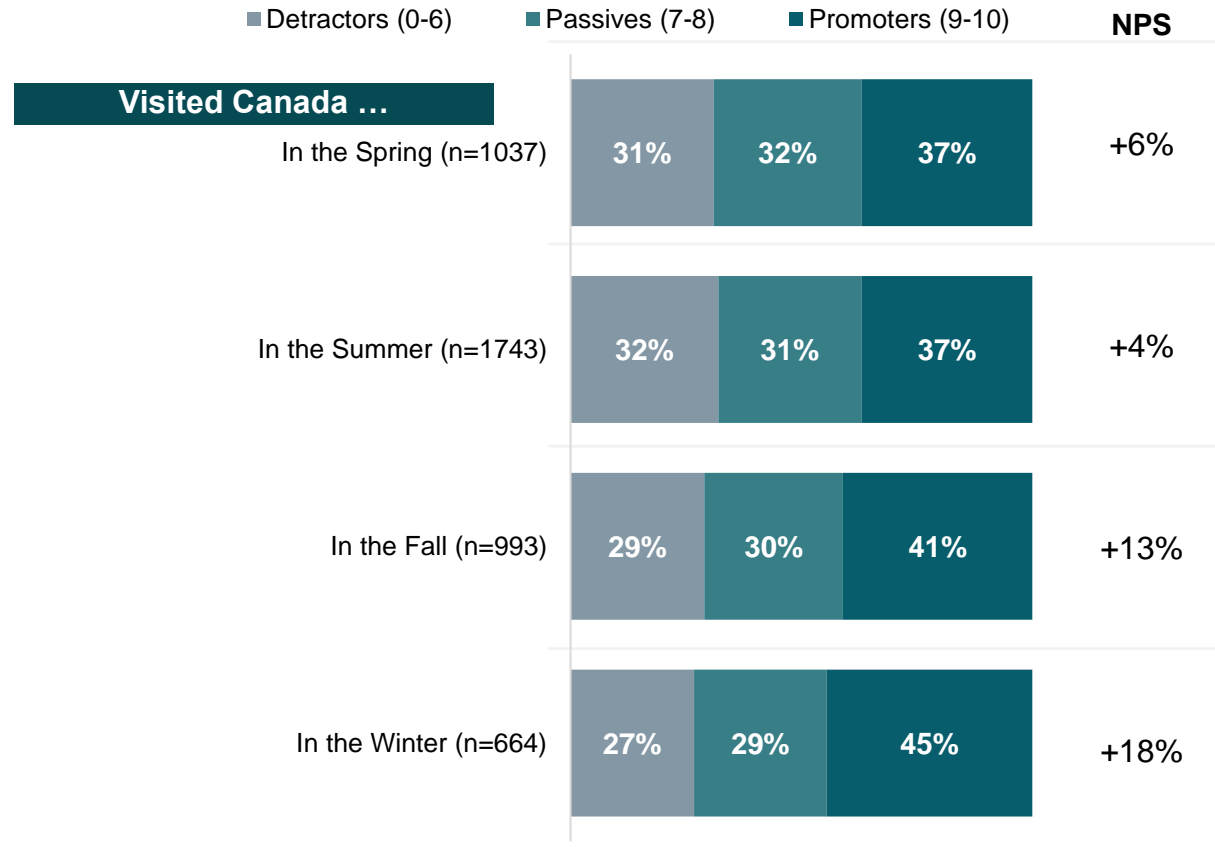
State Insight:
Canada's NPS is highest among those travelling from CA (+15%) followed by NY/NJ (9%), South (7%) and Texas (1%)

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 Canada
C8. How likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?
F20. What time of year have you ever visited Canada? Select all that apply.

United States GTRP – December 2023

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

Performance Scorecard for Canada

__Among Total Americans__, Canada performed well in 2023, ranking 1st (out of 9 __international destinations__) in three of eight key performance metrics and within the top two in seven of eight metrics. While Canada saw scores decrease year-over-year in multiple metrics, it was also a theme seen across competitors. Of note: Italy was the only competitor to see an increase in ad awareness year-over-year and may have been a contributing factor in Italy overtaking Canada in both consideration and positive recommend.

Total Impression	**Consideration**	**Positive Recommend**	**Destination Health Index**
57% ▼	**23%**	**35%** ▼	**36%** ▼
Ranks **1st** *(out of 9)*	Ranks **2nd** *(out of 9)*	Ranks **2nd** *(out of 9)*	Ranks **1st** *(out of 9)*
	(Behind: IT)	(Behind: IT)	

Positive Reputation	**Positive Buzz**	**Ad Awareness**	**Word of Mouth**
37% ▼	**17%** ▼	**8%**	**15%**
Ranks **4th** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **2nd** *(out of 9)*	Ranks **2nd** *(out of 9)*
(Behind: IT, FR, AU)		(Behind: MX)	(Behind: MX)
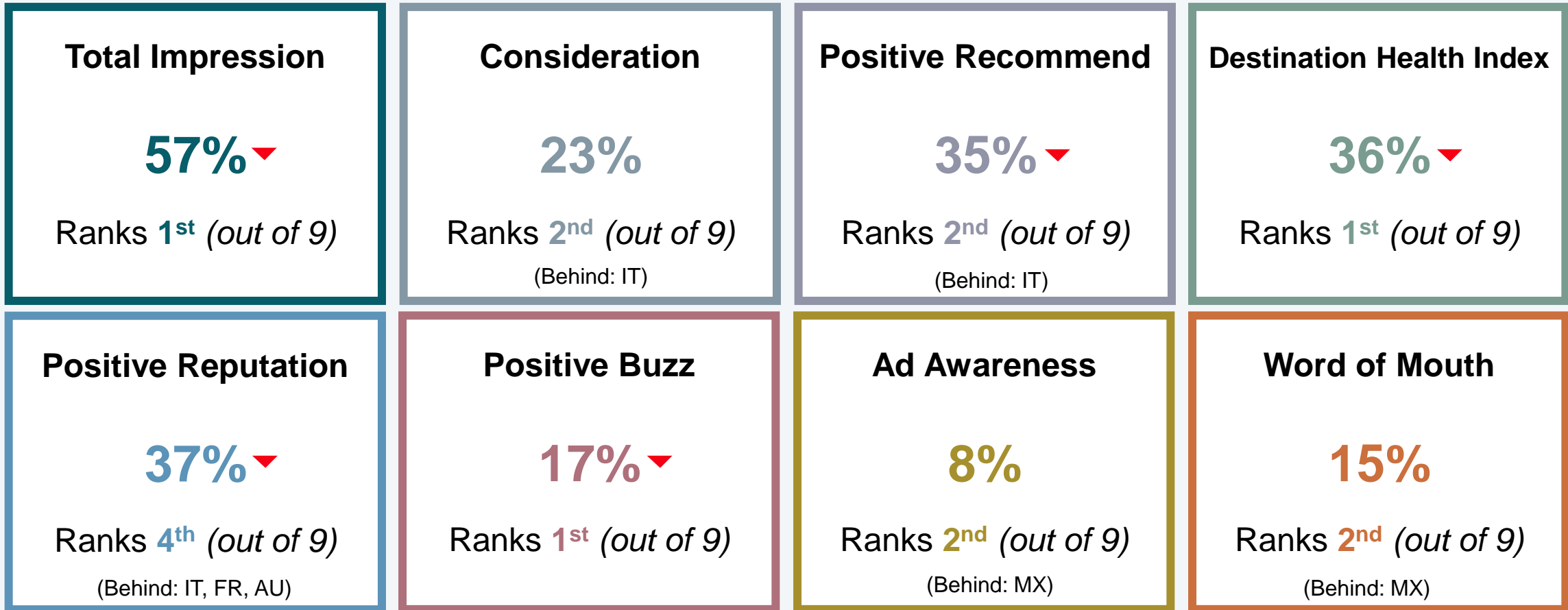
TOTAL U.S.
Competitive set: Italy, UK, France, Spain, Australia, Germany, Mexico, China

Base: Americans 18+ (n=28,817)

YouGov DestinationIndex (United States) – 2023

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

Unaided Destination Consideration (Next 2 Years)

DESTINATION CANADA

Unprompted, one in twenty American travellers and HVGs mention Canada as a destination they are seriously considering in the next 2 years. The preference for domestic travel is evident with the states of Florida, California and New York being the most mentioned.

Top Destination Brands[1]

■ Total United States   ■ HVG Audience

Destination	Total United States	HVG Audience
Florida	13%	13%
California	9%	6%
New York	8%	6%
Hawaii	5%	5%
Canada	**5%**	**4%**
Texas	5%	5%
Las Vegas	4%	4%
Colorado	4%	4%
Mexico	3%	4%
Italy	3%	5%
Washington DC	3%	4%
France	3%	2%
Arizona	3%	5%

Top Destinations[2]

■ Total United States   ■ HVG Audience

Destination	Total United States	HVG Audience
Florida	16%	14%
California	12%	8% ⊖
New York	10%	9%
Canada	**7%**	**6%**
Nevada	6%	6%
Hawaii	6%	5%
Texas	5%	5%
United Kingdom	4%	4%
Colorado	4%	4%
Washington	4%	4%
France	4%	3%
Mexico	4%	4%
Arizona	4%	6%
Italy	4%	5%

[1] Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
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)

United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Consideration Funnels: Total US Travellers

Nearly four in ten (38%) American travellers are seriously considering a trip to Canada in the next two years. This is comparable to destinations such as Mexico/Caribbean, Rocky Mountains, New England and the Midwest. At 54%, Florida has the largest number followed by the Mid-Atlantic (48%).

Funnel legend (top to bottom):
- Committed
- Actively Planning
- Consider to Purchase
- Dream to Purchase
- Familiar

DESTINATION CANADA

Canada
- 5%
- 16% (31%)
- 38% (42%)
- 71% (54%)
- 87% (82%)

Florida & the South
- 12%
- 26% (44%)
- 54% (49%)
- 76% (71%)
- 95% (79%)

Mid-Atlantic
- 8%
- 22% (35%)
- 48% (47%)
- 71% (67%)
- 92% (77%)

Texas & the Southwest
- 6%
- 20% (30%)
- 41% (48%)
- 67% (61%)
- 92% (73%)

California*
- 6%
- 20% (30%)
- 41% (48%)
- 70% (58%)
- 92% (76%)

Europe
- 6%
- 22% (27%)
- 45% (50%)
- 80% (56%)
- 90% (90%)

Hawaii*
- 4%
- 16% (29%)
- 34% (46%)
- 74% (46%)
- 90% (82%)

Mexico or the Caribbean
- 6%
- 18% (35%)
- 38% (48%)
- 69% (55%)
- 90% (77%)

Rocky Mountains
- 4%
- 17% (27%)
- 38% (44%)
- 68% (56%)
- 89% (76%)

New England
- 5%
- 17% (29%)
- 38% (46%)
- 65% (58%)
- 88% (74%)

Midwest
- 6%
- 18% (33%)
- 37% (49%)
- 55% (67%)
- 86% (64%)

Pacific Northwest
- 5%
- 15% (30%)
- 32% (47%)
- 61% (53%)
- 84% (72%)

Alaska*
- 3%
- 14% (23%)
- 28% (49%)
- 66% (43%)
- 83% (79%)

United States GTRP – December 2023

Consideration Funnels: Among HVG Audience

Canada's funnel is similar among HVGs, with consideration comparable to the Rocky Mountains and New England. Of note, serious consideration for Europe and Mexico or the Caribbean is significantly higher compared to total travellers.

Legend (top to bottom):
- Committed
- Actively Planning
- Consider to Purchase
- Dream to Purchase
- Familiar

DESTINATION CANADA

Canada
- 29% / 4%
- 43% / 15%
- 53% / 35%
- 75% / 65%
- 86%

Florida & the South
- 45% / 8%
- 34% / 17%
- 80% / 50%
- 68% / 62%
- 91%

Mid-Atlantic
- 25% / 7%
- 53% / 26%
- 80% / 49%
- 67% / 61%
- 91%

Texas & the Southwest
- 21% / 4%
- 41% / 18%
- 68% / 43%
- 68% / 64%
- 94%

California*
- 29% / 3%
- 34% / 10%
- 43% / 29%
- 72% / 68%
- 95%

Europe
- 28% / 9%
- 55% / 33%
- 69% / 59%
- 95% / 86%
- 91%

Hawaii*
- 0% / 0%
- 31% / 7%
- 37% / 23%
- 68% / 61%
- 90%

Mexico or the Caribbean
- 38% / 7%
- 38% / 18%
- 67% / 48%
- 80% / 71%
- 90%

Rocky Mountains
- 56% / 8%
- 38% / 14%
- 59% / 35%
- 74% / 60%
- 82%

New England
- 29% / 5%
- 46% / 16%
- 60% / 34%
- 63% / 57%
- 91%

Midwest
- 0% / 0%
- 53% / 13%
- 53% / 25%
- 62% / 48%
- 77%

Pacific Northwest
- 37% / 6%
- 50% / 15%
- 49% / 29%
- 71% / 60%
- 85%

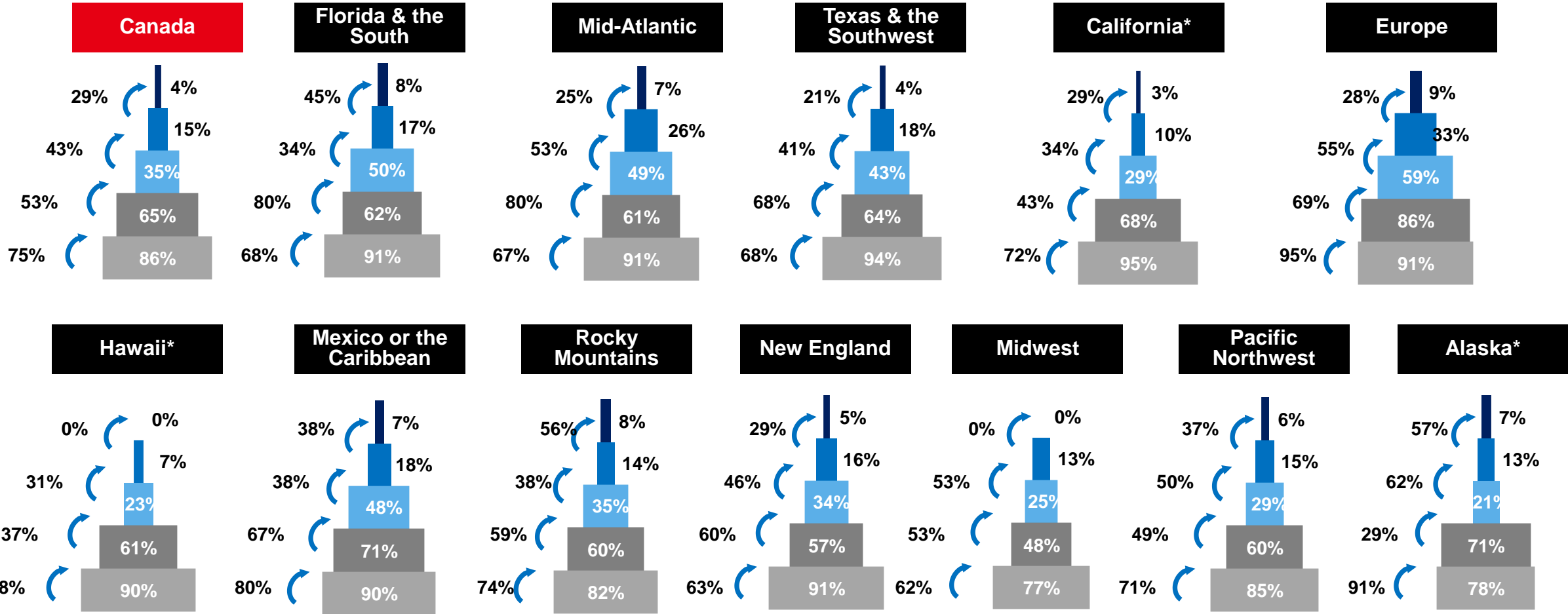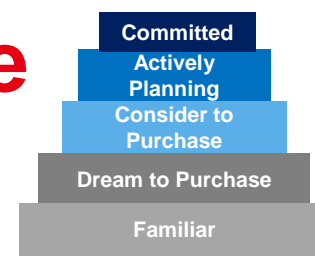## Alaska*
- 57% / 7%
- 62% / 13%
- 29% / 21%
- 91% / 71%
- 78%

*Respondents who lived in [STATE] did not evaluate [STATE]
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]
See notes for question wording and funnel definitions

Destination Consideration By Seasons

In the Winter, Americans lean towards warmer destinations such as Mexico/Caribbean, Florida and the South, California, Hawaii and Texas and the Southwest. The Fall is a more neutral season with New England a top pick.
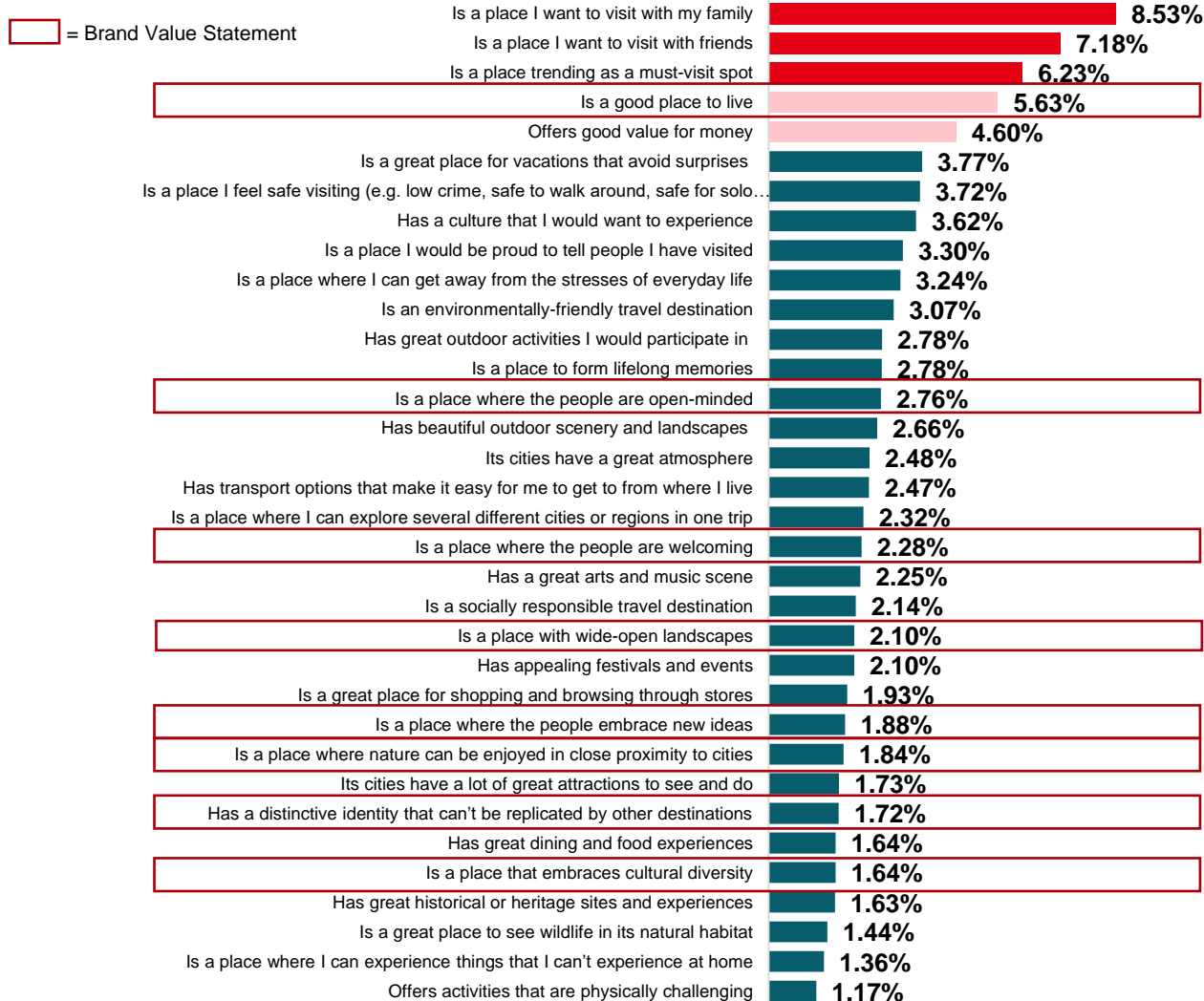
Total United States	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
New England (n=687)	29%	47%	55%	**59%**
Mid-Atlantic (n=732)	37%	55%	57%	52%
Florida & the South (n=789)	**51%**	59%	41%	50%
Midwest (n=547)	35%	55%	59%	50%
Rocky Mountains (n=725)	32%	49%	57%	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 [DESTINATON]
C7. For each of the following destinations, during which months would you consider taking a vacation trip <u>in the next 2 years</u>?
*Small base size, interpret with caution (n<50)

United States GTRP – December 2023

🟢 / 🔴 = significantly higher/lower result (vs. Total)

Destination Attributes: Drivers Analysis

The most influential aspects of consideration are: being a place I want to visit with my family/friends, trending as a must-visit spot, a good place to live and value for money. Is a good place to live is the brand value statement with the greatest influence as most others fall towards the bottom of the list (except is a place where people are open-minded).

DESTINATION CANADA

☐ = Brand Value Statement

Attribute	Value
Is a place I want to visit with my family	8.53%
Is a place I want to visit with friends	7.18%
Is a place trending as a must-visit spot	6.23%
Is a good place to live	5.63%
Offers good value for money	4.60%
Is a great place for vacations that avoid surprises	3.77%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo…	3.72%
Has a culture that I would want to experience	3.62%
Is a place I would be proud to tell people I have visited	3.30%
Is a place where I can get away from the stresses of everyday life	3.24%
Is an environmentally-friendly travel destination	3.07%
Has great outdoor activities I would participate in	2.78%
Is a place to form lifelong memories	2.78%
Is a place where the people are open-minded	2.76%
Has beautiful outdoor scenery and landscapes	2.66%
Its cities have a great atmosphere	2.48%
Has transport options that make it easy for me to get to from where I live	2.47%
Is a place where I can explore several different cities or regions in one trip	2.32%
Is a place where the people are welcoming	2.28%
Has a great arts and music scene	2.25%
Is a socially responsible travel destination	2.14%
Is a place with wide-open landscapes	2.10%
Has appealing festivals and events	2.10%
Is a great place for shopping and browsing through stores	1.93%
Is a place where the people embrace new ideas	1.88%
Is a place where nature can be enjoyed in close proximity to cities	1.84%
Its cities have a lot of great attractions to see and do	1.73%
Has a distinctive identity that can't be replicated by other destinations	1.72%
Has great dining and food experiences	1.64%
Is a place that embraces cultural diversity	1.64%
Has great historical or heritage sites and experiences	1.63%
Is a great place to see wildlife in its natural habitat	1.44%
Is a place where I can experience things that I can't experience at home	1.36%
Offers activities that are physically challenging	1.17%

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%.

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)
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.

United States GTRP – December 2023

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

Canada stands out as a safe destination but there are several dimensions that represent white space as no one destination dominates them.

DESTINATION CANADA

Attribute	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
Higher Order Motivations													
Is a place where I can get away from the stresses of everyday life			W							S	S	S	
Is a place to form lifelong memories													
Is a place I would be proud to tell people I have visited										S			
General Needs													
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	S											W	
Is a place where I can explore several different cities or regions in one trip			S							W	W	W	S
Offers good value for money				S	S				W		W	S	
Has transport options that make it easy for me to get to from where I live			S							W	W		
Type of Trip													
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					S								
Is a place where I can experience things that I can't experience at home						W				S		S	
Is an environmentally-friendly travel destination													
Is a socially responsible travel destination													
Is a place trending as a must-visit spot													
To-Do													
Offers activities that are physically challenging			W			S				S			W
Is a great place for shopping and browsing through stores			S			W			S	W			
Its cities have a lot of great attractions to see and do			S			W				W			
Has great outdoor activities I would participate in													
Has great dining and food experiences			S			W				W			
Has a great arts and music scene	W		S			W			S	W			S
Has appealing festivals and events										W			
To-See													
Its cities have a great atmosphere			S							W			S
Has beautiful outdoor scenery and landscapes			W							S			
Is a great place to see wildlife in its natural habitat			W			S				S			
Has great historical or heritage sites and experiences		S	S										
Has a culture that I would want to experience												S	S

Legend: S = Strength (green), W = Weakness (pink)

Strength **Weakness**

United States GTRP – December 2023

DESTINATION CANADA

Among American travellers, Canada does not currently stand out on its brand value statements. Of note is California's edge on embracing cultural diversity, open-mindedness and embracing new ideas.

	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		

Strength / **Weakness**

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.
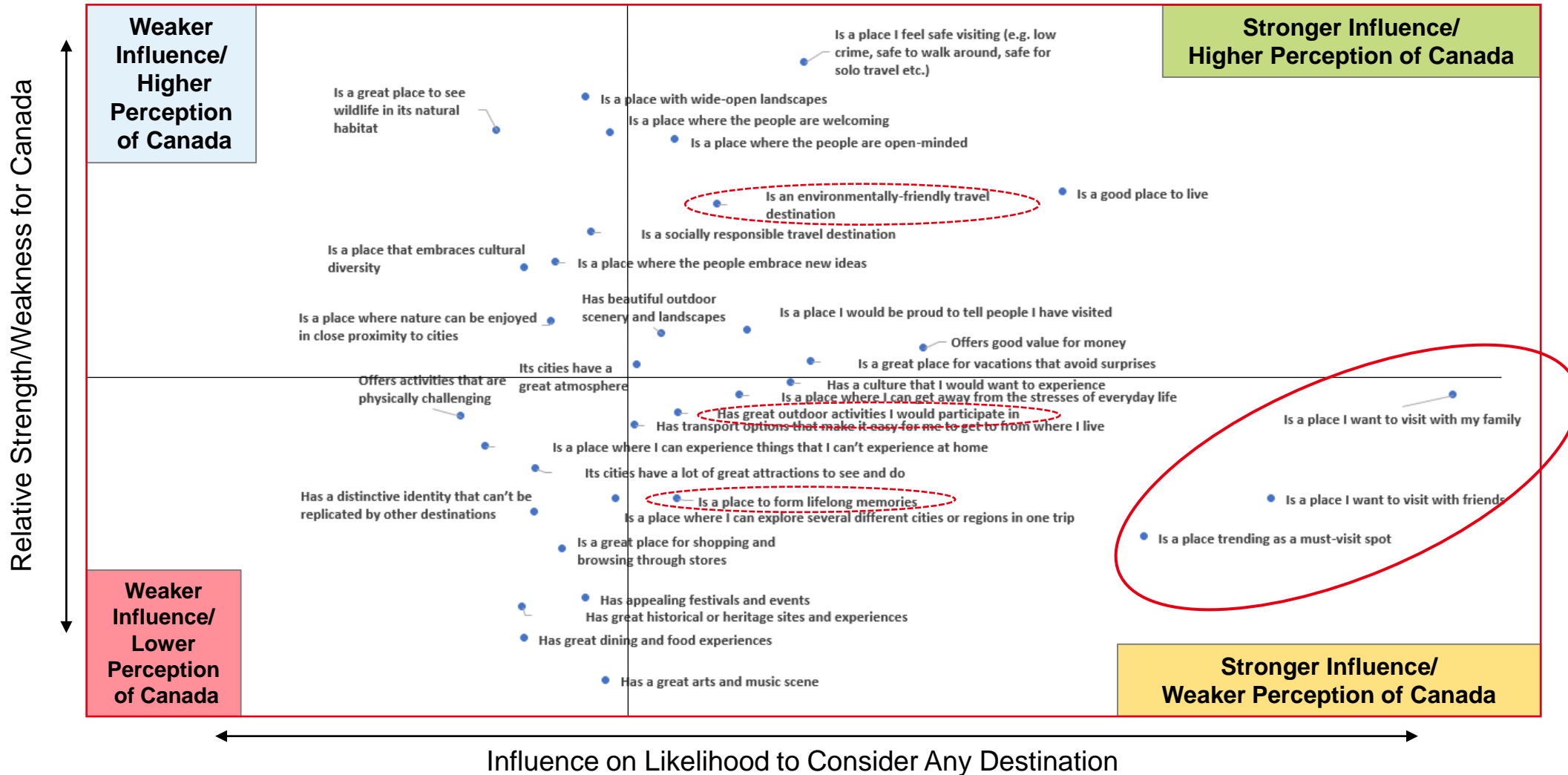Select "None of these" if you think none of the destinations apply.

United States GTRP – December 2023

Canada Strengths & Opportunities: Total US

While Canada is most highly associated with being a safe destination, having wide-open landscapes, wildlife, a welcoming and open-minded nature, there's an opportunity to boost perceptions on the top drivers of consideration such as place I want to visit with friends/family and a place trending as a must-visit spot.

Relative Strength/Weakness for Canada

Weaker Influence/ Higher Perception of Canada

Stronger Influence/ Higher Perception of Canada

Weaker Influence/ Lower Perception of Canada

Stronger Influence/ Weaker Perception of Canada

Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)

Is a great place to see wildlife in its natural habitat

Is a place with wide-open landscapes

Is a place where the people are welcoming

Is a place where the people are open-minded

Is an environmentally-friendly travel destination

Is a good place to live

Is a socially responsible travel destination

Is a place that embraces cultural diversity

Is a place where the people embrace new ideas

Has beautiful outdoor scenery and landscapes

Is a place I would be proud to tell people I have visited

Is a place where nature can be enjoyed in close proximity to cities

Offers good value for money

Its cities have a great atmosphere

Is a great place for vacations that avoid surprises

Offers activities that are physically challenging

Has a culture that I would want to experience

Is a place where I can get away from the stresses of everyday life

Has great outdoor activities I would participate in

Has transport options that make it easy for me to get to from where I live

Is a place I want to visit with my family

Is a place where I can experience things that I can't experience at home

Its cities have a lot of great attractions to see and do

Has a distinctive identity that can't be replicated by other destinations

Is a place to form lifelong memories

Is a place where I can explore several different cities or regions in one trip

Is a place I want to visit with friends

Is a great place for shopping and browsing through stores

Is a place trending as a must-visit spot

Has appealing festivals and events

Has great historical or heritage sites and experiences

Has great dining and food experiences

Has a great arts and music scene

Influence on Likelihood to Consider Any Destination

DESTINATION CANADA

The same top drivers among total American travellers apply to HVGs, as well as being a place where people are welcoming. A secondary driver includes having transport options that make it easy for me to get to from where I live.

☐ = Brand Value Statement

Attribute	Value
Is a place I want to visit with friends	5.25%
Is a place trending as a must-visit spot	4.93%
Is a place where the people are welcoming	4.86%
Is a place I want to visit with my family	4.66%
Has transport options that make it easy for me to get to from where I live	4.34%
Is an environmentally-friendly travel destination	3.71%
Is a place with wide-open landscapes	3.48%
Is a place where I can get away from the stresses of everyday life	3.37%
Is a good place to live	3.33%
Has appealing festivals and events	3.25%
Has a culture that I would want to experience	3.24%
Offers good value for money	3.17%
Has great outdoor activities I would participate in	3.14%
Is a place where the people are open-minded	3.07%
Is a place to form lifelong memories	2.80%
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo…	2.78%
Its cities have a great atmosphere	2.72%
Is a great place to see wildlife in its natural habitat	2.56%
Is a great place for shopping and browsing through stores	2.55%
Is a place where I can explore several different cities or regions in one trip	2.53%
Its cities have a lot of great attractions to see and do	2.47%
Is a place I would be proud to tell people I have visited	2.45%
Has a great arts and music scene	2.44%
Is a great place for vacations that avoid surprises	2.39%
Is a place that embraces cultural diversity	2.34%
Is a place where I can experience things that I can't experience at home	2.32%
Is a place where nature can be enjoyed in close proximity to cities	2.32%
Has a distinctive identity that can't be replicated by other destinations	2.28%
Has great dining and food experiences	2.09%
Offers activities that are physically challenging	2.09%
Is a socially responsible travel destination	2.02%
Has beautiful outdoor scenery and landscapes	1.80%
Is a place where the people embrace new ideas	1.71%
Has great historical or heritage sites and experiences	1.51%

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%.

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Out of state pleasure travellers, HVG audience, (past 3 years or next 2 years)
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.

Among HVGs, Canada stands out as being a safe place to visit and being able to see wildlife in its natural habitat but shares this space with other destinations.

DESTINATION CANADA

Legend: **Strength** (green), **Weakness** (pink)

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

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.

United States GTRP – December 2023

Brand Value Statements: Among HVG Audience

Among HVGs, Canada does stand out more on its brand value statements with a relative strength on having wide-open landscapes, being a place where people are welcoming and being a place where people are open-minded. However, it shares these associations with other destinations. Of note, HVGs score Canada significantly lower than total American travellers on 'distinctive identity'.

	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

Strength (green) **Weakness** (pink)

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 these destinations apply.

United States GTRP – December 2023

The same opportunities apply to HVGs, boosting perceptions of being a place I want to visit with friends and family, and being a place trending as must-visit. Improving perceptions of being a place where people are welcoming and having transport options that make it easy for me to get to from where I live could also boost consideration.

Quadrant labels:
- Weaker Influence/ Higher Perception of Canada
- Stronger Influence/ Higher Perception of Canada
- Weaker Influence/ Lower Perception of Canada
- Stronger Influence/ Weaker Perception of Canada

Y-axis: Relative Strength/Weakness for Canada
X-axis: Influence on Likelihood to Consider Any Destination

Attribute labels:
- Is a place where the people are welcoming
- Is a place where the people are open-minded
- Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)
- Is a great place to see wildlife in its natural habitat
- Is a place with wide-open landscapes
- Is a good place to live
- Is a place where the people embrace new ideas
- Its cities have a great atmosphere
- Is an environmentally-friendly travel destination
- Is a socially responsible travel destination
- Has a culture that I would want to experience
- Is a place that embraces cultural diversity
- Has transport options that make it easy for me to get to from where I live
- Is a place where nature can be enjoyed in close proximity to cities
- Offers good value for money
- Is a place I want to visit with friends
- Is a place where I can experience things that I can't experience at home
- Is a place where I can get away from the stresses of everyday life
- Is a place I want to visit with my family
- Has beautiful outdoor scenery and landscapes
- Has great outdoor activities I would participate in
- Offers activities that are physically challenging
- Is a place to form lifelong memories
- Is a great place for vacations that avoid surprises
- Is a place where I can explore several different cities or regions in one trip
- Its cities have a lot of great attractions to see and do
- Is a great place for shopping and browsing through stores
- Has a great arts and music scene
- Has great historical or heritage sites and experiences
- Has appealing festivals and events
- Is a place trending as a must-visit spot
- Has a distinctive identity that can't be replicated by other destinations
- Is a place I would be proud to tell people I have visited
- Has great dining and food experiences

Increasing Fall/Winter Visitation

Aurora Borealis, Yellowknife
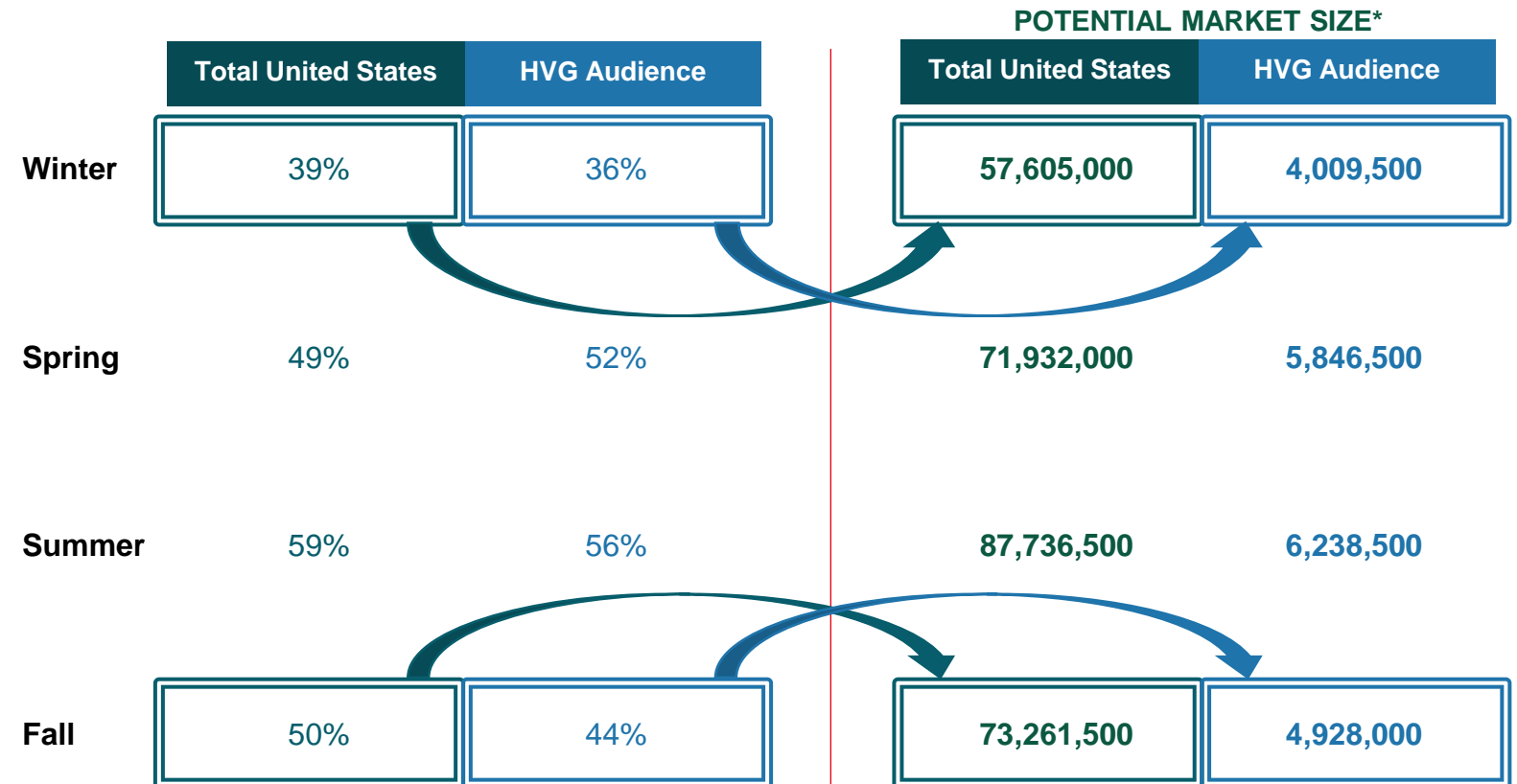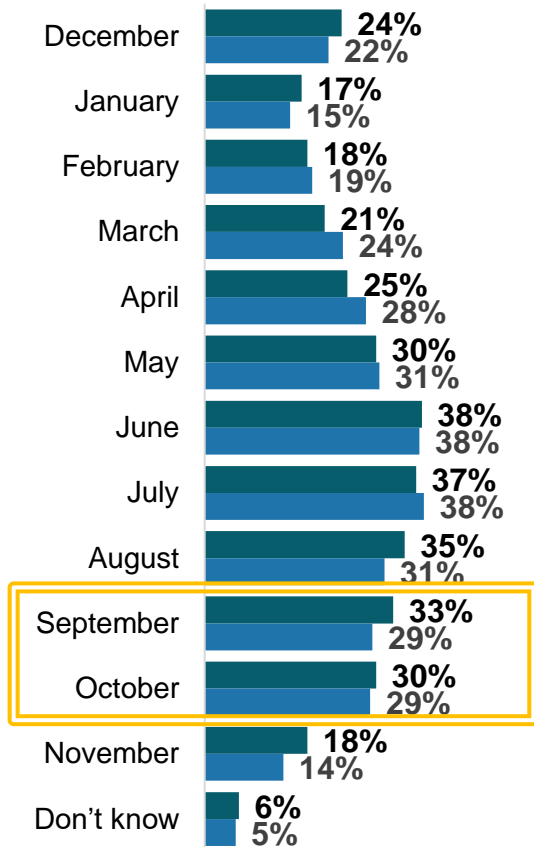*Northwest Territories*

Demand by Season (Any Destination)

DESTINATION CANADA

Fall represents a sizable opportunity with 73.3M Americans and 4.8M HVGs who typically travel during those months, travel is more common during Sept/Oct. During winter months, 57.6M Americans and 4.0M HVGs typically travel.

■ Total United States ■ HVG Audience

Month	Total United States	HVG Audience
December	24%	22%
January	17%	15%
February	18%	19%
March	21%	24%
April	25%	28%
May	30%	31%
June	38%	38%
July	37%	38%
August	35%	31%
September	33%	29%
October	30%	29%
November	18%	14%
Don't know	6%	5%

POTENTIAL MARKET SIZE*

Season	Total United States	HVG Audience	Total United States	HVG Audience
Winter	39%	36%	57,605,000	4,009,500
Spring	49%	52%	71,932,000	5,846,500
Summer	59%	56%	87,736,500	6,238,500
Fall	50%	44%	73,261,500	4,928,000

TOTAL U.S.

Increase in vacations and short breaks being booked outside of school holidays

YouGov Global Travel Profiles (United States) – 2023 Base: Total Americans 18+

* Calculation: Total potential out of state pleasure travellers aged 18+ (147,704,500) x total in US typically travel during season

* Calculation: Total HVG population (11,200,000) x total HVG typically travel during season

Source: United States GTRP – December 2023

35

Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
D1. In general, what time of year do you typically like to take vacation trips? Select all that apply

➕ / ➖ = significantly higher/lower result (vs. Total)

Interest in Fall/Winter Vacations

Interest is stronger for Fall vacations, with 59.7 million Americans who are extremely interested in taking a trip during a destination's Fall season. For Winter, 34.3 million are extremely interested in taking a trip during a destination's Winter season.

State Insight:
At 70% (T2B) Californian's express significantly higher interest in Winter season travel.

Fall

% Extremely/somewhat interested (top 2 box)

77%	71%

Legend:
- ■ Extremely interested
- ■ Somewhat interested
- ■ Neutral
- ■ Not very interested
- ■ Not at all interested
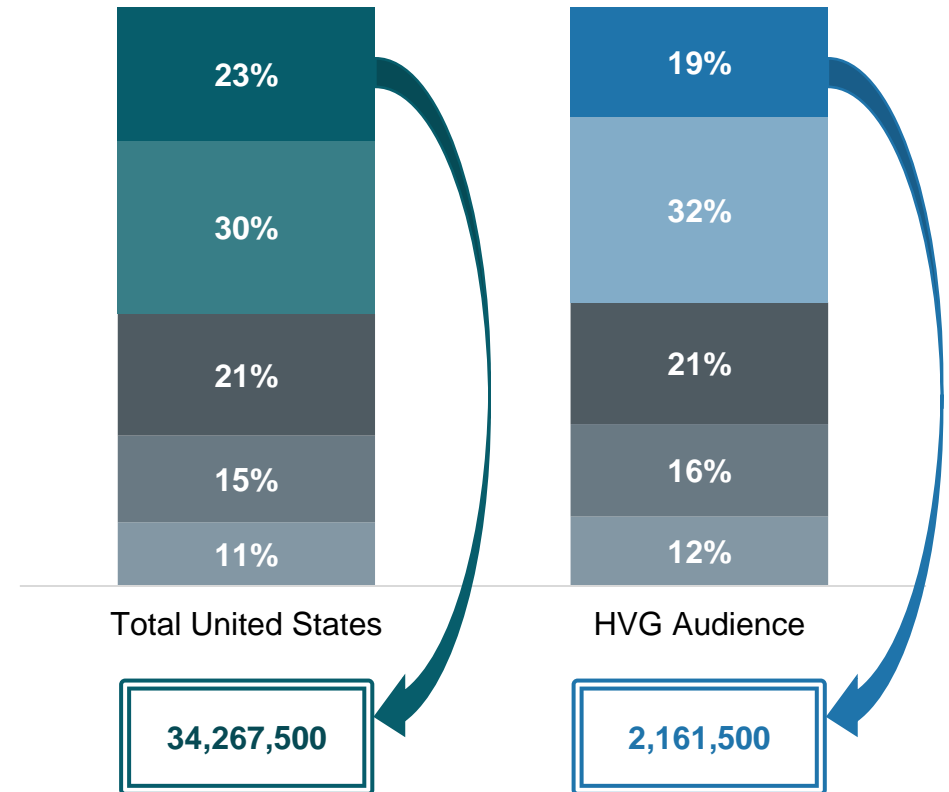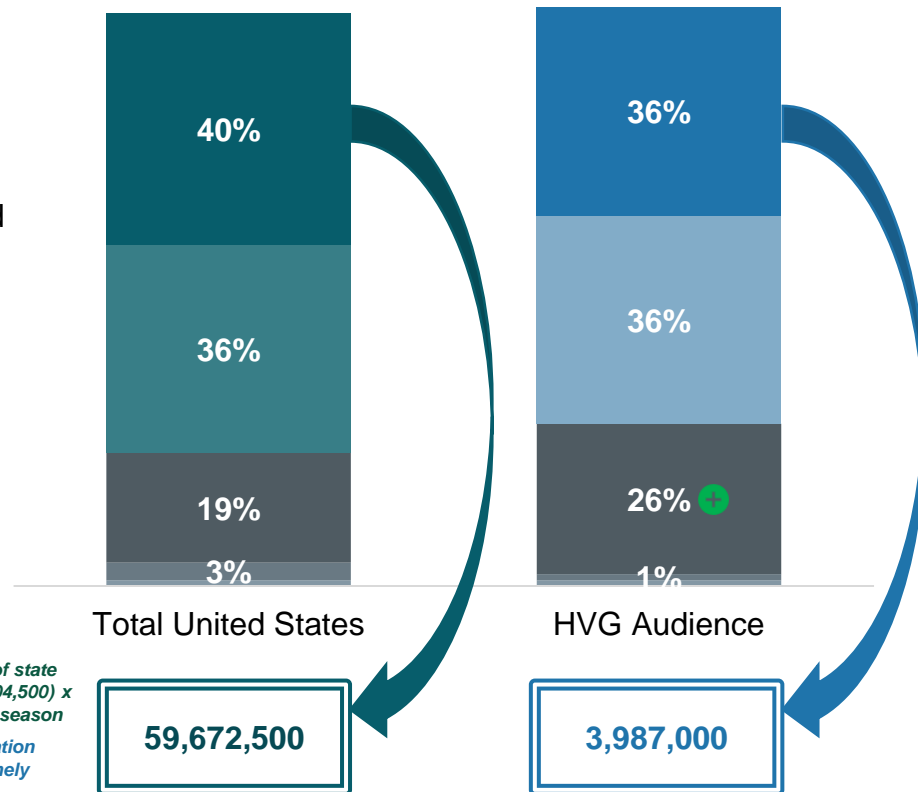
Total United States
- 40%
- 36%
- 19%
- 3%

HVG Audience
- 36%
- 36%
- 26% ⊕
- 1%

* Calculation: Total potential out of state pleasure travellers aged 18+ (147,704,500) x total in US extremely interested in season

* Calculation: Total HVG population (11,200,000) x total HVG extremely interested in season

59,672,500

3,987,000

Winter

% Extremely/somewhat interested (top 2 box)

54%	52%

Total United States
- 23%
- 30%
- 21%
- 15%
- 11%

HVG Audience
- 19%
- 32%
- 21%
- 16%
- 12%

34,267,500

2,161,500

Note: respondents were asked either about winter travel (D2) or fall travel (D3)
Base: Out of state pleasure travellers (past 3 years or next 2 years)
D3. In general, how interested are you in taking a vacation trip to a destination during **its fall season**? (n=2055); HVG (n=122)
D2. In general, how interested are you in taking a vacation trip to a destination during **its winter season**? (n=2116); HVG (n=138)

Source: United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Top of Mind Fall/Winter Destinations
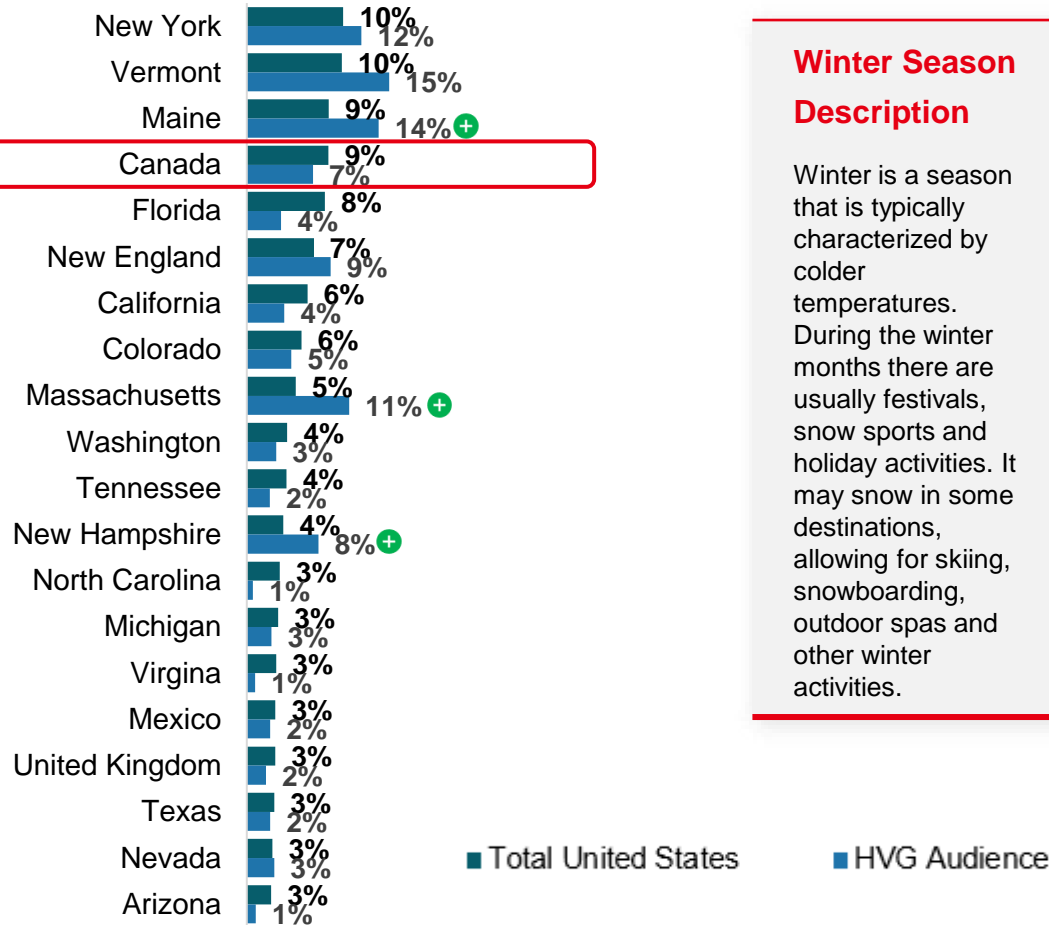
DESTINATION CANADA

Canada is a top destination mentioned on an unaided basis for fall trips. While mentions of Canada are comparable as a winter destination, it trails significantly behind Colorado. Sun destinations are very much part of the consideration set.

Fall

Destination	Total United States	HVG Audience
New York	10%	12%
Vermont	10%	15%
Maine	9%	14% +
Canada	**9%**	**7%**
Florida	8%	4%
New England	7%	9%
California	6%	4%
Colorado	6%	5%
Massachusetts	5%	11% +
Washington	4%	3%
Tennessee	4%	2%
New Hampshire	4%	8% +
North Carolina	3%	1%
Michigan	3%	3%
Virginia	3%	1%
Mexico	3%	2%
United Kingdom	3%	2%
Texas	3%	2%
Nevada	3%	2%
Arizona	3%	1%

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.
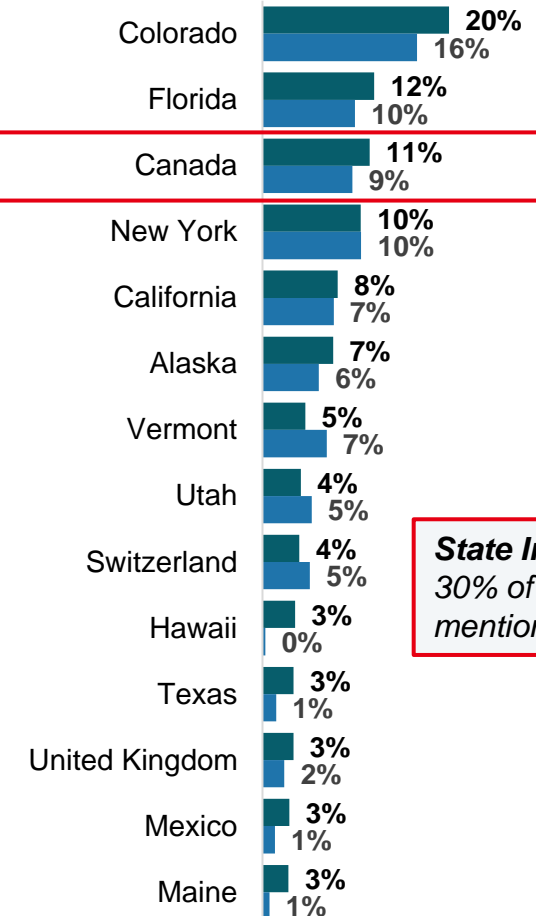
Winter

Destination	Total United States	HVG Audience
Colorado	20%	16%
Florida	12%	10%
Canada	**11%**	**9%**
New York	10%	10%
California	8%	7%
Alaska	7%	6%
Vermont	5%	7%
Utah	4%	5%
Switzerland	4%	5%
Hawaii	3%	0%
Texas	3%	1%
United Kingdom	3%	2%
Mexico	3%	1%
Maine	3%	1%

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.

State Insight: 30% of Texans mention Colorado

■ Total United States ■ HVG Audience

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)
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. (n=2055); HVG (n=122)
B2. What destinations come to mind when thinking about travel to experience the **winter 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. (n=2116); HVG (n=138)

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Potential Market Size For Canada in Fall/Winter

The Canadian market potential is 1.7 times greater in Fall than Winter.

Total potential travellers aged 18 years or more		Target Market for Canada Those in the dream to purchase stages of the path to purchase for Canada		Size of the target market		Consideration for Canada in [SEASON] in N2Y		Immediate potential for Canada in N2Y

Out of state pleasure travellers

147,704,500	X	71.1%	=	105,018,000	X	Fall: 46.8%	=	Fall: 49,148,500
						Winter: 27.4%		Winter: 28,775,000

HVG travellers

11,200,000	X	64.8%	=	7,257,500	X	Fall: 43.8%	=	Fall: 3,179,000
						Winter: 22.5%		Winter: 1,633,000

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) Total (n=4171)
C7. For each of the following destinations, during which months would you consider taking a vacation trip in the next two years? Total (n=2919)

Fall/Winter Conversion – Total US

There is higher conversion between those who typically travel during the Fall months and interest in taking a trip during a destination's Fall season (81%) compared to Winter travellers and interest in taking a trip during a destination's Winter season (59%). However, Canada has strong potential to convert both those who are extremely interested in travel during the Fall and Winter seasons.

Fall

Winter

Demand During Fall Months (any destination)

73,261,500

81%

Extremely Interested in Visiting a Destination During its Fall Season (any destination)

59,672,500

82%

Next 2 Year Immediate Potential for CANADA During Fall Season

49,148,500

Demand During Winter Months (any destination)

57,605,000

59%

Extremely Interested in Visiting a Destination During its Winter Season (any destination)

34,267,500

84%

Next 2 Year Immediate Potential for CANADA During Winter Season

28,775,000

Base: Out of state pleasure travellers (past 3 years or next 2 years)
D1. In general, what time of year do you typically like to take vacation trips? Select all that apply Total (n=4171)
D3. In general, how interested are you in taking a vacation trip to a destination during **its fall season**? Total (n=2116)
D2. In general, how interested are you in taking a vacation trip to a destination during **its winter season**? Total (n=2055)
C7. For each of the following destinations, during which months would you consider taking a vacation trip in the next two years? Total (n=2919)

United States GTRP – December 2023

Fall/Winter Conversion – US Target States

California has the highest conversion potential (88%) for Fall travel to Canada, with 6.1M potential visitors over the next 2 years. Among those who typically travel in the Winter months, those from NY/NJ are least interested in travelling to a destination during its Winter season.

Fall

	California	New York / New Jersey	Texas
Demand During Fall Months (any destination)	8,357,500	6,899,000	6,538,500
	83%	92%	84%
Extremely Interested in Visiting a Destination During its Fall Season (any destination)	6,931,000	6,329,000	5,513,500
	88%	77%	71%
Next 2 Year Immediate Potential for CANADA During Fall Season	6,119,500	4,850,000	3,936,500

Winter

	California	New York / New Jersey	Texas
Demand During Winter Months (any destination)	6,931,000	6,569,000	4,196,500
	81%	62%	78%
Extremely Interested in Visiting a Destination During its Winter Season (any destination)	5,614,500	4,064,500	3,257,000
	83%	80%	74%
Next 2 Year Immediate Potential for CANADA During Winter Season	4,679,500	3,241,000	2,419,000

Fall/Winter Conversion – Among HVG Audience

DESTINATION CANADA

Canadian market potential is 2 times greater in Fall (3.2M) than Winter (1.6M). Among HVGs who typically travel during the Winter months, only 54% are extremely interested in travelling to a destination during its Winter season.

Fall

Demand During Fall Months (any destination)
4,928,000

81%

Extremely Interested in Visiting a Destination During its Fall Season (any destination)
3,987,000

80%

Next 2 Year Immediate Potential for CANADA During Fall Season
3,179,000

Winter

Demand During Winter Months (any destination)
4,009,500

54%

Extremely Interested in Visiting a Destination During its Winter Season (any destination)
2,161,500

76%

Next 2 Year Immediate Potential for CANADA During Winter Season
1,633,000

United States GTRP – December 2023

Fall/Winter Conversion – Among HVG Target States

DESTINATION CANADA

Texas has the highest conversion potential (112%) for Fall travel to Canada among the HVG audience. Among those who typically travel in the winter months, HVGs from California are least interested in travelling to a destination during its Winter season.

Fall

	California	New York / New Jersey	Texas
Demand During Fall Months (any destination)	2,491,000	1,326,000	1,245,000
	78%	93%	62%
Extremely Interested in Visiting a Destination During its Fall Season (any destination)	1,940,000	1,231,000	775,000
	73%	76%	112%
Next 2 Year Immediate Potential for CANADA During Fall Season	**1,414,500**	**939,500**	**868,000**

Winter

	California	New York / New Jersey	Texas
Demand During Winter Months (any destination)	2,056,500	1,271,500	597,500
	39%	43%	156%
Extremely Interested in Visiting a Destination During its Winter Season (any destination)	805,500	544,000	935,000
	97%	74%	58%
Next 2 Year Immediate Potential for CANADA During Winter Season	**782,000**	**400,500**	**541,500**

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

British Columbia, Ontario and Quebec are the top Canadian provinces for both Fall and Winter travel.

DESTINATION CANADA

Total United States

HVG Audience

Nunavut
1%	1%	**Winter** (Dec, Jan, Feb)
1%	-	**Spring** (Mar, Apr, May)
2%	1%	**Summer** (Jun, Jul, Aug)
1%	1%	**Fall** (Sept, Oct, Nov)

Northwest Territories
2%	2%	**Winter** (Dec, Jan, Feb)
3%	3%	**Spring** (Mar, Apr, May)
5%	5%	**Summer** (Jun, Jul, Aug)
3%	7% ⊕	**Fall** (Sept, Oct, Nov)

Quebec
7%	6%	**Winter** (Dec, Jan, Feb)
14%	14%	**Spring** (Mar, Apr, May)
23%	22%	**Summer** (Jun, Jul, Aug)
14%	19%	**Fall** (Sept, Oct, Nov)

Newfoundland & Labrador
2%	1%	**Winter** (Dec, Jan, Feb)
5%	5%	**Spring** (Mar, Apr, May)
8%	8%	**Summer** (Jun, Jul, Aug)
5%	5%	**Fall** (Sept, Oct, Nov)

Yukon
3%	2%	**Winter** (Dec, Jan, Feb)
4%	4%	**Spring** (Mar, Apr, May)
5%	7%	**Summer** (Jun, Jul, Aug)
3%	3%	**Fall** (Sept, Oct, Nov)

Prince Edward Island
3%	1%	**Winter** (Dec, Jan, Feb)
5%	4%	**Spring** (Mar, Apr, May)
8%	5%	**Summer** (Jun, Jul, Aug)
5%	3%	**Fall** (Sept, Oct, Nov)

British Columbia
10%	8%	**Winter** (Dec, Jan, Feb)
19%	16%	**Spring** (Mar, Apr, May)
28%	21% ⊖	**Summer** (Jun, Jul, Aug)
17%	18%	**Fall** (Sept, Oct, Nov)

New Brunswick
2%	2%	**Winter** (Dec, Jan, Feb)
4%	4%	**Spring** (Mar, Apr, May)
5%	2%	**Summer** (Jun, Jul, Aug)
4%	1%	**Fall** (Sept, Oct, Nov)

Alberta
6%	7%	**Winter** (Dec, Jan, Feb)
11%	12%	**Spring** (Mar, Apr, May)
17%	17%	**Summer** (Jun, Jul, Aug)
10%	9%	**Fall** (Sept, Oct, Nov)

Nova Scotia
3%	1%	**Winter** (Dec, Jan, Feb)
7%	6%	**Spring** (Mar, Apr, May)
12%	7%	**Summer** (Jun, Jul, Aug)
7%	3% ⊖	**Fall** (Sept, Oct, Nov)

Saskatchewan
3%	3%	**Winter** (Dec, Jan, Feb)
5%	5%	**Spring** (Mar, Apr, May)
5%	4%	**Summer** (Jun, Jul, Aug)
3%	2%	**Fall** (Sept, Oct, Nov)

Manitoba
3%	6% ⊕	**Winter** (Dec, Jan, Feb)
5%	3%	**Spring** (Mar, Apr, May)
6%	3%	**Summer** (Jun, Jul, Aug)
4%	3%	**Fall** (Sept, Oct, Nov)

Ontario
8%	8%	**Winter** (Dec, Jan, Feb)
20%	20%	**Spring** (Mar, Apr, May)
30%	25%	**Summer** (Jun, Jul, Aug)
18%	17%	**Fall** (Sept, Oct, Nov)

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=2919); HVG (n=167)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Motivators & Barriers for Fall Travel to Canada

DESTINATION CANADA

Weather is both a motivator and deterrent. While some are unable to take vacation during the Fall months, others are not only available but appreciate smaller crowds and lower prices in the off-season.

Motivators for Fall Travel

■ Total United States (n=1770) ■ HVG Audience (n=97)

Motivator	Total United States	HVG Audience
The weather is ideal at the places I want to visit during these months	42%	47%
There are less crowds at the places I want to visit during these months	35%	33%
I am able to take a vacation during these months	32%	38%
Travel prices are cheaper during these months	28%	23%
There are specific activities I want to do in Canada that are available in these months	21%	19%
There are places in Canada I'd only want to visit during these months	19%	15%
It's school holidays so I can enjoy a family trip	14%	13%
Don't know	9%	7%

Barriers for Fall Travel
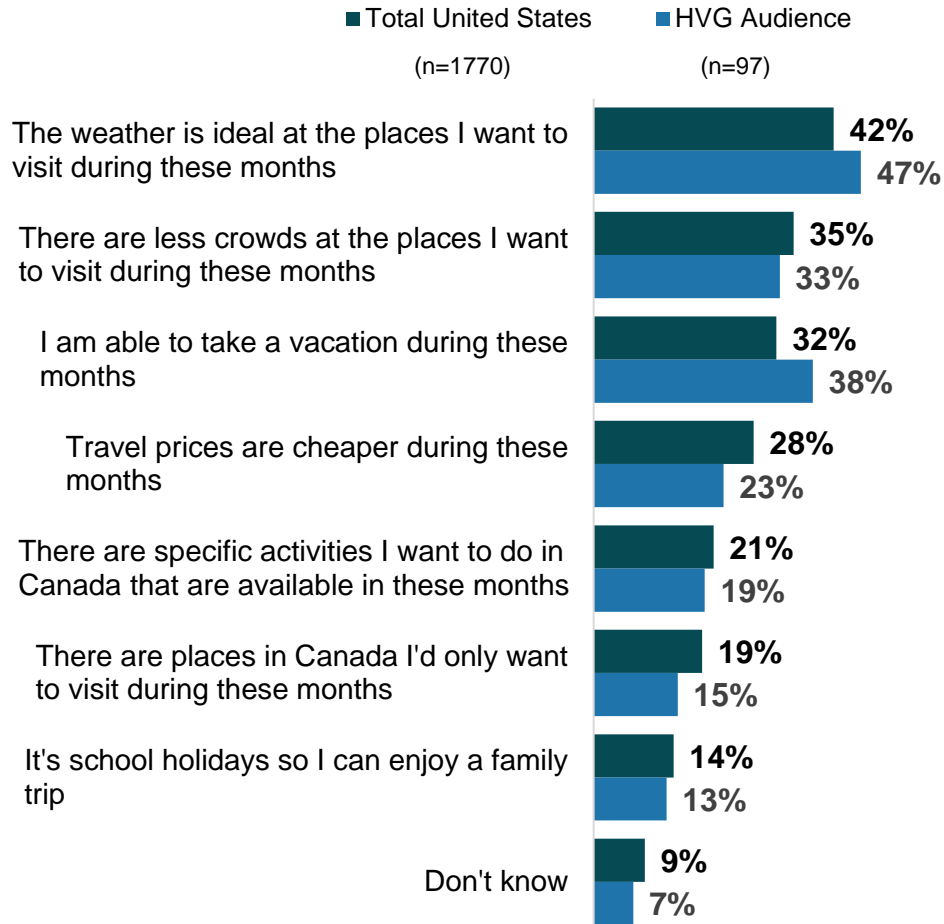
■ Total United States (n=1149) ■ HVG Audience (n=70)

Barrier	Total United States	HVG Audience
The weather is not ideal at the places I want to visit during these months	27%	30%
I am unable to take a vacation during these months	22%	29%
I don't know enough about what activities are available during these months	16%	13%
There are other places I'd rather visit during these months	16%	7% ⊖
My kids are in school and I don't want them to miss class	14%	14%
Travel prices are more expensive during these months	13%	19%
The activities I want to do are not available in these months	9%	11%
There are too many crowds at the places I want to visit during these months	7%	8%
Nothing would prevent me from travelling to Canada during these months	20%	26%

44

United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Interest in Fall Activities in Canada

Natural attractions, the Northern lights and Fall colours top the list of activities Americans are most interested in doing during a Fall trip to Canada.

% Somewhat/Very interested

■ Total United States   ■ HVG Audience

Activity	Total United States	HVG Audience
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	88%	92%
Northern lights	87%	89%
Fall colors	83%	86%
City sightseeing and experiences (e.g. city tours, markets)	81%	85%
Wildlife viewing (e.g. bears, moose, birds)	79%	83%
Culinary or dining experiences	77%	80%
Cultural attractions (e.g. art galleries, museums)	77%	78%
Whale watching	76%	73%
Learning about Indigenous culture, traditions or history	75%	71%
Train journeys	75%	70%
Hiking or walking in nature	75%	79%
Polar bear viewing	72%	73%
Self-guided driving tours or road trips	70%	71%
Wilderness lodges	64%	57%
Spas	57%	57%
Fishing or angling	44%	38%
Mountain biking	39%	41%

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=2919); HVG (n=167)
E11. What is your level of interest in the following activities or experiences in Canada during the **fall season**?

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Motivators & Barriers for Winter Travel to Canada

DESTINATION CANADA

The cold weather in the Winter months is a significant barrier with a relatively small proportion preferring other places during these months.

Motivators for Winter Travel

■ Total United States (n=1018)   ■ HVG Audience (n=47*)

Motivator	Total United States	HVG Audience
I am able to take a vacation during these months	35%	45%
There are specific activities I want to do in Canada that are available in these months	35%	26%
The weather is ideal at the places I want to visit during these months	31%	27%
There are less crowds at the places I want to visit during these months	29%	22%
Travel prices are cheaper during these months	29%	25%
There are places in Canada I'd only want to visit during these months	27%	23%
Don't know	6%	4%

Barriers for Winter Travel

■ Total United States (n=1900)   ■ HVG Audience (n=120)

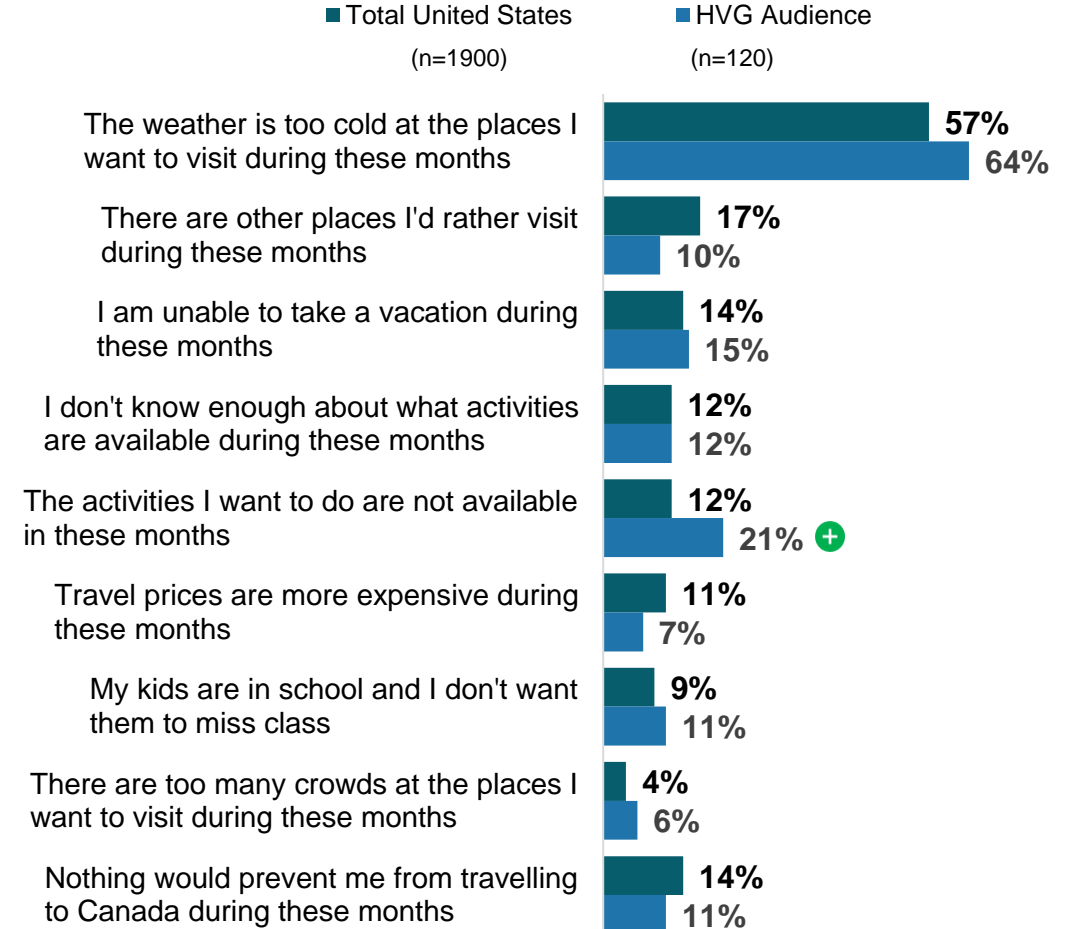| Barrier	Total United States	HVG Audience
The weather is too cold at the places I want to visit during these months	57%	64%
There are other places I'd rather visit during these months	17%	10%
I am unable to take a vacation during these months	14%	15%
I don't know enough about what activities are available during these months	12%	12%
The activities I want to do are not available in these months	12%	21% ⊕
Travel prices are more expensive during these months	11%	7%
My kids are in school and I don't want them to miss class	9%	11%
There are too many crowds at the places I want to visit during these months	4%	6%
Nothing would prevent me from travelling to Canada during these months	14%	11%

46

United States GTRP – December 2023

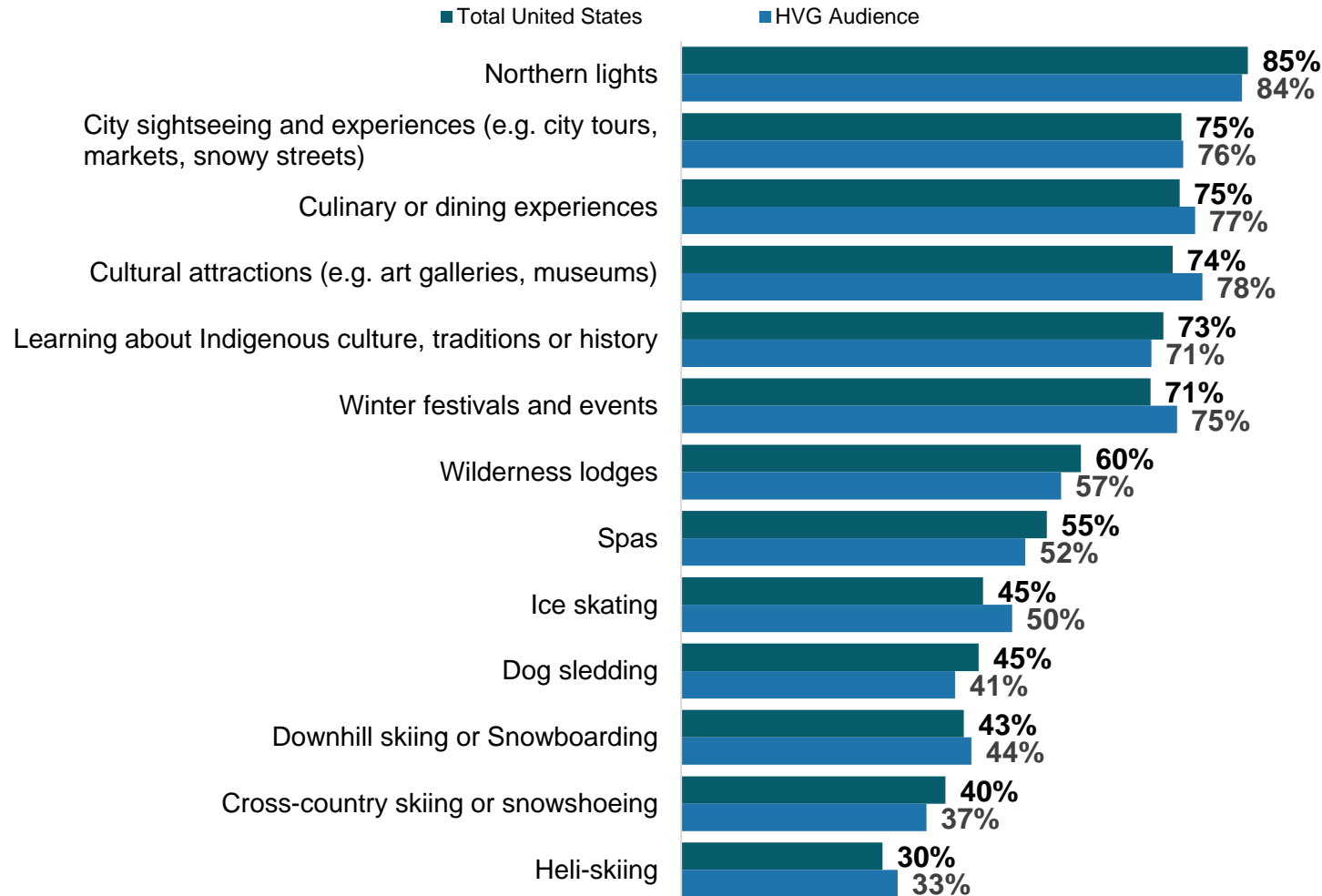⊕ / ⊖ = significantly higher/lower result (vs. Total)

Interest in Winter Activities in Canada

DESTINATION CANADA

The Northern lights also top the list of Winter activities. While 7 in 10 are interested in winter festivals and events, other outdoor activities such as ice skating and skiing fall to the bottom of the list. Instead, Winter travellers are seeking out city experiences, dining, cultural attractions and learning about Indigenous cultures.

% Somewhat/Very interested

■ Total United States   ■ HVG Audience

Activity	Total United States	HVG Audience
Northern lights	85%	84%
City sightseeing and experiences (e.g. city tours, markets, snowy streets)	75%	76%
Culinary or dining experiences	75%	77%
Cultural attractions (e.g. art galleries, museums)	74%	78%
Learning about Indigenous culture, traditions or history	73%	71%
Winter festivals and events	71%	75%
Wilderness lodges	60%	57%
Spas	55%	52%
Ice skating	45%	50%
Dog sledding	45%	41%
Downhill skiing or Snowboarding	43%	44%
Cross-country skiing or snowshoeing	40%	37%
Heli-skiing	30%	33%

State Insight:
Californians over index vs. other states on outdoor winter activities such as skiing, ice skating and dog sledding

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=2919); HVG (n=167)
E10. What is your level of interest in the following activities or experiences in Canada during the **winter season**?

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Sustainability

Churchill

Manitoba

Priority of Sustainable Travel When Planning a Trip

DESTINATION CANADA

Sustainability is a moderate priority for most American travellers.

% Score 5 to 7 (out of 7)

51%	48%

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

Total United States
- 14%
- 14%
- 24%
- 21%
- 9%
- 5%
- 14%

HVG Audience
- 9% ⊖
- 15%
- 24%
- 25%
- 7%
- 5%
- 15%
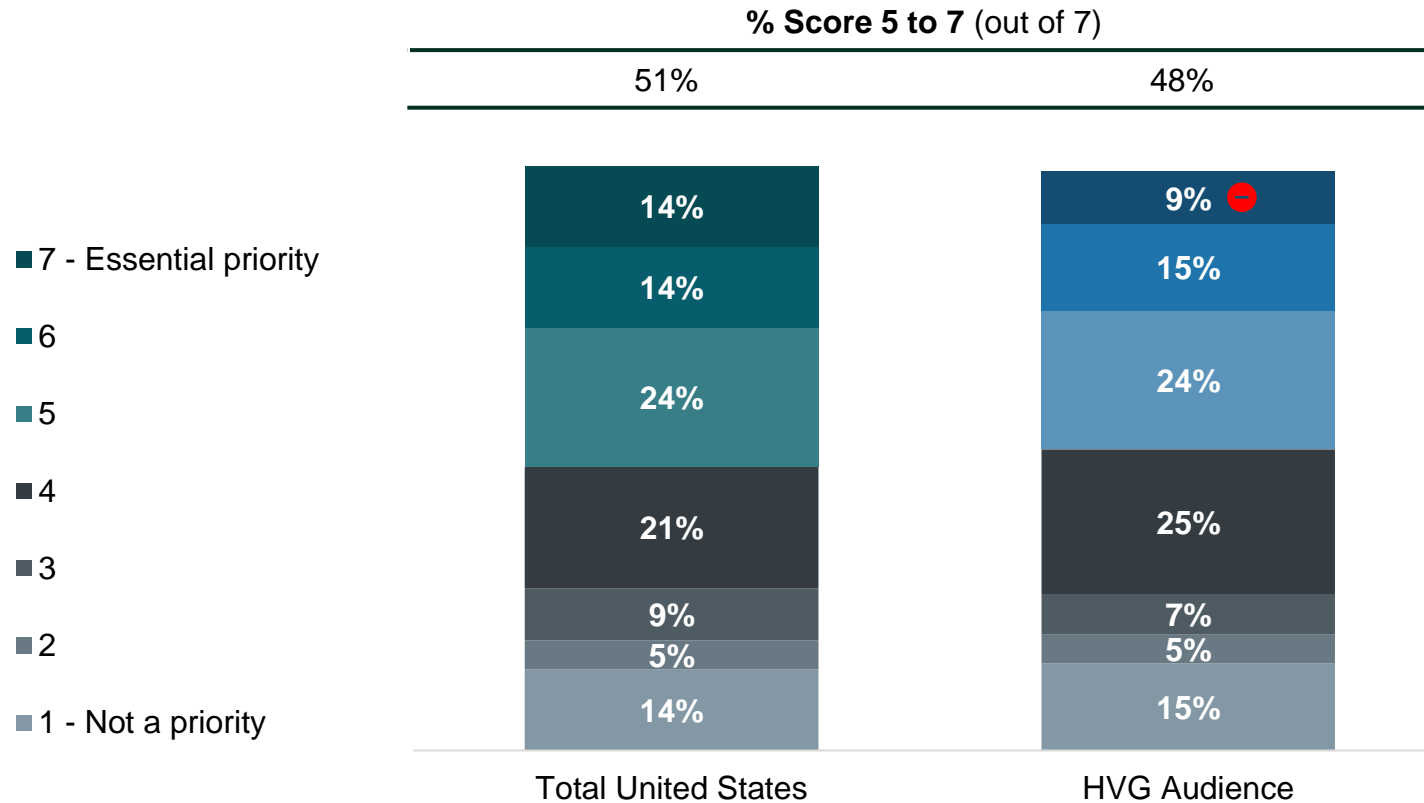
> **State Insight:**
> *65% of Californians rate sustainability as a priority (5 to 7), followed by NY/NJ at 56%, South at 52% and Texas at 49%*

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".

42% Total United States & 37% HVGs associate Canada as a "*socially responsible travel destination*"
42% Total United States & 41% HVGs associate Canada as an "*environmentally-friendly travel destination*"

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'.

United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

Efforts that carry the greatest importance are conservation of natural areas, knowing the destination is open and welcoming to travellers and knowing the local culture is not negatively impacted by tourism.

■ Total United States ■ HVG Audience

Effort	Total United States	HVG Audience
Conservation of natural areas in my destination	41%	39%
Knowing that the local community in my destination is open and welcoming to travellers	39%	40%
Knowing that the local culture of my destination is not negatively impacted by tourism	38%	37%
Knowing that my money is directly supporting the local community	35%	36%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	27%	25%
Eco-friendly accommodations in my destination	26%	27%
Dining options that use local and/or organic ingredients	25%	25%
Efforts to reduce overcrowding in my destination	21%	21%
Eco-tour activities in my destination	15%	11%
None of the above	4%	3%

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".
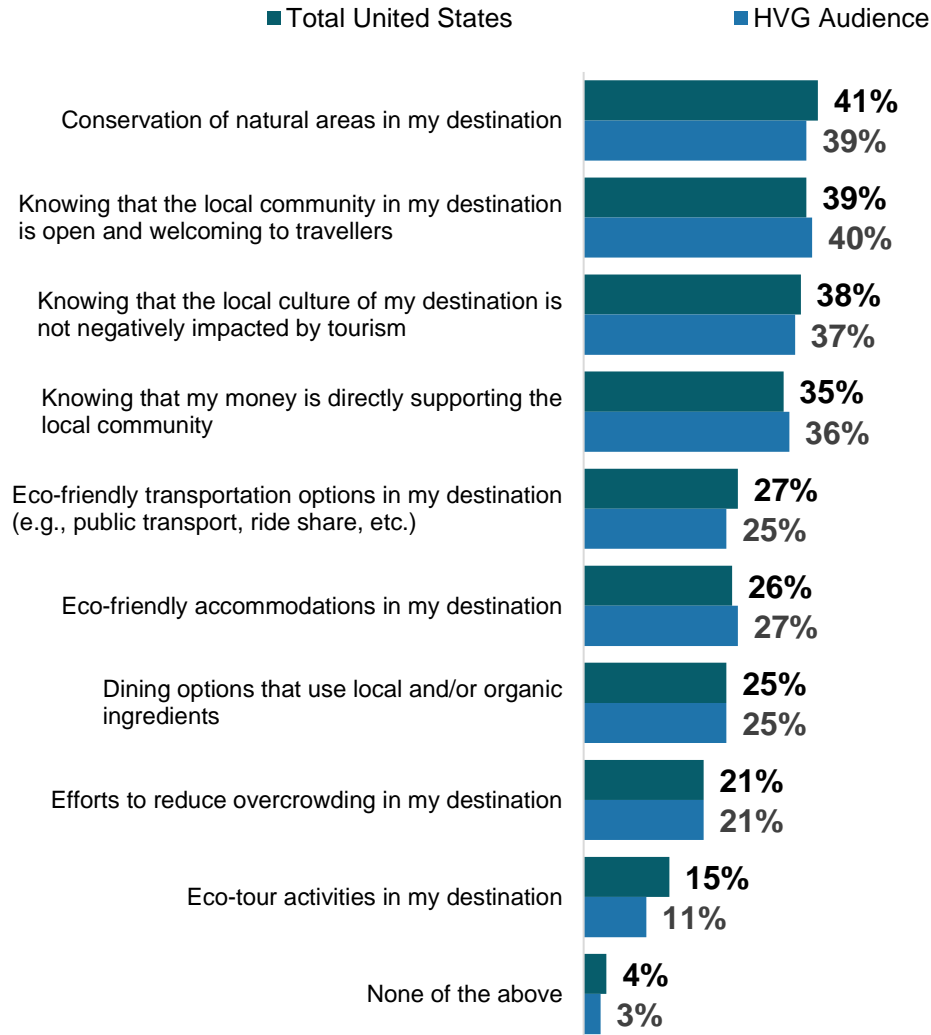
Base: Out of state pleasure travellers (past 3 years or next 2 years), Rated 5-7 at D7 (n=2104); HVG (n=119)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a vacation destination? Select up to three choices.

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Barriers to Sustainable Travel

DESTINATION CANADA

There is a perception that sustainable travel is more expensive but an even greater proportion of travellers say there is a lack of information around it.

■ Total United States   ■ HVG Audience

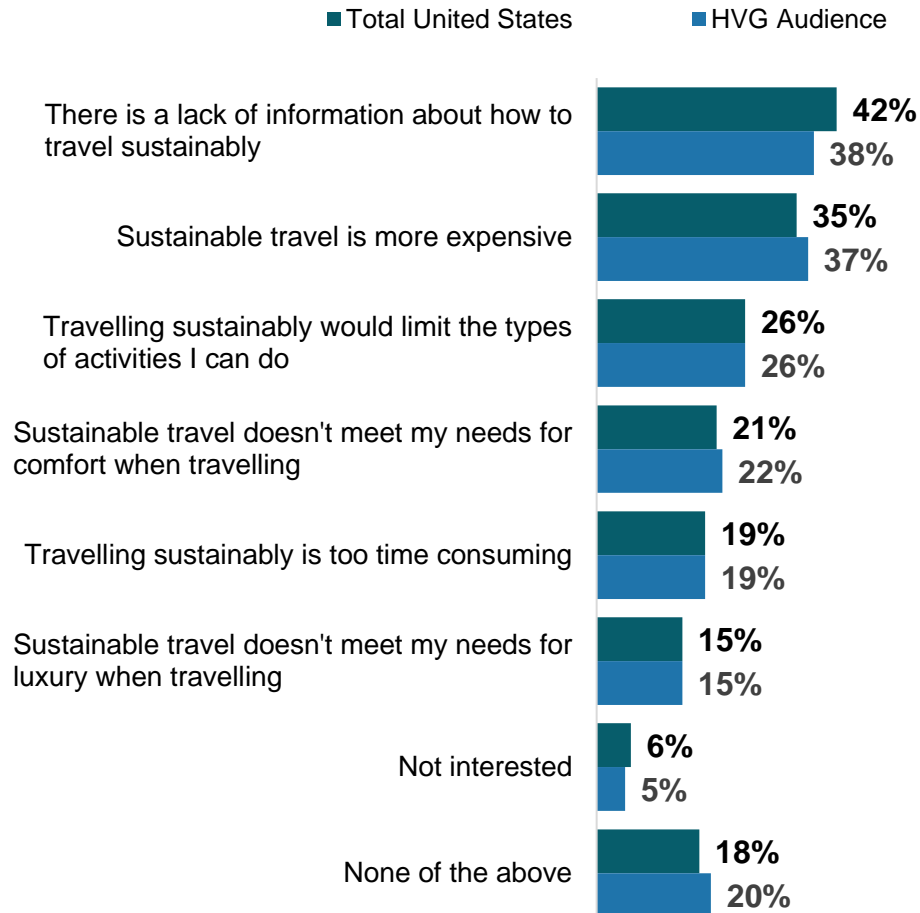| Barrier	Total United States	HVG Audience
There is a lack of information about how to travel sustainably	42%	38%
Sustainable travel is more expensive	35%	37%
Travelling sustainably would limit the types of activities I can do	26%	26%
Sustainable travel doesn't meet my needs for comfort when travelling	21%	22%
Travelling sustainably is too time consuming	19%	19%
Sustainable travel doesn't meet my needs for luxury when travelling	15%	15%
Not interested	6%	5%
None of the above	18%	20%

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".

Base: Out of state pleasure travellers (past 3 years or next 2 years) (n=4171); HVG (n=260)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

United States GTRP – December 2023

➕ / ➖ = significantly higher/lower result (vs. Total)

Indigenous Tourism

British Columbia

Unaided Mentions – Indigenous Cultural & Tourism Activities

There is little consensus as to what actual Indigenous cultural and tourism activities/experiences might entail. Arizona and New Mexico are the destinations that come to mind first, followed by Alaska, Mexico and Canada.
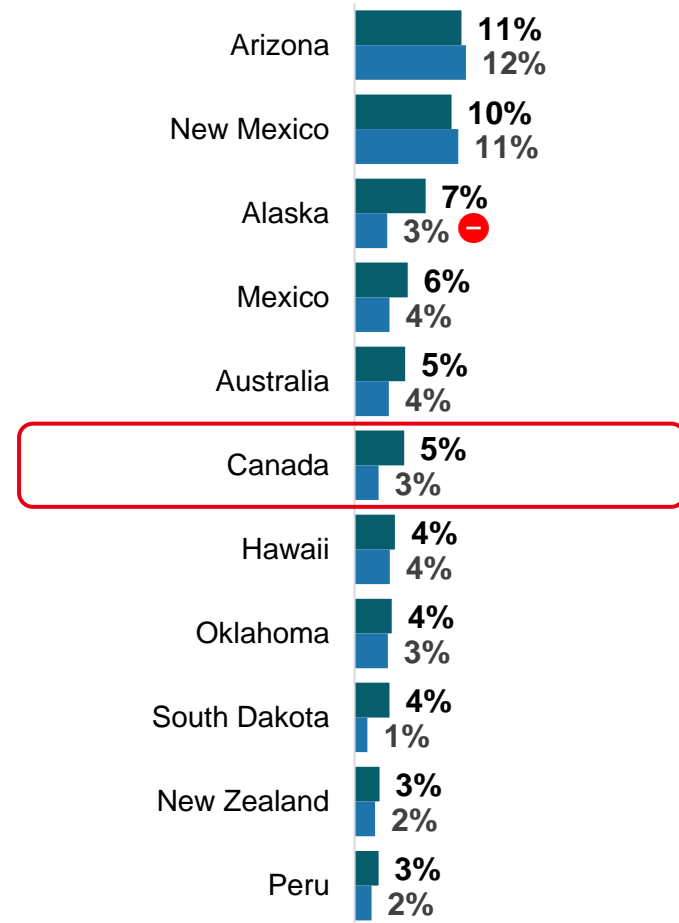
DESTINATION CANADA

Activities

■ Total United States   ■ HVG Audience

Activity	Total United States	HVG Audience
Indigenous people & their culture	28%	31%
Historical buildings/churches	6%	7%
Food & Drinks	5%	3%
Casinos	5%	4%
Learning/ Gaining Knowledge	5%	6%
Clothing/ Traditional attire	4%	4%
Everything is good/ok	4%	2%
Visiting Villages/Local people	4%	2%
Museums	3%	4%
Local Market	3%	2%
Ceremonies and festivals	3%	3%
Interesting/Fun/Entertaining	3%	3%
Visiting a reservations	3%	2%
Music events/ Shows/ Events	3%	2%
Exploring tourist places/attractions	3%	2%
Various art and craft work/Aborginal art	2%	3%
Eco tourism/Natural environment	2%	2%
New Mexico	2%	2%

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.

Tourism Destinations

■ Total United States   ■ HVG Audience

Destination	Total United States	HVG Audience
Arizona	11%	12%
New Mexico	10%	11%
Alaska	7%	3% ⊖
Mexico	6%	4%
Australia	5%	4%
Canada	5%	3%
Hawaii	4%	4%
Oklahoma	4%	3%
South Dakota	4%	1%
New Zealand	3%	2%
Peru	3%	2%

United States GTRP – December 2023

⊕ / ⊖ = significantly higher/lower result (vs. Total)

Interest in Indigenous Cultural & Tourism Activities

DESTINATION CANADA

There is stronger interest in more generally experiencing the Indigenous culture through food and drink, by visiting museums/sites, exhibitions or even visiting an Indigenous community/event. Interest is not as strong for visiting remote locations, learning about residential schools/reconciliation, or activities such as hunting/fishing.

% Somewhat/Very interested

- Total United States
- HVG Audience

Activity	Total United States	HVG Audience
Experiencing Indigenous food and drink	81%	82%
Visiting a museum, interpretation center or traditional Indigenous site	78%	81%
Indigenous adventure or excursions in nature (kayak, heritage parks, northern lights, etc.)	75%	74%
Visiting an Indigenous boutique or art/craft exhibition	75%	76%
Learning about Indigenous ways of life by visiting an Indigenous community	74%	73%
Attending an Indigenous Pow Wow, festival, event, or performance	73%	72%
Learning about Indigenous ways of life through storytelling or connecting with Indigenous Elders	71%	72%
Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)	67%	66%
Visiting remote northern Indigenous communities	63%	58%
Learning about residential schools and reconciliation with Indigenous peoples	59%	59%
Hunting and fishing activity with an Indigenous outfitter	46%	43%

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.

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=2919); HVG (n=167)
E12. [DESCRIPTION] What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada?

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

THANK YOU

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

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