

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

CANADA HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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STUDY OVERVIEW: CANADA MARKET

Target Population

The Canada study is conducted among the general population (excluding residents of the Northern Territories). Respondents are split into two groups based on their travel behaviour:

- **Domestic Out-of-Province Travellers:** Canadian residents aged 18 years and older, who have taken a pleasure trip in Canada beyond their own province where they had stayed at least 2 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year. These respondents evaluated destinations outside of their province.
- **In-Province:** Canadian residents aged 18 years and older, who evaluated destinations within their province of residence.

Timing of fieldwork

December 12th, 2023 – January 8th, 2024

To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). As a result, no trending is available for the Canadian market.

Due to the sampling approach for this study (with quotas for out-of-province travellers being filled first and all others falling into the in-province traveller category), comparison analysis between the two groups are not included. Furthermore, some questions were only asked among one of the two subgroups.

Key Insights



The next 2-year immediate potential for out-of-province travel in Canada is 15.9M Canadians



Both out-of-province travellers and in-province travellers are more likely to consider travelling during the Summer months, with the Fall season also being popular among out-of-province travellers



Canadians are interested in natural attractions and unique local experiences



Travellers within Canada in the past 3 years were most likely to be travelling with a spouse or partner; out-of-province travellers were also more likely to travel with friends, while in-province travellers were more likely to travel solo



There is a high level of interest in Indigenous culture, with Canadians showing interest in Indigenous food and drink, cultural sites, and boutique/craft exhibitions

MARKET SIZING

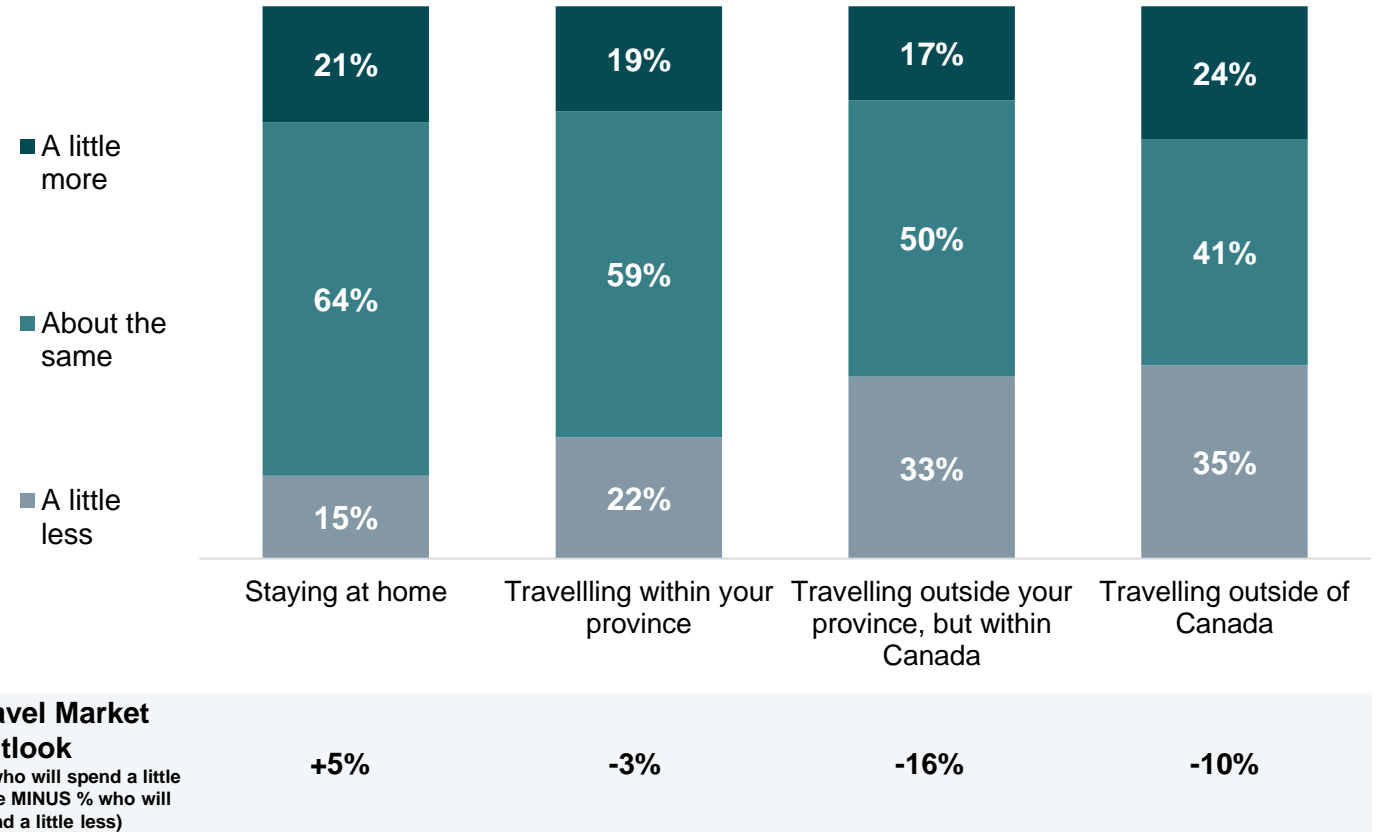


Kyle
Saskatchewan



VACATION OUTLOOK (IN NEXT 12 MONTHS)

Almost two in ten Canadians are either planning to travel within their province or outside their province but within Canada a little more compared to last year.



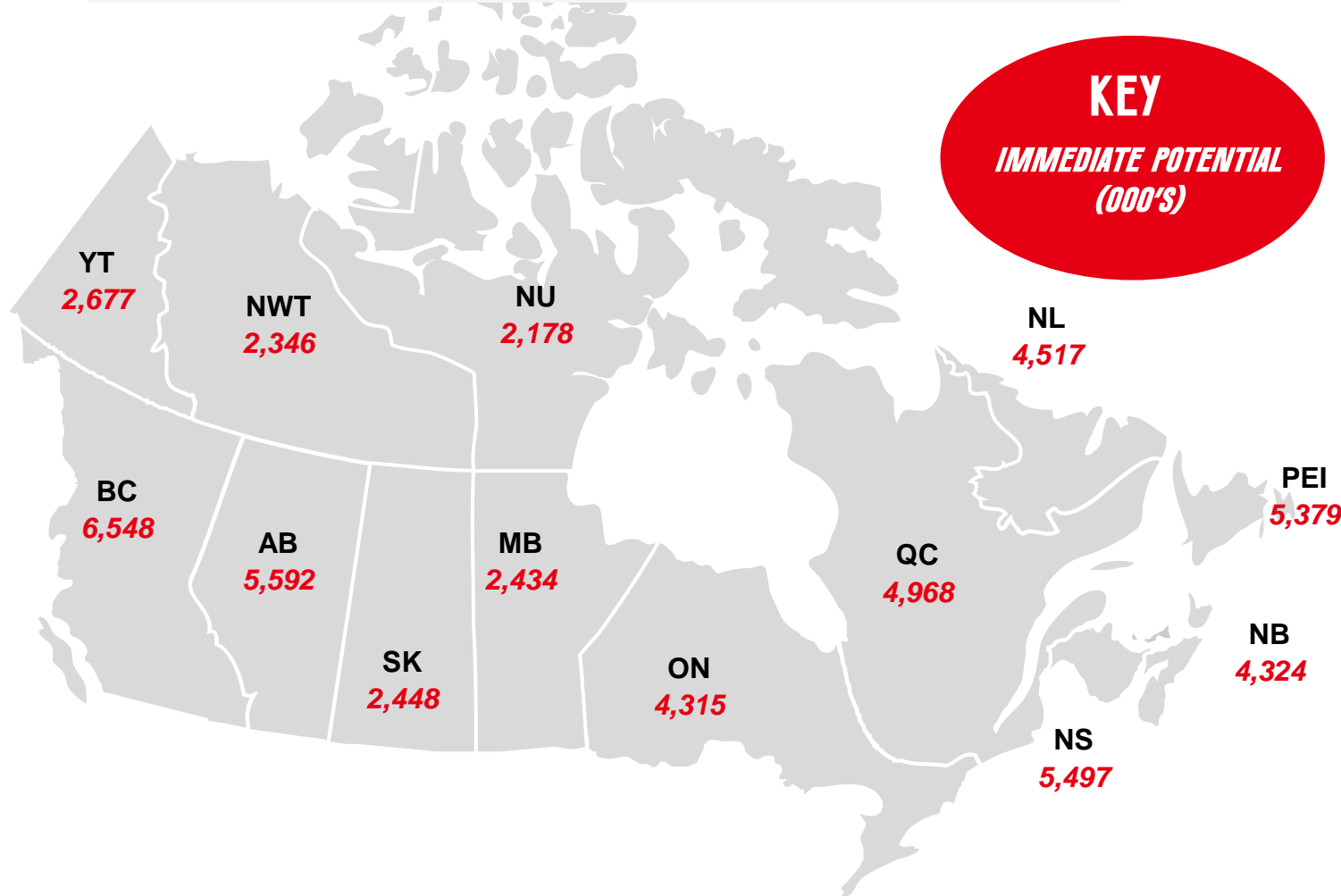
Base: Canadian residents 18+ (n=9250)
How do you plan to spend your vacation time in the next 12 months compared to the last 12 months? Will you spend your vacation time...

POTENTIAL OUT-OF-PROVINCE MARKET SIZE

Total Out-of-Province



NEXT YEAR IMMEDIATE POTENTIAL FOR CANADA: **15,994,500**



KEY

IMMEDIATE POTENTIAL
(000'S)

BC has the largest potential to draw in out-of-province travellers, followed by Alberta, Nova Scotia, PEI, and Québec.

7

Base: Domestic out-of-province travellers (n=4658)
You may have already mentioned this before, but would you consider visiting each of the following destinations in the next year?
Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.



Grand Manan Island
New Brunswick

Canada GTRP –
December 2023



TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

58%

Nature Walks

46%

Nature Parks

57%

Natural Attractions

46%

Lakeside Beaches

56%

Trying Local Food And Drink

44%

Viewing Wildlife or Marine Life

55%

Oceanside Beaches

43%

Historical, Archaeological Or World Heritage Sites

53%

Local Markets

42%

Autumn Colours

Total Canada



CANADIAN TOURISM DATA
collective



DESTINATION
CANADA



Canadians are most interested in nature walks and seeking natural attractions. Local food and drink alongside oceanside beaches are also popular.

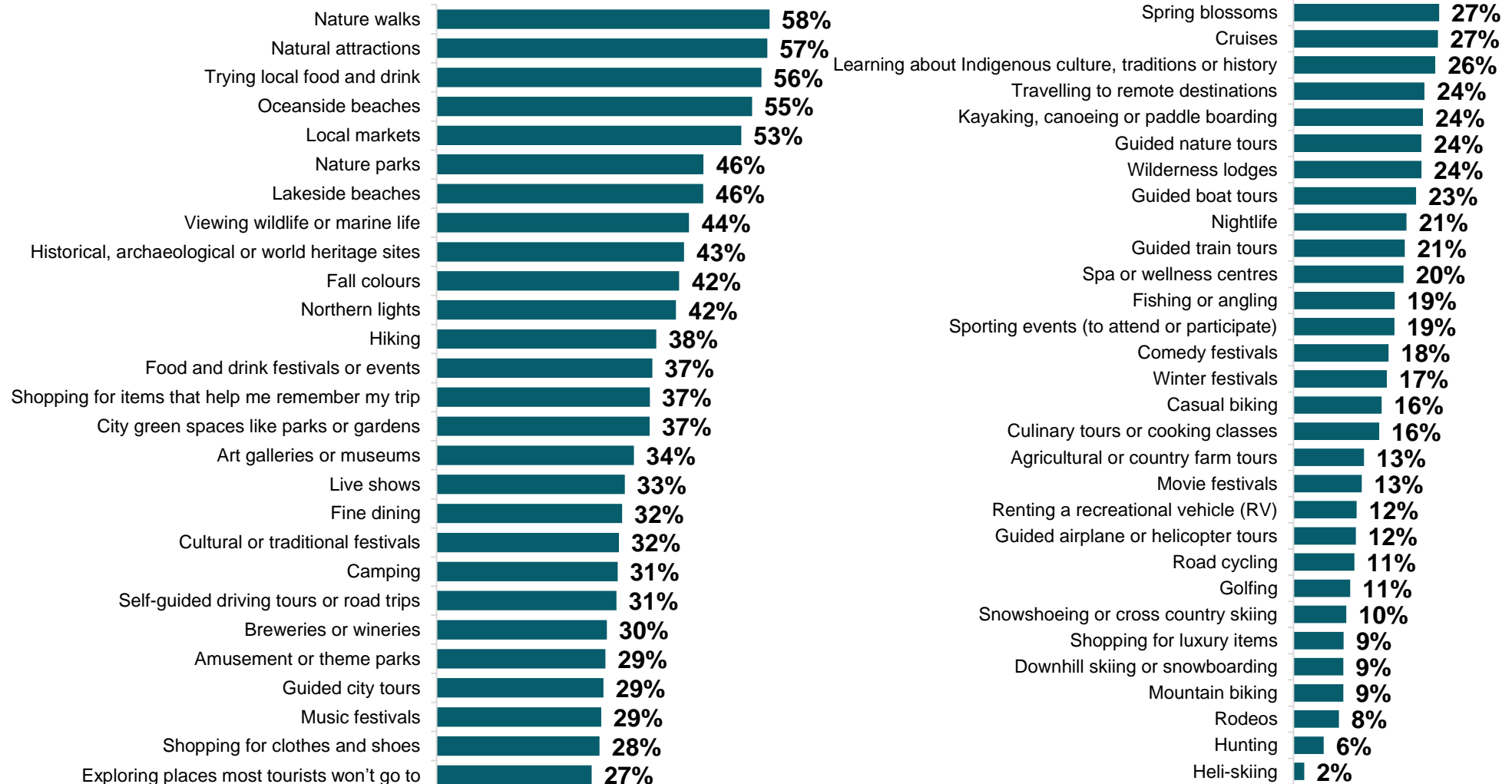


Winnipeg
Manitoba

Canada GTRP –
December 2023



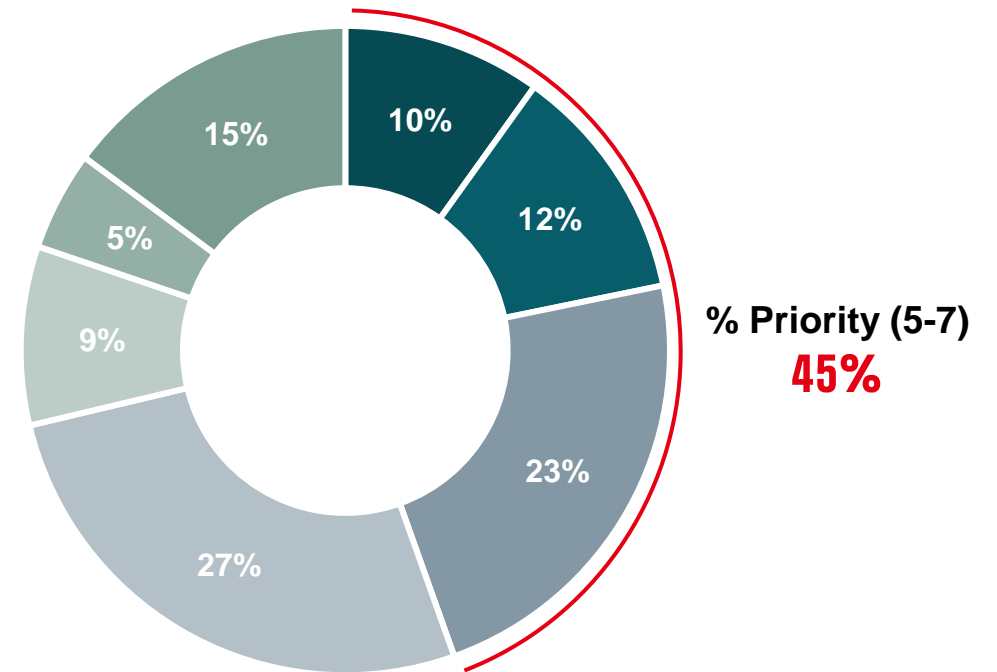
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Canadian residents 18+ (n=9250)
In general, what activities or places are you interested in while on vacation? (Select all that apply)



PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



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

Sustainable travel is a priority to over four in ten Canadians, with one in ten considering it an essential priority.

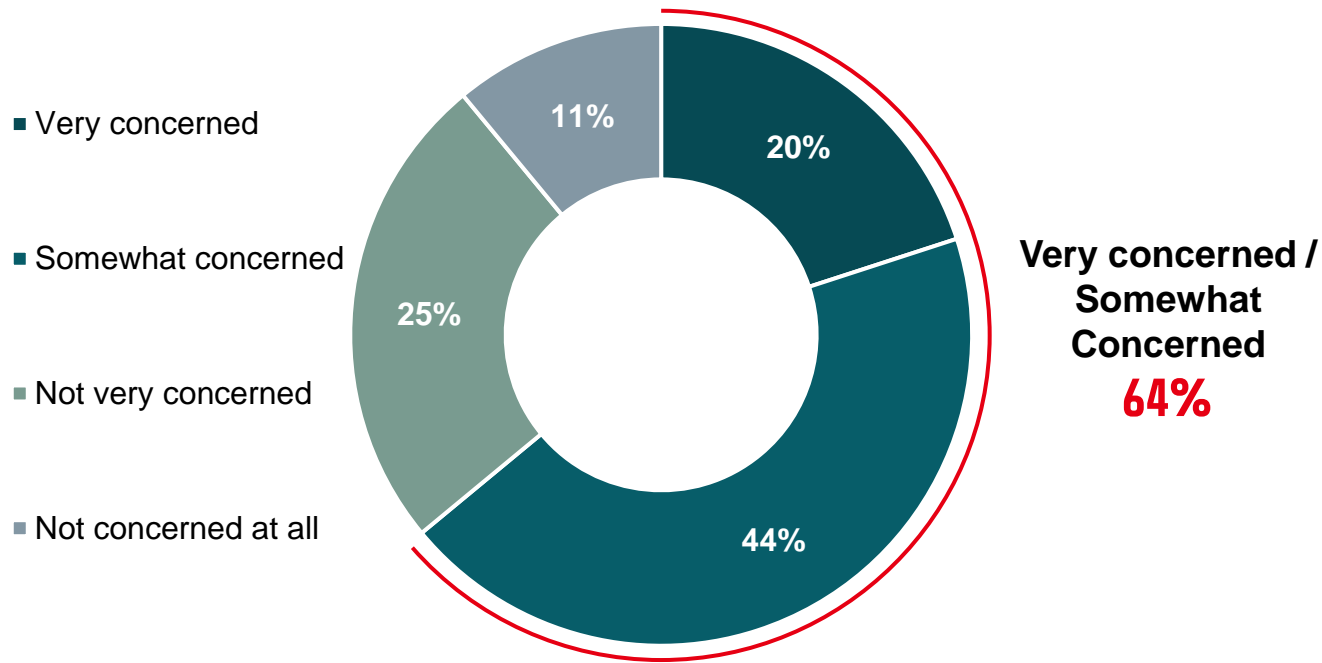


Nahanni

Northwest Territories

Base: Canadian residents 18+ (n=9250)
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'.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



14%

Changed/Cancelled plans in the past 3 years due to extreme weather events



Over six in ten Canadians are concerned about the impact of extreme weather on their travel plans.





Peggy's Cove
Nova Scotia



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collective



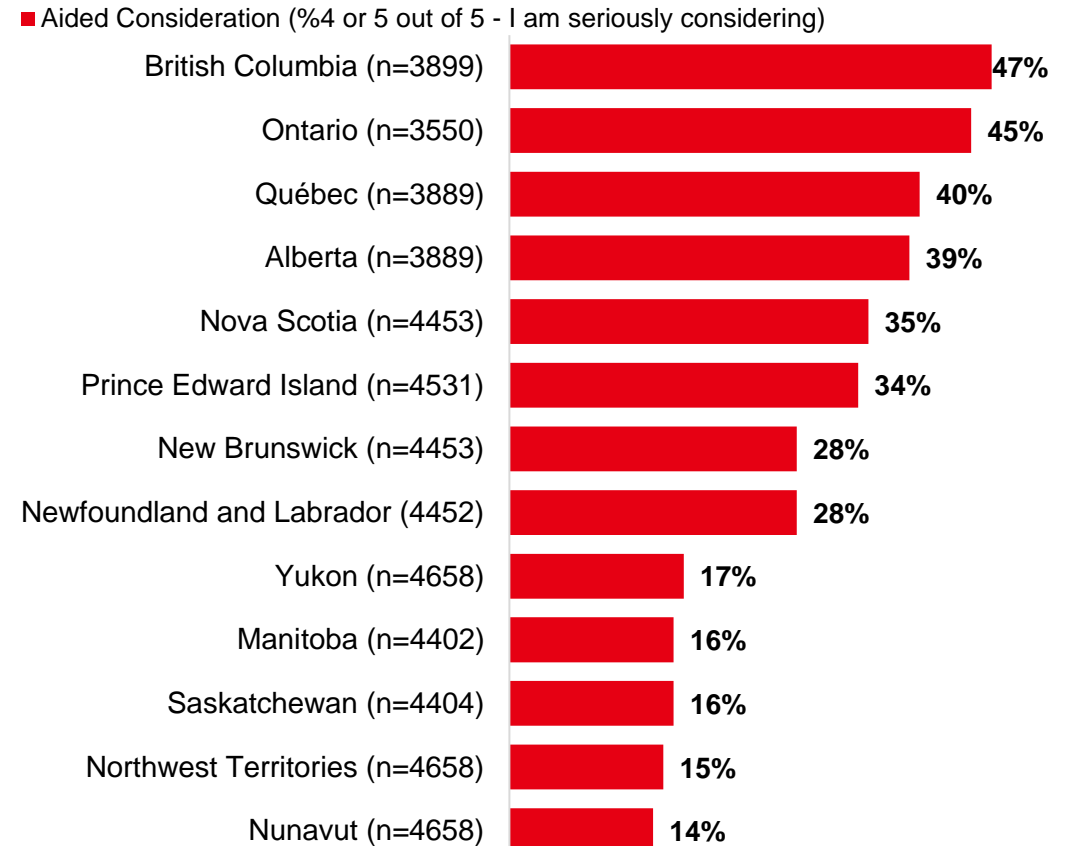
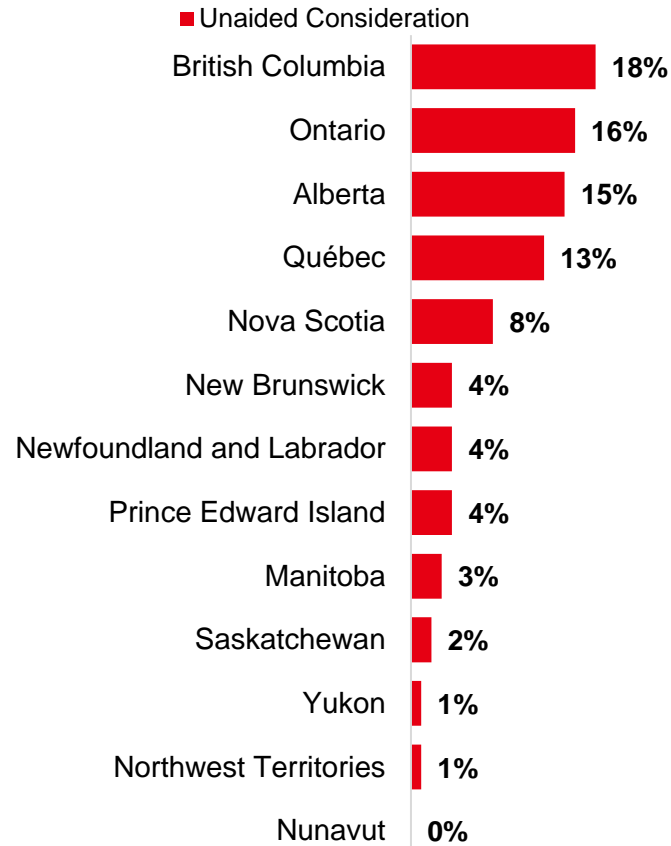
DESTINATION
CANADA

OUT-OF- PROVINCE TRAVELLERS



UNAIDED AND AIDED CONSIDERATION (NEXT YEAR) – PROVINCES & TERRITORIES

Out-of-province travellers are most interested in visiting BC, Ontario, Alberta and Québec.



Base: Domestic out-of-province travellers (n=4658)
You mentioned that you are likely to take a vacation trip of 2 or more nights outside of your own province, but within Canada in the next year. Which destinations are you seriously considering for your trips in the next year? (Please list up to 3 destinations.)

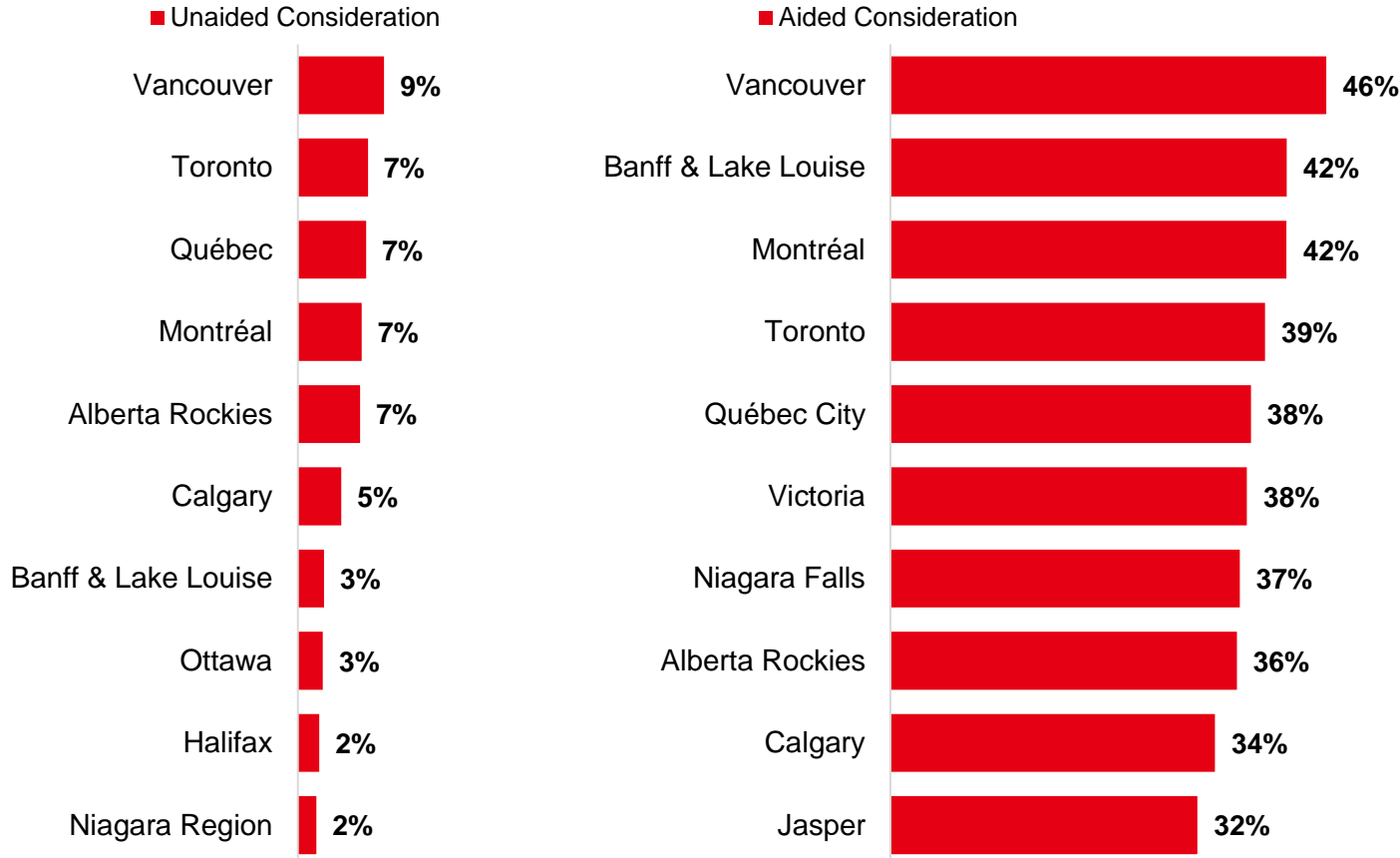
Base: Domestic out-of-province travellers
You may have already mentioned this before, but would you consider visiting each of the following destinations in the next year? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.



Sunshine Coast
British Columbia

UNAIDED AND AIDED CONSIDERATION (NEXT YEAR) – TOP 10 CITIES/REGIONS

% 4 or 5 out of 5 (I am seriously considering)



Base: Domestic out-of-province travellers (n=4658)
 You mentioned that you are likely to take a vacation trip of 2 or more nights outside of your own province, but within Canada in the next year. Which destinations are you seriously considering for your trips in the next year? (Please list up to 3 destinations.) You may have already mentioned this before, but would you consider visiting each of the following destinations in the next year? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

Vancouver is the most popular destination being considered among out-of-province travellers. Banff & Lake Louise and Montréal are also top cities being seriously considered for a future travel destination on an aided basis.



NET ACTIVE PLANNING

Canadians are actively planning their out-of-province trips to Ontario, British Columbia or Alberta, particularly to Calgary and Ottawa.

| | |
|---------------------------------|------------|
| British Columbia (n=716) | 15% |
| Vancouver (n=356) | 12% |
| Kootenay Rockies (n=363) | 10% |
| Thompson Okanagan (n=369) | 9% |
| Whistler (n=359) | 7% |
| Victoria (n=347) | 4% |

| | |
|-------------------------|-----------|
| Manitoba (n=720) | 8% |
| Churchill (n=363) | 7% |
| Winnipeg (n=408) | 5% |

| | |
|-----------------------------|-----------|
| Saskatchewan (n=715) | 8% |
| Regina (n=415) | 4% |
| Saskatoon (n=401) | 4% |

| | |
|-----------------------------|------------|
| Alberta (n=715) | 15% |
| Calgary (n=377) | 14% |
| Alberta Rockies (n=366) | 11% |
| Jasper (n=354) | 9% |
| Edmonton (n=355) | 8% |
| Banff & Lake Louise (n=357) | 8% |

| | |
|--------------------------|------------|
| Ontario (n=716) | 18% |
| Ottawa (n=342) | 13% |
| Toronto (n=339) | 12% |
| Niagara Falls (n=341) | 10% |
| Northern Ontario (n=339) | 8% |
| Muskoka (n=321) | 2% |

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Domestic out-of-province travellers (n=varies)

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)



Arctic Bay

Nunavut

NET ACTIVE PLANNING (CONTINUED)

| | |
|------------------------|------------|
| Québec | 14% |
| Montréal (n=360) | 10% |
| Québec City (n=363) | 6% |
| Mont Tremblant (n=364) | 5% |

| | |
|------------------------------|------------|
| New Brunswick (n=717) | 10% |
| Fredericton (n=415) | 6% |
| Saint John (n=419) | 6% |

| | |
|----------------------------|------------|
| Nova Scotia (n=719) | 11% |
| Halifax (n=417) | 7% |
| Cape Breton (n=415) | 5% |

| | |
|-------------------------------------|------------|
| Prince Edward Island (n=716) | 10% |
| Charlottetown (n=425) | 10% |

| | |
|--|-----------|
| Newfoundland & Labrador (n=717) | 8% |
| St. John's (n=414) | 5% |

| | |
|----------------------|-----------|
| Yukon (n=716) | 6% |
| Whitehorse (n=436) | 6% |
| Dawson City (n=437) | 3% |

| | |
|--------------------------------------|-----------|
| Northwest Territories (n=717) | 6% |
| Yellowknife (n=436) | 6% |
| Inuvik (n=436) | 3% |

| | |
|-------------------------|-----------|
| Nunavut‡ (n=716) | 6% |
|-------------------------|-----------|

Total Out-of-Province



Out-of-province travellers are also actively planning trips to Québec, with some interest in Nova Scotia, New Brunswick, and Prince Edward Island.



‡Iqaluit was not included in this question

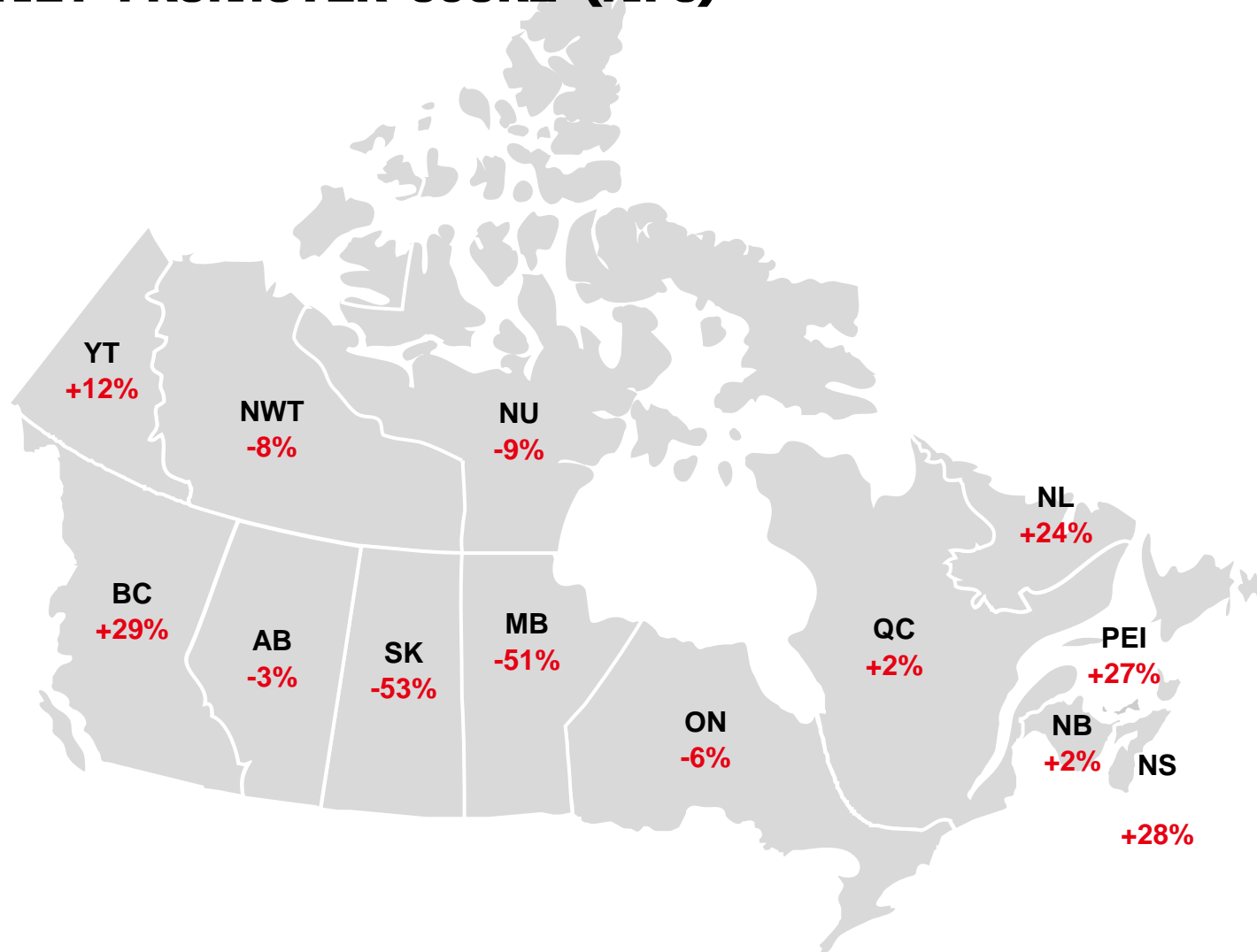
Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Domestic out-of-province travellers (n=varies)

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)



NET PROMOTER SCORE (NPS)



Among out-of-province travellers, BC is the most recommended province to visit, followed by Atlantic provinces Nova Scotia, PEI, and Newfoundland & Labrador.

Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).

Note: respondents evaluated up to 5 destinations among the ones they visited

Base: Domestic out-of-province travellers, Visited [DESTINATION]

How likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?



Peggy's Cove
Nova Scotia



CANADIAN TOURISM DATA
collective



DESTINATION
CANADA

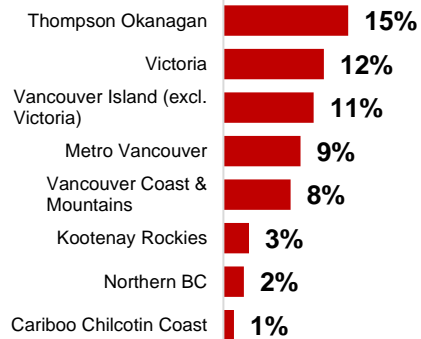
IN-PROVINCE TRAVELLERS



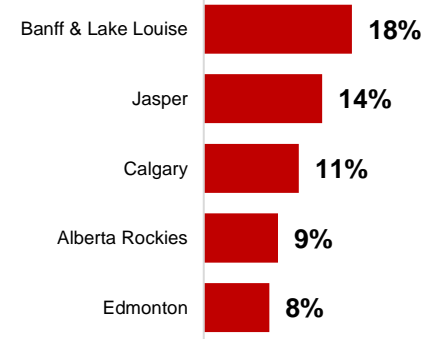
UNAIDED CONSIDERATION (NEXT YEAR) – CITIES/REGIONS

Banff & Lake Louise is the most popular region being considered on an unaided basis among in-province travellers in Western Canada.

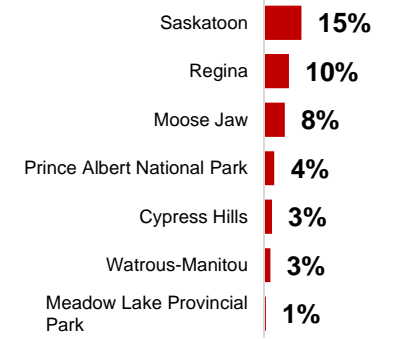
British Columbia Total (n=761)



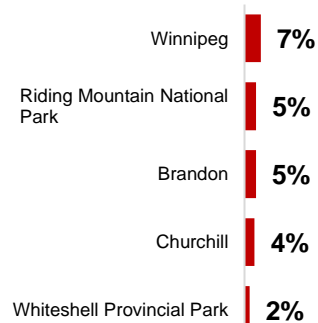
Alberta Total (n=765)



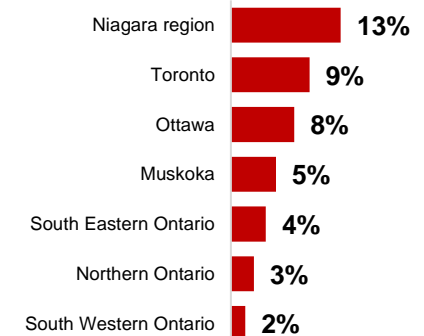
Saskatchewan Total (n=253)



Manitoba Total (n=255)



Ontario Total (n=1076)



Base: Canadian residents evaluating in-province destinations
If you are planning to take a vacation trip of 1 or more nights within [PROVINCE] in the next year, which destinations are you seriously considering? (Please list up to 3 destinations)

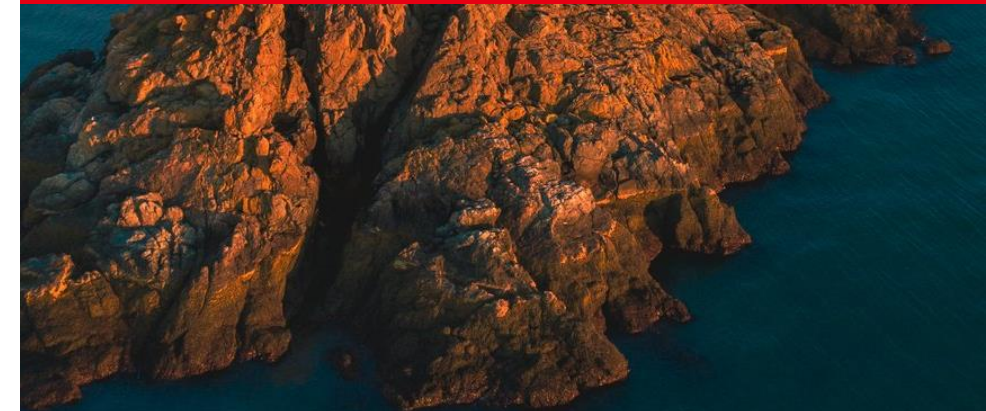



UNAIDED CONSIDERATION (NEXT YEAR) – CITIES/REGIONS (CONTINUED)

Total In-Province



In the East, St John's/Northeast Avalon Peninsula Region and Québec are also popular destinations being considered on an unaided basis among travellers within the respective province.

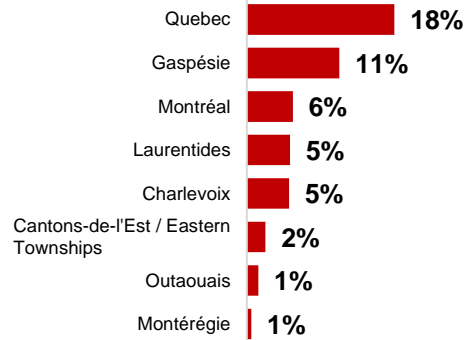


 **Grand Manan Island**
New Brunswick

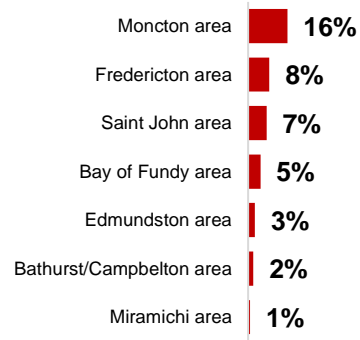
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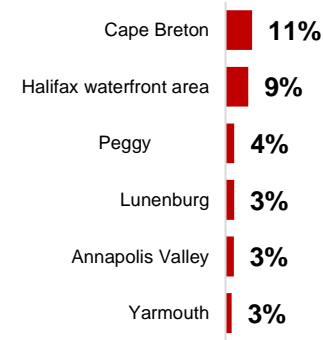
Québec Total (n=788)



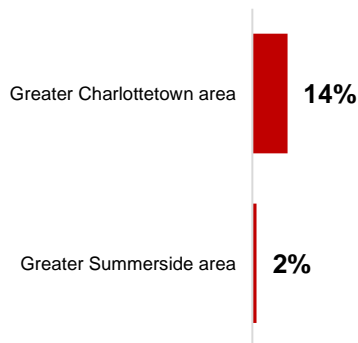
New Brunswick Total (n=205)



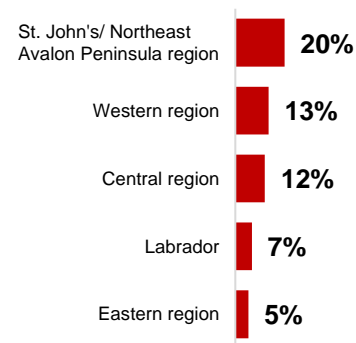
Nova Scotia Total (n=201)



Prince Edward Island Total (n=82)



Newfoundland and Labrador Total (n=206)



Winnipeg is the most popular among travellers within Manitoba actively planning their next vacation trip. In-province travellers are also actively planning their trips to Saskatoon, Calgary, and Regina.

NET ACTIVE PLANNING

| British Columbia | |
|---|-----|
| Metro Vancouver (n=476) | 10% |
| Thompson Okanagan (n=476) | 9% |
| Victoria (n=475) | 8% |
| Vancouver Island (excl. Victoria) (n=476) | 6% |
| Vancouver Coast & Mountains (n=476) | 5% |
| Northern BC (n=475) | 5% |
| Cariboo Chilcotin Coast (n=475) | 5% |
| Kootenay Rockies (n=476) | 3% |

| Saskatchewan | |
|-------------------------------------|-----|
| Saskatoon (n=161) | 16% |
| Regina (n=158) | 12% |
| Watrous-Manitou (n=158) | 7% |
| Moose Jaw (n=158) | 6% |
| Meadow Lake Provincial Park (n=157) | 4% |
| Nipawin-Tobin Lake (n=157) | 3% |
| Prince Albert National Park (n=156) | 3% |
| Cypress Hills (n=160) | 3% |

| Alberta | |
|-----------------------------|-----|
| Calgary (n=765) | 14% |
| Edmonton (n=765) | 13% |
| Jasper (n=765) | 8% |
| Banff & Lake Louise (n=765) | 8% |
| Alberta Rockies (n=765) | 7% |

| Manitoba | |
|---------------------------------------|-----|
| Winnipeg (n=255) | 20% |
| Brandon (n=255) | 10% |
| Riding Mountain National Park (n=255) | 7% |
| Whiteshell Provincial Park (n=255) | 6% |
| Churchill (n=255) | 4% |

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Canadian residents evaluating in-province destinations

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)



Arctic Bay

Nunavut

NET ACTIVE PLANNING (CONTINUED)

| Ontario | |
|-------------------------------|------------|
| Toronto (n=770) | 14% |
| Niagara region (n=770) | 9% |
| Ottawa (n=768) | 7% |
| Muskoka (n=768) | 7% |
| South Western Ontario (n=770) | 6% |
| Northern Ontario (n=767) | 6% |
| South Eastern Ontario (n=767) | 6% |

| Québec | |
|--|------------|
| Québec City (n=492) | 12% |
| Montréal (n=494) | 10% |
| Gaspésie (n=493) | 7% |
| Cantons-de-l'Est / Eastern Townships (n=492) | 7% |
| Outaouais (n=494) | 5% |
| Charlevoix (n=490) | 5% |
| Montréal (n=493) | 5% |
| Laurentides (n=492) | 5% |

Total In-Province



There is some interest in travelling to Toronto and Québec City within their respective province.



NET ACTIVE PLANNING (CONTINUED)

The Greater Charlottetown area is the most popular city among travellers within PEI, and there is some interest in visiting St John's/Northeast Avalon Peninsula Region among Newfoundland & Labrador in-province travellers.

| New Brunswick | |
|----------------------------------|-----|
| Moncton area (n=128) | 10% |
| Saint John area (n=128) | 8% |
| Acadian Peninsula area (n=129) | 7% |
| Bathurst/Campbelton area (n=126) | 6% |
| Bay of Fundy area (n=129) | 5% |
| Fredericton area (n=129) | 4% |
| Edmundston (n=127) | 3% |
| Miramichi area (n=129) | 2% |

| Prince Edward Island | |
|---|-----|
| Greater Charlottetown area (n=68) | 20% |
| Points East Coastal Drive region (n=68) | 10% |
| Greater Summerside area (n=69) | 9% |
| Green Gables Shore region (n=68) | 8% |
| Red Sands Shore region (n=69) | 5% |
| North Cape Coastal Drive region (n=68) | 3% |

| Nova Scotia | |
|---------------------------------|-----|
| Cape Breton (n=126) | 10% |
| Halifax waterfront area (n=125) | 10% |
| Annapolis Valley (n=126) | 8% |
| Bay of Fundy (n=126) | 6% |
| Peggy's Cove (n=126) | 6% |
| Lunenburg (n=125) | 6% |
| Pictou (n=126) | 4% |
| Yarmouth (n=125) | 3% |

| Newfoundland & Labrador | |
|---|-----|
| St. John's/ Northeast Avalon Peninsula region (n=173) | 16% |
| Central region (n=171) | 9% |
| Other Avalon Peninsula region (n=173) | 7% |
| Western region (n=172) | 6% |
| Labrador (n=172) | 5% |
| Eastern region (n=169) | 5% |

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Canadian residents evaluating in-province destinations

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)



Arctic Bay

Nunavut



TRAVEL INTENTIONS

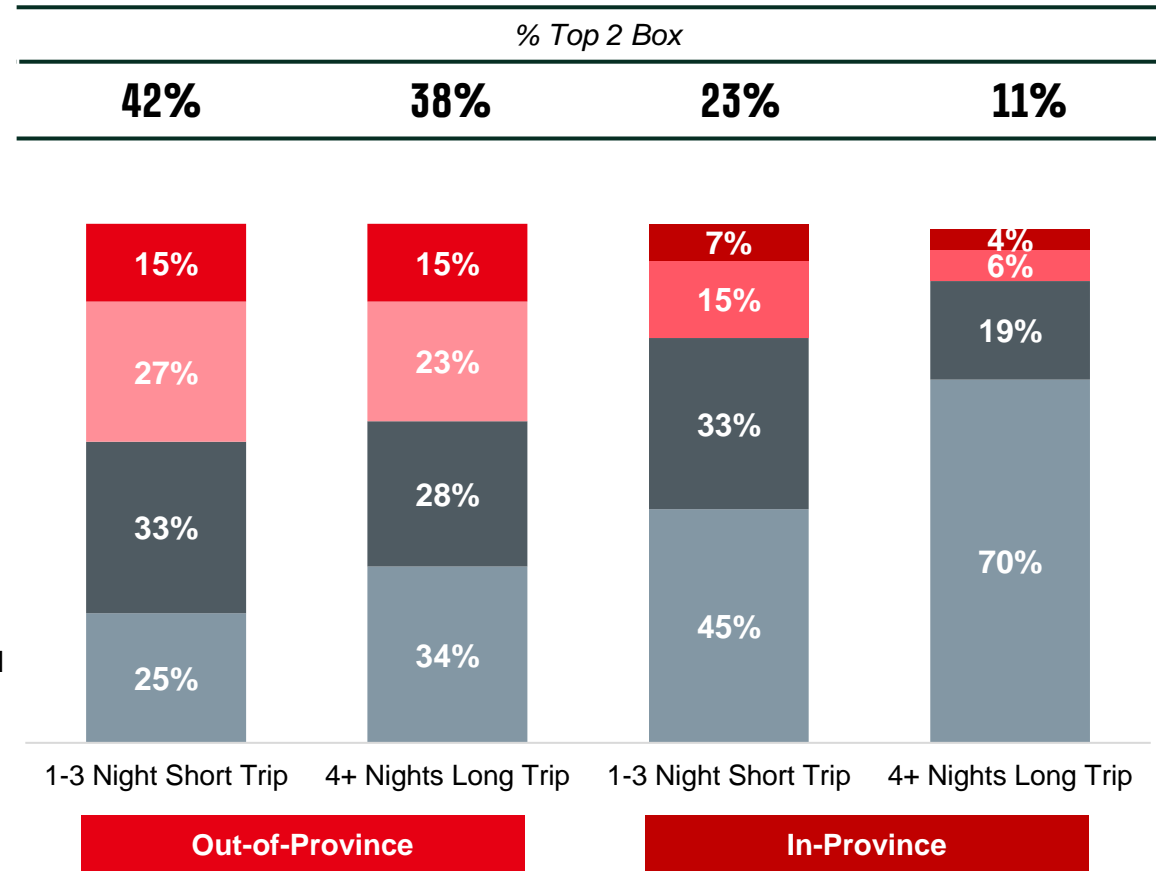


Tablelands
Newfoundland & Labrador



LIKELIHOOD TO TAKE A DOMESTIC TRIP (NEXT YEAR)

Over half of Canadian residents are interested in taking an out-of-province trip in the next year for any number of nights, meanwhile in-province travellers prefer shorter trips.



Definitely/ Very likely for any number of nights
56% OUT-OF-PROVINCE
27% IN-PROVINCE

Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Canadian residents evaluating in-province destinations
Realistically, how likely are you to take a vacation trip [outside of your own province, but within Canada / within your province] in the next year? (Select one)

TIME OF YEAR INTERESTED IN TAKING A DOMESTIC TRIP (NEXT 2 YEARS)

Total Out-of-Province



| Province/Territory | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|---------------------------------|---------------------------|---------------------------|---------------------------|--------------------------|
| British Columbia (n=681) | 20% | 34% | 62% | 42% |
| Whistler (n=122) | 22% | 26% | 37% | 31% |
| Vancouver (n=265) | 20% | 39% | 59% | 36% |
| Victoria (n=185) | 16% | 40% | 59% | 45% |
| Kootenay Rockies (n=156) | 14% | 37% | 59% | 38% |
| Thompson Okanagan (n=171) | 14% | 25% | 55% | 35% |
| Alberta (n=518) | 21% | 37% | 62% | 37% |
| Banff & Lake Louise (n=215) | 21% | 34% | 51% | 37% |
| Alberta Rockies (n=164) | 16% | 37% | 71% | 42% |
| Calgary (n=171) | 16% | 34% | 66% | 38% |
| Jasper (n=144) | 16% | 25% | 53% | 31% |
| Edmonton (n=152) | 13% | 42% | 61% | 40% |
| Saskatchewan (n=141) | 24% | 35% | 54% | 36% |
| Regina (n=53) | 15% | 24% | 59% | 19% |
| Saskatoon (n=59) | 14% | 23% | 60% | 39% |

Out-of-province travellers are most likely to take a trip during the summer months, however destinations such as Victoria, the Alberta Rockies, and Edmonton are popular during the fall months.



Note: all respondents evaluated 2 destinations they are considering (rated 4 or 5 out of 5) from the competitive set. Base: Domestic out-of-province travellers, Considering [DESTINATION] What time of year would you consider taking a vacation trip to these destinations in the next year? (Select all that apply)



TIME OF YEAR INTERESTED IN TAKING A DOMESTIC TRIP (NEXT 2 YEARS) (CONTINUED)

Total Out-of-Province



While Ontario, New Brunswick and Québec are popular during the summer months, there is opportunity to expand on trips to Winnipeg and Québec City during the fall months, as well as Churchill and Mont Tremblant in the winter months.

| Province/Territory | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|------------------------------|---------------------------|---------------------------|---------------------------|--------------------------|
| Manitoba (n=149) | 25% | 30% | 53% | 34% |
| Winnipeg (n=76) | 17% | 40% | 69% | 45% |
| Churchill (n=35*) | 35% | 33% | 26% | 19% |
| Ontario (n=525) | 14% | 35% | 63% | 31% |
| Ottawa (n=148) | 21% | 39% | 48% | 36% |
| Muskoka (n=60) | 16% | 23% | 63% | 31% |
| Northern Ontario (n=54) | 13% | 27% | 58% | 31% |
| Niagara Falls (n=156) | 11% | 34% | 65% | 32% |
| Toronto (n=223) | 9% | 32% | 63% | 32% |
| Québec (n=372) | 24% | 36% | 59% | 37% |
| Mont Tremblant (n=72) | 30% | 25% | 38% | 31% |
| Québec City (n=157) | 26% | 36% | 60% | 45% |
| Montréal (n=227) | 24% | 47% | 60% | 40% |
| New Brunswick (n=267) | 12% | 24% | 67% | 32% |
| Fredericton (n=81) | 4% | 28% | 66% | 35% |
| Saint John (n=101) | 12% | 25% | 58% | 40% |

Note: all respondents evaluated 2 destinations they are considering (rated 4 or 5 out of 5) from the competitive set.
 Base: Domestic out-of-province travellers, Considering [DESTINATION]
 What time of year would you consider taking a vacation trip to these destinations in the next year? (Select all that apply)
 *Small base size, interpret with caution (n<50)

TIME OF YEAR INTERESTED IN TAKING A DOMESTIC TRIP (NEXT 2 YEARS) (CONTINUED)

| <u>Province/Territory</u> | Winter <i>(Dec, Jan, Feb)</i> | Spring <i>(Mar, Apr, May)</i> | Summer <i>(Jun, Jul, Aug)</i> | Fall <i>(Sept, Oct, Nov)</i> |
|--|---|---|---|--|
| Nova Scotia (n=409) | 13% | 26% | 60% | 34% |
| Halifax (n=204) | 17% | 31% | 66% | 42% |
| Cape Breton (n=121) | 10% | 26% | 61% | 39% |
| Prince Edward Island (n=339) | 13% | 24% | 69% | 31% |
| Charlottetown (n=157) | 6% | 19% | 64% | 30% |
| Newfoundland & Labrador (n=273) | 10% | 25% | 66% | 40% |
| St. John's (n=117) | 6% | 29% | 71% | 34% |
| Yukon (n=123) | 18% | 28% | 57% | 34% |
| Whitehorse (n=58) | 21% | 25% | 49% | 29% |
| Dawson City (n=41*) | 11% | 29% | 64% | 53% |
| Northwest Territories (n=95) | 31% | 31% | 48% | 36% |
| Yellowknife (n=66) | 18% | 28% | 53% | 24% |
| Inuvik (n=40*) | 17% | 43% | 48% | 32% |
| Nunavut (n=99) | 27% | 37% | 52% | 34% |
| Iqaluit (n=46*) | 7% | 20% | 68% | 40% |

Note: all respondents evaluated 2 destinations they are considering (rated 4 or 5 out of 5) from the competitive set.
 Base: Domestic out-of-province travellers, Considering [DESTINATION]
 What time of year would you consider taking a vacation trip to these destinations in the next year? (Select all that apply)
 *Small base size, interpret with caution (n<50)



Atlantic provinces Nova Scotia, PEI, Newfoundland and Labrador are popular during the summer months, with room to grow in Nunavut and the Northwest Territories during the winter and fall months.



TIME OF YEAR INTERESTED IN TAKING A DOMESTIC TRIP (NEXT 2 YEARS)

| Province/Territory | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|---|---------------------------|---------------------------|---------------------------|--------------------------|
| British Columbia | | | | |
| Vancouver Coast & Mountains (n=117) | 31% | 44% | 65% | 40% |
| Kootenay Rockies (n=56) | 25% | 31% | 57% | 43% |
| Cariboo Chilcotin Coast (n=59) | 23% | 40% | 69% | 40% |
| Metro Vancouver (n=156) | 21% | 46% | 54% | 42% |
| Thompson Okanagan (n=151) | 21% | 49% | 72% | 55% |
| Northern BC (n=58) | 19% | 39% | 68% | 45% |
| Victoria (n=153) | 19% | 49% | 57% | 39% |
| Vancouver Island (excl. Victoria) (n=153) | 13% | 50% | 67% | 51% |
| Alberta | | | | |
| Banff & Lake Louise (n=171) | 27% | 42% | 69% | 40% |
| Calgary (n=149) | 25% | 39% | 53% | 32% |
| Edmonton (n=136) | 23% | 40% | 52% | 34% |
| Jasper (n=160) | 22% | 42% | 67% | 47% |
| Alberta Rockies (n=202) | 14% | 43% | 75% | 49% |

Total In-Province



Travellers taking a trip within their province are most likely to go during the summer months. There is also some interest in taking a trip within British Columbia and Alberta during the spring and fall months.



Note: all respondents evaluated 2 destinations they are considering (rated 4 or 5 out of 5) from the competitive set. Base: Canadian residents evaluating in-province destinations, Considering [DESTINATION] What time of year would you consider taking a vacation trip to these destinations in the next year? (Select all that apply)



TIME OF YEAR INTERESTED IN TAKING A DOMESTIC TRIP (NEXT 2 YEARS) (CONTINUED)

| Province/Territory | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|---|---------------------------|---------------------------|---------------------------|--------------------------|
| Ontario | | | | |
| South Western Ontario (n=82) | 24% | 34% | 52% | 42% |
| Niagara region (n=278) | 23% | 32% | 66% | 43% |
| Toronto (n=242) | 23% | 40% | 58% | 39% |
| Ottawa (n=143) | 22% | 42% | 62% | 38% |
| Northern Ontario (n=97) | 17% | 29% | 65% | 36% |
| Muskoka (n=191) | 14% | 34% | 73% | 58% |
| South Eastern Ontario (n=131) | 14% | 34% | 72% | 44% |
| Québec | | | | |
| Laurentides (n=436) | 29% | 24% | 52% | 36% |
| Québec City (n=228) | 23% | 25% | 58% | 27% |
| Montréal (n=137) | 22% | 25% | 50% | 28% |
| Outaouais (n=73) | 17% | 28% | 45% | 32% |
| Cantons-de-l'Est / Eastern Townships (n=98) | 13% | 19% | 61% | 32% |
| Charlevoix (n=102) | 11% | 22% | 58% | 36% |
| Gaspésie (n=160) | 5% | 10% | 69% | 24% |

Total In-Province



Travellers within Ontario and Québec are also most interested in taking a domestic trip in the summer months.



TIME OF YEAR INTERESTED IN TAKING A DOMESTIC TRIP (NEXT 2 YEARS) (CONTINUED)

| <u>Province/Territory</u> | Winter (Dec, Jan, Feb) | Spring (Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sept, Oct, Nov) |
|---------------------------|---------------------------|---------------------------|---------------------------|--------------------------|
| Saskatchewan | | | | |
| Saskatoon (n=74) | 33% | 35% | 54% | 34% |
| Regina (n=64) | 15% | 44% | 69% | 38% |
| Manitoba | | | | |
| Winnipeg (n=96) | 19% | 21% | 58% | 26% |
| New Brunswick | | | | |
| Moncton area (n=59) | 18% | 32% | 58% | 33% |

Note: all respondents evaluated 2 destinations they are considering (rated 4 or 5 out of 5) from the competitive set.
 Base: Canadian residents evaluating in-province destinations, Considering [DESTINATION]
 What time of year would you consider taking a vacation trip to these destinations in the next year? (Select all that apply)
 Cities with base sizes too small to report: (Saskatchewan: Watrous-Manitou, Nipawin-Tobin Lake, Moose Jaw, Cypress Hills, Meadow Lake Provincial Park, Prince Albert National Park), (Manitoba: Churchill, Brandon, Whiteshell Provincial Park, Riding Mountain Provincial Park), (New Brunswick: Fredericton, Miramichi Area, Edmundston Area, Bay of Fundy Area, Acadian Peninsula Area, Saint John Area, Bathurst/Campbelton Area), (Newfoundland & Labrador: Eastern Region, Western Region, Other Avalon Peninsula Region, Central Region, St John's/Northeast Avalon Peninsula Region), (Nova Scotia: Halifax Waterfront Area, Annapolis Valley, Peggy's Cove, Yarmouth, Bay of Fundy, Pictou, Lunenburg, Cape Breton)

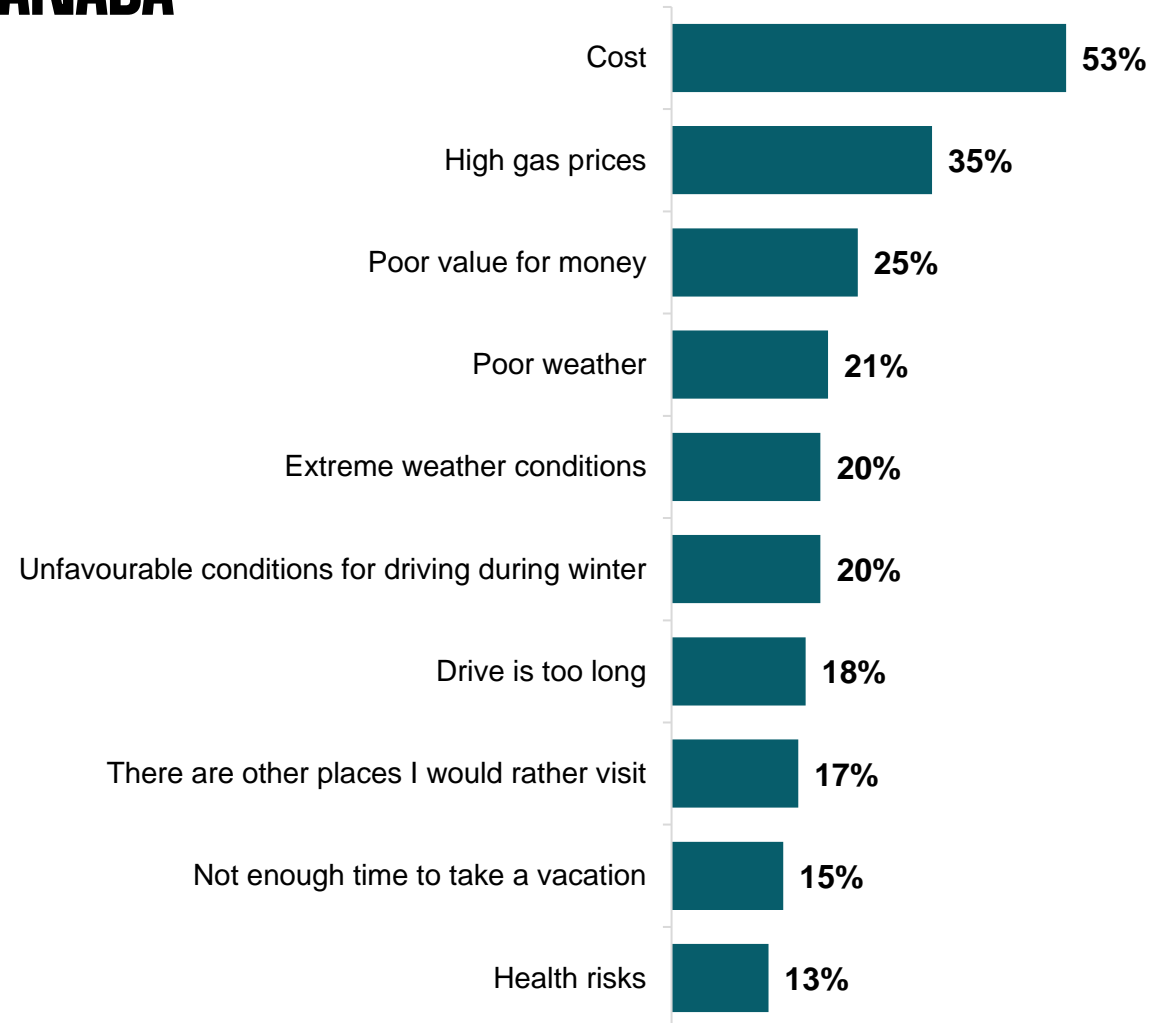


Travellers within Saskatchewan and Manitoba are most interested in taking a domestic trip in the summer months.



TOP 10 BARRIERS FOR TRAVELLING WITHIN CANADA

Cost was the greatest deterrent for travelling within Canada – including high gas prices, and poor value for money. Weather is also a concern including poor weather, extreme conditions, or unfavourable conditions for driving.



Southern Lakes Resort

Yukon

Base: Canadian residents 18+ (n=9250)
Which of the following factors might prevent you from travelling within Canada? (Select all that apply)

INDIGENOUS TOURISM ACTIVITIES

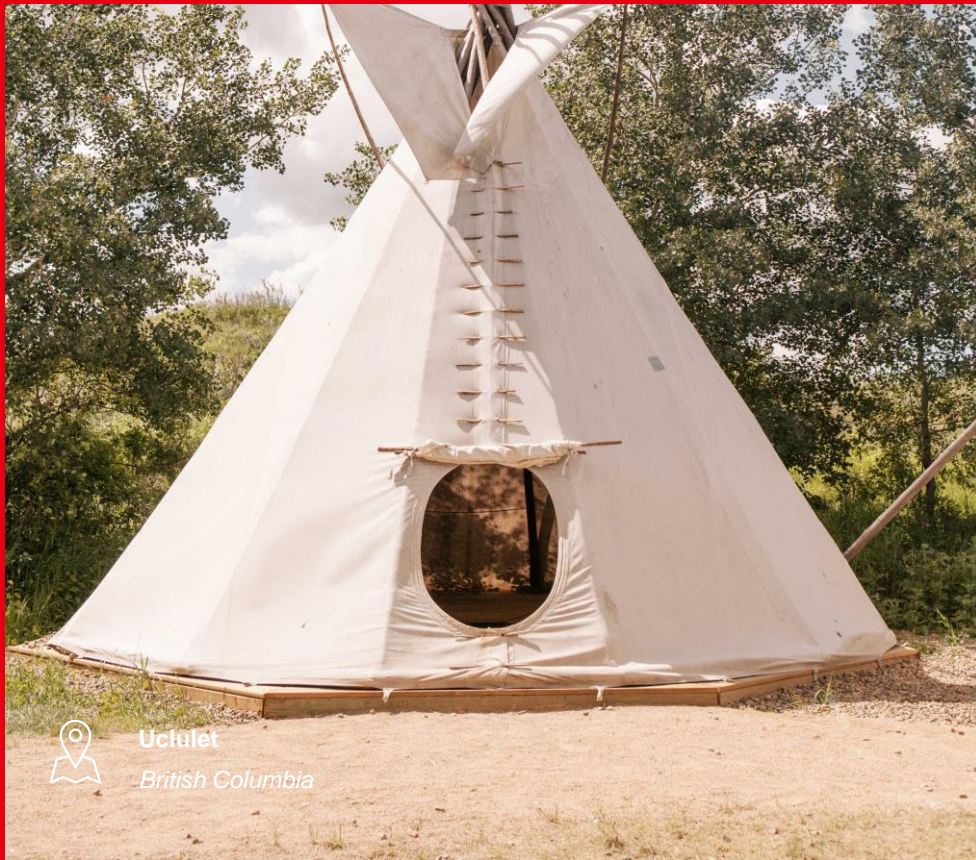
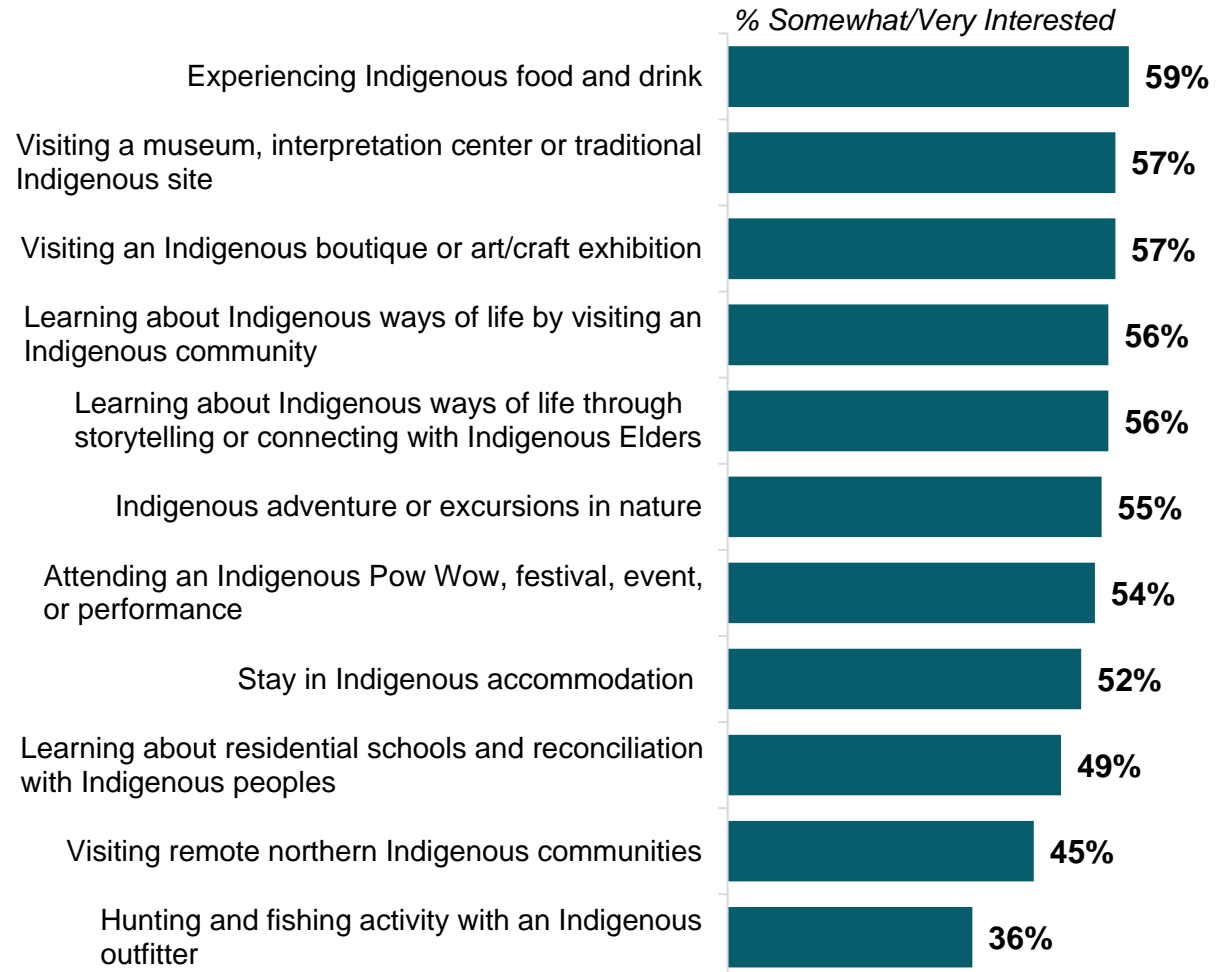


British Columbia



Canadians are most interested in experiencing Indigenous culture through food and drink as well as visiting cultural centers such as a museum, and boutique/craft exhibitions.

INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES



Uclulet
British Columbia

MOST RECENT TRIP

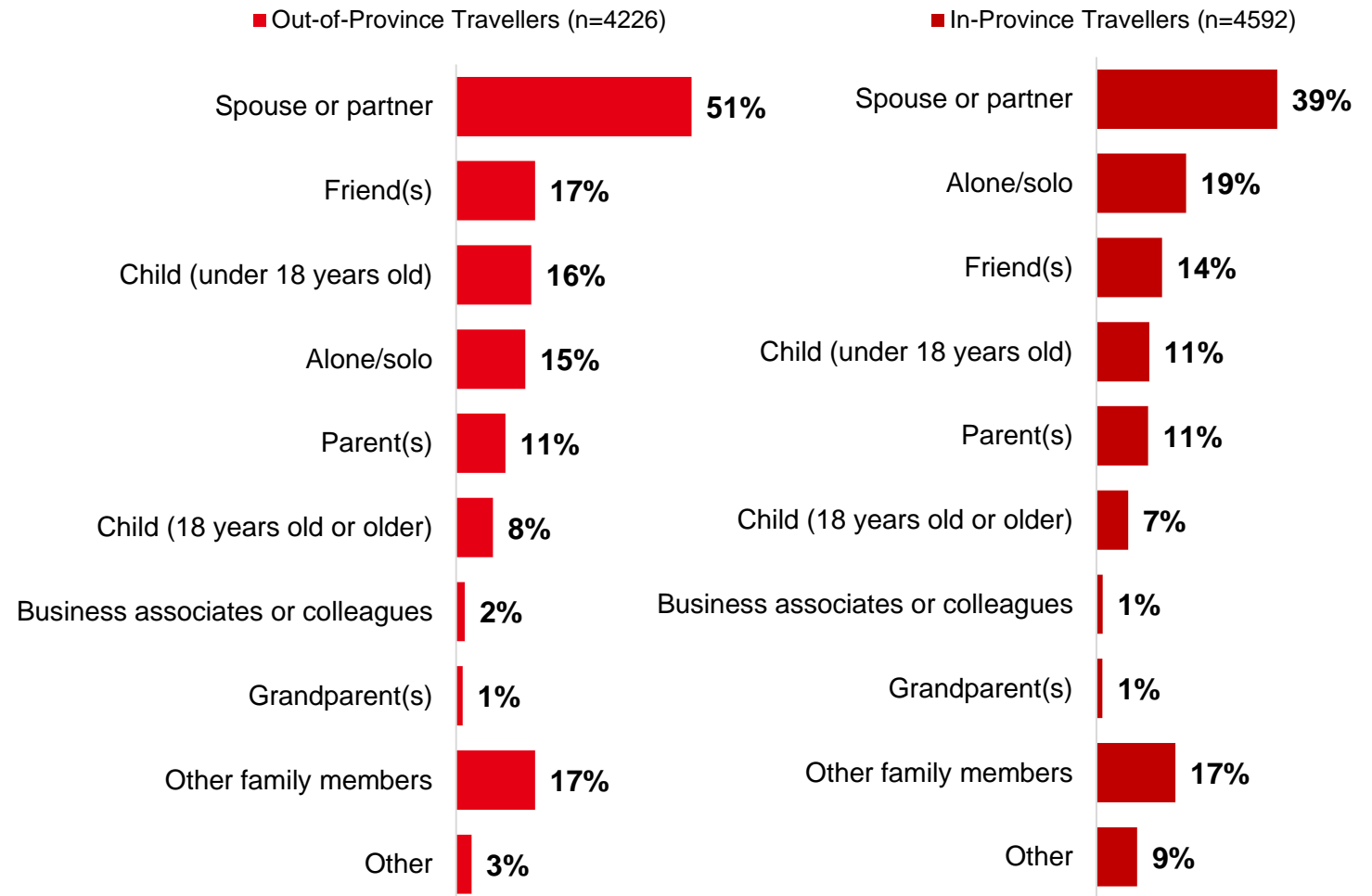


Jasper
Alberta



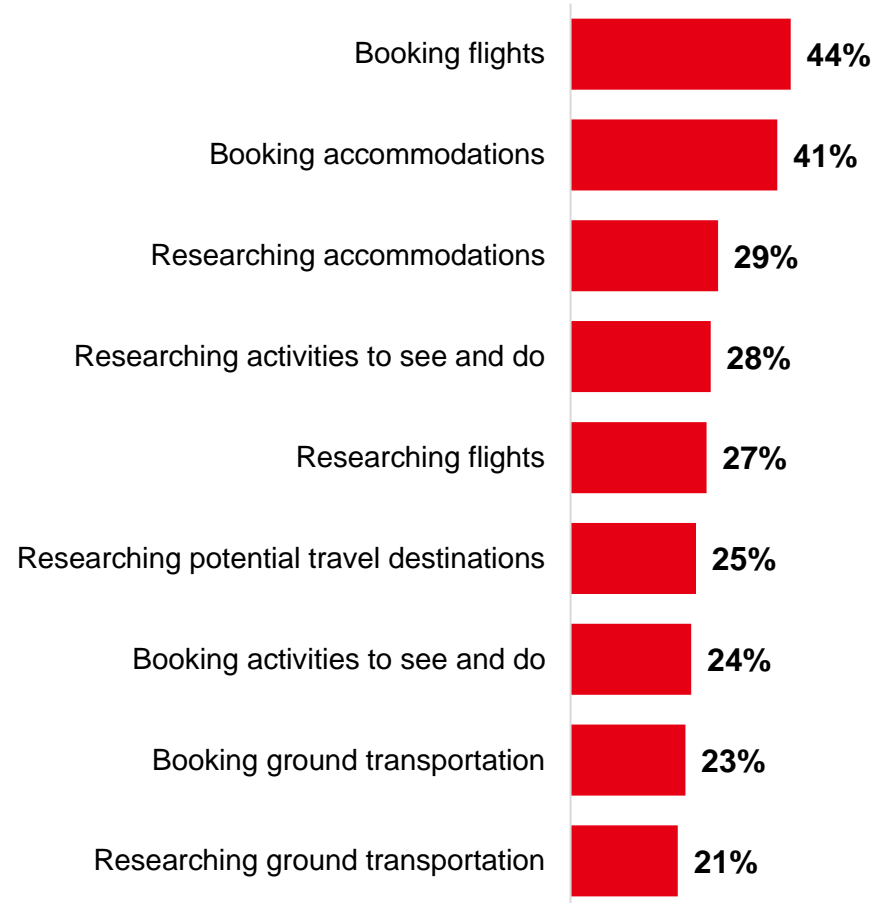
TRAVEL PARTY OF RECENT TRIP

Spouses or partners were the most common travel companion among both out-of-province and in-province travellers. Out-of-province travellers also preferred travelling with friends or children, while in-province travellers were more likely to go solo.



Base: Canadian residents 18+
With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP



13%
of Out-of-Province Travellers used a travel agent

Total Out-of-Province

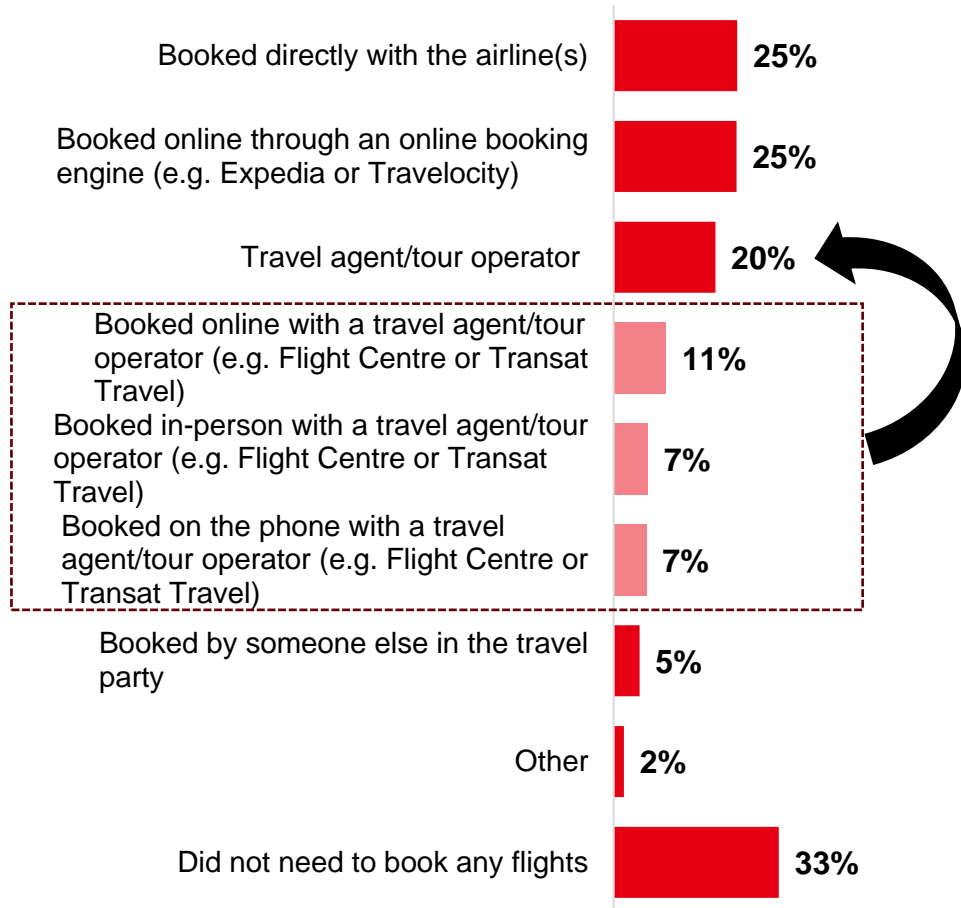


Over one in ten out-of-province travellers used a travel agent, most commonly for booking flights or accommodations.

Base: Domestic out-of-province travellers, Travelled to any destination, Used a Travel Agent/Tour Operator
 Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
 Which of the following did a travel agent or tour operator help you with?



BOOKING FLIGHTS FOR RECENT TRIP



Total Out-of-Province



CANADIAN TOURISM DATA
collective

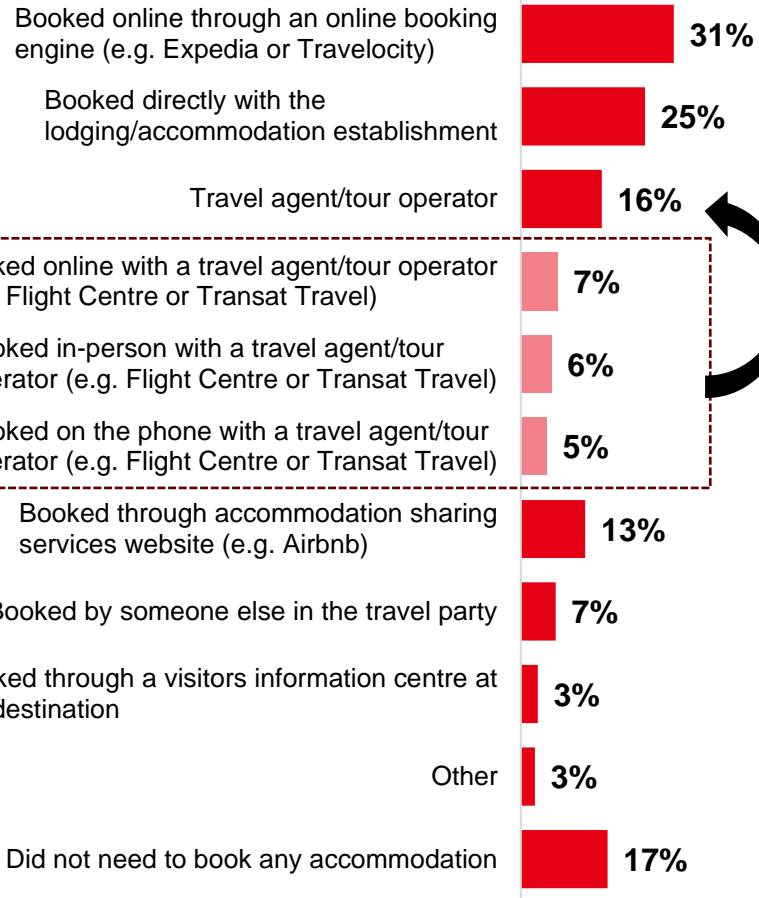


When booking flights, out-of-province travellers were most likely to book directly with the airlines or through an online travel booking engine.

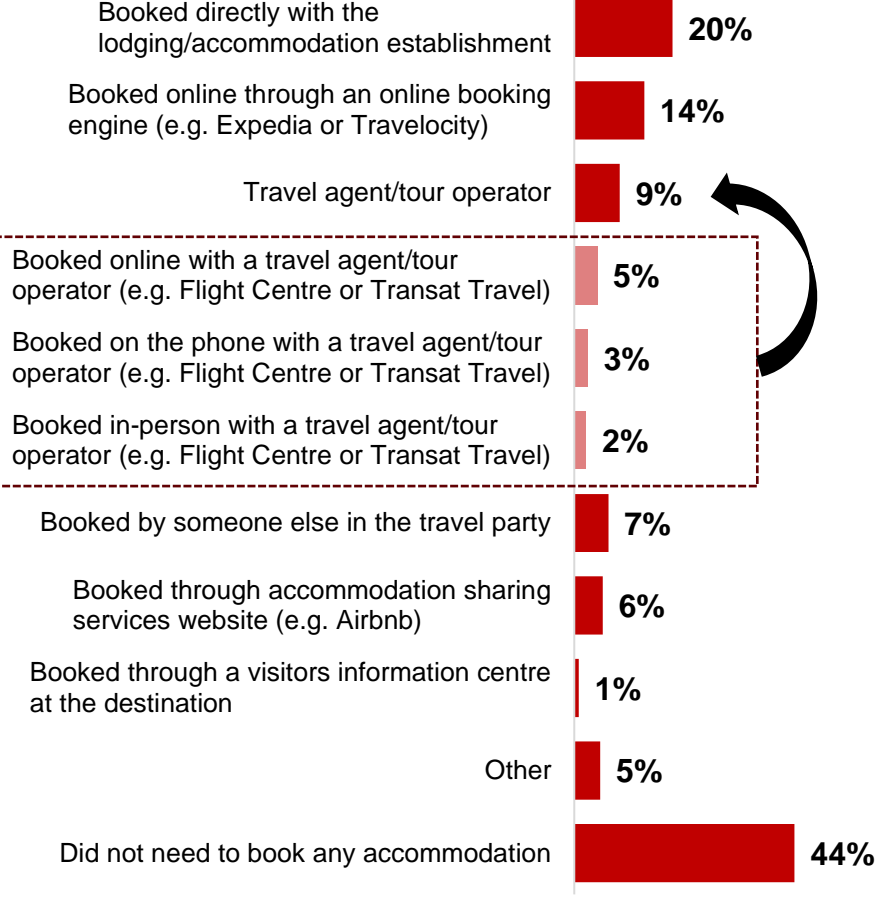


BOOKING ACCOMMODATION FOR RECENT TRIP

Out-of-Province Travellers (n=4226)



In-Province Travellers (n=4592)



When booking accommodations, out-of-province travellers were more likely to book online, whereas in-province travellers book directly with the accommodation.

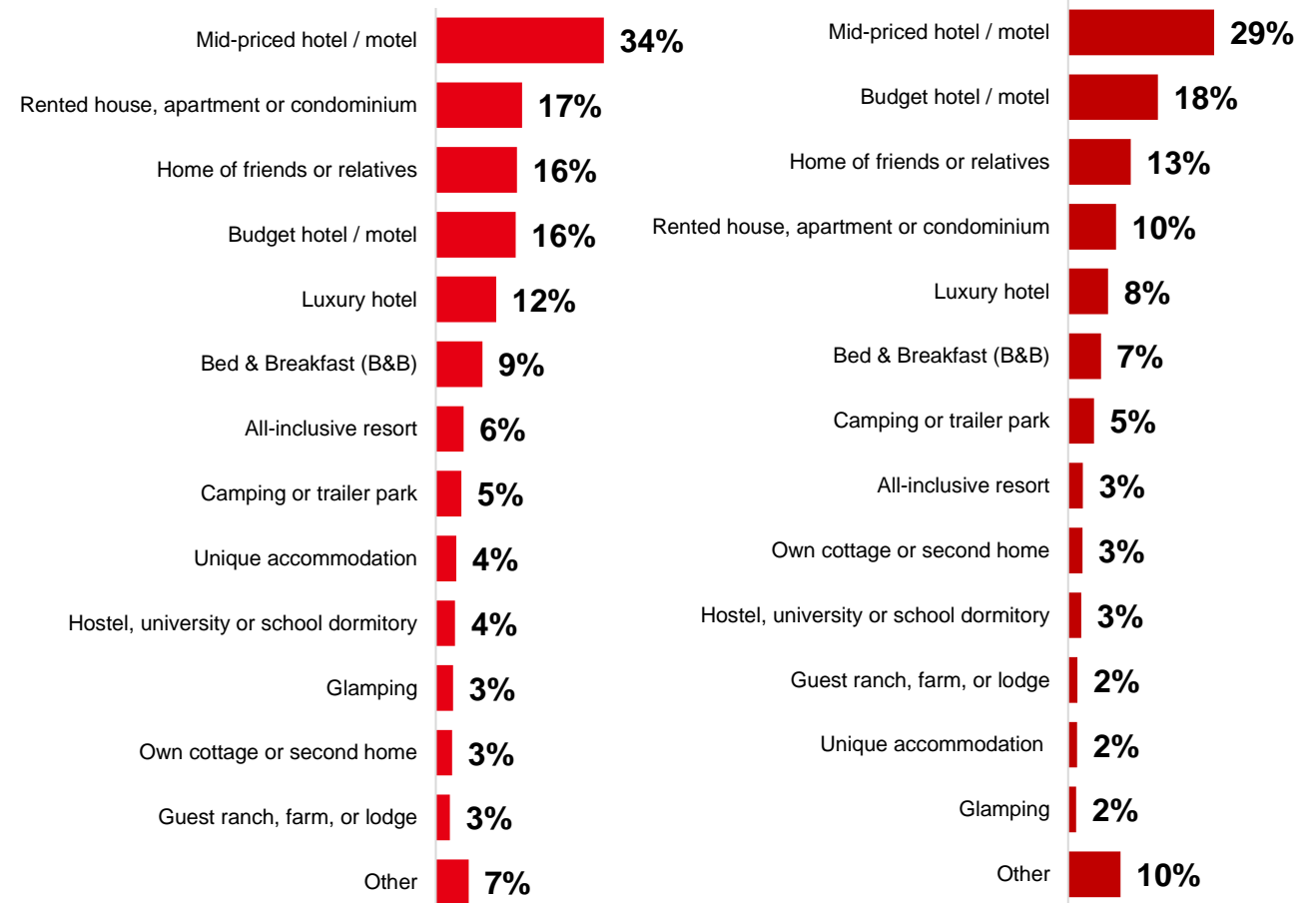


TYPE OF ACCOMMODATIONS FOR RECENT TRIP

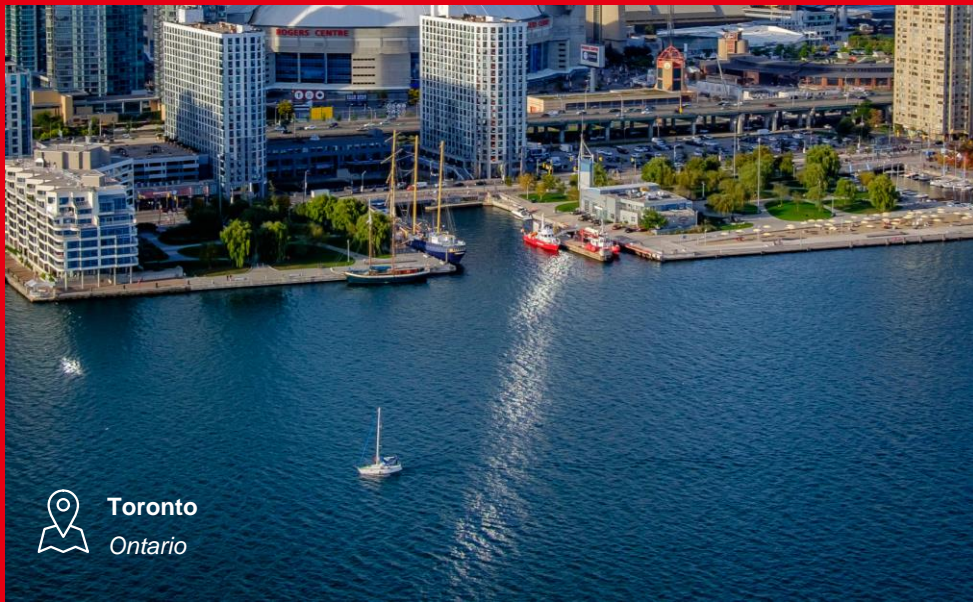
Mid-priced hotels/motels were popular among all travellers, though out-of-province travellers preferred rented accommodations or staying with friends/relatives, while in-province travellers opted for a budget hotel/motel.

■ Out-of-Province Travellers (n=3450)

■ In-Province Travellers (n=2465)



Base: Canadian residents 18+, Travelled to any destination, Booked Accommodation F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



TOP 10 ACTIVITIES PARTICIPATED IN DURING TRIP TO CANADA

Overall, travellers to Canada were interested in both nature and culture, such as nature walks, trying local cuisine, and visiting natural attractions.

28%

Nature Walks

15%

Shopping for Clothes and Shoes

27%

Trying Local Food And Drink

15%

Hiking

24%

Natural Attractions

14%

Shopping for items that help me remember my trip

20%

Local Markets

14%

Fine dining

19%

Nature Parks

14%

City green spaces like parks or gardens

Base: Canadian residents 18+, Travelled to any destination (n=8818)
Which of the following activities, if any, did you participate in during your recent trip in Canada? (Select all that apply)



THANK YOU

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



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