

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

US HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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STUDY OVERVIEW: UNITED STATES MARKET

Target Population

The target population are residents who are aged 18 years or more, who have taken a vacation outside of their own state and stayed at least one night in a paid accommodation in the last three years or are thinking about doing so in the next two years.

Timing of fieldwork

December 4th-15th 2023

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). The project has also been migrated over to YouGov's proprietary panel. As a result, no trending is available for the US market.

Key Insights



Canada continues to be a leading international destination among Americans, with next 2-year immediate potential for Canada being 53.6M



Potential visitors to Canada are more likely to consider a visit during the Summer months



Travellers are interested in unique local experiences and natural attractions



Travellers to Canada in the past 3 years were mostly on vacation with a significant other, friends, or with children



There is a high level of interest in Indigenous culture, with potential visitors to Canada showing interest in Indigenous food and drink, cultural sites, and adventures

MARKET SIZING



Kyle
Saskatchewan



OUT-OF-STATE PLEASURE TRAVELLER SIZING



Total population aged 18 years or more¹

260,962,000

X

Incidence rate: Out-of-state pleasure travellers who have taken a trip in the past 3 years or plan to in the next 2 years and current passport holders/intenders²

56.6%

=



Size of the Out-of-State Pleasure Traveller Population

147,704,500

This study was conducted among out-of-state pleasure travellers, represented by 147.7M Americans aged 18 years or more.



Essipit
Quebec

Base: General population aged 18+ (n=1150)

¹Source: Estimates 2022 American Community Survey, United States Census Bureau

²Note: Results are from 2023 YouGov Canada Omnibus Survey

SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



Total potential out-of-state pleasure travellers aged 18 years or more

147,704,500

X

Target Market for Canada

Those in the dream to purchase stages of the path to purchase for Canada

71.1%

=



Size of the target market

105,018,000

X

Immediate Potential for Canada

Will definitely/very likely visit Canada in the next 2 years¹

51.0%

=



Immediate potential

53,559,000

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)

7 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) Realistically, how likely are you to take a vacation trip to Canada in the **next 2 years**? (Select one)

¹Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more

The next 2-year immediate potential for Canada is 53.6 million out-of-state pleasure travellers.



Grand Manan Island
New Brunswick

United States GTRP –
December 2023

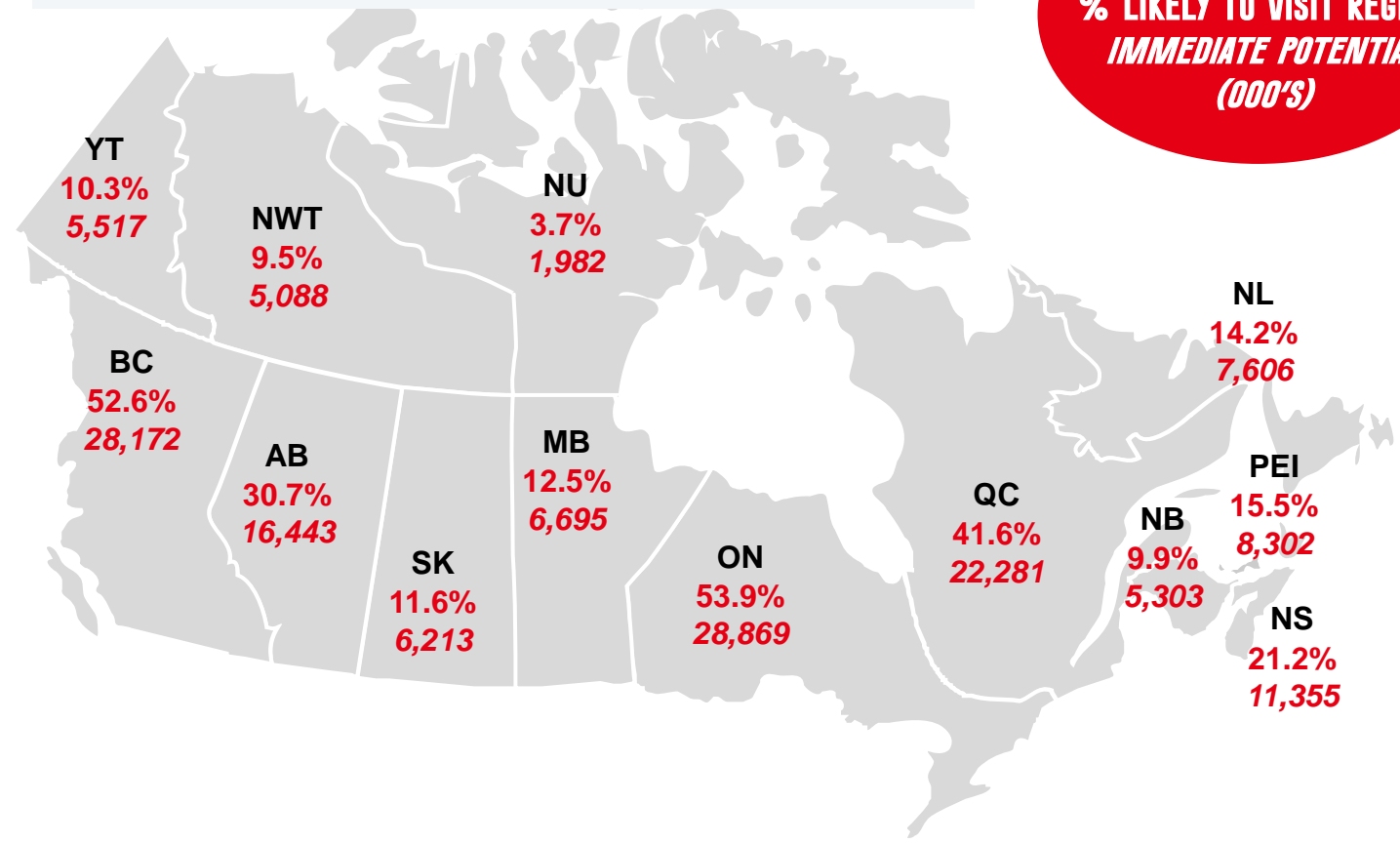


POTENTIAL MARKET SIZE FOR THE REGIONS

BC and Ontario each have the potential to draw in over 28 million American travellers over the next 2 years.

IMMEDIATE POTENTIAL FOR CANADA: 53,559,000

KEY:
% LIKELY TO VISIT REGION
IMMEDIATE POTENTIAL
(000'S)



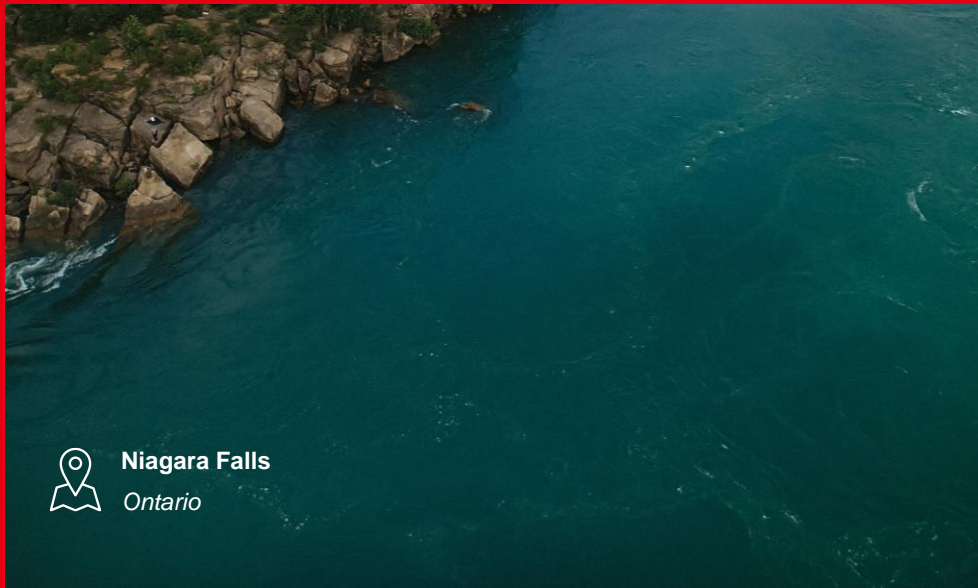
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=2919)
If you were to take a vacation trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Popular travel destinations include Toronto, Vancouver, Niagara Falls, Montréal, and Québec City.



 **Niagara Falls**
Ontario

British Columbia	
Vancouver	35%
Victoria	22%
Rocky Mountains	20%
Whistler	10%
Okanagan	4%
Other – BC	5%

Alberta	
Rocky Mountains	16%
Calgary	14%
Banff	14%
Edmonton	9%
Jasper	8%
Other – AB	2%

Ontario	
Toronto	39%
Niagara Falls	33%
Ottawa	18%
Muskoka	5%
Other – ON	6%

Quebec	
Montréal	31%
Québec City	26%
Mont Tremblant	7%
Other – QC	4%

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)
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Saskatoon	6%
Regina	4%
Other – SK	2%

Manitoba	
Winnipeg	7%
Churchill	6%
Other – MB	2%

New Brunswick	
Saint John	5%
Fredericton	4%
Other – NB	2%

Nova Scotia	
Halifax	13%
Cape Breton	8%
Other - NS	6%

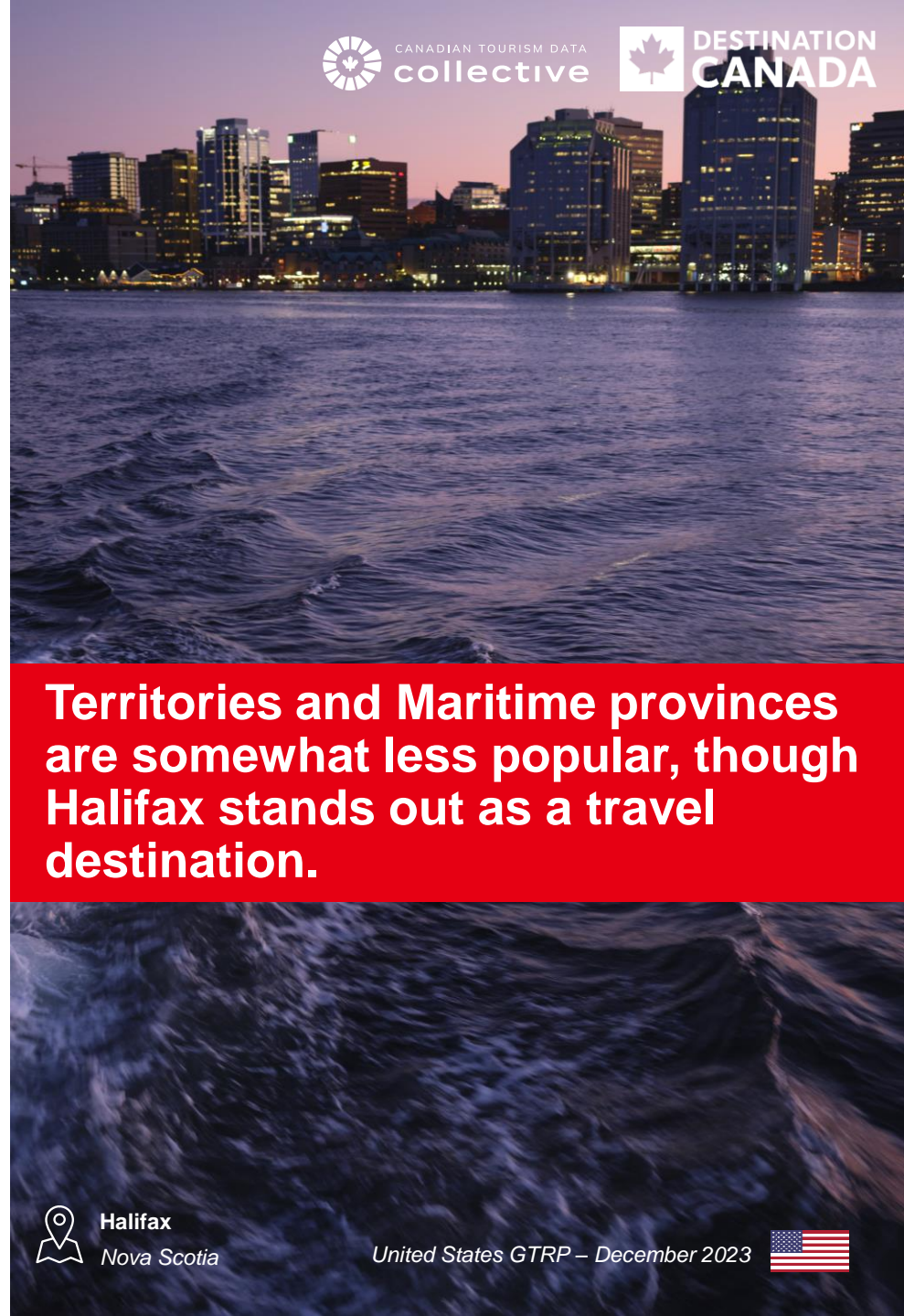
Prince Edward Island	
Charlottetown	9%
Other - PEI	5%

Newfoundland & Labrador	
St. John's	9%
Other - NL	6%

Yukon	
Whitehorse	5%
Dawson City	4%
Other – YT	2%

Northwest Territories	
Yellowknife	6%
Inuvik	4%
Other – NWT	2%

Nunavut	
Iqaluit	2%
Other – NU	1%



Territories and Maritime provinces are somewhat less popular, though Halifax stands out as a travel destination.

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

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	10%	19%	28%	17%
Alberta	6%	11%	17%	10%
Saskatchewan	3%	5%	5%	3%
Manitoba	3%	5%	6%	4%
Ontario	8%	20%	30%	18%
Quebec	7%	14%	23%	14%
New Brunswick	2%	4%	5%	4%
Nova Scotia	3%	7%	12%	7%
Prince Edward Island	3%	5%	8%	5%
Newfoundland & Labrador	2%	5%	8%	5%
Yukon	3%	4%	5%	3%
Northwest Territories	2%	3%	5%	3%
Nunavut	1%	1%	2%	1%



Out-of-state travellers likely to visit Canada in the next 2 years are most likely considering a visit during the summer months. There is opportunity to shift this peak season demand to shoulder seasons such as fall and winter.



Peggy's Cove
Nova Scotia



CANADIAN TOURISM DATA
collective



DESTINATION
CANADA

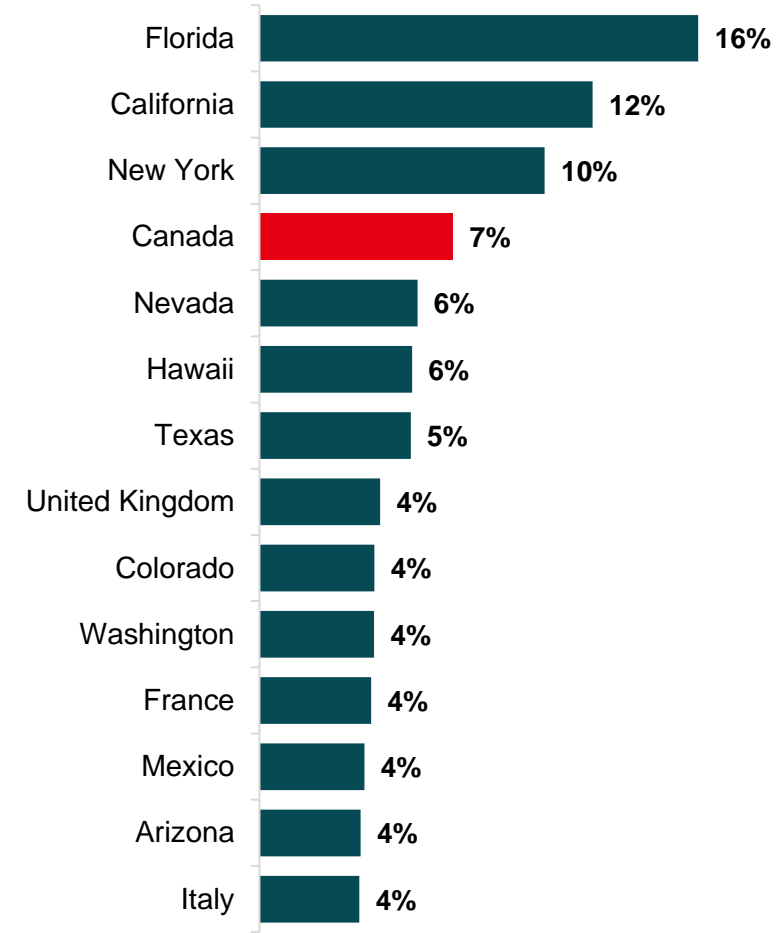
CONSIDERING CANADA AS A TRAVEL DESTINATION

United States GTRP – December 2023



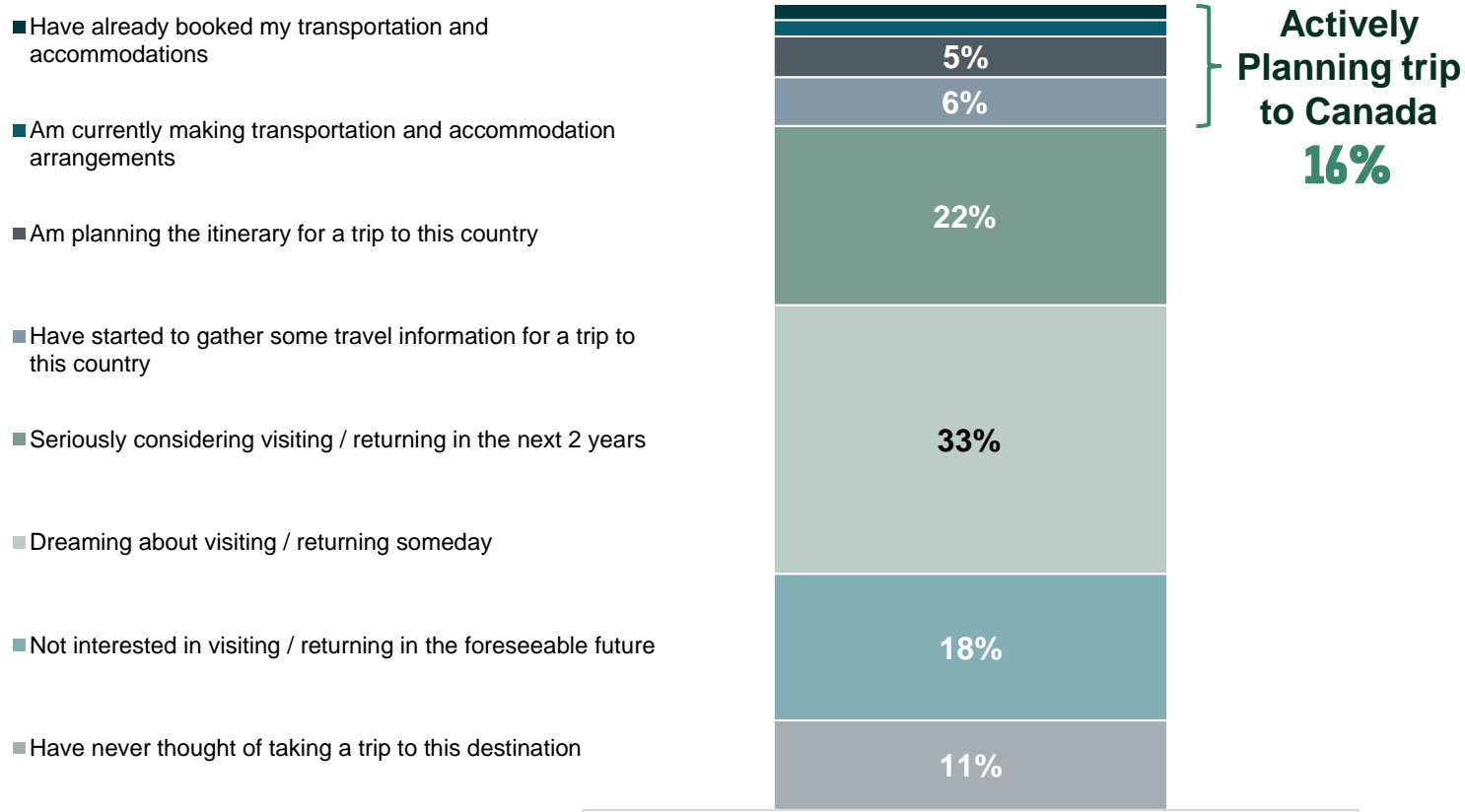
UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

On an unaided basis, American respondents are most often considering Florida, California, and New York for future travel destinations, while Canada was the highest-ranking destination outside of the US.



Base: Out-of-state travellers (past 3 years or next 2 years) (n=4171)
 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)
¹Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

STAGE IN THE PURCHASE CYCLE FOR CANADA



Sixteen percent of out-of-state travellers are actively planning a trip to Canada.

Lake Louise
Alberta

United States GTRP – December 2023



TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

62%

Trying Local Food and Drink

61%

Natural Attractions

60%

Nature Walks

57%

Oceanside Beaches

51%

Local Markets

50%

Historical, Archaeological or World Heritage Sites

50%

Nature Parks

48%

Viewing Wildlife or Marine Life

46%

Food and Drink Festivals or Events

44%

Fall Colors



Out-of-state pleasure travellers are most interested in experiences that are unique to the location they are travelling to and that embrace nature.



Winnipeg
Manitoba

United States GTRP
– December 2023



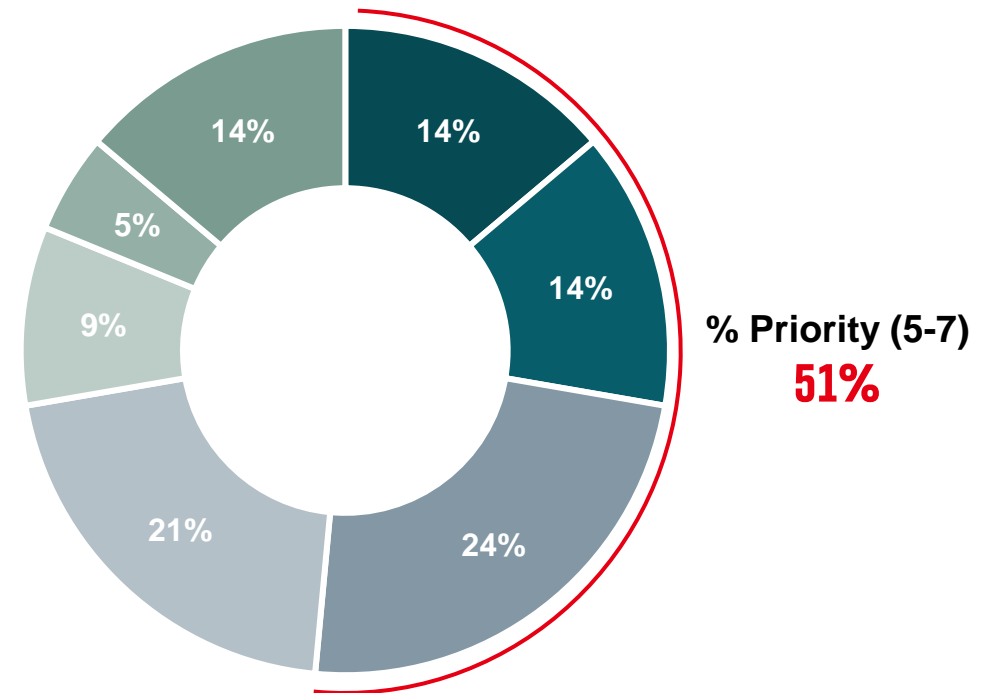
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Out-of-state travellers (past 3 years or next 2 years) (n= 4171)
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

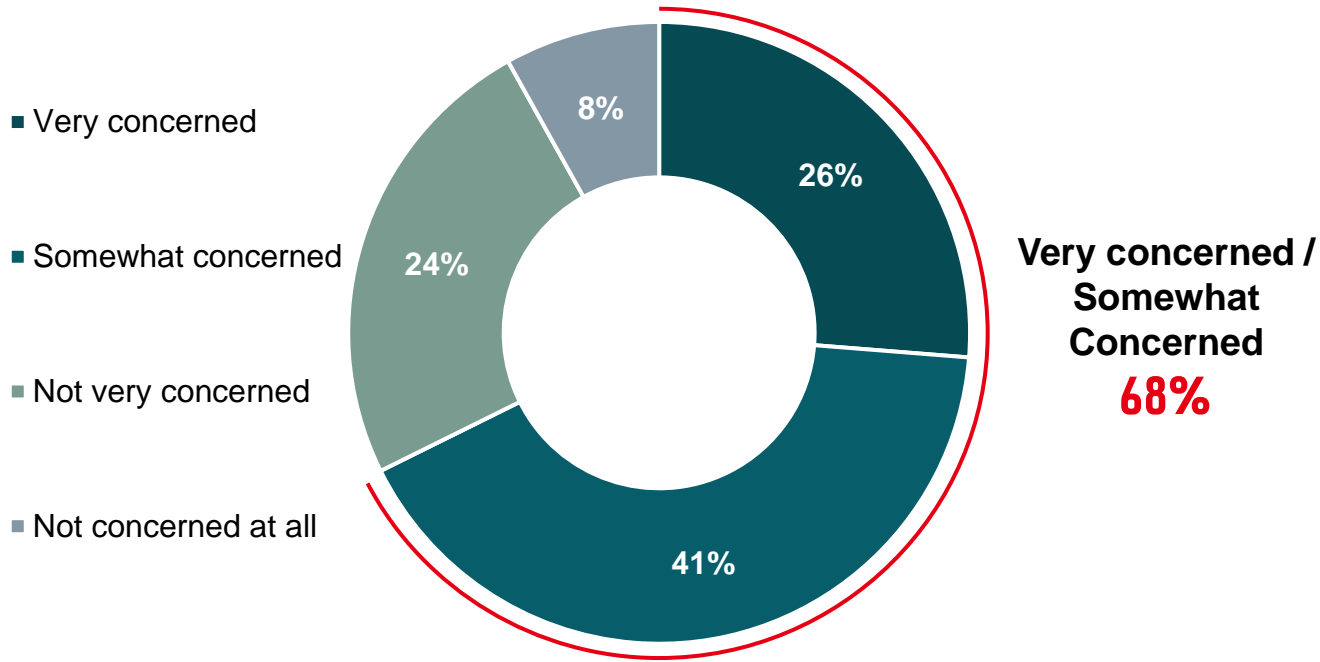
Half of respondents consider sustainable travel to be a priority during trip planning.



Nahanni
Northwest Territories

Base: Out-of-state travellers (past 3 years or next 2 years) (n=4171)
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'.
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".

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



25% Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Out-of-state travellers (past 3 years or next 2 years) (n=2066)
 How concerned are you about extreme weather events affecting your travel plans?
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?
 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.
 *Source: <https://www.npr.org/2023/08/22/1195154996/some-of-canadas-wildfires-likely-made-worse-by-human-driven-climate-change>



With extreme weather events becoming more common such as Canadian wildfires worsened by climate change¹, over two-thirds of travellers are concerned about impact on their travel plans.



INDIGENOUS TOURISM ACTIVITIES

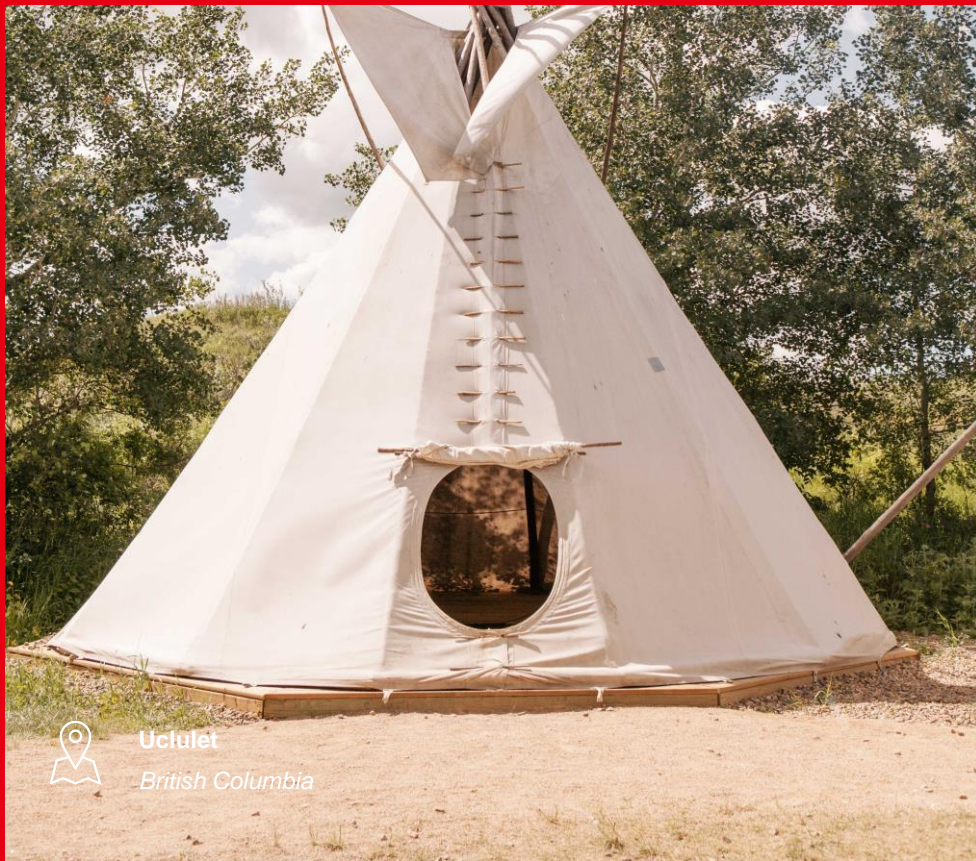


British Columbia



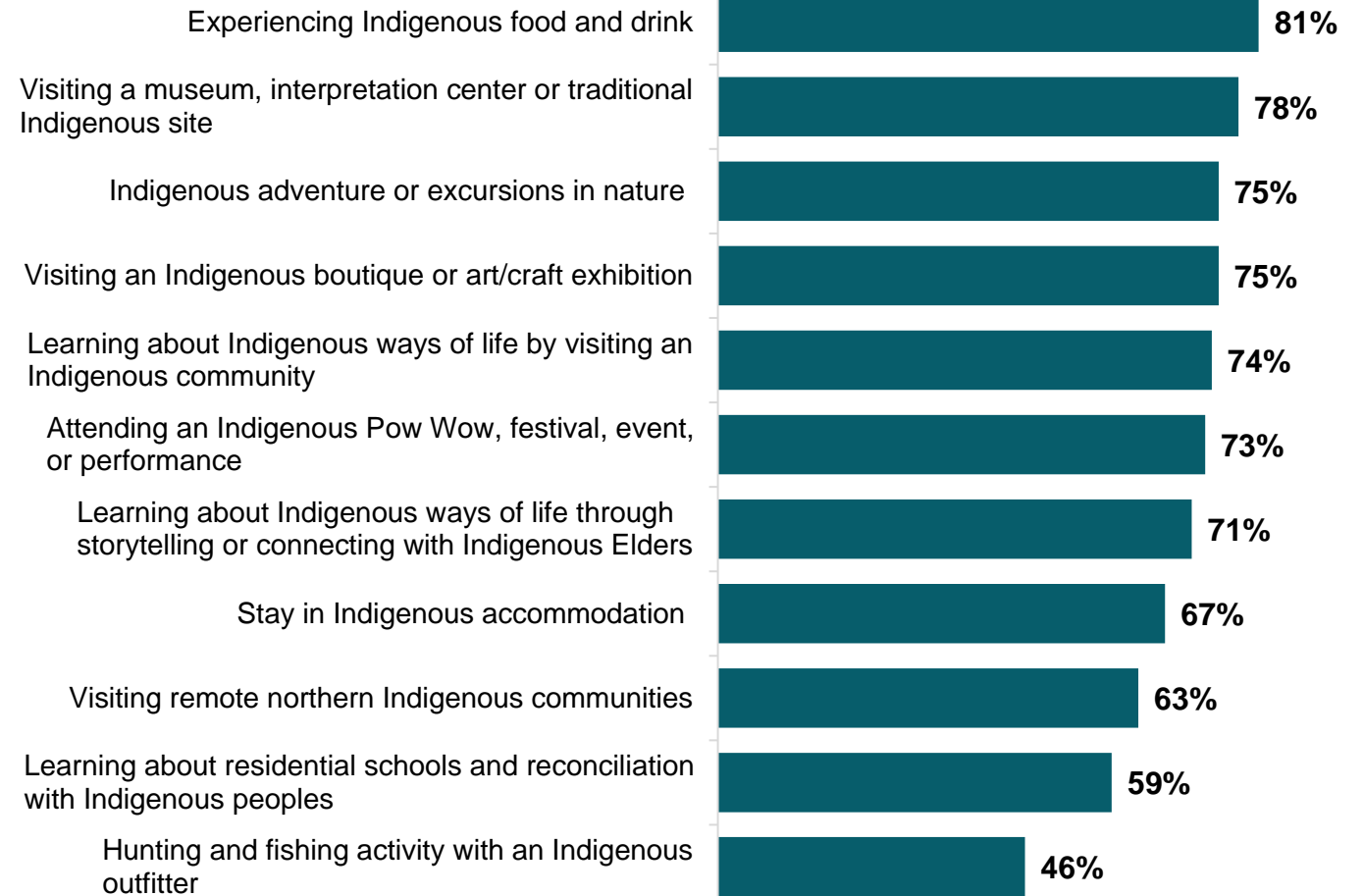
INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential visitors to Canada are eager to explore Indigenous cuisine and visit museums or cultural centers. There is interest in appreciating Indigenous culture, through nature activities, arts and crafts, and cultural events.



Uclulet
British Columbia

% Somewhat/Very Interested



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

TRIP TO CANADA IN THE PAST 3 YEARS



Jasper
Alberta



TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Nature and local experiences were the most popular activities among travellers to Canada in the past 3 years.

38%

Nature Walks

24%

Local Markets

36%

Trying Local Food and Drink

24%

Parks or Gardens

31%

Natural Attractions

23%

Nightlife

29%

Nature Parks

23%

Fine Dining

25%

Hiking

22%

Shopping for Clothes or Shoes

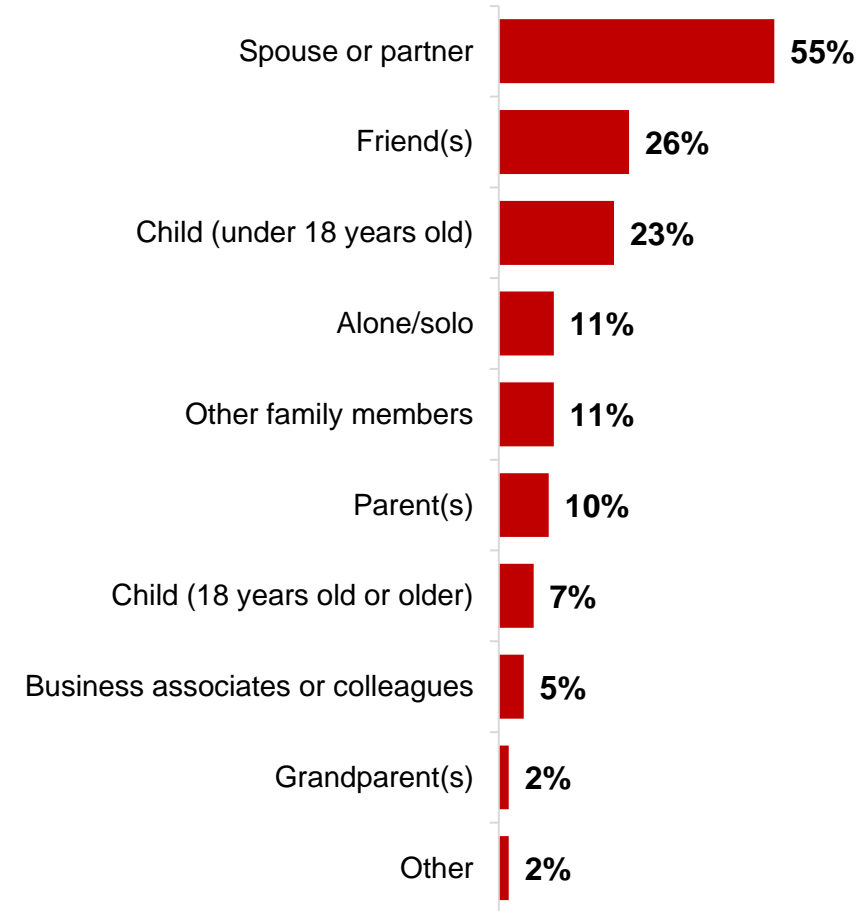
Base: Out-of-state travellers (past 3 years or next 2 years), Travellers to Canada (n=831)
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon
Alberta

TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

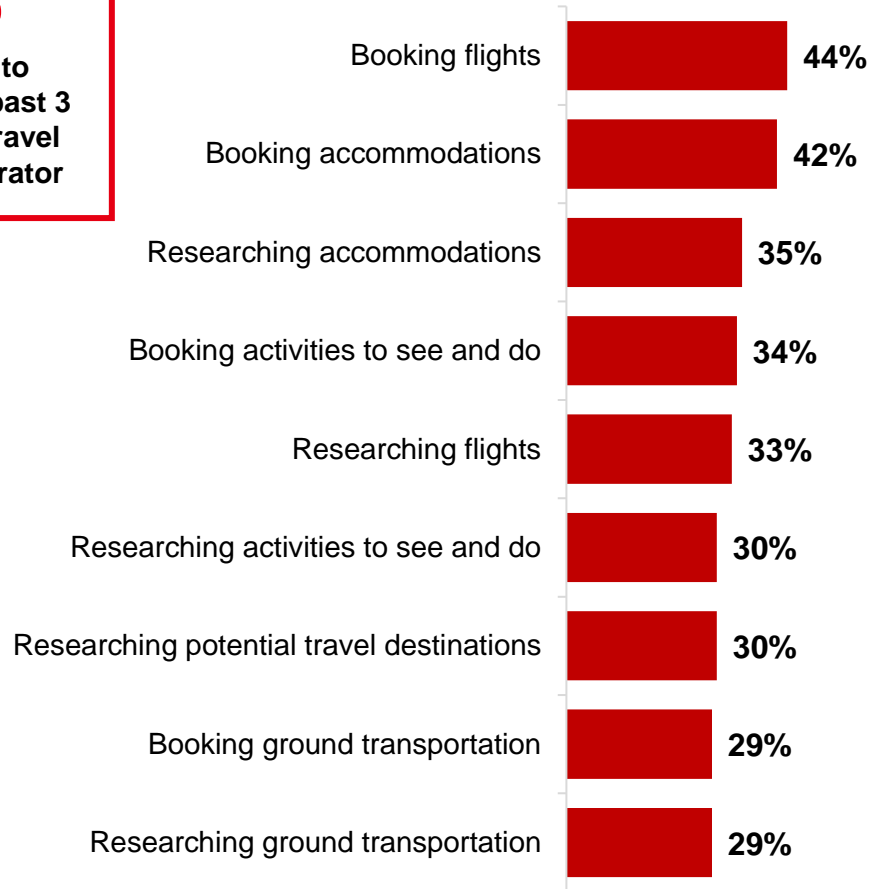
Most travellers to Canada came with a significant other. The next most common travel companions were friends and children under 18.



Base: Out-of-state travellers (past 3 years or next 2 years), Travellers to Canada (n=831)
With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

41%
of travellers to Canada in the past 3 years used a travel agent/tour operator



Overall, 2 in 5 travellers to Canada in the past 3 years used a travel agent/tour operator to research or book their trip. They were most likely to use a travel agent/tour operator when booking flights and accommodations.

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

ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

One in three travellers to Canada reported their whole trip was part of an organized group tour, while one in seven used group tours for a portion of their trip.

Yes, my whole trip was part of an organized group tour

31%

Yes, a portion of my trip was part of an organized group tour

14%

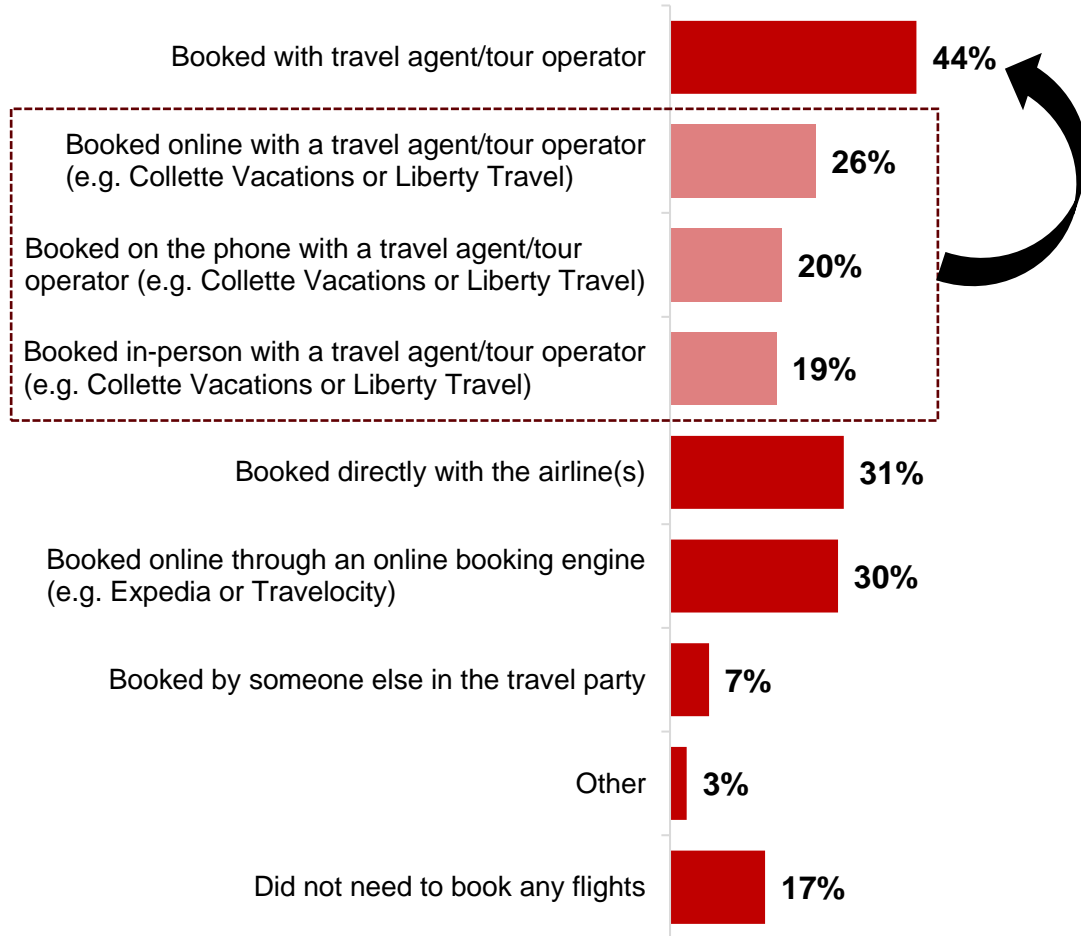
No

55%

Base: Out-of-state travellers (past 3 years or next 2 years), Travellers to Canada (n=831)
An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?



BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA

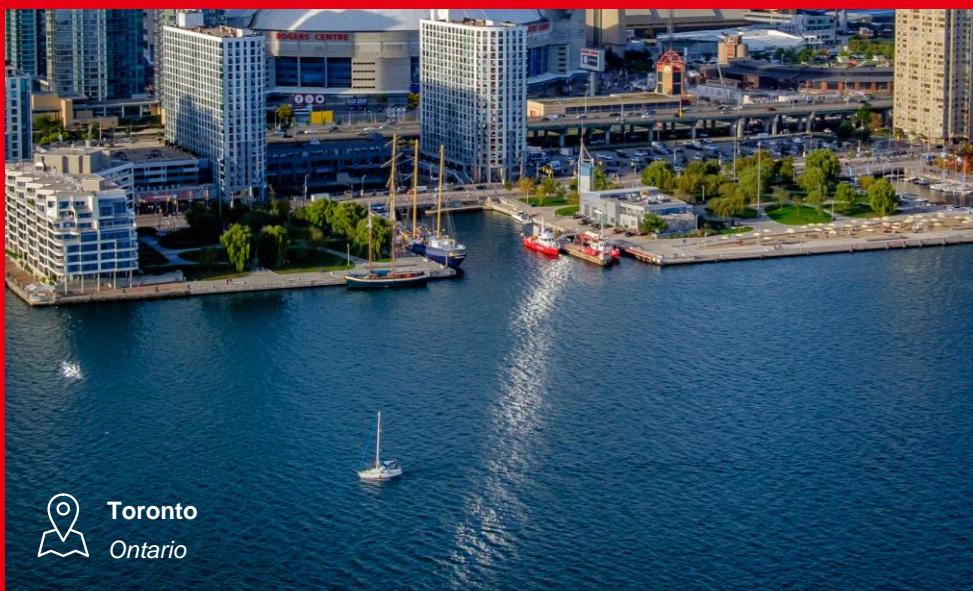
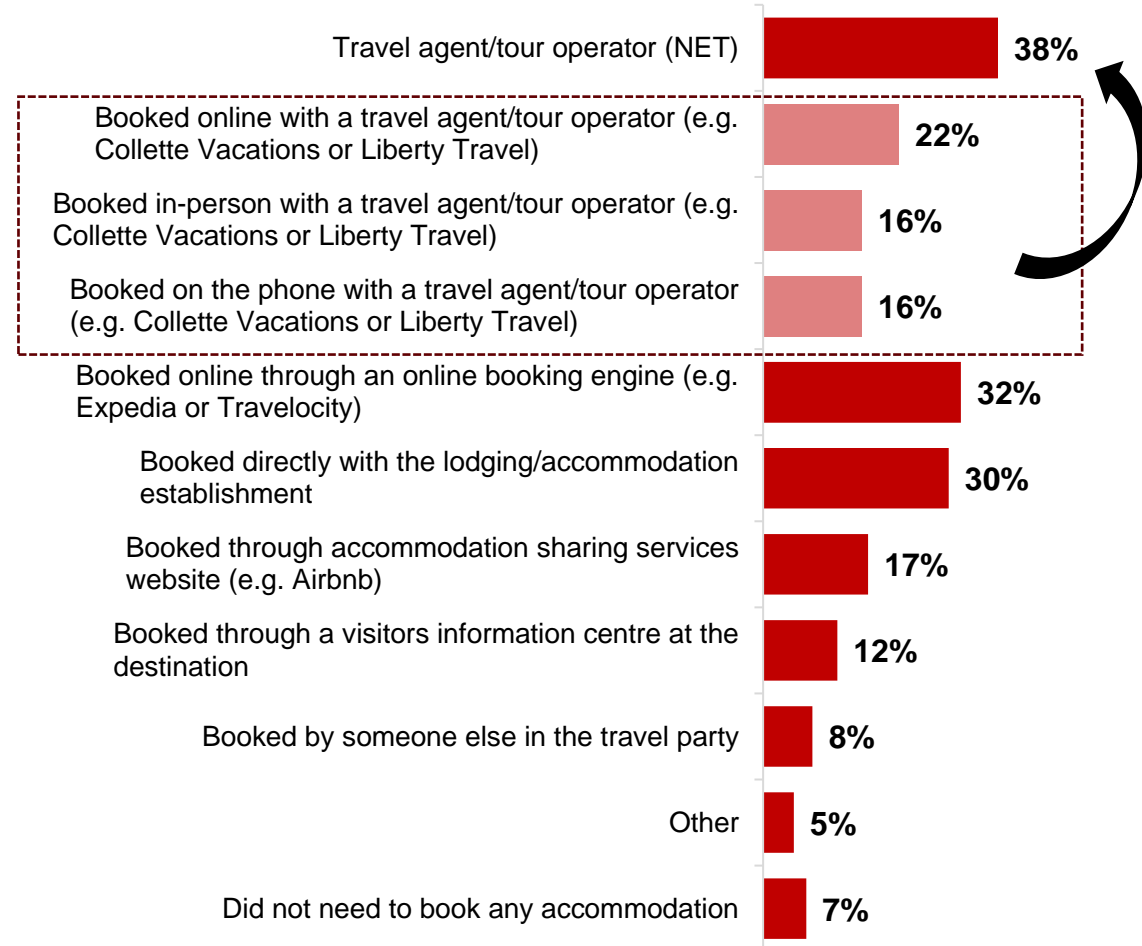


Nearly half of travellers to Canada booked flights using a travel agent/tour operator, with most booking online. Booking directly with the airline or through an online booking engine were also common.

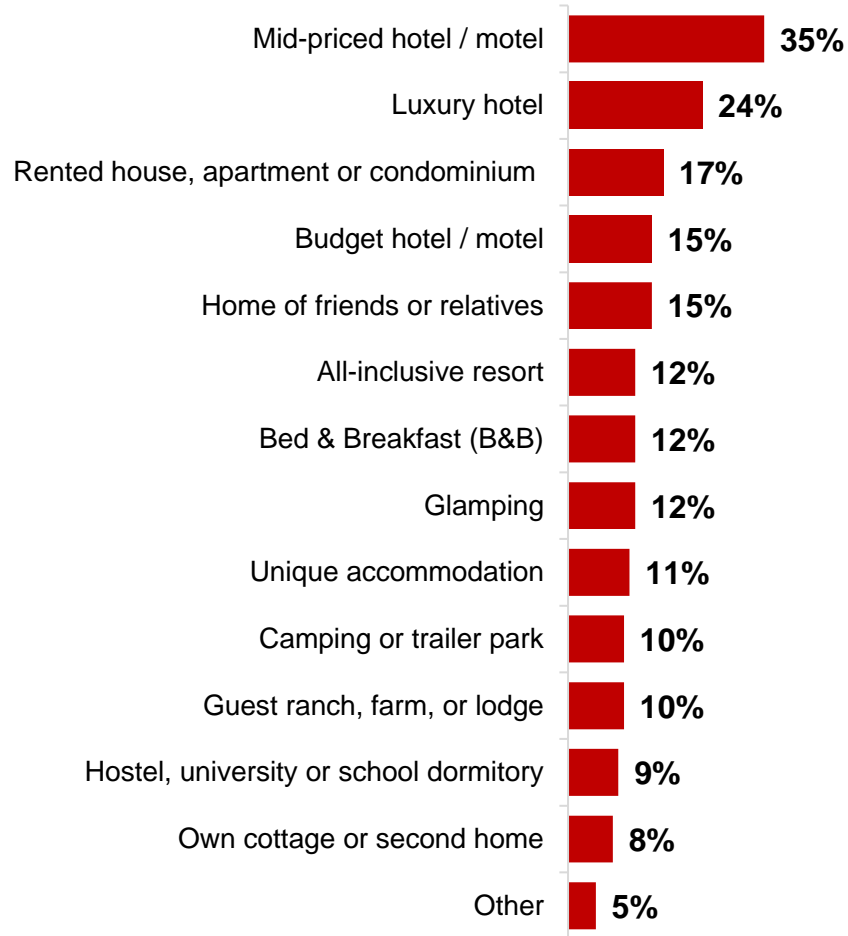


BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

Two in five travellers to Canada booked accommodations with a travel agent/tour operator. This is followed by bookings through online booking engines and directly with accommodation providers.



TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



Travellers to Canada in the past 3 years were most likely to stay in a mid-priced hotel/motel, followed by a luxury hotel.



APPENDIX



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DEFINITION OF REGIONS

*US Locations were shortened in charts, full location info below:

- **Mid-Atlantic** = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
- **Florida & the South** = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia
- **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



THANK YOU

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



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