



Global Tourism Watch

# 2020 Global Tourism Watch

## Total Canada



Canada



# Study Overview: Canada Market



- **Total Canadian Residents:** As a result of the COVID-19 pandemic in 2020 and the renewed focus on domestic travel, the Canada study is conducted among the general population in 2020 (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



2020

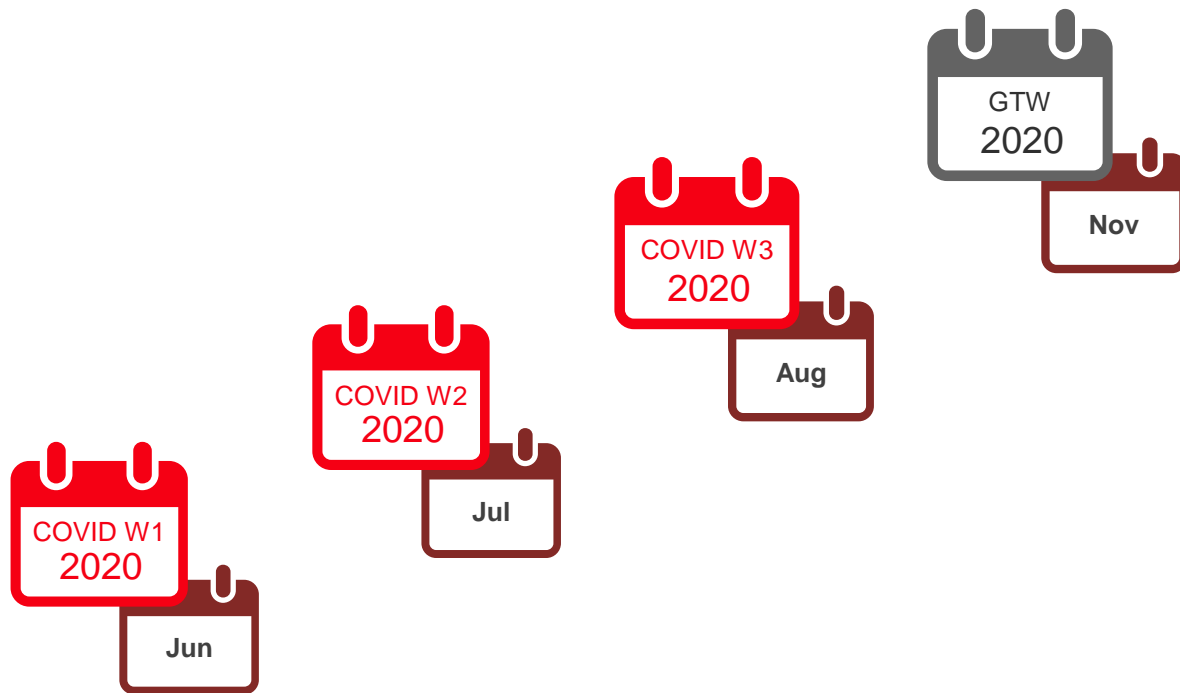
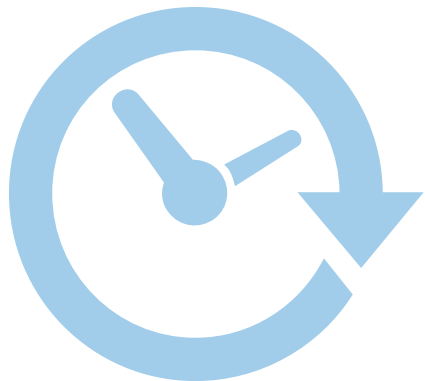


## GTW Sample Distribution

Sample distribution: **National (excl. Territories)**

Total Canadian Residents:	<b>9,059</b>
• Domestic Out-of-Province Travellers:	<b>4,528</b>
• In-Province:	<b>4,531</b>

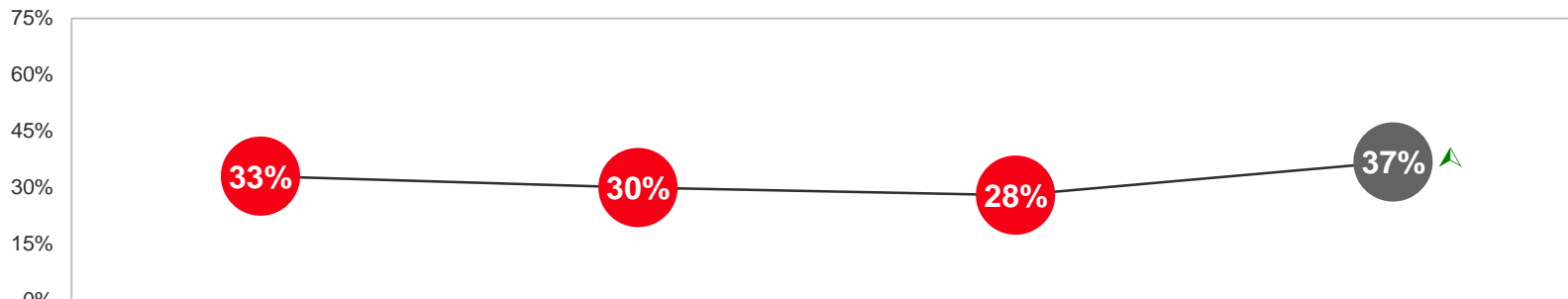
# Historical Field Timings



When interpreting trended results, please caution that field timing may have an effect on comparability of results. On trending slides, waves fielded in summer are denoted in **red** and waves fielded in winter are denoted in **grey**.

# Travel Intensity

## % Taking 3 or More Trips



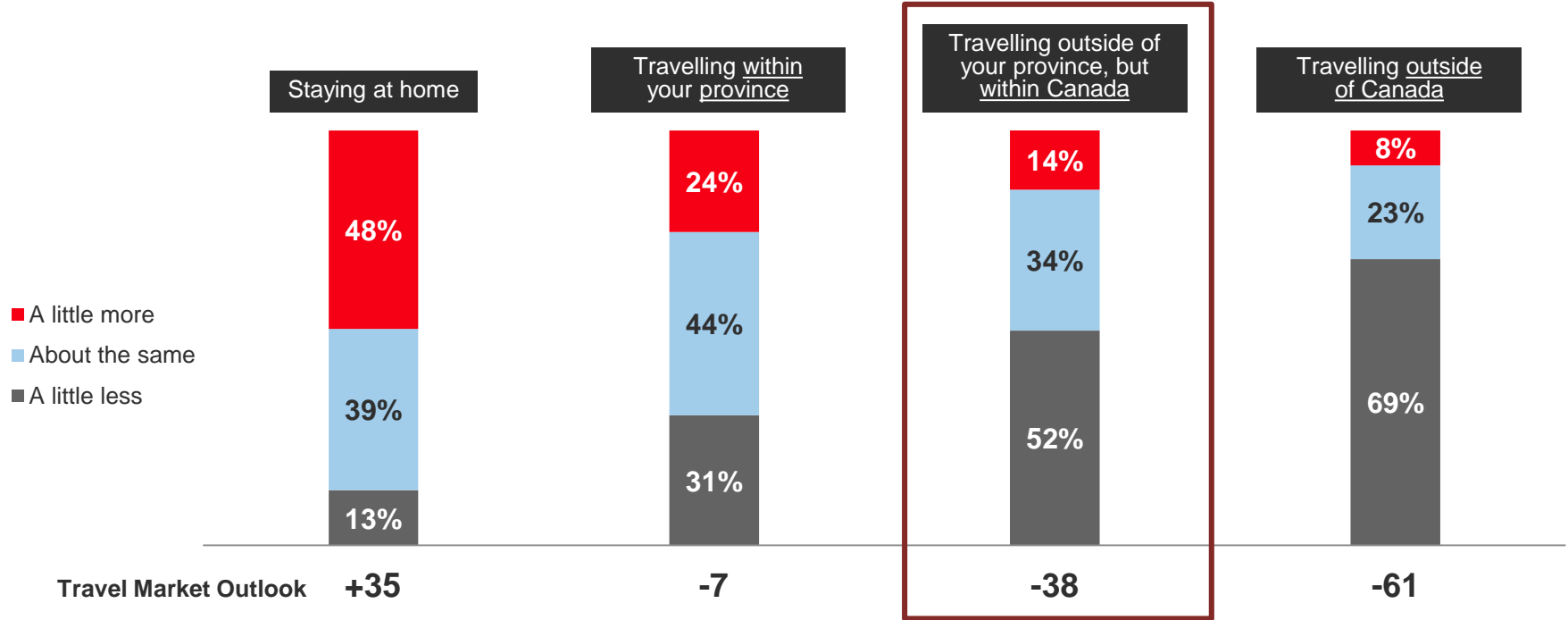
	COVID Tracker June 2020 (n=9050)	COVID Tracker July 2020 (n=9050)	COVID Tracker August 2020 (n=9050)	2020 GTW (Nov) (n=9059)
No trips	<b>44%</b>	<b>46%</b>	<b>47%</b>	<b>41%</b> ▼
1 trip	<b>10%</b>	<b>11%</b>	<b>12%</b>	<b>10%</b>
2 trips	<b>12%</b>	<b>12%</b>	<b>13%</b>	<b>13%</b>
3 to 4 trips	<b>19%</b>	<b>17%</b>	<b>16%</b>	<b>19%</b> ▲
5+ trips	<b>15%</b>	<b>13%</b>	<b>12%</b>	<b>17%</b> ▲

▲ / ▼ Significantly higher / lower than August 2020 wave.

Base: Canadian residents

S4. How many vacation trips have you taken in the past 3 years? Include only trips of 2 or more nights where you spent at least 1 night in paid accommodations.

# Vacation Outlook (Next Year)+



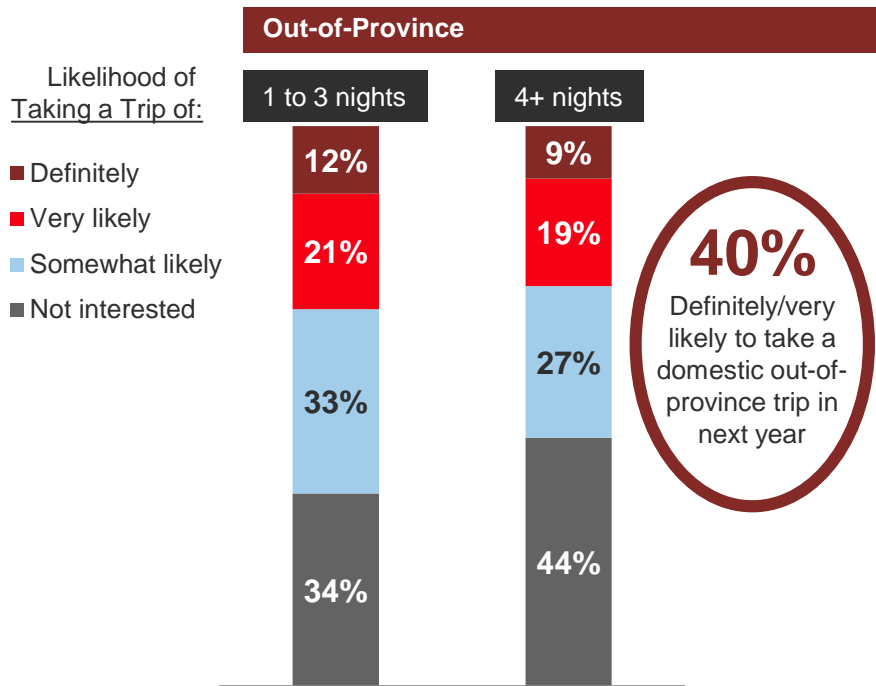
+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

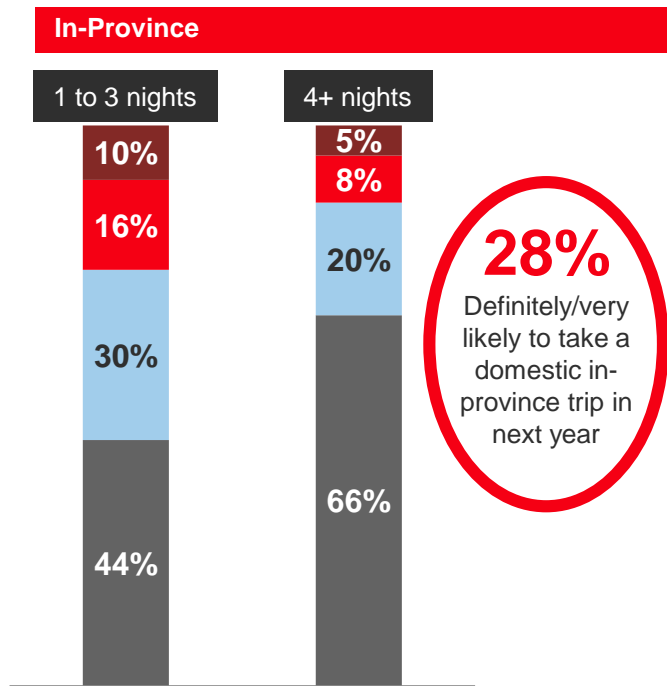
Base: Canadian residents (n=9059)

S2\_CA. 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 ...

# Likelihood of Taking a Domestic Trip (Next Year)+



Base: Domestic out-of-province travellers (n=4528)  
MP6. Realistically, how likely are you to take a vacation trip outside of your own province but within Canada in the next year?

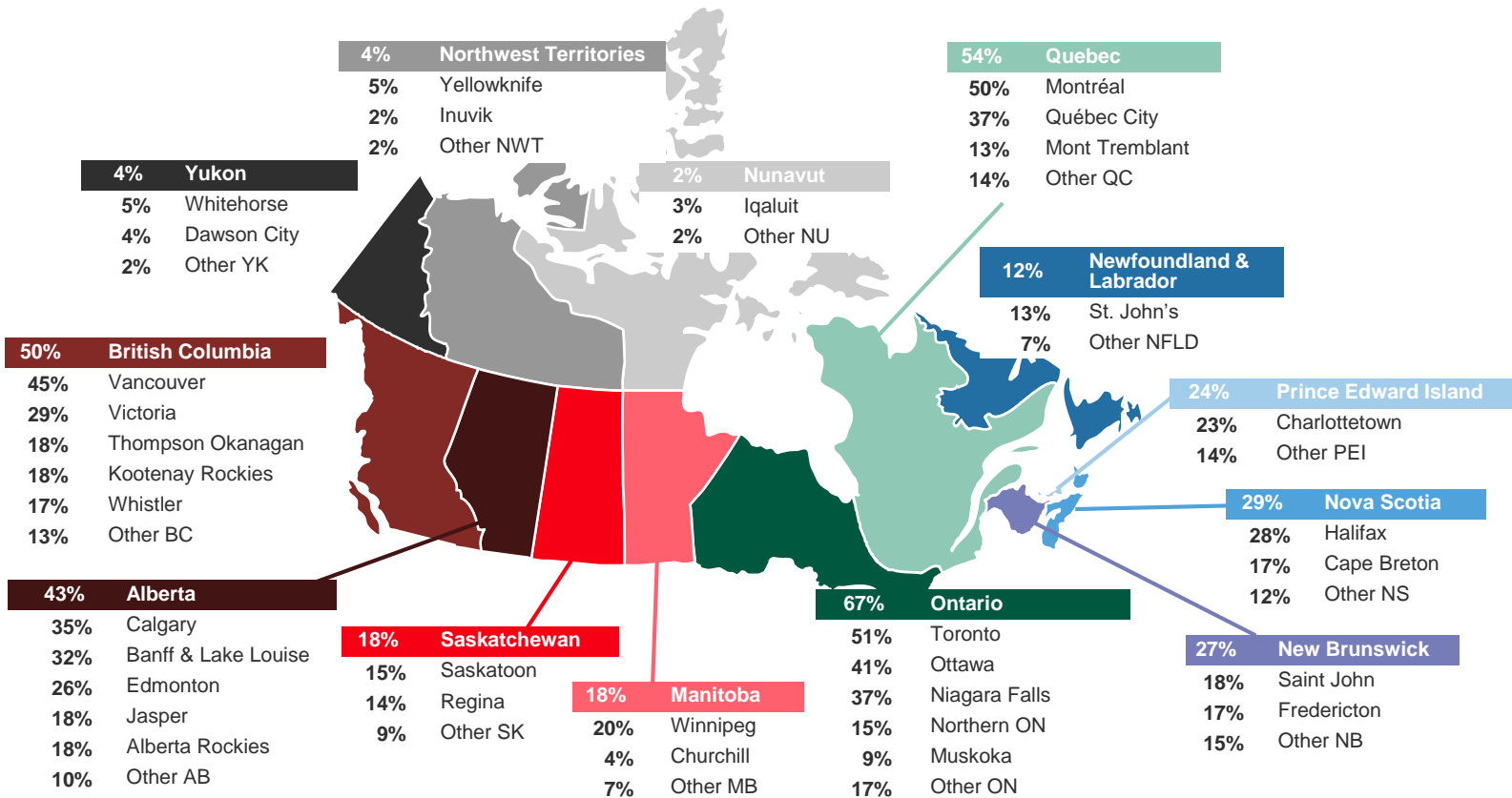


Base: Canadian residents evaluating in-province destinations (n=4531)  
MP6. Realistically, how likely are you to take a vacation trip within your own province in the next year?

+Not asked in the June/July/August waves (COVID tracker) – no trending.  
Note: Data is not comparable to the 2019 GTW due to a change in methodology.  
Note: Not interested is comprised of those saying not very likely, not at all likely, or indicating no intention to travel domestic out-of-province.

# Out-of-Province Destinations Visited

Out-of-Province



▲ / ▼ Significantly higher / lower than August 2020 wave.

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

S10a\_New and S10b\_NEW. Which of the following destinations have you ever visited on a vacation trip which was 2 or more nights long, where you spent at least 1 night in paid accommodation?

# In-Province Destinations Visited

In-Province

## British Columbia (n=750)

- 56% Thompson Okanagan
- 53% Van. Island (no Victoria)
- 50% Victoria
- 49% Van Coast & Mountains
- 44% Metro Vancouver
- 27% Kootenay Rockies
- 19% Cariboo Chilcotin Coast
- 22% Northern BC
- 7% Other BC

## Alberta (n=750)

- 64% ▲ Banff & Lake Louise
- 49% ▲ Alberta Rockies
- 44% Calgary
- 46% Edmonton
- 48% ▲ Jasper
- 16% ▼ Other AB

## Saskatchewan (n=250)

- 46% Saskatoon
- 42% ▲ Moose Jaw
- 40% Regina
- 30% Prince Albert Nat. Park
- 25% ▲ Watrous-Manitou
- 23% Cypress Hills
- 14% ▲ Meadow Lake Prov. Park
- 13% Nipawin-Tobin Lake
- 8% ▼ Other SK

## Manitoba (n=250)

- 40% ▲ Brandon
- 36% Riding Mtn. Nat. Park
- 35% ▲ Whiteshell Prov. Park
- 34% Winnipeg
- 10% Churchill
- 11% ▼ Other MB

## Quebec (n=754)

- 50% Québec City
- 30% Gaspésie
- 34% ▲ Charlevoix
- 29% Montréal
- 30% Eastern Townships
- 31% ▲ Laurentides
- 19% Outaouais
- 14% ▲ Montréalégie
- 10% ▼ Other QC

## Newfoundland & Labrador (n=201)

- 54% Central region
- 54% St. John's/NE Avalon
- 53% Western region
- 38% Eastern region
- 36% Other Avalon Peninsula
- 11% Labrador
- 10% Other NFLD

## Prince Edward Island (n=125)

- 38% Greater Charlottetown
- 24% Green Gables Shores
- 23% Greater Summerside
- 20% North Cape Coastal Dr
- 20% Points East Coastal Dr
- 13% Red Sands Shore
- 7% Other PEI

## Ontario (n=1051)

- 56% Niagara region
- 46% Toronto
- 36% Ottawa
- 35% Muskoka
- 28% South Eastern ON
- 26% Northern ON
- 24% South Western ON
- 3% ▼ Other ON

## New Brunswick (n=200)

- 44% Moncton area
- 36% Fredericton area
- 35% Bay of Fundy
- 34% Saint John area
- 26% Miramichi
- 21% Bathurst/Campbelton
- 21% Acadian Peninsula
- 18% Edmundston
- 4% Other NB

## Nova Scotia (n=200)

- 46% Cape Breton
- 40% Halifax waterfront
- 37% Annapolis Valley
- 34% Lunenburg
- 26% Yarmouth
- 24% Peggy's Cove
- 23% Bay of Fundy
- 17% Pictou
- 10% Other NS

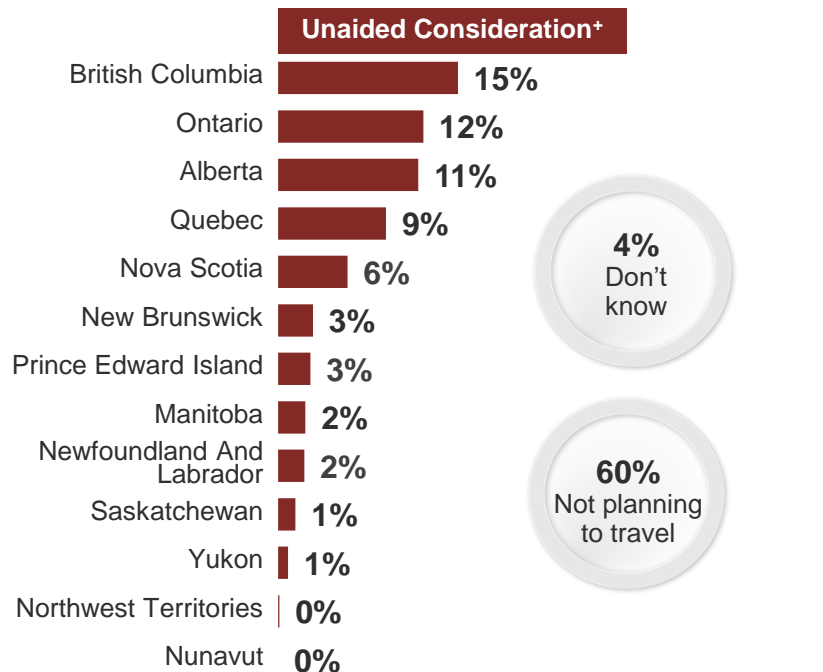
▲ / ▼ Significantly higher / lower than August 2020 wave.

Base: Canadian residents evaluating in-province destinations

S10b\_New\_IP. Which of the following destinations have you ever visited on a vacation trip which was 1 or more nights long, where you spent at least 1 night in paid accommodation? (Select all that apply)

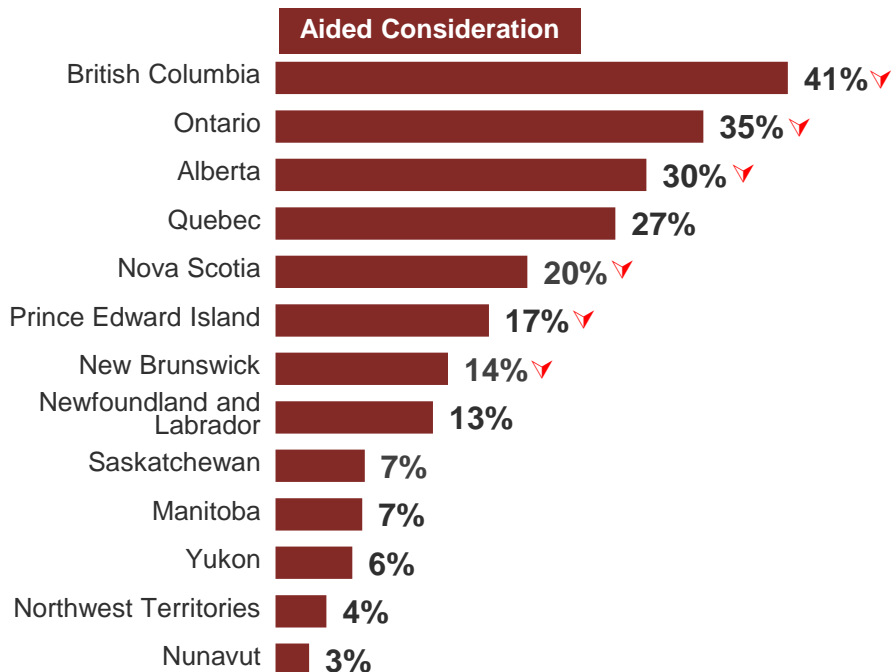


# Unaided and Aided Consideration (Next Year) – Province & Territories



Base: Domestic out-of-province travellers (n= 4528)

S8. 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?



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

BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

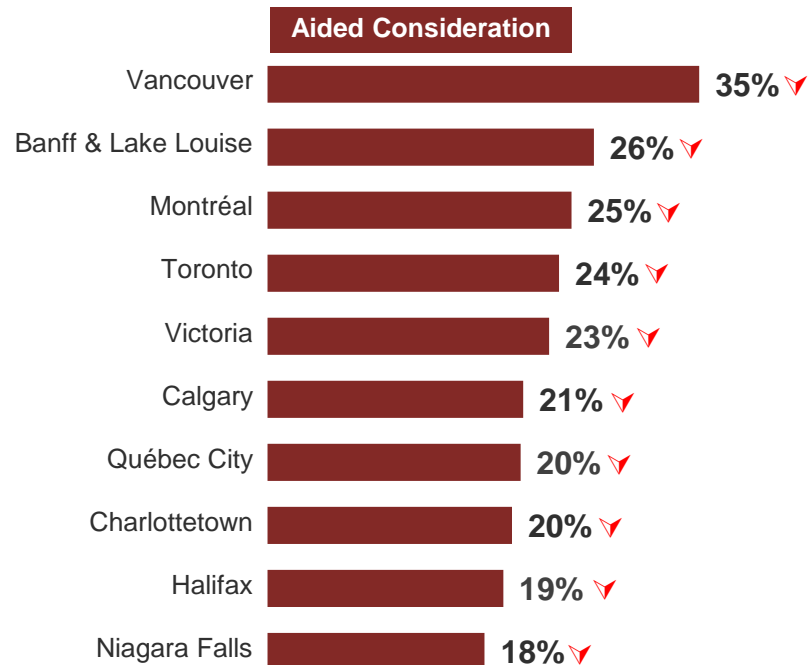
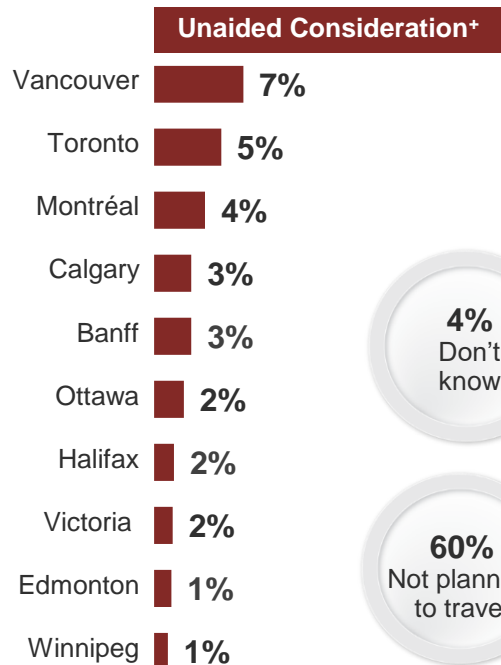
▲ / ▼ Significantly higher / lower than August 2020 wave.

+Answers not coded in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Note: Unaided consideration is based to total sample and does not exclude residents from each province – respondents have the opportunity to type anything unaided and filtering out respondents who mention a destination in their own province would bias the data.

# Unaided and Aided Consideration (Next Year) – Top 10 Cities/Regions



Base: Domestic out-of-province travellers (n= 4528)

S8. 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?

▲ / ▼ Significantly higher / lower than August 2020 wave.

+Answers not coded in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Note: Unaided consideration is based to total sample and does not exclude residents from each province – respondents have the opportunity to type anything unaided and filtering out respondents who mention a destination in their own province would bias the data.

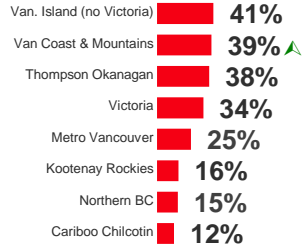
Base: Domestic out-of-province travellers (n=varies)

BVC1b. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

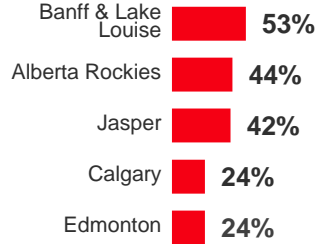
# Aided Consideration (Next Year) – City/Region

In-Province

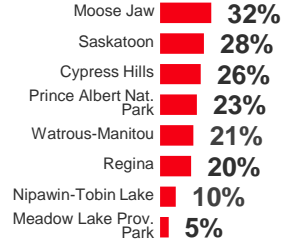
## British Columbia (n=750)



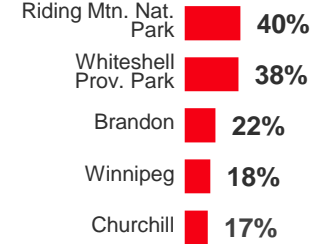
## Alberta (n=750)



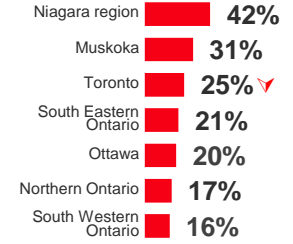
## Saskatchewan (n=250)



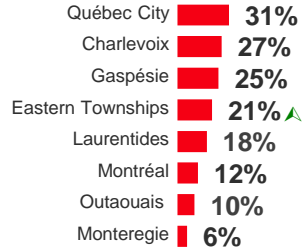
## Manitoba (n=250)



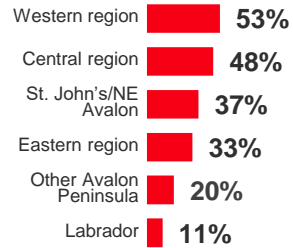
## Ontario (n=1051)



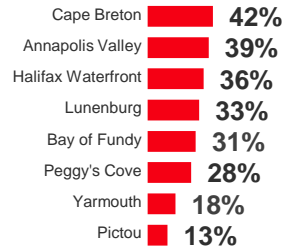
## Quebec (n=754)



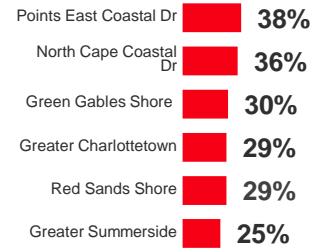
## Newfoundland & Labrador (n=201)



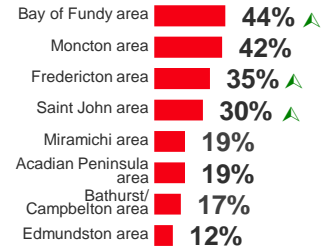
## Nova Scotia (n=200)



## Prince Edward Island (n=125)



## New Brunswick (n=200)



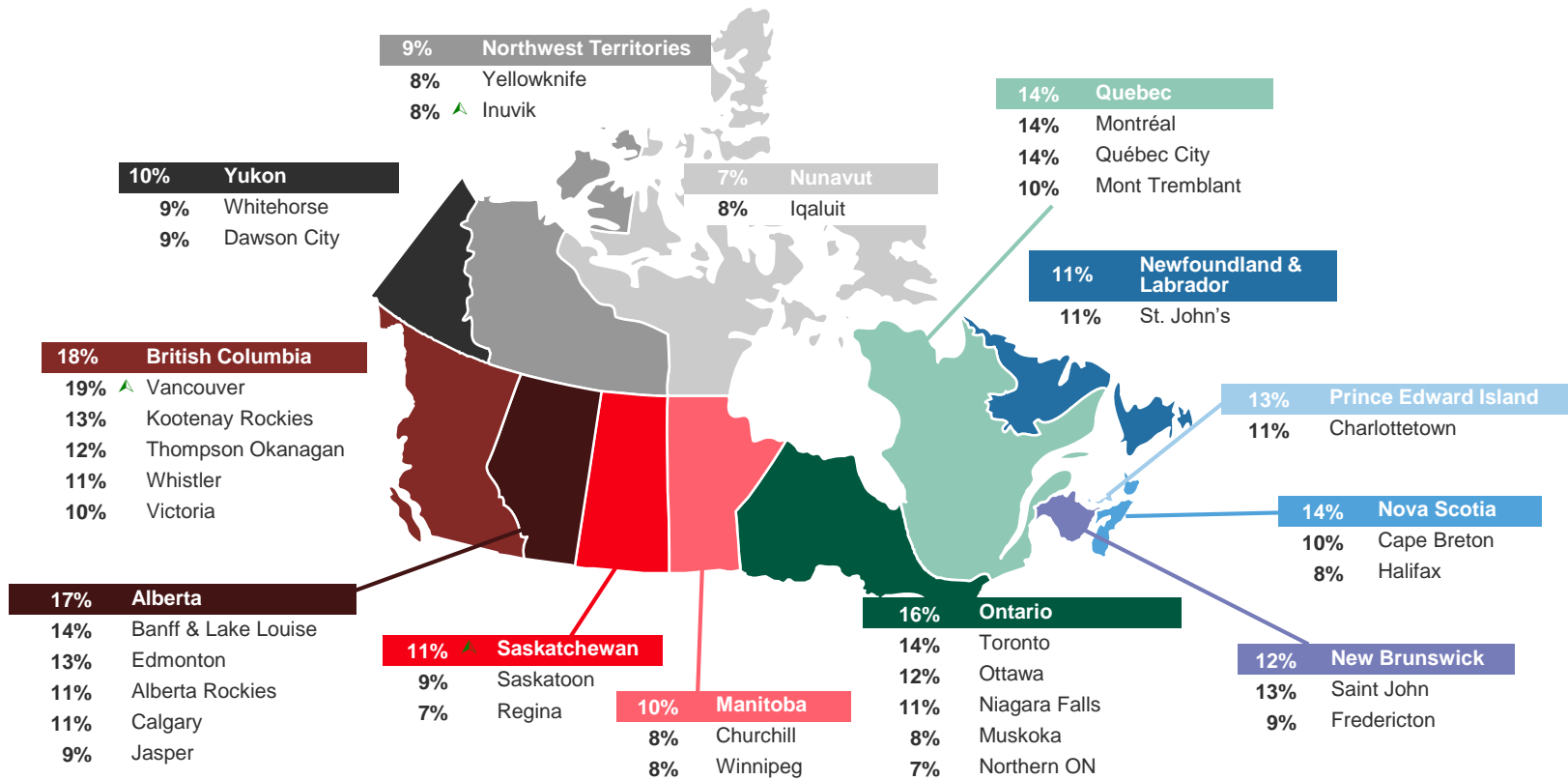
▲ / ▼ Significantly higher / lower than August 2020 wave.

Base: Canadian residents evaluating in-province destinations

BVC1b\_IP You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

# NET Active Planning – by City/Region

Out-of-Province



▲ / ▼ Significantly higher / lower than August 2020 wave.

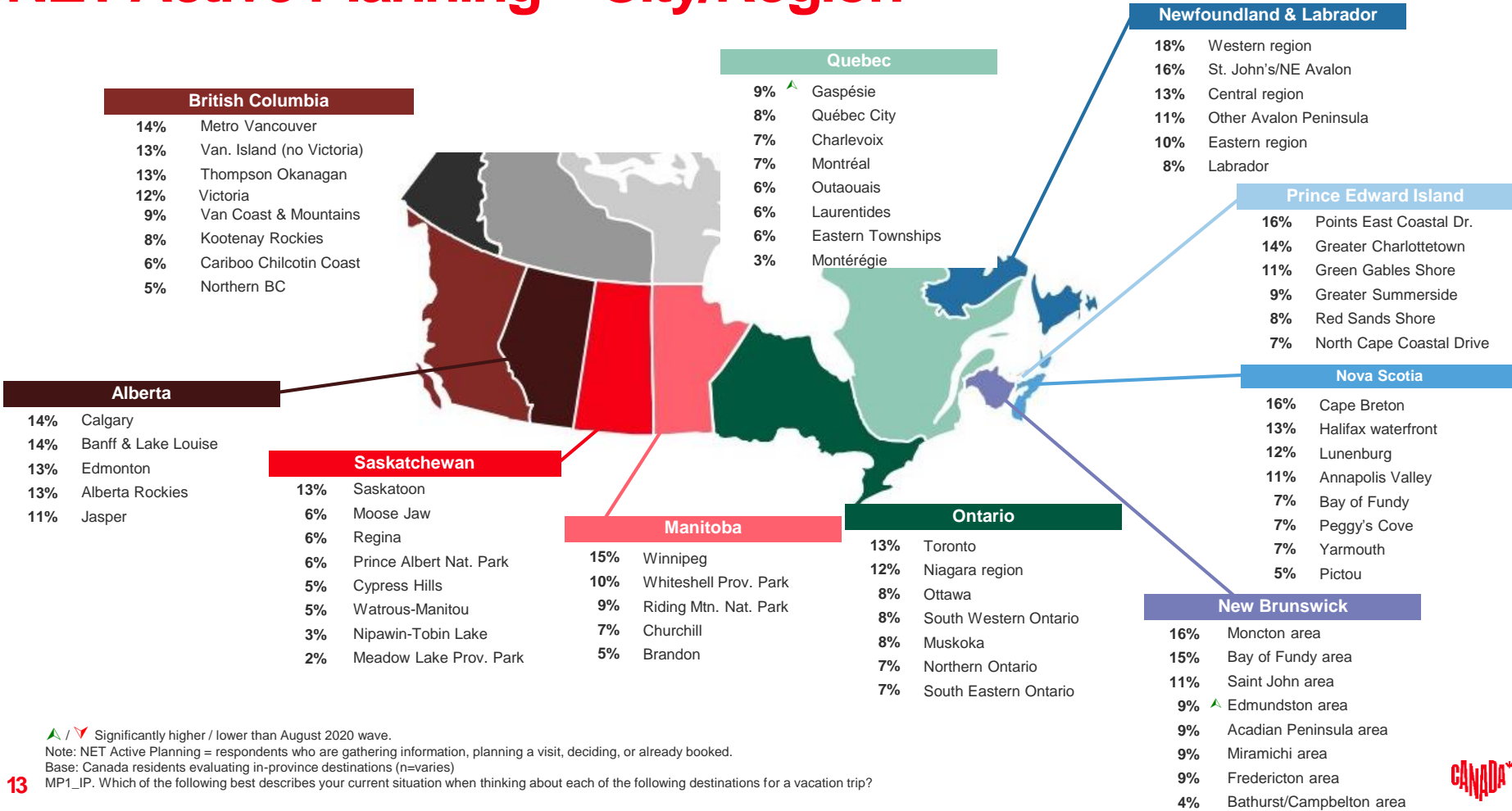
Note: NET Active Planning = respondents who are gathering information, planning a visit, deciding, or already booked.

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

MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

# NET Active Planning – City/Region

In-Province

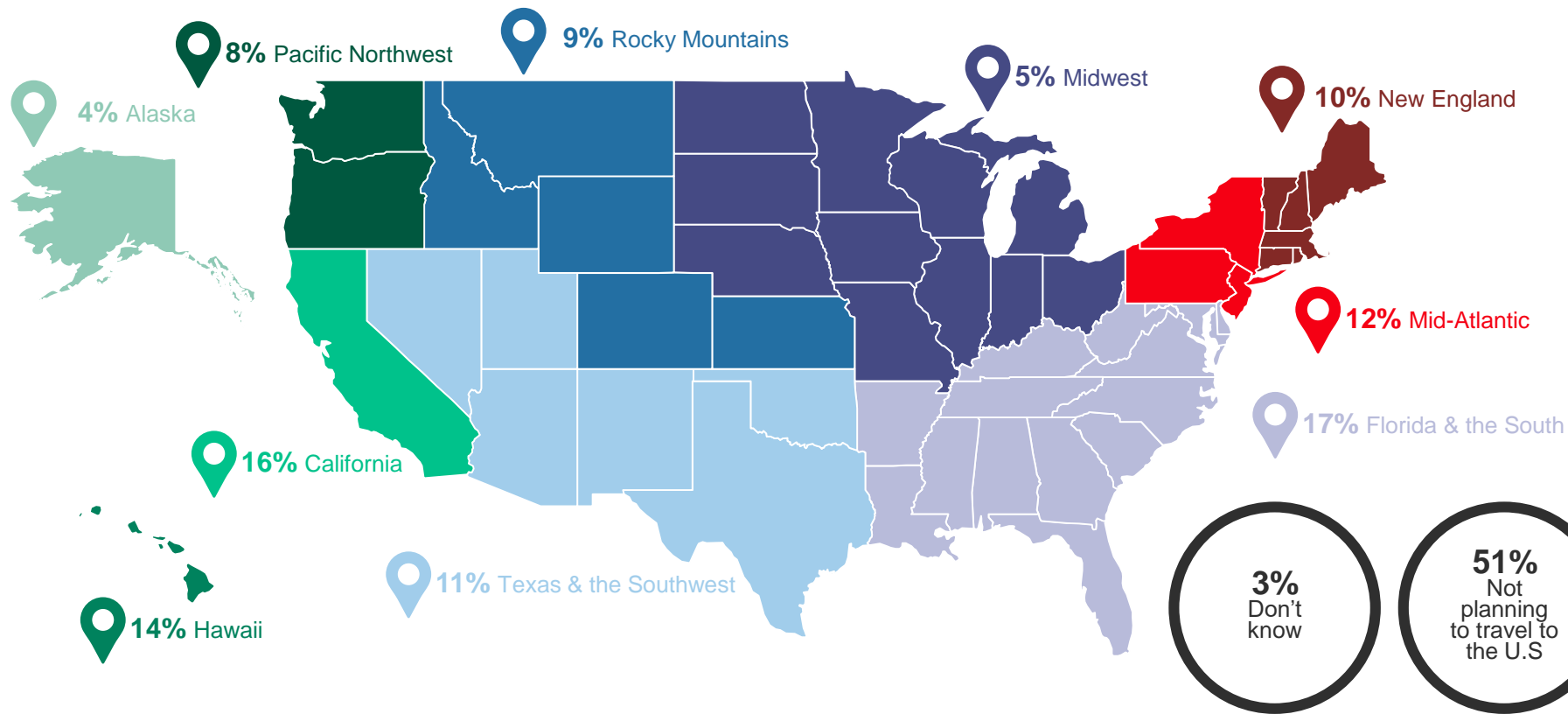


▲ / ▼ Significantly higher / lower than August 2020 wave.  
 Note: NET Active Planning = respondents who are gathering information, planning a visit, deciding, or already booked.  
 Base: Canada residents evaluating in-province destinations (n=varies)  
 MP1\_IP. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?



# U.S. Destination Consideration

Out-of-Province



Base: Domestic out-of-province travellers (n=4528)

MP2. Which regions of the U.S. would you consider visiting in the next year?

# Net Promoter Score (NPS) – by City/Region

Out-of-Province

British Columbia (n=863)	<b>+31</b> ▼
Thompson Okanagan (n=403)	<b>+30</b> ▼
Kootenay Rockies (n=401)	<b>+28</b> ▼
Victoria (n=403)	<b>+27</b> ▼
Whistler (n=399)	<b>+18</b> ▼
Vancouver (n=410)	<b>+13</b>
Alberta (n=861)	<b>-7</b> ▼
Banff & Lake Louise (n=403)	<b>+38</b>
Jasper (n=401)	<b>+35</b>
Alberta Rockies (n=400)	<b>+30</b>
Calgary (n=408)	<b>-19</b> ▼
Edmonton (n=407)	<b>-26</b>
Saskatchewan (n=695)	<b>-49</b>
Saskatoon (n=396)	<b>-45</b>
Regina (n=397)	<b>-62</b> ▼

Manitoba (n=660)	<b>-50</b>
Churchill (n=136)	<b>-13</b>
Winnipeg (n=402)	<b>-53</b> ▼
Ontario (n=881)	<b>-9</b> ▼
Niagara Falls (n=431)	<b>+13</b> ▼
Toronto (n=427)	<b>+2</b> ▼
Muskoka (n=297)	<b>+2</b> ▼
Ottawa (n=425)	<b>-7</b> ▼
Northern Ontario (n=396)	<b>-33</b> ▼
Quebec (n=782)	<b>-6</b> ▼
Montréal (n=405)	<b>+17</b>
Québec City (n=404)	<b>+12</b> ▼
Mont Tremblant (n=311)	<b>+8</b> ▼
New Brunswick (n=743)	<b>-6</b> ▼
Saint John (n=395)	<b>-17</b>
Fredericton (n=399)	<b>-30</b> ▼

Nova Scotia (n=746)	<b>+15</b> ▼
Cape Breton (n=394)	<b>+29</b> ▼
Halifax (n=398)	<b>+16</b> ▼
Prince Edward Island (n=739)	<b>+21</b> ▼
Charlottetown (n=394)	<b>+12</b> ▼
Newfoundland & Labrador (n=500)	<b>+31</b>
St. John's (n=379)	<b>+20</b>
Yukon (n=195)	<b>-1</b> ▼
Whitehorse (n=200)	<b>+2</b> ▼
Dawson City (n=135)	<b>-6</b> ▼
Northwest Territories (n=187)	<b>+7</b>
Yellowknife (n=201)	<b>-2</b>
Inuvik* (n=88)	<b>-28</b>
Nunavut* (n=64)	<b>-7</b> ▲
Iqaluit (n=130)	<b>-19</b> ▲

▲ / ▼ Significantly higher / lower than August 2020 wave.

Note: 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). Asked of past visitors only.

• Small base size (<100), interpret with caution.

• Base: Domestic out-of-province travellers who have visited destination

• MP11. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

# Net Promoter Score (NPS) – City/Region

In-Province

British Columbia	
Vancouver Island (no Victoria) (n=360)	<b>+23</b>
Victoria (n=342)	<b>+14</b> ▼
Vancouver Coast & Mountains (n=335)	<b>+11</b>
Thompson Okanagan (n=380)	<b>+6</b> ▼
Kootenay Rockies (n=170)	<b>-4</b>
Northern BC (n=146)	<b>-5</b> ▼
Metro Vancouver (n=296)	<b>-10</b>
Cariboo Chilcotin (n=114)	<b>-14</b>

Saskatchewan	
Cypress Hills* (n=52)	<b>+29</b>
Watrous-Manitou* (n=57)	<b>+11</b>
Prince Albert Nat. Park* (n=69)	<b>+7</b> ▼
Moose Jaw (n=102)	<b>-17</b>
Meadow Lake Provincial Park (n=31)**	<b>-19</b>
Saskatoon (n=111)	<b>-21</b>
Regina* (n=97)	<b>-48</b>
Nipawin-Tobin Lake^ (n=24)	<b>n/a</b>

Ontario	
Muskoka (n=344)	<b>+14</b>
Niagara Region (n=561)	<b>+11</b> ▼
South Eastern Ontario (n=271)	<b>-8</b>
Northern Ontario (n=262)	<b>-11</b>
Ottawa (n=355)	<b>-15</b>
Toronto (n=473)	<b>-16</b> ▼
South Western Ontario (n=234)	<b>-39</b> ▼

Alberta	
Alberta Rockies (n=368)	<b>+28</b>
Jasper (n=362)	<b>+25</b> ▼
Banff & Lake Louise (n=479)	<b>+26</b>
Calgary (n=328)	<b>-32</b> ▼
Edmonton (n=347)	<b>-52</b> ▼

Manitoba	
Whiteshell Provincial Park* (n=87)	<b>+27</b>
Riding Mountain Provincial Park* (n=88)	<b>+26</b>
Winnipeg* (n=84)	<b>-24</b>
Brandon* (n=99)	<b>-57</b>
Churchill^ (n=25)	<b>n/a</b>

Quebec	
Charlevoix (n=246)	<b>+40</b> ▼
Gaspésie (n=219)	<b>+42</b>
Québec City (n=360)	<b>+28</b>
Eastern Townships (n=214)	<b>+24</b>
Laurentides (n=226)	<b>+9</b> ▼
Outaouais (n=133)	<b>-14</b> ▼
Montréal (n=207)	<b>-24</b>
Monteregie* (n=96)	<b>-26</b>

▲ / ▼ Significantly higher / lower than August 2020 wave.

Note: 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). Asked of past visitors only.

\* Small base size (<100), interpret with caution.

\*\* Very small base size (<50), interpret with extreme caution.

^ Data not available, base too small (<30).

Base: Canadian residents evaluating in-province destinations (n=varies)

MP11. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?





(cont.)



# Net Promoter Score (NPS) – City/Region (cont.)



In-Province

New Brunswick	
Bay of Fundy area* (n=64)	<b>+42</b>
Acadian Peninsula** (n=37)	<b>+13</b>
Moncton area* (n=85)	<b>-6</b>
Saint John area* (n=59)	<b>-10</b>
Fredericton area* (n=67)	<b>-15</b>
Miramichi area** (n=47)	<b>-23</b>
Bathurst/Campbelton area** (n=38)	<b>-27</b>
Edmundston area** (n=32)	<b>-38</b>

Nova Scotia	
Cape Breton* (n=86)	<b>+49</b>
Bay of Fundy* (n=42)	<b>+42</b>
Annapolis Valley* (n=66)	<b>+42</b>
Peggy's Cove* (n=42)	<b>+20</b> 
Halifax Waterfront* (n=73)	<b>+16</b> 
Lunenburg* (n=60)	<b>+12</b> 
Yarmouth* (n=47)	<b>-32</b> 
Pictou^ (n=28)	<b>n/a</b>

Prince Edward Island	
Points East Coastal Drive* (n=)	<b>+36</b>
Green Gables Shore* (n=31)	<b>+30</b>
Greater Charlottetown* (n=48)	<b>+17</b> 
Greater Summerside^ (n=27)	<b>n/a</b>
Points East Coastal Drive^ (n=25)	<b>n/a</b>
North Cape Coastal Drive^ (n=23)	<b>n/a</b>
Red Sands Shore^ (n=16)	<b>n/a</b>

Newfoundland & Labrador	
Labrador* (n=)	<b>+44</b>
Western Region (n=105)	<b>+38</b>
Eastern Region* (n=74)	<b>+26</b>
Central Region (n=106)	<b>+22</b>
Other Avalon Peninsula* (n=72)	<b>+9</b>
St. Johns/Northeast Avalon (n=107)	<b>+8</b>
Labrador^ (n=20)	<b>n/a</b>

 /  Significantly higher / lower than August 2020 wave.  
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Base: Canadian residents evaluating in-province destinations (n=varies)

MP11. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

# Characteristics+

Out-of-Province

	BC (n=694)	AB (n=700)	SK (n=698)	MB (n=692)	ON (n=696)	QC (n=696)	NB (n=696)	NS (n=699)	PEI (n=697)	NL (n=695)	YK (n=699)	NWT (n=696)	NU (n=698)
Beautiful	79%	60%	33%	34%	49%	58%	58%	66%	68%	66%	61%	61%	55%
Nice	69%	53%	38%	35%	55%	45%	64%	65%	64%	59%	47%	48%	40%
Spacious	63%	56%	47%	43%	44%	29%	41%	39%	35%	53%	59%	65%	54%
Open-minded	59%	37%	24%	25%	42%	25%	41%	46%	40%	40%	34%	34%	29%
Authentic	53%	42%	36%	36%	36%	48%	54%	55%	57%	59%	57%	57%	58%
Inclusive	49%	33%	22%	25%	42%	26%	39%	41%	36%	37%	30%	34%	27%
Down-to-earth	39%	38%	41%	37%	28%	23%	51%	54%	53%	59%	47%	45%	40%
Ordinary	13%	23%	35%	38%	27%	15%	23%	12%	14%	14%	9%	10%	9%
Arrogant	13%	17%	5%	9%	26%	45%	6%	6%	5%	5%	5%	4%	4%
Stressful	11%	11%	8%	12%	26%	27%	5%	6%	5%	6%	8%	6%	8%

+Not asked in the June/July/August waves (COVID tracker) – no trending.

Base: Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination PC1\_NEW1. Which destinations, if any, do you associate the following characteristics?

# Characteristics – Relative Strengths & Weaknesses+

	BC (n=694)	AB (n=700)	SK (n=698)	MB (n=692)	ON (n=696)	QC (n=696)	NB (n=696)	NS (n=699)	PEI (n=697)	NL (n=695)	YK (n=699)	NWT (n=696)	NU (n=698)
Beautiful			■	■									
Nice													
Spacious						■		■	■		■	■	■
Open-minded	■					■							
Authentic					■								■
Inclusive													
Down-to-earth	■				■	■				■			
Ordinary	■		■	■	■			■			■	■	■
Arrogant					■	■	■	■	■	■	■	■	■
Stressful					■	■	■	■	■	■			

■ Shows significant (90% confidence level) strength ■ Shows significant (90% confidence level) weakness/opportunity

Relative Brand Strength is a technique that normalizes data across competitive destinations and eliminates “bigger destination effect” (bigger destinations generally tend to be associated more with every attribute) and “category attribute effect” (some attributes tend to be more associated with every destination).

+Not asked in the June/July/August waves (COVID tracker) – no trending.

Base: Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination  
PC1\_NEW1. Which destinations, if any, do you associate the following characteristics?

		BC (n=694)	AB (n=700)	SK (n=698)	MB (n=691)	ON (n=696)	QC (n=696)	NB (n=696)	NS (n=699)	PEI (n=696)	NL (n=695)	YK (n=698)	NWT (n=696)	NU (n=696)
Higher Order Motivations	Allows me to de-stress	58%	43%	26%	22%	37%	32%	42%	51%	55%	50%	37%	36%	27%
	Spend quality time with friends and/or family	64%	46%	27%	23%	57%	44%	47%	50%	51%	46%	28%	29%	19%
	Offers adventures that everyone can enjoy	72%	52%	26%	26%	56%	48%	44%	53%	55%	52%	41%	40%	31%
	Place to form lifelong memories	66%	48%	22%	24%	50%	50%	44%	50%	54%	53%	48%	46%	40%
	Place that inspires me	59%	35%	14%	13%	31%	37%	29%	43%	41%	42%	33%	31%	26%
	Proud to tell people I have visited	70%	49%	27%	23%	45%	52%	45%	54%	56%	57%	49%	52%	46%
Adventures that challenge me	57%	42%	18%	18%	39%	32%	31%	35%	33%	44%	50%	47%	39%	
Cities	Great shopping	51%	37%	10%	15%	61%	51%	22%	25%	20%	15%	9%	9%	7%
	A lot of things to see and do	77%	56%	19%	22%	69%	63%	46%	55%	49%	47%	33%	32%	25%
	Great for exploring and soaking in the atmosphere	66%	47%	22%	22%	41%	51%	46%	55%	55%	55%	46%	47%	38%
Tours/Journeys	Combines both outdoor activities and city experiences	70%	51%	22%	23%	54%	52%	37%	46%	38%	38%	25%	22%	15%
	Touring around to multiple destinations	74%	52%	20%	22%	66%	54%	46%	54%	50%	45%	28%	27%	18%
Outdoor	Outdoor activities I would participate in	65%	50%	22%	24%	43%	38%	39%	49%	47%	47%	44%	45%	34%
	Beautiful outdoor scenery and landscapes	78%	59%	28%	31%	47%	50%	54%	61%	64%	65%	60%	61%	53%
	Great place to see wildlife in its natural habitat	63%	56%	29%	33%	28%	25%	34%	39%	34%	55%	67%	66%	58%
Food	Dining and food experiences I would enjoy	63%	42%	21%	20%	54%	62%	43%	51%	46%	42%	25%	25%	18%
	Diverse dining/food experiences	62%	36%	19%	22%	50%	63%	38%	46%	41%	42%	32%	29%	29%
Culture	Great historical/cultural experiences	57%	39%	26%	29%	54%	67%	48%	56%	53%	55%	45%	45%	42%
	Unique culture I want to experience	40%	27%	19%	17%	25%	53%	38%	44%	42%	51%	50%	48%	52%
	Vibrant arts scene	50%	27%	14%	15%	46%	57%	22%	30%	23%	26%	17%	15%	17%
	Appealing festivals and events	52%	39%	15%	19%	54%	60%	33%	39%	35%	31%	22%	18%	15%
General	Good value for money	30%	34%	26%	24%	37%	31%	41%	42%	46%	36%	19%	22%	14%
	Authentic Canadian experiences	67%	53%	39%	35%	51%	56%	56%	62%	60%	61%	52%	59%	51%
	People are friendly and welcoming	56%	51%	40%	38%	44%	31%	61%	64%	65%	60%	45%	47%	42%
	Experience things I can't experience at home	61%	45%	26%	28%	36%	47%	45%	51%	50%	56%	57%	60%	54%

+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination

MP5\_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement.

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

# Brand Attributes – Relative Strengths & Weaknesses+

Out-of-Province

		BC (n=694)	AB (n=700)	SK (n=698)	MB (n=691)	ON (n=696)	QC (n=696)	NB (n=696)	NS (n=699)	PEI (n=696)	NL (n=695)	YK (n=698)	NWT (n=696)	NU (n=696)
Higher Order Motivations	Allows me to de-stress						■			■				
	Spend quality time with friends and/or family					■						■		■
	Offers adventures that everyone can enjoy													
	Place to form lifelong memories													
	Place that inspires me													
	Proud to tell people I have visited													
	Adventures that challenge me							■					■	■
Cities	Great shopping	■	■			■	■			■	■	■	■	■
	A lot of things to see and do					■								■
	Great for exploring and soaking in the atmosphere					■								
Tours/Journey &	Combines both outdoor activities and city experiences	■	■			■						■	■	■
	Touring around to multiple destinations					■						■	■	■
Outdoor	Outdoor activities I would participate in													
	Beautiful outdoor scenery and landscapes					■	■							
	Great place to see wildlife in its natural habitat					■	■	■	■	■		■	■	■
Food	Dining and food experiences I would enjoy						■					■	■	■
	Diverse dining/food experiences						■							
Culture	Great historical/cultural experiences		■				■							
	Unique culture I want to experience	■	■			■						■	■	■
	Vibrant arts scene					■	■					■	■	
	Appealing festivals and events					■	■					■	■	■
General	Good value for money	■		■	■					■		■		■
	Authentic Canadian experiences			■										
	People are friendly and welcoming	■		■	■	■	■	■						
	Experience things I can't experience at home					■	■	■				■	■	■

■ Shows significant (90% confidence level) strength ■ Shows significant (90% confidence level) weakness/opportunity

Relative Brand Strength is a technique that normalizes data across competitive destinations and eliminates "bigger destination effect" (bigger destinations generally tend to be associated more with every attribute) and "category attribute effect" (some attributes tend to be more associated with every destination).

+Not asked in the June/July/August waves (COVID tracker) – no trending.

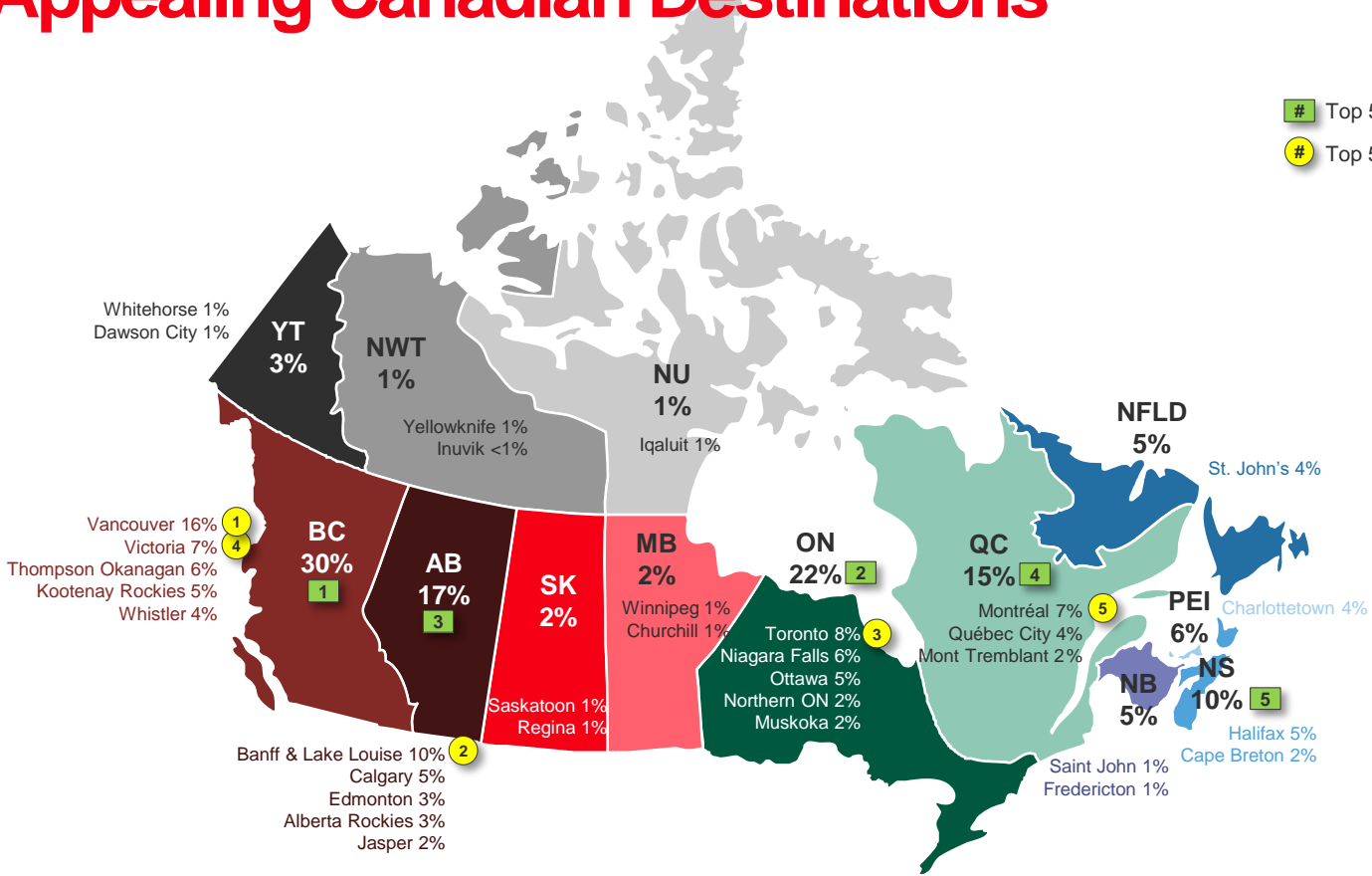
Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination

MP5\_NEW. 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.

# Most Appealing Canadian Destinations+

Out-of-Province



+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

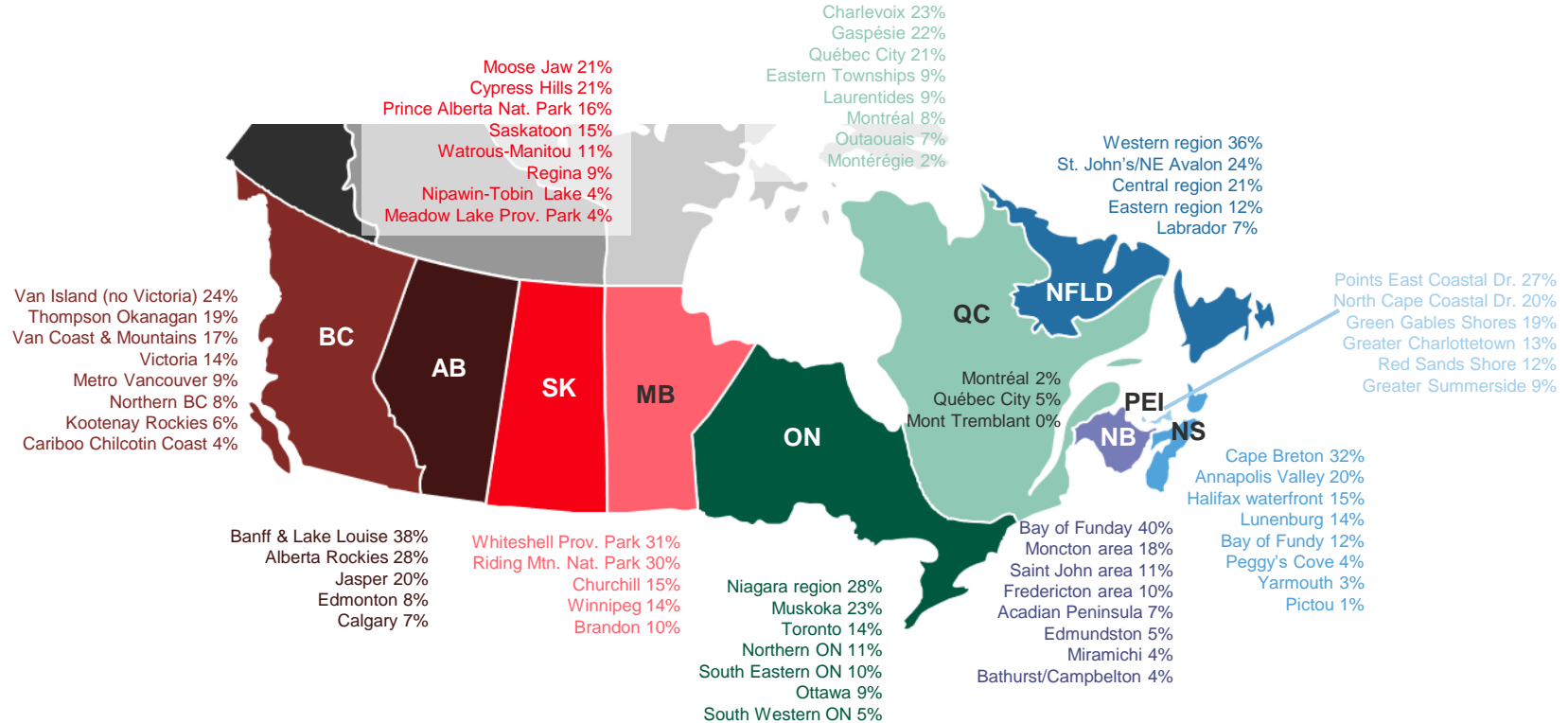
Base: Domestic out-of-province travellers considering out-of-province travel to a Canadian province or territory in the next year, excluding residents from each province (n=varies)

MP8a. Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you?

MP8b. Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you?

# Most Appealing Canadian Destinations+

In-Province



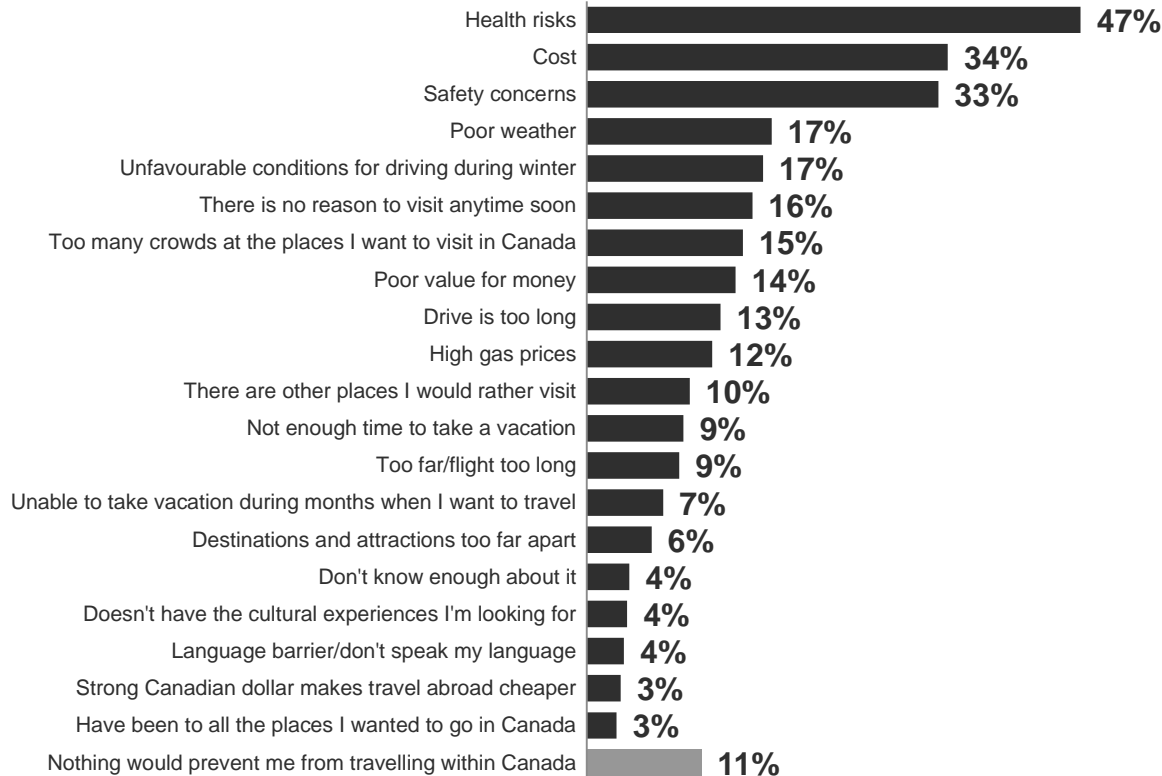
+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Canadian residents evaluating in-province destinations and considering travel to a Canadian city or region within their province of residence in the next year (n=varies)

MP8b. Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you?

# Perceived Barriers to Travelling within Canada<sup>+</sup>



<sup>+</sup>Not asked in the June/July/August waves (COVID tracker) – no trending.

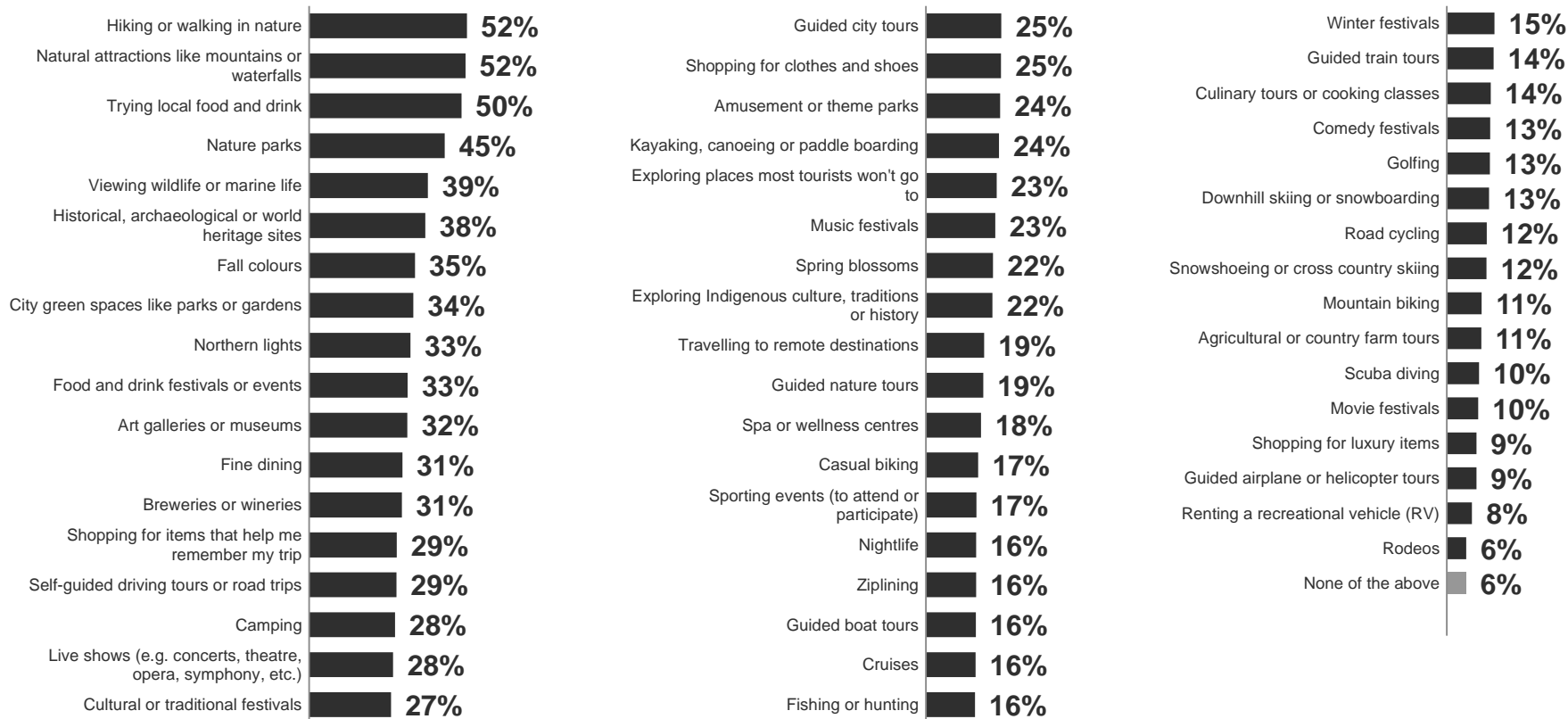
Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Canadian residents (n=9059)

MP9. Which of the following factors might discourage you from travelling within Canada?



# Activities Interested in While on Vacation+



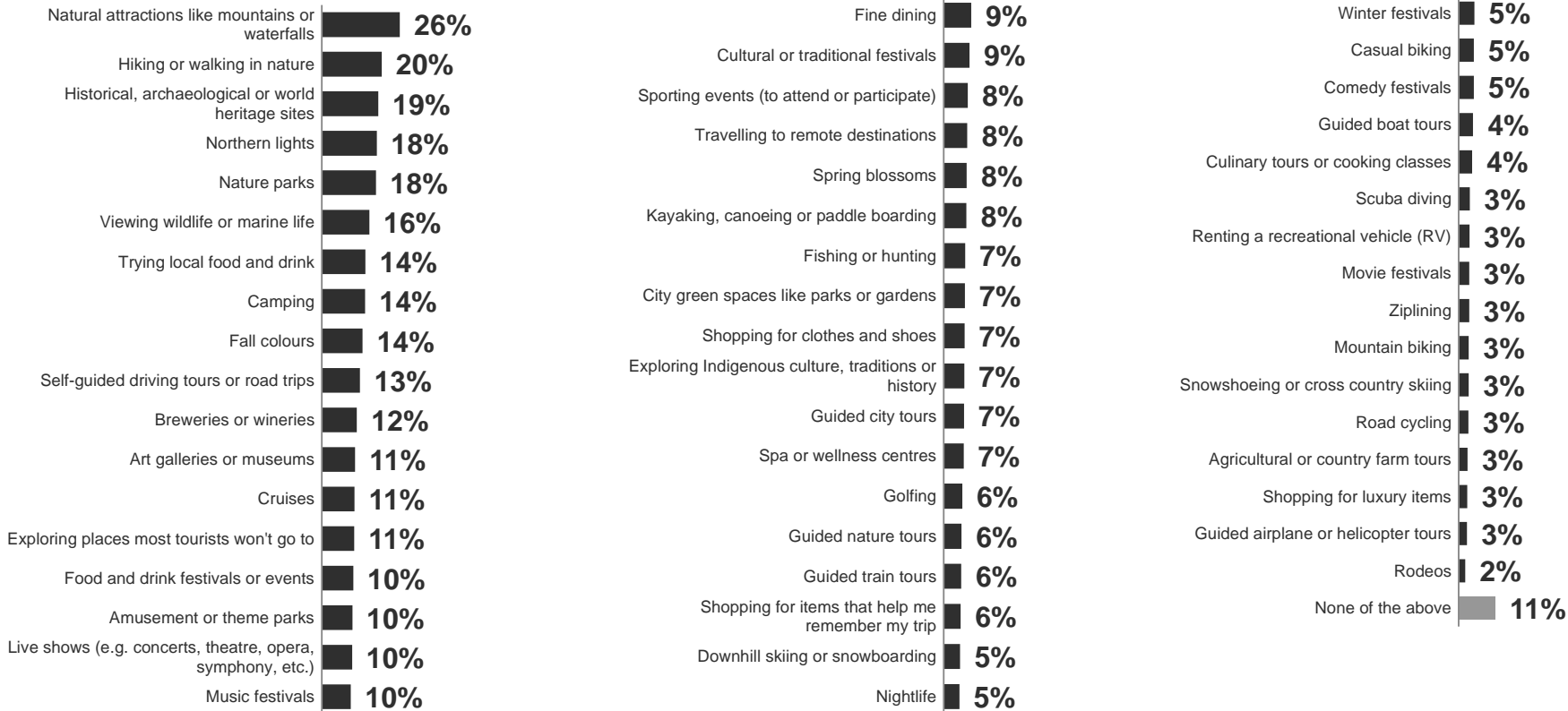
+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Canadian residents (n=9059)

MP10. In general, what activities or places are you interested in while on vacation?

# Activities to Base an Entire Trip Around+



+Not asked in the June/July/August waves (COVID tracker) – no trending.

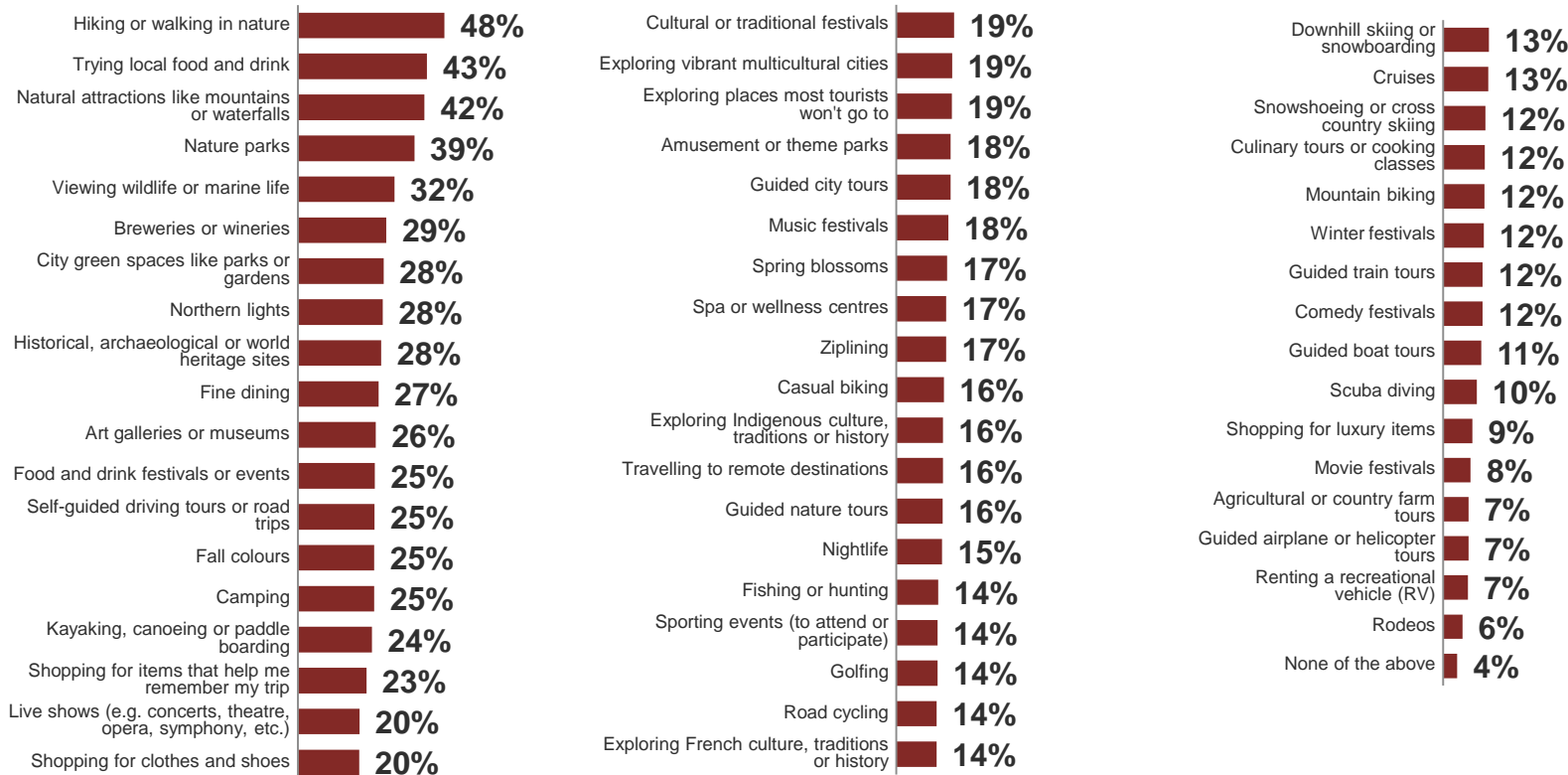
Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Canadian residents answering (n=8529)

MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity?

# Activities Interested in within Canada+

Out-of-Province



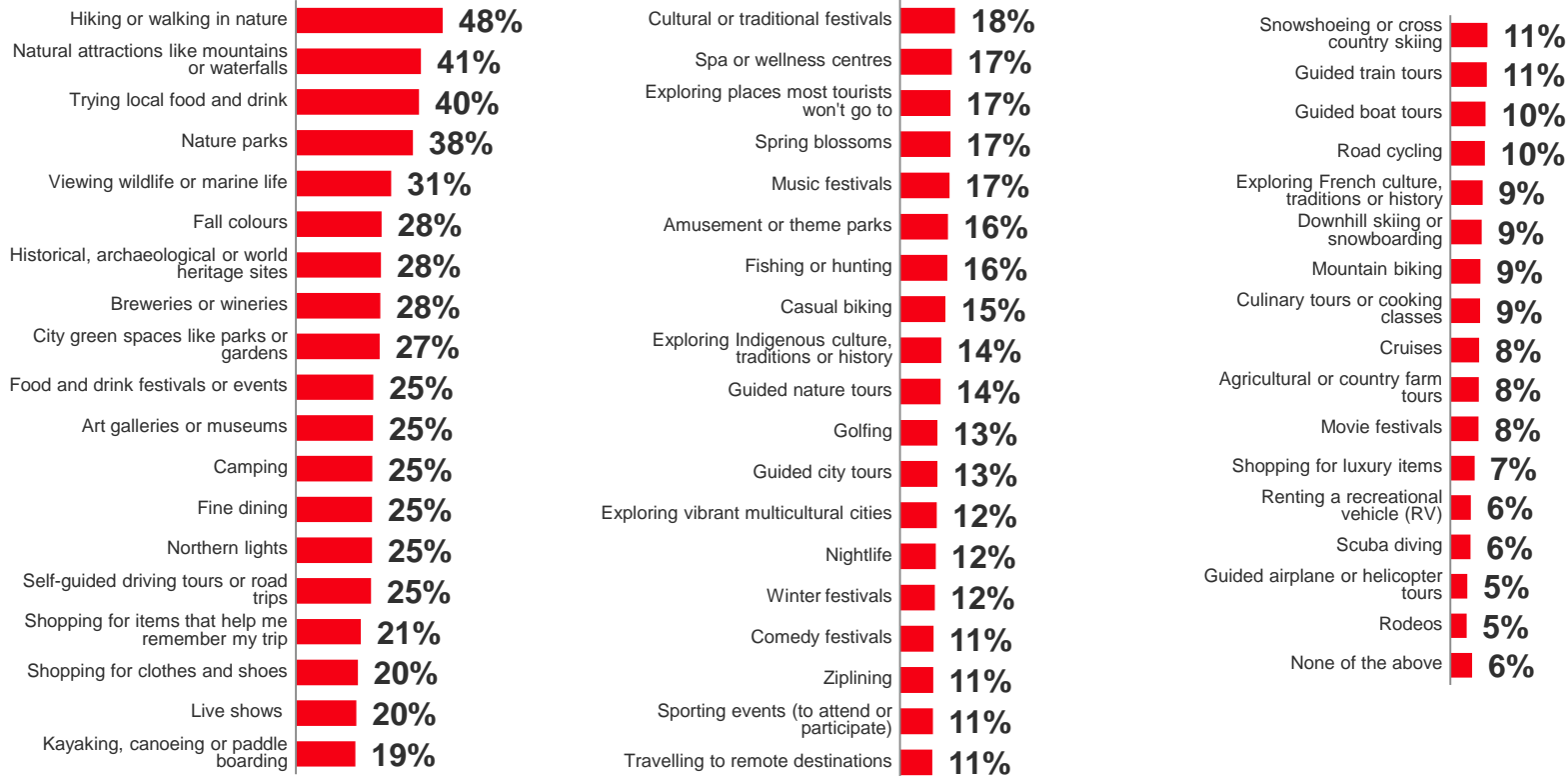
+ New question added in 2020 GTW (November) – no trending.

Base: Domestic out-of-province travellers (n=3830)

FT11. Thinking of your next trip to a destination outside your province, what activities would you be interested in participating in?

# Activities Interested in within Province+

In-Province



+ New question added in 2020 GTW (November) – no trending.

Base: Canadian residents evaluating in-province destinations (n=3430)

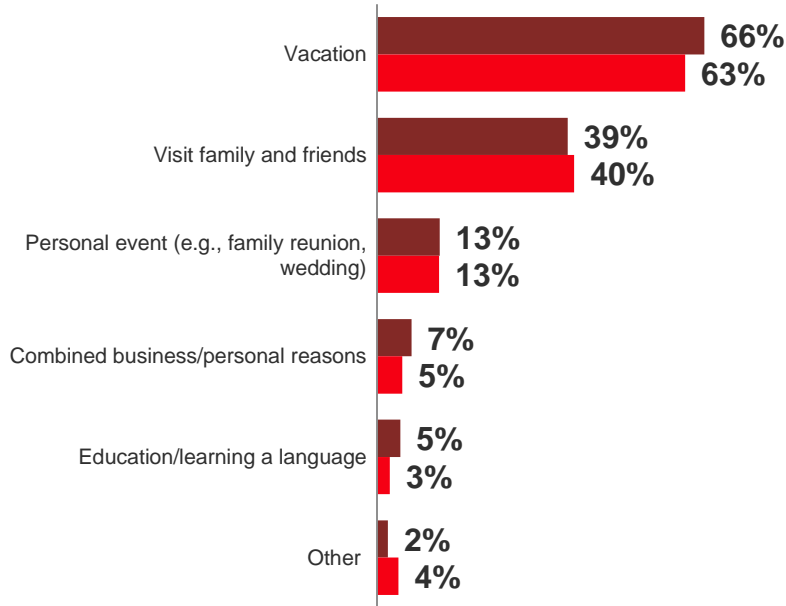
FT11. Thinking of your next trip to a destination within your province, what activities would you be interested in participating in?

# Main Purpose and Travel Party of Next Trip

Out-of-Province

In-Province

## Purpose of Next Trip\*

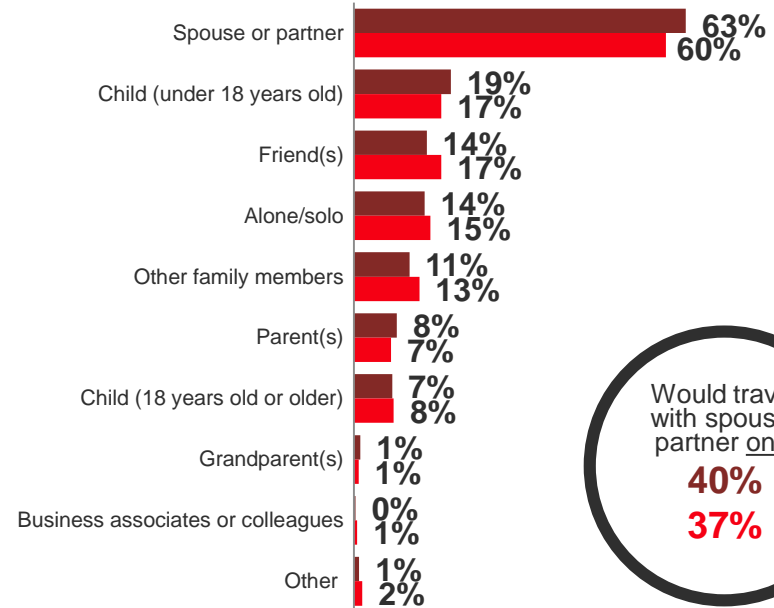


Base: Domestic out-of-province travellers (n=3830)

Base: Canadian residents evaluating in-province destinations (n=3430)

FT2. Thinking of your next trip to [a destination outside of your province / a destination within your province], what would be the main purpose of this trip?

## Travel Party Next Trip\*



Base: Domestic out-of-province travellers (n=3830)

Base: Canadian residents evaluating in-province destinations (n=3430)

FT5. Thinking of your next trip to [a destination outside of your province / a destination within your province], who would you travel with?

Would travel with spouse/  
partner only

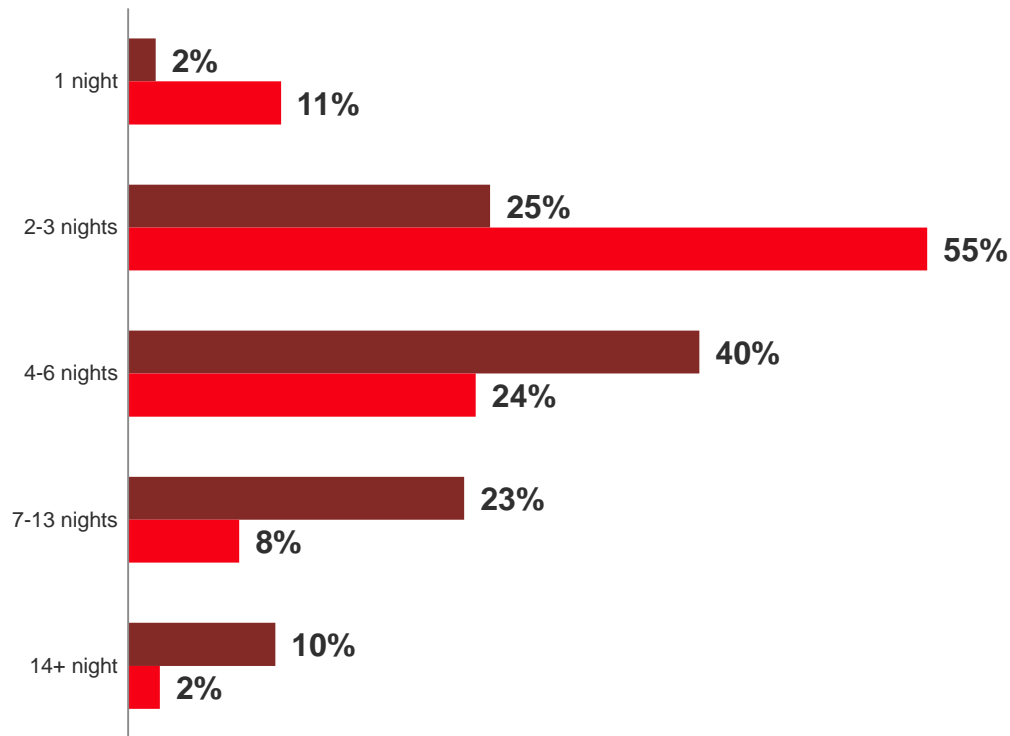
40%

37%

# Number of Nights for Next Trip<sup>+</sup>

Out-of-Province

In-Province



<sup>+</sup> New question added in 2020 GTW (November) – no trending.

Base: Domestic out-of-province travellers (n=3830)

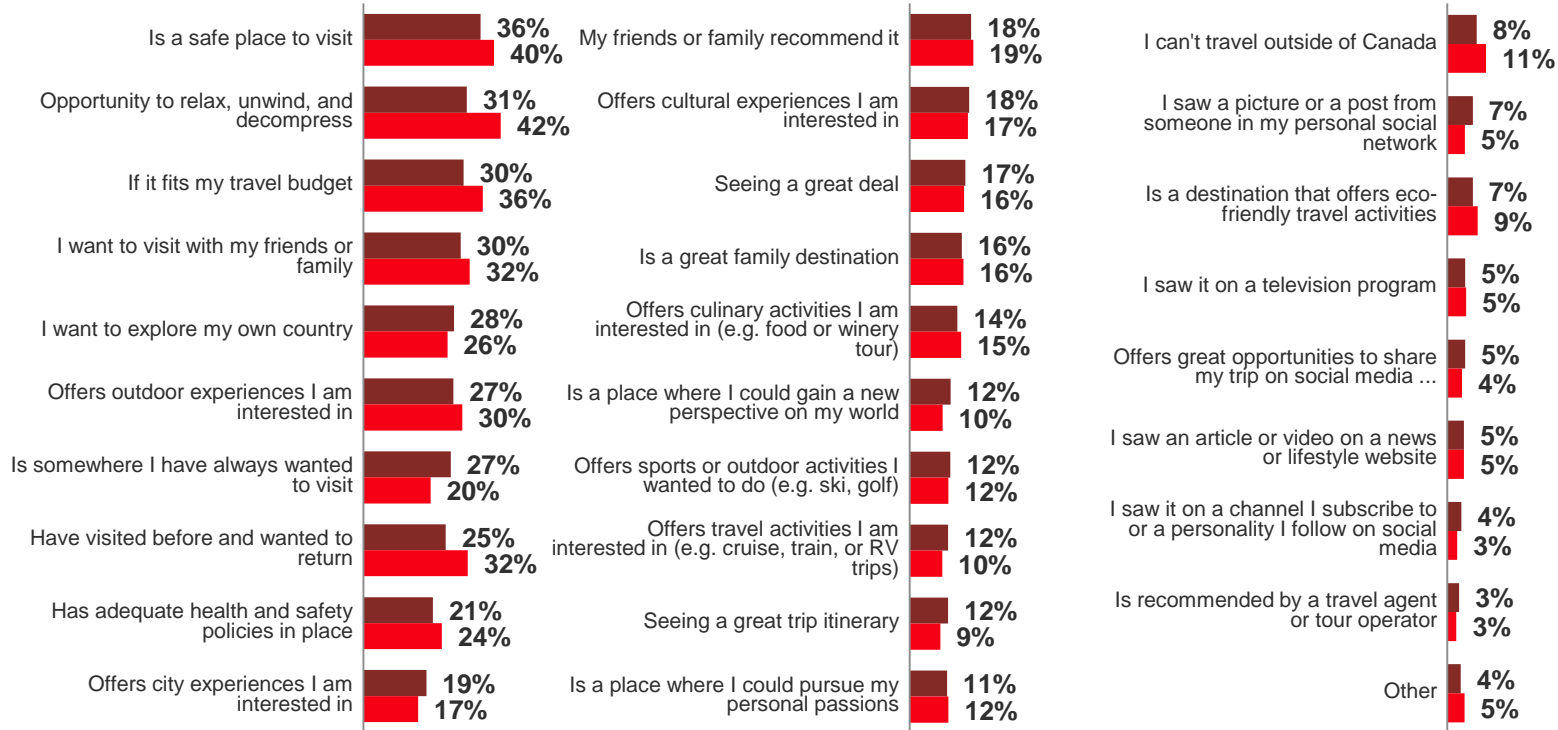
Base: Canadian residents evaluating in-province destinations (n=3430)

FT4. Thinking of your next trip to [a destination outside of your province / a destination within your province], how many nights do you think you would spend?

# Factors Influencing Destination Choice+

Out-of-Province

In-Province



+ New question added in 2020 GTW (November) – no trending.

Base: Domestic out-of-province travellers (n=3830)

Base: Canadian residents evaluating in-province destinations (n=3430)

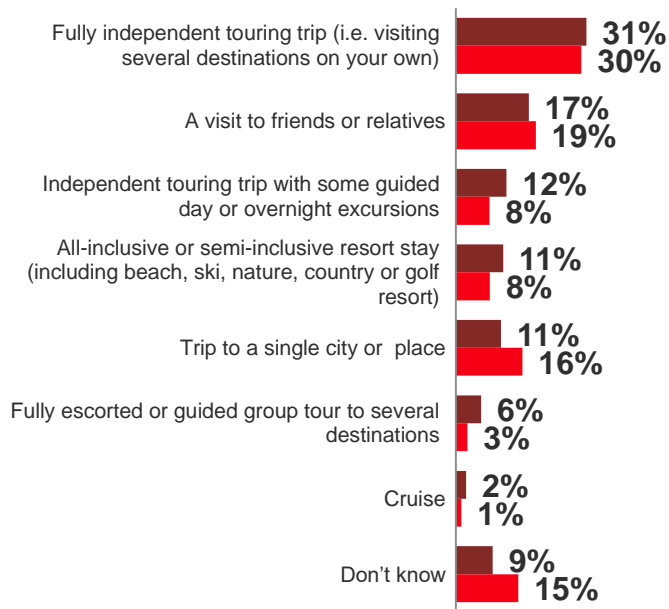
FT3. Thinking of your next trip to [a destination outside of your province / a destination within your province], which of the following would factor into your choice to travel to that destination?

# Trip Type and Accommodation

Out-of-Province

In-Province

## Trip Type<sup>+</sup>

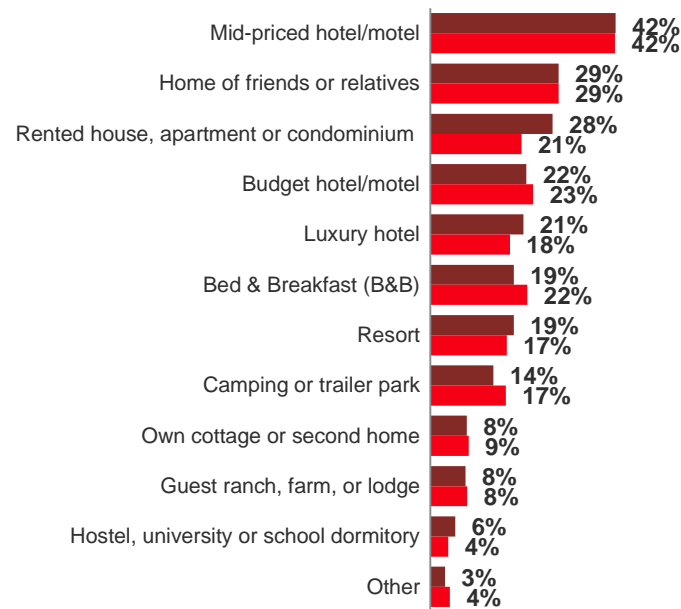


Base: Domestic out-of-province travellers (n=3830)

Base: Canadian residents evaluating in-province destinations (n=3430)

FT9. Thinking of your next to [a destination outside of your province / a destination within your province], what type of trip do you think you would be most likely to book?

## Type of Accommodation<sup>+</sup>



Base: Domestic out-of-province travellers (n=3830)

Base: Canadian residents evaluating in-province destinations (n=3430)

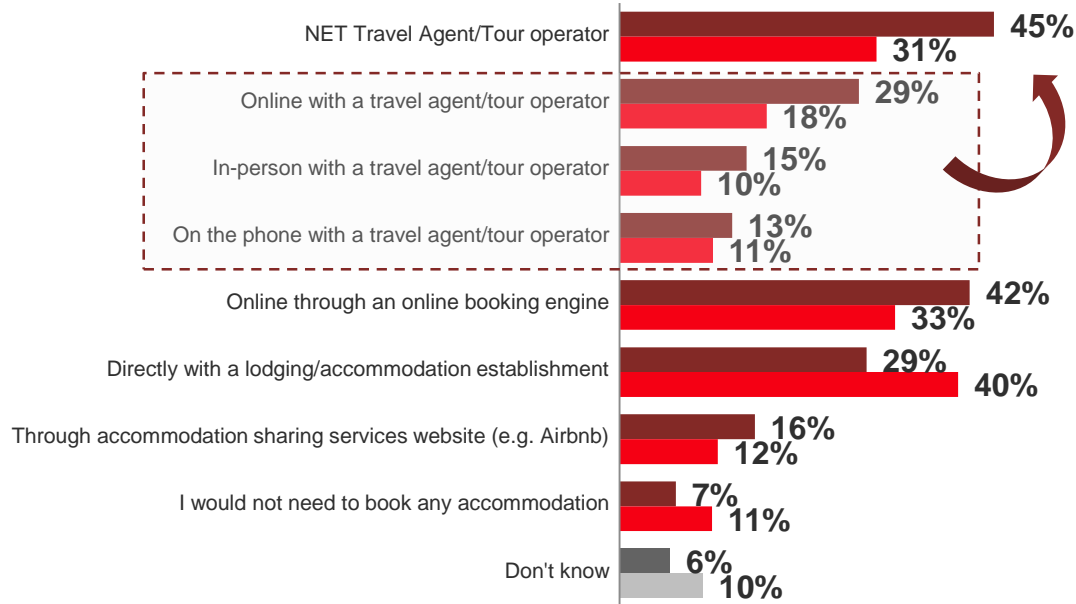
FT10. Thinking of your next trip to [a destination outside of your province / a destination within your province], which types of accommodation would you consider staying at?



# Accommodation Booking Method+

Out-of-Province

In-Province



+ New question added in 2020 GTW (November) – no trending.

Base: Domestic out-of-province travellers (n=3830)

Base: Canadian residents evaluating in-province destinations (n=3430)

FT8. Thinking of your next to [a destination outside of your province / a destination within your province], which methods would you be likely to use to book your accommodation?

# Travel Agent Usage

Out-of-Province

In-Province

Travel Agent Use <sup>+</sup>
11% 5% Definitely
14% 7% Very likely
22% 16% Somewhat likely
25% 28% Not very likely
28% 44% Not at all likely

Definitely/Very/  
Somewhat Likely

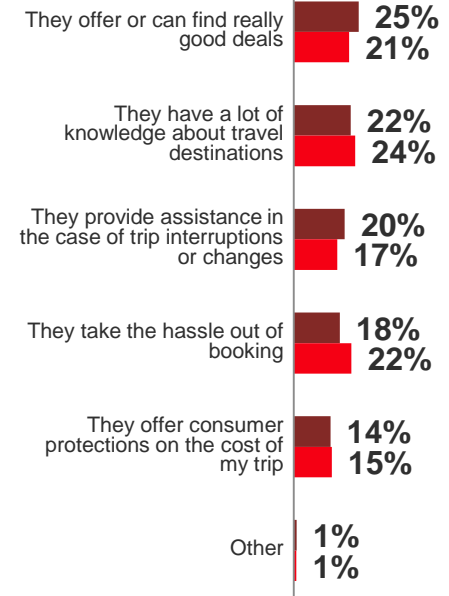
47%  
28%



## Travel Agent Tasks<sup>+</sup>



## Travel Agent Consideration<sup>+</sup>



+ New question added in 2020 GTW (November) – no trending.

Base: Domestic out-of-province travellers (n=3830) / Canadian residents evaluating in-province destinations (n=3430)

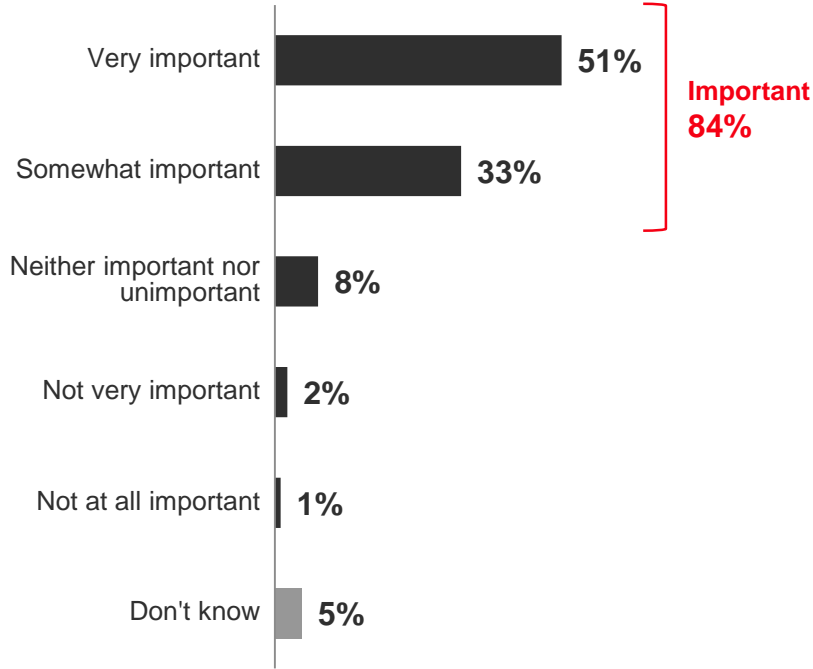
FT6. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Thinking of your next trip to [a destination outside of your province / a destination within your province], how likely are you to use a travel agent or tour operator to help you research or book your trip?

Base: Definitely/very likely/somewhat likely to use travel agent: Domestic out-of-province travellers (n=1638) / Canadian residents evaluating in-province destinations (n=890)

FT7. Which of the following would you have a travel agent or tour operator help you with?

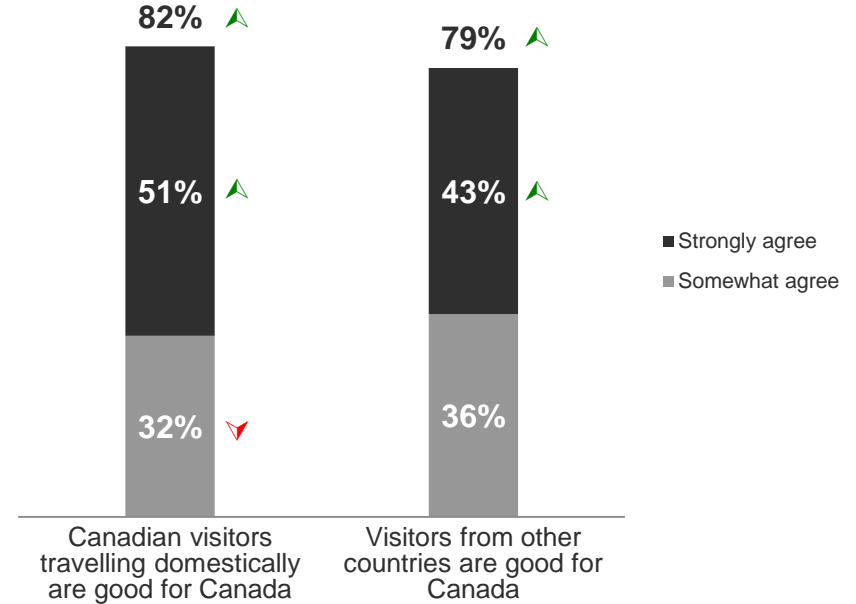
# Sentiments about Tourism

## Importance of Tourism Industry to Canada's Economy



Base: Canadian residents (n=9059)  
PC23. In your opinion, how important is the tourism industry to Canada's economy?

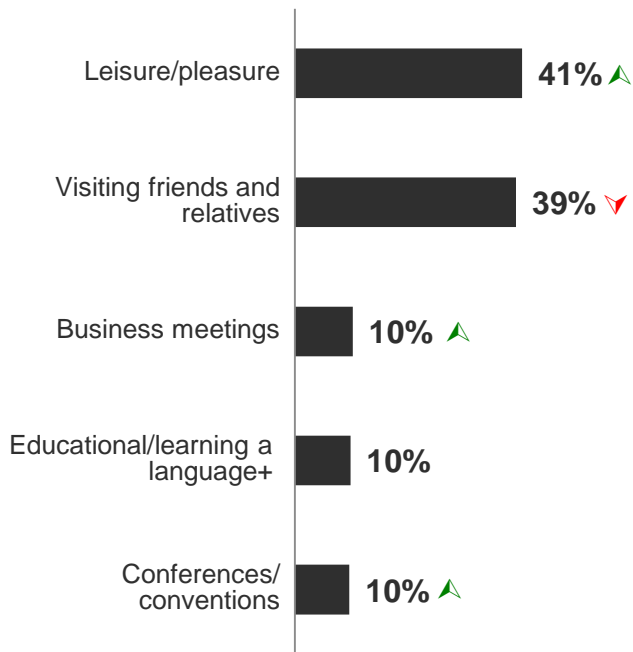
## Opinions About International and Domestic Travel



Base: Canadian residents (n=9059)  
PC27. To what extent do you agree or disagree with each of the following statements?

# COVID-19 Impact on Travel

## Likelihood to Travel by Trip Purpose – Top 2 Box (Definitely/Very Likely)



+ New statement added in 2020 GTW (November) – no trending.  
Base: Canadian residents (n=9059)

COV3. How likely are you to travel in the next year for the following reasons as government restrictions related to COVID-19 are relaxed?

▲ / ▼ Significantly higher / lower than August 2020 wave.

## First Month Comfortable Travelling to Destinations\*

	Oct – Dec 2020	Winter 2021	Spring 2021	Summer 2021	Fall 2021	2022 onwards	No restrictions	Not until vaccine	Already travel here	Don't know
Nearby communities	18%	9%	13%	8%	3%	5%	10%	15%	7%	13%
Within own province	17%	11%	17%	9%	2%	3%	10%	14%	5%	13%
Other parts of Canada	8%	9%	16%	12%	3%	5%	9%	21%	1%	16%
The United States	3%	5%	7%	6%	4%	8%	6%	38%	0%	23%
Other countries (outside of US)	3%	5%	7%	6%	4%	7%	8%	37%	0%	24%

\*Answer statements changed compared to August wave (COVID tracker) – no trending.

Base: Canadian residents (n=9059)

COV5. Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?

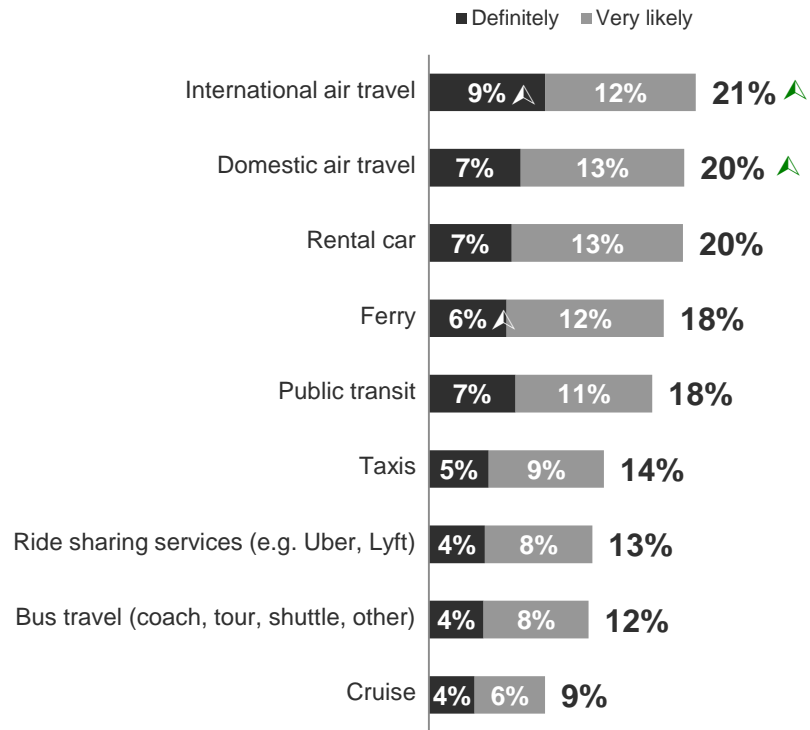
## Attitudes Towards Travel – Top 2 Box (Strongly/Somewhat Agree)

I miss travel – I can't wait to get out and travel again	61%▲
I will visit and participate in outdoor attractions and activities	54%▲
I will visit destinations that I know well or have visited before	52%▲
I will only do one or two things per day to limit social interaction	49%▲
I will visit new destinations that I have never visited before	44%▲
I will spend less than I did on vacation pre-COVID-19	37%
I will visit and participate in indoor attractions and activities	33%▲
I will fill my days with as many attractions/activities as possible	30%▲
I will spend more than I did on vacation pre-COVID-19	19%▲
I feel safe travelling now	16%

Base: Canadian residents (n=9059)

COV13. Thinking of your next trip, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?

# Transportation Modes – Top2Box (Definitely/Very Likely)

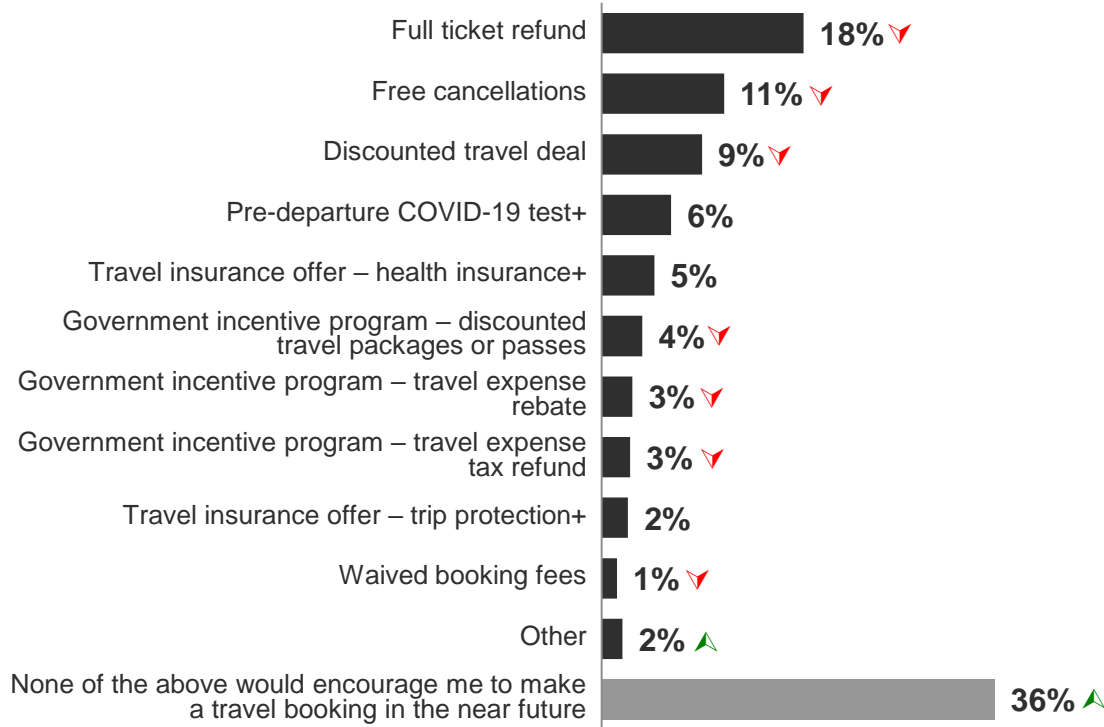


▲ / ▼ Significantly higher / lower than August 2020 wave.

Base: Canadian residents (n=9059)

COV16. As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?

# Offerings to Encourage Travel in Near Future



▲ / ▼ Significantly higher / lower than August 2020 wave.

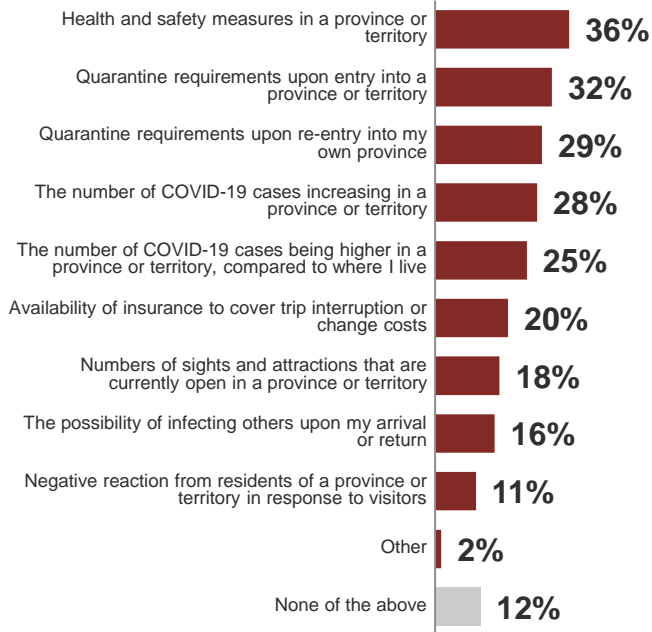
+ New statement added in 2020 GTW (November) – no trending.

Base: Canadian residents (n=9059)

COV17. Which one of the following offerings would most encourage you to make a travel booking in the near future? (Select one)

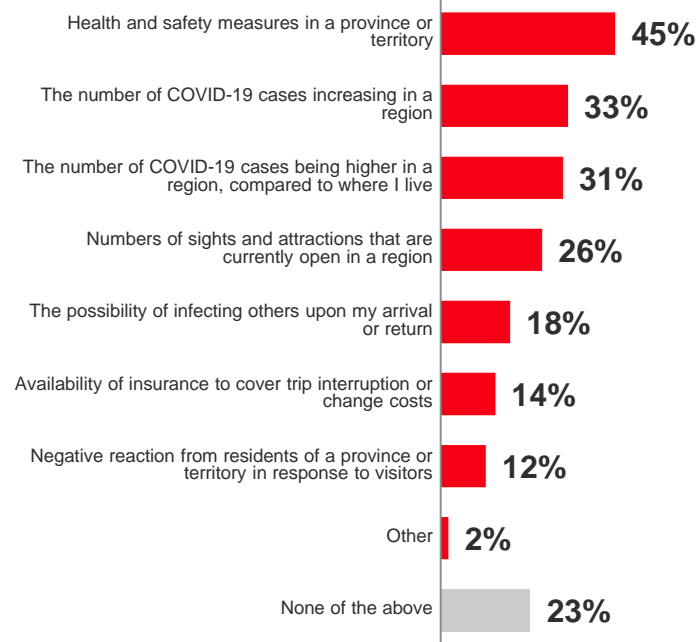
# Most Important Considerations in Selecting Travel Destination+

## Out-of-Province



Base: Domestic out-of-province travellers (n=4528)  
NEWQ4. When thinking about a vacation trip to a destination outside of your province, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

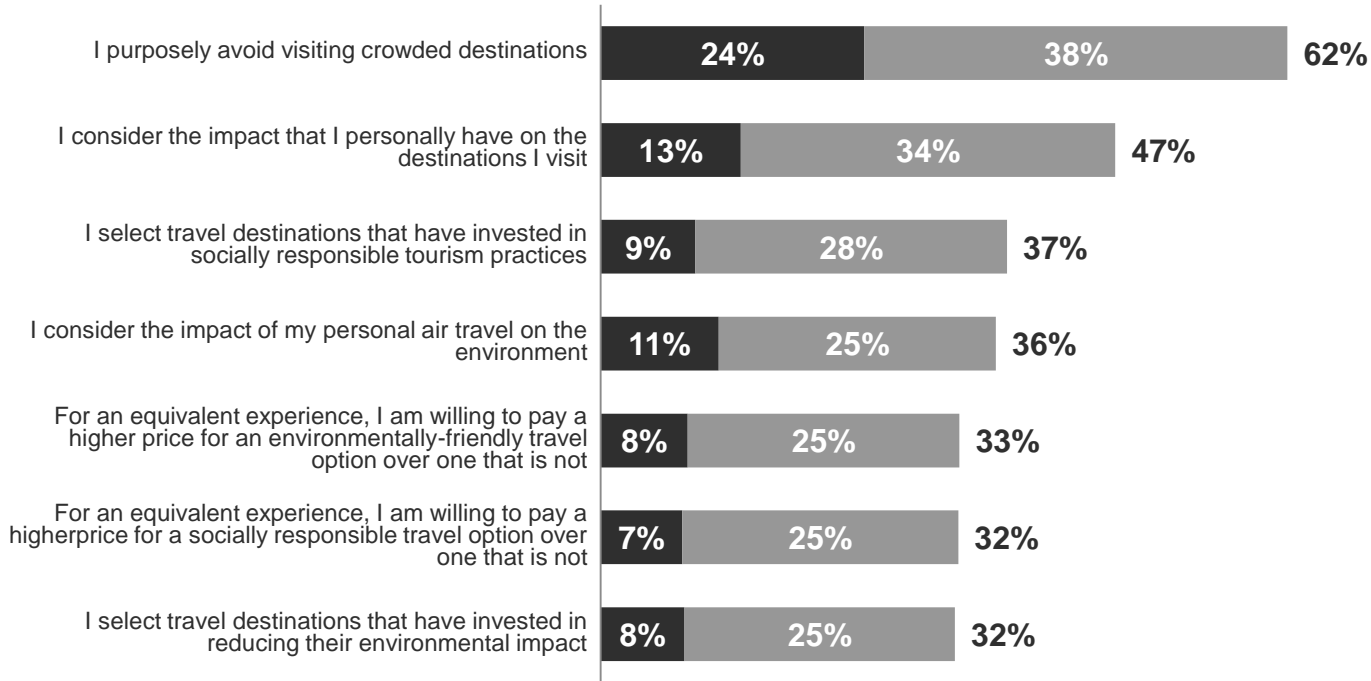
## In-Province



Base: Canadian residents evaluating in-province destinations (n=4531)  
NEWQ4. When thinking about a vacation trip to a destination within your province, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

# Sustainable Travel+

■ Strongly agree ■ Somewhat agree



+ Not asked in the June/July/August waves (COVID tracker) – no trending.

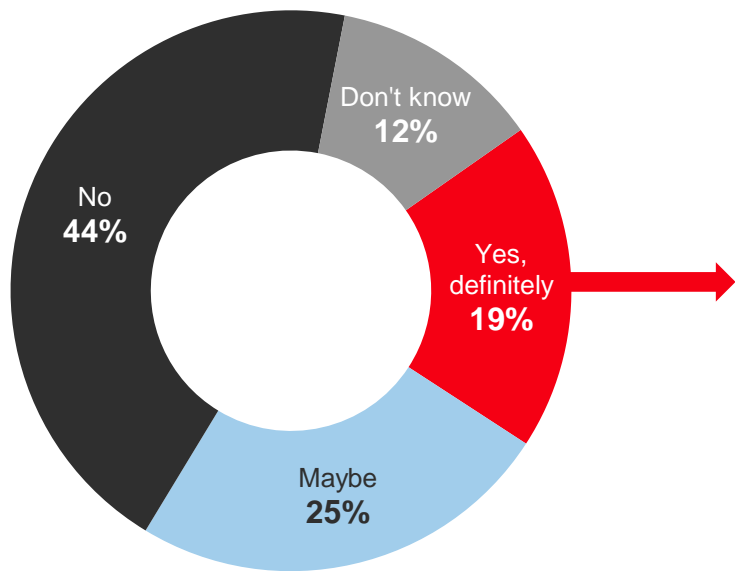
Base: Canadian residents (n=9059)

PC31. Sustainable travel refers to "travel that minimizes any negative impact 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". Please indicate your level of agreement with each of the following statements ...



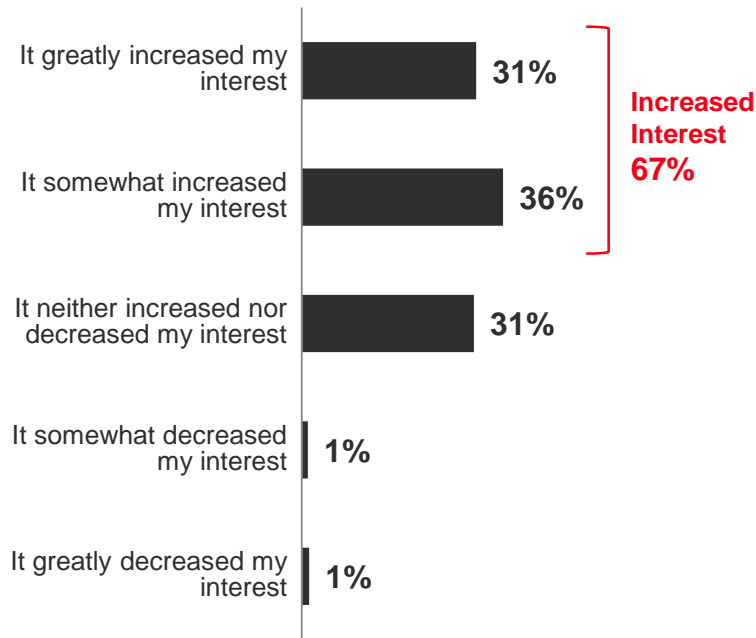
# Articles Read on Travel within Canada

## Saw/Read Articles About Travel within Canada\*



Base: Canadian residents (n=9059)  
PC14. Do you remember seeing or reading any articles about travel within Canada or to specific destinations within Canada in the past six months?

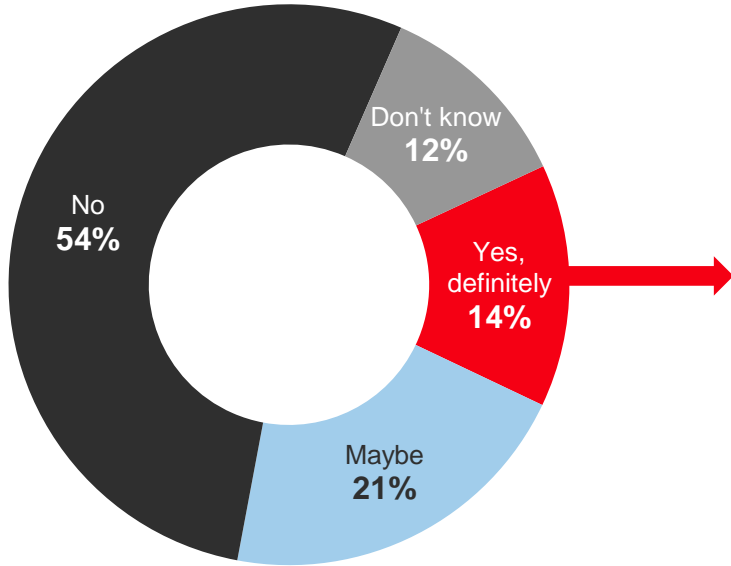
## How Seeing/Reading Articles about Canada Affected Interest\*



Base: Canadian residents who recall seeing/reading about travel within Canada (n=1815)  
PC15. Did seeing or reading articles about Canada affect your interest in travelling within Canada?

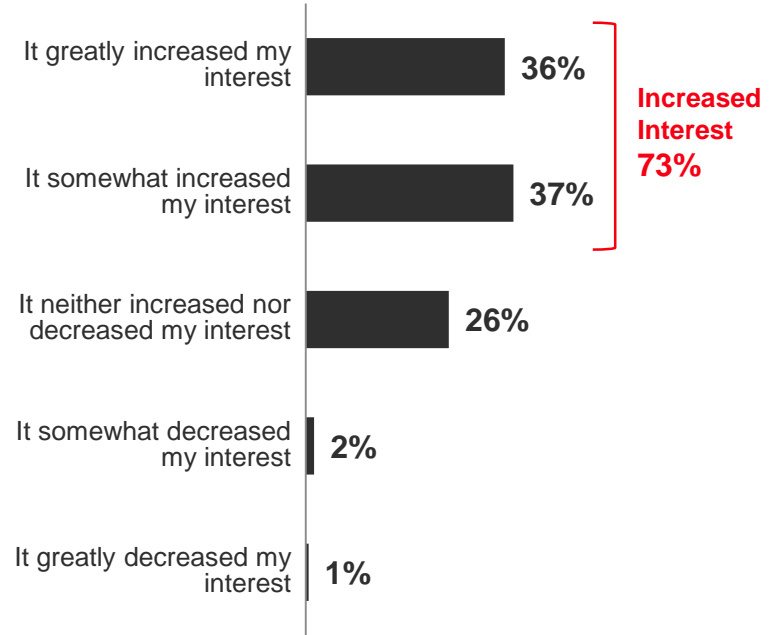
# Online Videos Seen on Travel within Canada

## Saw Video About Travel within Canada\*



Base: Canadian residents (n=9059)  
PC14d. Do you remember seeing any videos online about travel within Canada or to specific destinations within Canada in the past six months?

## How Seeing Videos about Canada Affected Interest\*



Base: Canadian residents who recall seeing videos about Canada (n=1353)  
PC15d. Did seeing videos online about Canada affect your interest in travelling within Canada?

	Out-of-Province Travellers										
	Total (Out-Prov) (n=4528)	BC (n=750)	AB (n=750)	SK (n=250)	MB (n=250)	ON (n=1050)	QC (n=753)	NB (n=200)	NS (n=200)	PEI (n=125)	NF (n=200)
<u>Gender:</u>											
Male	51%	56%	54%	52%	58%	49%	51%	45%	44%	47%	42%
Female	49%	44%	46%	48%	43%	51%	49%	55%	56%	53%	59%
<u>Age:</u>											
18 to 34	33%	25%	26%	27%	24%	45%	28%	17%	22%	4%	23%
35 to 54	33%	42%	40%	32%	46%	30%	30%	36%	32%	17%	30%
55 or older	34%	33%	34%	41%	30%	25%	41%	47%	46%	80%	47%
<u>Children in household under the age of 18:</u>											
Yes	26%	24%	30%	23%	30%	29%	22%	25%	26%	11%	19%
<u>Annual household income:</u>											
Less than \$50,000	23%	22%	22%	27%	28%	23%	24%	27%	23%	21%	31%
\$50,000 to \$99,999	37%	38%	31%	37%	35%	38%	38%	40%	41%	33%	33%
\$100,000 or more	29%	29%	36%	27%	24%	29%	29%	26%	28%	29%	24%

# Demographics

In-Province

	Respondents Evaluating In-Province Destinations										
	Total (In-Prov) (n=4531)	BC (n=750)	AB (n=750)	SK (n=250)	MB (n=250)	ON (n=1051)	QC (n=754)	NB (n=200)	NS (n=200)	PEI (n=125)	NF (n=201)
<u>Gender:</u>											
Male	47%	47%	46%	48%	55%	47%	48%	35%	40%	37%	32%
Female	53%	53%	55%	52%	45%	53%	52%	65%	60%	63%	68%
<u>Age:</u>											
18 to 34	23%	25%	21%	11%	22%	31%	16%	12%	9%	12%	17%
35 to 54	36%	39%	39%	33%	43%	34%	35%	39%	32%	33%	33%
55 or older	41%	36%	40%	56%	34%	35%	49%	49%	59%	55%	50%
<u>Children in household under the age of 18:</u>											
Yes	21%	19%	23%	17%	23%	23%	16%	26%	17%	20%	23%
<u>Annual household income:</u>											
Less than \$50,000	35%	33%	27%	32%	36%	34%	39%	41%	48%	36%	39%
\$50,000 to \$99,999	33%	31%	34%	34%	33%	33%	34%	27%	32%	30%	28%
\$100,000 or more	20%	22%	23%	17%	19%	21%	16%	16%	12%	19%	17%

▲ / ▼ Significantly higher / lower than August 2020 wave.